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Annual report on intra-EU labour mobility 2024 Edition

Directorate-General for Employment, Social Affairs and Inclusion

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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		
DK	Denmark	**IE**	Ireland	**NO**	Norway		

Abbreviations and acronyms

AROP	At-risk-of-poverty
AROPE	At-risk-of-poverty-and-social-exclusion
EFTA	European Free Trade Association, consisting of Iceland, Liechtenstein, Norway, and Switzerland[2]
ELET	Early leavers from education and training
EPSR	European Pillar of Social Rights
EU	When not otherwise specified, 'EU' refers to the composition of the European Union in the reference year
EU-27	The European Union in its current composition of 27 Member States
EU-LFS	EU Labour Force Survey[3]
EURES	European Employment Services, a cooperation network of public employment services, other employment services, trade unions, employers' organisations and other relevant actors in the labour market
EU-SILC	EU Statistics on income and living conditions[4]
ISCO	The international standard classification of occupations[5]

[1] This report generally lists countries in alphabetical order of their codes, as per the guidelines in Publications Office of the European Union (2022), Interinstitutional Style Guide, Luxembourg, Publications Office of the European Union, Section 7.1. Exceptions are made when, for reasons of clarity, they are arranged by data size.

[2] Due to data restrictions, Liechtenstein is omitted from the analysis in this report.

[3] Eurostat (2024a), *European Union Labour Force Survey (EU-LFS)* [Online]: https://ec.europa.eu/eurostat/web/microdata/european-union-labour-force-survey [Accessed 18 March 2024].

[4] Eurostat (2024b), *EU statistics on income and living conditions (EU-SILC)* [Online]: https://ec.europa.eu/eurostat/web/microdata/european-union-statistics-on-income-and-living-conditions [Accessed 18 March 2024].

[5] International Labour Organization (ILO) (2024a), *The International Standard Classification of Occupations-ISCO-08* [Online]: https://isco-ilo.netlify.app/en/isco-08/ [Accessed 18 March 2024].

ISCED	International Standard Classification of Education[6]
NACE	Nomenclature statistique des activités économiques dans la Communauté européenne (Classification of economic activities in the European Union (EU))[7]
NEET	Young people neither in employment nor in education and training
SMSD	Severe material and social deprivation
TCN	Third-country nationals, i.e. residents of EU and EFTA countries who are neither EU nor EFTA citizens
TFEU	Treaty on the Functioning of the European Union

Definitions

Active	This category involves those who are in employment, or seeking employment (i.e. registered as unemployed). 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[8].
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[9].
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 Member State). 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.
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[10], 'usual residence' means the place at which a person normally spends the daily period of rest (…) or, by default, the

[6] Eurostat (2024c), *International Standard Classification of Education (ISCED)* [Online]: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=International_Standard_Classification_of_Education_(ISCED)#Background [Accessed 18 March 2024].

[7] Eurostat (2024d), *NACE – Overview* [Online]: https://ec.europa.eu/eurostat/web/nace [Accessed 18 March 2024].

[8] Eurostat (2024e), 'EU Labour Force Survey Database User Guide', Eurostat, Luxembourg, p. 43.

[9] Swiss Confederation Central Compensation Office (CCO) (2024*), Agreement on the Free Movement of Persons - EU* [Online]: https://www.zas.admin.ch/zas/en/home/bases-legales-et-coordination-internationale/coordination_internationale_securite_sociale/accord_libre_circulation_ue.html [Accessed 18 March 2024].

[10] 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.

	place of legal or registered residence. In this report, persons are counted as residents of a certain country if they are registered and have resided there for at least 12 months or intend to do so. This is in line with the measurement, as the EU-LFS[11] 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	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 may include the legally defined groups of seasonal[12] and frontier workers[13] and may also include some posted workers as specified in Regulation (EC) 883/2004[14]. 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 and EFTA movers – meaning they live in a different Member State to 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).
Eastern European countries	Bulgaria, Czechia, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovenia, Slovakia (definition created for the purpose of this study).
Employed	Any person engaged in an activity to produce goods or provide services for pay or profit[15]. 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 and EFTA movers	EU or EFTA citizens who reside in an EU or EFTA country other than their country of citizenship.
Inflows	The total number of persons who establish their usual residence[16] 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[17].
Inactive	Any person who is neither employed nor unemployed/searching for a job (see above and below); this group of inactive typically includes people in retirement or early retirement, pupils/students/people in

[11] Eurostat (2018), 'EU Labour Force Survey Explanatory Notes (to be applied from 2017Q1 onwards)', Eurostat, Luxembourg.

[12] 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). They enjoy the right to free movement according Regulation (EU) No 492/2011 and equal treatment with nationals, according to Directive (EU) No 2014/54. For more details on the definition, cf. Fries-Tersch, et al. (2017), '2016 Annual Report on intra-EU Labour Mobility', Section 2.2.3.

[13] 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 on the coordination of social security systems, Article 1(f). They have the right to equal treatment with nationals, according to Directive 2014/54/EU of 16 April 2014 on measures facilitating the exercise of rights conferred on workers in the context of freedom of movement for workers.

[14] Regulation No 883/2004.Further explanations on the legislative framework can be found in the specific report on posting: De Wispelaere, et al. (2021), 'Posting of workers: Report on A1 Portable Documents issued in 2020', European Commission (DG EMPL), Brussels.

[15]International Labor Organization (ILO) (2024b), *Concepts and definitions* [Online]: https://ilostat.ilo.org/resources/concepts-and-definitions/ [Accessed 18 March 2024].

[16] According to Regulation (EC) No 862/2007 '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'.

[17] 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.

	training, homemakers, those in compulsory military service, those with permanent disabilities[18].
International Standard Classification of Occupations (ISCO)	A hierarchically structured categorisation that clusters all jobs in the world into 436-unit groups (ISCO-4D). These groups, which form the most detailed categorisation structure, are combined into 10 major groups (ISCO-1D), 43 sub-major groups (ISCO-2D), and 130 minor groups (ISCO-3D) based on their similarity of skill level and specialisation needed for the jobs. This report largely utilises ISCO-1D and ISCO-2D categorisations[19].
Length of stay	Years that movers have resided in the current country of residence.
Mobile worker	Active EU/EFTA 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 or EFTA country other than their country of citizenship and/or working in a different Member State or EFTA country to that where they reside (cross-border workers) are practising 'mobility'.
Mover	See entry for EU and EFTA movers.
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).
Nordic countries	Denmark, Finland, Iceland, Norway and Sweden.
Outflows	The total number of persons in the reference year who cease to have their usual residence[20] in a Member State for a period that is, or is expected to be, at least 12 months[21].
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 (Article 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 (Article 12); and such persons who pursue an activity as an employed/self-employed person in two or more Member States (Article 13)[22]. While the last group are strictly speaking not considered as 'posted workers', in some cases the persons covered by Article 13 might also be posted under the conditions of the Posting of Workers Directive and their numbers are also estimated through PD A1 documents.

[18] This list corresponds to different categories of inactive persons, as differentiated in the EU-LFS for the MAINSTAT variable, see: Eurostat (2024e).

[19] International Labour Organization (ILO) (2024a).

[20] According to Regulation (EC) No 862/2007 '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'.

[21] 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.

[22] For further information on the legislative background, see De Wispelaere, et al. (2021).

	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 Article 12 applies is provided in a footnote.
Recent movers	Movers who have resided in their country of residence for less than two years.
Returnee	A person carrying out return mobility (see below).
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 stay abroad of 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, the 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[23].
Unemployed	Any person who is not currently employed but who is available for work within two weeks and is actively seeking work (as per the ILO definition).
Unemployment rate	The share of unemployed from all active (unemployed plus employed) persons in a given reference population.
Working-age	People aged between 20 and 64 years.

[23] Eurostat (2024e).

Executive summary

This annual report presents updated insights into the labour mobility developments in EU and EFTA countries using data for 2022 and 2023. The analysis encompasses the mobility of all working-age EU citizens (aged 20-64). Chapter 1 delves into the movement and characteristics of the mobile population in the EU and EFTA. Chapter 2 expands on the labour market participation and integration of EU movers. Chapter 3 looks at the social conditions of movers in the EU. Chapter 4 examines the mobility of EU citizens in the healthcare sector.

Main findings

Table 1: Main indicators of intra-EU labour mobility in 2023

Type of mobility	1 January 2023	1 January 2022	Change 2022/2023
1. Long-term EU movers in the EU according to Eurostat population statistics			
• **All ages** *	13.9 million	13.7 million	(+2 %)
• **Working-age** (20-64 years) *	10.1 million	9.9 million	(+2 %)
Working-age movers as a share of the total working-age population	3.8 %	3.8 %	(±0.0 pps)
	Annual avg 2023	**Annual avg 2022**	**Change 2021/2022**
2. **Long-term EU and EFTA movers in the EU according to the EU-LFS**			
• **Working-age** (20-64 years) **	8.6 million	8.4 million	(+2.6 %)
• … of which **active movers** (employed or looking for work) **	7.2 million	7 million	(+3 %)
Active movers as a share of the total labour force	3.5 %	3.4 %	(+0.1 pps)
3. Cross-border workers + (20-64 years)	1.83 million	1.78 million	(+2.8 %)
As a share of the total number of employed EU citizens in the EU ++	1 %	1 %	(±0.0 pps)
	2023	**2022**	**Change 2022/2023**
4. Number of postings +++ (of employed and self-employed), all ages (no. of PDs A1) ***	5.5 million ++++	4.6 million	(+19.5 %)
… equals approximate number of persons (estimated number) +++++	3.5 million	3.1 million	(+13 %)
	2022	**2021**	**Change 2021/2022**
5. Annual return mobility (20-64 years) ****	738 000	698 000	(+6 %)
… as a ratio to EU nationals leaving their country of origin in 2021 *****	75 %	83 %	(-8 pps)

* *Source:* Eurostat population statistics [Migr_pop1ctz][24]. According to Eurostat population statistics, the total working-age population in the EU in 2023 was 262.8 million, and in 2022 260.5 million.

** *Source:* EU-LFS, custom extraction by Milieu. According to EU-LFS statistics, the total active population in the EU in 2023 was 207 million and in 2022 it was 205 million.

*** *Source:* HIVA-KU Leuven, administrative data PD A1 questionnaire. These figures exclude the UK.

**** *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][25]. Share of EU nationals moving to their country of citizenship (returnees) from EU nationals leaving their country of citizenship (outflows), age group 20-64. Figures are calculated based on aggregates excluding Cyprus, Estonia, Portugal, Greece and France for both return

[24] Eurostat (2024g), *Immigration by age group, sex and citizenship [Migr_imm1ctz]* [Online]: https://ec.europa.eu/eurostat/databrowser/view/migr_imm1ctz/default/table?lang=en [Accessed 18 March 2024].

[25] Ibid, Eurostat (2024h), *Emigration by age group, sex and citizenship [Migr_emi1ctz]* [Online]: https://ec.europa.eu/eurostat/web/products-datasets/-/MIGR_EMI1CTZ [Accessed 18 March 2024].

mobility and outflows, as figures are not available for outflows of nationals. Additionally, 2021 values are used instead of 2022 for Romania because of limited data availability at the time of writing.

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

[++] Note: The number of total employed EU citizens in the EU in 2023 was 183.6 million and in 2022 was 184.5 million. This number includes employed EU nationals working in their country of citizenship, employed EU movers in another EU or EFTA country and cross-border workers living in an EU country and working in an EU or EFTA country. The number of cross-border workers used for this calculation only includes those who are nationals of their country of residence; cross-border workers who are not nationals of their country of residence would also be EU movers.

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

[++++] Note: Of these, 3.6 million were covered under Art. 12 (approximately 2 million persons), 1.7 million under Art. 13 (approximately 1.5 million persons), 0.2 million for others (e.g. Art. 16).

[+++++] Note: Based on figures provided by 19 Member States, discussed more extensively in De Wispelaere, F., De Smedt, L. & Pacolet, J. (forthcoming), 'Posting of workers – Report on A1 Portable Documents issued, HIVA - KU Leuven, Leuven.

1. Recent developments on the mobile working-age population

Overall, the **number of working-age EU movers** remained **relatively stable** over the last five years. It was at **around 10.1 million**[26] in 2023 (+2 % relative to 2022) out of the total number of 13.9 million movers of all ages. The rise in labour mobility flows that began in 2021 continued in 2022, returning to pre-pandemic levels. However, the most remarkable increase of movement was experienced by third-country nationals, where immigration doubled between 2021 and 2022 reaching 3 324 000 in 2022 (+133 %). This is likely attributed to the Russia's war of aggression against Ukraine.

EU movers are predominantly young and male. 57 % of the incoming EU and EFTA movers in 2022 were male. This male predominance was particularly pronounced in eastern and central European destination countries such as Latvia, Poland and Bulgaria. Furthermore, 53 % of incoming EU and EFTA movers were 20-34 years old. The highest proportions of this age group were found in the Netherlands (70 %), Denmark (67 %) and Malta (64 %).

The main countries of origin and destination of EU movers have been consistent over the years. Romanians continue to lead, constituting 25 % of all EU movers, followed by Polish nationals at 12 %, and Italians at 9 %[27]. In terms of destination, just over 34 % of working-age EU movers (3.4 million individuals) live in Germany, solidifying its status as the top destination for EU movers in 2023. Luxembourg stood out with the highest share of EU movers relative to its total population (40 %).

The number of cross-border workers and postings increased. There were approximately 1.8 million cross-border workers reported in the EU and EFTA in 2023, a 3 % increase compared to the previous year. Similarly to the previous years, the most important countries of origin were France, Germany and Poland, whereas the main destination countries were Germany and Switzerland. When it comes to postings, the total number of issued Portable Documents A1 (PDs A1) amounted to 5.5 million

[26] This estimate is based on Eurostat population statistics. According to EU-LFS data, which is differently sampled, there are around 8.6 million EU movers.

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

(+19.5 % compared to 2022)[28]. Germany accounts for most of the increase in the number of issued posting documents, followed by Poland.

There has been an increase in the number of movers returning to their home countries. An estimated 738 000 movers returned to their countries of origin in 2022, a 6 % increase compared to 2021. Germany was the largest destination for returnees at 102 000[29].

2. The labour market integration of mobile workers

In 2023, both activity (83 %) and employment (78 %) rates continued their upward trends. EU movers have had a higher employment rate compared to nationals (76 % employment rate) and third-country nationals (63 %).

The share of EU movers with part-time contracts and fixed-term contracts continues to decline slowly. Between 2018 and 2023, the shares of EU movers on fixed-term and part-time contracts declined by 5 percentage points (from 19 % to 14 % between 2018-2023) and 1 percentage point (from 22 % to 21 % in the same period), respectively. Similar trends are experienced by nationals and third-country nationals.

The integration of female EU movers in employment remains low. Similarly to the previous year, the employment rate of female movers is 14 percentage points (pps) lower than that of male movers. In contrast, the gap slightly decreased for nationals (-1 pp) and third-country nationals (- 2 pps). The gender gap in part-time employment among EU movers is significantly larger at 28 pps, indicating a higher proportion of female EU movers working part-time compared to their male counterparts. This is well above the 20 pps difference observed among nationals. Although the difference in the prevalence of fixed-term contracts is less pronounced, female movers still experience a higher incidence of these contracts compared to their male counterparts.

Younger movers (aged 20-34) have the highest unemployment rates while older movers (aged 50-64) the lowest activity rate[30]. In 2023, the unemployment rate for younger movers is 8 %, which is 1-2 pps higher than that of other age groups. Meanwhile, the activity rate for older movers is 77 % in 2023, 6 pps lower than that of younger movers and 10 pps lower than movers aged 35-49. These values are consistent with those observed among nationals and third-country nationals.

Since COVID-19 there has been a slight increase in the share of movers with low education. In 2023, 30 % of EU movers had low educational attainment, marking a 3 pps increase since 2020, while the share of those with high education remained at 32 %. These developments contrast with those observed among nationals, who exhibit a steady decline in low education levels and a consistent increase in high educational attainment. The greatest increase in the share of highly educated individuals was experienced by third-country nationals (+5 pps between 2018 and 2023).

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

[29] Section 1.4.3 shows Romania as the main destination for returnees. Since 2022 data for Romania is unavailable and estimated from 2021, Germany , the second major destination, is highlighted instead.

[30] 'Activity rate' is to be understood, here and elsewhere in the report, as the proportion of the working-age population that is either employed or unemployed/looking for work. This is to be contrasted with those who are inactive or outside the labour market e.g. retirement, education, or long-term sick leave.

Professionals is the most common occupation among EU movers. In 2023, the absolute number of movers in this occupation (1.16 million or 18 %) surpassed that in elementary occupations (1.5 million or 18 %). Manufacturing (16 %) remains the largest sector of work for movers, followed by construction and transportation and storage (11 % each). Since 2018, the number of movers increased most substantially in the information and communication (+47 %) and transportation and storage (+37 %) sectors.

3. Social conditions of movers in the EU

EU movers face higher risks of poverty and social exclusion compared to nationals but fare better than third-country nationals. In 2022, 27 % of EU movers were at risk of poverty and social exclusion (AROPE), compared to 19 % of nationals and 46 % of TCNs. There has been a slight decline in AROPE rates for all groups since 2017. Furthermore, in 2022, 8 % of EU movers experienced severe deprivation, compared to 6 % of nationals. Housing cost overburden remains a significant issue, with 19 % of EU movers spending more than 40 % of their income on housing, more than double the rate for nationals (8 %).

Educational attainment is improving but challenges remain for lifelong learning and early school leaving. Tertiary education attainment among EU movers (aged 30–34) increased from 35 % in 2017 to 39 % in 2022, reflecting steady progress. However, it remains below the 43 % attainment rate for nationals. Participation in lifelong learning is limited, with EU movers stagnating at 3 % between 2017 and 2022 – similar to nationals (4 %) but notably lower than third-country nationals (7 %). Young EU movers face additional challenges, with an early school leaving rate (ELET) of 22 % in 2022 – nearly three times higher than nationals (8 %).

Digital skills are improving. By 2023, 55 % of EU movers had at least basic digital skills, nearly closing the gap with nationals (56 %) and reflecting progress in addressing the digital divide.

Elevated NEET rates indicate barriers to integration. In 2022, 14 % of young EU movers (aged 15–29) were not in employment, education, or training (NEET), compared to 11 % of nationals. This persistent disparity highlights barriers to educational and labour market integration for EU movers.

EU movers show high median income and moderate inequality. The EU-wide median income of EU movers (EUR 20 714 in 2022) consistently exceeded that of nationals (EUR 19 506). Although both EU movers and nationals experienced income growth between 2017 and 2022, nationals' median income grew at a faster rate (2.6 % annually compared to 1.9 % for movers). The quintile share ratio (S80/S20) for EU movers stood at 7 in both 2021 and 2022, slightly lower than the ratio for nationals (8). This suggests moderate income inequality at the EU level.

4. Mobility of healthcare workers

Women comprise the majority of healthcare professionals among EU movers. Between 2017 and 2023, the proportion of women among healthcare professionals was consistently higher among EU movers (90-94 %) compared to nationals (79-80 %).

EU movers in healthcare professions are ageing. The share of EU movers aged 45 and over increased significantly, from 51 % in 2017 to 62 % in 2023.

EU movers in healthcare are more likely to hold permanent contracts than nationals. By 2023, 96 % of EU movers had permanent contracts, compared to 86 % of nationals. This trend has been strengthening since 2019, with EU movers seeing a continuous rise in permanent employment.

EU movers in healthcare are more likely to work full-time compared to nationals. In 2023, 74 % of EU movers were in full-time jobs, compared to 68 % of nationals. This pattern has remained steady since 2017, except for a temporary increase during the COVID-19 pandemic, when 79 % of EU movers worked full-time in 2020.

Returnees in healthcare offer an opportunity to address potential healthcare shortages in Member States. In 2023, returnees accounted for 3 % of national healthcare workers in Spain and 8 % in Sweden, demonstrating their growing contribution to national healthcare systems.

Introduction

Aim of the report

This year's report presents an analysis of labour mobility trends across the European Union (EU) and the European Free Trade Association (EFTA) countries, drawing on data for the years 2022 and 2023. In doing so it delivers on Article 29 of Regulation (EU) 2016/589[31], namely, to monitor and make public labour mobility flows and patterns in the Union.

Labour mobility within the EU and EFTA profoundly impacts the dynamics of national and regional labour markets and contributes to the socio-economic development of Member States. Recognising the diversity and interconnectedness of Europe and understanding the movement of workers assumes paramount importance for policymakers, businesses, and individuals.

The first two chapters of this report focus on the mobility of working-age EU citizens, aged 20 to 64, and delve deeper into the specific characteristics and dynamics of those who actively participate in the labour market, both employed and unemployed. The third chapter is dedicated to understanding how the mobility of workers in various occupations in the healthcare sector has changed since 2017, when the sector was last examined by this report. The chapter identifies changes in the aftermath of the COVID-19 pandemic and what these changes mean as the demand for health services in the EU increases.

Legal background: EU applicable rules

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)[32]. In 1993, the Maastricht Treaty expanded 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[33]. 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[34]. Inactive EU citizens have the

[31] Regulation (EU) 2016/589 on a European network of employment services (EURES), workers' access to mobility services and the further integration of labour markets.

[32] Regulation (EU) No 492/2011 on freedom of movement for workers within the Union.

[33] 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.

[34] Ibid.

right to reside in another Member State for more than three months if they have sufficient resources and comprehensive sickness insurance cover[35]. 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.

The free movement of persons also applies to countries that are part of EFTA[36], as a result of the Agreement creating the European Economic Area (EEA) and the Agreement on the Free Movement of Persons with the Swiss Federation[37].

Structure of the report

Building mainly on population statistics, Chapter 1 examines the annual flows of EU movers in the EU and EFTA countries in 2022, as well as the total number of movers residing there at the beginning of 2023. Comparison is made between countries in 2022 (or the most recently available year), and on an EU aggregate level since 2018. The focus is on the current 27 Member States of the EU; however, data limitations mean that for some indicators, comparison over time is made for the EU-28 in 2019 and earlier, and for the EU-27 thereafter. This is clearly indicated in the notes to each figure and table.

Chapter 2 focuses on the labour market integration of mobile workers, thereby making use of the EU Labour Force Survey. The first section of the chapter compares activity, employment and unemployment rates, levels of self-employment among movers and third-country nationals compared to nationals, and the incidence of temporary work contracts and part-time work[38].

As in previous years, Chapters 3 and 4 offer a thematic analysis on specific aspects of intra-EU mobility (see Box 1). Chapter 3 provides an analysis of the social conditions experienced by mobile workers, focusing on key indicators such as poverty and social exclusion, education, and income inequality. Chapter 4 investigates mobility amongst healthcare occupations, which was last visited in 2017. Since then, a worldwide pandemic that tested healthcare systems across the EU and the world has occurred. This chapter presents the trends and changes since the last report on this topic and how EU movers are filling the healthcare gaps that are arising across the EU.

[35] Juravle, et al. (2013), 'A fact finding analysis on 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 (DG EMPL), Brussels.

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

[37] Decision (EC) 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) 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.

[38] Note that these two indicators were first included in the 2022 report and were not previously analysed in the annual updates.

Box 1: Topics addressed in previous editions of the report

- Fair intra-EU labour mobility and cross-border pensions (2023)[39]
- Cross-border workers; occupational mobility (2022)[40]
- The impact of the COVID-19 pandemic on mobility; return mobility (2021)[41]
- Mobility of high-skilled workers; impact of demographic change (2020)[42]
- Mobility spells – analysis of length of stays abroad of EU movers (2019)[43]
- Qualifications of EU-28 movers; household composition of EU-28 movers (2018)[44]
- The gender dimension of mobility; language and other obstacles and drivers of mobility; mobility of health professionals (2017)[45]
- Mobility of pensioners; return mobility (2016)[46]
- Cross-border workers (2015)[47]
- Mobility of young and highly educated people (2014)

Overview of key indicators and data sources

While definitions of specific concepts and terms are provided at the onset of the report, it is worth reiterating a few customary terms that are applied throughout this report:

- **EU:** Unless otherwise specified, any mention of ‘the EU’ refers to the current composition of the European Union in 27 Member States. This also applies to mentions of ‘EU movers’.

- **EU movers, EU and EFTA movers:** EU movers refer to individuals of EU nationality that reside in another EU or EFTA country. ‘EU and EFTA movers’ include those of both EU and EFTA nationality, usually for reasons of data availability.

- **Age of reference population:** Unless explicitly stated otherwise, the reference population is working-age individuals aged between 20 and 64. This definition is aligned with the social scoreboard, which sets the employment rate of 20-64-year-olds as a headline indicator.

Different forms of **labour mobility** are identified and analysed in this report.

[39] Hassan, et al. (2023), '2023 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

[40] Hassan, et al. (2022), '2022 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

[41] Fries-Tersch, et al. (2022), '2021 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

[42] Fries-Tersch, et al. (2020a), '2020 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

[43] Fries-Tersch, et al. (2020b), '2019 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

[44] Fries-Tersch, et al. (2018a), '2018 Annual report on intra-EU labour mobility', European Commission (DG EMPL), Brussels.

[45] Fries-Tersch, et al. (2018b), '2017 annual report on intra-EU labour mobility', European Commission (DG EMPL), Brussels.

[46] Fries-Tersch, et al. (2017).

[47] Fries-Tersch and Mabilia (2015), '2015 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

Long-term labour mobility, where persons move their residence to a country of which they are not a citizen, *for at least one year*[48], 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[49]. 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 uses data from two sources – Eurostat population statistics and the EU Labour Force Survey (EU-LFS). These estimates are not fully comparable[50].

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 forms of mobility (see box 'definitions' at the beginning of this report) and the key figures are presented in Table 1, point 3.

Posting of workers, where a person that normally carries out his/her activities in one Member State is sent i.e. 'posted' by his/her employer to another Member State to perform work on its behalf for a limited period. It also includes posted self-employed persons – persons 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 also include persons who pursue an activity as an employed/self-employed person in two or more Member States[51].

To prove that they are already affiliated to a social security scheme of a Member State (the one they are posted from), these persons have to ask the social security institution of the country from which they are sent, for a certificate (portable document A1, PD A1) which they can show to concerned bodies in the destination country. Based on these PD A1 forms, a statistic of posted workers is established. Data on portable documents issued to posted workers are analysed in a separate report[52] and key figures are shown in Table 1, point 4.

Return mobility, where long-term movers return to their country of origin. As there are not exact data available on this phenomenon, it is estimated based on the number of nationals moving *to* their country of nationality (i.e. the number of nationals among inflows).

The main data sources used are Eurostat population and international migration statistics and the European Labour Force Survey (EU-LFS)[53]. Where necessary, the coherence between these sources as well as their comparability over time to measure trends in intra-EU mobility are discussed. Additional data sources are used to tackle the thematic chapters. Below is an overview of the datasets used for specific indicators and analyses:

[48] 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.

[49] Directive 2004/38/EC.

[50] The three main reasons are: (1) EU-LFS statistics generally only cover the population in private households, while population statistics cover the whole population, including those living in collective households (e.g. conscripts in the armed forces); (2) The rules for defining the usual resident population in the EU-LFS at times differ from the rules in population statistics; and (3) Population statistics usually refer to particular dates (January 1 in the case of Eurostat), while EU-LFS statistics generally refer to the average quarterly or annual figures. This is expanded upon in Eurostat (2022), 'Quality report of the European Union Labour Force Survey 2020', Publications Office of the European Union, Luxembourg, pp. 31-32.

[51] See table of definitions for explanation and for further information on the legislative background, see for instance De Wispelaere, et al. (2021).

[52] Ibid.

[53] The OECD's Health Workforce Migration database and DG GROW's database on the recognition of qualifications between Member States are also used for Chapter 3.

- **Flows of movers:** Inflows and outflows of movers to EU Member States are measured based on Eurostat population statistics[54]. In this report, the latest available data are for 2022 (i.e. those who moved in the course of 2022).

- **Stocks of movers:** Headline statistics on the number of movers residing in an EU Member State other than that of their citizenship (the 'stock' of movers) are gathered from Eurostat population statistics[55]. In this report, the latest available data are movers registered on 1 January 2023.

- **Socio-demographic and labour market indicators:** To facilitate this analysis, data from the EU-LFS are used[56]. The latest available data in this report are annual averages for 2023. Eurostat population data lack the detail required to study some demographic aspects of the mover population (e.g. interaction between citizenship of movers *and* country of destination) and do not include labour market indicators.

- **Thematic chapter on the social conditions of movers:** The social conditions of movers are analysed using data from the Eurostat 'Statistics on Income and Living Conditions' (EU-SILC), which offer insights into indicators related to income, social protection, education, and housing.

- **Thematic chapter on mobility in the healthcare sector:** This chapter uses data from the EU-LFS on the stock of EU movers disaggregated by occupations according to the International Standard Classification of Occupations (ISCO), 3-digit level. The OECD database on Health Workforce Migration is also used for data on country of training vs country of practice, and data from the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW) on the number of positive and negative decisions taken on the recognition by one Member State of professional qualifications earned in another Member State.

[54] Eurostat (2024g) and Eurostat (2024h).

[55] Eurostat (2024i), *Population on 1 January by age group, sex and citizenship* [Migr_pop1ctz] [Online]: https://ec.europa.eu/eurostat/databrowser/view/MIGR_POP1CTZ [Accessed 18 March 2024].

[56] Due to differences in measurement and sampling, the total number of movers in the EU-LFS differs from the total found in Eurostat population statistics. Table 1, of the report's key indicators, presents these estimates separately.

1. Recent developments on the mobile working-age population

1.1. Introduction

This chapter provides an overview of the recent developments on working-age movers in the EU/EFTA. The first section focuses on the trends in flows of working-age movers across the EU/EFTA and individual countries, breaking down their composition by gender and age. The second section delves deeper into the overall population of working-age movers (i.e. stock) and investigates their demographic characteristics in the countries of residence. The final section addresses specific categories of working-age movers, including cross-border and posted workers, as well as returnees.

Key findings

Overall trend

- After a decline, due to the COVID-19 pandemic, the rise in labour mobility flows that began in 2021 continued into 2022, slightly surpassing 2019 levels.
- The total number of mobile EU working-age citizens (the 'stock') decreased in 2020 but rebounded in 2023, recovering from the contraction of the previous years.
- The total number of working-age third-country nationals reached nearly 19.5 million in 2023, marking a 34 % increase from approximately 14.5 million in 2018.

Flows of working-age movers

- Based on Eurostat international migration statistics, the inflow of EU movers to EU and EFTA countries increased from 859 000 in 2021 to 976 000 in 2022 (+14 %).
- In contrast, the outflow of EU movers (i.e. non-national EU citizens leaving EU and EFTA countries) decreased from 584 000 in 2021 to 543 000 in 2022 (- 7 %)[57]. The number of nationals leaving their country increased from 821 000 to 866 000 (+5 %).
- Germany and Spain were the countries receiving the largest inflows of EU movers (241 000 and 148 000 respectively) as well as experiencing the largest outflows (165 000[58] and 114 000 respectively).

[57] Values on inflows and outflows are provided by Eurostat on the basis of the data received from Member States. Difference between these figures originate in different registration practices with incoming and outgoing movers, but also in the possibility that incoming persons might not come from their country of nationality, or that parts of these groups fall outside the age-bracket analysed in the report etc. The size of these different factors is impossible to determine.

[58] For the years 2021 and 2022 in Germany only data for all age groups together were available. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

- 57 % of incoming EU movers in the EU and EFTA countries were male. As in previous years, central and eastern European countries such as Latvia, Poland, and Bulgaria had particularly high proportions of incoming male movers. Conversely, only three Member States - Greece, France and Italy - reported more working-age women than men moving into the country.

- 53 % of incoming working-age EU movers were 20-34 years old. This contrasts with the age structure of working-age nationals, of whom only 43 % fall within this age group. The highest proportions of this age group were found in the Netherlands (70 %), Denmark (67 %), and Malta (64 %).

- At the other end of the age spectrum, the highest proportions of older movers (aged 50-64) were observed in Bulgaria (35 %), followed by Hungary (32 %), Croatia (31 %), Italy (24 %) and Romania (23 %).

- The inflow of third-country nationals (from non-EU countries) significantly increased, doubling between 2021 and 2022 to reach 3 324 000 in 2022 (+133 %). This is likely attributed to the Russian aggression against Ukraine[59].

Stock of working-age movers

- The total number of EU citizens living in another country has remained relatively stable over time. At the beginning of 2023 there were ca. 10.1 million working-age movers, an increase of around 2 % compared to 2022, and thereby higher than the average annual growth rate of 1 % since 2018.

- The number of third-country nationals is around 19.5 million and has increased on average by 6 % per year since 2018, with the sharpest rise occurring between 2022 and 2023 (14 %), whereby the Russian invasion of Ukraine has led to a significant influx of individuals fleeing the conflict.

- In line with previous years, Romanians make up the largest share of EU movers (25 %), followed by Polish (12 %) and Italians (9 %).

- With 3.4 million EU movers (34 % of the total), Germany remains the top destination for EU movers in 2023, continuing to lead over other popular destinations such as Spain, Switzerland, and Italy, each hosting over 1 million movers.

- Luxembourg continues to have the highest proportion of EU movers relative to its total population at 40 %, followed by Switzerland at 20 %.

- The gender distribution of EU movers in 2023 remained consistent with previous years, with 51 % of movers being male and 49 % being female. Despite the higher share of men in annual inflows, the constant gender split in the overall stock suggests that men return to their country of origin after a

[59] Eurostat international migration statistics [migr_imm1ctz] report 3 324 000 third-country nationals entering the EU in 2022, reflecting a significant increase from the previous year. While it is not possible to determine the exact share of individuals coming from Ukraine due to limited data from certain countries, it is safe to say that this increase was largely influenced by the Russian aggression against Ukraine. Of the 15 EU Member States that provided specific data, 730 000 Ukrainians were reported to have entered in 2022, a substantial rise from 82 000 in 2021. However, key recipient countries, such as Germany and Poland, did not report specific data for Ukrainian nationals. For more detailed information, please refer to Section 1.2.1.1.

shorter period, resulting in a higher turnover rate among male movers.

- In 2023, 43 % of the working-age EU movers were between 35-49 years old, compared to 34 % of nationals. Together with the fact that there is a considerable share of 20–34-year-old movers (32 %), working-age EU movers are thus relatively young.

Specific categories of working-age movers

- At the end of 2023, there were approximately 1.8 million cross-border workers reported in the EU and EFTA, reflecting a 3 % increase compared to 2022. Similar to previous years, the main countries of origin were France (465 000), Germany (252 000), and Poland (230 000), while the primary destination countries were Germany (406 000) and Switzerland (396 000).

- In 2023, the total number of postings in the EU and EFTA rose to 5.5 million (+19.5 % relative to 2022), distributed among an estimated 3.5 million individual persons (+13 % compared to 2022). This is mainly driven by a significant increase of PDs A1 issued in Germany (+408 000).

- In 2022, an estimated 738 000 movers returned to their countries of origin, marking a 6 % increase from the previous year. Romania and Germany were the largest destinations for returnees, with 102 000 individuals returning to Germany[60].

1.2. The flow of working-age EU movers

In this section, the dynamics of mobile working-age movers between 2017 and 2022 are explored. The analysis includes a comprehensive examination of mobility flows over this six-year period, providing insights into the patterns of mobility as well as a detailed overview of the mobility landscape in 2022, with a focus on inflows and outflows by country[61].

1.2.1. Trends in the flow of working-age EU movers

1.2.1.1. Inflow to the EU and EFTA

The inflows of EU movers into EU/EFTA countries have shown consistency over the years (Figure 1). Between 2017 and 2022, inflows continued at significant levels, despite a notable decline from 953 000 in 2019 to 804 000 in 2020 due to the COVID-19 pandemic and associated travel restrictions[62]. Since 2020, there has been a resurgence in the number of EU movers, with numbers increasing from 859 000 in 2021 to 976 000 in 2022 (14 % increase), underscoring the continued significance of intra-EU mobility.

[60] Section 1.4.3 shows Romania as the main destination for returnees. Since 2022 data for Romania is unavailable and estimated from 2021, Germany, the second major destination, is highlighted instead.

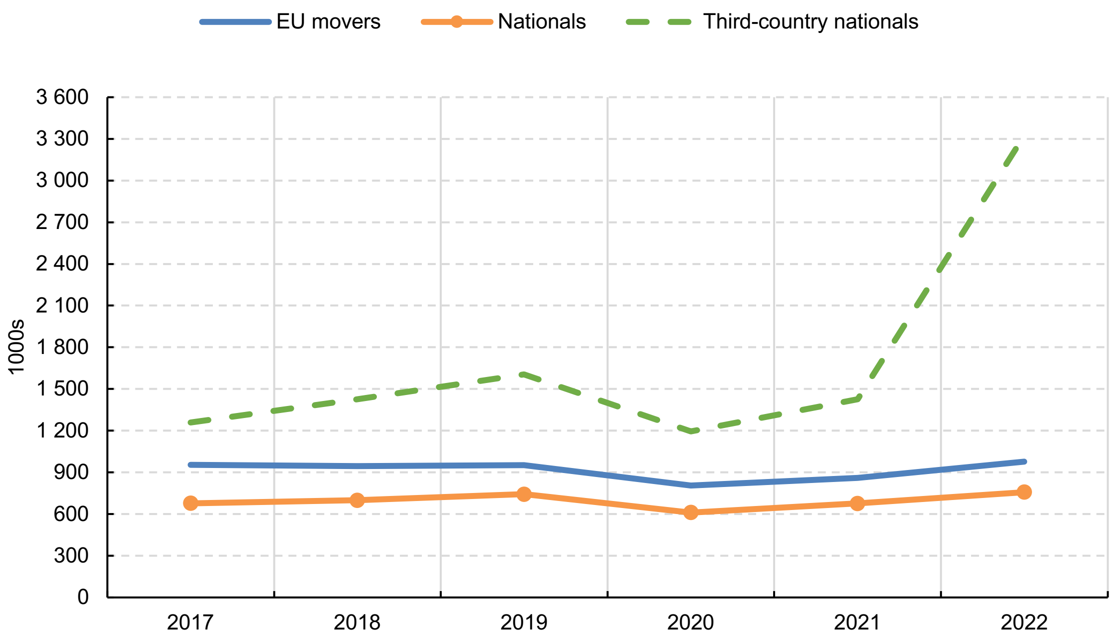
[61] The absolute inflows to all EU and EFTA countries in 2018-2022 are shown in Table 29 (nationals), Table 30 (EU movers) and Table 31 (third-country nationals) in Annex B.1.

[62] It should be noted that the dip in 2020 might also be influenced by Brexit, as the UK nationals were no longer counted in the EU mover category, but rather in the third-country nationals category.

The inflow of nationals (i.e. returnees to their country of citizenship, discussed further in Section 1.4.3) over the same period shows an overall increasing trend, with a temporary dip in 2020. Starting at 677 000 in 2017, the numbers gradually rose, reaching 742 000 in 2019 before experiencing a significant decrease to 611 000 in 2020 due to the pandemic. After this decline, the numbers increased again, reaching 757 000 in 2022, a 12 % increase relative to 2021 and the highest inflow observed between 2017-2022.

The inflow of third-country nationals (TCNs) (i.e. immigrants from non-EU countries) exhibited more notable fluctuations. It rose steadily from 2017 to 2019 from 1 259 000 to 1 606 000. In 2020, the figure dropped to 1 195 000 and increased again to 1 425 000 in 2021 for TCNs arriving in EU/EFTA countries. The largest inflow was, however, experienced in 2022, following the Russian aggression against Ukraine, the number of TCNs arriving in the EU reached 3 324 000 (133 % increase)[63] (see Box 2).

Figure 1: Inflows of movers in the EU and EFTA, 2017-2022



Note: For 2017-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. The dip in the figures for EU movers in 2020 might also be influenced by Brexit, as UK nationals were no longer included in the EU movers category from 2020 but rather in the third-country nationals category. As most Member States do not provide a detailed breakdown of the number of UK movers, it is not possible to quantify exactly how much of the change in 2020 is related to Brexit and how much to COVID-19. EFTA movers are omitted due to the small size of the group. 2021 data used for Romania.

Source: Eurostat international migration statistics (migr_imm1ctz), Milieu calculations

Box 2: Inflows of Ukrainians in the EU and EFTA

The uptick in inflow of TCNs into the EU and EFTA in 2022 was substantial, largely due to the Russian invasion of Ukraine on 24 February 2022. As shown in the table below, there has been an extensive displacement of persons and border crossings since the onset of the war. As of 11 June 2024, Poland hosts a significant number of refugees from Ukraine, totalling 957 505 individuals. Additionally, Poland has experienced extensive border activity, underscoring its role as a primary transit point for refugees.

[63] See https://home-affairs.ec.europa.eu/policies/migration-and-asylum/migration-management/migration-management-welcoming-refugees-ukraine_en [last accessed 21 May 2024].

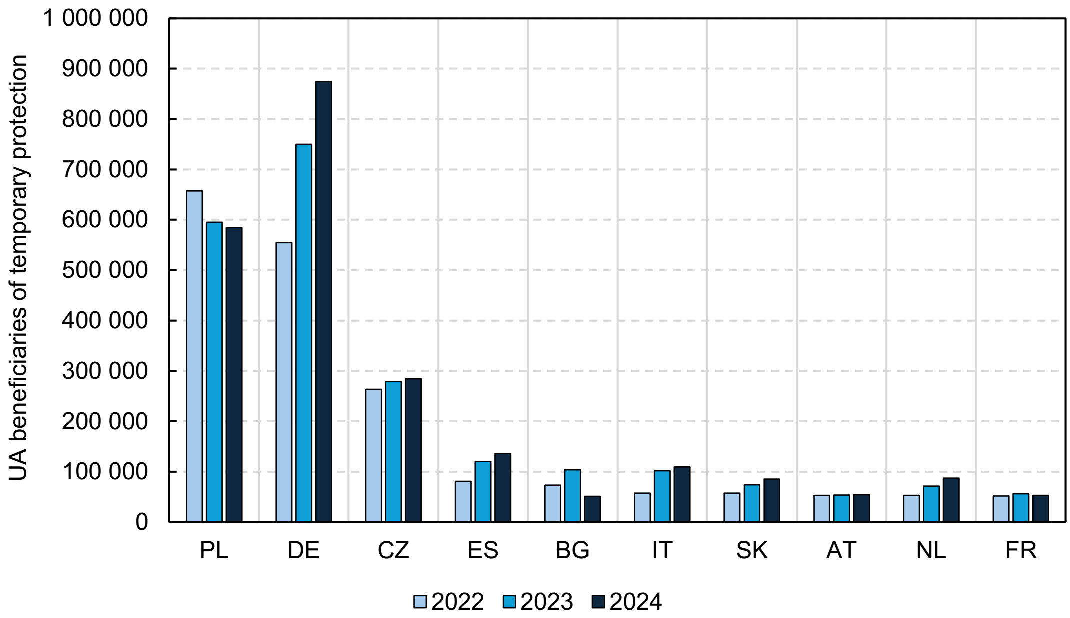
Table 2: Refugees from Ukraine and border crossings since 24 February 2022

MS	Reference date	Refugees from UA in country as of date	Border crossings since 24/02/2022	
			From UA	To UA
PL	11/06/2024	957 505	21 388 745	19 498 565
CZ	02/06/2024	353 510	n/a	n/a
SK	14/07/2024	122 925	2 449 625	2 341 755
RO	07/07/2024	77 900	4 813 410	4 093 810
BG	30/06/2024	62 700	n/a	n/a
HU	15/07/2024	60 620	5 144 255	4 516 230
LV	21/05/2024	48 460	n/a	n/a
LT	05/07/2024	43 905	n/a	n/a
EE	30/06/2024	35 915	n/a	n/a

Source: UNHCR, Ukraine Refugee Situation [last accessed 17 July 2024].

The figure below further shows the number of persons with Ukrainian nationality benefitting from temporary protection[64]. Poland and Germany stand out as the countries with the highest numbers of beneficiaries. Furthermore, for most countries, the number of beneficiaries has generally increased between 2022 and 2024.

Figure 2: Number of beneficiaries of temporary protection with Ukrainian citizenship, 2022-2024



Note: Beneficiaries between 14-64 years of age. Data for 2022 are from March to December 2022. Data for 2024 are until May 2024. Due to data availability, figures for Germany for 2022 are from August to December 2022; for Austria for 2022 are from July to December 2022; for Spain for 2024 are until April 2024.

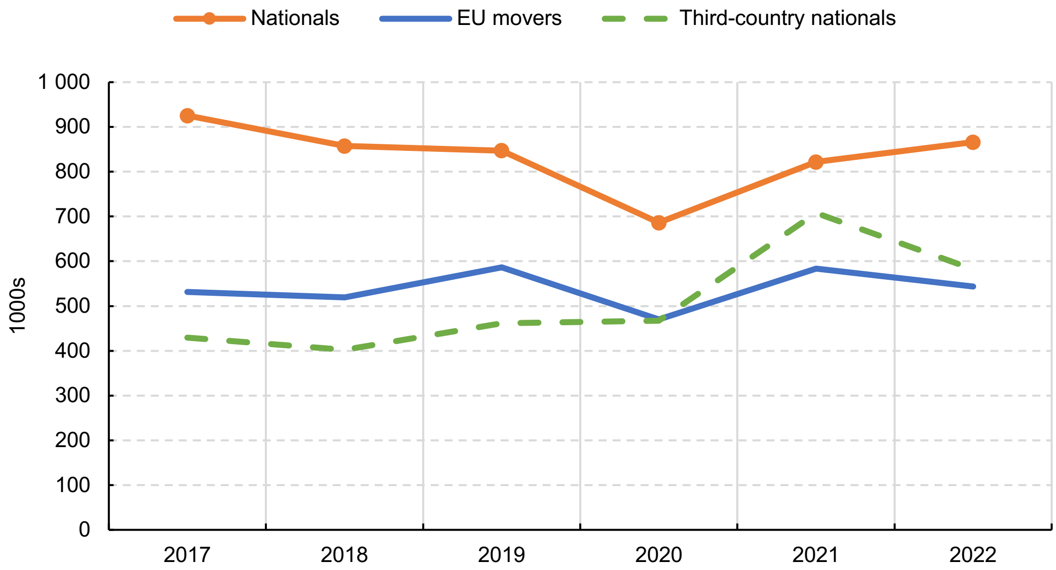
Source: Eurostat, Temporary protection statistics [migr_asytpsm].

1.2.1.2. Outflows from the EU and EFTA

Between 2017 and 2022, the outflows from EU and EFTA countries showed varying patterns for different groups (Figure 3). EU movers experienced fluctuations, with a significant dip in 2020 due to COVID-19, recovering partially by 2021, but then decreasing by 7 % to 543 000 in 2022[65]. Aside from the pandemic year of 2020, the data for nationals exhibited a relatively stable trend. In 2022, there were 866 000 nationals leaving their country, showing a 5 % increase from 2021. The emigration of TCNs peaked significantly in 2021, but decreased by 18 % to 582 000 in 2022, though the 2022 numbers remained higher than in earlier years.

As the outflow data do not specify the exact destinations of these outflows, it is difficult to determine whether these movements entail relocation to other EU Member States or whether they involve individuals leaving the EU altogether.

Figure 3: Outflows of movers in the EU and EFTA, 2017-2022*



Note: Data not available for Greece, France, Cyprus and Portugal. For 2017-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. As most Member States do not provide a detailed breakdown of the number of UK movers, it is not possible to quantify exactly how much of the change in 2020 is related to Brexit and how much to COVID-19. *Due to data limitations figures for some countries have been estimated. Figures for Sweden and Belgium were calculated by taking the average of 2020 and 2022 data. 2021 values used for Romania and Denmark. Only data for all age groups, not the 20-64 age range examined in this report, were available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

Source: Eurostat international migration statistics (Migr_emi1ctz), Milieu calculations.

[64] Temporary protection status is a legal mechanism within the European Union designed to provide immediate and collective protection to individuals fleeing conflicts, persecution, or crises, particularly when traditional asylum systems risk being overwhelmed. More information can be found on the website of the EU Commission: https://home-affairs.ec.europa.eu/policies/migration-and-asylum/common-european-asylum-system/temporary-protection_en.

[65] As already highlighted in Section 1.2.1.1, the dip in 2020 is also influenced by Brexit, as since 2020 UK nationals are no longer counted in the EU movers category but rather in the third-country nationals category.

1.2.1.3. Net mobility in the EU and EFTA

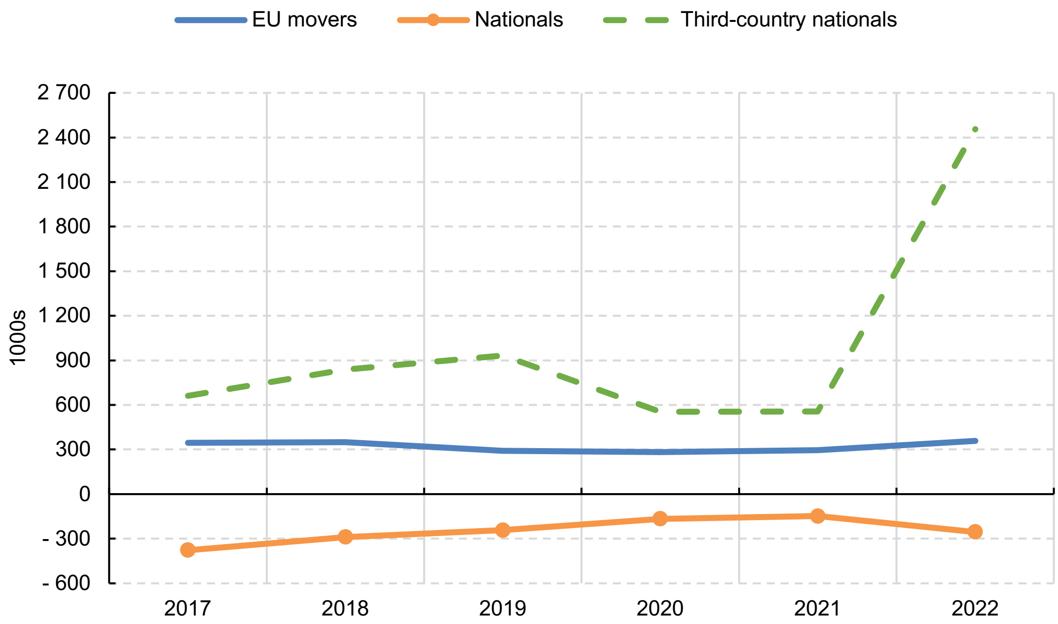
Net mobility refers to the difference between the total number of people moving into a region (inflows) and the total number of people leaving the region (outflows). Positive net mobility indicates that more people are entering the region than leaving, while negative net mobility indicates the opposite.

From 2017 to 2022, EU movers consistently showed positive net mobility (i.e., total inflows higher than total outflows) (Figure 4). Although, there was a slight decline from 346 000 in 2017 to 296 000 in 2021, net mobility increased by 21 % between 2021 and 2022, reaching a peak of 358 000.

In contrast, the net mobility for nationals has been negative across all years (i.e., total inflows lower than total outflows or in other words, more EU citizens left their country of nationality than returned to their country of nationality), starting at -378 000 in 2017 and declining until 2021. This suggests a decreasing rate of outflow or a relative increase in returns, possibly due to fewer attractive opportunities abroad or improved prospects at home. In 2022, 255 000 more left their country of nationality than returned, indicating a renewed interest in opportunities abroad.

Figures for TCNs are particularly striking, with net mobility increasing from 661 000 in 2017 to 2 456 000 in 2022. This represents a 1.9 million increase compared to 2021, when net mobility was at 556 000, and largely reflects the influx of people following the Russian aggression against Ukraine.

Figure 4: Net mobility of movers in the EU and EFTA, 2017-2022*



Note: Data not available for Greece, France, Cyprus and Portugal. For 2016-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. *Due to data limitations figures for some countries have been estimated. Outflows figures for Sweden and Belgium were calculated by taking the average of 2020 and 2022 data. 2021 values used for Romania for outflows and inflows and for Denmark for outflows. Only data for all age groups, not the 20-64 age range examined in this report, was available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

Source: Eurostat international migration statistics (Migr_imm1ctz, Migr_emi1ctz), Milieu calculations.

1.2.2. Flows and characteristics of working-age EU movers by country

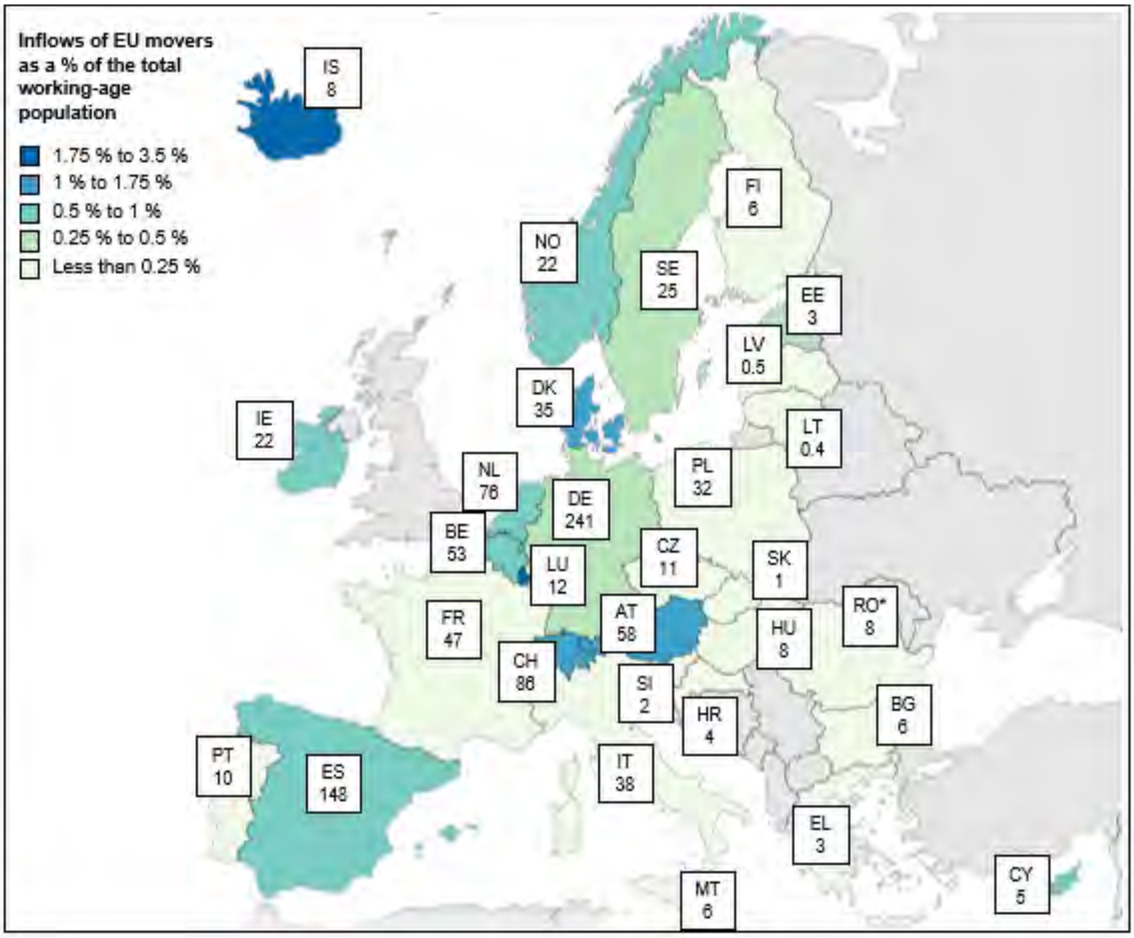
1.2.2.1. Inflows by EU and EFTA country

Figure 5 and Table 3 offer insights on the inflows of EU movers into specific EU and EFTA countries in 2022, both in absolute numbers and relative to the national working-age population. This two-pronged approach reveals the preferred destinations for these movers and highlights the countries where their presence carries the most weight.

Similarly to 2021, smaller countries like Iceland (3.3 %) and Luxembourg (2.9 %) were prominent for having the highest percentages of EU movers compared to their national populations also in 2022. This trend was followed by Malta (1.8 %), Switzerland (1.6 %), and Austria (1.1 %).

In terms of absolute numbers, Germany remained the leading destination, attracting 241 000 movers, followed by Spain (148 000), Switzerland (86 000), the Netherlands (76 000), and Austria (58 000). Each of these five key destination countries experienced an increase in the inflow of working-age movers, with Switzerland registering the most significant increase in 2022 compared to the previous year (+25 %). Since 2017, Switzerland, Germany, Spain, and the Netherlands have consistently been the top four destinations for annual inflows, underscoring their persistent appeal to EU movers.

Figure 5: Inflows of EU movers to EU and EFTA countries, 2022



Note: Countries are coloured based on the inflow of EU movers as a proportion of the total population. Labels indicate the Member State and the total inflow of movers in 2022, in 1 000s. Numbers have been rounded to the closest 1 000 (or for those with less than 1 000, to the closest 100). *2021 data used for Romania.

Source: Eurostat international migration statistics (Migr_imm1ctz) and population statistics (Migr_pop1ctz).

Table 3: Inflows of movers by main countries of destination, 2021-2022

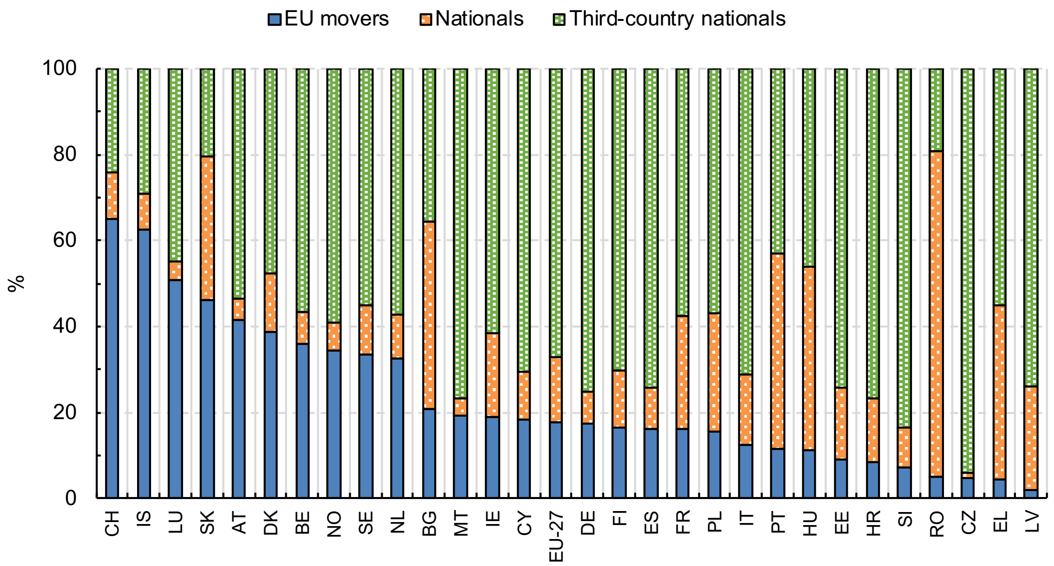
Largest inflows of EU movers in 2022 (percentage compared to 2021 in brackets)			Largest inflows of EU movers as a share of total working-age population in 2022 (pps compared to 2021 in brackets)		
Member State	1 000s	% change	Member State	%	pps change
DE	241	(+2 %)	IS	3.3 %	(+1.2 pps)
ES	148	(+5 %)	LU	2.9 %	(-0.2 pps)
CH	86	(+25 %)	MT	1.8 %	(+0.02 pps)
NL	76	(+6 %)	CH	1.6 %	(+0.3 pps)
AT	58	(+15 %)	AT	1.1 %	(+0.1 pps)

Source: Eurostat international migration and population statistics (Migr_imm1ctz, migr_pop1ctz), Milieu calculations.

Figure 6 shows the overall composition of inflows to EU and EFTA countries in 2022. EU movers make up more than half of the inflows in three countries – Switzerland (65 %), Iceland (63 %) and Luxembourg (51 %) – while they account for less than 5 % of inflows in Romania, Czechia, Greece, Latvia and Lithuania. Some countries, such as Romania (76 %), Portugal (45 %) or Bulgaria (43 %) have a high percentage of their inflows consisting of nationals, indicating a significant return mobility (see further discussion in Section 1.4.3).

Countries like Czechia (94 %), Slovenia (83 %) and Croatia (77 %) saw a notable share of TCNs arriving in 2022. While TCNs already comprised a substantial proportion of inflows to Czechia (75 %) in 2021, this trend was significantly heightened by the inflows of Ukrainian nationals fleeing the war. The inflow of Ukrainian citizens to Czechia increased from 32 000 in 2021 to 308 000 in 2022. In contrast, the high figures of incoming TCNs in Slovenia and Croatia represent a longer-term trend rather than being significantly influenced by the Ukrainian conflict. Other countries experiencing a notable increase in their share of TCNs between 2021 and 2022 are Estonia (+31 pps), Malta (+28 pps), Germany (+28 pps), Latvia (+27 pps), Lithuania (+25 pps), Norway (+25 pps), Ireland (+24 pps) and Portugal (+24 pps).

Figure 6: Composition of inflows of movers to EU and EFTA countries, 2022



Note: EFTA movers excluded due to low numbers. 2021 data used for Romania.

Source: Eurostat international migration statistics (Migr_imm1ctz), Milieu calculations.

1.2.2.2. Outflows by EU and EFTA country

Table 4 provides insights into the outflows of EU movers from main EU and EFTA countries of destination in 2022, both in absolute terms and as a proportion of the national working-age population.

Similar to 2021, in 2022 relatively smaller countries, such as Luxembourg (2.1 %), Malta (1.2 %), Iceland and Switzerland (1 % each), stand out for having the highest proportions of EU movers leaving their territories relative to their national populations. Austria (0.6 %) also had a notable percentage of outgoing EU movers. In absolute figures, the most substantial outflows of EU movers in 2022 were documented in Germany (165 000), Spain (114 000) and Switzerland (52 000). Thereby, for 2021 and 2022 Germany, Switzerland, Ireland and Poland only reported data for all age groups (0 to 65+), not the 20-64 age range examined in this report. To estimate the missing data, the average proportion of individuals aged 20-64 was calculated based on the 2017-2020 data and applied to the total outflows for 2021 and 2022. Furthermore, for Romania and Denmark figures are from 2021, as data for 2022 were not available, whereas Greece, France, Cyprus and Portugal did not report data on the outflows of EU movers over an extended period.

Table 4: Outflows of movers from main countries of destination, 2021-2022*

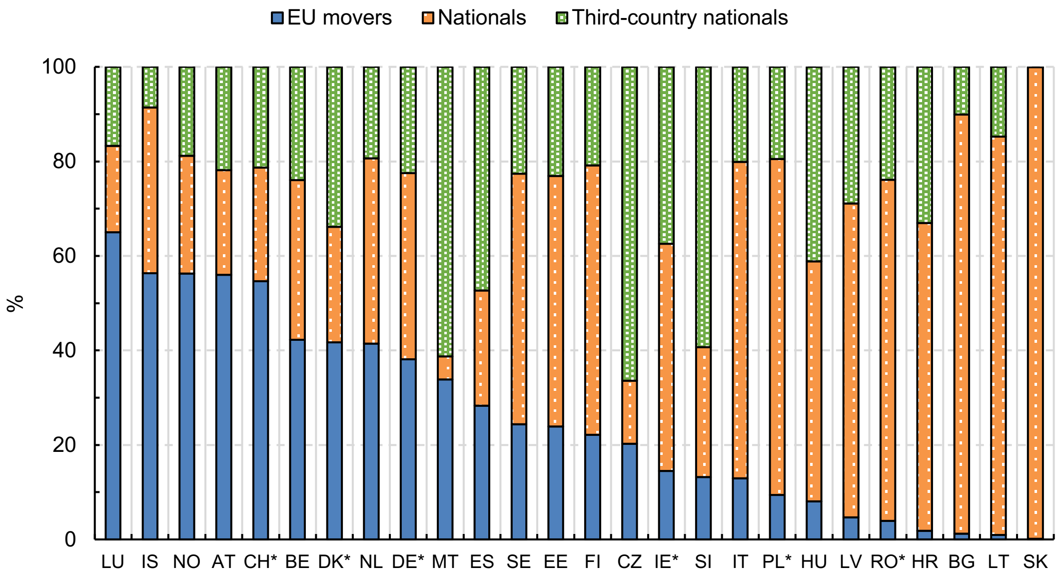
Largest outflows of EU movers in 2022 (or latest available year) (percentage compared to 2021 in brackets)			Largest outflows of EU movers as a share of total working-age population in 2022 (or latest available year) (% compared to 2021 in brackets)		
Member State	**1 000s**	**% change**	**Member State**	**%**	**pps change**
DE*	165	(-4 %)	**LU**	2.1 %	(+0.1 pps)
ES	114	(-18 %)	**MT**	1.2 %	(-0.1 pps)
CH*	52	(+7 %)	**IS**	1.0 %	(-0.1 pps)
NL	35	(-2 %)	**CH**	1.0 %	(+0.1 pps)
AT	32	(+5 %)	**AT**	0.6 %	-

Note: *For Germany and Switzerland only data for all age groups, not the 20-64 age range examined in this report, were available for the years of 2021 and 2022. *Due to data limitations figures for some countries have been estimated. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022. The same approach was used to estimate data for Ireland and Poland. Data not available for Cyprus, France, Greece, and Portugal. The sign "-" represents no change.

Source: Eurostat international migration and population statistics (Migr_emi1ctz, migr_pop1ctz), Milieu calculations.

Luxembourg, Iceland, and Norway, along with Austria and Switzerland, exhibit a high proportion of EU movers in their outflows, with shares exceeding 50 % (Figure 7). In contrast, Slovakia, Lithuania, Bulgaria, Romania, and Poland have a significant share of their own nationals among their outflows (above 70 %). Other countries, such as Czechia and Malta, predominantly see TCNs among their emigrants (above 60 %).

Figure 7: Composition of outflows of movers from EU and EFTA countries, 2022*



Note: Data not available for France, Greece, Cyprus and Portugal. 2021 data used for Romania and Denmark. *Due to data limitations figures for some countries have been estimated. Only data for all age groups, not the 20-64 age range examined in this report, were available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022. Estimated data is indicated by an asterisk next to the label. No EU-27 average is provided due to these missing data, which would substantially affect its accuracy.

Source: Eurostat international migration statistics (Migr_emi1ctz), Milieu calculations.

1.2.2.3. Net mobility by EU and EFTA country

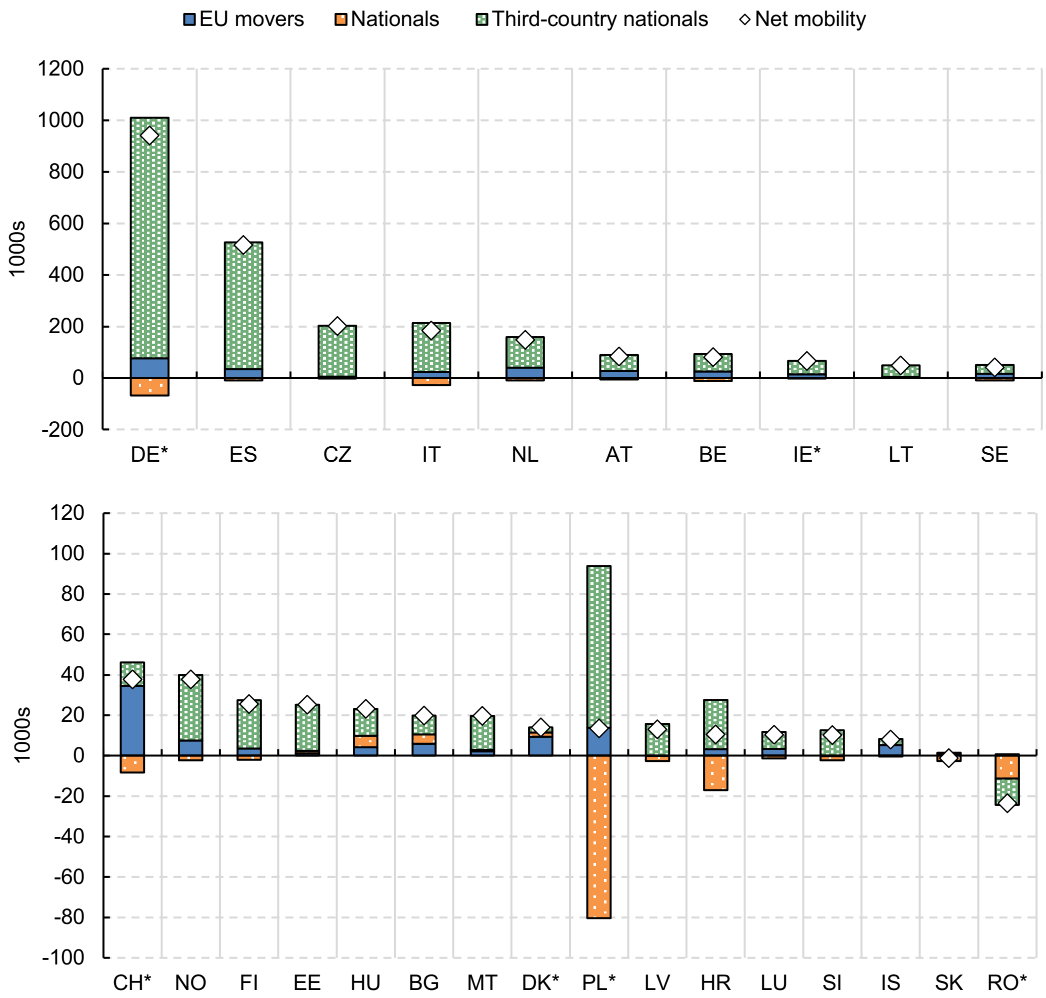
Looking at the combined effects of mobility and migration, in 2022, similarly to 2021, Germany and Spain were the largest net destination countries, recording net mobility/migration flows of 941 000 and 516 000, respectively (Figure 8). This was followed by Czechia, which shifted from a net mobility of -24 000 in 2021 to 202 000. The shift in net mobility in Czechia was mostly influenced by a large inflow of Ukrainians as highlighted in Section 1.2.1.1. Italy (185 000) and the Netherlands (148 000) also had relatively high net mobility levels. Poland had a positive net mobility of movers, resulting from net inward mobility of non-Polish EU citizens, a substantial net inflow of TCNs due to the war in Ukraine[66], and an almost similar net-outward mobility of nationals.[67] Romania and Slovakia were the only countries with negative overall mobility, recording -24 000 and -1 200 respectively.

Focusing on EU movers, Germany (76 000), the Netherlands (41 000), and Switzerland (35 000) had the highest net inflows.

[66] See https://www.eib.org/en/stories/ukrainian-poland-infrastructure-refugees [last accessed 21 May 2024].

[67] Polakowski, M., & Szelewa, D. (2016). Poland in the migration chain: causes and consequences. Transfer: European Review of Labour and Research, 22(2), 207-218. https://doi.org/10.1177/1024258916636581.

Figure 8: Net mobility of movers by EU and EFTA countries, 2022*



Note: Data not available for France, Greece, Cyprus and Portugal. 2021 data used for Romania for outflows and inflows and Denmark for outflows. *Due to data limitations figures for some countries have been estimated. Only data for all age groups, not the 20-64 age range examined in this report, were available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022. Estimated data is indicated by an asterisk next to the label.
Source: Eurostat international migration and population statistics (Migr_imm1ctz, Migr_emi1ctz), Milieu calculations.

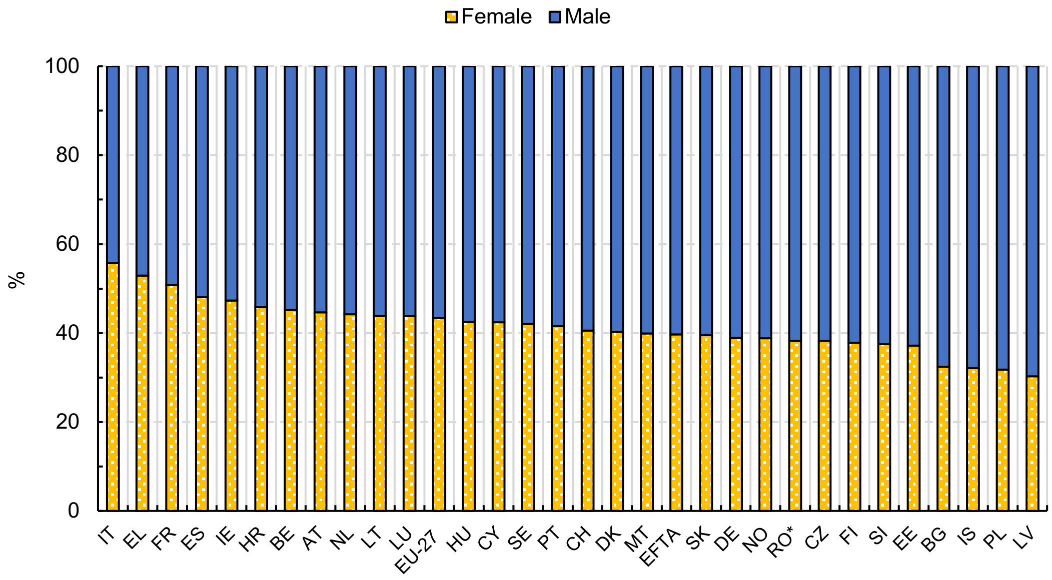
1.2.2.4. Inflows by EU and EFTA country and by gender and age group

Analysing the gender distribution of EU movers within EU and EFTA countries in 2022 shows that there were no significant changes from the previous year (Figure 9). The ratio of male to female movers in 2022 was 57 % male to 43 % female, closely resembling the 58 % to 42 % ratio observed in 2021. This gender split reflects the typical employment sectors for EU movers such as manufacturing, construction, and wholesale and retail trade, which are generally dominated by males (as elaborated upon in Section 2.3.2).

Similarly to 2021, countries such as Latvia (70 %), Poland (68 %), Iceland (68 %), and Bulgaria (68 %) have the highest proportions of male EU movers. This trend can be explained by occupational patterns and economic factors that favour traditionally male-dominated industries. For instance, the share of workers in manufacturing, construction, wholesale and retail trade, and transportation and storage – sectors typically dominated by men – is on average 2-4 percentage points higher in these countries compared to the EU average[68].

Female movers constitute more than 50 % of total inflows in only three countries: Italy (56 %), Greece (53 %), and France (51 %). This can be attributed to the sectoral structure of these countries, which have higher employment in female-dominated sectors such as accommodation and food services, and human health and social work[69]. For instance, in Italy's domestic sector, there is a high and growing demand for domestic workers, particularly caregivers[70]. This demand is largely met by EU movers, primarily from eastern and central Europe, who constitute around 70 % of domestic workers and are predominantly women (89 %). Due to the high incidence of irregularities and undeclared work – estimated to affect over 50 % of domestic work cases – this workforce is likely underrepresented in official labour statistics[71].

Figure 9: Inflows of EU movers to EU and EFTA countries by gender, 2022[72]



Note: 2021 values used for Romania, as indicated by the asterisk.
Source: Eurostat international migration statistics (Migr_imm1ctz), Milieu calculations.

Overall, in the EU the majority of inflows (53 % or 459 000 individuals) are within the 20 to 34-year age range (Figure 10). Around 31 %, representing 270 000 individuals, fall into the 35 to 49-year age group. A smaller portion, 15 % or 131 000 individuals, belong to the 50 to 64-year age category. This demographic composition aligns with that of 2020 and 2021, indicating that younger individuals, who are in the early stages of their careers, exhibit a higher propensity to relocate to another EU or EFTA country.

[68] Eurostat labour force survey statistics [LFSA_EGAN2] [last accessed 21 May 2024].

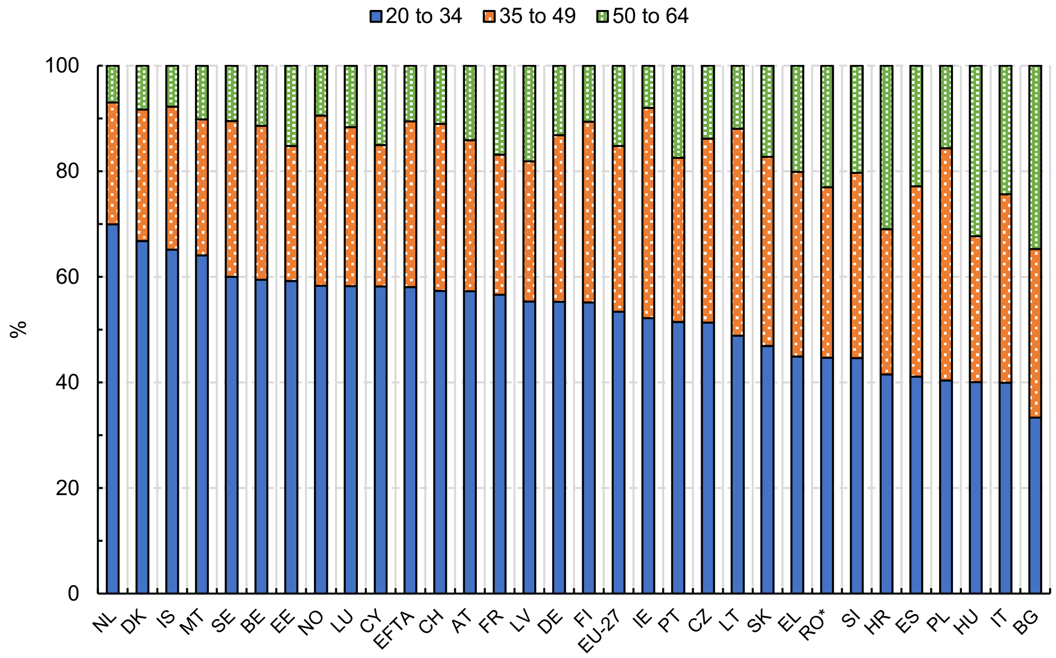
[69] In 2022, the share of workers in Accommodation and Food Services was 2-4 percentage points higher in these countries than the EU average, and the share in Human Health and Social Work in France was 3 percentage points higher. Eurostat labour force survey statistics [LFSA_EGAN2] [last accessed 21 May 2024].

[70] The ageing of population in Italy results in an increase in the demand from private households for domestic workers, and especially (live-in) caregivers. International Labour Organization (ILO) (2021), *Making Decent Work a Reality for Domestic Workers. Progress and Prospects Ten Years After the Adoption of the Domestic Workers Convention, 2011 (No. 189).*

[71] DOMINA National Observatory on Domestic Work (2020), '2nd Annual Report on Domestic work', 2020 Edition.

[72] The absolute numbers and percentages of inflows of EU movers to all EU and EFTA countries by gender in 2021-2022 are shown in Table 20 in Annex B.1.

Figure 10: Inflows of EU movers to EU and EFTA countries by age group, 2022[73]



Note: 2021 values used for Romania, as indicated by the asterisk.
Source: Eurostat international migration statistics (Migr_imm1ctz), Milieu calculations.

Similarly to 2021, in the Netherlands the highest proportion of movers is aged 20 to 34 (70 %), followed by Denmark (67 %), Iceland (65 %), and Malta (64 %). In contrast, the highest percentages of EU movers aged 50-64 are found in some central and southern European Member States. Bulgaria leads with 35 %, followed by Hungary (32 %), Croatia (31 %), Italy (24 %), and Romania (23 %). This pattern may be associated with low overall inflow numbers and return mobility, where individuals return to their home country with a partner of a different nationality.

Box 3: Comparing mobility of working-age and non-working age EU citizens

This chapter focuses on working-age movers, specifically those aged 20-64., which constitute the majority of inflows in all EU and EFTA countries. Indeed, at EU level, there were 193 000 (18 %) movers aged 0-19, 860 000 (78 %) working-age movers, and only 43 000 (4 %) movers aged 65 and older. The highest proportion of young movers (aged 0-19) is found in Greece (33 %), followed by Cyprus (29 %) and France (25 %). The countries with the highest proportion of movers aged 65 and older are Croatia (14 %), Bulgaria (12 %), and Hungary (10 %).

1.3. The total number of working-age EU movers

This section discusses the patterns in the overall population of movers (from here on referred to as the 'stock' of movers) within the EU/EFTA and in individual countries. The section primarily addresses EU movers and, to a lesser extent, TCNs. It explores the

[73] The absolute numbers and percentages of inflows of EU movers to all EU and EFTA countries in 2021-2022 by age group are shown in Table 21 in Annex B.1.

general trends, followed by an analysis of demographic characteristics such as gender, nationality, and age.

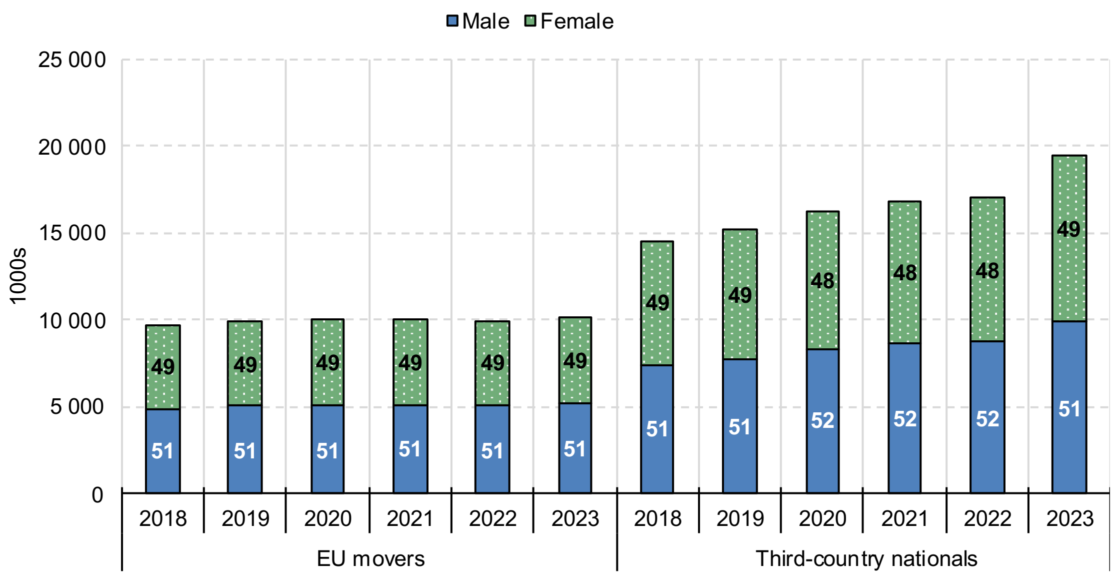
1.3.1. Trends in the total number and structure of working-age EU movers

At the beginning of 2023, there were approximately 10.1 million working-age EU movers and 19.5 million working-age TCNs in the EU (Figure 11). The stock of movers with EFTA nationality was around 155 500[74]. Between 2018 and 2020 the number of EU movers rose, peaking in 2020. This upward trend slowed down in 2021, eventually leading to a decline of 1 % in 2022[75]. A rebound occurred in 2023 with a growth of almost 2 %, recovering from the previous year's contraction.

In contrast, the number of TCNs increased at an average rate of 4 % per year between 2018 and 2022, and of 14 % between 2022 and 2023. This sharp increase is attributed to the Russian invasion of Ukraine, which led to a significant influx of individuals fleeing the war.

The gender distribution among EU mobile workers and TCNs in the EU was relatively stable over the period from 2018 to 2023 (Figure 11). By 2023, there were approximately 5.2 million male and nearly 5 million female EU mobile workers and around 9.9 million male and 9.5 million female TCNs residing in the EU. This points towards a gender balance in mobility, with both male and female populations actively moving.

Figure 11: Stock of movers in the EU by gender, 2018-2023[76]



Note*:* Data labels indicate the nationality group as a share (%) of all in that group. EU-28 values used in 2016, as well as for Germany (2017-2019), Cyprus, Greece, France, Croatia, Malta, and Poland (2017-2020). For Romania, as 2022 data were not available, an average between the 2021 and 2023 values has been calculated.

Source: Eurostat [migr_pop1ctz], Milieu calculations.

[74] Due to the small size of the group, EFTA movers have been omitted from Figure 11.

[75] The COVID-19 pandemic has had an impact on the growth of the stock of EU movers, leading to stagnation between 2020 and 2021 and a slight decrease between 2021 to 2022 (by a little bit less than 1 %).

[76] The absolute numbers and percentages of stocks of EU movers and third-country nationals by gender in 2018-2023 are shown in Table 22 in Annex B.1.

The age distribution of EU movers indicates a shift towards an older mobile EU population, with the younger cohort (20-34 years old) shrinking (decreasing 3 pps between 2018 and 2023), and the oldest cohort (50-64 years old) expanding both in real terms and relative to the total (increasing 3 pps over the same timespan) (Table 5). This could be reflective of broader societal trends in age structure within the EU. However, the ageing of EU movers is somewhat faster.

Table 5: Stock of movers in the EU by age group, 2018-2023 (1 000s)

Age group	2018	2019	2020	2021	2022	2023
20 - 34 years	3 456 (36 %)	3 494 (35 %)	3 449 (34 %)	3 388 (34 %)	3 313 (33 %)	3 346 (33 %)
35 - 49 years	3 903 (40 %)	3 981 (40 %)	4 023 (40 %)	4 042 (40 %)	4 017 (40 %)	4 052 (40 %)
50 - 64 years	2 342 (24 %)	2 455 (25 %)	2 553 (25 %)	2 595 (26 %)	2 638 (26 %)	2 724 (27 %)
Total	**9 700**	**9 930**	**10 025**	**10 025**	**9 968**	**10 122**

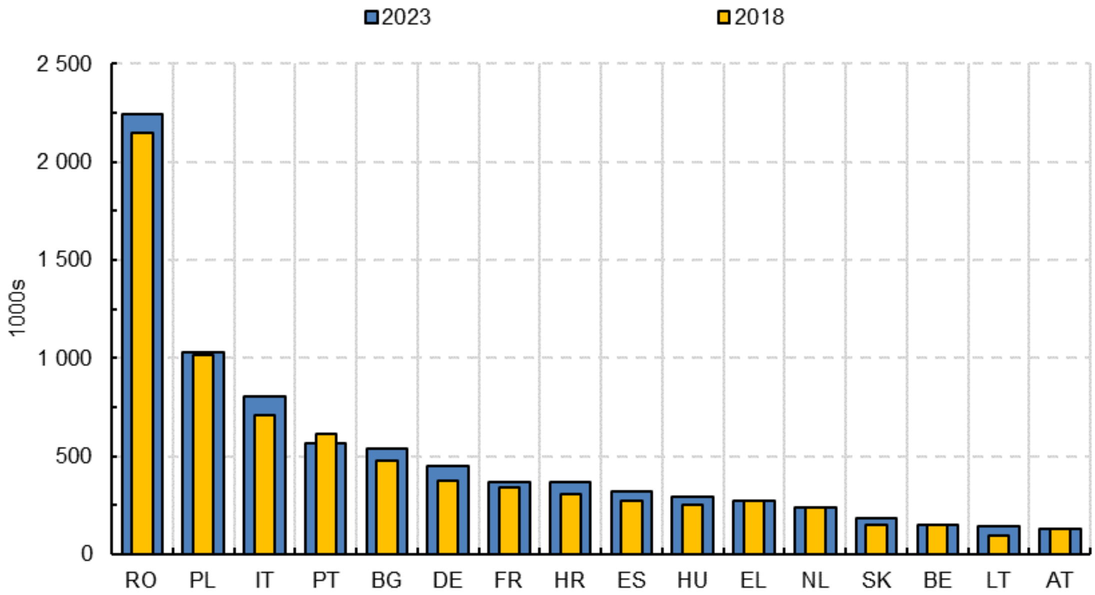
Note*:* Percentages in brackets indicate the size of the age group as a percentage of all EU movers. EU-28 values used in 2016, as well as for Germany (2017-2019), Cyprus, Greece, France, Croatia, Malta, and Poland (2017-2020). For Romania, as 2022 data was not available, an average between the 2021 and 2023 values has been calculated.

Source: Eurostat [migr_pop1ctz], Milieu calculations.

Throughout the period 2018-2023, movers from Romania (25 %), Poland (12 %), and Italy (9 %) consistently represented the largest groups of working-age EU movers. (Figure 12)[77].

[77] Due to data limitations, EU-LFS data are used for national disaggregation instead of Eurostat population data. In 2023, almost 25 % of the total number of EU mobile citizens were Romanian citizens (in the LFS estimate, this percentage corresponds to 2.2 million). Approximately 12 % of movers came from Poland (LFS: 1 million), and 9 % originated from Italy (LFS: about 803 000 movers).

Figure 12: Stock of movers in the EU by nationality, 2019-2023



Note*:* Only countries with at least 100 000 movers in 2023 are displayed in the chart.

Source: EU-LFS 2024, custom extraction by Milieu.

1.3.2. Numbers and characteristics of working-age EU movers by country

This section starts with identifying the key destination countries for EU movers, examining their representation in the total working-age population of those countries. It then analyses gender and age breakdowns for each country where data are available.

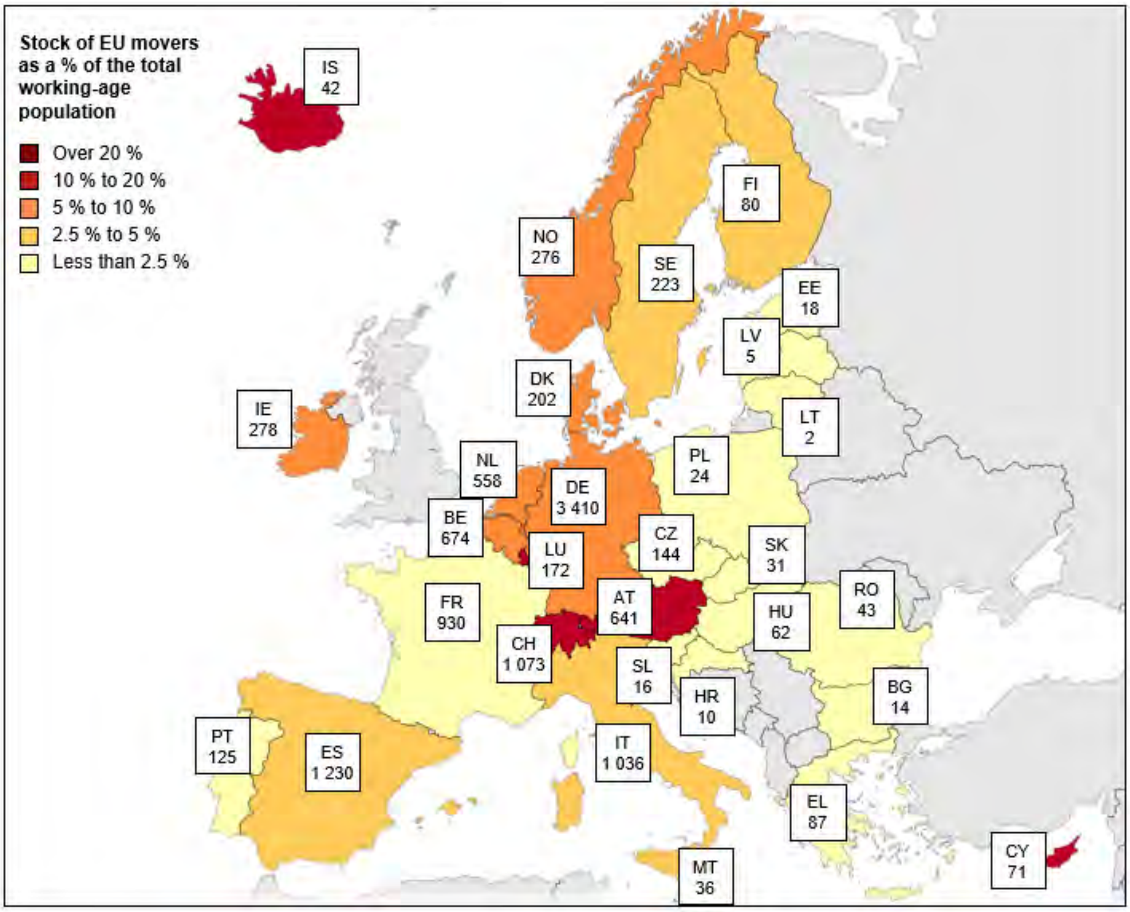
1.3.2.1. Main countries of destination for EU movers

Figure 13 and Table 6 provide an overview of the stocks of EU movers in individual EU and EFTA countries in 2023, both in absolute terms and as a percentage of the national working-age population, shedding light on the actual and relative magnitude of the phenomenon in different countries.

Germany was the largest country of destination in the EU and EFTA, with around 3.4 million EU movers, outnumbering those in other popular destinations like Spain, Switzerland and Italy, all of which have over 1 million movers each. In contrast, Lithuania, Latvia, and Croatia have the smallest populations of EU movers, each hosting fewer than 10 000.

As a share of the total working-age population, the presence of EU movers is quite low in Bulgaria, Croatia, Latvia, Lithuania, Poland and Romania with movers in these countries accounting for less than 0.5 % of the total EU working-age population. Luxembourg has an exceptionally high proportion of EU mobile workers, making up 40 % of its working-age population, 20 pps higher than the second-highest, Switzerland (20 %). A significant presence is also observed in Iceland (18 %), Cyprus (12 %), and Austria (12 %), where EU movers constitute a substantial segment of the working-age population.

Figure 13: Stock of working-age EU movers in the EU and EFTA countries (1 000s and %), 2023[78]



Note: Countries are coloured based on the proportion of the total working-age population that is made up of EU movers. Labels indicate Member State and the total number of movers on 1 January 2023, in 1 000s. Numbers have been rounded to the closest 1 000.

Source: Eurostat population statistics [Migr_pop1ctz], Milieu calculations.

Table 6: Stock of movers by main countries of destination, 2022-2023

Largest stocks of EU movers in 2023 (percentage compared to 2022 in brackets)			Largest stocks of EU movers as a share of total working-age population in 2023 (% compared to 2022 in brackets)		
Member State	**1 000s**	**% change**	**Member State**	**%**	**pps change**
DE	3 410	(+1.5 %)	**LU**	40 %	(-0.9 pps)
ES	1 230	(-3.9 %)	**CH**	20 %	(+0.5 pps)
CH	1 073	(+3 %)	**IS**	18 %	(+1.7 pps)

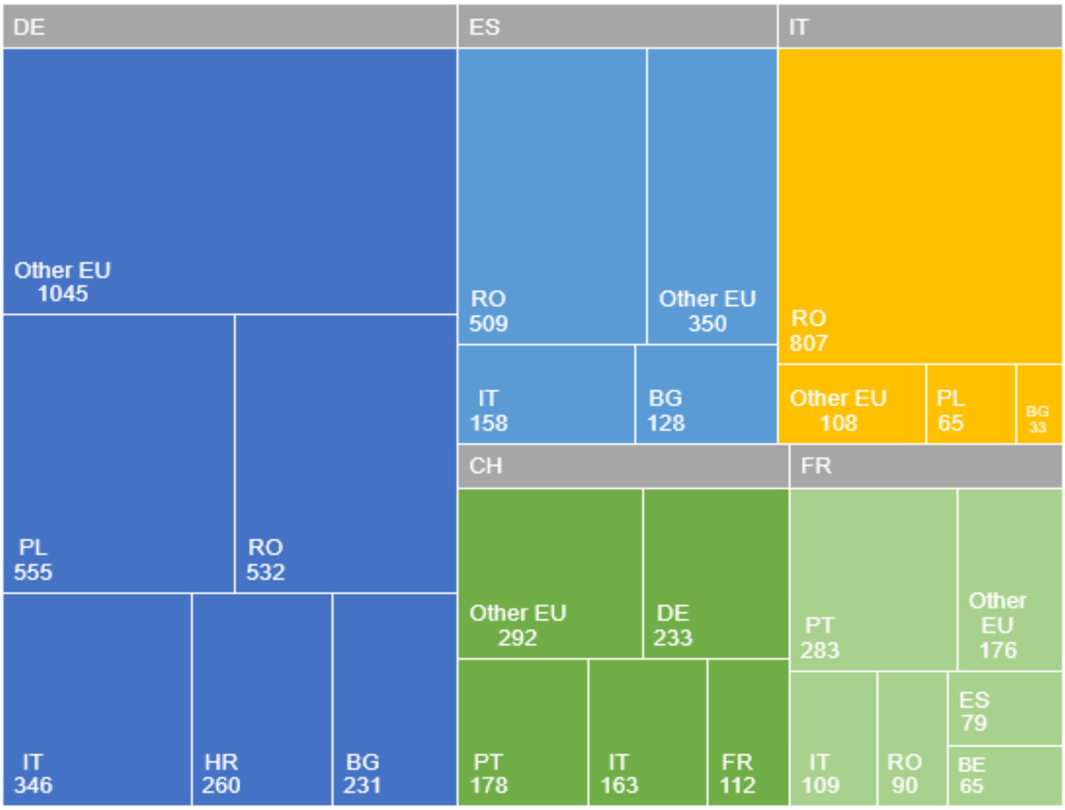
[78] The total population on 1 January of EU movers in EU and EFTA countries in 2018-2023 are shown in Table 23 in Annex B.1.

Largest stocks of EU movers in 2023 (percentage compared to 2022 in brackets)			Largest stocks of EU movers as a share of total working-age population in 2023 (% compared to 2022 in brackets)		
Member State	**1 000s**	**% change**	**Member State**	**%**	**pps change**
IT	1 036	(-0.1 %)	**CY**	12 %	(-0.6 pps)
FR	930	(+4 %)	**AT**	12 %	(+0.4 pps)

Source: Eurostat population statistics (Migr_pop1ctz, migr_pop1ctz), Milieu calculations.

Figure 14 shows the main countries of origin for movers (coloured boxes) in the top five countries of destination (grey boxes)[79]. Germany and Switzerland showcase a diverse range of origins among their EU movers, with no single nationality dominating. In fact, Germany has a significant number of EU movers from Poland (19 % of EU movers in Germany) and Romania (18 %), while in Switzerland 52 % of movers come from the neighbouring countries of Germany, France and Italy. In contrast, countries like Spain, Italy and France have a more concentrated distribution, with one nationality being notably predominant. Notably, Romanians make up the largest group in Italy (80 %) and Spain (52 %), while Portuguese citizens are the most significant group in France (35 %).

Figure 14: Stock of movers in the main countries of destination by citizenship (1 000s), 2023

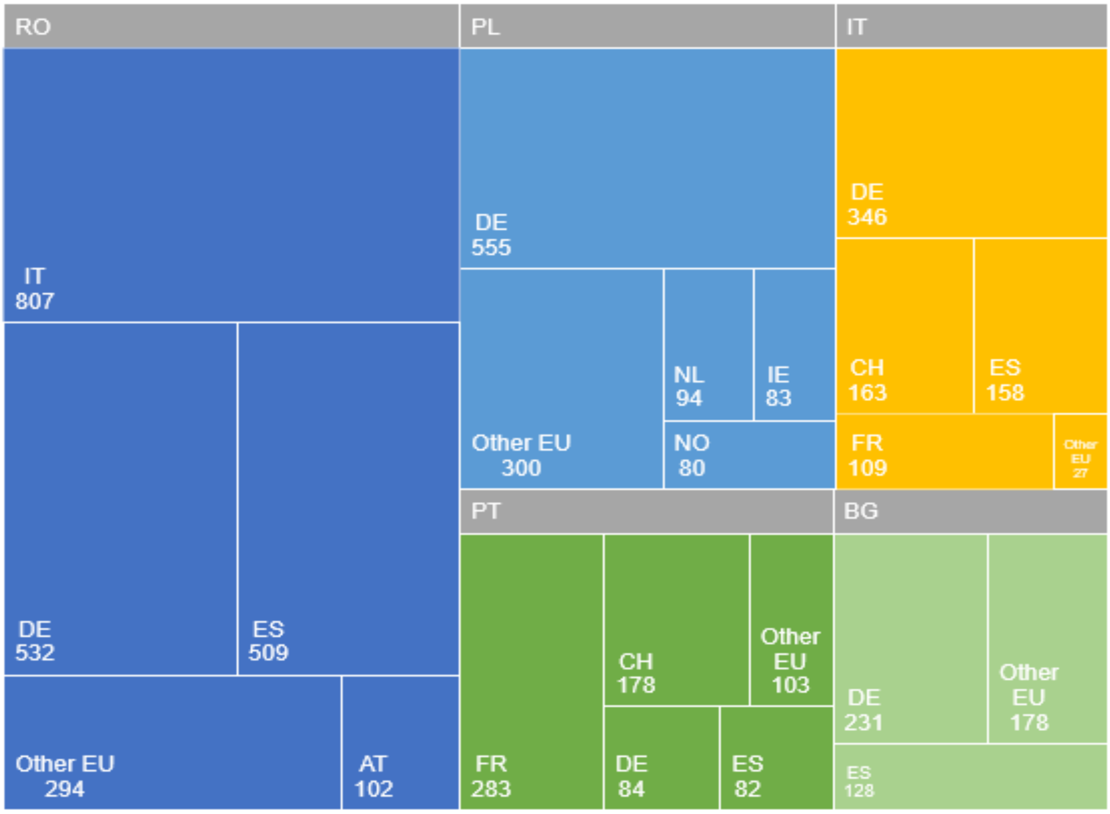


Source: EU-LFS 2024, custom extraction by MIlieu

[79] As this level of detail is not available in Eurostat population statistics, data from the EU-LFS is used. Therefore, the total number of movers displayed in Figure 13 and Figure 14 may differ from estimates based on Eurostat population statistics.

On the flip side, looking at the main countries of destination for movers from the five largest countries of origin reveals a strong preference for Germany (Figure 15). As in previous years, Germany remains the most popular destination of movers from Poland (54 % of Polish movers go to Germany), Bulgaria (43 %) and Italy (43 %). It is the second most popular destination for movers from Romania (23 %), with Italy remaining the top choice for Romanian movers. Spain is the second most popular country of destination for Bulgarian movers (24 %) and the third one for Italians (20 %) and Romanians (23 %).

Figure 15: Stock of movers from the main countries of origin by country of destination (1 000s), 2023

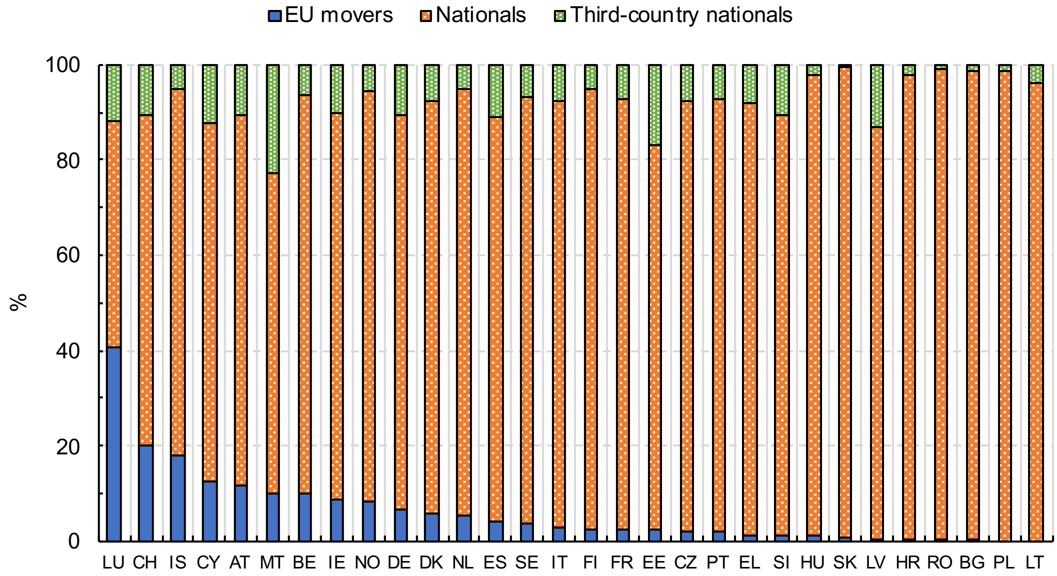


Source: EU-LFS 2024, custom extraction by Milieu

In 2023, the shares of EU movers, nationals and TCNs remained relatively stable (Figure 16)[80]. Luxembourg, Switzerland, Cyprus and Austria have not only high shares of EU movers, but also report significant proportions of TCNs, indicating a broader international working-age population. At the other end of the spectrum, Bulgaria, Croatia, Poland, Romania and Slovakia show a rather homogeneous working-age population, mostly composed of nationals. While the war in Ukraine significantly impacted migration flows, its effect on the overall stock of migrants remained limited.

[80] Due to its comparatively small size, EFTA movers are excluded from this visualisation.

Figure 16: Share of EU movers, nationals and TCNs in total working-age population of EU and EFTA countries, 2023[81]



Note: EFTA movers make up less than 1 % of the working-age population in all EU and EFTA countries and have therefore been omitted from the chart.

Source: Eurostat population statistics (Migr_pop1ctz), Milieu calculations.

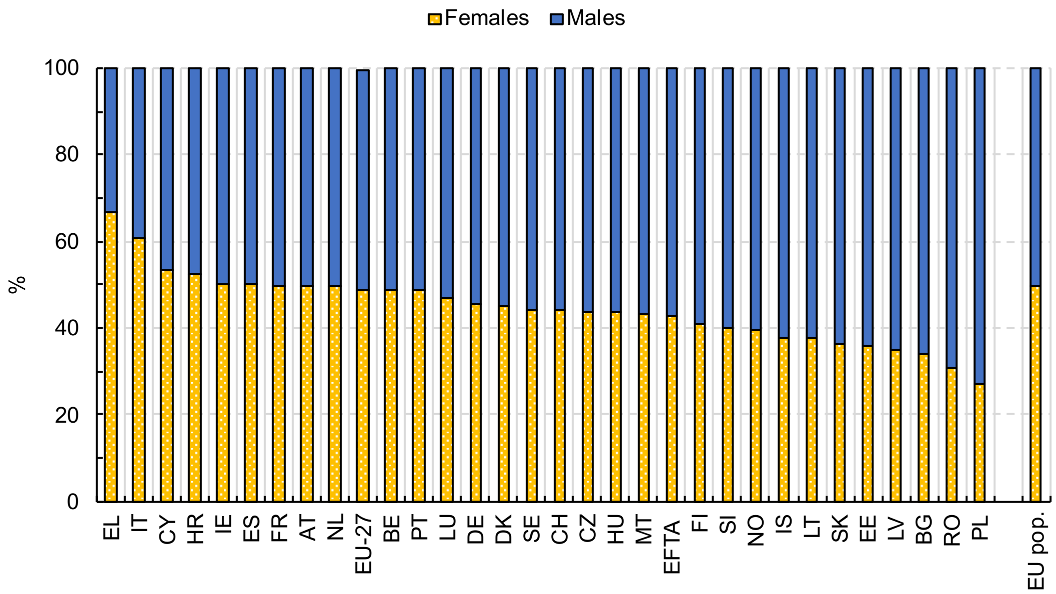
1.3.2.2. EU movers by country, gender and age group

While overall EU working-age movers show equal shares of men and women, in some countries significant gender imbalances are observed (Figure 17). Notably, in Poland (73 %), Romania (69 %), and Bulgaria (66 %) male movers constitute over two-thirds of the mobile population. Countries such as Ireland, Spain, France, the Netherlands and Austria exhibit a more balanced gender composition, closely mirroring the almost even overall gender distribution within the EU population. At the other end, Croatia (52 %), Cyprus (54 %), Italy (61 %), and notably Greece (67 %) have a higher proportion of female movers, with Greece presenting the most significant female majority. The EFTA region shows a lean towards male movers (57 %).

Countries where sectors such as manufacturing, construction, transportation, fisheries, heavy industry play an important role in the economy, as in central-eastern Europe or nordic countries, tend to have a higher share of male EU movers. Meanwhile, countries where service-related industries are more prevalent, such as in Greece, Croatia,Italy and Cyprus generally have higher female representation.

[81] Stock of EU movers and third-country nationals in all EU and EFTA countries (both absolute numbers and as a share of total working-age population) in 2022-2023 are shown in Table 24 in Annex B.1.

Figure 17: Stock of movers in EU and EFTA countries by gender, 2023[82]



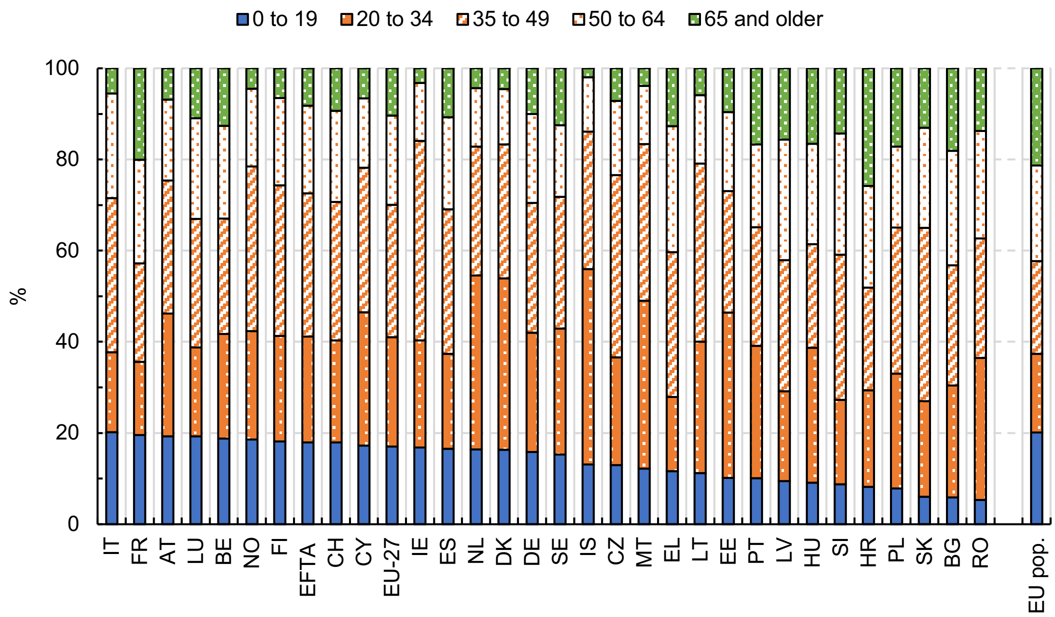
Source: Eurostat population statistics (Migr_pop1ctz), Milieu calculations.

When considering the age distribution of EU movers across countries of residence, all countries reported a higher percentage of movers that were working-age compared to the general EU population, where the percentage of working-age individuals is 59 % (Figure 18). This is particularly notable among the 34-49 and 20-34 age cohorts (except in France and Greece for the latter).

The highest percentage of working-age individuals among all movers is found in Iceland (85 %), Malta (84 %) and Lithuania (83 %), while the lowest shares are found in France (60 %), Croatia (66 %) and Belgium (69 %). France (20 %) and Italy (20 %) are the countries with the highest share of EU movers aged 0-19, while Romania (5 %) and Bulgaria (6 %) are the countries with the lowest share of EU movers in the same age cohort. When it comes to the age group 65 and older, Croatia (26 %) has the largest proportion of movers in this category, followed by France (20 %) and Bulgaria (18 %).

[82] The absolute numbers and percentages of stocks of EU movers by gender in all EU and EFTA countries in 2022-2023 are shown in Table 25 in Annex B.1.

Figure 18: Stock of movers (all ages) in EU and EFTA countries by age group, 2023[83]



Source: Eurostat population statistics (Migr_pop1ctz), Milieu calculations.

1.4. Specific categories of working-age movers

This section puts the spotlight on specific categories of working-age mobility, namely cross-border workers, posted workers, and returnees.

1.4.1. Cross-border workers

Cross-border workers are individuals who live in one EU or EFTA country but are employed in another. This group includes various sub-categories: frontier workers (those who live in border regions and regularly commute to work across the border), seasonal or short-term mobile workers (who temporarily live in the country of employment for a few months each year while keeping their permanent residence in their home country), and workers who live in one country but telework for an employer in another country[84]. Due to limitations in the data, this section examines cross-border workers in general (entailing mainly frontier workers).

In 2023, there were approximately 1.8 million cross-border workers in the EU (Table 7). This is an increase of 3 % in comparison to 2022. Similar to 2022, the biggest group of cross-border EU workers resided in France (465 000), of which around 11 % (48 000) were EU movers and 1.3 % EFTA movers.

[83] The absolute numbers and percentages of stocks of EU movers and third-country nationals by age group in all EU and EFTA countries in 2022-2023 are shown in Table 26 in Annex B.1.

[84] As explained in the previous edition of this report, teleworking opportunities for cross-border workers may currently be limited. However, their growing prevalence has the potential to influence how we conceptualise and measure cross-border work. In the context of this report, cross-border work is defined as residing in one EU/EFTA country while being employed in another. It is thus important to acknowledge that this definition may encompass a segment of the teleworking population. As remote working becomes more common, the lines between traditional cross-border work and teleworking can blur.

Table 7: Cross-border workers by nationality group and country of residence in the EU and EFTA (1 000s), 2023[85]

Country of origin	Nationals	EU movers	Total
EU-27	1 600	233	**1 833**
FR	411	48 *+ (6 000) EFTA movers*	**465**
DE	182	69	**252**
PL	230	-	**230**
IT	117	(3)	**120**
RO	113	-	**113**
BE	72	38	**111**
HU	93	(3)	**97**
CZ	60	(3)	**63**
AT	28	21	**49**
SE	36	10	**46**
ES	37	8	**45**
SK	39	-	**39**
HR	33	-	**33**
NL	18	7	**25**
SI	23	(2)	**25**

Note: Cross-border workers are defined as those workers who live in one EU or EFTA country but are employed in another.
Only countries with at least 20 000 cross-border workers are shown in the table above for reasons of data reliability. Numbers in brackets indicate low reliability. The dash sign "-" indicates no data.

Source: EU-LFS 2024, custom extraction by Milieu.

Similar to 2021 and 2022, Germany, France and Poland remained the largest countries of origin for cross-border workers in 2023 (Table 8). Nearly half of the cross-border workers from France work in EFTA countries, highlighting the significant number of cross-border workers heading to Switzerland. Germany and Switzerland remain the top destination countries, with 406 000 and 396 000 cross-border workers, respectively. In Luxembourg, cross-border EU workers make up 47 % of the total workforce, primarily

[85] The distribution of cross-border workers by country of origin and destination is shown in Table 32 in Annex B.1

coming from France, Germany, and Belgium. This emphasises the substantial impact of cross-border labour mobility on Luxembourg's economy.

Table 8: Main countries of origin and destination for cross-border workers in the EU and EFTA (1 000s), 2023

Main countries of origin					Main countries of destination		
Member State	**To EU-27**	**To EFTA**	**Total**	**% of workforce**	**Member State**	**Total**	**% of workforce**
FR	249	216	465	1.8 %	**DE**	406	1 %
DE	185	66	252	0.7 %	**CH**	396	9 %
PL	205	24	230	1.4 %	**LU**	243	47 %
IT	33	86	120	0.5 %	**AT**	174	4 %
RO	113	-	113	1.5 %	**NL**	124	1.4 %
BE	111	-	111	2.4 %	**BE**	107	2.3 %
HU	97	-	97	2.2 %	**FR**	55	0.2 %
CZ	62	1	63	1.3 %			

Note: Only Member States with at least 50 000 cross-border workers (either incoming or outgoing) are shown. The dash sign "-" indicates no data.

Source: EU-LFS 2024, custom extraction by Milieu.

1.4.2. Posted workers

A 'posted worker' is an employee who is sent by their employer to another EU Member State on a temporary basis to carry out work in some form. It can include both posted employees and posted self-employed persons[86]. The postings of workers within the EU are mainly tracked (1) by counting the Portable Document A1 forms (PDs A1) that are issued by Member States in a given year and (2) through available data from prior declaration tools of each Member State[87]. However, not all postings are consistently reported and there is no uniform approach to collecting these statistics across Member States, which presents a challenge in terms of data comparability.

In 2023, a total of 5.5 million PDs A1 were issued at the request of employers or the individuals concerned, marking a 19.5 % increase relative to 2022. This follows an increase of 27 % in 2021/22. The majority, 3.6 million, were issued under Article 12 (approximately 2 million persons), while 1.7 million were issued under Article 13

[86] This can for instance be in the context of a regular employment relationship contract of services, an intra-group posting or a hiring out through a temporary agency. For more information, cf. European Commission (2022d), *Posted workers* [Online]. Brussels: European Commission (DG EMPL). Available online: https://ec.europa.eu/social/main.jsp?catId=471 [Accessed 24 August 2023].

[87] De Wispelaere, F., De Smedt, L. & Pacolet, J. (forthcoming), 'Posting of workers – Report on A1 Portable Documents issued, HIVA - KU Leuven, Leuven.

(approximately 1.5 million persons)[88]. An additional 253 000 PDs A1 were issued for other categories (e.g. Article 16), primarily for civil servants. The estimated number of individual persons to whom the PDs A1 were issued increased to 3.5 million (+13 % compared to 2022)[89]. Consequently, each person was posted on average 1.6 times.

Notably, Germany and Poland have consistently issued the most PDs A1, with Germany overtaking Poland as the leading issuer since 2019. In 2023, Germany issued over 2 million PDs A1 for the first time, marking an increase of 408 000 compared to 2022 (+25 %). Poland also saw an increase of nearly 127 000 PDs A1 during the same period (+18 %), reaching 850 000 PDs A1 in 2023. Together Germany and Poland account for over 50 % of the total PDs A1 issued in 2023.

Most Member States (22 in total) recorded an increase in PDs A1 issued in 2023, with Finland experiencing the most significant percentage growth at 143 %. However, other countries, including Denmark, Estonia, Spain and Croatia saw a decline in the number of PDs A1 issued in 2023 compared to 2022[90].

1.4.3. Return mobility and returnees in the EU

Movers who relocate back to their home country are engaged in 'return mobility' and are known as 'returnees'. This group reflects the temporary nature of mobility. Overall, return mobility increased between 2021 and 2022 by 6 % (from 656 000 to 738 000, Table 9), exceeding the pre-pandemic levels of 2019.

The increase in return mobility between 2021 and 2022 is particularly notable in Poland, with a 100 % rise in the number of returnees. Poland's improving economic conditions, (GDP growth of 5.3 % in 2022)[91] as well as the expansion of professional opportunities, bolstered by the presence of major tech companies like Google, Microsoft, and Nvidia, along with lower living costs, may have contributed to this[92]. However, it is important to note that return mobility figures in Poland were already at comparable levels in 2018 and 2019, suggesting a potential element of post-pandemic catch-up rather than a purely new trend.

Other countries with a high share of mobile workers show significant return mobility, suggesting increased attractiveness in the medium term. Spain, Italy and Portugal, for example, all recorded stable or rising return mobility, with Portugal experiencing a significant increase of 38 % between 2021 and 2022. Improving economic conditions and better employment opportunities in these countries are likely to have contributed to this trend.

Conversely, Bulgaria, which has been identified as one of the top five countries of origin, has experienced a decline in return mobility since 2020, with a 16 % decrease observed between 2021 and 2022. This reduction in return mobility may be attributed to persistent economic challenges and limited professional opportunities, compounded by the lack of effective policies aimed at attracting and reintegrating returnees. This situation is

[88] Posted workers include: 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 and 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 of Regulation (EC) No 883/2004); and such persons who pursue an activity as an employed/self-employed person in two or more Member States (Art.13). See "posted workers" in the definitions table at the onset of this report.

[89] De Wispelaere, F., et al. (forthcoming).

[90] The total number of PDs A1 issued by sending Member State in 2018-2022 are shown in Annex B.1.

[91] See: https://www.worldbank.org/en/country/poland/overview#3 [last accessed 21 May 2024].

[92] PolskieRadio (2023), 'Polish expats returning home in 'reverse brain drain' : report.'

particularly problematic given that return mobility has consistently lagged behind outflows since 2012, except during the pandemic year. Bulgaria is grappling with a significant demographic crisis and return mobility could be a possible solution[93].

Table 9: Returning nationals for the largest countries of return (1 000s), 2018-2022[94]

	2018	2019	2020	2021	2022	2021/2022 Change (%)	Trend
EU-27	678	721	589	698	738	6	
RO*	118	136	92	119	119	0	
DE	108	115	108	111	102	-8	
ES	52	53	34	88	88	0	
FR	89	89	56	69	77	11	
PL	54	50	34	29	57	100	
IT	31	46	37	50	49	-3	
PT	16	20	18	29	40	38	
HU	30	30	29	28	33	18	
EL	23	24	15	20	26	31	
NL	29	30	29	25	24	-2	
IE	23	16	24	25	22	-11	
LT	14	18	18	18	15	-17	
CH	16	16	17	14	14	0	
BG	11	16	18	15	12	-16	
DK	13	13	13	11	12	12	
BE	12	12	12	12	11	-8	
SE	11	10	10	9	9	-5	

Note: 2021 data used for RO in 2022, as indicated by the asterisk. Dots in the trend lines indicate the highest and lowest values in the reference period.

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

[93] Staykova, E. (2023), 'Return migration in Bulgaria: A policy context of missed opportunities', Österreichische Gesellschaft für Europapolitik (ÖGfE) Policy Brief, [online] Available at: https://www.oegfe.at/policy-briefs/return-migration-in-bulgaria-a-policy-context-of-missed-opportunities/?lang=en [Accessed 29 July 2024].

[94] The number of returnees is shown annually for 2018-2022 for each country in Table 27 in Annex B.1.

2. The labour market integration of mobile workers

2.1. Introduction

This chapter focuses on the integration of EU movers and TCNs into the labour markets of EU and EFTA countries. First, it provides key figures and trends on the participation of movers at both EU and national level, shedding light on rates of activity, employment, unemployment, and self-employment. This includes an analysis of contractual and working time arrangements, such as part-time work and time-limited contracts. A second section of the chapter assesses how activity, employment and unemployment levels vary depending on demographic (i.e. country of origin, gender, age) and socio-economic (i.e. education level, occupation, economic sector) factors.

Key findings

Overall trends

- In 2023, the activity and employment rates for nationals, EU movers, and TCNs continued their upward trends, reflecting consistent recovery and growth in the labour market.
- EU movers have a higher activity and employment rate – by a small margin – than nationals. TCNs have, like in previous years, significantly lower employment and activity rates than both movers and nationals. Unemployment is highest among TCNs and lowest among nationals.
- Following an increase in 2022, the share of self-employed EU movers fell in 2023 below the levels observed for TCNs. Meanwhile, nationals have consistently maintained a higher and relatively steady level of self-employment throughout the years.
- EU movers and TCNs work more frequently on fixed-term and on part-time contracts compared to nationals. However, these rates have been slowly declining over time for all groups.

Participation of movers in the labour market

- At the EU level, 83 % of EU movers were active on the labour market in 2023, compared to 81 % of nationals and 72 % of TCNs. For movers, this is similar to the rate in 2022, with a slight absolute increase of ca. 200 000 (from ca. 7 million to ca. 7.2 million individuals).
- In 2023, EU movers have an employment rate of 78 %, higher than nationals (76 %) and TCNs (63 %). Between 2020-2023, EU movers experienced the most substantial increase (+6 pps), followed by TCNs (+4 pps) and nationals (+3 pps).
- The unemployment rate of EU movers remained constant at 7 %. This is higher than nationals (5 %) but lower than TCNs (12 %). Since the increase of unemployment in 2020 due to the COVID-19 pandemic, unemployment rates

among all three groups have been decreasing, with TCNs experiencing the largest decrease (-5 pps).

- There are 510 000 self-employed EU movers in 2023, 10 % less than in 2022 and significantly less than before the COVID-19 pandemic. The share of self-employed movers (8 %) is lower than the share of self-employed nationals (14 %). Self-employed movers are furthermore highly concentrated: 34 % work in construction and 18 % in accommodation and food services.

- In 2023, 14 % of movers and 11 % of nationals had fixed-term employment contracts. TCNs have fixed-term contracts at a significantly higher rate (24 %). A similar pattern, although with smaller differences between groups, is found for the proportion of part-time work. The share of fixed-term and part-time arrangements is slowly declining throughout the years for all nationality groups.

Characteristics of mobile workers in employment

- At the EU level, the gap between the employment rates for female and male movers is slowly decreasing and stands at 14 pps in 2023 (-2 pps since 2018). This is above the gap observed for nationals (9 pps) but below the gap for TCNs (24 pps).

- Female movers are more likely to be employed part-time; 36 % of female movers work part-time compared to 8 % of their male counterparts. This gap is greater than the 20 pps difference observed for nationals. The difference in the prevalence of fixed-term contracts is less pronounced, however, there is still a higher incidence of fixed-term work among female movers compared to their male counterparts.

- EU movers between 35-49 years old have the highest employment rate (83 %), while the 50-64 age cohort has the lowest (70 %). Those aged 20-34 have the highest unemployment rate (8 %). Similar situations are noted for nationals and TCNs.

- The proportion of EU movers with high educational attainment[95] stands at 32 % in 2023, similar to nationals, a 3 pps increase since 2018. The share of EU movers with low education has increased by 3 % since the COVID-19 pandemic year of 2020. In contrast, nationals exhibit a steady decline in low education levels and a consistent increase in high educational attainment. The greatest increase in the share of highly educated individuals was experienced by TCNs (+5 pps in 2018-2023[96]).

- The most common occupation categories among movers are professionals and elementary occupations (18 % each), and service and sales workers (16 %). EU movers are overrepresented compared to nationals in these categories and in the craft and related trades category. The distribution across occupations has generally remained relatively stable over time. An exception are the professionals, whose absolute number has steadily increased since at

[95] As discussed later in this chapter, 'high education' refers to individuals who have attained tertiary education or higher (i.e. university, college or postgraduate education).

[96] It should however be noted that the large inflow of citizens fleeing the war in Ukraine might have biased figures for 2023; the increase in the share of highly educated TCNs between 2018 and 2022 (pre-war) was indeed smaller (+2.8 pps).

least 2018, becoming the most common occupation among EU movers in 2023.

- Looking at sectoral patterns, EU movers are overrepresented compared to nationals in construction (11 % vs 7 %), accommodation and food services (9 % vs 4 %) and administrative and support service activities (8 % vs 4 %). The largest sector of work for movers is manufacturing (16 %), followed by wholesale and retail trade and construction (11 % each). The highest growth between 2018 and 2023 is observed in the information and communication (+47 %) and transportation and storage (+37 %) sectors.

2.2. Participation of movers in the labour market

This section compares and analyses the labour market integration of EU movers and TCNs. This is done over three sub-sections. The first compares activity, employment, and unemployment rates at the EU level from 2018-2023, and in individual countries in 2023. The next sub-section focuses on patterns of self-employment. Finally, the share of each nationality group that is employed either on a fixed-term contract or on a part-time basis is considered.

2.2.1. Activity, employment and unemployment rates

2.2.1.1. Comparison of activity rates

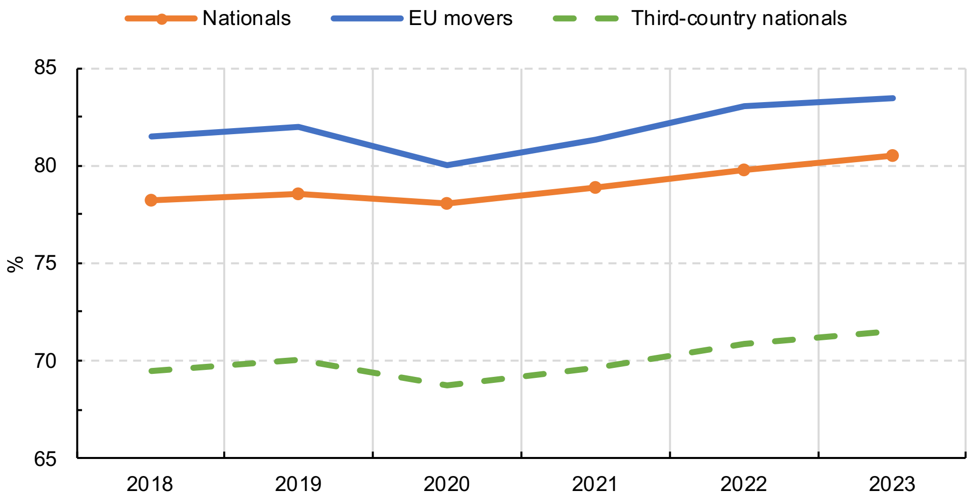
The activity rate[97] of EU movers continued to rise reaching 83 % in 2023, 3 pps higher than the rate of nationals and 11 pps higher than that of TCNs (Figure 19). All three groups demonstrated a strong recovery in activity rates since 2020 (around +3 pps for each group), surpassing their pre-pandemic rates in 2023.

In all but four Member States – Germany, Greece, France and Hungary – EU movers have higher activity rates than nationals (Figure 20). For Germany. France and Hungary those differences are minimal, while for Greece there is a 18 pps gap between the two groups. It should, however, be noted that figures for EU movers in the unemployed category in Greece are marked with low reliability.

TCNs have (significantly) lower activity rates compared to both nationals and EU movers in most countries with the exception of nine Member States (Czechia, Ireland, Italy, Lithuania, Luxembourg, Malta, Poland, Portugal, and Slovenia).

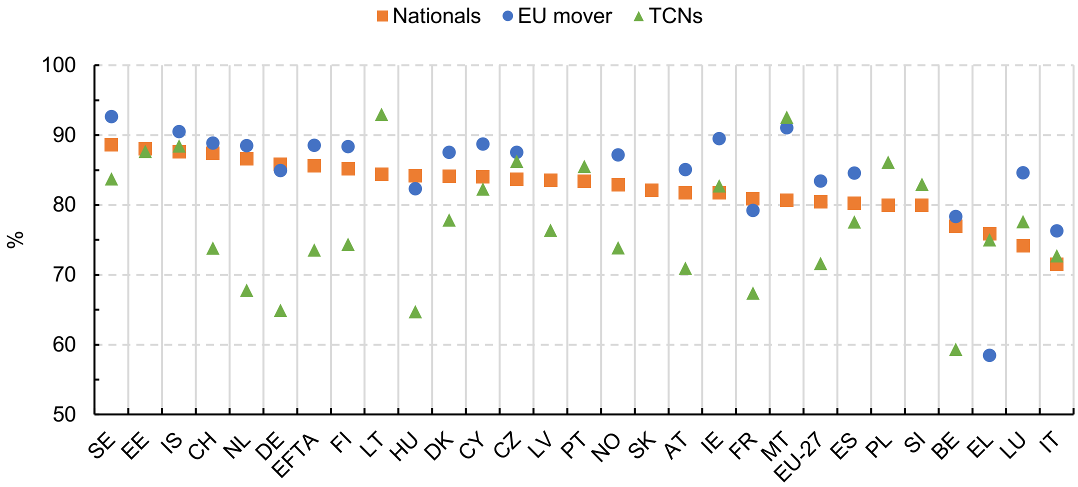
[97] ‘Activity rate’ is to be understood, here and elsewhere in the report, as the proportion of the working-age population that is either employed or unemployed/looking for work. This is to be contrasted with those who are inactive or outside the labour market e.g. retirement, education, or long-term sick leave.

Figure 19: Activity rate of movers in the EU, 2018-2023[98]



Source: EU-LFS 2024, custom extraction by Milieu.

Figure 20: Activity rate of movers in EU and EFTA countries, 2023



Note: Figure only shows Member States where data allowed for a comparison of nationals and at least one other group in line with Eurostat publication thresholds. Low reliability for EU movers for employed in Estonia; for unemployed in Czechia, Greece and Ireland. Low reliability for third-country nationals for inactive in Lithuania; for unemployed in Ireland, Slovenia, and Norway.

Source: EU-LFS 2024, custom extraction by Milieu.

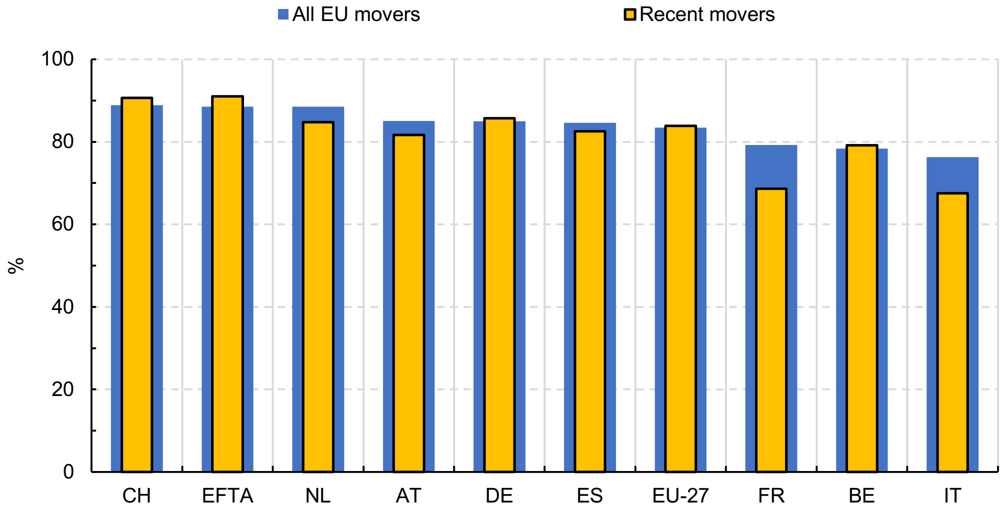
Recent movers (i.e. persons who have spent one year or less in that Member State) have an average activity rate of 83 % (Figure 21)[99]. Switzerland, Germany and Belgium report slightly higher activity rates for recent EU movers than for all EU movers (1-2 pps higher). In the other countries, recent movers have a lower activity rate; however, disparities are generally small. Only in France and Italy, differences appear to be more

[98] Activity rates by nationality group and country of residence in 2018-2023 are shown in Table 33 in Annex B.2.

[99] Figure 21 shows the activity rate of recent EU movers in 2022 and EU movers overall, for the Member States where a comparison was possible. Indeed, Eurostat thresholds mean that sample sizes that are below a certain reliability limit, determined separately for each Member State, cannot be published. The population of recent movers is too small in many Member States to publish, and comparison is therefore not possible with previous years. The sample size has further decreased due to more limited mobility than usual during the COVID-19 pandemic.

significant, with 11 and 9 pps, respectively. For a significant number of countries data on recent movers show low reliability or are missing, which affects the overall accuracy and completeness of these findings.

Figure 21: Activity rate of overall and recent movers in EU and EFTA countries, 2023



Note: 'Recent movers' are defined as those who have spent 1 year or less in the Member State. The figure only shows Member States where data allowed for a comparison of recent movers and movers in line with Eurostat publication thresholds. Low reliability for recent movers for inactive in France and Italy; for unemployed in Germany.

Source: EU-LFS 2024, custom extraction by Milieu.

2.2.1.2. Comparison of employment rates

In 2023, the employment rate of movers reached 78 %, followed by nationals at 76 %, and TCNs at 63 % (Figure 22). The data indicates an upward trend in employment rates for EU movers since 2018, despite a notable dip in 2020 due to the COVID-19 pandemic. Since 2020, EU movers experienced the most substantial increase (+6 pps), followed by TCNs (+4 pps) and nationals (+3 pps).

In most countries, the employment rates of nationals and EU movers are quite similar, with only minor variations (Figure 23). However, in Malta (12 pps), Ireland (8 pps), Luxembourg (10 pps), and Greece (18 pps), EU movers have higher employment rates compared to nationals, while in Greece the opposite is true. Figures overall indicate that EU movers are well integrated into the local labour markets.

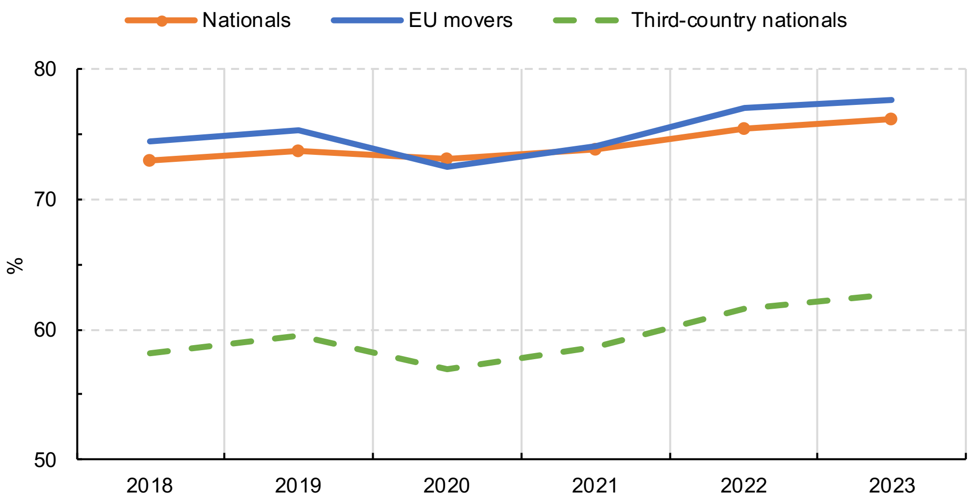
When comparing EU movers to TCNs, the disparities are more pronounced, highlighting the considerable challenges TCNs often face in integration. These differences are particularly significant in Belgium (24 pps), the Netherlands (24 pps), Germany (22 pps), Sweden (21 pps), and Switzerland (19 pps). This disparity can be attributed to factors such as significant language barriers, difficulties in recognising foreign qualifications, and legal and administrative hurdles in obtaining work permits.

Different from the overall gap in the labour market integration of TCNs, TCNs and EU movers have similar employment rates in Iceland, Czechia, and Malta (differences of less than 2 pps) and higher employment rates than nationals in Lithuania (14 pps), Malta (10 pps), Poland (8 pps), and Luxembourg (6 pps). Reasons for the rather high labour market integration of TCNs include their long-term residence in some countries (e.g.

Russian minorities in Baltic countries[100]), specific immigration contexts[101], and the interplay between immigration policies and national legislation[102].

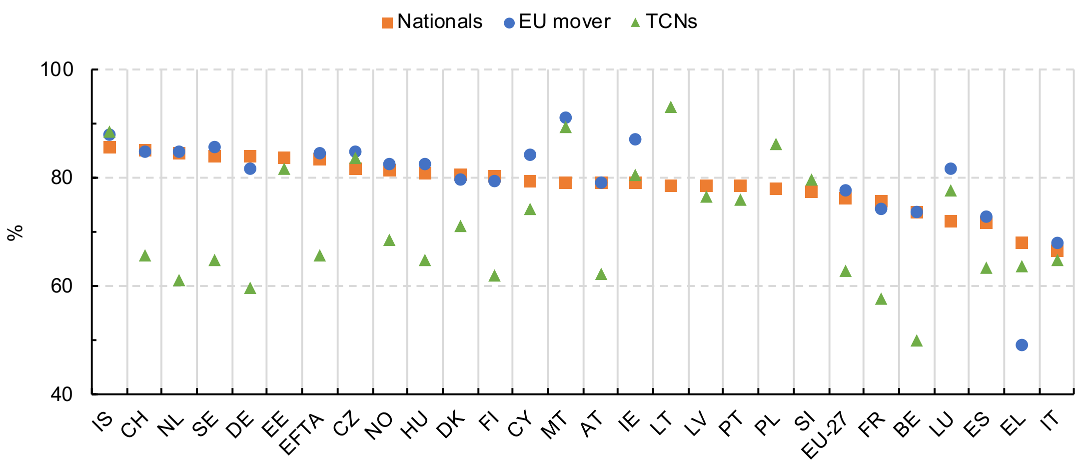
In key EU destinations for people fleeing Ukraine, with available data, employment rates from 2021 to 2022 showed a mixed pattern: some countries experienced a slight decrease, such as Poland (-2 pps) and Hungary (-10 pps), while others saw increases, including Estonia (+6 pps), Lithuania (+3 pps), and Latvia (+4 pps).

Figure 22: Employment rate of movers in the EU, 2018-2023[103]



Source: EU-LFS 2024, custom extraction by Milieu.

Figure 23: Employment rate of movers in EU and EFTA countries, 2023



[100] European Commission (2024b), 'Governance of migrant integration in Estonia', European Website on Integration; European Commission (2024c), 'Governance of migrant integration in Poland', European Website on Integration.

[101] For Malta, it is reported that the large presence of workers from India, the Philippines, and Nepal, primarily employed in the food and accommodation sector, has helped address labour shortages Independent Online (2024), 68 755 third-country-nationals were registered as working in Malta in July 2023, *The Malta Independent*.

[102] In Luxembourg, the Luxembourg Nationality Law does not differentiate between applications introduced by EU citizens and third-country nationals, which may contribute to the higher employment rates of TCNs see: Sommaribas, A., and Petry, R. (2020), *Pathways to citizenship for third-country nationals in Luxembourg,* European Migration Network National Contact Point Luxembourg. European Commission.

[103] Employment rates by nationality group and country of residence in 2018-2023 are shown in Table 34 in Annex B.2.

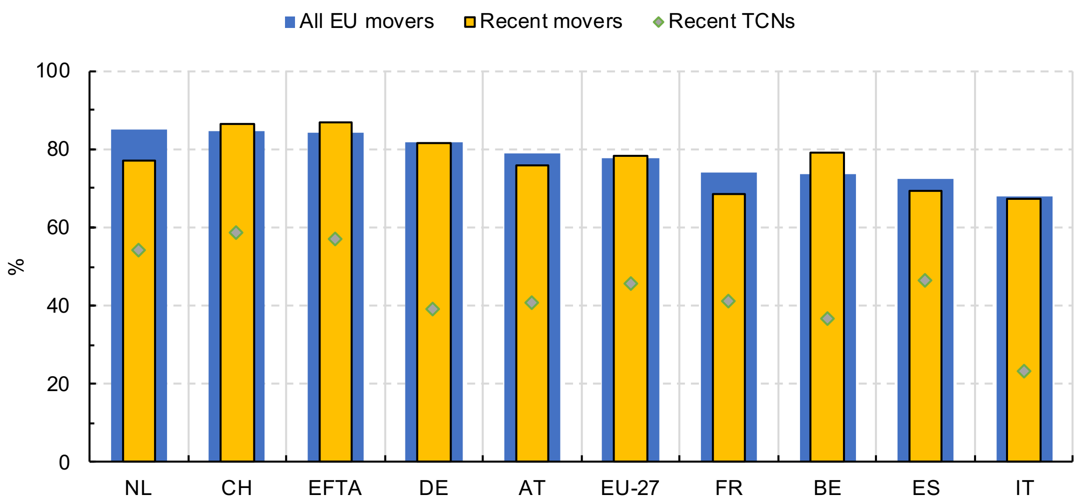
Note: Figure only shows Member States where data allowed for a comparison of nationals and at least one other group in line with Eurostat publication thresholds. Low reliability for EU movers for employed in Estonia; for unemployed in Czechia, Greece and Ireland. Low reliability for TCNs for inactive in Lithuania; for unemployed in Ireland, Slovenia, and Norway.

Source: EU-LFS 2024, custom extraction by Milieu.

Except in Switzerland and Belgium, recent movers have generally slightly lower employment rates than movers overall, the greatest gaps can be found in the Netherlands (-8 pps), France (-5 pps), and Spain (-3 pps) (Figure 24).

Recently immigrated TCNs often have employment rates substantially below those of other groups, with particularly large differences in Italy (-44 pps relative to all movers), Germany (-45 pps), Austria (-38 pps) and Belgium (-37 pps).

Figure 24: Employment rate of overall and recent movers in EU and EFTA countries, 2023



Note: 'Recent movers' and 'Recent TCNs' are defined as those who have spent 1 year or less in the Member State. The figure only shows Member States where data allowed for a comparison of recent movers and movers overall in line with Eurostat publication thresholds. Low reliability for recent movers for inactive in France and Italy; for unemployed in German and for TCNs for unemployed in Belgium.

Source: EU-LFS 2024, custom extraction by Milieu.

2.2.1.3. Comparison of unemployment rates[104]

In 2023, the unemployment rate for EU movers was 7 %, maintaining the level observed in 2022 and indicating a stabilisation below the pre-pandemic levels (Figure 25). Nationals experienced 5 % unemployment in 2023[105], i.e. the gap between EU movers and nationals has remained stable. The unemployment rate of TCNs has declined from 16 % in 2021 to 13 % in 2022, and further to 12 % in 2023. However, it remains higher than for the other two groups.

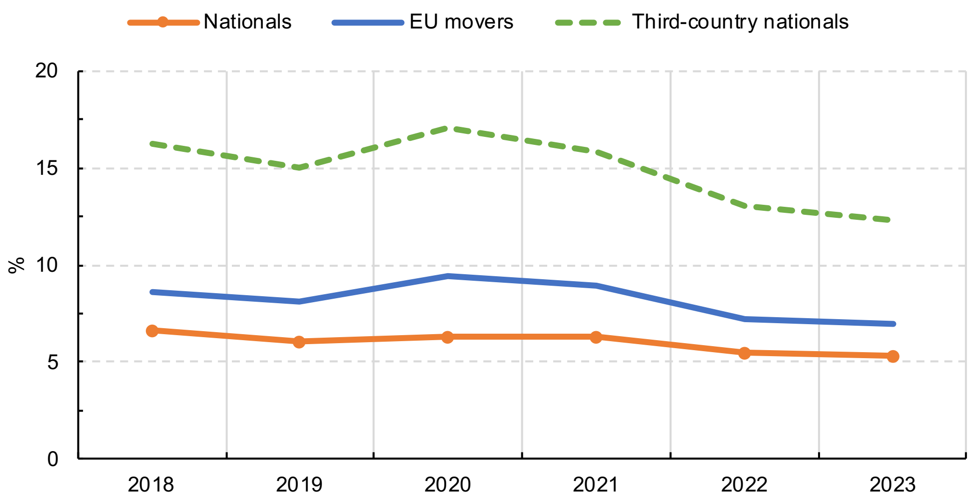
[104] Due to a lack of available data, no comparison of the unemployment rate of recent movers is possible.

[105] However, the unemployment rate among nationals in the five key countries of origin (Figure 12) varies significantly. Romania, the top country of origin, had an unemployment rate of 5 %, Poland 3 %, Italy 7 %, Portugal 6 %, and Bulgaria 4 %. Even when considering different registration practices, this suggests that a complete lack of employment is, in the current economic situation, not a key motivation for moving to another country.

Greece (16 %), Spain (14 %), and Italy (11 %) continue to report the highest unemployment rates for EU movers (Figure 26). These countries also have significant unemployment rates among nationals, with Spain and Greece at 11 %, and Italy at 7 %.

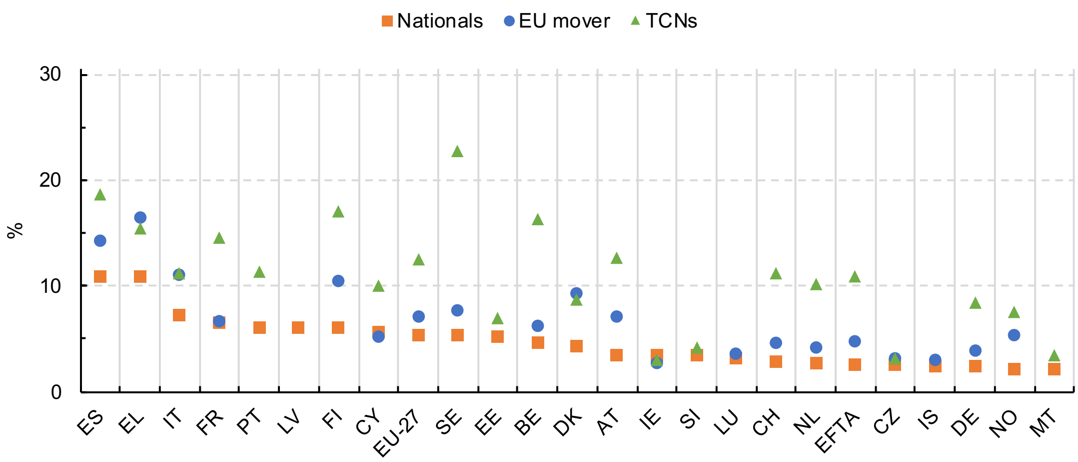
Comparing the unemployment rates of EU movers to those of TCNs, EU movers consistently show lower unemployment rates. In Sweden, the difference is particularly pronounced with a 18 pps gap, followed by Belgium (9 pps) and France (7 pps), mirroring the gap from the previous year.

Figure 25: Unemployment rate of movers in the EU, 2018-2023[106]



Source: EU-LFS 2024, custom extraction by Milieu.

Figure 26: Unemployment rate of movers in EU and EFTA countries, 2023



Note: Figure only shows Member States where data allowed for a comparison of nationals and at least one other group in line with Eurostat publication thresholds. Low reliability for EU movers for employed in Estonia; for unemployed in Czechia, Greece and Ireland. Low reliability for TCNs for inactive in Lithuania; for unemployed in Ireland, Slovenia, and Norway.

Source: EU-LFS 2024, custom extraction by Milieu.

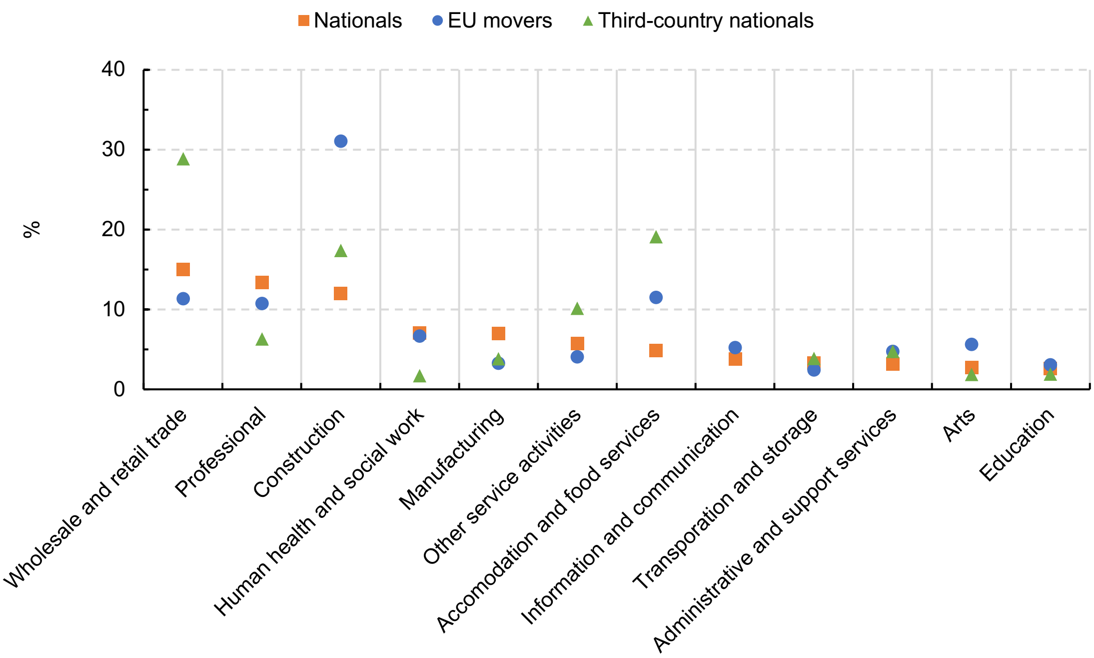
[106] Unemployment rates by nationality group and country of residence in 2018-2023 are shown in Table 35 in Annex B.2.

2.2.2. Self-employment

Self-employment refers to a situation where an individual works independently as the head of an own business or practice. This encompasses a broad group of circumstances, including both e.g., business owners with employees and self-employed individuals without employees.

In 2023, self-employed EU movers are notably concentrated in the construction sector (34 % of total self-employed EU movers) and the accommodation sector (12 %) (Figure 27). Self-employed TCNs show a similar pattern, frequently working in the construction sector (18 %) and accommodation and food services (18 %). Additionally, 26 % of total self-employed TCNs are found in the wholesale and retail trade sector. Self-employed nationals, on the other hand, have a more diverse distribution across various sectors, especially among wholesale and retail trade sector (15 %), professional activities (14 %), and agriculture (14 %).

Figure 27: Self-employment of movers in the EU by sector of employment, 2023[107]



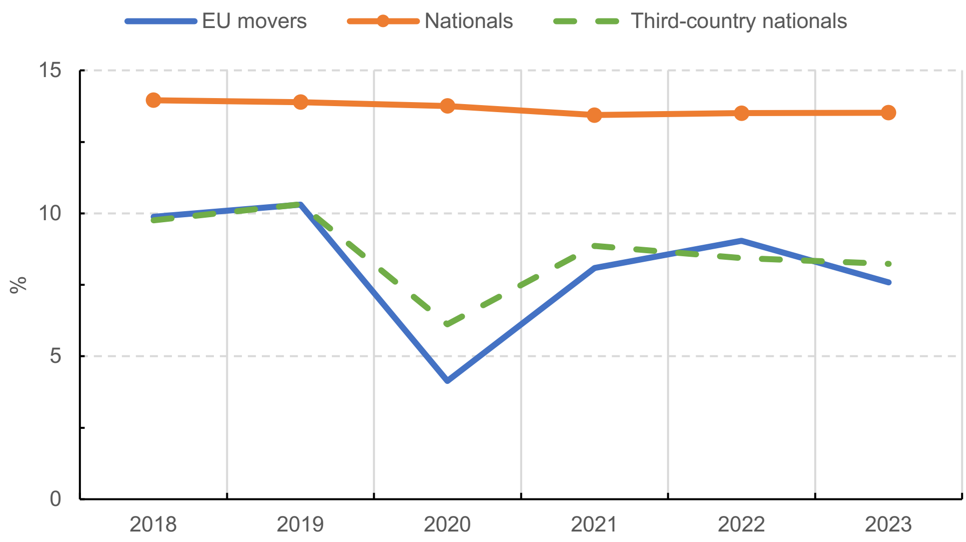
Note: The figure indicates the share of self-employed individuals, with and without employees, for each nationality group. Sectors without values above the publication threshold have been omitted from the chart.

Source: EU-LFS 2024, custom extraction by Milieu.

The share of self-employment among EU movers has shown significant variability between 2018 and 2023 (Figure 28). Starting at around 10 % in 2018, there is a notable dip to approximately 4 % in 2020, likely influenced by the economic disruptions caused by the COVID-19 pandemic. Following this dip, the self-employment rate rebounded, rising to around 9 % by 2022, and stabilising slightly below that in 2023. In contrast, the self-employment rate for nationals remained fairly stable throughout the whole period. Meanwhile, the self-employment rate of TCNs increased from a low of 6 % in 2020 to 9 % in 2021, before stabilising at around 8 % in the following years.

[107] The proportions of self-employed workers by nationality group and sector in 2023 are shown in Table 36 and Table 37 in Annex B.2.

Figure 28: Self-employment of movers in the EU, 2018-2023[108]

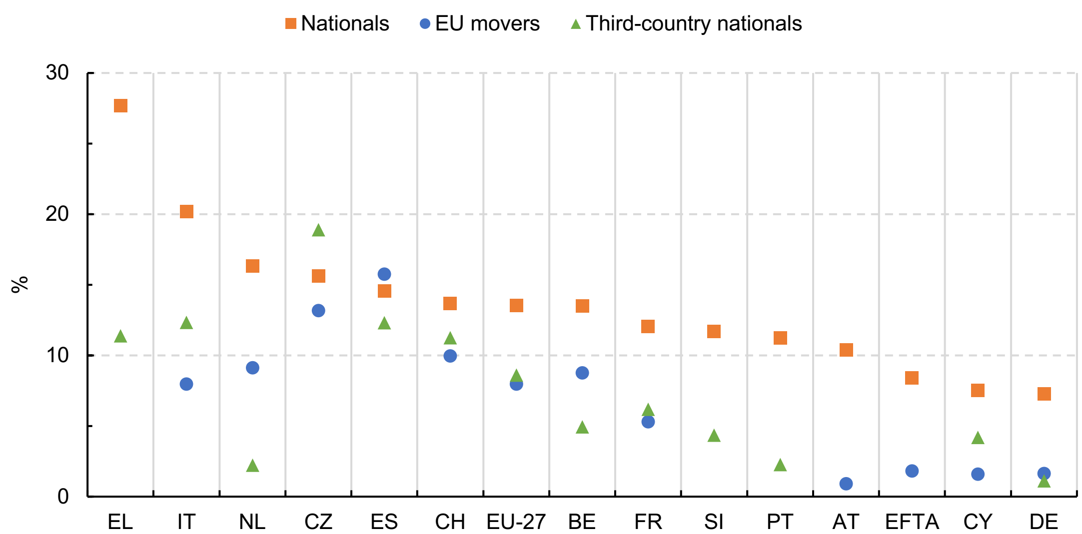


Note: The figure indicates the share of self-employed individuals, with and without employees, for each nationality group. Low reliability for EU movers in 2020.

Source: EU-LFS 2024, custom extraction by Milieu.

At the country level, nationals have in most cases the highest self-employment rates, especially in Greece (28 %), Italy (20 %), and the Netherlands (16 %) (Figure 29). EU movers, although generally displaying lower self-employment rates than nationals, show significant variation, with relatively high rates in the Czechia (13 %) and Spain (16 %). Notably, Spain is the only country where EU movers have a higher self-employment rate compared to nationals, with a 1 pp difference. In Czechia, while nationals still have a higher self-employment rate, the difference is only 2 pps. TCNs typically have the lowest self-employment rates but nevertheless still show notable engagement in specific countries, such as Czechia (19 %) and Italy (12 %).

Figure 29: Self-employment of movers in EU and EFTA countries, 2023[109]



[108] The absolute numbers of self-employed by nationality group in 2018-2023 are shown in Table 36 in Annex B.2.

[109] The proportions of self-employed workers by nationality group and country of residence in 2023 are shown in Table 38 in Annex B.2.

Note: The figure indicates the share of self-employed individuals, with and without employees, for each nationality group. Figure only shows Member States where data allowed for a comparison of nationals and at least one other group in line with Eurostat publication thresholds. Low reliability for EU movers in Czechia, Germany, Greece, Cyprus, Austria and Slovenia; for TCNs in Czechia, Germany, Greece, Portugal, and Slovenia.

Source: EU-LFS 2024, custom extraction by Milieu.

2.2.3. Contractual and working time arrangements

To better understand the labour market situation of movers, this section compares the prevalence of temporary work contracts and part-time work among nationals, EU movers and TCNs. The definition of an individual being 'employed' used in the EU-LFS is based on the ILO definition that comprises 'all those of working-age who, during a short reference period, were engaged in any activity to produce goods or provide services for pay or profit', and 'who worked in a job for at least one hour during the reference period'[110].

2.2.3.1. Fixed-term contracts

For EU movers, the share of fixed-term contracts has declined from 19 % in 2018 to 14 % in 2023 (Figure 30). Still, EU movers have a higher share of fixed-term contracts compared to nationals, who saw a decrease from 14 % to 11 % over the same period. The gap in temporary employment between EU movers and nationals has narrowed from 5 pps in 2018 to 3 pps in 2023.

TCNs have the highest share of fixed-term contracts among the three groups (24 %). However, also in this group the share of fixed-term contracts has decreased (28 % in 2018). Overall, the data indicates a general trend towards more stable employment across all groups.

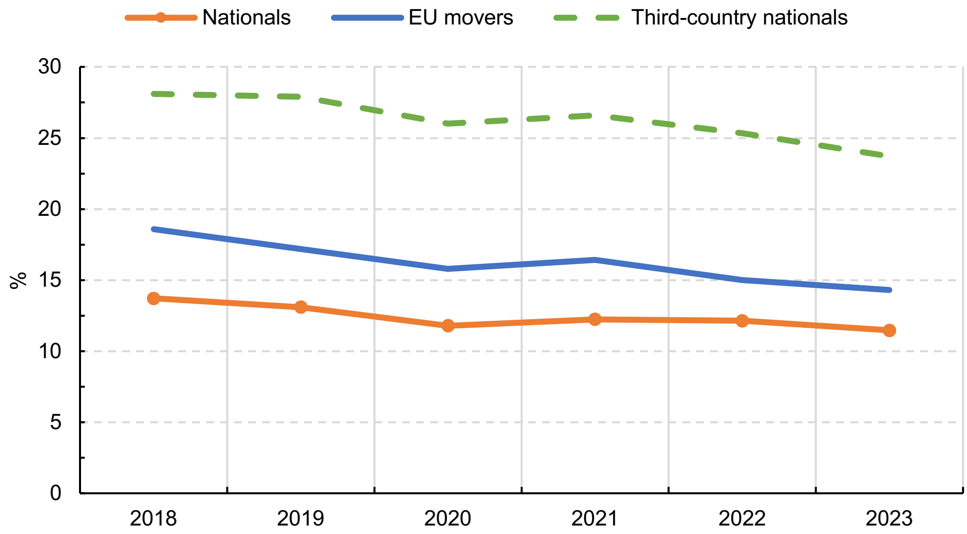
Several factors motivate the drive towards open-ended employment contracts: in the aftermath of the COVID-19 pandemic, companies have been seeking to rebuild and stabilise their workforce; government incentives aimed at reducing unemployment and promoting stable employment[111]; and lower unemployment figures and labour shortages, which give jobseekers the possibility to choose among job-offers[112].

[110] Pietschmann, et al. (2016), 'Key Labor Market Indicators: Analysis with Household Survey Data', International Labor Organisation (ILO), Geneva, p. 13; International Labor Organization (ILO) (2022).

[111] See for instance the Spanish Royal Decree-Law 32/2021, of 28 December, on urgent measures for labour reform, the guarantee of stability in employment and the transformation of the job market, published in the Boletín Oficial del Estado [Official State Gazette]) No. 313.

[112] Other sources have documented a shift from flexible employment towards more permanent contracts. See: Statistics Netherlands (CBS) (2024), 'Fewer workers in flexible employment and more on permanent contracts', available here: https://www.cbs.nl/en-gb/news/2024/20/fewer-workers-in-flexible-employment-and-more-on-permanent-contracts [last accessed June 2024].

Figure 30: Share of movers with fixed-term contracts in the EU, 2018-2023[113]



Source: EU-LFS 2024, custom extraction by Milieu.

Large differences between temporary employment rates for EU movers and national gaps are found in the Netherlands, with 30 % of EU movers and 23 % of nationals on fixed-term contracts and in Greece (17 % of EU movers vs 10 % of nationals) (Figure 31).

In contrast, in Iceland, nationals have a higher share of fixed-term contracts compared to EU movers, with 10 % and 7 % on fixed-term contracts, respectively. Similarly, in Cyprus 7 % of nationals are on fixed-term contracts compared to 5 % of EU movers. Cyprus also has the highest share of TCNs on fixed-term contracts at 55 %, marking more than a 50 pps difference with the other two groups.

TCNs are much more likely to have fixed-term employment contracts also in the Netherlands (45 %), Poland (41 %), and Portugal (40 %). Reasons for that can be attributed to several interrelated factors. Immigration policies facilitate temporary labour market entry through specific visas or work permits. For instance, Portugal offers simplified visa procedures for skilled workers and entrepreneurs, such as the D1 and D2 visas[114]. The Netherlands provides the Highly Skilled Migrant visa for professionals in high-demand sectors[115], while Poland has a streamlined visa process for workers in industries with labour shortages, like the National Visa (D). Additionally, employers favour temporary contracts for their flexibility, particularly in sectors like agriculture, construction, and hospitality, which have high seasonal or project-based demands, notably in Cyprus and Poland[116]. The regulatory environment, with less stringent renewal regulations and lower costs for temporary hires, promotes this practice. In the Netherlands, temporary employment is common, even among Dutch nationals. A Dutch

[113] Absolute numbers of fixed-term contracts by nationality group in 2018-2023 are shown in Table 39 in Annex B.2.

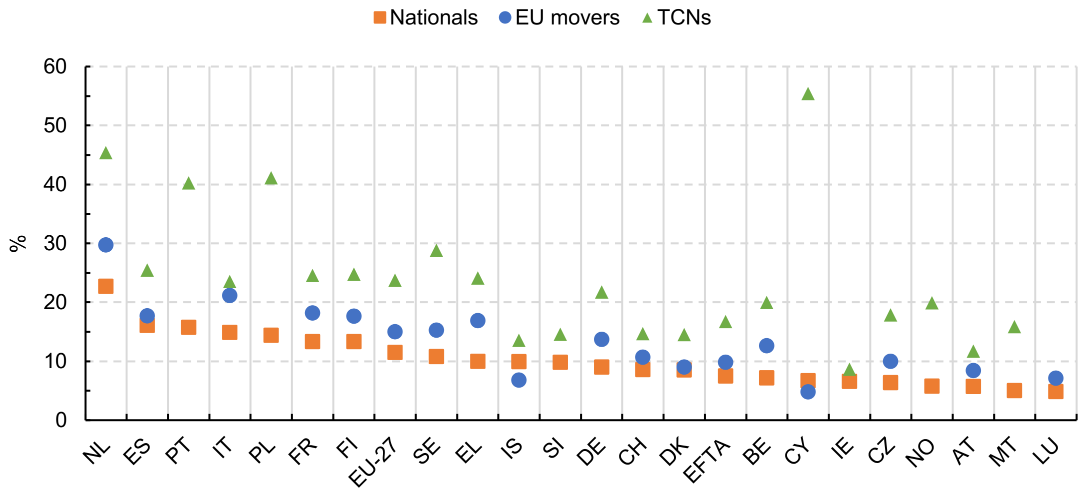
[114] Ministry of Foreign Affairs. *Type of visa*. Diplomatic Portal. Retrieved July 24, 2024, from https://vistos.mne.gov.pt/en/national-visas/general-information/type-of-visa#work-and-investigation.

[115] European Commission (2024d), *Netherlands - Highly-qualified worker*, Directorate-General for Migration and Home Affairs EU Immigration Portal (Accessed July 2024).

[116] European Commission (2023b), *Poland: Almost 1.3 million foreigners work legally in Poland,* European Website on Integration (Accessed July 2024).

study found that language barriers significantly increase migrants' likelihood of temporary employment, a dynamic that may apply to other countries[117].

Figure 31: Share of movers with fixed-term contracts in EU and EFTA countries, 2023[118]



Note: Figure only shows Member States where data allowed for a comparison of nationals and at least one other group in line with Eurostat publication thresholds. Low reliability for EU movers in Greece.

Source: EU-LFS 2024, custom extraction by Milieu.

2.2.3.2. Part-time employment

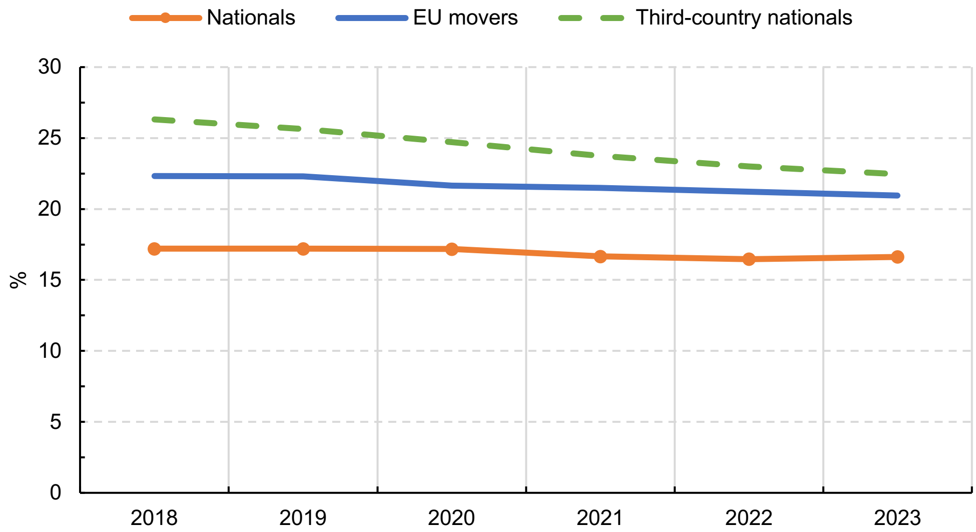
From 2018 to 2023, the employment patterns of EU movers and nationals in the EU remained stable, with EU movers consistently having around 21-22 % part-time employment and nationals maintaining a steady 17 % (Figure 32). Conversely, TCNs showed a decline in part-time employment, from 26 % in 2018 to 22 % in 2023.

Nonetheless, the elevated prevalence of part-time work among EU movers is predominantly attributable to circumstances observed in a few Member States: Greece, France, Italy and, to a lesser extent, Czechia and Spain (Figure 33). In all other Member States and EFTA countries, part-time work is more prevalent among nationals than among EU movers. For instance, in Switzerland, 43 % of nationals are employed part-time, significantly higher than 27 % of EU movers and 35 % of TCNs. Similarly, in the Netherlands, 40 % of nationals work part-time compared to 26 % of EU movers and 30 % of TCNs. In Austria and Germany, part-time employment rates are also higher for nationals at 31 % and 29 %, respectively, compared to 29 % and 24 % for EU movers, and 29 % and 24 % for TCNs. In contrast, in countries such as Greece, France and Italy, EU movers have a higher share of part-time employment than nationals.

[117] Boffi, G. (2024), Temporary employment of first-generation migrants in the Netherlands. *Journal of International Migration and Integration, 25*(1), 1-35.

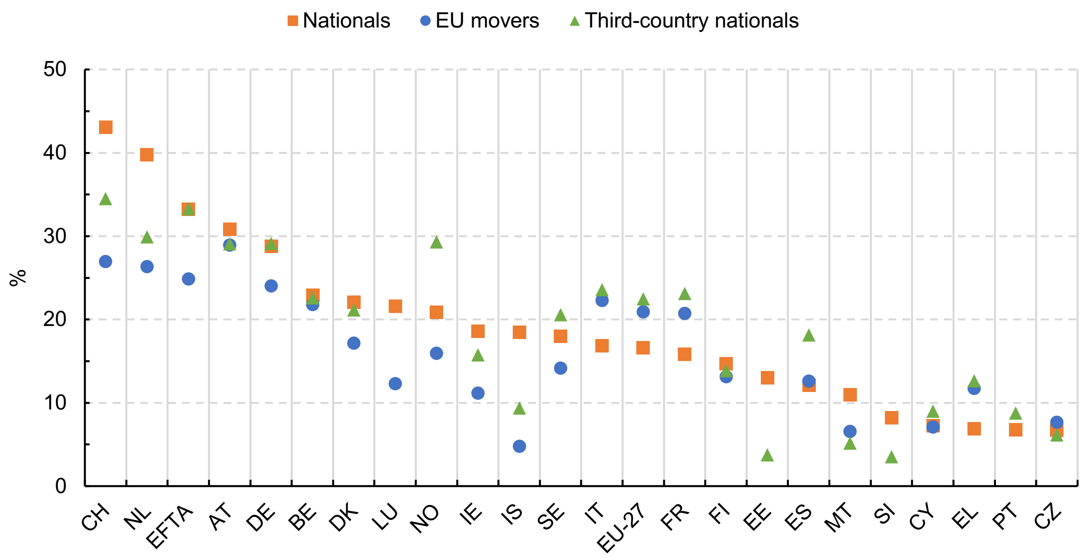
[118] The number and share of fixed-term contracts by nationality group and country of residence in 2023 are shown in Table 40 in Annex B.2.

Figure 32: Share of movers with part-time employment in the EU, 2018-2023[119]



Source: EU-LFS 2024, custom extraction by Milieu.

Figure 33: Share of movers with part-time contracts in EU and EFTA countries, 2023[120]



Note: Figure only shows Member States where data allowed for a comparison of nationals and at least one other group in line with Eurostat publication thresholds. Low reliability for EU movers in Greece; and for TCNs in Estonia and Slovenia.

Source: EU-LFS 2024, custom extraction by Milieu.

The higher rates of part-time employment among EU movers, particularly in Greece, Spain, France and Italy, can be attributed to a number of factors, including the structure of the economy and the types of industries where movers are often employed. For instance, EU movers may be employed in sectors such as tourism and hospitality, which play a significant role in these countries' economies and traditionally offer more part-time opportunities due to their seasonal and demand-driven nature. Additionally, economic challenges and high unemployment rates can make part-time positions more accessible,

[119] The absolute numbers of part-time contracts by nationality group in 2018-2023 are shown in Table 41 in Annex B.2.

[120] The number and share of part-time contracts by nationality group are shown in Table 42 in Annex B.2.

as employers might prefer hiring part-time workers to reduce costs and maintain flexibility.

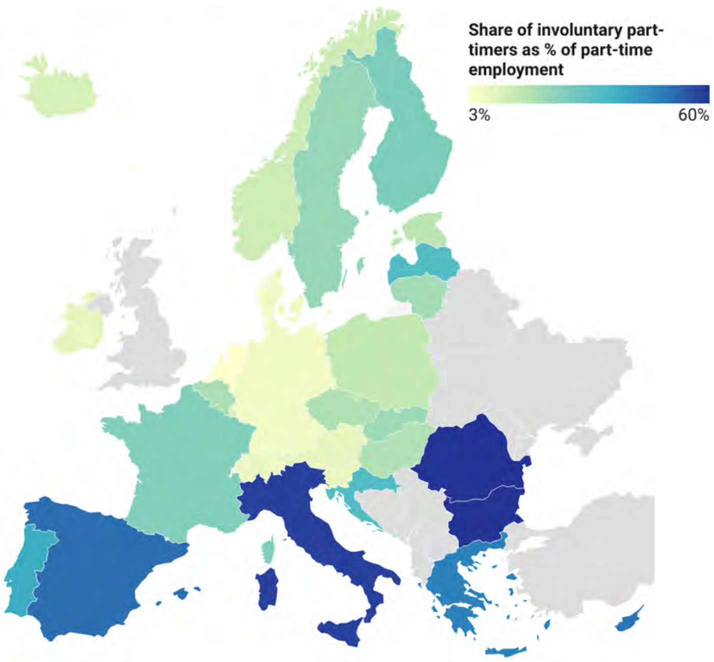
The prevalence of part-time jobs among nationals might also be attributed to cultural and social norms that emphasise work-life balance. For instance, Switzerland, the Netherlands, Germany, and Austria have policies that promote flexible working arrangements, allowing individuals, particularly women, to balance work with family responsibilities. Distinguishing between voluntary and involuntary part-time employment can help disentangle the factors at play (see box below).

Box 4: Involuntary part-time employment in the EU and EFTA countries

The figure below uses OECD data to show the incidence of involuntary part-time work among part-time workers in 2022. Southern and eastern European countries such as Bulgaria (60 %), Romania (60 %), Italy (58 %), Spain (51 %), and Greece (48 %) exhibit the highest percentages of involuntary part-timers. In contrast, rates are lowest in countries such as the Netherlands (3 %), Denmark (6 %), Germany (6 %), Switzerland (7 %) and Austria (8 %).

These differences suggest varying labour market conditions and economic structures across Europe. In countries with low involuntary part-timers, part-time work may be seen more as a choice than a necessity[121].

Figure 34: Incidence of involuntary part-timers in the EU and EFTA countries, 2022



Note: The figure depicts share of involuntary part-time workers over total part-time workers in EU and EFTA countries. The working-age is between 15-64 years old.

Source: OECD.Stat, Dataset: Incidence of involuntary part-time workers, available here: https://stats.oecd.org/index.aspx?DataSetCode=INVPT_D# [last accessed June 2024].

[121] Mežienė, R., Krutulienė, S., and Gruževskis, B. (2021), 'Identifying the main determinants of part-time employment in EU countries', *Review of Economic Perspectives*, Vol. 21, Issue 2, pp. 151-171, De Gruyter, Warsaw, ISSN 1804-1663. https://doi.org/10.2478/revecp-2021-0007

2.3. Characteristics of mobile workers in employment

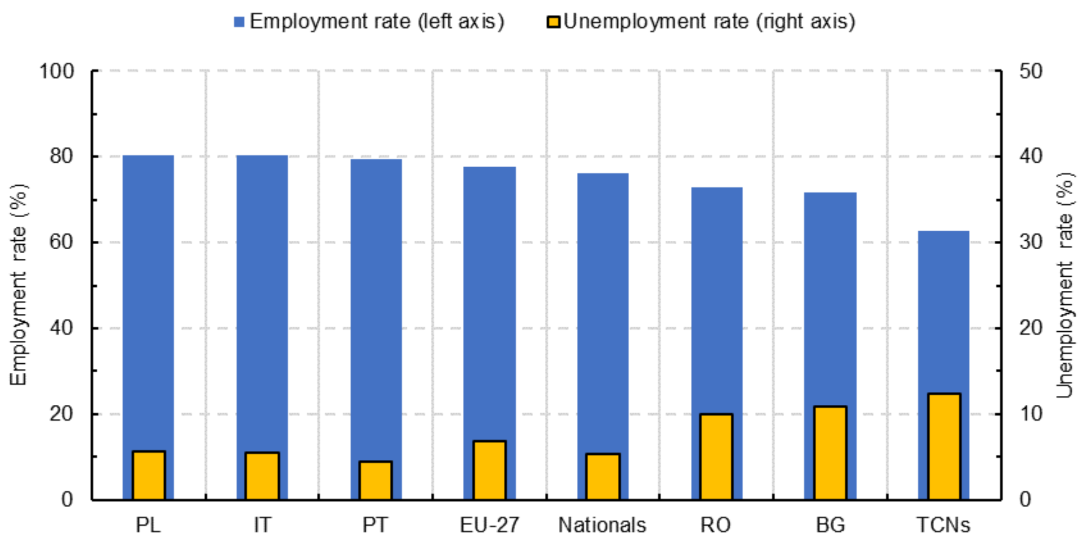
This section examines the relationship between various demographic (country of origin, gender, age) and socio-economic (education, occupations, economic sectors) factors and the employment rates of nationals, movers, and TCNs.

2.3.1. Demographic factors

2.3.1.1. Employment and unemployment rate by country of origin

The employment rate of different nationality groups varies significantly between Member States and data are only available for a few nationalities (Figure 35)[122]. Polish, Italian, and Portuguese movers are relatively more integrated in the labour market of their host countries compared to the average EU mover. The employment rate for movers from these countries is around 80 %, higher than the average for all EU movers (78 %) and that of nationals (76 %). Similarly, the unemployment rate for Polish, Italian, and Portuguese movers is around 4-6 %, lower than the average unemployment rate for EU movers, which stands at 7 %. In stark contrast, TCNs display the lowest employment (63 %) and highest unemployment rates (12 %).

Figure 35: Employment and unemployment rates of movers by nationality in the EU, 2023



Note: E.g. Movers of Polish, Italian and Portuguese nationality had a lower unemployment rate, and higher employment rate, compared to all EU movers (“EU-27” in the graph). Employment and unemployment rates were only calculated for nationality groups that were sufficiently large to pass the publication threshold.

Source: EU-LFS 2024, custom extraction by Milieu.

[122] Due to Eurostat publication thresholds, comparable data is only available for a few nationalities in addition to the aggregate nationality groups.

2.3.1.2. Employment rate by gender

Enhancing labour market integration of women, improving both their lifetime earnings and overall autonomy, is a recurring objective of the EU employment strategy and has been reflected in the goals of the 2021-2027 Action Plan on Integration and Inclusion[123], the European Pillar of Social Rights Action Plan[124], and the 2020-2025 Gender Equality Strategy[125]. Furthermore, progress on labour market integration is monitored in the report on gender equality in the EU on an annual basis[126].

Among EU movers, female employment rates have risen from 67 % in 2018 to 71 % in 2023 (Table 10). This growth is mirrored by an increase in male employment rates from 83 % to 85 % over the same period. Consequently, the gender employment gap has decreased slightly from 16 percentage points (pps) in 2018 to 14 pps in 2023. Despite the positive trend, EU movers continue to show a higher gender employment gap than nationals. The gender gap for TCNs remains the biggest (24-26 pps), still, a trend towards higher employment rates of women is visible.

Table 10: Employment rate of EU movers by gender and nationality group in the EU, 2018-2023[127]

	Gender	2018	2019	2020	2021	2022	2023
Nationals	Female	68	68	68	69	71	72
	Male	79	79	78	79	80	81
	Difference (pps)	11	11	11	10	10	9
EU movers	Female	67	68	66	67	70	71
	Male	83	83	80	82	84	85
	Difference (pps)	16	15	15	16	14	14
Third-country nationals	Female	47	47	45	46	49	51
	Male	70	72	69	71	75	75
	Difference (pps)	23	25	25	24	26	24

Source: EU-LFS 2024, custom extraction by Milieu. Dots in the trend lines indicate the highest and lowest values in the reference period.

At the national level, significant differences in male and female employment rates of EU movers are observed (Figure 36). Italy and Czechia exhibit the largest gender employment gaps for EU movers, at 25 and 19 pps respectively, well above the EU average of 4 pps. In Italy, this issue is particularly pronounced, as women account for the majority of incoming movers (see Section 1.2.2). The substantial gender employment gap indicates significant obstacles for women in accessing employment and/or a substantial demand for women to work in the informal economy (e.g. provision of household services, care etc.). Among nationals the gender employment gap in Italy is 18 pps, second only to Romania and Greece, both at 19 pps.

123 Communication COM(2020) 758 from the Commission on the Action plan on Integration and Inclusion 2021-2027.

124 European Commission (2021), 'European Pillar of Social Rights action plan', Luxembourg: Publications Office of the European Union.

125 Communication COM(2020) 152 from the Commission on A Union of Equality: Gender Equality Strategy 2020-2025.

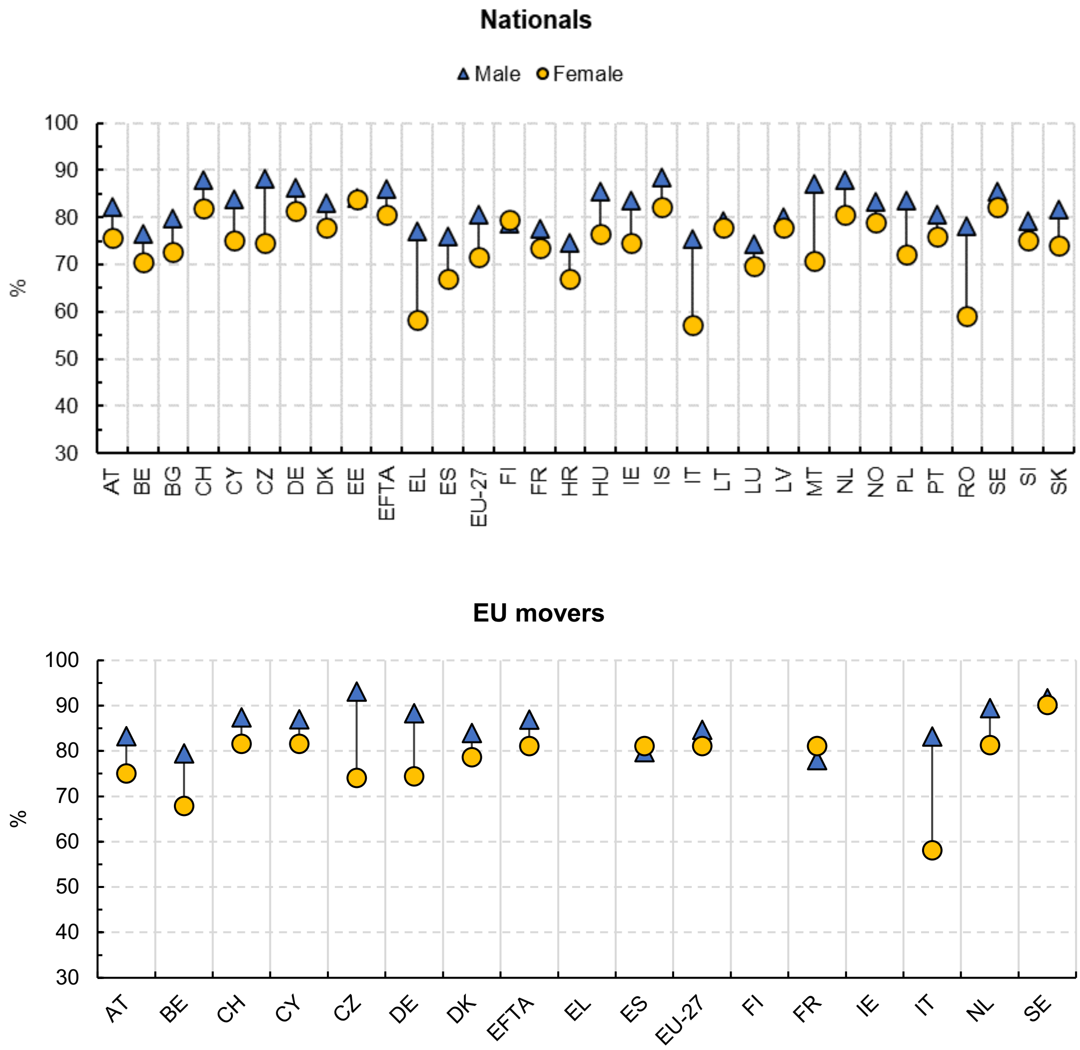
126 For the most recent edition, cf. European Commission (2024a), '2024 report on gender equality in the EU', European Commission (DG JUST), Brussels.

127 The employment rate of male and female EU movers in EU and EFTA countries in 2018-2023 is shown in

Table 43 in Annex B.2.

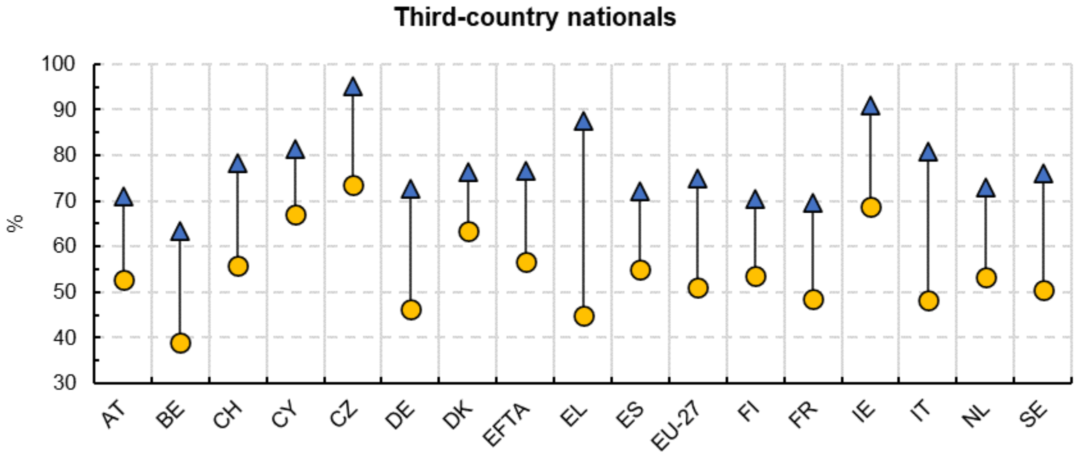
Conversely, Sweden, Spain, and France exhibit much smaller or even negative gender employment gaps among EU movers. In Sweden, the gender employment gap is at 2 pps, consistent with the figures for Swedish nationals, which have a gender employment gap of 3 pps. Spain and France stand out with negative gender employment gaps, at -1 pps and -3 pps respectively, suggesting that female EU movers in these countries have slightly higher employment rates than their male counterparts.

Figure 36: Employment rate of EU movers by gender in selected EU and EFTA countries, 2023[128]



[128] The employment rate of male and female EU movers in EU and EFTA countries in 2018-2023 is shown in

Table 43 in Annex B.2.



Note: Low reliability limits for female **EU movers** in Czechia, Denmark, Greece, France and Sweden; and males in Cyprus, Czechia, Denmark, France and Sweden. Low reliability for female **third-country nationals** in Estonia, Slovenia and Norway; and males in Czechia, Estonia, Ireland and Portugal.

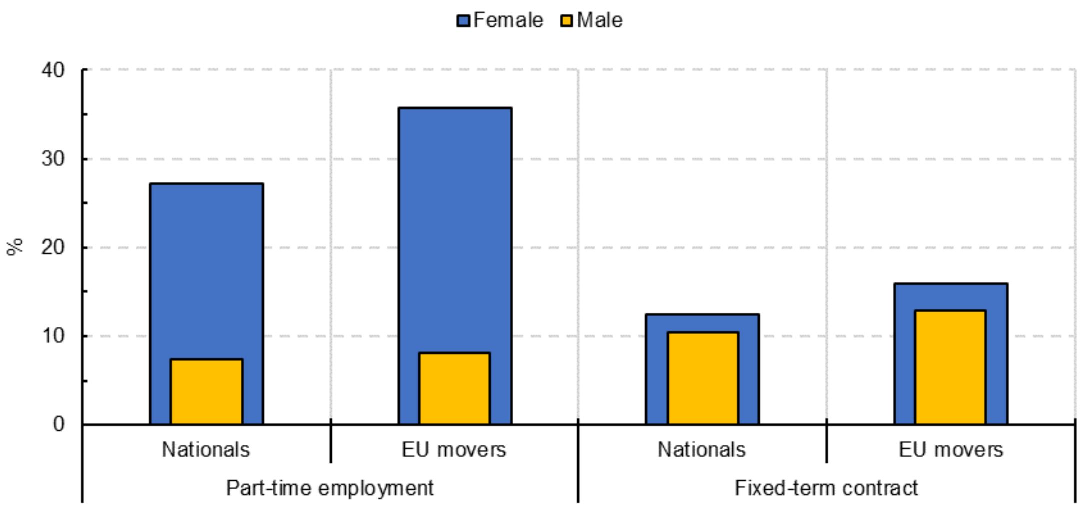
Source: EU-LFS 2024, custom extraction by Milieu

When it comes to contractual and working time arrangements, women are more likely to be employed on part-time and fixed-term contracts than men (Figure 37). Approximately 36 % of employed female EU movers work part-time, compared to 8 % of their male counterparts, resulting in a difference of 28 pps. For nationals, the gap is 20 pps. Although the difference in the prevalence of fixed-term contracts is less pronounced, there is still a higher incidence among female nationals and movers compared to their male counterparts.

The countries with the highest percentages of female movers in part-time jobs are Switzerland (47 %), Austria (45 %) and Germany (44 %)[129]. The high rate of part-time employment among female movers might be explained by several factors. These include inequitable parental leave policies and strong labour markets with a high demand for part-time work (especially in female-dominated industries).

[129] When it comes to male EU movers in part-time jobs in those countries, rates are significantly smaller; 12 % in Switzerland, 14 % in Austria and 9 % in Germany.

Figure 37: Part-time employment and fixed-term contracts by nationality group and gender in the EU, 2023[130]



Source: EU-LFS 2024, custom extraction by Milieu.

2.3.1.3. Employment rate by age group

Across all nationality groups, the highest employment rate is observed in the 35-49 age cohort, and the lowest for individuals aged 50-64 years (Table 11). Activity rates are the lowest for the oldest age group, reflecting a larger proportion of individuals who have left the labour market because of, for example, retirement or illness[131]. Despite this, the activity rate for the oldest cohort is higher for EU movers than for nationals and TCNs (77 % vs 74 % and 66 % respectively). In general, across all age groups, EU movers exhibit robust labour market outcomes.

Variations in labour market integration among different age groups of movers can be attributed to a variety of factors. For older movers, one significant challenge might be the lack of digital skills, which are increasingly in demand across many labour markets[132]. As technology continues to advance, digital skills are increasingly essential for employment across sectors, as digitalisation permeates almost every field. A lack of digital literacy limits both job opportunities for workers and the flexibility needed for mobility within the EU labour market[133].

Younger individuals, on the other hand, might struggle to connect with the local labour market due to a lack of professional networks, limited work experience, or challenges in

[130] The proportion of male and female movers and nationals in part-time or fixed-term employment in 2023 is shown in

Table 44 in Annex B.2.

[131] As shown in previous editions of this report, the group of older movers is relatively smaller and less active than other age cohorts, although slightly increasing over time (+2 pps since 2018). See the thematic chapter in: Hassan, et al. (2023), '2023 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

[132] European Parliament (2017), 'Digital skills in the EU labour market', In-depth analysis - EPRS. See also: European Commission website on 'Digital Skills and Jobs – Shaping Europe's digital future', available here : https://digital-strategy.ec.europa.eu/en/policies/digital-skills-and-jobs [last accessed July 2024].

[133] European Parliament (2017), 'Digital skills in the EU labour market', In-depth analysis - EPRS. DigitalEurope (2024), Closing the digital skills gap – A priority for our economic security.

adapting to local labour market requirements[134]. Additionally, language barriers and unfamiliarity with the local labour market dynamics can further impede their integration. Further analysis into these dynamics is beyond the scope of this report.

Table 11: Employment, unemployment and activity rates by nationality group and age group in the EU, 2023

	Indicator	20 - 34 years	35 - 49 years	50 - 64 years	Comparison
Nationals	Employment rate	72	86	70	
	Unemployment rate	8	4	4	
	Activity rate	79	90	74	
EU movers	Employment rate	76	83	71	
	Unemployment rate	8	6	7	
	Activity rate	83	88	77	
Third-country nationals	Employment rate	62	66	57	
	Unemployment rate	13	12	13	
	Activity rate	71	74	66	

Source: EU-LFS 2024, custom extraction by Milieu. The red bars in the comparison column indicate the lowest value.

2.3.2. Socio-economic factors

2.3.2.1. Education level

The education level of individuals, understood as their highest attained formal education[135], influences their ability to secure employment and the types of jobs available to them. Whether a mover has high, medium or low educational attainment can carry a significant impact on their labour market integration.

Around a third of EU movers have high educational attainment in 2023, similar to nationals (Table 12). The share of highly educated EU movers increased from 2018 to 2020 by 3 pps and has remained stable at 32 % since then. In contrast, the share of those with low education levels has increased from 28 % in 2018 to 30 % in 2022 and 2023. The proportion of medium-skilled EU movers has decreased since at least 2018. These trends contrast with those observed among nationals, who exhibit a steady decline in low and medium education levels and a consistent increase in high educational attainment. The educational attainment of TCNs follows a similar pattern as the nationals, showing decreasing shares of low and medium skilled and increasing shares of highly skilled. This is in line with several national policies aimed at attracting "talent" from third countries.

[134] See for instance: International Labour Organization (2017), 'Policy brief on labour market integration measures for young people'; European Commission (2023a), 'Integration of young people into the labour market with particular focus on traineeships', Flash Eurobarometer 523.

[135] The terminology in this study follows that of the 2011 version of the International Standard Classification of Education (ISCED), as operationalised by e.g. Eurostat as follows: 'low' educational attainment refers to ISCED levels 0-2 (early childhood, primary and lower secondary education); 'medium' refers to ISCED levels 3-4 (upper secondary and post-secondary non-tertiary education); and 'high' refers to ISCED levels 5-8 (short-cycle tertiary education and tertiary education at Bachelor, Master's or Doctoral level). For more information, cf. Eurostat (2024c), 'International Standard Classification of Education (ISCED)', Eurostat, Luxembourg.

Table 12: Educational attainment by nationality group in the EU, 2018-2023

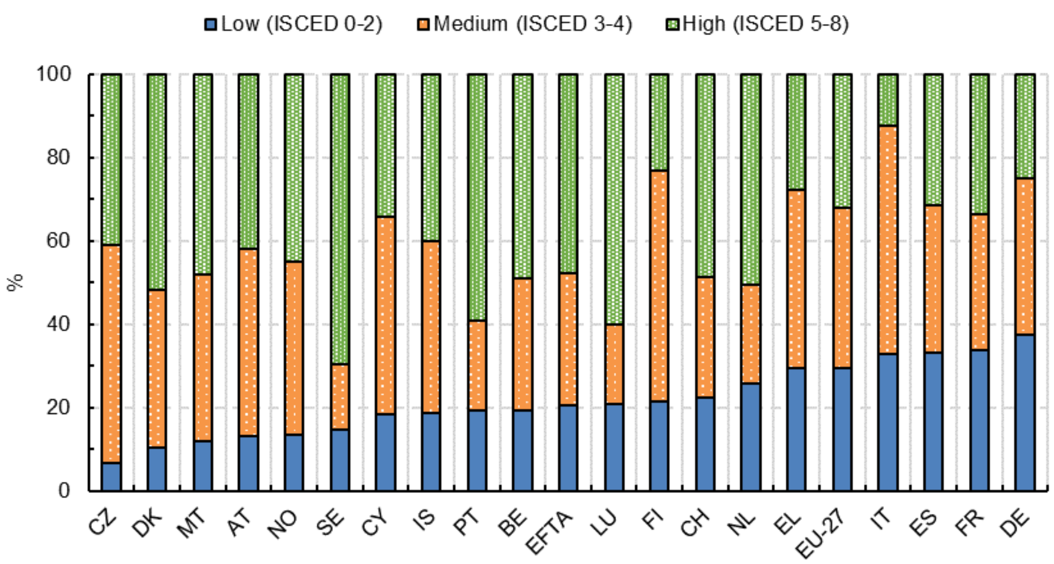
	2018	2019	2020	2021	2022	2023	Trend
Nationals (%)							
Low	20	19	19	19	18	18	
Medium	50	50	49	49	48	48	
High	30	31	32	33	33	34	
EU movers (%)							
Low	28	28	27	29	30	30	
Medium	42	42	40	39	38	38	
High	29	30	32	32	32	32	
Third-country nationals (%)							
Low	47	46	46	47	45	43	
Medium	30	31	30	29	29	29	
High	22	23	24	24	25	27	

Note: Percentages indicate the share of working-age individuals which have that educational attainment in the specified nationality group. Dots in the trend lines indicate the highest and lowest values in the reference period. Smaller sectors have been excluded from the table. 'Low' educational attainment refers to ISCED levels 0-2 (early childhood, primary and lower secondary education); 'medium' refers to ISCED levels 3-4 (upper secondary and post-secondary non-tertiary education); and 'high' refers to ISCED levels 5-8 (short-cycle tertiary education and tertiary education at Bachelor, Master's, or Doctoral level).

Source: EU-LFS 2024, custom extraction by Milieu.

There are considerable disparities in the educational attainment of the EU movers across the EU and EFTA (Figure 38). Germany (37 %), France (34 %), Spain (33 %) and Italy (33 %) have the highest proportion of movers with low educational attainment, surpassing the EU average of 30 %. In contrast, Sweden (70 %), Luxembourg (60 %), Portugal (59 %), Denmark (52 %) and the Netherlands (51 %) attract more movers with high educational attainment than the EU average of 32 %.

Figure 38: Educational attainment of movers by EU and EFTA countries, 2023

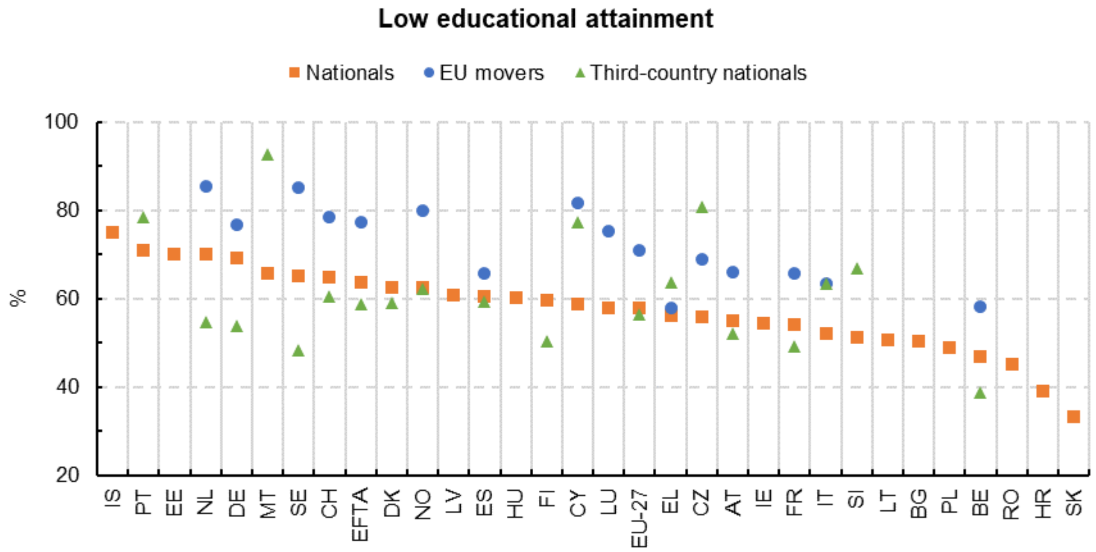


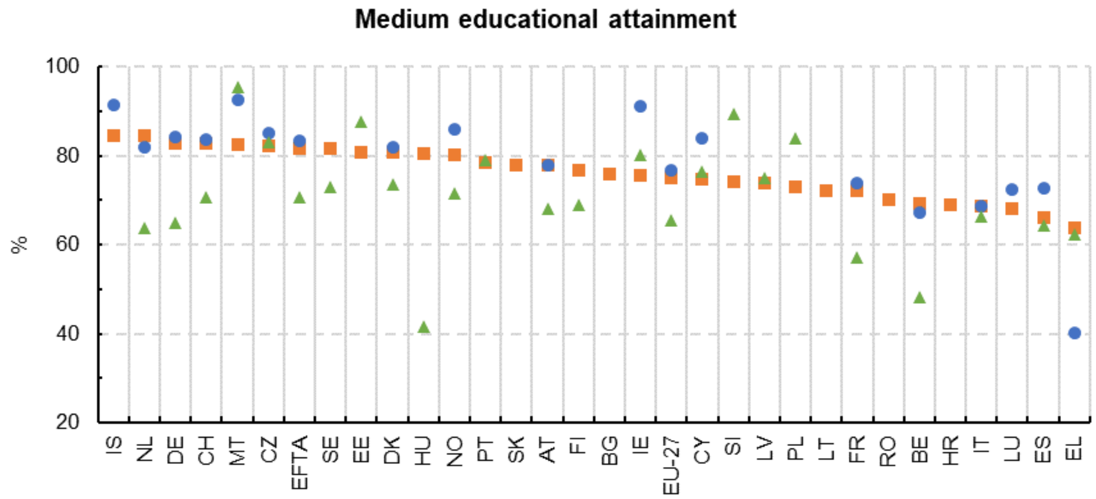
Note: The definition of the various levels of education attainment is provided under Table 12. Some Member States have been omitted due to missing data from one or more of the educational attainment categories.

Source: EU-LFS 2024, custom extraction by Milieu.

Comparing the employment rates by both nationality and educational attainment (Figure 39)[136], it becomes visible that EU movers with low and medium educational attainment generally display higher employment rates than nationals and TCNs. This suggests that EU movers with lower levels of education are often more integrated into the labour market compared to their national and TCN counterparts. Among individuals with high educational attainment, nationals tend to have quite high employment rates. Nevertheless, EU movers with high educational attainment in Cyprus, Czechia, Denmark, Ireland, Luxembourg and Norway have higher employment rates than nationals with the same educational level.

Figure 39: Employment rate by nationality group and educational attainment in selected EU and EFTA countries, 2023[137]

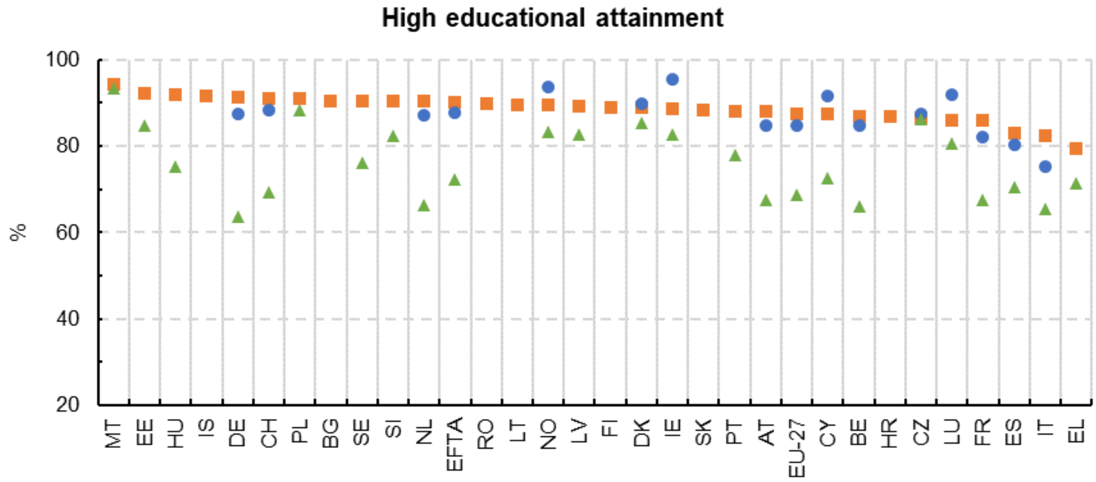




[136] The following discussion is based on classifications of educational attainment based on ISCED categories. 'Low educational attainment' refers to ISCED levels 0-2 (early childhood, primary and lower secondary education); 'Medium' to ISCED levels 3-4 (upper secondary and post-secondary non-tertiary education); and 'High' to ISCED levels 5-8 (short-cycle tertiary education and tertiary education at Bachelor's, Master's or Doctoral level).

[137] The exact shares for each level of educational attainment, nationality group and country are shown in

Table 45 in Annex B.2.



Note: The definition of the various levels of education attainment is provided under Table 12. Low reliability for – **Low education**: nationals in Cyprus, Norway and Slovenia; EU movers in Czechia and the Netherlands; TCNs in Cyprus, Denmark and Portugal - **Medium education**: EU movers in Cyprus, Czechia, Germany, Greece, France and the Netherlands- **High education**: EU movers in Czechia, Germany and Denmark; third-country nationals in Czechia, Denmark, Estonia and Greece

Source: EU-LFS 2024, custom extraction by Milieu.

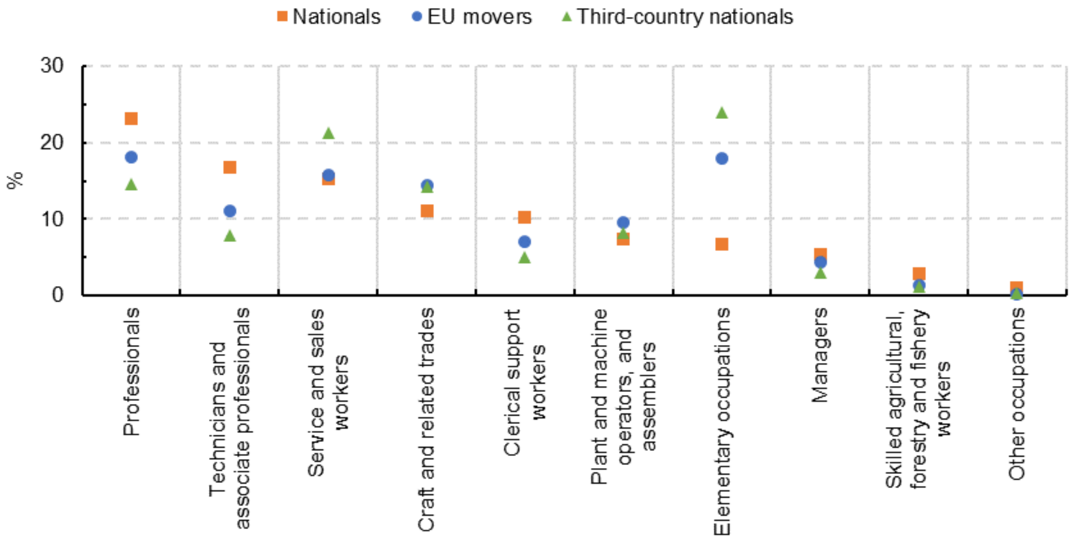
2.3.2.2. Occupations

Compared to nationals, EU movers are overrepresented in two occupations namely craft and related trades and elementary occupations (Figure 40). They are also slightly overrepresented in service and sales work and as plant and machine operators. This suggests that EU movers often occupy roles that may require more manual labour or are considered less desirable by nationals, reflecting potentially easier access to these jobs or a willingness to accept such roles due to economic necessity or fewer language barriers[138].

Similarly to movers, TCNs are overrepresented in jobs typically requiring lower skills, such as elementary occupations, craft and related trades and service and sales workers. In contrast, nationals tend to dominate more professional and managerial roles, such as professionals and technicians and associate professionals.

[138] See for instance: Constant, A., F. (2014), 'Do migrants take the jobs of native workers ?', IZA World of Labour.

Figure 40: Employees by nationality group and occupation in the EU, 2023



Note: The occupations are ranked from highest to lowest for nationals. Some smaller occupations are aggregated under the category 'Other occupations'.

Source: EU-LFS 2024, custom extraction by Milieu.

While the distribution across occupations has remained relatively stable over time for EU movers, the number of movers in the professionals' category has been increasing since at least 2018, becoming the most common occupation among EU movers in 2023 (Table 13). This category is also one of the few that did not experience a decrease during the COVID-19 pandemic crisis, probably due to its adaptability to transition to remote working arrangements[139].

Table 13: EU movers by occupation in employment in the EU, 2018-2023

	2018	2019	2020	2021	2022	2023	Trend
Employed working-age movers (thousands)							
Professionals	850	905	989	1018	1107	1160	
Elementary occupations	1174	1210	1054	1044	1146	1145	
Service and sales workers	967	997	884	901	977	1012	
Craft and related trades	948	947	825	873	938	924	
Technicians and associate professionals	592	646	613	610	683	705	
Plant and machine operators, and assemblers	505	539	499	527	566	615	
Clerical support workers	362	378	355	396	435	445	
Managers	237	264	224	243	277	281	
Skilled agricultural, forestry and fishery workers	90	98	85	88	87	83	

Note: Dots in the trend lines indicate the highest and lowest values in the reference period. Smaller sectors have been excluded from the table.

Source: EU-LFS 2024, custom extraction by Milieu.

[139] The impact of the COVID-19 pandemic on intra-EU labour mobility was discussed in Chapter 3 of the 2021 report; cf. Fries-Tersch, et al. (2022).

2.3.2.3. Economic sectors

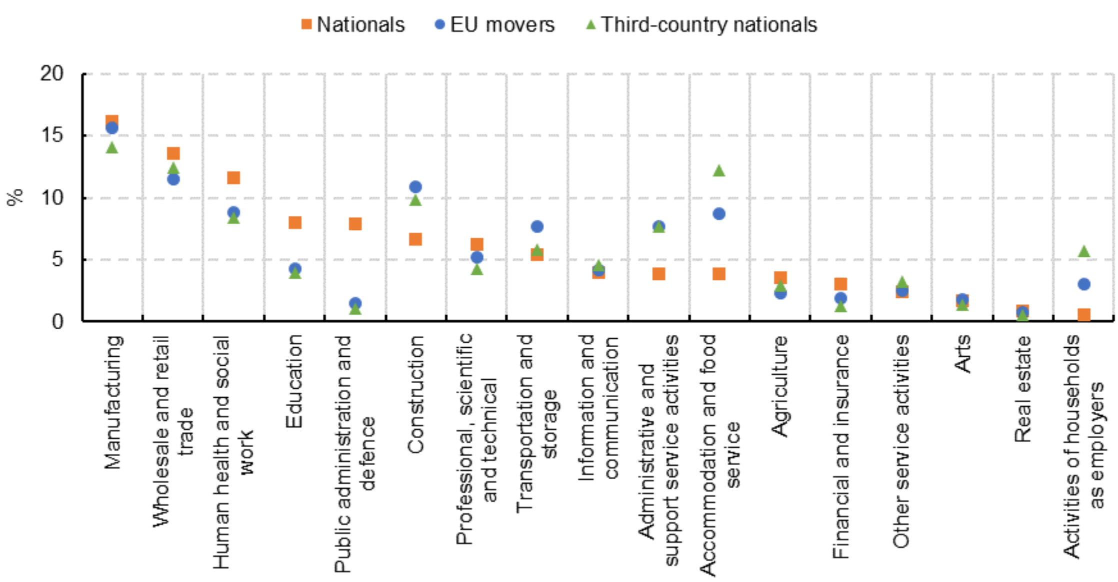
The employment landscape for EU movers reveals interesting patterns in terms of sectoral participation (

Figure 41). In 2023, movers were notably overrepresented in construction, accommodation and food services, and transportation sectors, employing 11 %, 9 % and 8 % of movers, respectively. Finally, the administrative and support service sector as well was characterised by an overrepresentation of movers compared to nationals (8 % against 4 %).

As in 2022, manufacturing remained the largest sector in 2023, employing around 16 % of the EU movers, in line with the figure of nationals and slightly above the one of TCNs. This is followed by wholesale and retail trade and construction, both employing around 11 % of EU movers. Human health and social work and accommodation and food service account for 9 % of the employment participation of EU movers.

Movers' employment composition has evolved over time. For instance, the information and communication sector has increased by almost 47 % between 2018-2023, and is now similar, in percentage terms, to the one for nationals and TCNs. Similarly, the transportation and storage sector increased roughly 37 % over the same period. Instead, the number of movers employed in the activities of households as employers[140] has declined by about a third (Table 14). It is plausible that many of these movers have switched to working in the human health and social work field, where employment has increased by around 23 %.

Figure 41: Employees by nationality group and economic sector in the EU, 2023



Note: The economic sectors are ranked from highest to lowest for nationals.

Source: EU-LFS 2024, custom extraction by Milieu.

[140] This category includes e.g. maids, cooks, waiters, valets, butlers, laundresses, gardeners, gatekeepers, stable-lads, chauffeurs, caretakers, governesses, babysitters, tutors, secretaries.

Table 14: EU movers by economic sector of employment in the EU, 2018-2023

	2018	2019	2020	2021	2022	2023	Trend
Employed working-age movers (thousands)							
Manufacturing	920	969	942	971	1018	1028	
Human health and social work	471	509	526	523	556	582	
Administrative and support service activities	438	457	410	428	519	506	
Transportation and storage	368	416	352	419	480	505	
Professional	263	280	300	302	323	343	
Information and communication	185	195	204	221	259	272	
Activities of households as employers	300	279	236	212	202	198	
Other service activities	144	153	155	172	177	168	

Note: Dots in the trend lines indicate the highest and lowest values in the reference period. Only NACE1D sectors with significant differences in 2018-2023 are included.

Source: EU-LFS 2024, custom extraction by Milieu.

3. The social conditions of movers in the EU

3.1. Introduction

The European Union's commitment to the free movement of workers, enshrined in Article 45 of the Treaty on the Functioning of the European Union (TFEU), has been a cornerstone of European integration and the single market. This fundamental principle has enabled millions of EU citizens to seek employment opportunities across Member States, contributing to economic growth and fostering cultural exchange[141]. However, ensuring fair labour mobility requires looking beyond employment statistics, but rather, to examine the broader social conditions experienced by mobile workers and their families.

This multidimensional approach has been underscored by key developments in EU policy over recent years, most notably the European Pillar of Social Rights (EPSR), proclaimed in 2017[142], and its accompanying Action Plan[143], adopted in 2021. The EPSR and its Action Plan emphasise that economic and social progress must go hand in hand, ensuring that the benefits of mobility are equitably shared and that workers are protected against social exclusion. The COVID-19 pandemic highlighted the vulnerabilities faced by mobile workers, such as difficulties in accessing social benefits, healthcare, and adequate housing in their host countries[144], underscoring the importance of EU social security coordination in ensuring robust social protection across the EU-27[145].

In 2021, the European Commission revised the EU Social Scoreboard as part of the EPSR Action Plan, aiming to better monitor Member States' progress in implementing the Pillar's principle, focusing on employment, skills, and social inclusion. The new headline targets set for 2030 – raising the employment rate to 78 %, at least 60 % of adults participating in training annually, and reducing the number of people at risk of poverty or social exclusion by at least 15 million – reflect the EU's increased ambition to 'maintain its leadership in terms of promoting people's well-being'[146]. As part of this aim, the EPSR Action Plan aims to 'build fair and resilient economies and support inclusive growth'[147], while ensuring fair labour mobility for workers by better 'protecting and improving their rights and working conditions'[148].

In this context this chapter aims to provide a nuanced and multidimensional understanding of the social conditions experienced by mobile workers within the EU and EFTA countries. In doing so, it aims to respond to the following questions:

[141] European Parliament (2024). Free movement of workers. Accessed here.

[142] Rasnaca, Z. (2017). Bridging the gaps or falling short? The European Pillar of Social Rights and what it can bring to EU-level policymaking. DOI: 10.13140/RG.2.2.32569.26724.

[143] European Commission (2021). The European Pillar of Social Rights Action Plan. Luxembourg: Publications Office of the European Union. DOI:10.2767/89.

[144] Rasnaca, Z. (2020). Essential but Unprotected: Highly Mobile Workers in the EU during the Covid-19 Pandemic. SSRN Electronic Journal. DOI: 10.2139/ssrn.3699377; Spasova, S., Ghailani, D., Sabato, S., Coster, S., Fronteddu, B., & Vanhercke, B. (2021). Non-standard Workers and the Self employed in the EU: Social Protection During the Covid-19 Pandemic. ETUI Research Paper – Report 2021.02. Accessed here.

[145] United Nations (2020). COVID-19 and social protection in Europe and Central Asia: A moment of opportunity to expand and strengthen social protection mechanisms to safeguard health, well-being and livelihoods, leaving no one behind. Accessed here.

[146] European Commission (2021). The European Pillar of Social Rights Action Plan. Luxembourg: Publications Office of the European Union. DOI:10.2767/89., p. 12.

[147] Ibid., p. 19.

[148] Ibid., p. 22.

- To what extent are mobile workers at risk of poverty and social exclusion? Are there differences across Member States?

- What is the level of educational attainment and participation in learning of mobile workers? How does it compare with the average population? Are there significant differences across Member States?

- What is the level of income inequality among mobile workers, and how has this evolved over time?

To answer these questions, this chapter analyses data from the Eurostat 'Statistics on Income and Living Conditions' (EU-SILC), focusing on indicators aligned with the EU Social Scoreboard where data availability allows. This chapter analyses data up to 2022, the latest year available during the research phase. Indicators of social conditions tend to show gradual rather than dramatic changes from year to year for different segments of the population, therefore working with these data is still considered useful.

It should be noted that while this chapter touches upon factors related to employment, it does not provide analysis on the unemployment rates of mobile persons in particular, as this aspect is covered extensively in the preceding chapter of this report (see Chapter 2).

The chapter is structured as follows: Section 3.2 focuses on the social protection and inclusion of mobile individuals, examining their risk of poverty and social exclusion, access to social transfers, and housing conditions. Section 3.3 examines the educational attainment and participation of mobile workers. Next, Section 3.4 looks at the extent of income inequality among mobile individuals compared to other groups. Finally, Section 3.5 provides conclusions.

Key findings

Poverty and social exclusion

- In most of the social indicators assessed, EU movers generally fare better than TCNs but are often in a weaker position compared to nationals.

- EU movers face a higher AROPE rate (27 %) compared to nationals (19 %) but fare better than TCNs (46 %) at the EU level. Similarly, the AROP rate for EU movers is 22 %, 7 pps higher than nationals, while their severe material and social deprivation rate is 8 %, 2 pps higher than nationals.

- The housing cost overburden rate is notably higher for EU movers, with 19 % experiencing housing costs exceeding 40 % of their disposable income in 2022. This rate is more than double that of nationals (8 %) and slightly below the level observed for TCNs (26 %).

Education of mobile individuals

- Tertiary education attainment among EU movers (aged 30-34) has increased from 35 % in 2017 to 39 % in 2022, and it is slight below that of nationals (ca. 43 %).

- Participation in formal education and training rates remain low for EU movers, at around 3 % from 2017 to 2022, comparable to nationals (4 %). However, TCNs have shown improvement, increasing from 4 % in 2017 to 7 % in 2022.
- The share of early leavers from education and training (ELET) rate for young EU movers (aged 18–24) stood at 22 % in 2022, nearly three times higher than nationals (8 %) but slightly lower than TCNs (26 %). Morover, 14 % of young EU movers (aged 15–29) were NEET (neither in employment nor in education and training), higher than nationals (11 %) but lower than TCNs (22 %). This rate decreased from 18 % in 2017.
- By 2023, 55 % of EU movers had basic or above-basic digital skills, nearly closing the gap with nationals (56 %). This represents progress from a 3-percentage point gap in 2021 to just 1 percentage point in 2023.

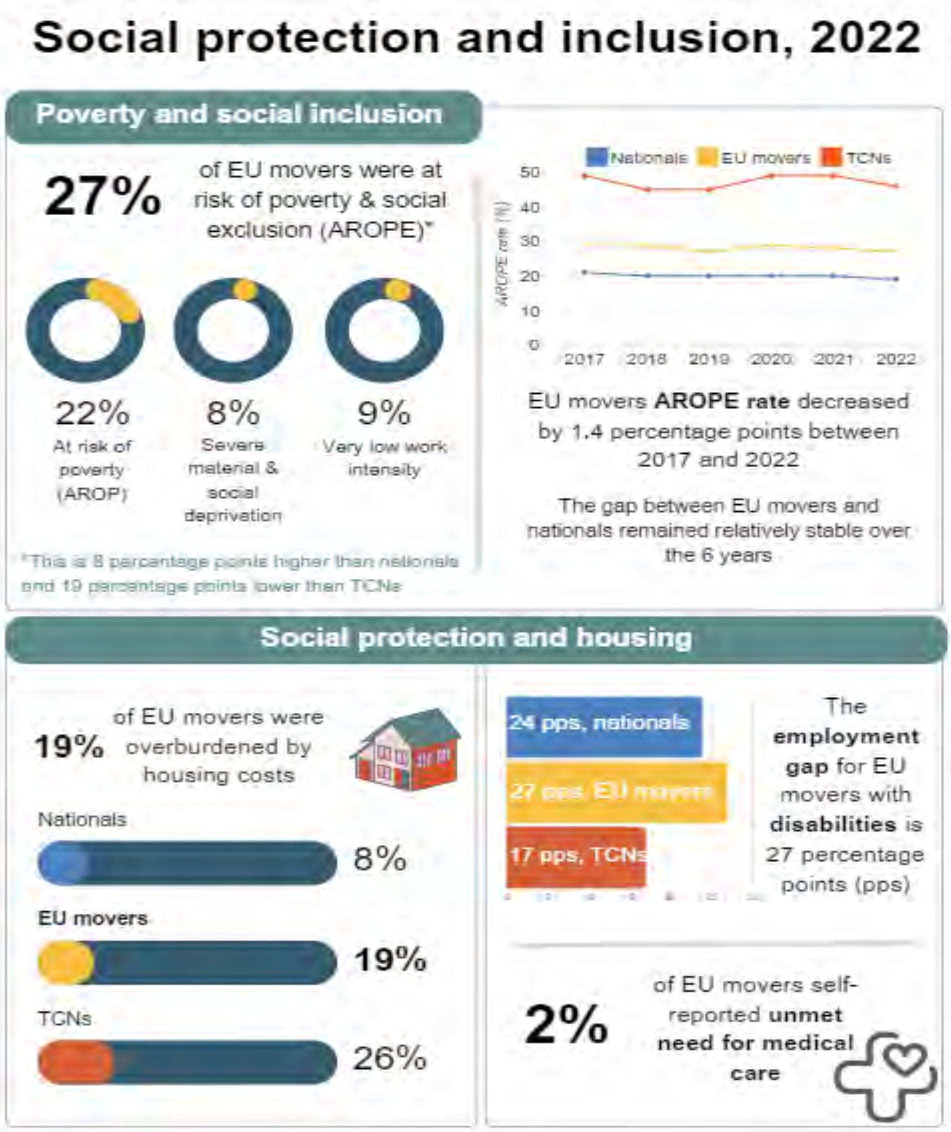
Income inequality

- The median income of EU movers has consistently been higher than that of nationals at the EU level, reaching EUR 20 714 in 2022 compared to EUR 19 506 for nationals.
- At the EU level, income inequality is slightly lower for EU movers (S80/S20 ratio of 7) compared to nationals (8).

3.2. Social protection and inclusion of mobile individuals

The social protection and inclusion of mobile workers are crucial components of a well-functioning EU labour market, aligning with the principles set forth in the EPSR. This section examines different dimensions of the social protection and inclusion of mobile individuals, including risks of poverty, material deprivation and work intensity in their households, aiming to answer the following research question: *To what extent are mobile workers at risk of poverty and social exclusion, and how do these patterns vary across Member States?*

Figure 42: Key findings at EU-level on social protection and inclusion, 2022



Source: Own representation with EU statistics on income and living conditions, Milieu calculations.

3.2.1. Poverty and social exclusion

At-risk-of-poverty and social exclusion (AROPE)

The at-risk-of-poverty-and-social-exclusion (AROPE) rate, which is the share of people who are either at risk of poverty, or severely materially and socially deprived, or living in a household with a very low work intensity[149], is an important indicator for understanding the social well-being of individuals. For EU movers, examining their AROPE rates can reflect their ability to integrate and thrive in their host countries.

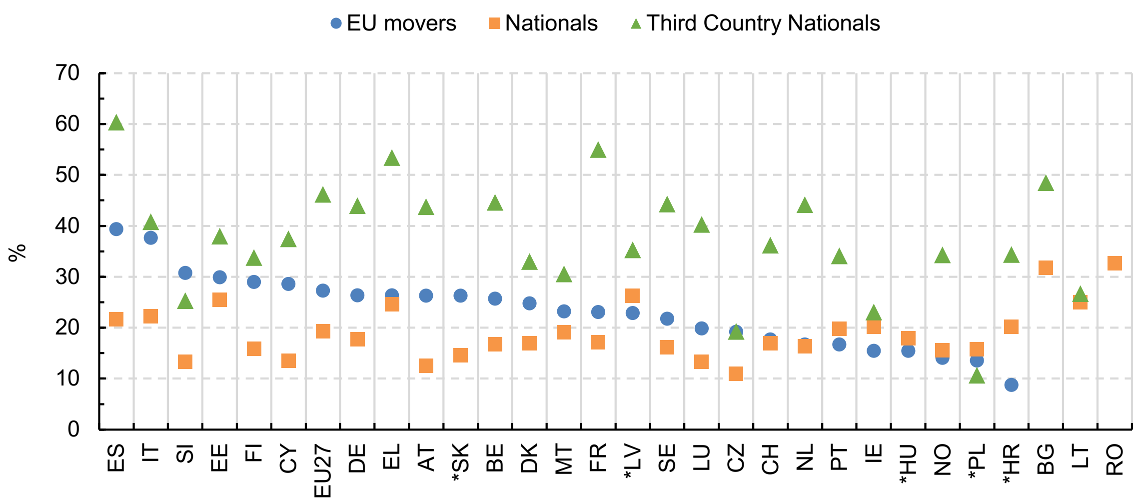
[149] Eurostat (2021). Glossary: At risk of poverty or social exclusion (AROPE). Accessed here.

EU movers and even more so TCNs[150] are considerably more likely to be at-risk-of-poverty or social exclusion than nationals living in the same country. In 2022, 27 % of EU movers were at risk of poverty and social exclusion, compared to 19 % of nationals and 46 % of TCNs.

Between 2017 and 2022, all groups, including EU movers, saw a slight decrease in AROPE rates. For EU movers, this reduction amounted to more than 1 pp, mirroring the progress seen among nationals.

At the country level, the situation varies considerably (Figure 43). In most Member States, EU movers face a substantially higher risk of poverty and social exclusion than nationals, albeit typically lower than TCNs. In Spain, EU movers have an AROPE rate 18 pps higher than nationals and also in Italy, Slovenia, Cyprus, Austria, and Finland, there are considerable gaps in the AROPE rate between the two groups. In countries like Greece, Switzerland, and the Netherlands, the difference in AROPE rates between nationals and EU movers is relatively small (ranging from <1 to 2 pps), and in Ireland and Portugal, EU movers actually have lower AROPE rates than nationals.

Figure 43: AROPE by group of citizenship and country, age 18 and over, 2022



Note: Data on 'EU movers' is missing from Lithuania, Romania, Bulgaria, and Iceland. Data on 'Third Country Nationals' is missing from Romania, Slovakia, and Hungary. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (ilc_peps05n), Milieu calculations.

At-risk-of-poverty (AROP)

Focusing on income poverty, which is one of the three components of the AROPE indicator, provides additional insights into the situation of mobile people in the context of intra-EU labour mobility.

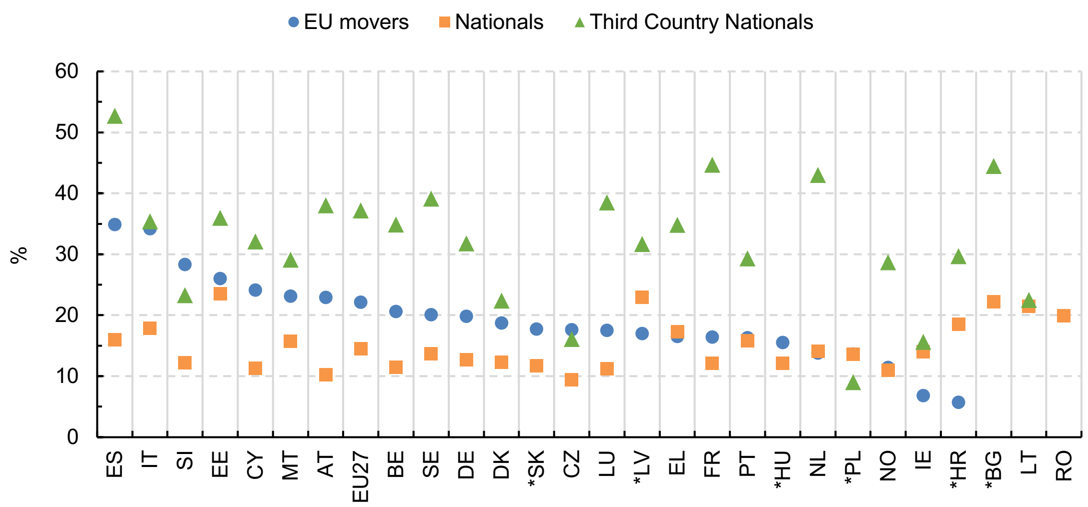
At the EU level, movers face a higher risk of income poverty compared to nationals, and lower risk than TCNs, mirroring the trend observed in the overall AROPE rates (Figure 43). In 2022, 22 % of EU movers were at risk of poverty, compared to 15 % of nationals.

[150] Due to limitations in the data collection of the EU Statistics on Income and Living Conditions (SILC), in the case of this chapter, TCNs include citizenship of all countries outside the EU-27, including EFTA countries (i.e. Switzerland, Iceland and Norway).

Once again, all three groups saw a modest fall in the number of people AROP over the 2017-2022 period.

The AROP rates follow similar patterns across countries, with EU movers generally facing higher risks than nationals in most Member States (Figure 44). However, there are notable exceptions, such as Ireland and Greece, where EU movers exhibit lower AROP rates than nationals.

Figure 44: AROP by group of citizenship and country, age 18 and over, 2022



Note: Data on 'EU movers' is missing from Lithuania, Romania, Bulgaria, and Iceland. Data on 'Third Country Nationals' is missing from Romania, Slovakia, and Hungary. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (ilc_li31), Milieu calculations.

Interestingly, in Portugal, while the share of EU movers AROPE is lower than nationals, the share of EU movers that are only AROP is instead slightly higher than that of Portuguese nationals. This may suggest that non-income factors play a more important role in the overall risk of poverty and social exclusion for EU movers in Portugal, thereby reinforcing the importance of considering multiple dimensions of social conditions when assessing to what extent and where fair labour mobility between Member States is achieved.

Severe material and social deprivation (SMSD)

Severe material and social deprivation (SMSD) is the key component of the AROPE indicator that provides valuable insights into the lived experiences of individuals facing extreme economic hardship. In turn, examining SMSD rates among EU movers compared to nationals and TCNs can further the understanding of the multidimensional nature of poverty and social exclusion faced by mobile populations within the EU.

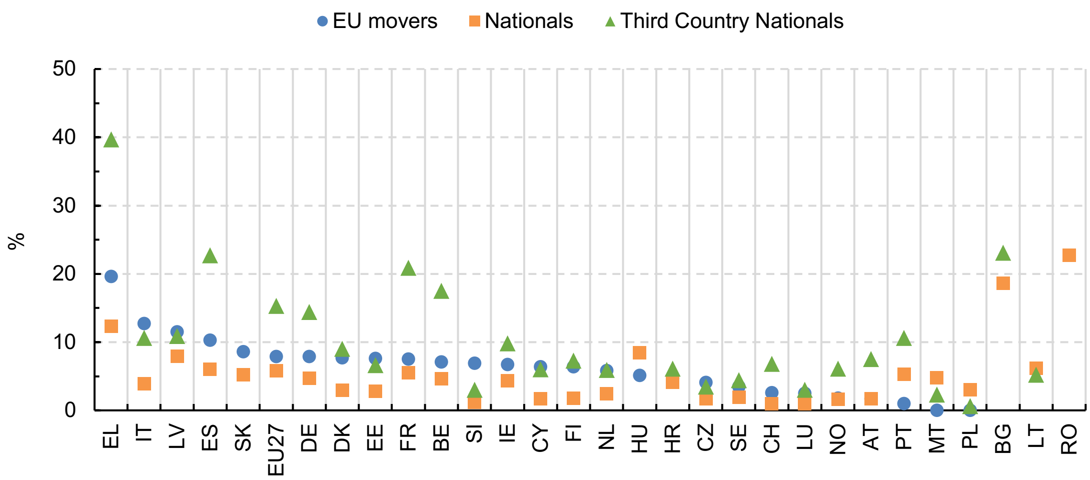
In 2022, the SMSD rate for EU movers stood at 8 % at the EU level – 2 pps higher than for nationals (6 %), yet considerably lower than for TCNs (16 %). This again confirms the general observation that EU movers face greater material hardship than nationals, but are generally better off than TCNs.

Shifting the focus to country-level data, there is a wide variation in SMSD rates for EU movers in 2022 (Figure 45), with Greece and Italy standing out with the highest rates at 20 % and 13 % respectively, while Norway, Austria and Portugal have rates between

1 % and 2 %. These disparities point to different experiences of EU movers in different national contexts and labour markets, but may also be influenced by movers' characteristics, such as education, skills, or employment sectors, which interact with national circumstances to shape outcomes.

Comparing EU movers to nationals within countries uncovers differences that are in line with the broader trends observed in this section so far. In most countries, EU movers have higher SMSD rates than nationals, with particularly large gaps in Italy (9 pps), Greece (7 pps), and Slovenia (6 pps). These differences suggest that EU movers in these countries face greater challenges in accessing basic necessities and participating fully in society compared to their national counterparts. However, Portugal and Hungary deviate from this trend, with EU movers faring better than nationals.

Figure 45: SMSD by group of citizenship and country, age 18 and over, 2022



Note: Data on 'EU movers' is missing from Lithuania, Romania, Bulgaria, Poland, and Iceland. Data on 'Third Country Nationals' is missing from Romania, Slovakia, and Hungary. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (ilc_mdsd15), Milieu calculations.

These figures show that, so far, mobile EU citizens have a higher risk of severe material and social deprivation than nationals. To further explore the social conditions of EU movers, this section continues by examining another key factor contributing to poverty and social exclusion: very low labour intensity.

Very low work intensity

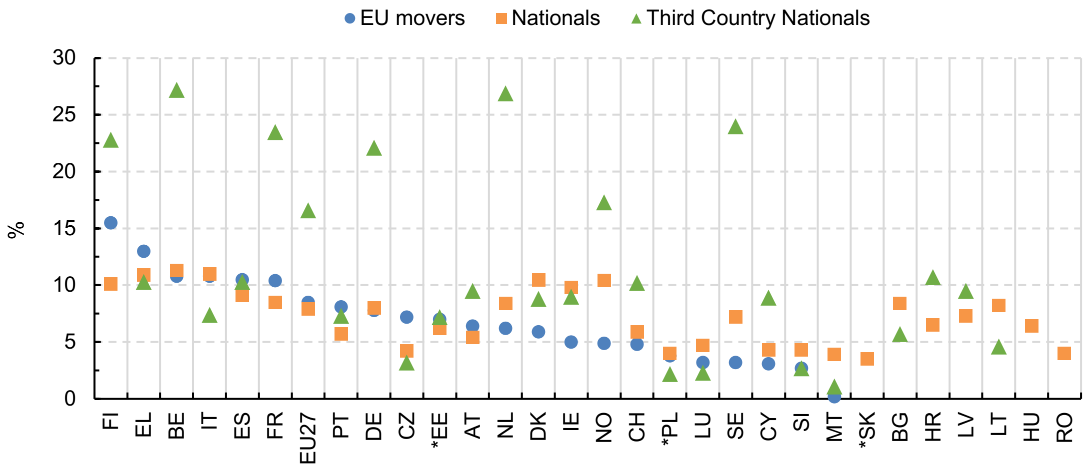
Capturing the share of persons living in a household with very low work intensity provides further insights into the labour market integration of different population groups, including EU movers. This measure is particularly relevant in the context of the EPSR, which emphasises the importance of inclusive labour markets and adequate income support.

At EU level, the share of people living in households with very low work intensity has fluctuated for all groups over the 2019-2022 period[151]. In line with the trends highlighted earlier in this section, EU movers have consistently maintained a position between nationals and TCNs, increasing from just under 8 % in 2019 to 9 % in 2022 and 10 % in 2021, suggesting heightened labour market challenges as a result of the COVID-19

[151] Data is not available for 2017 and 2018.

pandemic. Nationals were most stable, fluctuating between 8 % to 9 % over the observed period, while TCNs saw a sharp increase from 14 % in 2019 to 20 % in 2021, before declining slightly to 17 % in 2022.

Figure 46: Share (%) of people living in households with very low work intensity, age 18-64, by citizenship and country, 2022



Note: Data on 'EU movers' is missing from Croatia, Latvia, Lithuania, Romania, Bulgaria, Slovakia, and Iceland. Data on 'Third Country Nationals' is missing from Romania, Iceland, and Hungary. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (ilc_lvhl15n), Milieu calculations.

Country-level data for 2022 reveals significant variations in very low work intensity rates across Member States (Figure 46). For EU movers, the highest rates were observed in Finland at 16 %, followed by Greece, Belgium, Italy, and Spain from 13-11 %, notably above the EU-27 average of 9 %. In contrast, Malta, Slovenia, and Cyprus, reported the lowest rates for EU movers, ranging between 1 % and 3 %.

In most northern European countries, EU movers had lower rates of very low work intensity compared to nationals. This was particularly pronounced in Norway (5 pps), Denmark (5 pps), Ireland (5 pps), and Sweden (4 pps). This trend suggests that EU movers attracted to these countries are more likely to be economically active and to find employment opportunities aligned with their skills and qualifications.

While the indicator of very low work intensity provides valuable insights into the labour market integration of EU movers, it does not capture the quality of employment or the adequacy of income for those in work. In order to better understand this, the following subsection examines the in-work-at-risk-of-poverty rate.

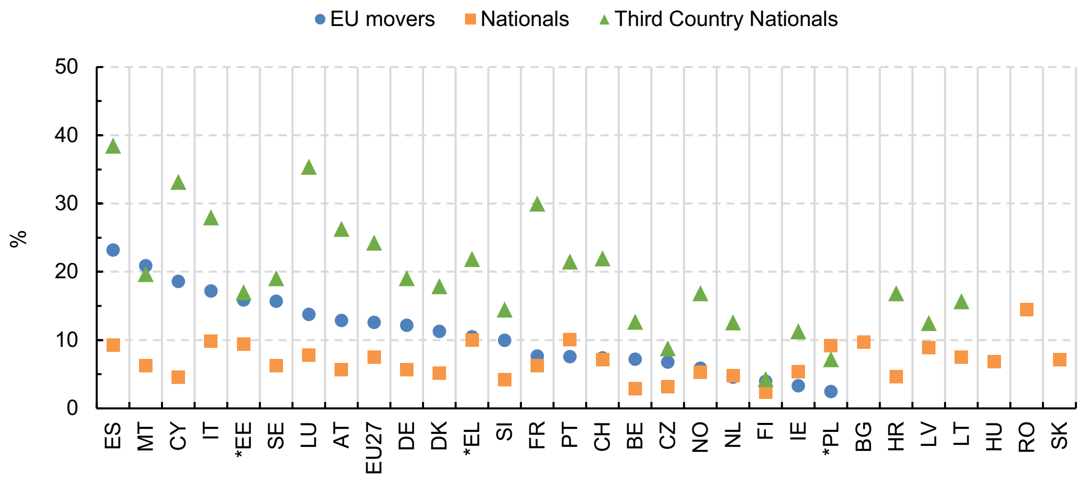
In-work-at-risk-of-poverty rate

The in-work-at-risk-of-poverty rate is an indicator that sheds light on the share of employed individuals who, despite being in work, are still at risk of poverty. This measure, therefore, provides insights into the quality of employment and the adequacy of wages earned – key principles highlighted in the EPSR.

At the EU level, EU movers faced a higher in-work poverty risk (13 %) in 2022 compared to nationals (8 %), a trend that persisted over the 2017-2022 period. Despite some improvements across all groups – EU movers, nationals, and TCNs – the gap between movers and their national counterparts remains substantial, suggesting that mobile EU citizens continue to face challenges in accessing quality employment at the same level as the native population that can provide a decent income.

Looking into the situation at Member State level (Figure 47): in 2022, EU movers in Spain faced an in-work poverty risk of 23 %, significantly above the EU-27 average of 13 %. Conversely, the situation for EU movers in Ireland, Finland, and the Netherlands appeared to be much better, with in-work poverty rates between 3 % and 5 %.

Figure 47: In-work at-risk-of-poverty rate, ages 18 and over, by group of citizenship and country, 2022



Note: Data on 'EU movers' is missing from Bulgaria, Croatia, Latvia, Lithuania, Romania, Slovakia, and Iceland. Data on 'Third Country Nationals' is missing from Bulgaria, Hungary, Romania, Slovakia, and Iceland. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (ilc_iw15), Milieu calculations.

In particular Finland, the Netherlands, and Ireland have demonstrated strong outcomes for EU movers across one or more indicators through this section (severe material and social deprivation rate, households facing very low work intensity, and in-work-at-risk-of-poverty rate).

The gap between EU movers and nationals is especially pronounced in most of the Member States where the in-work poverty risk is highest, in general Member States that face a more challenging labour market environment more broadly: Spain (15 pps), Malta (14 pps), Cyprus (14 pps) and Italy (7 pps).. Interestingly, in a few countries such as Ireland, the Netherlands, and Portugal, EU movers fare better than nationals in terms of the in-work poverty risk. These findings confirm the patterns observed throughout this section on the social protection and inclusion of movers.

Spain, Italy, and Cyprus consistently show higher risks for EU mobile citizens across multiple indicators, with significant disparities between EU movers and nationals in areas such as overall poverty rates, severe material deprivation, and in-work poverty. In contrast, the Netherlands and Ireland often show more favourable outcomes for EU movers, with smaller gaps or even cases where movers outperform nationals on certain measures.

3.2.2. Social protection and housing

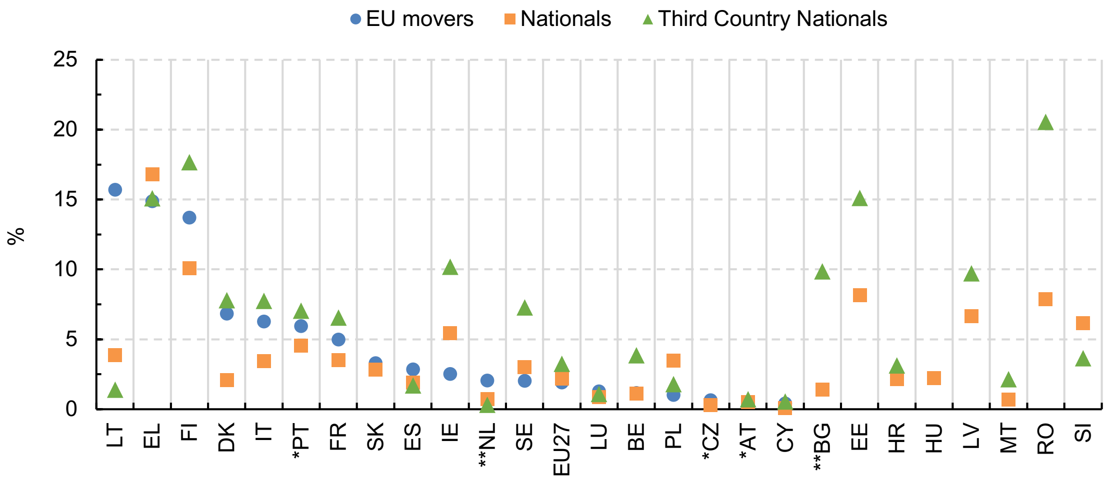
Social protection and housing are fundamental pillars of the EPSR, with several principles aiming at ensuring adequate social protection coverage and access to essential services for all. Accordingly, this section examines several key dimensions of social protection and inclusion of mobile populations, including access to healthcare, integration of people with disabilities into the labour market, and housing affordability. In doing so, the aim is to assess how effectively social protection systems serve mobile populations and to identify potential gaps in coverage or access.

Self-reported unmet need for medical care

Access to medical care is a core dimension of social protection and a key indicator for assessing the degree of social inclusion of a given population group. While data availability at EU level, makes it impossible to identify long-term trends, it reveals that in 2022, EU movers and nationals reported similar rates of unmet medical need, at 2 % for each group. However, this EU-level snapshot masks considerable differences between the two groups, in certain Member States (Figure 48).

In 2022, EU movers in Lithuania reported the highest rate of unmet medical need at 16 % – a stark contrast to the 4 % rate among Lithuanian nationals. Greece and Finland also saw high rates for EU movers at 15 % and 14 % respectively, although rates for nationals in these countries were also quite high compared to the other countries for which data are available. Notably, the high rates observed in Greece are consistent with earlier findings in this chapter and point to wider socio-economic challenges affecting the mobile population. Conversely, EU movers in Czechia, Cyprus and Austria show rates of unmet medical need, at around 1 %.

Figure 48: Share (%) of people self-reporting unmet need for medical care, ages 16 and over, by group of citizenship and country, 2022



Note: Data on ‘EU movers’ is missing from Bulgaria, Estonia, Croatia, Hungary, Hungary, Latvia, Malta, Romania, Slovenia, Switzerland, Norway, Germany, and Iceland. Data on ‘Third Country Nationals’ is missing from Hungary, Slovakia, Czechia, Switzerland, Norway, Germany, and Iceland. Countries marked by ‘*’ indicate the use of 2021 data for EU movers in place of missing 2022 data, while ‘**’ indicates the use of 2021 data for TCNs.

Source: EU statistics on income and living conditions, Milieu calculations.

These challenges around access to medical care for EU movers take on added significance when considering the next key dimension of social inclusion – the employment disability gap.

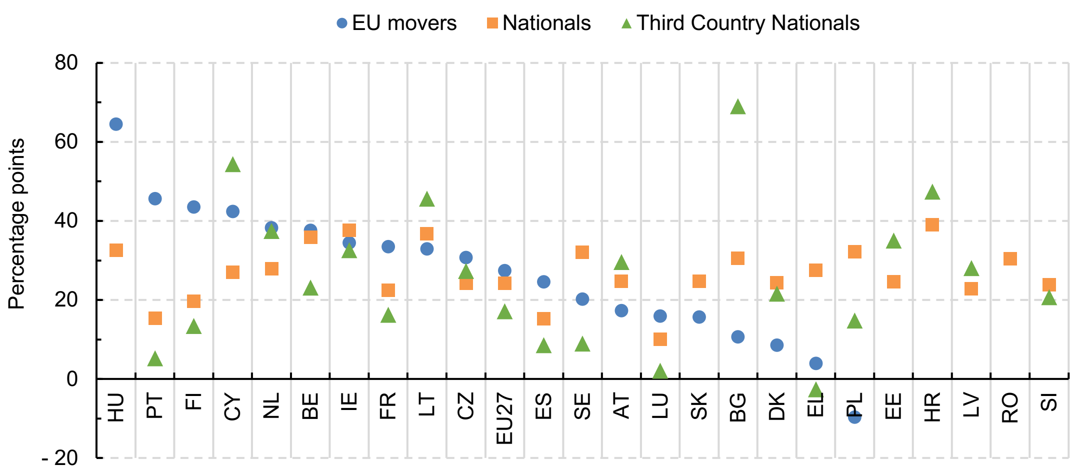
The employment disability gap

The employment disability gap – which measures the difference in employment rates between people with and without disabilities – is a key indicator of the labour market integration of persons with disabilities and the effectiveness of social protection systems in supporting their workforce participation. Addressing this gap is in line with Principle 17 of the EPSR Action Plan, which emphasises the importance of fostering the inclusion of people with disabilities into the labour market[152].

In 2022, the prevalence of disability among EU movers aged 20-64 in EU-27 was broadly similar, at 19 %, to that of the resident population (20 %)[153], suggesting that movers face comparable rates of activity limitation as their national counterparts. However, their labour market outcomes show more pronounced disparities. EU-level data for 2022 reveal that EU movers with disabilities faced a slightly larger employment gap (27 pps) compared to nationals (24 pps), with both groups showing minimal shifts over the two-year period concerned[154]. TCNs consistently showed the smallest employment gap among the three groups, at 17-18 pps between 2021 and 2022.

Looking more closely at individual countries, the situation differs from one country to another. For example, some of the most common destinations of EU movers, such as France and Spain, have an employment disability gap for the mobile population that is generally in line with the EU average. At the same time, the gap in 2022 deviates more for some smaller and less common destinations of movers, notably Hungary, Finland, and Cyprus, where the gap is higher for EU movers in each case (Figure 49). Interestingly, Poland even showed a negative gap of -10 pps.

Figure 49: Employment disability gap by citizenship, ages 20-64, by group of citizenship and country, 2022



[152] European Commission (2021). The European Pillar of Social Rights Action Plan. Luxembourg: Publications Office of the European Union. DOI:10.2767/89.

[153] According to Eurostat: Level of disability (activity limitation) by sex, age and citizenship (hlth_silc_28), Milieu calculations.

[154] Data for this indicator is limited to the years 2021-2022.

Note: Data on 'EU movers' is missing from Estonia, Croatia, Latvia, Romania, Slovenia, Italy, Malta, Germany, Switzerland, Norway, and Iceland. Data on 'Third Country Nationals' is missing from Romania, Italy, Malta, Switzerland, Norway, Germany, and Iceland.

Source: EU statistics on income and living conditions, Milieu calculations.

Finland's high employment gap for disabled EU movers (44 pps) is particularly noteworthy when considered alongside its high rate of unmet medical need for EU movers (14 %) as discussed in the previous section, suggesting that mobile persons with disabilities in Finland may face multiple, compounding challenges. In some other Member States, e.g. Bulgaria, Denmark, Greece and Poland, the employment gap of disabled EU movers notably lower than for nationals.

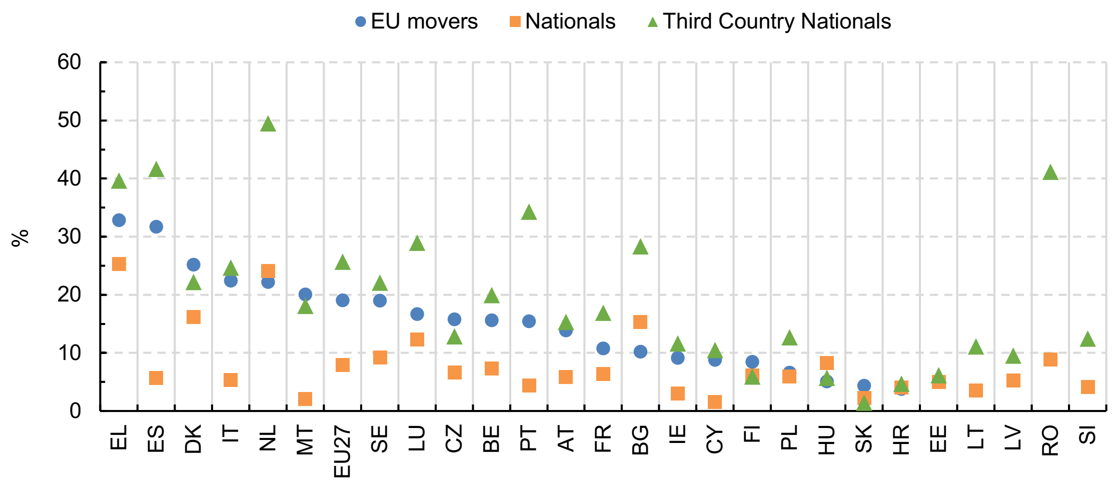
Housing cost overburden rate

Access to affordable housing is a fundamental right enshrined in Principle 19 of the EPSR[155]. Yet, for many EU movers and nationals alike, finding affordable housing remains a challenge. The housing cost overburden rate, which measures the percentage of the population living in households where total housing costs exceed 40 % of disposable income, sheds light on this key issue.

At the EU level in 2021/2022, movers faced considerably higher housing cost overburden rates compared to nationals, albeit lower than TCNs. In 2022, 19 % of EU movers were overburdened by housing costs, compared to only 8 % of nationals. While this figure is lower than the 26 % rate faced by TCNs, it highlights the significant challenges faced by EU movers, and more generally mobile people, in finding affordable housing.

Diving deeper into the country-level data for 2022 reveals substantial variation in housing cost overburden rates for EU movers across Member States (Figure 50). The southern European countries of Greece (33 %) and Spain (32 %) have the highest shares of EU movers overburdened by housing costs by a notable margin, followed by Denmark (25 %), Italy (22 %), and the Netherlands (22 %).

Figure 50: Housing cost overburden rate by group of citizenship and country, 2022



Note: Data on 'EU movers' is missing from Estonia, Lithuania, Latvia, Romania, Slovenia, Germany, Switzerland, Norway, and Iceland. Data on 'Third Country Nationals' is missing from Switzerland, Norway, Germany, and Iceland.

[155] European Commission (2021). The European Pillar of Social Rights Action Plan. Luxembourg: Publications Office of the European Union. DOI:10.2767/89.

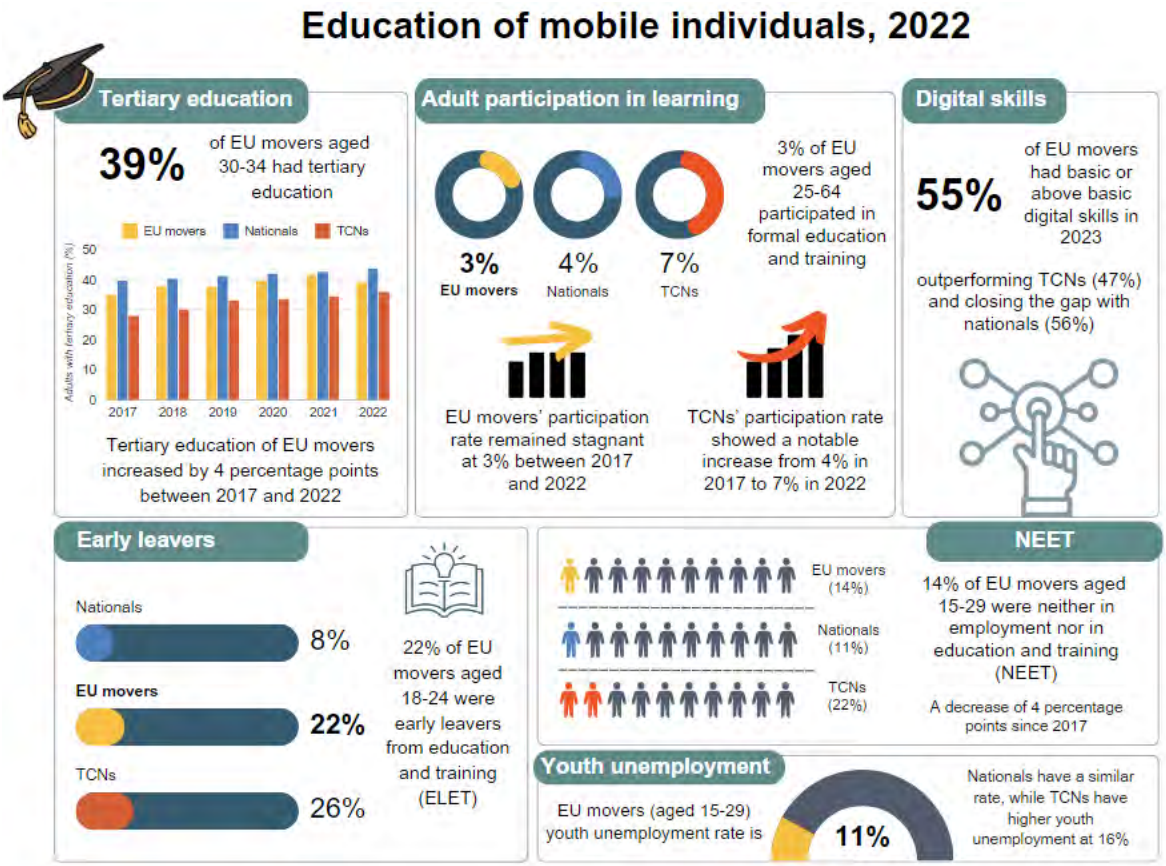
Source: EU statistics on income and living conditions, Milieu calculations.

The gap between EU movers and nationals, is rather pronounced in some Member States, e.g., in Spain the housing cost overburden rate for EU movers is 26 pps higher than for nationals, in Malta it is 18 pps and in Italy it is 17 pps. These values are also substantially higher than the EU average gap (11 pps). These differences indicate that EU movers in some countries face particular challenges in accessing affordable housing.

3.3. Education of mobile individuals

Education is a cornerstone of social inclusion and economic opportunity. The EPSR Action Plan sets the target of at least 60 % of adults participating in training each year, to be achieved by 2030[156].

Figure 51: Key findings at EU-level on social protection and inclusion, 2022



Source: Own representation with EU statistics on income and living conditions, Milieu calculations.

Tertiary education

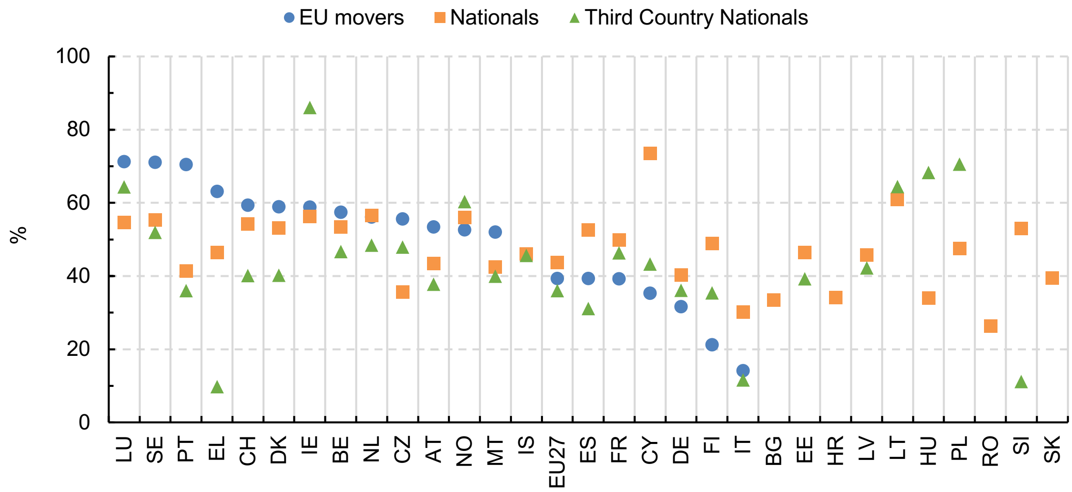
Examining tertiary education attainment among EU movers compared to nationals, sheds light on the human capital of mobile workers and gives an indication of their

[156] European Commission (2021). The European Pillar of Social Rights Action Plan. Luxembourg: Publications Office of the European Union. DOI:10.2767/89.

potential to contribute to the knowledge economies of their host countries, aligning with the EPSR Action Plan's emphasis on skills development.

At the EU level, tertiary education attainment among 30–34-year-olds has steadily increased across all groups from 2017 to 2022. Notably, EU movers have risen from 35 % in 2017 to 39 % in 2022. However, the EU-level figures mask significant variations across Member States (Figure 52). Luxembourg, Sweden and Portugal stand out with over 70 % of EU movers holding tertiary degrees, substantially exceeding their national rates. Conversely, in Germany, Spain, France, Italy, Cyprus and Finland, EU movers have markedly lower tertiary attainment rates than nationals. The gap is starkest in Cyprus (38 pps) and Finland (28 pps). In Italy only 14 % of EU movers hold a tertiary degree compared to 30 % of nationals. The qualification levels of movers are closely linked to the attractiveness of the respective segments of the national labour market.

Figure 52: Adults aged 30-34 with tertiary educational attainment, by country and group of citizenship, 2022



Note: Data on ‘EU movers’ is missing from Lithuania, Romania, Estonia, Croatia, Latvia, Lithuania, Hungary, Poland, Slovenia, and Slovakia. Data on ‘Third Country Nationals’ is missing from Bulgaria, Croatia, Romania, and Slovakia. Low data reliability is indicated by ‘*’.

Source: EU statistics on income and living conditions (edat_lfse_03), Milieu calculations.

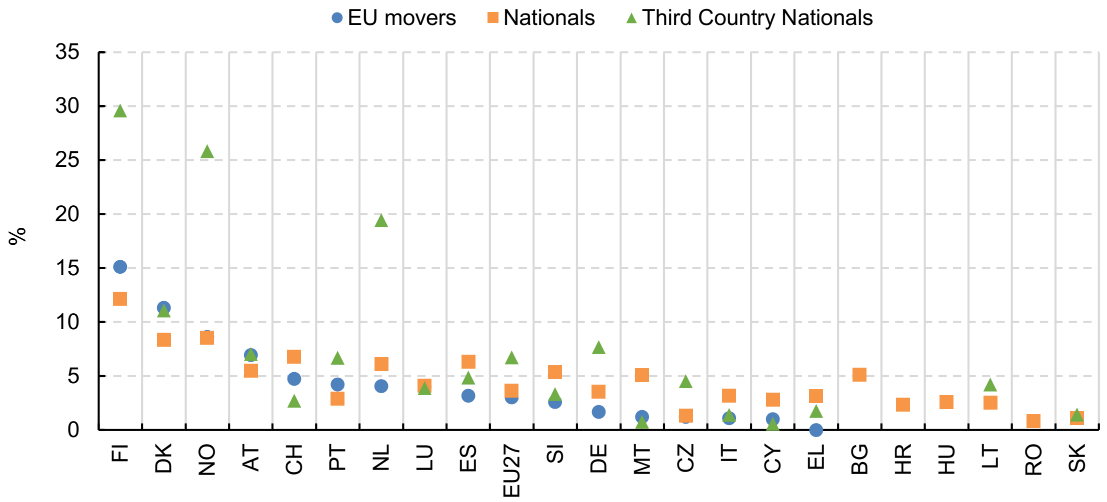
Adult participation in learning

Adult participation in learning gives an indication of participation in lifelong learning and skills development, essential to adapt to the dynamic and changing demands of the labour market and to ensure social inclusion[157]. Accordingly, this section examines the trends in formal education and training participation among adults aged 25-64.

At the EU level, participation rates in formal education and training for EU movers and nationals are fairly similar at around 3 % and with little fluctuation over the period 2017 to 2022. TCNs, however, showed a rose from 5 % in 2018 to 8 % in 2020, before falling slightly back to 7 % in the remaining two years observed (Figure 53).

[157] European Commission (2021). The European Pillar of Social Rights Action Plan. Luxembourg: Publications Office of the European Union. DOI:10.2767/89.

Figure 53: Share of adults aged 25-64 participating in formal education and training, by country and group of citizenship, 2022



Note: Data on 'EU movers' is missing from Poland, Bulgaria, Estonia, Croatia, Hungary, Ireland, Iceland, Lithuania, Latvia, Romania, Sweden, and Slovakia. Data on 'Nationals' is missing from Poland, Estonia, Ireland, Iceland, Latvia, and Sweden. Data on 'Third Country Nationals' is missing from Bulgaria, Estonia, Ireland, Croatia, Latvia, Hungary, Poland, Romania, Iceland, and Norway.

Source: EU-SILC, Milieu calculations.

The lower rates for EU movers compared to TCNs suggest that they may face fewer immediate pressures or incentives to engage in formal education or upskilling through training, possibly due to better recognition of their existing qualifications across EU Member States[158].

A look at the country-level shows that the northern countries of Denmark, Finland and Norway have the highest participation rates among EU movers, ranging from 9 % in Norway to 15 % in Finland, well above the EU-27 average of 3 %. In contrast, several southern and eastern European countries, such as Czechia, Greece, Italy and Cyprus, report participation rates as low as 1 % to even less.

For the six countries with the highest participation rates of EU movers, these rates are either equal to or higher than those of nationals of the same countries, an exception being Switzerland, where nationals show the highest participation in formal education and training.

Early leavers from education and training

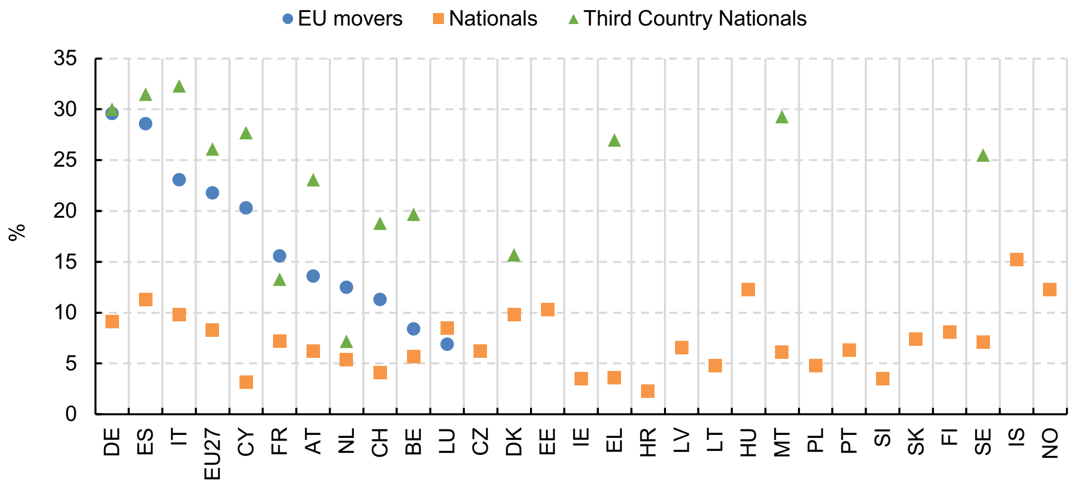
The share of early leavers from education and training (ELET) amongst the 18-24 year old can provide insights into the challenges they may face, such as reduced opportunities for employment, limited chances to participate fully in society, and greater risk of social exclusion. ELET refers to individuals in this age group who have completed at most lower secondary education (ISCED level 2) and are not engaged in further education or training. This typically includes those who have left formal education before achieving upper secondary qualifications or without pursuing additional training or apprenticeship opportunities.

[158] Del Rey Poveda, A., Stanek, M., García-Gómez, J., & Orfao, G. (2024). Patterns of overeducation among highly educated mobile intra-EU workers, 2005--2016: Enlargement, financial crisis, and mobility. International Journal of Comparative Sociology. DOI: 10.1177/00207152241229400.

In 2022, the ELET rate for young EU movers in the EU-27 stood at 22 %, nearly three times higher than the rate for nationals (8 %), and only slightly lower than that of TCNs at 26 %. While both EU movers and nationals saw a decrease of 1 pp between 2017 and 2022, the persistent gap highlights potential structural barriers facing young mobile EU citizens.

At the country level, the shares of ELET for young EU movers in 2022 varied from 7 % in Luxembourg to 30 % and 29 % in Germany and Spain respectively (Figure 54). Gaps in the ELET rates for movers and nationals are particularly pronounced in Germany (21 pps), Spain (17 pps), and Cyprus (17 pps), while in Belgium or Luxembourg the differences are very small. Over the period 2017-2022 in five countries a decrease of ELET rates for EU movers was registered – in five other countries an increase was registered[159].

Figure 54: Share of EU movers, nationals and third country nationals (18-24 year) leaving education and training early by country of residence, 18–24-year-olds, 2022



Note: Data on 'EU movers' is missing from Bulgaria, Denmark, Estonia, Ireland, Croatia, Latvia, Lithuania, Hungary, Poland, Portugal, Romania, Slovenia, Slovakia, Finland, Iceland, and Norway, while data is missing from Czechia, Greece, Malta, and Sweden. Data on 'Third Country Nationals' is missing from Bulgaria, Estonia, Ireland, Croatia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia, Iceland, Norway, Czechia, Luxembourg, Portugal, Slovenia, and from Finland. Low data reliability is indicated by '*'.

Source: Eurostat_sdg_04_10a, Milieu calculations.

While many countries have achieved the EPSR Action Plan's 2030 target of below 9 % ELET for nationals, this target has not been reached for movers.

Individuals with basic or above basic overall digital skills

The digital skills' indicator provides insights into the readiness of persons to navigate and thrive in an increasingly digitalised world. This composite indicator assesses individuals' proficiency in five areas: information and data literacy, communication and collaboration, digital content creation, safety, and problem-solving. It is measured by surveying individuals aged 16-74 about specific activities they perform online or with software, assuming that performing these activities indicates possession of the corresponding skills[160]. The indicator refers to the EPSR Action Plan's target of at least 80 % of those aged 16-74 having digital skills.

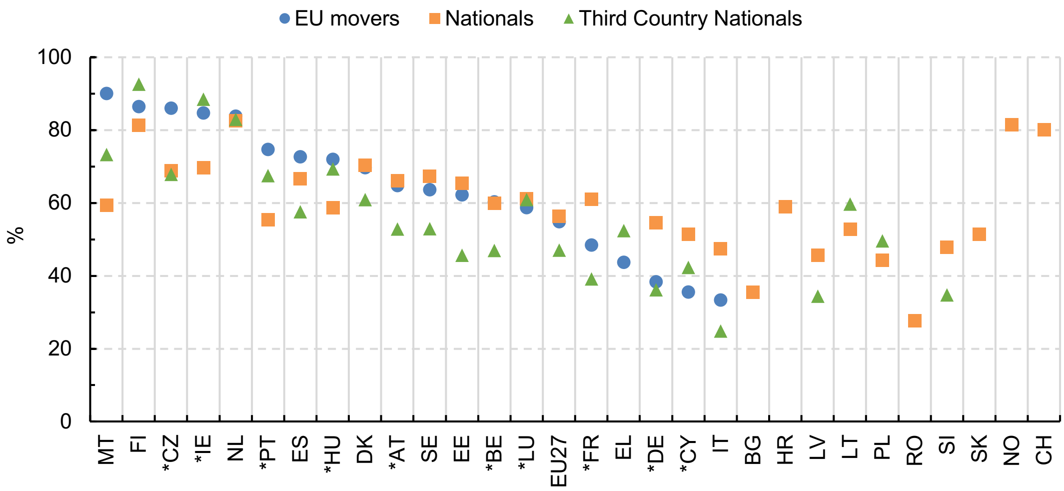
[159] Only among the 10 Member States for which data are available in 2017 and 2022.

[160] Data availability is limited to 2021 and 2023 as this is not an annually recurring dataset.

EU movers have made progress in closing the digital skills gap with nationals over the 2-year period observed: by 2023, 55 % of EU movers possessed basic or above basic overall digital skills, nearly on par with nationals (56 %), representing a narrowing of the gap from 3 pps in 2021 down to just 1 pp in 2023.

Looking at the country-level data reveals considerable variations in the digital skills of EU movers across Member States (Figure 55). In 2023, EU movers in Malta (90 %), Finland (86 %) and Czechia (86 %) had the highest levels of basic or above basic digital skills, compared to just 33 % in Italy, 36 % in Cyprus, and 38 % in Germany.

Figure 55: Individuals with basic or above basic overall digital skills by group of citizenship and country, 16-74 years old, 2023



Note: Data on 'EU movers' is missing from Bulgaria, Croatia, Latvia, Lithuania, Poland, Romania, Slovenia, Slovakia, Iceland, Norway, and Switzerland. Data on 'Nationals' is missing for 2023 from Greece and Iceland. Data on 'Third Country Nationals' is missing from Iceland for 2023. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (isoc_sk_dskl_i21), Milieu calculations.

In Italy, Cyprus and Germany, where EU movers have the lowest levels of digital proficiency[161], there are also high shares of young EU movers who are early leavers from education and training. The high rate of early school leaving among young EU movers in these countries may contribute to their lower acquisition of digital skills compared to their national counterparts[162].

In countries where EU movers had the highest share of digital skills, such as Malta, Finland, Czechia, Ireland, and the Netherlands, they also outperformed nationals of the same country. This may suggest that these labour markets are attracting and providing opportunities for mobile workers with the necessary digital skills to take advantage of these opportunities[163].

Data limitations prevent a comprehensive analysis of digital skills proficiency across all Member States, as data for some countries and groups are missing. The available data indicates some progress in closing the overall digital skills gap between movers and

[161] Italy and Germany are also the countries where a fairly low share of movers has tertiary education.

[162] van Kessel, R., Wong, B. L. H., Rubinić, I., O'Nuallain, E., & Czabanowska, K. (2022). Is Europe prepared to go digital? making the case for developing digital capacity: An exploratory analysis of Eurostat survey data. PLOS Digital Health, 1(2), e0000013.

[163] Crisan, G-A., Popescu, M.E., Militaru, E., & Cristescu, A. EU Diversity in Terms of Digitalization on the Labor Market in the Post-COVID-19 Context. *Economies, 11*(12), 293. DOI: 10.3390/economies11120293.

nationals between 2021 and 2023. However, both groups still fall short of the 80 % target defined in the EPSR Action Plan.

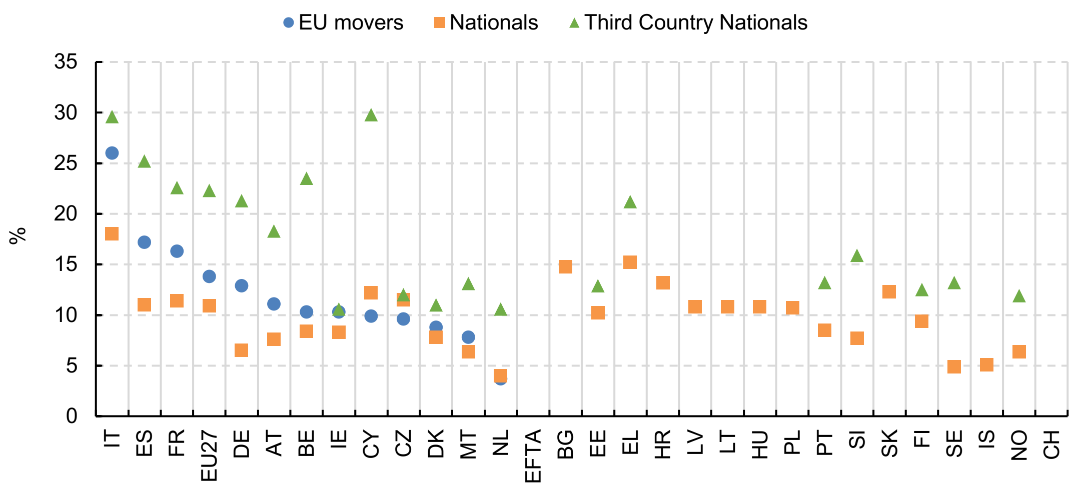
Young people neither in employment nor in education and training (NEET)

The share of young people (15-29 years of age) neither in employment nor in education and training (NEET) is another key indicator for assessing the challenges faced by youth in transitioning into the labour market. The ESPR Action Plan aims to reduce this rate to 9 % by 2030.

In 2022, the NEET rate for young EU movers stood at 14 %, which was 3 pps higher than the rate for nationals (11 %), but considerably lower than that of TCNs (22 %).The NEET rate for young EU movers has decreased from 18 % in 2017, notwithstanding a temporary increase during the COVID-19 pandemic, while the share of national NEETS decreased from 13 % to 11 % over the same period.

At country level, NEET rates for young EU movers in 2022 varied considerably, ranging from 4 % in the Netherlands to 26 % in Italy (Figure 56). However, data are only available for 13 of the EU-Member States and EFTA countries.

Figure 56: NEET rate of movers by country and group of citizenship, 15-29 year olds, 2022



Note: Data on 'EU movers' is missing from Bulgaria, Estonia, Croatia, Latvia, Lithuania, Poland, Portugal, Romania, Slovenia, Slovakia, Finland, Greece, Sweden, Norway, and Switzerland. Data on 'Nationals' is missing from Switzerland 2022. Data on 'Third Country Nationals' is missing from Bulgaria, Croatia, Lithuania, Hungary, Romania, Slovakia, Latvia, Poland, and Switzerland. Low data reliability is indicated by '*'.

Source: Eurostat_sdg_08_20a, Milieu calculations.

In most countries for which data are available, EU movers had higher NEET rates than nationals, with the largest gaps observed in Italy (8 pps), Germany (6 pps) and Spain (6 pps).

These results reinforce some of the country-specific trends that emerged when looking at the educational dimensions of the social conditions of movers. In particular, we see that countries with the highest NEET rates among EU movers also tend to have the highest rates of early leavers from education and training. Italy, Germany, and Spain stand out in this regard – Italy has both the highest NEET rate (26 %) and one of the highest ELET rates (23 %) for EU movers, while Germany and Spain show similar patterns with high rates across both indicators. Meanwhile, countries such as the Netherlands and Luxembourg demonstrate stronger performance across both metrics, with the Netherlands having both the lowest NEET rate (4 %) and relatively low ELET rate (13 %) among EU movers, while Luxembourg shows similarly positive outcomes with an 8 % NEET rate and 7 % ELET rate. Taken together, these findings indicate that more needs to be done to address many of the identified persistent gaps before the EPSR Action Plan target of reducing the overall NEET rate to 9 % by 2030 can be achieved.

Youth unemployment

Examining and comparing the unemployment rate of young people (15-29 years of age) can inform about the progress towards the EPSR Action Plan's aim of tackling youth unemployment.

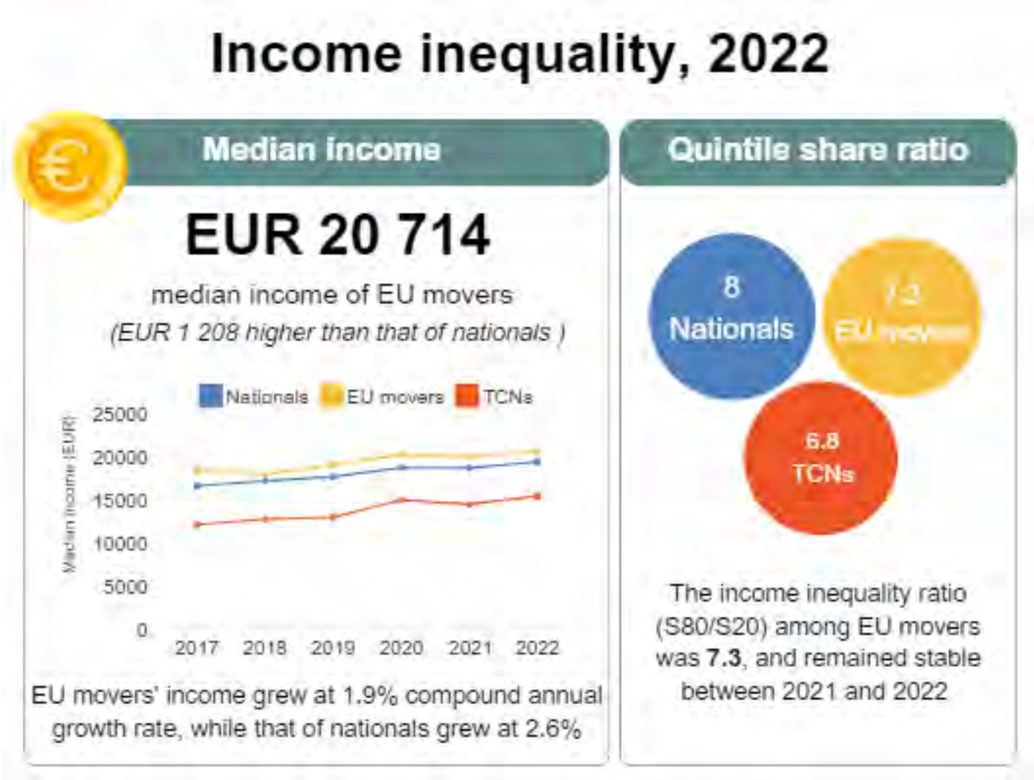
Consistent with many of the other indicators, the youth unemployment rate in 2022 was again highest for TCNs (16 %), while both EU movers and nationals had virtually identical youth unemployment rates at 11 %. Youth unemployment rates for EU movers and nationals remained closely aligned, differing by no more than 1 pp from 2017 to 2022. These rates mirrored overall unemployment trends: declining from 2017 to 2019, rising during the 2020 pandemic, and returning to or falling below pre-pandemic levels by 2022.

While limited data availability hinders a detailed analysis at Member State level, the results at EU level stress the importance of continued support in tackling youth unemployment.

3.4. Income inequality

Income disparities between EU movers and nationals offer insights into the extent to which mobile workers can achieve economic parity in their host countries, contributing to upward social convergence as envisioned in the EPSR Action Plan. The following analysis aims to answer the final question posed at the start of this chapter: *What is the level of income inequality among mobile workers and how has it evolved over time?*

Figure 57: Key findings at EU-level on income inequality, 2022



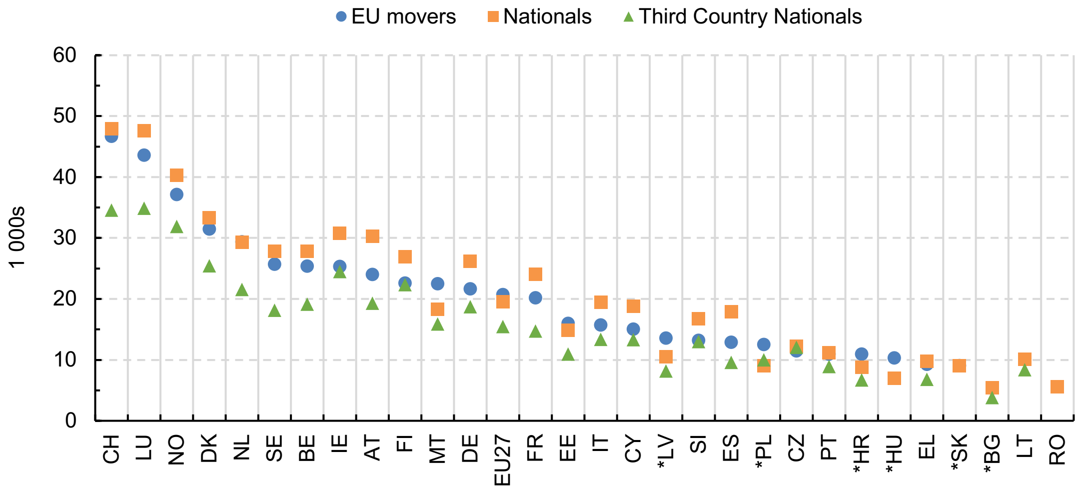
Source: Own representation with EU statistics on income and living conditions, Milieu calculations.

Median income

Comparing the median incomes of EU movers and nationals provides insights into income inequality between these groups. At the EU level, the median income of EU movers – i.e. the point of the income distribution where half earn more and half earn less – has consistently been higher than that of nationals between 2017 and 2022. In 2022, EU movers earned a median income of EUR 20 714, compared to EUR 19 506 for nationals. While both groups saw their incomes grow over the six-year period, nationals experienced a higher average annual growth rate at 2.6 %, compared to 1.9 % for EU movers. This in turn leads to an interesting statistical pattern: while EU movers typically earn less than nationals when compared within each Member State (as shown below), their EU-wide median income is higher. This apparent paradox reflects the migration pattern that movers tend to go to Member States with rather high-income levels, thereby raising their EU-wide median despite lower relative earnings within each country.

Shifting focus to the country level (Figure 58), Switzerland and Luxembourg stand out with the highest median incomes in 2022 for EU movers, at EUR 46 717 and EUR 43 629 respectively – more than double the EU-27 average of EUR 20 714.

Figure 58: Median income by group of citizenship and country (in EUR 1 000s), 2022



Note: Data on 'EU movers' is missing from Romania, Lithuania, Bulgaria, and Iceland. Data on 'Nationals' is missing from Iceland for 2022. Data on 'Third Country Nationals' is missing from Romania, Slovakia, Hungary, and Iceland. Low data reliability is indicated by '*'.

Source: EU statistics on income and living conditions (ilc_di15), Milieu calculations.

While the median incomes of EU movers have increased in most Member States over the 2017-2022 period, there are some exceptions, e.g., in Finland, the median income of EU movers decreased from EUR 23 292 in 2017 to EUR 22 643 in 2022 and in France and Germany, it fell by less than EUR 1 000.

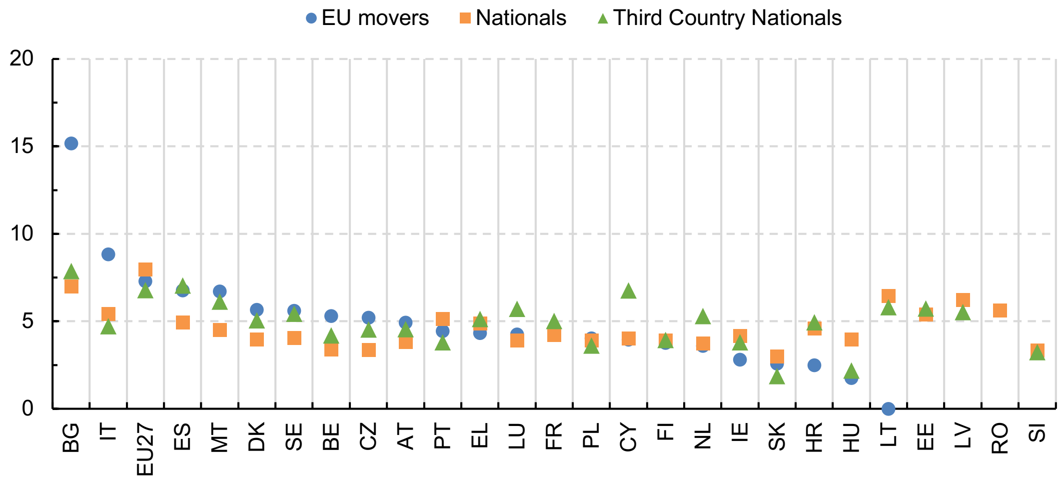
Quintile share ratio (S80/S20)

While median income provides insights into the central tendency of the income distribution, it does not capture income inequality. The income quintile share ratio (S80/S20) provides a more nuanced picture by comparing the total income received by the 20 % of the country's population with the highest income (top quintile) to that received by the 20 % of the country's population with the lowest income (lowest quintile). Income is measured as equivalised disposable income. A higher S80/S20 ratio indicates greater inequality and vice versa.

At EU level, data availability for this indicator is limited to 2021 and 2022. In both years, the quintile share ratio for nationals was 8, while it was 7 for EU movers.

In 2022, income inequality is among the highest for movers in Italy, with an S80/S20 ratio of 9, considerably higher than for nationals and TCNs (5 in both cases). Interestingly, movers residing in Italy also have some of the lowest median incomes of all the Member States observed, suggesting that while there are relatively few high-income earners, their incomes are well above the rest, even while movers in Italy generally face lower incomes overall, resulting in higher inequality than nationals.

Figure 59: Income inequality - quintile share rate (S80/S20) ratio, by group of citizenship and country, 2022



Note: Data on ‘EU movers’ is missing from Estonia, Latvia, Romania, Slovenia, Germany, Switzerland, Norway, and Iceland. Data on ‘Third Country Nationals’ is missing from Romania, Switzerland, Norway, Germany, and Iceland.

Source: EU statistics on income and living conditions, Milieu calculations, based on disposable income.

Extending this trend further, almost half of the Member States for which data are available (12 out of 22) have higher income inequality among EU movers than nationals, with the gap in the S80/S20 ratio being widest in the countries with the highest inequality among movers, namely Bulgaria (by 8), Italy (3), Spain (2), Malta (2), and Denmark (2).

Conversely, there are few cases where income inequality is considerably lower for EU movers than for their national counterparts. In Ireland, for example, the S80/S20 ratio for EU movers is 3, lower than for both nationals and TCNs (4), which is interesting given the relatively strong median incomes of EU movers in Ireland as noted in the previous section. Similarly, income inequality among EU movers is also lower in Croatia (2) and Hungary (2) than among their native-born peers (4 in both cases), although the relatively modest number of EU movers in these countries suggests that these differences should be interpreted with the appropriate caution.

3.5. Conclusion

A complex picture of the social situation of intra-EU movers emerges from this analysis. While EU movers generally fare better than TCNs on most of the social indicators assessed, they are often in a weaker position than nationals, albeit with notable differences across Member States and dimensions of socio-economic status.

This is particularly evident in the AROPE rate, where EU movers face considerably higher risks (27 %) than nationals (19 %) but lower than TCNs (46 %). Similar patterns are observed in other social protection indicators, such as severe material and social deprivation (8 % for EU movers versus 6 % for nationals) and housing cost overburden (19 % versus 8 %).

When it comes to housing-related indicators, EU movers are significantly more often overburdened by their housing costs than nationals. The situation is particularly acute in some southern European countries (in Spain 32 % of EU movers are overburdened by housing costs, in Greece 33 %). These housing challenges occurred often together with other socio-economic vulnerabilities (high correlation with AROPE rates).

The educational dimension presents a very mixed picture. While EU movers show strong performance in the acquisition of digital skills in some countries e.g. Malta (90 %) and Finland (86 %), they show significant backlogs in others, e.g. Germany, Cyprus, and Italy (all below 40 %). With on average 55-56 % having at least basic digital skills, both, EU movers and nationals, remain well below the EPSR Action Plan's 2030 target of 80 %, with rates around 55-56 % for both populations.

Furthermore, participation in lifelong learning and formal training among EU movers remains low, with only modest engagement compared to TCNs in some cases. This trend is reflected in the early leaving rates from education and training (ELET), where EU movers face higher risks than nationals (22 % compared to 8 % for nationals). The persistently higher NEET rates for EU movers (14 % compared to 11 % for nationals) also underscore the challenges young mobile workers face in fully integrating into host labour markets.

Despite these challenges, EU movers perform relatively well in terms of income. In 2022, their median income at the EU level was EUR 20 714, higher than the EUR 19 506 earned by nationals. Additionally, the quintile share ratio, an indicator of income inequality, was lower for EU movers than for nationals in both 2021 and 2022, though significant variation exists across Member States.

Overall, while data limitations posed some challenges, particularly for detailed Member State-level or trend analyses, the available data is sufficiently robust to draw meaningful conclusions. The findings underscore the complexity of the social situation faced by EU movers, revealing diverse outcomes shaped by national contexts, individual characteristics, and structural factors. Young movers, in particular, emerge as a group facing persistent barriers to integration in host countries. High rates of early school leaving (ELET) and NEET status among young movers highlight challenges in accessing education and transitioning into stable employment. Furthermore, the low participation of EU movers in lifelong learning suggests gaps in opportunities or incentives for upskilling, which could hinder their ability to adapt to evolving labour market demands. Addressing these challenges is essential, as they can compound over time, restricting movers' ability to adapt to changing labour market demands and fully participate in society.

4. Mobility of healthcare workers

4.1. Introduction

As of Q1 2024, human health activities employed 12.8 million workers in the 27 Member States of the European Union[164]. That is 6.4 % of all workers within the European Union. Other sectors, such as manufacturing (15.7 %) and wholesale and retail trade (13.3 %) comprise larger portions of EU workers. Nevertheless, if it was not apparent before, the COVID-19 pandemic highlighted to all European citizens the critical nature of healthcare provision.

The EU has on average, the highest rate of healthcare workers per 10 000 inhabitants – the preferred indicator of the World Health Organisation (WHO). For the most recent year with available data, six of the top ten countries worldwide in terms of number of doctors per 10 000 inhabitants were in the EU[165].

Table 15: Medical workers per 10 000 Inhabitants[166]

Medical doctors				Nursing and midwifery personnel			
Rank	**Country**	**Per 10 000**	**Year of data**	**Rank**	**Country**	**Per 10 000**	**Year of data**
1	Cuba	94.3	2021	1	**Finland**	521.6	2021
2	Monaco	88.9	2020	2	**Sweden**	217.0	2021
3	**Sweden**	71.5	2021	3	**Belgium**	208.9	2022
4	**Belgium**	63.9	2022	4	*Norway*	188.9	2021
5	**Greece**	63.7	2021	5	*Switzerland*	187.6	2021
6	**Portugal**	57.7	2021	6	*Iceland*	159.5	2022
7	Georgia	56.1	2022	7	**Ireland**	143.4	2022
8	**Austria**	55.1	2022	8	Australia	137.1	2021
9	*Norway*	51.7	2021	9	Japan	124.5	2020
10	**Lithuania**	51.3	2022	10	**Germany**	123.0	2021

Note: Bolded countries are EU Member States. Italicised countries are EFTA countries.

Source: World Health Organization.

164 Eurostat extract of lfsq_egan22d on 22 July 2024. Human health activities is a sub-section of the European Classification of Economic Activities (NACE) that includes activities related to short and long stays in hospitals that provide diagnostic and medical treatments, both general and specialised medical consultations and treatments, and services performed by paramedical practitioners. Does not include personal healthcare workers.

165 Data downloaded from the World Health Organization on 20 September 2024 https://www.who.int/data/gho/data/indicators/indicator-details/GHO/medical-doctors-(per-10-000-population)

166 Only countries with data from 2020 and beyond were included.

If looking at the top 20, that number jumps to 11 EU countries, and even reaches 14 with EFTA countries included (Table 15). A similar picture emerges if one looks at the number of nursing and midwifery personnel[167]. Given this context, the topic of healthcare worker mobility shall be looked at in this report, following a previous analysis in the 2017 annual report on intra-EU labour mobility[168].

At present, the state of healthcare and its provision by healthcare workers is generally positive, however, there are growing challenges that may alter this situation and place greater focus on the role EU movers play in the healthcare sector. These challenges include an emerging shortage of healthcare workers, an ageing European population, and shifting priorities.

Firstly, there is a shortage of healthcare workers with the skills needed. The OECD's Skills for Jobs database identifies 15 Member States, plus Switzerland and Norway, where medicine knowledge is a 'hard to find' skill[169]. This shortage has also been identified in academic literature with no less than 13 empirical publications attempting to quantify the current or future shortages in healthcare professions in various Member States[170]. Concurrently, there is a lack of digital skills amongst healthcare workers. As early as 2016, there was a call between public and private organisations for more emphasis on digital skills for healthcare professions[171]. This skills gap continues to be highlighted as Europe's healthcare moves toward using more digital technologies[172]. Acknowledging this gap, in 2022 the EU and the European Health Management Association launched BeWell, a project to upskill and reskill European health workers[173].

Second, Europe is ageing at an accelerating pace. Medical advancements have prolonged life for many, requiring greater care for an age group that is growing each year. Eurostat's population projections forecast an 8 % growth of the 65 and older population in the EU over the next five years, and another 8 % in the following five years[174]. That means 16 million more Europeans over the age of 65 over the next decade (section 4.2.1 will present Member State level projections). At the other end of the population projections, the less than 15 years old population will shrink by five million over the next decade. There are multiple inferences to be made from this demographic shift with specific implications for healthcare workers. Overall, a decreasing working-age population needing to support increasing healthcare costs creates an imbalance that has effects on the labour force, not only those caring for the elderly population, but for broader tax base, including the shrinking of the labour tax base[175]. As the general population ages, so too do healthcare workers, leading to concerns around staffing, knowledge transfer, and, in some cases, the calling back of retired healthcare workers[176]. A longer-

[167] Data downloaded on 20 September 2024 https://www.who.int/data/gho/data/indicators/indicator-details/GHO/nursing-and-midwifery-personnel-(per-10-000-population)

[168] See: Fries-Tersch, et al. (2018b), '2017 annual report on intra-EU labour mobility', European Commission (DG EMPL), Brussels.

[169] OECD (2024), Skills for Jobs database [Accessed on 23 September 2024]. 'Hard to find skills' are identified when employers cannot recruit staff with the necessary skills in the labour market at the standard rate and working conditions.

[170] Parzonka, K., Ndayishimiye, C., & Domagała, A. (2023), Methods and tools used to estimate the shortages of medical staff in european countries—scoping review, *International Journal of Environmental Research and Public Health*, 20(4), 2945.

[171] European Health Parliament (2016), Digital Skills for Health Professionals.

[172] Work in Health Foundation (2024), Addressing skills needs in the European health sector : Skills gaps, solutions, and strategies for VC-startup cooperation.

[173] EU and EHMA (2022), BeWell, available at: https://bewell-project.eu/

[174] Eurostat population projections, baseline scenario (PROJ_23NP), downloaded 9 July 2024.

[175] Cristea, M., Noja, G. G., Stefea, P., & Sala, A. L. (2020), The impact of population aging and public health support on EU labor markets. International journal of environmental research and public health, 17(4), 1439.

[176] Kurashvili, M., Reinhold, K., & Järvis, M. (2023), Managing an ageing healthcare workforce: a systematic literature review. Journal of Health Organization and Management, 37(1), 116-132.

living society also requires specialised geriatric care. There is evidence that Europe does not have a sufficiently sized, nor skilled healthcare worker population to care for its elderly citizens[177].

Finally, in early 2024 European Members of Parliament voted to repurpose EUR 1 billion from the EU4Health programme, which was introduced during the pandemic[178]. At the national level, the percentage of government spending on healthcare in 2022 is close to or less than the relevant spending in 2019 for the majority of Member States[179]. Only 12 Member States spent more than 0.5 pp more in 2022 than in 2019. Examining the percentage of government spending on healthcare from 2015 to 2019 (see Table 16), reveals that 13 Member States recorded little to no growth and some even experienced a decrease in the percent of government expenditure on healthcare[180],[181].

Table 16: Pre- COVID-19 government spending on healthcare as a percentage of GDP for the 9 largest economies in Europe

	2015	2016	2017	2018	2019	2020	2021	2022	2015/2022 PP Change	Trend
Germany	7.2	7.2	7.1	7.2	7.3	8.5	8.7	8.5	1.3	
France	8.1	8.1	8.1	8.0	8.0	8.9	9.2	9.1	1.0	
Italy	7.0	6.9	6.8	6.8	6.8	7.9	7.4	7.1	0.1	
Spain	6.2	6.1	6.0	6.0	6.1	7.6	7.2	6.9	0.7	
Netherlands	7.7	7.2	7.3	7.3	7.4	8.3	8.5	7.5	-0.2	
Poland	4.7	4.7	4.7	4.8	4.9	5.4	5.8	5.3	0.6	
Sweden	7.0	7.0	7.1	7.2	7.1	7.5	7.5	7.1	0.1	
Belgium	7.8	7.6	7.6	7.6	7.6	8.7	8.6	8.1	0.3	
Ireland	5.2	5.2	5.0	4.8	4.8	5.5	5.2	4.9	-0.3	

Source: Eurostat, general government expenditure by function (COFOG) (gov_10a_exp), custom extraction by Milieu.

Faced with these challenges, this report highlights the role that EU movers play in the EU's healthcare professions. Figure 60 shows how numbers and shares of EU movers in healthcare (excluding personal care) have changed since 2016. Germany remains the country with the largest share of EU movers in this sector. However, across all countries the total number of EU movers is down. In 2023, 209 000 EU movers accounted for 2.4 % of the 8.5 million healthcare professionals in EU and EFTA countries, comparing to 3.5 % of movers in the EU active working age population. In the same year, 4 % of the healthcare workers in the EU were TCNs, corresponding to their higher share in the working age population.

[177] Michel, J. P., & Ecarnot, F. (2020), The shortage of skilled workers in Europe: its impact on geriatric medicine. European geriatric medicine, 11(3), 345-347.

[178] Euronews. (2024, February 23). MEPs greenlight health budget cuts, with deferral. https://www.euronews.com/health/2024/02/23/meps-greenlight-health-budget-cuts-with-deferral

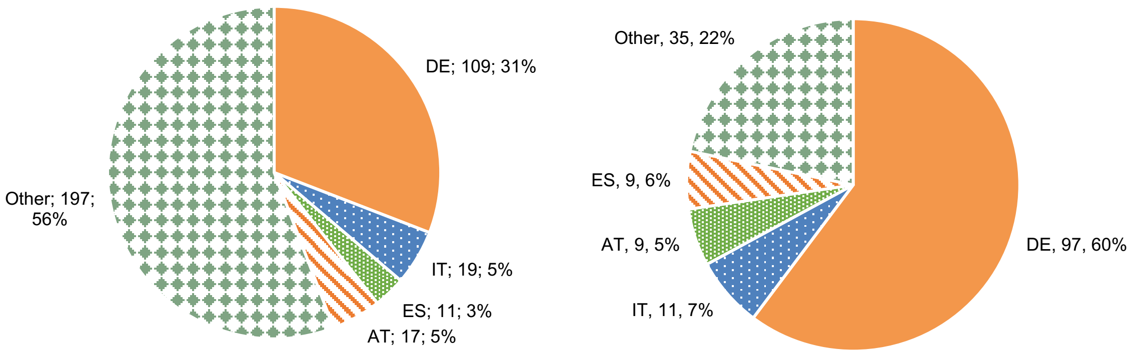
[179] Eurostat, General government expenditure by function (COFOG) (gov_10a_exp).

[180] Rechel, B. (2019), Funding for public health in Europe in decline?. Health Policy, 123(1), 21-26.

[181] Little growth to no growth is defined as no more than 0.3 percentage point increase.

Figure 60: Number of EU-movers in healthcare professions (excluding personal care workers), 2016 vs. 2023

Panel a) 2016 **Panel b) 2023**



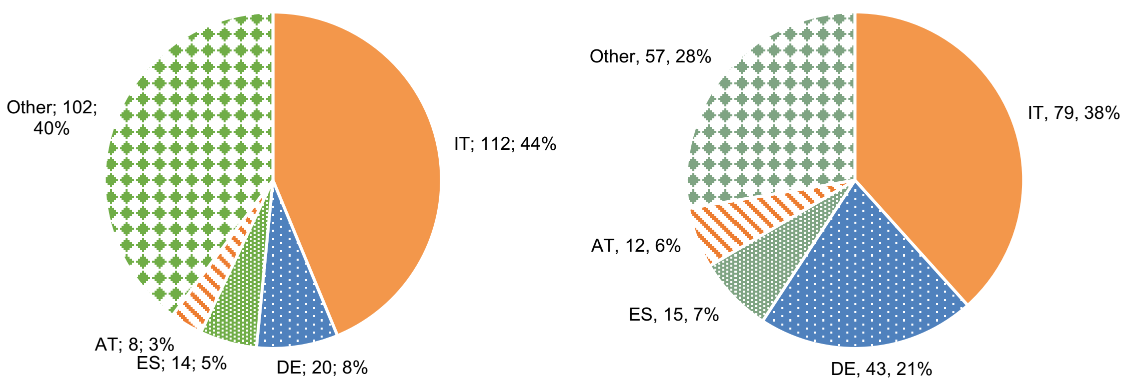
Note: Data in 1 000s. The included professional categories are Medical Doctors (221), Nursing and Midwifery Professionals (222), and Nursing and Midwifery Associate Professionals (322). Data from 2022 replaced missing 2023 data for Nurses/Midwives in Belgium, Other Health Associates in Czechia, Medical Doctors in France, Medical Doctors and Nurse/Midwife Associates in Luxembourg, and Medical Doctors in the Netherlands. The Other category in the 2016 figure includes the United Kingdom, which is not present in the 2023 figure.

Source: EU-SILC 2024, custom extraction by Milieu.

Turning to personal care workers, in 2023, the 206 545 EU movers accounted for 4.3 % of the 4.4 million personal care workers in EU and EFTA countries. At the same time, TCNs made up 10 % of all personal care workers. Italy remains the top destination for EU movers working in the personal care sector, see Figure 61. Germany is the Member State with the second highest number of personal care workers who are EU movers. As with the healthcare professionals highlighted above, the total number of personal care workers is down.

Figure 61: Stock of personal care workers, 2016 vs. 2023

Panel a) 2016 **Panel b) 2023**



Note: Data in 1 000s. The included professional categories Personal Care Workers in Health Services (532). Data from 2022 replaced missing 2023 data in Czechia. The Other category in the 2016 figure includes the United Kingdom, which is not present in the 2023 figure.

Source: EU-SILC 2024, custom extraction by Milieu.

This research seeks to explore the role of EU movers within the broader context of the EU healthcare sector. The chapter will seek to answer the following research questions:

- Are EU movers filling shortages in the healthcare sector in Member States?
- Who are these EU movers?
- Could these movers be contributing to the shortages experienced in their home counties? Are any of these EU movers returning to their home countries?
- Who are the returnees?

Box 5. Data: methodology and caveats

This chapter examines the situation of EU movers in healthcare professions, plus personal care work, across EU Member States, where data are available. This chapter builds on data from the EU-LFS for the period 2017 - 2023, using categories from the International Standard Classification of Occupations (ISCO-08). The professional categories include Medical Doctors (221), Nursing and Midwifery Professionals (222), Nursing and Midwifery Associate Professionals (322), and Personal Care Workers in Health Services (532)[182]. The size of these categories in the EU in 2023 was: personal care workers 4.2 million, nurse/midwife associates 2.6 million, medical doctors 1.8 million, and nurse/midwife 1.7 million.

For the remainder of the chapter, the term healthcare professionals will include personal care workers unless otherwise specified.

Regarding geographical coverage, 11 Member States reported LFS data meeting threshold limits on EU movers for some or all the professional categories in some or all the years (2017 to 2023), they include: Belgium, Czechia, Germany, Spain, France, Italy, Cyprus, Luxembourg, the Netherlands, Austria and Sweden, plus Switzerland[183]. In instances where data for this list of countries were not available in 2023, but were available in 2022, the latter was used to fill in the missing value. Three countries reported data on EU movers in healthcare professions, but only for selected years and were therefore not included in the detailed analysis. The countries were Ireland, which only reported the EU movers' population of personal care workers in 2017 and 2018; Malta, which only reported the number of EU movers working as medical doctors in 2018; and Norway, which only reported the number of EU movers working as personal care workers in 2020.

The absence of data from these EU and EFTA countries does not imply a complete lack of EU movers within the healthcare professions. Rather, it suggests that the populations fall below the minimum threshold required for reliable analysis.

A general note about healthcare systems in the EU, which may have an effect on the results shown here: differences exist in the role that private healthcare plays and the budgetary implications, differences in educational requirements/classifications, and how centralised or decentralised the provision of healthcare is. Each Member State

[182] International Labour Organization's ISCO-08 definition: "Personal care workers in health services provide personal care and assistance with mobility and activities of daily living to patients and elderly, convalescent, and disabled people in health care and residential settings." Available at: https://www.ilo.org/sites/default/files/wcmsp5/groups/public/@dgreports/@dcomm/@publ/documents/publication/wcms_172572.pdf.

[183] No data is available on EU movers in priniciple from 2017 to 2023 in 15 countries: Bulgaria, Denmark, Estonia, Greece, Finland, Croatia, Hungary, Iceland, Latvia, Lithuania, Poland, Portugal, Romania, Slovenia, and Slovakia.

has a unique approach to these various elements that combine to create a healthcare system and the resulting healthcare professionals.

Finally, the extent to which EU movers employed within the healthcare sector are underrepresented in national statistics remains uncertain. Anecdotal evidence suggests this population may be substantial. Reports indicate that, in Germany, a significant number of EU movers—primarily women over 50 from central and eastern European countries—are engaged as live-in care providers under legally ambiguous conditions[184]. Such living arrangements may exclude them from the scope of traditional labour survey sampling methodologies.

Key findings

- Female professionals constitute the majority of health workers in both groups - nationals and EU movers. However, in the 2017-2023 period, EU movers have a consistently higher proportion of women (90-94 %) compared to nationals (79-80 %).
- While the age distribution of national health workers remained stable between 2017 and 2023, EU movers are becoming increasingly older. The proportion of EU movers aged 45 and over increased from 51 % in 2017 to 62 % in 2023[185].
- EU movers in healthcare professions are more likely to have permanent contracts than nationals, with 96 % of EU movers having permanent contracts in 2023, compared to 86 % of nationals. This trend has strengthened since 2019, with EU movers seeing a continuous increase in permanent contracts.
- EU movers are more likely to be in full-time employment than nationals. In 2023, 74 % of EU movers were in full-time employment, compared to 68 % of nationals. This trend remained consistent from 2017 to 2023, except for a slight increase in full-time employment during the COVID-19 pandemic (79 % of EU movers worked full-time in 2020).
- Returnees present an opportunity for Member States to address healthcare shortages. In Spain in 2023 returnees were 3 % of all national healthcare workers and in Sweden it was 8 %.

4.2. Healthcare needs and shortages in Member States

Healthcare is an area of consistent shortages. According to the forthcoming 2024 EURES report, 21 EU countries reported a shortage of specialist doctors, 21 reported a

[184] EurActiv. (2023). Migrant workers keep German care system afloat, say experts. As part of European Special Report 'Health workers' intra-EU migration causes headaches', available at: https://en.euractiv.eu/wp-content/uploads/sites/2/special-report/Health-workers-intra-EU-migration-causes-headaches-1.pdf.

[185] This conclusion is drawn from a limited sample of countries with available data, as most countries only provided data for specific ISCO or age categories. Consequently, the findings of this analysis should be interpreted with caution. Nonetheless, in countries where data is available, there is a trend indicating that healthcare workers among EU movers tend to be older and part of an ageing workforce, in contrast to movers in other professions.

shortage of nursing professionals, 17 reported a general doctors' shortage, and 17 reported a healthcare assistants' shortage[186]. Country-specific research highlights examples of healthcare shortages in the face of an ageing population, including nursing shortages in Czechia[187], a predicted nursing shortage over the next decades in Austria[188], including inpatient and outpatient care services in German regions[189], and a low number of doctors and nurses in Slovakia[190].

Based on available data, recent years have seen vacancy rates in the human health and social work activities' sector rise in almost all Member States (Figure 62)[191]. From 2017 to 2023, the vacancy rate in the human health and social work activities' sector has increased in all but six EU and EFTA countries[192]. During this period, the vacancy rate increased by nearly or more than 2 pps in France, Austria, the Netherlands, and Germany, in the last three countries this resulted in vacancy rates of over 4 %.

[186] European Labor Authority (ELA) (2025). 'EURES Report on labour shortages and surpluses 2024', Publications Office of the European Union.

[187] Maresova, P., Prochazka, M., Barakovic, S., Baraković Husić, J., & Kuca, K. (2020, June). A shortage in the number of nurses—A case study from a selected region in the Czech Republic and international context. In Healthcare (Vol. 8, No. 2, p. 152). MDPI.

[188] Juraszovich, B., Rappold, E., and Gyimesi, M. (2023). Pflegepersonalprognose. Update bis 2025. Aktualisierung der Pflegepersonalbedarfsprognose bis 2030. Ergebnisbericht. Gesundheit Österreich, Vienna.

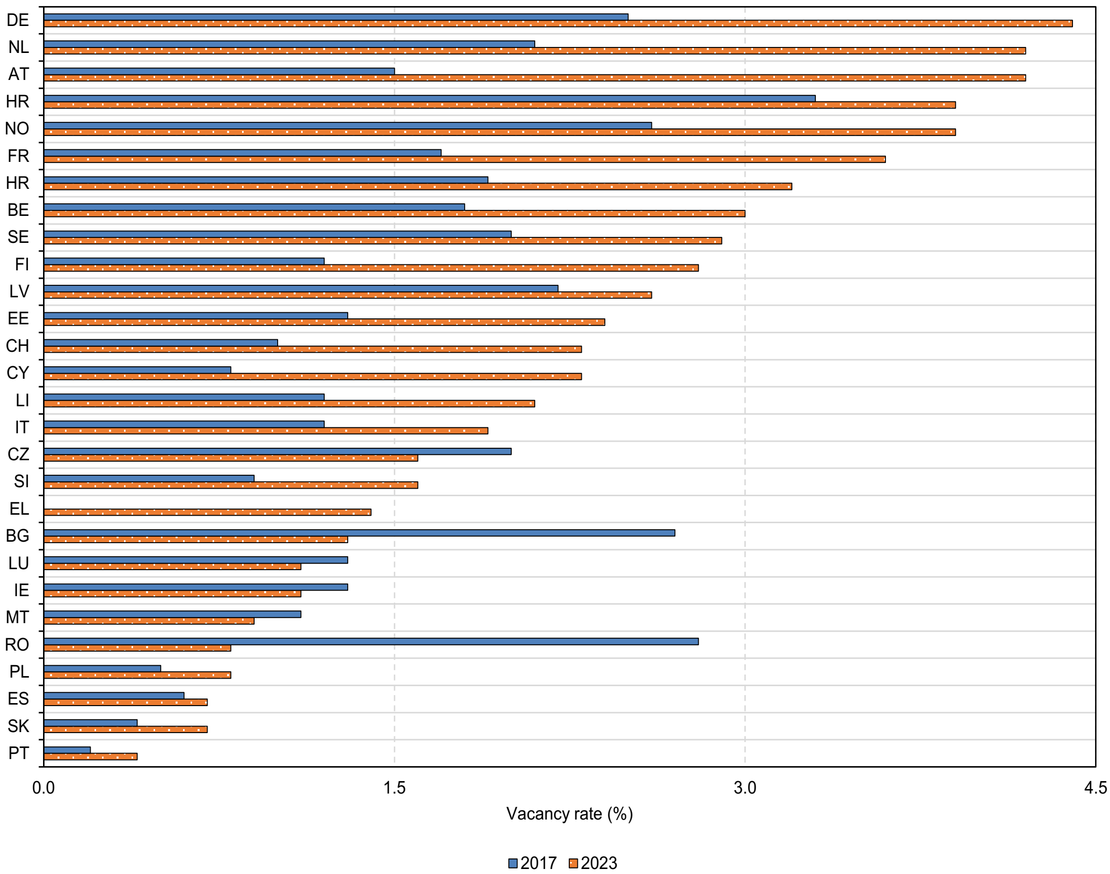
[189] Fuchs, M. & Fritzsche, B. (2022): The future employment needs in outpatient and inpatient care in Saxony-Anhalt: model calculations at district level up to the year 2035. (IAB-Regional. Reports and analyses from the regional research network. IAB Saxony-Anhalt-Thuringia 02/2022), Nuremberg, 43 p. DOI:10.48720/IAB.RESAT.2202.

[190] Hwang, H., & Roehn, O. (2022). Tackling the challenges of population ageing in the Slovak Republic.

[191] Vacancies refer to open job positions that employers are actively seeking to fill, while labour shortages occur when there is a mismatch between the supply of workers and the demand for those workers.

[192] Job vacancy rate by NACE Rev. 2 activity - annual data (jvs_a_rate_r2).

Figure 62: Vacancy rate in the human health and social work activities sector, 2017 and 2023



Source: Eurostat, Job vacancy rate by NACE Rev. 2 activity - annual data (jvs_a_rate_r2).

4.2.1. Medical needs of an ageing Europe

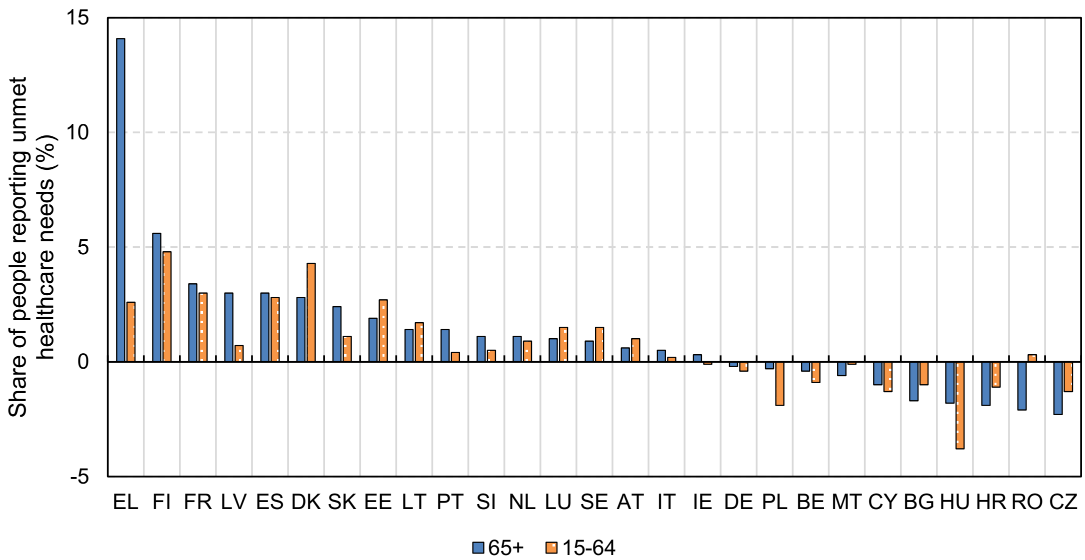
As noted in the introduction, EU Member States have some of the highest densities of doctors and nurses; however, unmet healthcare needs are reported in the majority of the EU. In 2023, 18 Member States reported an increase in unmet healthcare needs from 2017, based on individual-level data reflecting self-reported requirements for medical examination or treatment[193]. When broken down by age group, this trend persisted across both the 15–64 and 65+ age groups, with the increase over time being generally more pronounced among those aged 65 and older (Figure 63). In 2017 Estonia, Greece, Latvia, Poland and Denmark had the highest rates, over 7.5 %, of unmet needs among 15–64-year-olds, all of which, aside from Poland, experienced an increase in the following years. For the 65 years and older population, Greece, Romania, Estonia, and Latvia all had more than 10 % of the population reporting unmet needs. Apart from Romania, the percentage increased in the latter Member States from 2017 to 2023.

In addition to general healthcare needs, the ageing population of Member States also faces long-term care challenges. An EU report on the state of long-term care in Europe noted that in 2019 nearly half (46.5 %) of people 65 years old and older with severe difficulties with personal care or household activities reported having unmet needs in

[193] Self-reported unmet needs for medical examination (hlth_silc_08). Accessed on 23 July 2024.

these areas[194] This situation is an outcome of the combination of unaffordability and heterogeneous access to care support, and often leads to a dependence on informal care solutions[195].

Figure 63: Unmet healthcare needs, change from 2017 to 2023



Source: EU-SILC 2024, custom extraction by Milieu.

The need for healthcare workers given increasing demand for healthcare services, especially amongst older Europeans, is projected to increase in the coming years. As noted at the beginning of the chapter, the EU 27 is expected to witness a growth of 17 % in its 65 years and older population. However, some countries will see much larger increases. Ten EU and EFTA countries will experience an increase of 20 % or more in this population between now and 2035. Those with the largest projected increases include Luxembourg (39 %), Iceland (30 %), Ireland (30 %), Spain (27 %), Switzerland (26 %) and Austria (26 %)[196]. Hungary, Bulgaria, Latvia, Czechia, Romania, and Croatia are at the other end of the spectrum with projected increases of less than 7.5 %.

The old-age dependency ratio – defined as the number of people 65 years and older over the number of people aged 20 to 64 years old – gives an indication of how many working (age) persons there are to support a person who is most likely retired. In 2001 that ratio was 25.9 %, indicating that there were roughly four working age persons for each person over 65 years old. In 2020 that ratio was 34.8 %, indicating a decrease to three working age persons supporting each person over 65 years old[197]. Based on Eurostat projections, by 2040 the ratio will be 45 %, indicating that there are slightly more than two working age people in the economy for each person over 65 years old[198].

[194] Social Protection Committee (SPC) and the European Commission (DG EMPL) (2021), ‘2021 Long-Term Care Report: Trends’, challenges and opportunities in an ageing society.

[195] Ibid.

[196] Eurostat population projections, baseline scenario, change calculated from 2025 to 2035.(proj_23np)

[197] Eurostat. (2021). Old-age dependency ratio increases across EU regions. https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20210930-1

[198] Milieu calculations based on Eurostat baseline population projections (proj_23np).

Figure 64: Trends in dependency ratio from 2012 to 2040 for top 3 and bottom 3 ratios

TIME	2012	2020	2030	2040	2012/2040 PP Change	Trend
Italy	32.0	36.4	43.7	56.2	24.2	
Greece	30.0	35.1	41.8	55.0	25.0	
Portugal	29.1	35.6	44.1	54.6	25.5	
Luxembourg	20.3	20.9	24.8	30.6	10.3	
Malta	23.9	26.3	29.2	28.5	4.6	
Iceland	18.9	21.6	26.8	28.1	9.2	

Source: Eurostat Old-age-dependency ratio (tps00198), custom extraction by Milieu. For 2030 and 2040, calculations based on Eurostat baseline population projections (proj_23np).

4.2.2. Europe's healthcare professionals

In the State of Health in the EU Report 2023, the European Commission found every Member State to be in need of additional healthcare workers[199]. However, this problem is not recent, though it was exacerbated by the COVID-19 pandemic[200].

One remedy to address these shortages is to train more students to become doctors and nurses. According to Eurostat data[201], in three Member States, Czechia, Estonia, and Malta, plus Switzerland and Norway, fewer medical doctors graduated in 2021 than in 2017, four Member States – Germany, Estonia, Latvia, and Portugal – saw growth of less than 5 % and another two reported growth of less than 10 % in the number of medical doctors graduated. Growth of greater than 10 % during this time period was recorded in 11 Member States[202]. With regard to nurse graduates, nine Member States plus Norway recorded fewer nurses graduating in 2021 than 2017, two Member States, saw growth of less than 10 % in the number of graduates, and 11 Member States saw growth of more than 10 % in the number of nurse graduates[203].

A high number of healthcare graduates does not per se imply the absence of shortages of medical doctors, nurses, or other health professionals in the workforce. Instances of healthcare worker shortages in countries with high medical graduation rates were documented in Ireland[204] and in Slovakia, Hungary, Croatia and Romania, which have above the EU-average densities of medical doctor and nurse graduates, but with densities of available healthcare workers below the EU average[205].

Figure 65 compares the number of retiring medical doctors with the number of expected graduates. The number of graduates over the next decade was projected using an

[199] European Commission (2023c), 'State of Health in the EU: Synthesis Report 2023'. Luxembourg: Publications Office of the European Union, 2023. https://health.ec.europa.eu/system/files/2023-12/state_2023_synthesis-report_en.pdf

[200] Buchan J., Catton H., & Shaffer F.A. (2022), Sustain and retain in 2022 and beyond, The Global Nursing Workforce and the COVID-19 pandemic, *International Council of Nurses*, 2022.

[201] Eurostat health graduates (hlth_rs_grad2).

[202] Data unavailable for these calculations in eight Member States: Cyprus, Denmark, Greece, Finland, France, Lithuania, Luxembourg, and Slovenia.

[203] Data unavailable for these calculations in four Member States: Denmark, Greece, Lithuania, and Slovenia.

[204] Heffron, M., & Socha-Dietrich, K. (2019). The Irish paradox: Doctor shortages despite high numbers of domestic and foreign medical graduates. Recent Trends in International Migration of Doctors, Nurses and Medical Students, 67.

Brugha, R., Clarke, N., Hendrick, L., & Sweeney, J. (2021). Doctor retention: a cross-sectional study of how Ireland has been losing the battle. International journal of health policy and management, 10(6), 299.

[205] Mara, I. (2020). Health professionals wanted: chain mobility across European countries (No. 445). WIIW Research Report.

autoregressive integrated moving average based on historical numbers of medical doctor graduates[206]. This was compared the total number of currently practicing medical doctors, aged 55 years and older, who are assumed to retire over the coming decade[207]. In this model, Germany, France, Italy, Greece, and to a lesser extent Austria, Switzerland, Estonia, Iceland, and Norway, will all experience a deficit of medical doctors in the near future. EU-mover medical doctors can ease the strain, especially those trained in countries such as Poland and Romania, that are modelled to have an excess of 74 000 medical doctors.

Figure 66 shows that in Hungary in the period 2025-2035 twice as many doctors and nurses are projected to graduate as can be expected to retire, in Romania it's seven times, and Croatia ten times as many. In terms of doctors, Cyprus, Ireland, and Malta are 'producing' more than twice the number required to replace retirees, and Romania three times as many.

This "excess", however, is true when only considering retirement replacement. Doing so assumes that the current state of doctors or nurses per 10 000 inhabitants is of a sufficient level and that retirement is the main reason to leave the profession. That is not always the case. While there are EU Member States with very high ratios of doctors and nurses per 10 000 inhabitants (see Table 15), there are other Member States with much lower ratios and for some countries these ratios fluctuate from one year to another strongly. For Sweden in 2022 71 doctors per 10 000 inhabitants were registered, while it was 43 in 2021. Other Member States, such as Romania (34), Estonia (34), Poland (34), Latvia (34), France (33), Slovenia (33), Hungary (33) and Luxembourg (30) have a much lower ratio[208]. In terms of nurses: while the EU-average is at 82.6 nursing staff [per 10 000 inhabitants], nine Member States have fewer than 75 nurses per 10 000 inhabitants, while eight Member States have more than 125 nurses per 10 000 inhabitants. The countries with the lowest densities are Estonia (69), Spain (66), Poland (63), Slovakia (60), Hungary (55), Bulgaria (46), Cyprus (46), Latvia (44), and Greece (41)[209].

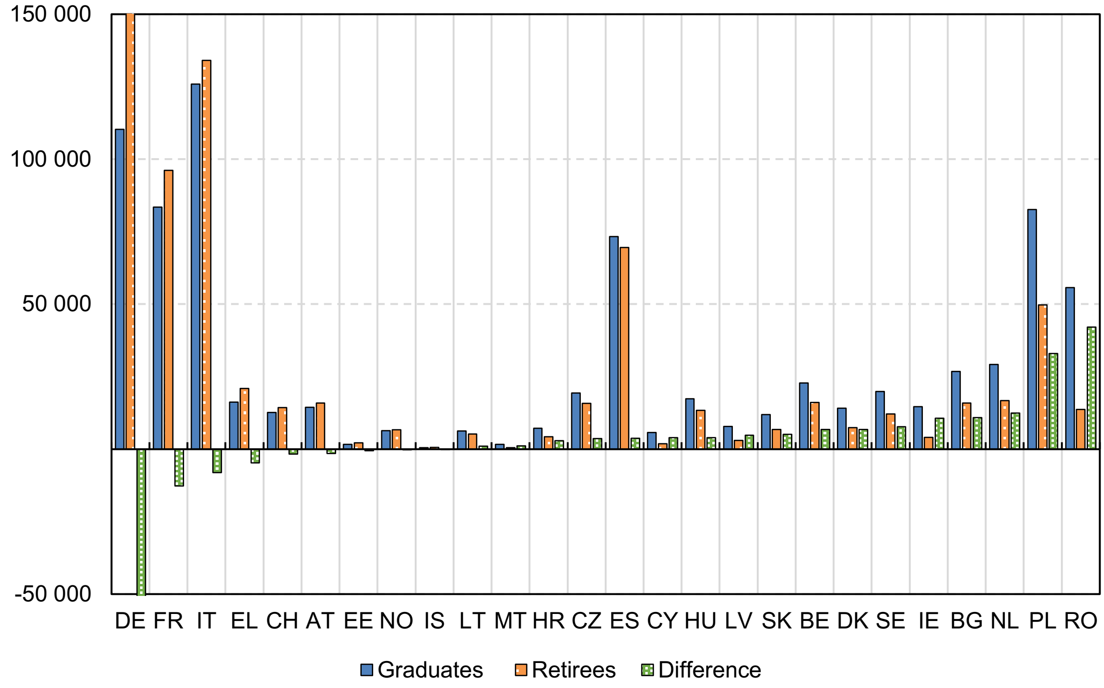
[206] The ARIMA model is a simple and effective model for analysing time series data and forecasting forward. It has three parts to it. The auto-regression (AR) which is a regression estimation of a variable based its previous data points; the integration (I) which considers an overall trend in the data; and (MA) the moving average which accounts for noise based on previous data points.

[207] A retirement age of 65 was assumed across all Member States.

[208] Data downloaded from the World Health Organization on 20 July September 2024 https://www.who.int/data/gho/data/indicators/indicator-details/GHO/medical-doctors-(per-10-000-population) https://data.who.int/indicators/i/CCCEBB2/217795A

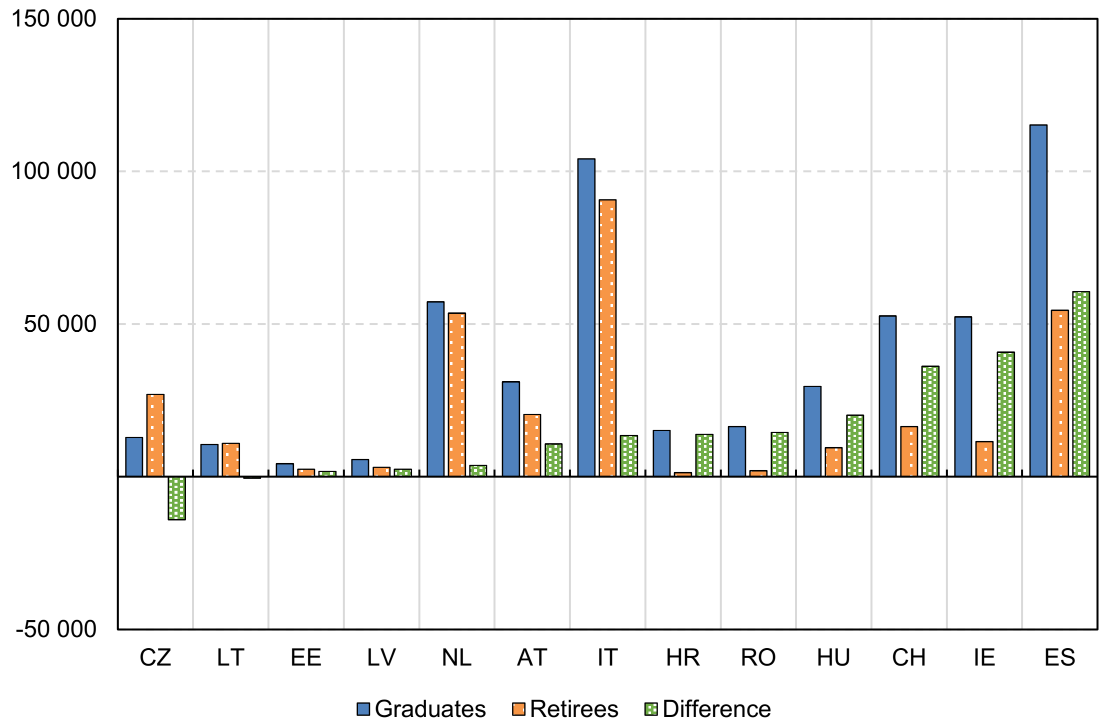
[209] There are 10 EU countries in the top 20, plus 3 EFTA countries. Data downloaded on 20 July September 2024 https://www.who.int/data/gho/data/indicators/indicator-details/GHO/nursing-and-midwifery-personnel-(per-10-000-population) https://data.who.int/indicators/i/B54EB15/5C8435F

Figure 65: Projected medical doctors graduates versus projected medical doctors retirees, 2025-2035



Source: Eurostat health personnel (hlth_rs_prs2) and hlth_rs_grad2, custom extraction by Milieu.

Figure 66: Projected nurse graduates versus projected nurse retirees, 2025-2035



Source: Eurostat health personnel (hlth_rs_prs2) and hlth_rs_grad2, custom extraction by Milieu.

4.2.3. EU movers in healthcare

As the EU Member States' needs for healthcare workers, whether doctors, nurses, or personal care workers, will continue to increase, countries look beyond their own borders for solutions. To illustrate the flow of EU healthcare workers within the EU, the OECD's Health Workforce Migration data[210],[211] was used in Table 17. This dataset reflects the country where a doctor or nurse was trained and where they practice, it does not consider nationality[212].

At first glance, the large movement of doctors from Germany, Romania, Italy, and Poland are apparent. These four countries provided nearly half (47 %) of the 40 179 EU mover doctors accounted for in this dataset from 2017 to 2022. On the other side, Switzerland is destination for one-fourth of the EU mobile doctors. Germany is a distant second. Overall, Switzerland and Norway are the largest net destination countries, while Italy and Poland are the largest net countries of origin. Of the top ten sending countries, only four, Germany, France, Belgium, and Austria, are also in the top ten receiving countries.

There are also linguistic and geographical links between countries of destination and origin. Large movements between the German-speaking countries, Germany and Switzerland, and to a lesser extent Austria, and the French-speaking countries, France, Switzerland and Belgium, are observed. While neighbouring countries also see larger flows between themselves.

Table 17: Top destination and origin countries for EU mover doctors and nurses, 2017-2022

	Doctors				**Nurses**			
Rank	**Working in…**		**Trained in …**		**Working in …**		**Trained in…**	
	Country	*Total*	*Country*	*Total*	*Country*	*Total*	*Country*	*Total*
1	Switzerland	10 210	Germany	6 425	Germany	9 816	Romania	7 198
2	Germany	6 471	Romania	5 134	Switzerland	7 583	Italy	3 823
3	Norway	4 847	Italy	4 417	Norway	6 175	Germany	3 532
4	France	2 927	Poland	2 943	Belgium	2 758	Denmark	2 401
5	Belgium	2 187	France	1 969	Italy	2 287	France	2 381
6	Greece	2 001	Slovakia	1 878	Ireland	2 186	Spain	2 111
7	Ireland	1 928	Hungary	1 871	Spain	1 833	Belgium	2 016
8	Sweden	1 839	Bulgaria	1 791	France	1 292	Poland	1 775
9	Spain	1 798	Belgium	1 598	the Netherlands	881	Portugal	1 664
10	Austria	1 368	Austria	1 507	Sweden	495	Sweden	1 450

[210] Data are collected from different sources depending on the Member State. For example, in Austria the data are collected from the Austrian Medical Association, in Latvia data are collected from the Health Inspectorate of Latvia, and in Sweden data come from the National Board of Health and Welfare. Full list of sources by country is available at: https://stats.oecd.org/wbos/fileview2.aspx?IDFile=0b10c60d-8a48-4b5f-900a-8f0f6c05f115.

[211] Foreign-trained doctors are described as those "doctors who have obtained their first medical qualification (degree) in another country and are entitled to practice in the receiving country." This includes foreign-trained doctors with any type of registration to practice, as well as medical interns and residents with a medical degree from another country. It excludes foreign-trained doctors who are registered to practice in the receiving country, but are practicing, either temporarily or permanently, in another country.

[212] The dataset considers where the doctor was trained and where the doctor practices. This means that a Slovak citizen that received their medical training in Germany and then returned to Slovakia is captured in the flow of doctors from Germany to Slovakia.

Rank	Doctors				Nurses			
	Working in…		Trained in …		Working in …		Trained in…	
	Country	*Total*	*Country*	*Total*	*Country*	*Total*	*Country*	*Total*
11	Others	4 603	Others	10 646	Others	478	Others	7 433

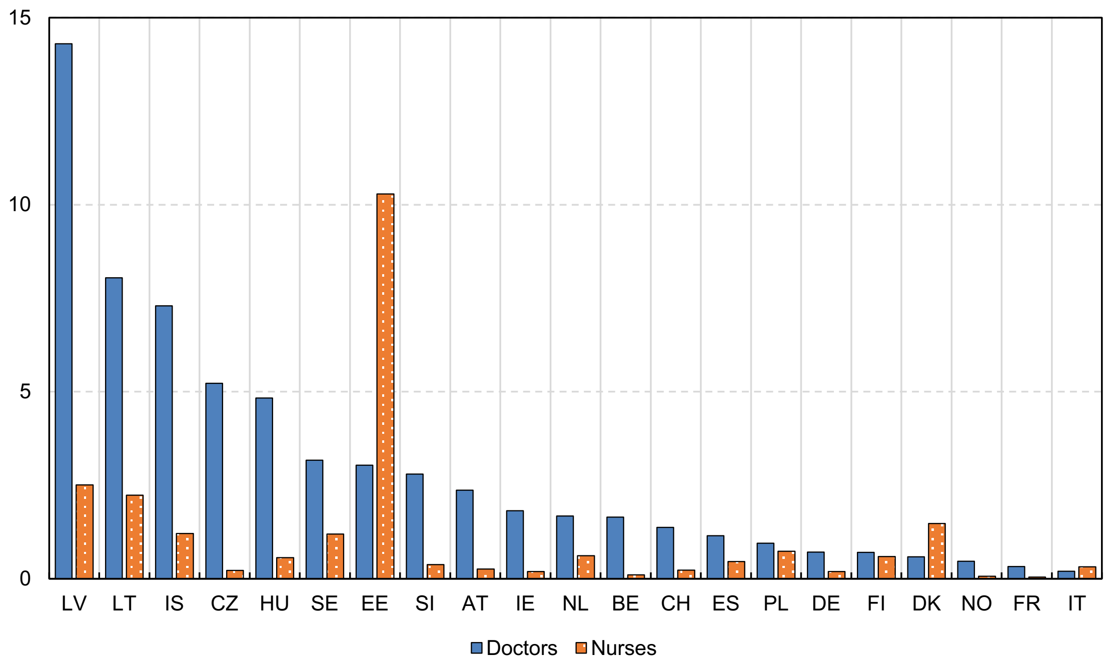
Note: Only the 10 largest sending and receiving countries were included.

Source: OECD's Health Workforce Migration data, own elaboration.

For nurses, the distribution is further condensed with Germany, Switzerland, and Norway receiving together two-thirds (66 %) of all EU mobile nurses, see Table 17. Including the next four largest receiving countries, Belgium, Italy, Ireland, and Spain, accounts for 90 % of the 35 784 EU mover nurses from 2017 to 2022. The largest net countries of origin of nurses are Romania (7 198), Denmark (2 401), Poland (1 741), Portugal (1 664), and Italy (1 536).

To give context to these values, Figure 67 compares the number of the doctors trained in one Member State and practicing in a second Member State, to the number of the doctors practicing in the first Member State[213]. The number of doctors trained in Latvia and currently practicing in another EU or EFTA country is equal to nearly 15 % of the population of doctors currently practicing in Latvia. In the case of nurses, a population equivalent to 10 % of the nurse population practicing in Estonia is residing and working in other EU Member States or EFTA countries.

Figure 67: Percentage of doctors and nurses trained in one country and practicing in another compared to doctors and nurses in that country, 2021



Note: Data on the number of doctors and nurses practicing in the home country is missing for Bulgaria, Croatia, Cyprus, Greece, Luxembourg, Malta, Portugal, Romania and Slovakia.

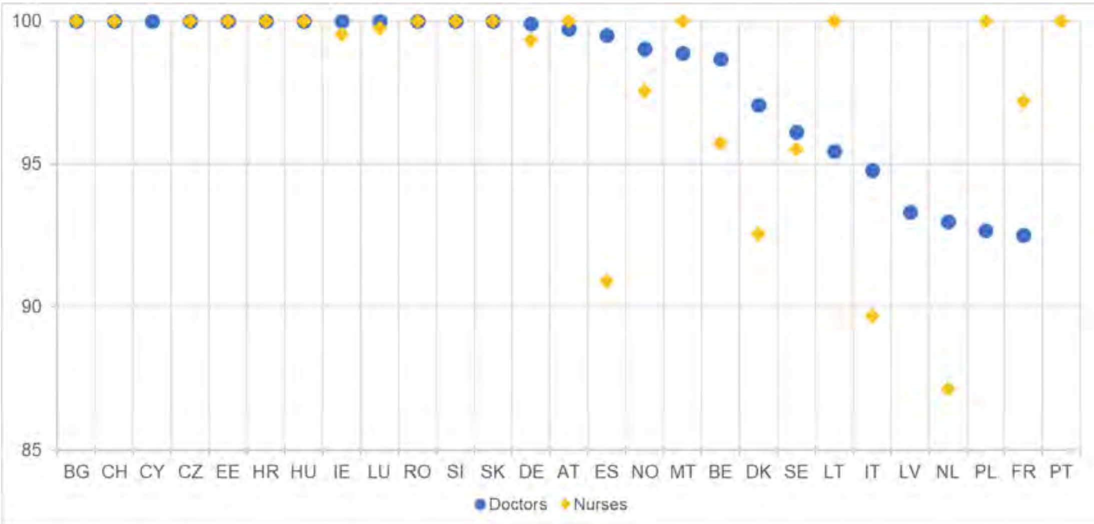
Source: OECD data on health workforce migration and health resources, custom extraction by Milieu.

[213] This is an imperfect measurement since it could capture doctors who trained in a different Member State than returned home, though that is expected to be a small portion.

Box 6: Recognition of qualifications of mobile healthcare professions

A key factor to the mobility of EU workers in the healthcare sector is the recognition between countries. The figure below shows the rate of positive decisions by the receiving Member State. France, Poland, and the Netherlands have the lowest rates of positive decisions for doctors, 92.5 %, 92.7 %, and 93 % respectively. The Netherlands also has lowest rate of positive decisions where nurses are concerned (87 %), followed by Italy with a rate of 89 %.

Figure 68: Share of positive decisions regarding qualifications by country where recognition is sought, for nurses and doctors, 2017-2023



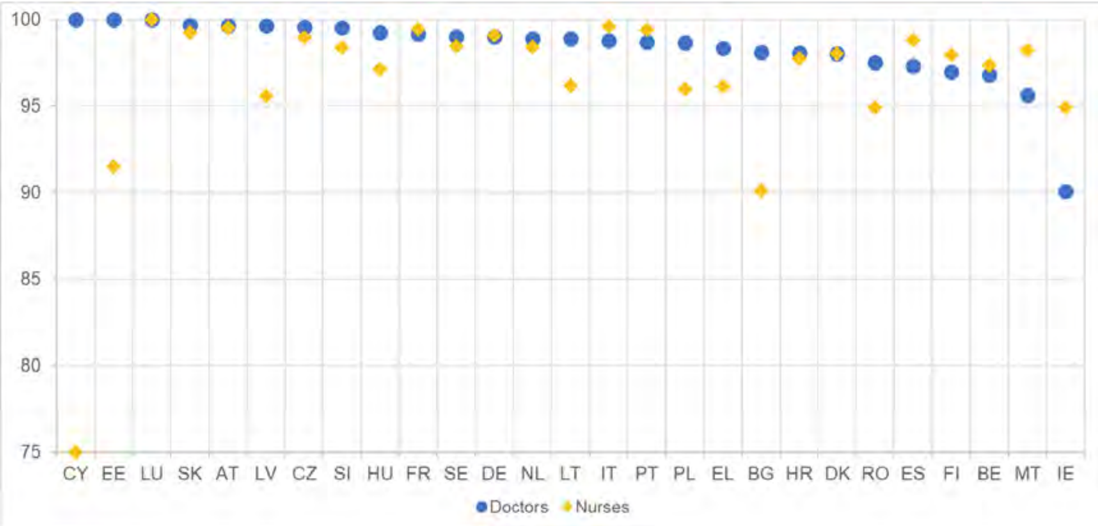
Note: No data available for doctors in Portugal. No data available for nurses in Latvia and Cyprus.

Source: DG GROW Regulated Professions Database 2024, custom extraction.

Looking from the other side, the Member States for which medical doctors' qualifications are most accepted include Luxembourg, Cyprus, and Estonia, all with positive decision rates of 100 % (Figure 69). On the other end of the spectrum, Ireland and Malta have positive decision rates of 90 % and 95 % for the doctors they train. For nurses, Czechia, Germany, France, Italy, Luxembourg, Austria, Portugal and

Slovakia all have positive decision rates higher than 99 %. Cyprus and Bulgaria have the lowest rates, at 75 % and 90 % respectively.

Figure 69: Share of positive decisions regarding qualifications by country of training, for nurses and doctors, 2017-2023



Source: DG GROW Regulated Professions Database 2024, custom extraction.

4.2.3.1. Stock of EU movers in healthcare professions

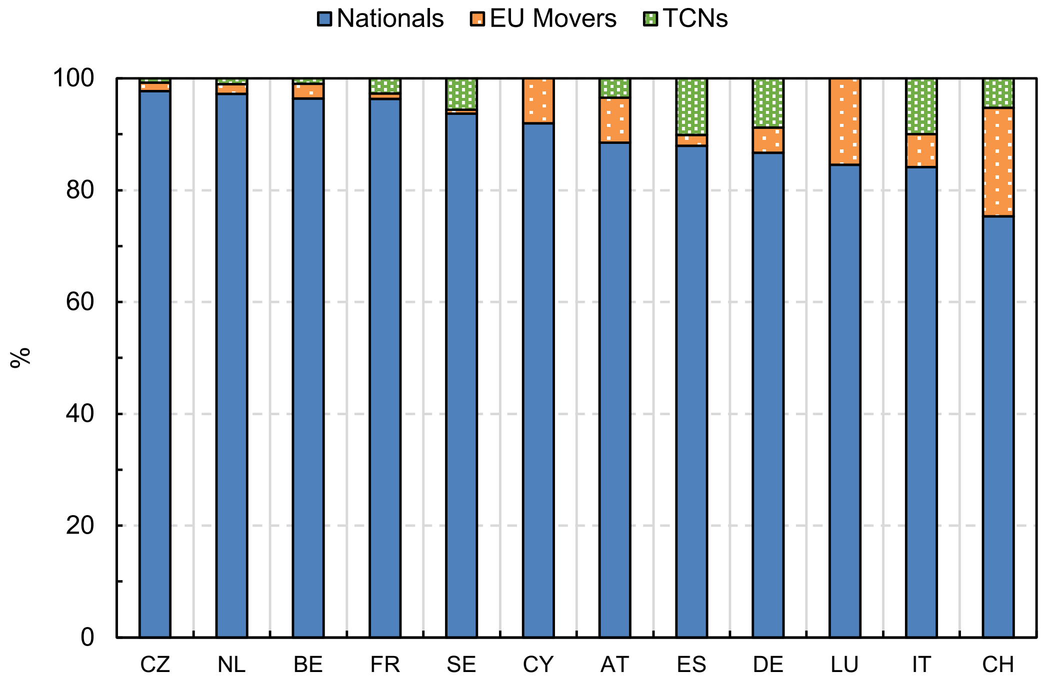
The EU-LFS data allow for an estimation of the total number of EU movers in the 12 countries[214]. In absolute numbers, the main countries of residence of EU movers in the healthcare sector in 2023 are Germany and Italy, (see Figure 60 and Figure 61). Germany is country of residence to 141 410 movers or 31 % of all movers in the sector, while Italy is country of residence to 91 617 movers (20 %). Switzerland is in third place with 60 244 EU movers (13 %). Germany and Switzerland are also the countries of residence for similar percentages of all EU movers, 34 % and 11 % respectively (see Section 1.3.2.1). Italy, however, is the country of residence for only 10 % of all EU movers.

Examining the distribution of EU movers by professional category reveals that Switzerland is home to 24 % of all EU mobile medical doctors and to 50 % of the EU-mobile nurses/midwives. Three-quarters (74 %) of all EU-mobile nurse/midwife associates and over half (57 %) of all EU-mobile ‘other health associates’ reside in Germany. Meanwhile, Italy is home to the biggest group of EU mobile personal care workers (38 %).

Figure 70 illustrates the importance of EU movers in the healthcare sector in countries with available figures. Their share varies from one-fifth (19 %) of all healthcare workers in Switzerland to just 1 % in Sweden. Figure 70 also highlights the portion of EU movers as compared to TCNs.

[214] Data are available for Austria, Belgium, Switzerland, Cyprus, Czechia, Germany, Spain, France, Italy, Luxembourg, the Netherlands, and Sweden.

Figure 70: Percentage breakdown of healthcare sector workers by country, 2023



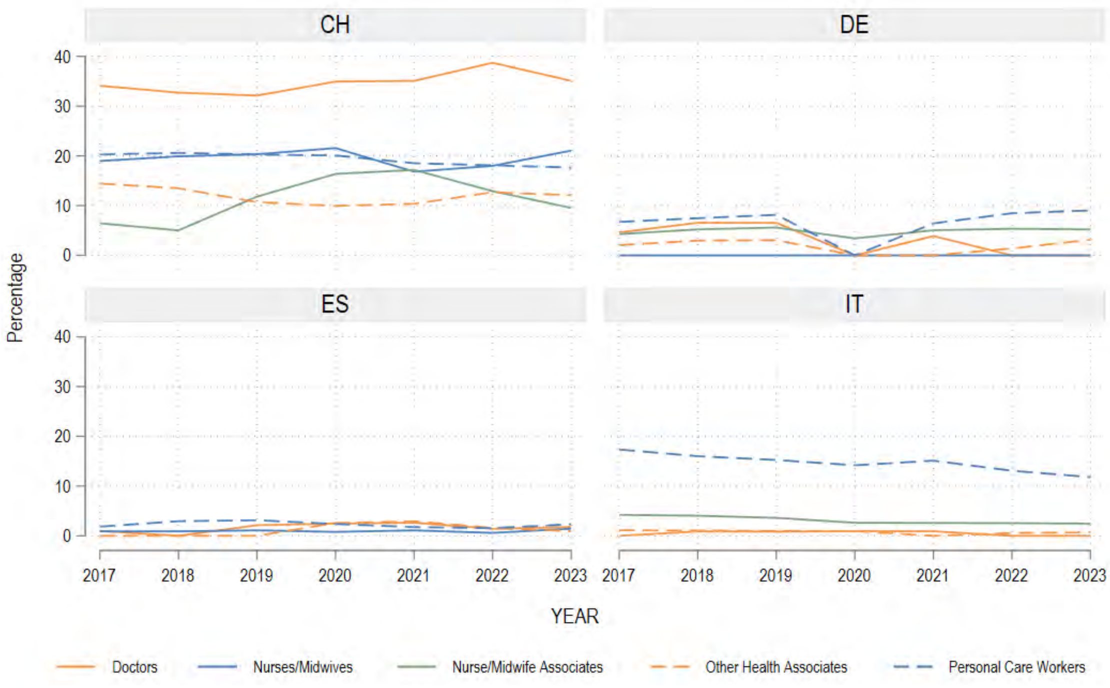
Source: EU-LFS 2024, custom extraction by Milieu.

Looking at the level of professional categories, large differences appear: in Luxembourg and Switzerland, EU movers account for 47 % and 35 % of all doctors. In Switzerland around 21 % of the nurses and midwifes are EU movers, Austria following as a distant second with 6 %. Luxembourg and Switzerland, again, lead the EU with the largest portion of EU-mobile nurse and midwife associates, 27 % and 10 % respectively. EU movers comprise the largest portion of other health associates in Switzerland (12 %) and the Netherlands (4 %). Finally, in terms of personal care workers, EU movers account for notable portions of workers in Switzerland (18 %), Austria (12 %), Italy (12 %), and Germany (9 %).

4.2.3.2. EU Movers over time

When disaggregated by professional category, the situation over time differs between countries (Figure 71). In Spain and Italy the professional category with the largest share of EU movers is personal care workers. In Switzerland, the share of EU-mobile workers is particularly high in the group of nurses/midwives. The largest share of EU movers in Germany is amongst nurse/midwife associates.

Figure 71: EU Movers as a percentage of healthcare professionals by professional category, 2017-2023



Source: EU-LFS 2024, custom extraction by Milieu.

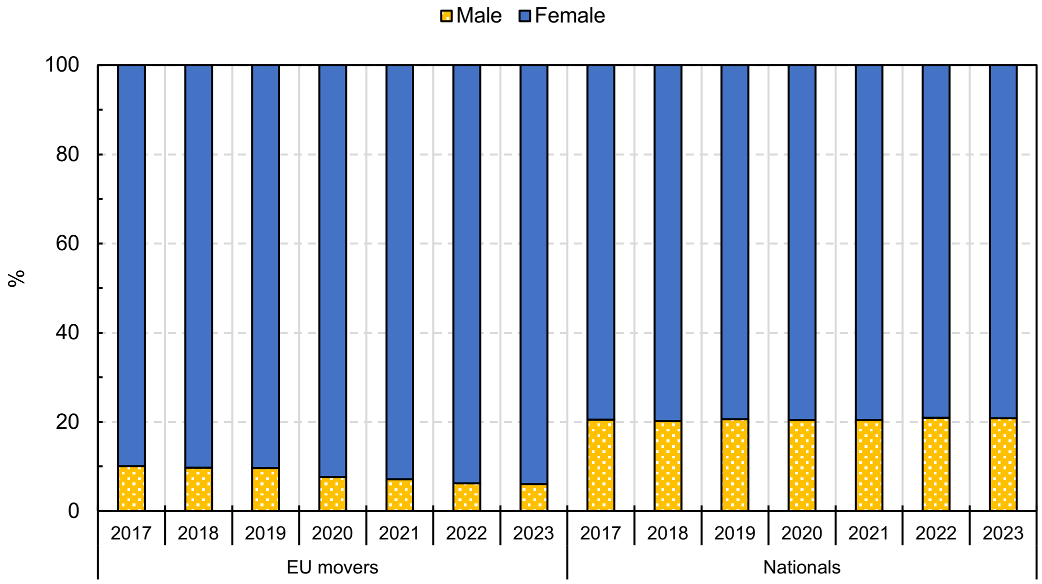
4.3. Profile of EU Movers in the healthcare sector

This section examines the demographics, skillsets, and working conditions of EU mobile healthcare workers. It looks at their gender composition, age distribution, educational attainment, and contractual and working time arrangements, and compares these attributes with those of national health workers. The research team also conducted a thorough assessment of data reliability and plausibility. Thereby it was concluded that a representation of the data at the ISCO or country level is in most cases unreliable due to data limitations (see Box 5). As a result, this analysis emphasises broader trends concerning demographics, skillset and working conditions in the countries with available and sufficiently robust data rather than detailed variations at the occupational or country level. The only exception is education, where the data coverage in different educational categories allows comparisons between nationals and EU movers at the ISCO level.

4.3.1. Gender

Figure 72 illustrates the gender distribution between nationals and EU movers in the healthcare sector over the 2017-2023 period. Among nationals, women consistently constituted around 79-80 % of the workers. Among EU movers, women accounted for approximately 90 % to 94 % from 2017 to 2023. The highest proportions of male EU movers were observed in 2017 and 2018, both at 10 % (34 000 and 32 000 individuals, respectively), but this has been gradually decreasing since. In 2020, the proportion of male EU movers dropped to 8 % (19 000 individuals), and by 2022 and 2023, it further declined to 6 % (with 18 000 and 20 000 individuals, respectively). Overall, the data show that female health workers are more likely to relocate than their male counterparts, and this trend has become more pronounced over time.

Figure 72: Gender distribution of EU movers vs. national health workers[215], 2017 - 2023



Note: The included professional categories are Medical Doctors (221), Nursing and Midwifery Professionals (222), Nursing and Midwifery Associate Professionals (322), and Personal Care Workers in Health Services (532).

Source: EU-LFS 2024, custom extraction by Milieu.

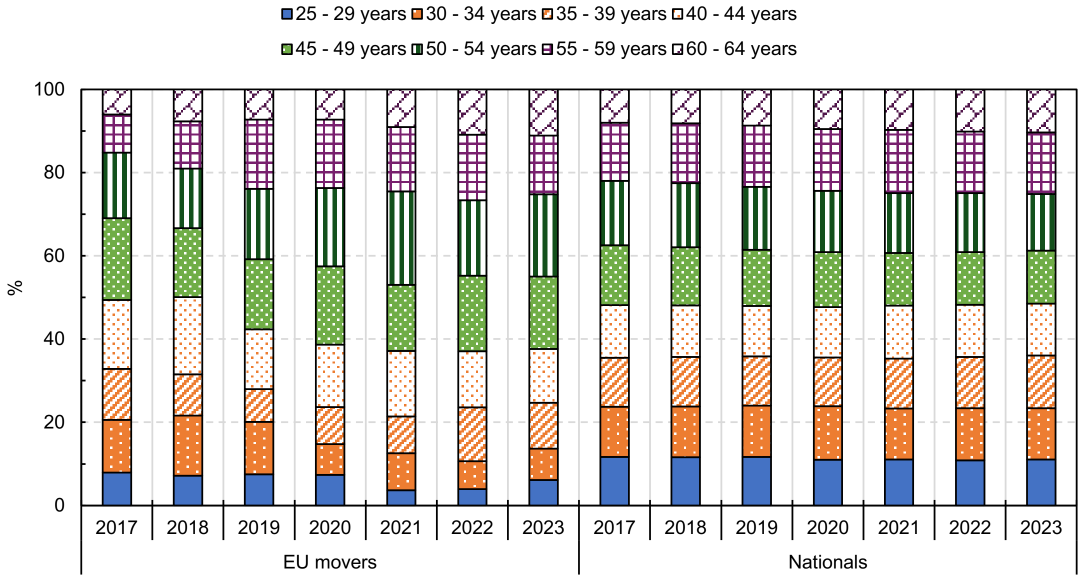
4.3.2. Age

Figure 55 shows the age distribution of EU mobile and national health workers (2017 to 2023). While nationals maintain a stable distribution across age categories over time, EU movers become increasingly older, with the proportion of EU health workers aged over 45 years gradually increasing from 51 % in 2017 to 62 % in 2023[216].

[215] The absolute numbers of EU mover health workers in all available EU and EFTA countries by gender in 2018 and 2023 are shown in Table 47 in Annex B.3.

[216] This conclusion is drawn from a limited sample of countries with available data, as most countries only provided data for specific ISCO or age categories. Consequently, the findings of this analysis should be interpreted with caution. Nonetheless, in countries where data are available, there is a trend indicating that healthcare workers among EU movers tend to be older and part of an ageing workforce, in contrast to movers in other professions.

Figure 73: Age distribution of nationals in comparison to EU movers, 2017-2023[217]



Note: 20-24 age category excluded from the analysis[218]. The included professional categories are Medical Doctors (221), Nursing and Midwifery Professionals (222), Nursing and Midwifery Associate Professionals (322), and Personal Care Workers in Health Services (532).

Source: EU-LFS 2024, custom extraction by Milieu.

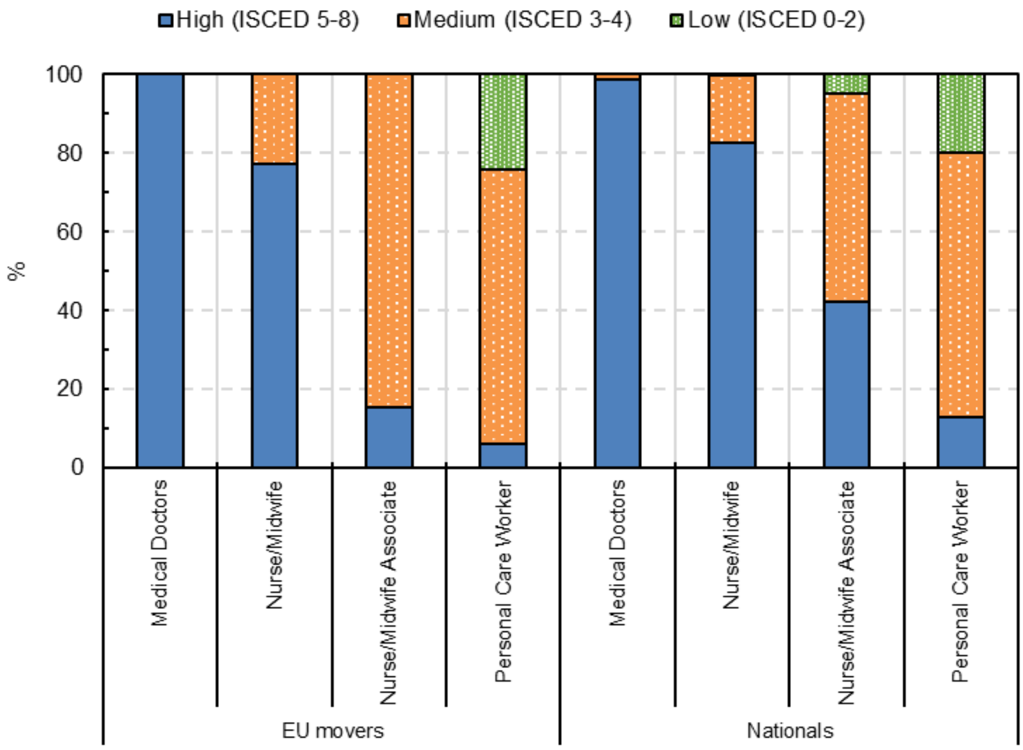
4.3.3. Education

In 2023, 43 % of nationals in healthcare had an ISCED 5-8 level of education, compared to 32 % of EU movers. However, when broken down into specific ISCO 3-digit categories, EU movers appear to have education levels that are comparable to those of national health workers (see Figure 74). The differences in educational levels between nationals and EU movers appear to be negligible for medical doctors, nurses/midwifes and personal care workers. There are some noticeable differences in the remaining ISCO category – Nurse/Midwife associates. In 2023, only 15 % of EU movers in this category had a high level of education (ISCED 5-8), compared to 42 % of nationals.

[217] The absolute numbers of EU mover health workers in all available EU and EFTA countries by age-group in 2018 and 2023 are shown in Table 488 in Annex B.3.

[218] The data for EU movers in the 20-24 age category lack sufficient robustness and, in most cases, are not reported by Member States. The absence of reported data does not imply that there are no EU mover health workers aged 20-24 in these countries; rather, it reflects that their numbers fall below the EU-LFS reliability thresholds and, as a result, are not reported. This may be influenced by the lengthy duration of studies for medical professionals, which can delay their ability to relocate to other EU Member States.

Figure 74: Educational attainment per professional category, EU movers vs nationals, 2023[219]



Source: EU-LFS 2024, custom extraction by Milieu.

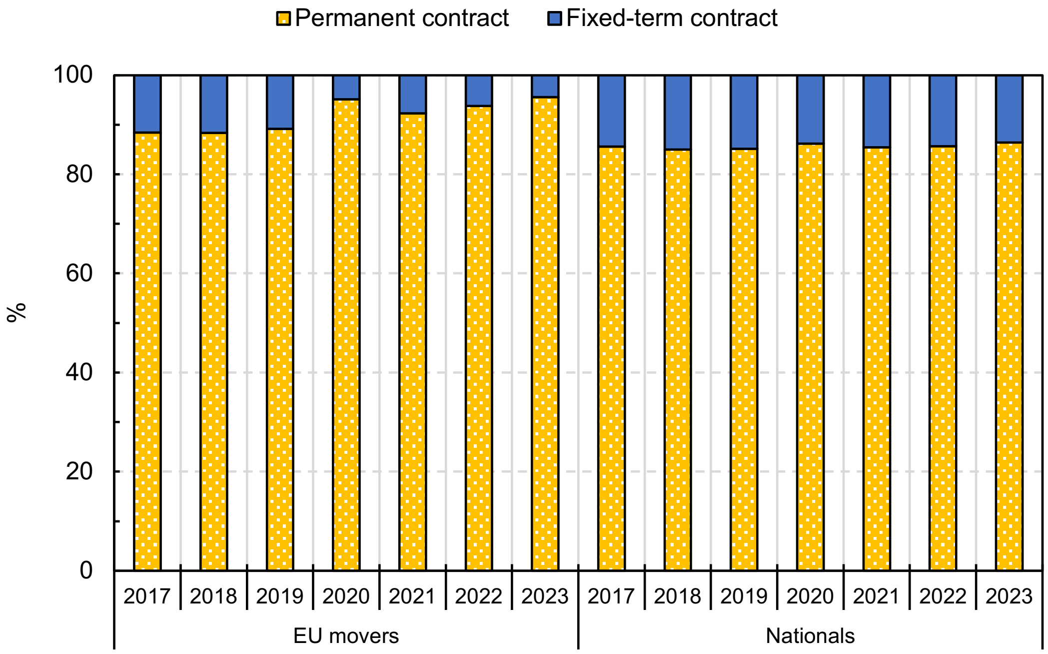
The overall educational distribution is influenced by the high share of EU movers working in personal care, which is the ISCO category with lowest educational attainment.

4.3.4. Contractual arrangements

Turning to contract type, EU movers have a consistently higher proportion of permanent contracts compared to nationals, especially post 2019 (Figure 75). In 2023, 96 % of EU movers were on permanent contracts, compared to 86 % of nationals. While EU movers experienced an increase in permanent contracts during the 2017-2023 period, the proportion of permanent contracts for nationals remained stable throughout the years.

[219] The absolute numbers of national and EU mover health workers in all available EU and EFTA countries by educational attainment in 2018 and 2023 are shown in Table 50 in Annex B.3.

Figure 75: Comparison of contract types – nationals vs. EU movers, 2017-2023[220]



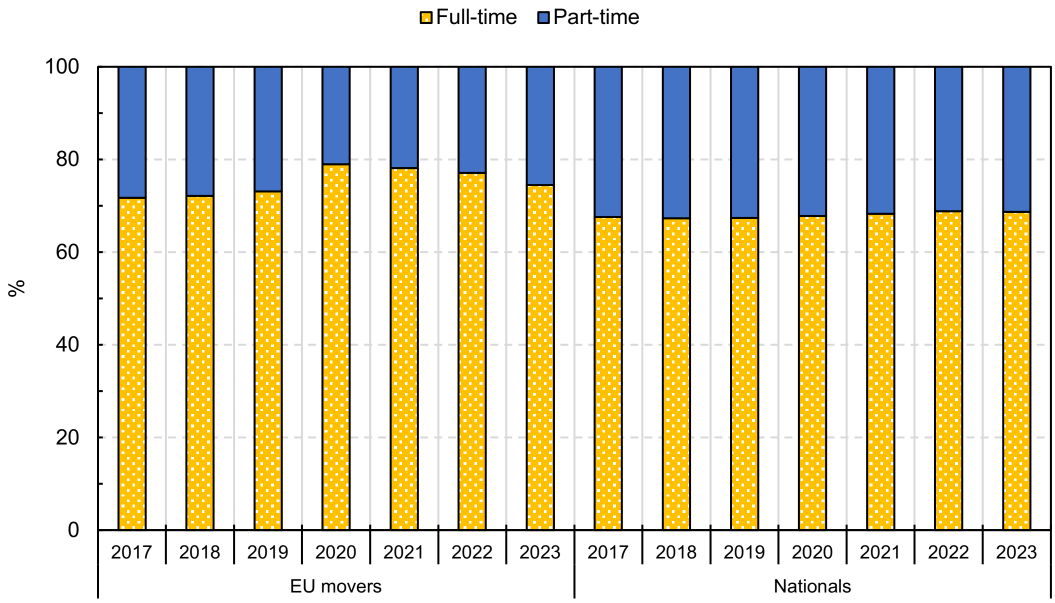
The included professional categories are Medical Doctors (221), Nursing and Midwifery Professionals (222), Nursing and Midwifery Associate Professionals (322), and Personal Care Workers in Health Services (532).

Source: EU-LFS 2024, custom extraction by Milieu.

In 2023, 74 % of the EU movers in the health workforce were employed full-time (Figure 76). The prevalence of full-time employment has been consistent over time, with only slight fluctuations. It peaked in 2020 and 2021 with 79 % and 78 % respectively, likely due to the increased demand for healthcare services during the COVID-19 pandemic. With consistently around 68 % full-time employment, nationals exhibited over the period 2017/2023 a lower proportion of full-time workers than EU movers.

[220] The absolute numbers of national and EU mover health workers in all available EU and EFTA countries by contract type in 2018 and 2023 are shown in Table 51 in Annex B.3.

Figure 76: Comparison of full-time vs. part-time contracts – nationals vs. EU movers, 2017-2023



The included professional categories are Medical Doctors (221), Nursing and Midwifery Professionals (222), Nursing and Midwifery Associate Professionals (322), and Personal Care Workers in Health Services (532).
Source: EU-LFS 2024, custom extraction by Milieu.

4.4. Return mobility

While so far this chapter has looked at 'outward' mobility, i.e. mobility from the country of nationality or where the training took place to another country, in Europe also return mobility, meaning the return to the country of nationality after some years is frequent and plays an important role. Linked to the EU-LFS data available, this analysis defines returnees as persons with the nationality of the country in which they reside, and having resided in this country for less than ten years after living outside that country for at least one year.

In 2023, returnees in the healthcare profession were most numerous in Germany (297 451) and Spain (132 316). Conversely, the absolute number of returnees was less than 50 000 in Switzerland (47 419), the Netherlands (22 202), and Austria (14 778).

4.4.1. Trends in return mobility

From 2017 to 2023, every country with available figures[221] recorded an increase in the proportion of national healthcare workers who are returnees. Italy is the exception, its proportion hovering around 0.5 %. In Spain, this proportion grew from 2 % in 2015 to 3 % in 2023. In this same period, Sweden experienced a doubling in the proportion of

[221] Countries with sufficient data on this topic are Austria, Belgium, Switzerland, Czechia, Germany, Denmark, Greece, Spain, Finland, France, Ireland, Italy, the Netherlands, Norway, Portugal, and Sweden. Again, the coverage is not complete for all professional health sector categories, nor all of the years.

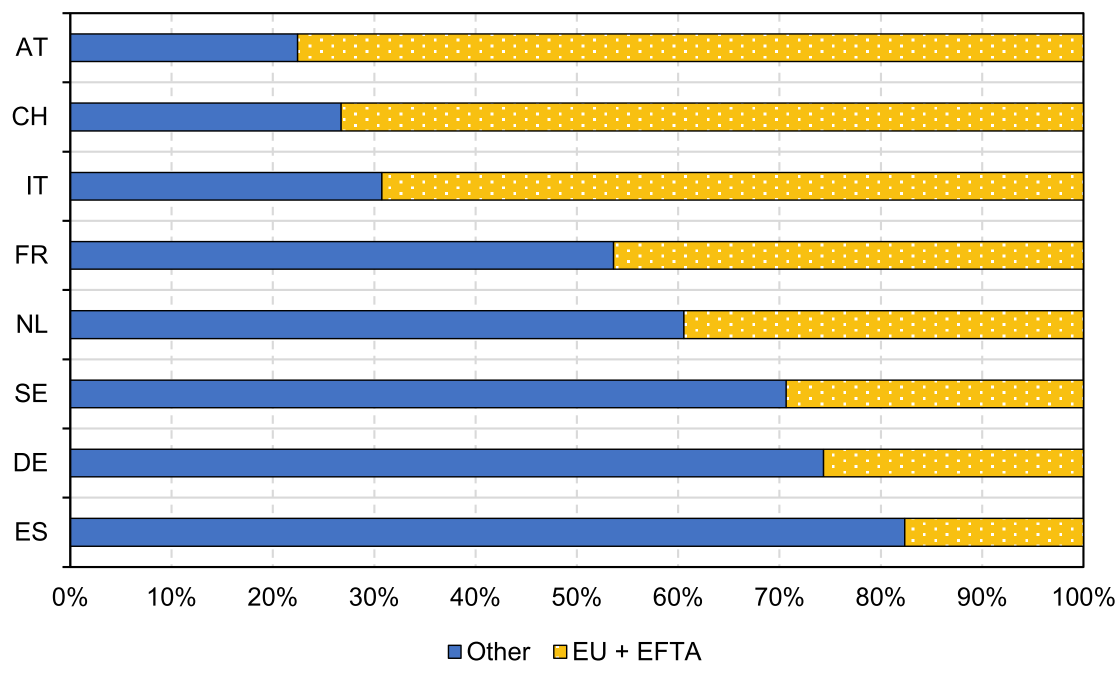
Swedish citizens working in the area and residing in Sweden less than ten years, up to 8 % from 4 %[222].

When broken down by professional category of healthcare worker, the picture changes with different Member States having larger or smaller portions of returnees depending on the category. In Austria returnees are 1.5 % of all national doctors. In Spain, returnees comprise 1 % of national nurses/midwives, the highest portion in the sample. For nurse/midwife associates, returnees comprise 0.6 % of this professional category in Germany. Sweden records 6 % of its personal healthcare workers as returnees.

From where these returnees came differed by professional category. In 2023, 54 % of the stock of nurse/midwife returnees had returned from EU or EFTA countries), the remaining portion having returned from non-EU/EFTA countries, i.e. third countries. For doctors 45 % had returned from EU or EFTA countries while for personal care workers less than a third had returned from EU/EFTA countries (31 %).

It also differed at country level. Some countries saw the vast majority of their returnees coming from EU and EFTA countries, including Austria (77 %), and Switzerland (71 %). At the other end of the spectrum, returnees from third countries made up the majority of returnees in, Spain, Germany, and Sweden, which received less than one-third of all returnees from EU and EFTA countries, see Figure 77.

Figure 77: Origin of returnees in healthcare professions, 2023



Source: EU-LFS 2024, custom extraction by Milieu.

When drilling down to the professional category at the country level, different patterns emerge. In Sweden for example, two-thirds of returnee doctors returned from EU and EFTA countries, while 57 % of nurses and 79 % of personal care workers returned from third countries. Meanwhile, Spain saw just 10 % of its medical doctors and personal care workers return from EU and EFTA countries, and 69 % of its returnee nurses come from

[222] It is possible that some in the healthcare industry naturalised during the period, though it is not possible to know what portion they represent.

these countries. In Germany the majority of workers in all professional categories are returning from third countries.

4.4.2. Profile of returnees

In Austria, Czechia, Germany, Spain and Switzerland, the majority of healthcare workers who returned within the last ten years, are medical doctors and nurses/midwives; while in Belgium, Italy, Sweden, and the Netherlands it is personal care workers.

Across all professional categories, females are the majority of the returnees, from doctors at 56 % to nurse/midwife associates and other health associates' returnees that are solely female[223]. Of returnees who are doctors, 58 % are female. Amongst nurses/ midwives 95 % of returnees are female, while 89 % of nationals are female. And for personal care workers, females account for only two-thirds of returnees, as compared to 86 % of nationals. The only notable divergence is among returnee doctors in Czechia which are only 42 % female and the same group in Sweden, which is 100 % female.

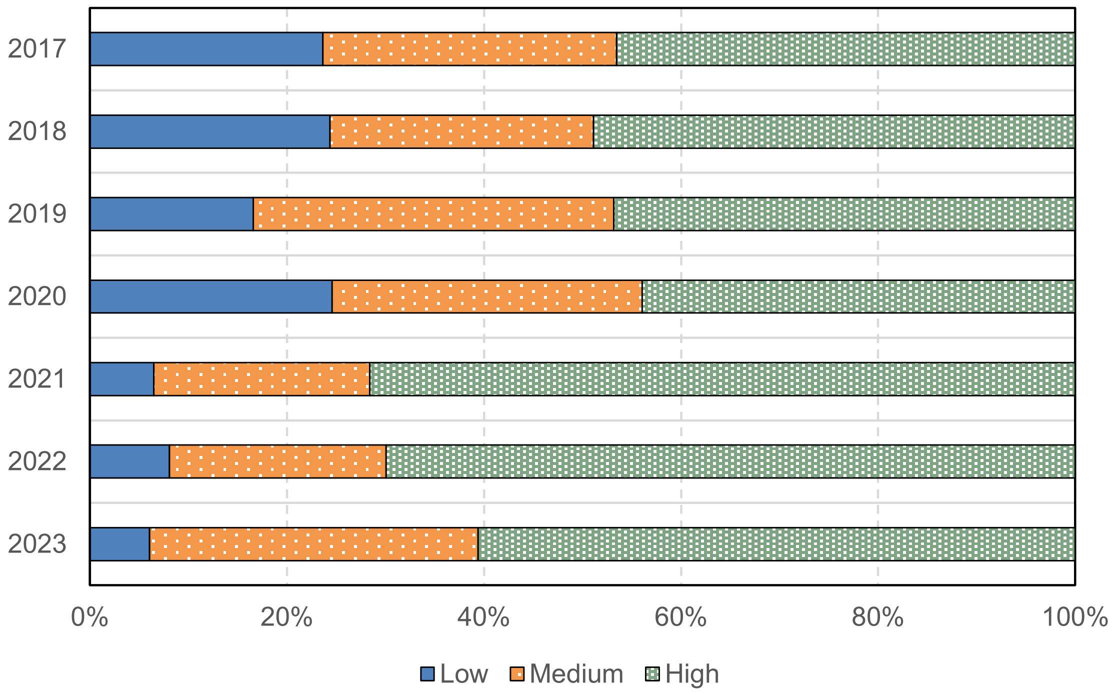
The stock of returnees is either equally or more educated, on average, than their national counterparts, apart from personal care workers. Doctors, both returnees and nationals, all have high educational attainment. On the other hand, all returnee nurses/midwives have high educational attainment, while only 77 % of nationals have the same level of education[224]. A similar picture emerges for both nurse/midwife associates and other health associates. Only returnee personal care workers are slightly less educated with 78 % having medium or high education compared to 81 % of nationals.

Prior to 2020, 20 to 30 % of the stock of returnees was comprised of healthcare professionals with low educational attainment. Following 2020, this portion of returnees fell to and remained close to 10 % of all returnees, see Figure 78. Concurrently, the share of all healthcare professionals who were personal care workers dropped from 77 % in 2020 to 40 % in 2021 and beyond.

[223] The absolute numbers of returnees by gender in all available EU and EFTA countries in 2018 and 2023 are shown in Table 49 in Annex B.3.

[224] The classification of educational levels and/or qualifications required may vary between Member States.

Figure 78: Educational attainment of returnees in healthcare professions by year, 2017 - 2023[225]



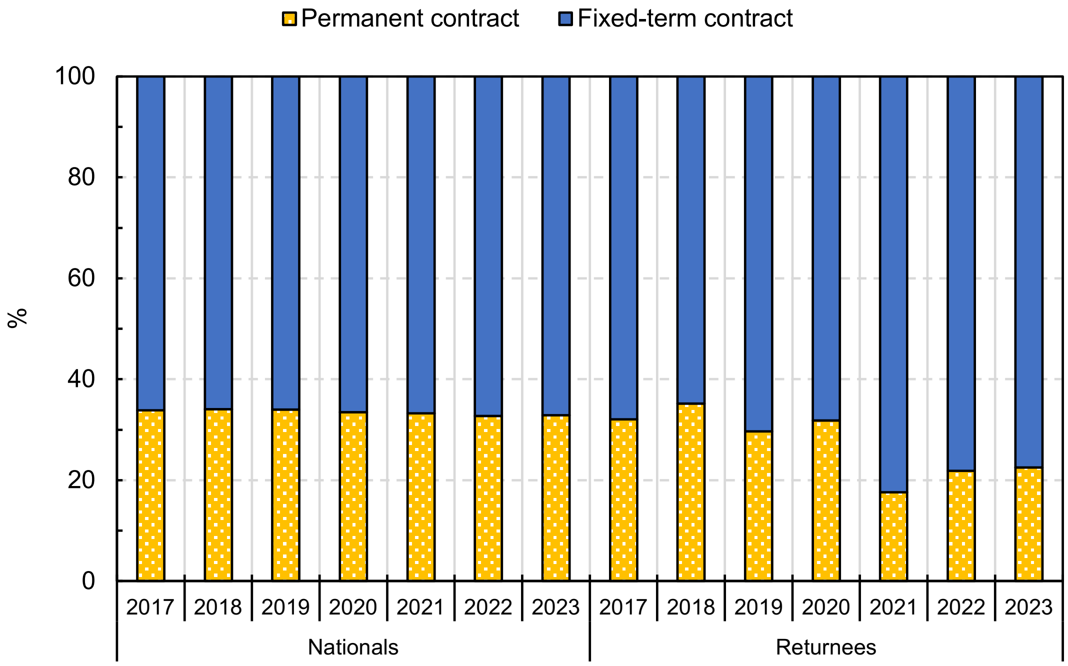
Note: Data on low educational attainment of returnees were only reported by Italy, Spain, and Sweden in 2017 and 2018. Italy did not report in 2019, but did again in 2020 and 2021, then no more. Spain reported in all years except for 2020 and 2021. Sweden reported for all years.
Source: EU-LFS 2024, custom extraction by Milieu.

To assess the economic reintegration of returnees, their working conditions are examined, focusing on full-time versus part-time employment and permanent versus fixed-term contracts. Recognising that part-time work is more prevalent in some Member States or preferred in certain professions, such as healthcare, data on full-time versus part-time employment for returnees are compared with that of nationals. In 2023, returnees working as medical doctors, nurses/midwives, nurse/midwife associates, and other health associates, reported near total full-time employment. This contrasts with nationals, of which 66 % to 80 % experience full-time employment in these same professional categories. When it comes to personal care workers, the largest category of healthcare professionals, nearly half of returnees (48 %) are working in part-time positions. This is in comparison to 36 % of nationals in this profession.

The situation has evolved over time. While the portion of national healthcare professionals working part-time has held steady between 31 % and 33 % since 2017, returnees have seen an evolution: from a peak of 46 % of returnees working part-time in 2018, to the current low of 21 % working in part-time positions, see Figure 79.

[225] The absolute numbers of returnees by education in all available EU and EFTA countries in 2018 and 2023 are shown in Table 55 in Annex B.3.

Figure 79: Part-time versus full-time for nationals and returnees in healthcare professions, 2017-2023[226]



Source: EU-LFS 2024, custom extraction by Milieu.

As for the type of contract, the situation for returnees compared to nationals varies by professional category. The stock of returnees in 2023 was more likely to have a fixed term contract as a medical doctor, nurse/midwife, and personal care worker.

For medical doctors, Switzerland has the highest rate of fixed-term contracts among returnees (52 %), it also has one of the highest rates of fixed-term contracts among nationals (38 %), second only to the Netherlands (47 %)[227]. In Spain nearly two-thirds of nurses/midwives are working on fixed-term contracts in comparison to 38 % of nationals. For personal care workers, the highest rate of fixed-term contracts for returnees is (60 %) in France, that is 47 pps higher than nationals. The proportion of fixed-term contracts held steady at around 15 % for nationals across all professional categories from 2017 to 2023. During this same period, the proportion for returnees peaked at 40 % in 2019 before falling to 32 % in 2023.

4.5. Conclusion

Several EU and EFTA Member States are projected to face substantial difficulties in meeting future healthcare needs. Countries like Austria, Iceland, Ireland, Luxembourg, Spain and Switzerland are predicted to experience a dramatic increase in their over-65 population by 2035. This demographic shift, combined with a shrinking working-age population, will place a strain on healthcare systems and the workforce responsible for supporting them.

[226] The absolute numbers of returnees by full-time vs. part-time in all available EU and EFTA countries in 2018 and 2023 are shown in Table 54 in Annex B.3.

[227] Data in Switzerland on fixed-term versus permanent contract is only available for medical doctors, for all other categories data is only available for permanent positions.

The analysis highlights a projected shortage of medical doctors in countries such as Germany, France, Italy, and Greece over the next decade. While Germany and France already attract EU movers in healthcare professions, their demand for medical professionals is expected to grow further. Italy faces a dual challenge of insufficient medical school graduates and an outflow of doctors to other Member States, alongside the highest projected dependency ratio in the EU. Although Italy successfully attracts significant numbers of personal care workers and, to a lesser extent, nurses, it has not achieved the same for medical doctors. Greece, meanwhile, is grappling with high levels of unmet medical needs, an ageing population leading to a rising dependency ratio, and a shortage of doctors. While Greece has attracted EU mover doctors, it is unclear whether this influx is sufficient or sustainable in the long term. These examples underscore the critical importance of both retaining and attracting skilled healthcare professionals, including EU movers, to maintain adequate staffing levels across the healthcare sector.

For eastern European Member States a different situation emerges from a complex interplay of factors. While Member States like Poland and Romania are projected – assuming doctors stay in their profession until retirement and the number of doctors per 10 000 inhabitants is sufficient – to train more doctors than those projected to retire[228], they are also some of the top countries of origin for many EU movers. Others, like Estonia, face a deficit of doctors, healthcare spending that is at or below 2015 levels, a high level of unmet medical needs, and a sizeable portion of its nurses working in other Member States. Latvians report high levels of unmet healthcare needs, while the equivalent of 15 % of its doctors are practicing in other Member States.

The analysis also examines healthcare professionals returning to their home countries. However, it is not apparent that these inflows of returnees are sufficient to offset the outflows of EU movers. Nonetheless, returnees represent a valuable source of skilled healthcare professionals, offering Member States an opportunity to strategically attract and reintegrate them to address critical needs within their healthcare sectors.

By highlighting these trends and challenges, this analysis provides insights into the evolving needs of the EU's healthcare sector in a rapidly changing demographic and economic landscape.

[228] There are reasons for leaving the profession besides retirement, though it is not possible to estimate this number with the data available for this report.

Annex A: Table of tables and figures

A.1 List of figures

A.2 List of tables

A.3 List of boxes

Annex B: Data annex

B.1: Recent developments on the mobile working-age population

Table 18: Composition of inflows of movers to EU and EFTA countries (in 1 000s and %), 2021-2022

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
EU-27	**762**	**860**	**27**	**15**	**-12**	**656**	**738**	**23**	**18**	**-5**	**1 381**	**3252**	**49**	**67**	**18**
AT	51	58	56	5	-51	7	7	7	42	35	33	75	37	53	16
BE	49	53	48	7	-41	12	11	11	36	25	42	83	41	57	16
BG	5	6	16	43	27	15	12	53	21	-32	9	10	31	36	5
CY	6	5	33	11	-22	3	3	16	18	2	10	18	51	70	19
CZ	12	11	21	1	-20	3	3	4	5	1	43	216	75	94	19
DE	236	241	36	7	-29	111	102	17	18	1	313	1031	47	75	28
DK	24	35	49	14	-35	11	12	22	39	17	15	43	29	48	19

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
EE	4	3	22	17	-5	6	5	35	9	-26	7	25	43	74	31
EL	2	3	5	41	36	20	26	53	4	-49	16	36	42	55	13
ES	80	148	21	10	-11	46	88	12	16	4	251	683	67	74	7
FI	7	6	25	13	-12	6	5	20	16	-4	15	26	55	70	15
FR	40	47	17	26	9	69	77	30	16	-14	122	167	53	58	5
HR	4	4	12	15	3	7	7	25	8	-17	19	37	63	77	14
HU	10	8	14	43	29	28	33	41	11	-30	31	35	45	46	1
IE	12	22	20	20	0	25	22	43	19	-24	22	70	37	61	24
IT	35	38	15	16	1	50	49	21	13	-8	152	213	64	71	7
LT	1	0	2	24	22	18	15	48	1	-47	19	47	50	75	25
LU	13	12	64	4	-60	1	1	5	51	46	6	11	31	45	14
LV	1	0	6	24	18	5	6	47	2	-45	5	20	48	74	26
MT	6	6	38	4	-34	2	1	13	19	6	7	24	48	77	29

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
NL	72	76	46	10	-36	25	24	16	33	17	61	134	39	57	18
PL	62	32	33	28	-5	29	57	15	16	1	96	118	51	57	6
PT	2	10	6	45	39	29	40	75	12	-63	7	38	19	43	24
RO	8	8	5	76	71	119	119	76	5	-71	30	30	19	19	0
SE	19	25	29	12	-17	9	9	14	33	19	37	41	57	55	-2
SI	2	2	12	9	-3	3	2	15	7	-8	13	23	74	83	9
SK	1	1	52	33	-19	1	1	32	46	14	0	0	16	20	4
EFTA	**97**	**116**	**60**	**9**	**-51**	**20**	**20**	**12**	**56**	**44**	**45**	**73**	**28**	**35**	**7**
CH	69	86	61	11	-50	14	14	13	65	52	113	32	26	24	-2
IS	5	8	65	8	-57	1	1	17	63	46	7	4	18	29	11
NO	23	22	56	6	-50	4	4	10	34	24	41	37	34	59	25

Note*:* Data from 2021 used in 2022 for Romania. EFTA movers excluded due to low numbers.

Source: Eurostat international migration statistics (Migr_imm1ctz), Milieu calculations.

Table 19:Composition of outflows of movers from EU and EFTA countries (in 1 000s and %), 2021-2022

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
EU-27	**518**	**475**	**26**	**25**	**-1**	**793**	**835**	**40**	**45**	**5**	**679**	**557**	**34**	**30**	**-4**
AT	30	32	58	56	**-2**	9	13	17	23	**5**	13	12	25	21	**-4**
BE	27	27	44	42	**-2**	20	22	32	34	**2**	15	16	24	25	**0**
BG	0	0	0	0	**0**	19	8	90	89	**-2**	2	1	10	11	**2**
CY															
CZ	2	6	13	21	**9**	2	4	13	14	**2**	12	18	75	64	**-11**
DE	172	165	39	38	**-1**	163	170	37	39	**2**	106	97	24	22	**-2**
DK	15	15	42	42	**0**	9	9	25	25	**0**	12	12	33	33	**0**
EE	3	2	30	25	**-5**	5	4	50	50	**0**	2	2	20	25	**5**
EL															
ES	139	114	26	28	**2**	109	98	20	24	**4**	290	191	54	47	**-7**

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
FI	2	3	20	23	**3**	6	7	60	54	**-6**	2	3	20	23	**3**
FR															
HR	1	1	3	3	**0**	19	24	58	65	**7**	13	12	39	32	**-7**
HU	9	4	15	8	**-7**	20	27	32	51	**19**	33	22	53	42	**-12**
IE	9	7	21	15	**-7**	22	23	52	48	**-4**	11	18	26	38	**11**
IT	18	15	15	13	**-2**	71	77	60	67	**7**	30	23	25	20	**-5**
LT	0	0	0	0	**0**	17	11	77	85	**7**	5	2	23	15	**-7**
LU	8	9	67	69	**3**	2	2	17	15	**-1**	2	2	17	15	**-1**
LV	0	1	0	7	**7**	7	9	70	64	**-6**	3	4	30	29	**-1**
MT	4	4	36	33	**-3**	1	1	9	8	**-1**	6	7	55	58	**4**
NL	36	35	41	42	**0**	30	33	34	39	**5**	21	16	24	19	**-5**
PL	24	18	14	9	**-5**	109	138	64	71	**7**	38	38	22	20	**-3**

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
PT															
RO	7	7	4	4	**0**	130	130	72	72	**0**	43	43	24	24	**0**
SE	10	8	29	24	**-5**	16	18	46	53	**7**	9	8	26	24	**-2**
SI	2	2	12	12	**0**	4	5	24	29	**6**	11	10	65	59	**-6**
SK	0	0	0	0	**0**	3	3	100	100	**0**	0	0	0	0	**0**
EFTA	**65**	**69**	**54**	**55**	**1**	**27**	**31**	**22**	**25**	**2**	**29**	**25**	**24**	**20**	**-4**
CH	48	52	53	55	**1**	21	23	23	24	**1**	21	20	23	21	**-2**
IS	3	2	75	67	**-8**	1	1	25	33	**8**	0	0	0	0	**0**
NO	14	14	52	56	**4**	6	6	22	24	**2**	7	5	26	20	**-6**

Note: Data not available for Cyprus, France, Greece, and Portugal. For 2017-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Figures for Sweden and Belgium were calculated by taking the average of 2020 and 2022 data. 2021 values used for Romania and Denmark. Only data for all age groups, not the 20-64 age range examined in this report, was available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

Source: Eurostat international migration statistics (Migr_emi1ctz), Milieu calculations.

Table 20: Inflows of EU movers to EU and EFTA countries by gender (in 1 000s and %), 2021-2022

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022	
EU-27	**321**	**373**	**42**	**43**	**1**	**441**	**487**	**58**	**57**	**-1**
AT	22	26	44	45	**1**	29	32	56	55	**-1**
BE	22	24	45	45	**0**	27	29	55	55	**0**
BG	1	2	32	32	**0**	3	4	68	68	**0**
CY	3	2	47	42	**-5**	3	3	53	58	**5**
CZ	5	4	40	38	**-2**	7	7	60	62	**2**
DE	92	94	39	39	**0**	144	147	61	61	**0**
DK	9	14	38	40	**2**	15	21	62	60	**-2**
EE	1	1	37	37	**0**	2	2	63	63	**0**
EL	1	2	51	53	**2**	1	1	49	47	**-2**
ES	38	71	48	48	**0**	41	77	52	52	**0**
FI	2	2	34	38	**4**	5	4	66	62	**-4**
FR	20	24	50	51	**1**	20	23	50	49	**-1**
HR	2	2	46	46	**0**	2	2	54	54	**0**
HU	4	4	46	42	**-4**	5	5	54	58	**4**
IE	4	10	35	47	**12**	8	11	65	53	**-12**
IT	20	21	58	56	**-2**	15	17	42	44	**2**
LT	0	0	33	44	**11**	1	0	67	56	**-11**
LU	5	5	42	44	**2**	7	7	58	56	**-2**
LV	0	0	36	30	**-6**	0	0	64	70	**6**
MT	2	2	38	40	**2**	4	4	62	60	**-2**

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022	
NL	32	34	45	44	**-1**	40	42	55	56	**1**
PL	19	10	31	32	**1**	43	22	69	68	**-1**
PT	2	4	61	42	**-19**	1	6	39	58	**19**
RO	3	3	38	38	**0**	5	5	62	62	**0**
SE	8	11	44	42	**-2**	11	15	56	58	**2**
SI	1	1	39	38	**-1**	1	1	61	62	**1**
SK	0	0	37	40	**3**	1	1	63	60	**-3**
EFTA	**39**	**46**	**40**	**40**	**0**	**58**	**70**	**60**	**60**	**0**
CH	29	35	42	41	**-1**	40	51	58	59	**1**
IS	2	2	35	32	**-3**	3	5	65	68	**3**
NO	9	8	37	39	**2**	15	13	63	61	**-2**

Note: 2021 data used in 2022 for Romania.

Source: Eurostat international migration statistics (Migr_imm1ctz), Milieu calculations.

Table 21: Inflows of EU movers to EU and EFTA countries by age group (in 1 000s and %), 2021-2022

	20 to 34					35 to 49					50 to 64				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
EU-27	**414**	**459**	**54**	**53**	**-1**	**236**	**270**	**31**	**31**	**0**	**112**	**131**	**15**	**15**	**0**
AT	29	33	57	57	0	15	17	29	29	0	7	8	14	14	0
BE	29	31	59	59	0	15	15	30	29	-1	6	6	12	11	-1
BG	2	2	38	33	-5	1	2	31	32	1	1	2	30	35	5
CY	4	3	57	58	1	2	1	31	27	-4	1	1	13	15	2
CZ	6	6	55	51	-4	4	4	32	35	3	2	1	14	14	0
DE	130	133	55	55	0	75	76	32	32	0	31	32	13	13	0
DK	16	23	66	67	1	6	9	26	25	-1	2	3	8	8	0
EE	2	2	64	59	-5	1	1	24	26	2	0	0	12	15	3
EL	1	1	45	45	0	1	1	31	35	4	0	1	24	20	-4
ES	37	61	47	41	-6	24	53	30	36	6	18	34	23	23	0
FI	4	3	54	55	1	2	2	35	34	-1	1	1	11	11	0

	20 to 34					35 to 49					50 to 64				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
FR	22	26	55	57	2	11	12	29	27	-2	7	8	17	17	0
HR	1	2	41	42	1	1	1	29	27	-2	1	1	30	31	1
HU	4	3	42	40	-2	3	2	26	28	2	3	3	32	32	0
IE	6	11	52	52	0	4	9	36	40	4	1	2	12	8	-4
IT	3	15	40	40	0	1	13	35	36	1	0	9	25	24	-1
LT	14	0	49	49	0	12	0	36	39	3	9	0	16	12	-4
LU	0	7	58	58	0	0	4	30	30	0	0	1	12	12	0
LV	7	0	56	55	-1	4	0	28	27	-1	2	0	16	18	2
MT	0	4	59	64	5	0	2	29	26	-3	0	1	12	10	-2
NL	3	53	70	70	0	2	18	23	23	0	1	5	7	7	0
PL	51	13	41	40	-1	16	14	44	44	0	5	5	15	16	1
PT	26	5	50	51	1	27	3	30	31	1	9	2	20	17	-3
RO	1	3	45	45	0	1	2	32	32	0	1	2	23	23	0

	20 to 34					35 to 49					50 to 64				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022		2021	2022	2021	2022	
SE	3	15	61	60	-1	2	7	29	30	1	2	3	10	11	1
SI	12	1	42	45	3	5	1	37	35	-2	2	0	21	20	-1
SK	1	0	44	47	3	1	0	36	36	0	0	0	20	17	-3
EFTA	**57**	**67**	**58**	**58**	**0**	**30**	**36**	**31**	**31**	**0**	**10**	**12**	**10**	**11**	**1**
CH	40	50	59	57	-2	21	27	31	32	1	7	10	11	11	0
IS	3	5	67	65	-2	1	2	25	27	2	0	1	8	8	0
NO	13	13	56	58	2	8	7	34	32	-2	2	2	10	9	-1

Note: 2021 data used in 2022 for Romania.

Source: Eurostat international migration statistics (Migr_imm1ctz), Milieu calculations.

Table 22: EU movers and third-country nationals in the EU by gender (in 1 000s and %), 2017-2023

Nationality	Gender	2017	2018	2019	2020	2021	2022	2023
EU movers	Male	4 763 (51%)	4 928 (51%)	5 066 (51%)	5 118 (51%)	5 128 (51%)	5 087 (51%)	5 167 (51%)
	Female	4 646 (49%)	4 772 (49%)	4 864 (49%)	4 906 (49%)	4 897 (49%)	4 881 (49%)	4 956 (49%)
Third-country nationals	Male	7 115 (51%)	7 439 (51%)	7 793 (51%)	8 349 (52%)	8 702 (52%)	8 772 (52%)	9 927 (51%)
	Female	6 843 (49%)	7 126 (49%)	7 393 (49%)	7 855 (48%)	8 119 (48%)	8 251 (48%)	9 540 (49%)

Note: Percentages in brackets indicate the size of the age group as a percentage of all EU movers. EU-28 values used in 2016, as well as for Germany (2017-2019), Cyprus, Greece, France, Croatia, Malta, and Poland (2017-2020). For Romania, as 2022 data was not available, an average between the 2021 and 2023 values has been calculated.

Source: Eurostat [migr_pop1ctz], Milieu calculations

Table 23: Population on 1 January of EU movers in EU and EFTA countries (1 000s), 2018-2023

MS	2018	2019	2020	2021	2022	2023	2022/2023 change (%)
EU-27	**12 878**	**12 949**	**9 942**	**10 023**	**9 933**	**10 122**	**2**
AT	520	546	563	588	610	641	**5**
BE	617	630	630	642	657	674	**3**
BG	9	9	7	8	12	14	**21**
CY	87	93	85	75	73	71	**-3**
CZ	184	193	195	200	140	144	**3**
DE	3 200	3 321	3 290	3 330	3 360	3 410	**1**
DK	171	180	168	171	186	202	**9**
EE	16	17	17	16	17	18	**7**
EL	158	157	128	119	87	87	**0**
ES	1 385	1 406	1 280	1 285	1 280	1 230	**-4**
FI	75	76	73	74	78	80	**3**
FR	960	969	911	898	894	930	**4**

MS	2018	2019	2020	2021	2022	2023	2022/2023 change (%)
HR	10	10	11	12	7	10	**47**
HU	61	58	61	58	59	62	**5**
IE	336	346	275	279	283	278	**-2**
IT	1 201	1 147	1 125	1 073	1 037	1 036	**0**
LT	5	5	6	5	7	2	**23**
LU	170	172	169	170	172	172	**0**
LV	5	5	5	5	5	5	**-3**
MT	30	36	27	35	37	36	**-3**
NL	414	447	449	474	514	558	**9**
PL	25	26	27	61	25	24	**-4**
PT	97	113	111	117	125	125	**0**
RO	47	49	49	49	13	43	**-6**
SE	227	231	218	213	215	223	**4**
SI	16	17	17	17	16	16	**-2**
SK	45	46	46	47	31	31	**2**
EFTA	**1 307**	**1 327**	**1 312**	**1 335**	**1 356**	**1 391**	**3**
CH	1 007	1 018	1 004	1 023	1 041	1 073	**3**
IS	27	32	34	35	37	42	**14**
NO	273	277	274	277	278	276	**-1**

Note: For Romania, as 2022 data was not available, an average between the 2021 and 2023 values has been calculated.

Source: Eurostat [migr_pop1ctz], Milieu calculations

Table 24: Stock of EU movers and third-country nationals in EU and EFTA countries (in 1 000s and % of total working-age population), 2022-2023

	EU movers					Third-country nationals				
	1 000s		% of w-a pop.		Diff. (Pps)	1 000s		% of w-a pop.		Diff. (Pps)
	2022	2023	2022	2023		2022	2023	2022	2023	
EU-27	**9 933**	**10 122**	**4**	**4**	**0**	**16 929**	**19 467**	**6**	**7**	**1**
AT	610	641	11	12	1	523	587	10	11	**1**
BE	657	674	10	10	0	390	441	6	6	**0**
BG	12	14	0	0	0	74	46	2	1	**-1**
CY	73	71	13	12	-1	59	69	10	12	**2**
CZ	140	144	2	2	0	292	489	5	8	**3**
DE	3 360	3 410	7	7	0	4 550	5 366	9	11	**2**
DK	186	202	5	6	1	229	254	7	7	**0**
EE	17	18	2	2	0	115	133	15	17	**2**
EL	87	87	1	1	0	480	492	8	8	**0**
ES	1 280	1 230	4	4	0	2 595	3 265	9	11	**2**
FI	78	80	2	3	0	145	164	5	5	**0**
FR	894	930	2	2	0	2 493	2 665	7	7	**0**
HR	7	10	0	0	0	20	44	1	2	**1**
HU	59	62	1	1	0	103	117	2	2	**0**
IE	283	278	10	9	-1	243	311	8	10	**2**
IT	1 037	1 036	3	3	0	2 614	2 692	8	8	**0**
LT	7	2	0	0	0	62	70	4	4	**0**
LU	172	172	41	40	-1	43	49	10	12	**2**
LV	5	5	0	0	0	133	141	12	13	**1**
MT	37	36	11	10	-1	51	80	15	23	**8**

	EU movers					Third-country nationals				
	1 000s		% of w-a pop.		Diff. (Pps)	1 000s		% of w-a pop.		Diff. (Pps)
	2022	2023	2022	2023		2022	2023	2022	2023	
NL	514	558	5	5	0	439	537	4	5	**1**
PL	25	24	0	0	0	350	335	2	2	**0**
PT	125	125	2	2	0	409	444	7	7	**0**
RO	13	43	0	0	0	22	118	0	1	**1**
SE	215	223	4	4	0	422	408	7	7	**0**
SI	16	16	1	1	0	118	130	9	10	**1**
SK	31	31	1	1	0	18	19	1	1	**0**
EFTA	**1 356**	**1 391**	**15**	**16**	**-1**	**735**	**765**	**8**	**9**	**1**
CH	1 041	1 073	20	20	0	567	578	11	11	**0**
IS	37	42	16	18	2	9	12	4	5	**1**
NO	278	276	9	9	0	159	176	5	5	**0**

Note: For Romania, as 2022 data was not available, an average between the 2021 and 2023 values has been calculated

Source: Eurostat population statistics (Migr_pop1ctz), Milieu calculations.

Table 25: Stock of EU movers by gender in EU and EFTA countries, 2022-2023

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2022	2023	2022	2023		2022	2023	2022	2023	
EU-27	**4 881**	**4 956**	**49**	**49**	0	**5 087**	**5 167**	**51**	**51**	0
AT	305	319	50	50	0	305	321	50	50	0
BE	320	329	49	49	0	337	345	51	51	0
BG	4	5	34	34	0	8	9	66	66	0
CY	40	38	54	54	-1	33	33	46	46	1
CZ	61	63	44	44	0	79	81	56	56	0

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2022	2023	2022	2023		2022	2023	2022	2023	
DE	1 536	1 558	46	46	0	1 824	1 852	54	54	0
DK	85	91	45	45	0	102	111	55	55	0
EE	6	7	35	36	0	11	12	65	64	0
EL	58	58	67	67	0	29	29	33	33	0
ES	638	618	50	50	0	642	612	50	50	0
FI	32	33	41	41	0	46	47	59	59	0
FR	440	464	49	50	1	454	466	51	50	-1
HR	4	5	54	52	-2	3	5	46	48	2
HU	26	27	44	44	0	33	35	56	56	0
IE	144	140	51	50	-1	139	138	49	50	1
IT	632	630	61	61	0	405	406	39	39	0
LT	0	1	35	38	3	1	1	65	62	-3
LU	80	80	47	47	0	91	91	53	53	0
LV	2	2	34	35	1	3	3	66	65	-1
MT	15	15	40	43	4	22	20	60	57	-4
NL	258	278	50	50	0	256	280	50	50	0
PL	7	7	27	27	0	18	18	73	73	0
PT	61	61	49	49	0	64	64	51	51	0
RO	14	13	29	31	1	33	30	71	69	-1
SE	96	98	45	44	-1	119	125	55	56	1
SI	6	6	39	40	1	10	10	61	60	-1
SK	11	11	36	36	0	20	20	64	64	0
EFTA	**585**	**597**	**43**	**43**	0	**771**	**794**	**57**	**57**	0

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2022	2023	2022	2023		2022	2023	2022	2023	
CH	459	472	44	44	0	582	601	56	56	0
IS	14	16	39	38	-1	23	26	61	62	1
NO	111	110	40	40	0	167	166	60	60	0

Note: For Romania, as 2022 data was not available, an average between the 2021 and 2023 values has been calculated. Percentages indicate the proportion of male or female movers in the given year. Differences in percentage points indicate the change in this proportion between 2021 and 2022; due to rounding, values in the table may not add up exactly.

Source: Eurostat population statistics [Migr_pop1ctz], Milieu calculations

Table 26: Stocks of EU movers by age group in EU and EFTA countries (in 1 000s), 2022-2023

	0 to 19			20 to 34			35 to 49			50 to 64			65 and older		
	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)
EU -27	**2 317**	**2 367**	2	**3 388**	**3 302**	-3	**4 042**	**4 008**	-1	**2 595**	**2 630**	**1**	**1 384**	**1 409**	2
AT	160	167	4	221	224	1	232	242	4	135	144	7	52	56	8
BE	181	184	2	213	218	2	240	244	2	189	195	3	118	121	3
BG	1	1	38	1	3	200	3	4	33	3	4	33	3	3	0
CY	15	16	10	31	29	-6	30	31	3	14	14	0	6	6	0
CZ	21	23	11	58	43	-26	97	70	-28	45	28	-38	21	12	-43
DE	716	728	2	1212	1203	-1	1291	1298	1	827	859	4	434	447	3
DK	39	42	8	84	90	7	61	68	11	26	28	8	10	11	10
EE	2	2	3	8	8	0	5	6	20	3	4	33	2	2	0
EL	14	13	-4	17	19	12	51	37	-27	51	31	-39	20	14	-30
ES	269	279	4	379	365	-4	569	563	-1	337	351	4	180	192	7
FI	19	19	2	24	24	0	32	34	6	18	19	6	6	6	0

	0 to 19			20 to 34			35 to 49			50 to 64			65 and older		
	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)
FR	290	301	4	234	233	0	326	324	-1	337	338	0	300	302	1
HR	1	1	48	3	2	-33	5	3	-40	5	2	-60	7	3	-57
HU	7	8	3	25	25	0	18	18	0	15	17	13	11	12	9
IE	62	58	-6	90	85	-6	151	156	3	38	42	11	9	10	11
IT	285	281	-1	302	259	-14	474	471	-1	297	307	3	59	67	14
LT	0	0	25	3	3	0	3	3	0	1	1	0	1	1	0
LU	48	47	-3	49	49	0	70	70	0	51	53	4	25	26	4
LV	1	1	1	1	1	0	2	2	0	2	2	0	1	1	0
MT	5	5	-3	18	19	6	12	13	8	5	5	0	3	3	0
NL	107	115	8	225	245	9	173	186	8	77	83	8	28	29	4
PL	3	3	-2	28	9	-68	23	11	-52	10	6	-40	5	5	0
PT	17	17	3	47	49	4	41	45	10	29	32	10	26	28	8
RO	3	3	-16	17	4	-76	18	5	-72	14	4	-71	8	4	-50

	0 to 19			20 to 34			35 to 49			50 to 64			65 and older		
	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)	2022	2023	Diff. (%)
SE	47	47	1	82	82	0	84	86	2	46	47	2	39	39	0
SI	2	2	3	4	4	0	7	7	0	5	6	20	3	3	0
SK	2	2	1	12	9	-25	21	14	-33	14	8	-43	9	5	-44
EFTA	**334**	**337**	1	**424**	**426**	0	**573**	**581**	1	**338**	**349**	3	**150**	**152**	1
CH	260	264	2	316	320	1	431	437	1	276	285	3	135	136	1
IS	6	6	8	18	19	6	12	13	8	5	5	0	1	1	0
NO	68	67	-2	90	88	-2	130	131	1	57	59	4	15	15	0

Note: For Romania, as 2022 data was not available, an average between the 2021 and 2023 values has been calculated

Source: Eurostat population statistics (Migr_pop1ctz), Milieu calculations.

Table 27: Returning nationals by country of return (1 000s), 2018-2022

MS	2018	2019	2020	2021	2022	Change 2018-2022 (%)
EU-27	678	721	589	656	738	9
AT	7	7	7	7	7	0
BE	12	12	12	12	11	-8
BG	11	16	18	15	12	9
CY	4	4	2	3	3	-25
CZ	4	4	3	3	3	-25
DE	108	115	108	111	102	-6
DK	13	13	13	11	12	-8
EE	7	6	5	6	5	-29
EL	23	24	15	20	26	13
ES	52	53	34	46	88	69
FI	6	6	7	6	5	-17
FR	89	89	56	69	77	-13
HR	6	7	6	7	7	17
HU	30	30	29	28	33	10
IE	23	16	24	25	22	-4
IT	31	46	37	50	49	58
LT	14	18	18	18	15	7
LU	1	1	1	1	1	0
LV	3	3	3	5	6	100
MT	1	1	1	2	1	0
NL	29	30	29	25	24	-17
PL	54	50	34	29	57	6
PT	16	20	18	29	40	150
RO	118	136	92	119	119	1
SE	11	10	10	9	9	-18
SI	3	2	6	3	2	-33
SK	1	1	1	1	1	0
EFTA	21	21	22	20	20	-5

MS	2018	2019	2020	2021	2022	Change 2018-2022 (%)
CH	16	16	17	14	14	-13
IS	1	1	1	1	1	0
NO	4	3	4	4	4	0

Note : 2021 data used in 2022 for Romania

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

Table 28: Total number of PDs A1 issued by sending Member State (1 000s), 2018-2022

MS	2019	2020	2021	2022	2023	Change 2022-2023 (%)
EU-27	**4 512**	**3 676**	**3 533**	**4 460**	**5 244**	**+18**
AT	198	105	107	140	169	+21
BE	151	124	128	143	160	+12
BG	30	26	26	27	27	+0.2
CY	4	4	3	3	3	
CZ	81	61	68	70	80	+16
DE	1 799	1 397	997	1 608	2 016	+25
DK	53	44	38	47	45	-6
EE	23	22	21	17	16	-9
EL	9	9	9	26	26	0
ES	252	176	212	271	268	-1
FI	10	9	9	12	29	+143
FR	126	62	102	166	208	+25
HR	67	71	84	84	83	-0.7
HU	71	44	69	69	85	+23
IE	7	6	2	5	5	
IT	216	216	275	315	361	+15
LT	95	94	111	109	127	+16
LU	92	68	66	71	84	+18
LV	23	24	24	24	25	+4

MS	2019	2020	2021	2022	2023	Change 2022-2023 (%)
MT	4	7	7	11	13	+21
NL	105	87	82	88	89	+1
PL	648	618	677	723	849	+18
PT	77	61	67	88	94	+6
RO	82	67	68	66	90	+36
SE	14	10	8	9	10	+5
SI	146	157	168	172	176	+3
SK	128	108	106	122	132	+8
EFTA	**79**	**50**	**85**	**145**	**264**	**+83**
CH	72	45	78	137	258	+87
IS	0.3	0.2	0.2	0.3	0.4	+30
NO	5	3	3	6	5	-10

Note: 2022 figures used for Ireland and Cyprus.

Source: De Wispelaere, et al. (forthcoming).

Table 29: Inflows, outflows, and net mobility of Member States' own citizens (1 000s), 2018-2022

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
EU/EFTA	**699**	**742**	**611**	**676**	**757**	**857**	**847**	**686**	**821**	**866**	**-290**	**-243**	**-167**	**-149**	**-255**
EU-27	**678**	**721**	**589**	**656**	**738**	**827**	**818**	**662**	**793**	**835**	**-281**	**-235**	**-165**	**-147**	**-244**
AT	7	7	7	7	7	10	11	9	9	13	-4	-4	-2	-3	-6
BE	12	12	12	12	11	24	23	18	20	22	-12	-11	-6	-9	-11
BG	11	16	18	15	12	24	30	3	19	8	-14	-14	15	-4	5
CY	4	4	2	3	3										
CZ	4	4	3	3	3	5	5	3	2	4	-1	-1	0	0	-1
DE	108	115	108	111	102	161	165	139	163	170	-52	-50	-31	-52	-68
DK	13	13	13	11	12	10	10	9	9	9	3	3	5	2	2
EE	7	6	5	6	5	5	5	5	5	4	1	1	-1	0	1
EL	23	24	15	20	26										
ES	52	53	34	88	88	57	56	47	109	98	-5	-3	-14	-21	-10
FI	6	6	7	6	5	9	8	7	6	7	-3	-2	0	-1	-2
FR	89	89	56	69	77										
HR	6	7	6	7	7	27	24	15	19	24	-21	-17	-9	-12	-17
HU	30	30	29	28	33	22	21	18	20	27	8	9	10	8	6

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
IE	23	16	24	25	22	20	21	17	22	23	4	-5	7	3	-1
IT	31	46	37	50	49	89	94	91	71	77	-57	-48	-54	-20	-28
LT	14	18	18	18	15	23	19	12	17	11	-8	-1	7	1	4
LU	1	1	1	1	1	2	2	2	2	2	-1	-1	-1	-1	-1
LV	3	3	3	5	6	9	8	6	7	9	-6	-4	-3	-2	-2
MT	1	1	1	2	1	1	1	1	1	1	0	0	0	1	1
NL	29	30	29	25	24	35	33	26	30	33	-6	-3	3	-5	-9
PL	54	50	34	29	57	106	102	85	109	138	-52	-52	-51	-81	-80
PT	16	20	18	29	40										
RO	118	136	92	119	119	163	159	129	130	130	-45	-23	-37	-11	-11
SE	11	10	10	9	9	16	15	15	16	18	-5	-5	-5	-7	-9
SI	3	2	6	3	2	5	5	4	4	5	-2	-2	2	-1	-2
SK	1	1	1	1	1	2	3	2	3	3	-1	-2	-1	-2	-3
EFTA	**21**	**21**	**22**	**20**	**20**	**31**	**30**	**24**	**27**	**31**	**-9**	**-8**	**-2**	**-2**	**-11**
CH	16	16	17	14	14	23	23	19	21	23	-7	-6	-1	-6	-8
IS	1	1	1	1	1	2	1	1	1	1	0	0	0	0	0
NO	4	3	4	4	4	6	5	4	6	6	-2	-2	-1	-1	-2

Note: 2021 values used in 2022 for inflow data in Romania. Outflow and net flow data not available for Cyprus, France, Greece, and Portugal. For 2017-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Figures for Sweden and Belgium were calculated by taking the average of 2020 and 2022 data. 2021 values used for Romania and Denmark. Only data for all age groups, not the 20-64 age range examined in this report, was available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

Source: Eurostat international migration statistics (Migr_emi1ctz), Milieu calculations.

Table 30: Inflows, outflows, and net mobility of citizens of other Member States (1 000s), 2018-2022

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
EU/EFTA	**946**	**953**	**805**	**859**	**976**	**519**	**586**	**470**	**583**	**543**	**348**	**291**	**282**	**296**	**358**
EU-27	**853**	**860**	**723**	**762**	**860**	**451**	**523**	**413**	**518**	**475**	**324**	**262**	**257**	**266**	**311**
AT	52	54	51	51	58	26	28	27	30	32	26	26	24	21	27
BE	50	54	45	49	53	29	31	26	27	27	21	23	19	22	25
BG	1	1	1	5	6	0	0	0	0	0	1	1	1	4	6
CY	7	6	6	6	5										
CZ	15	28	15	12	11	2	29	8	2	6	12	-1	7	10	5
DE	300	279	243	236	241	168	199	160	172	165	132	80	84	64	76
DK	21	19	18	24	35	21	25	19	15	15	0	-5	-1	9	9
EE	4	3	3	4	3	2	4	4	3	2	2	0	-1	0	1
EL	12	10	5	2	3										
ES	108	113	63	142	148	81	74	52	139	114	28	39	10	3	34

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
FI	6	5	5	7	6	4	3	3	2	3	2	2	2	5	4
FR	53	50	34	40	47										
HR	2	2	3	4	4	1	1	1	1	1	1	1	2	3	3
HU	9	9	13	10	8	13	13	8	9	4	-4	-4	4	1	4
IE	23	21	15	12	22	12	13	11	9	7	11	9	4	3	15
IT	45	46	34	35	38	16	22	13	18	15	29	24	21	17	23
LT	1	1	1	1	0	0	0	0	0	0	1	1	1	0	0
LU	13	14	12	13	12	7	8	8	8	9	6	5	4	5	3
LV	1	1	0	1	0	0	0	0	0	1	0	0	0	0	0
MT	10	8	8	6	6	3	2	2	4	4	7	6	3	2	2
NL	66	75	63	72	76	33	35	34	36	35	33	40	29	36	41
PL	14	19	55	62	32	13	15	20	24	18	1	4	37	38	14
PT	6	10	6	2	10										
RO	7	8	5	8	8	5	8	5	7	7	3	0	0	1	1
SE	23	21	16	19	25	11	12	11	10	8	13	9	4	11	17
SI	3	3	2	2	2	2	2	2	2	2	1	1	0	0	0
SK	2	2	2	1	1	0	0	0	0	0	2	2	2	1	1

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
EFTA	**93**	**93**	**82**	**97**	**116**	**69**	**64**	**57**	**65**	**69**	**24**	**29**	**25**	**30**	**47**
CH	68	69	64	69	86	56	54	45	48	52	12	15	19	20	35
IS	8	6	4	5	8	2	2	4	3	2	6	4	1	2	5
NO	18	18	13	23	22	12	7	8	14	14	6	10	6	9	7

Note: 2021 values used in 2022 for inflow data in Romania. Outflow and net flow data not available for Cyprus, France, Greece, and Portugal. For 2017-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Figures for Sweden and Belgium were calculated by taking the average of 2020 and 2022 data. 2021 values used for Romania and Denmark. Only data for all age groups, not the 20-64 age range examined in this report, was available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

Source: Eurostat international migration statistics (Migr_emi1ctz), Milieu calculations.

Table 31: Inflows, outflows, and net mobility of third-country nationals (1 000s), 2018-2022

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
EU/EFTA	**1426**	**1606**	**1195**	**1426**	**3324**	**402**	**462**	**467**	**708**	**582**	**838**	**933**	**553**	**556**	**2456**
EU	**1381**	**1560**	**1156**	**1381**	**3252**	**376**	**436**	**441**	**679**	**557**	**819**	**913**	**540**	**542**	**2409**
AT	22	23	22	33	75	16	15	13	13	12	6	8	9	20	62
BE	40	44	33	42	83	15	26	15	15	16	25	18	18	43	68
BG	9	10	9	9	10	1	1	2	2	1	8	8	7	7	9

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
CY	10	12	11	10	18										
CZ	37	59	34	43	216	16	32	20	12	18	22	26	14	31	198
DE	270	283	208	313	1031	106	104	98	106	97	164	179	111	207	934
DK	16	15	13	15	43	19	21	17	12	12	-3	-6	-4	3	3
EE	5	5	6	7	25	1	2	2	2	2	3	4	4	13	23
EL	43	50	35	16	36										
ES	310	385	249	422	683	96	99	88	290	191	214	286	160	132	492
FI	11	13	13	15	26	2	2	3	2	3	9	11	10	14	24
FR	122	124	103	122	167										
HR	14	24	20	19	37	2	6	12	13	12	12	18	8	6	24
HU	33	39	22	31	35	7	10	34	33	22	26	28	-12	-2	13
IE	25	24	20	22	70	7	11	15	11	18	18	13	4	11	52
IT	166	148	110	152	213	14	24	16	30	23	152	124	94	122	190
LT	11	18	21	19	47	3	4	7	5	2	8	14	13	13	45
LU	5	6	5	6	11	2	2	2	2	2	4	4	3	4	8
LV	5	5	3	5	20	3	4	3	3	4	2	1	0	2	16
MT	12	15	7	7	24	4	4	4	6	7	9	11	3	1	17

Country	Inflows					Outflows					Net flows				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
NL	50	58	46	61	134	17	17	23	21	16	33	41	23	40	117
PL	65	77	67	96	118	21	21	28	38	38	44	56	39	58	80
PT	11	26	26	7	38										
RO	17	26	21	30	30	11	14	20	43	43	6	12	1	-13	-13
SE	53	50	33	37	41	9	9	10	9	8	44	42	24	29	33
SI	17	21	17	13	23	4	5	8	11	10	13	15	9	2	13
SK	1	0	1	0	0	0	0	0	0	0	1	0	1	0	0
EFTA	**45**	**45**	**39**	**45**	**73**	**26**	**26**	**26**	**29**	**25**	**19**	**20**	**13**	**14**	**47**
CH	29	29	27	30	32	23	22	21	21	20	6	7	6	8	12
IS	1	1	1	1	4	0	0	0	0	0	1	1	1	1	3
NO	14	15	10	14	37	3	4	4	7	5	11	11	6	7	32

Note: 2021 values used in 2022 for inflow data in Romania. Outflow and net flow data not available for Cyprus, France, Greece, and Portugal. For 2017-2019, 'EU movers' and 'Third-country nationals' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Figures for Sweden and Belgium were calculated by taking the average of 2020 and 2022 data. 2021 values used for Romania and Denmark. Only data for all age groups, not the 20-64 age range examined in this report, was available for the years of 2021 and 2022 in Germany, Ireland, Poland and Switzerland. To estimate the missing data, the proportion of individuals aged 20-64 was calculated as an average of 2017-2020 data and applied to the total outflows for 2021 and 2022.

Source: Eurostat international migration statistics (Migr_emi1ctz), Milieu calculations.

Table 32: Cross-border workers by country of residence and country of work, 2023

		Country of work																					
		EU-27	AT	BE	CZ	DE	DK	ES	FI	FR	HU	IE	IT	LU	NL	PL	PT	SE	SI	SK	EFTA	CH	NO
Country of residence	EU-27	1 384	174	107	26	400	43	26		55		15	37	243	124			19			449	396	51
	AT	39				29															10	10	
	BE	111				11				14				48	34								
	BG	14				7																	
	CZ	62	12			44	1			1			1	1		1		1		1	1		
	DE	185	29											63	46						66	65	
	DK	6				3												4					
	EE	10							7														
	EL	3																					
	ES	42		1		9	2			9		3	1		7		3				2	2	
	FI	3																					
	FR	249		59		49								129							216	215	
	HR	32	6			13							2						8		1		
	HU	97	61			22														3			
	IT	33	2	2		7		3		8					2						86	86	

	LT	11				5	1											1			8		7
	LU	7																					
	LV	13				4															5		4
	NL	25		9		12																	
	PL	205	15		14	136									15						24		21
	PT	18						7		5													
	RO	113	8	17		37		9					25										
	SE	33					24														13		13
	SI	25	18			2							2										
	SK	39	22		9						7												
	EFTA	16				6																	
	CH	13				8				2			1										

Note: Cross-border workers are defined as those workers who live in one EU or EFTA country but are employed in another. Differentiation is not made in this table of workers citizenship. Numbers in brackets indicate low reliability. To conserve space, only country-combinations with available data are displayed. As individual countries' values may be below publication thresholds, they do not necessarily add up to displayed EU aggregates. As the only EFTA country with available data for country of residence is Switzerland, no EFTA aggregate is provided for this indicator.

Source: EU-LFS 2024, custom extraction by Milieu.

B.2: The labour market integration of mobile workers

Table 33: Activity rate by nationality group and country of residence (%), 2018-2023

MS	2018			2019			2020			2021			2022			2023		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
EU-27	78	81	70	79	82	70	78	80	69	79	81	70	80	83	71	80	83	72
AT	81	82	70	81	82	70	81	83	68	81	83	72	81	85	72	82	85	71
BE	75	77	57	75	77	55	75	78	50	76	80	55	77	80	59	77	78	59
BG	76			78			77			77			79			80		
CY	82	(84)	(69)	82	(86)	(72)	81	86	74	82	(85)	79	83	90	79	84	89	82
CZ	82	(88)	(84)	82	(88)	(86)	82	(87)	(85)	82	(87)	(84)	83	(90)	(86)	84	88	86
DE	84	83	63	85	84	65	84	82	65	84	83	64	85	85	66	86	85	65
DK	82	85	67	83	(86)	(65)	83	(87)	69	83	(90)	(72)	84	(89)	79	84	88	78
EE	84		79	84		(79)	84		(80)	85		(78)	88		83	88		88
EL	73	73	78	74	68	78	73	74	76	73	73	74	76	72	74	76	58	75
ES	79	83	78	79	85	77	78	81	75	79	81	78	80	82	78	80	85	78
FI	82	(88)	(66)	83		(63)	83	(94)	(68)	83	(95)	70	84	(87)	78	85	88	74
FR	79	80	64	79	79	63	78	79	64	80	81	66	81	80	66	81	79	67
HR	71			71			72			74			75			75		
HU	77	(83)	(55)	78		(82)	78		(84)	82		(76)	83		(75)	84	82	65
IE	78	86	73	78	86	73	77	82	(72)	79	(85)	75	81	(88)	(80)	82	89	83

MS	2018			2019			2020			2021			2022			2023		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
IT	70	77	74	70	77	74	69	72	69	69	74	71	70	77	72	72	76	73
LT	83			84			84			84		89	84		(90)	84		93
LU	72	82	68	73	82	(72)	74	82	75	75	(84)	(81)	75	82	79	74	85	78
LV	84		73	84		(73)	85		76	82		(70)	83		(72)	84		76
MT	77	(93)	(82)	78	(90)	(82)	79	(96)	83	79	(93)	83	81	(93)	89	81	91	93
NL	83	80	62	83	82	65	84	82	62	85	84	64	86	87	68	87	88	68
PL	75		(81)	75		(88)	76		(85)	78			79		(88)	80		86
PT	81		84	81		85	80		84	81		(84)	82		88	83		86
RO	73			74			74			71			72			73		
SE	88	(87)	73	88	(85)	74	88	89	75	88	(92)	77	88	(91)	79	89	93	84
SI	80		(79)	80		(78)	79	(92)	(81)	80		(79)	81		(82)	80		83
SK	77			78			78			80			82			82		
EFTA	85	89	74	85	90	75	85	89	74	85	88	75	85	88	73	86	89	74
CH	87	90	76	87	90	76	87	90	76	87	89	74	87	88	73	87	89	74
IS	89			88			87			86	96		87	(100)		88	91	88
NO	82	91	70	82		(69)	82	(88)	(72)	83	(89)	(79)	83	(90)	(74)	83	87	74

Note: 'Nat.' denotes nationals; 'EU' denotes EU movers; 'TCN' denotes third-country nationals. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2024, custom extraction by Milieu

Table 34: Employment rate by nationality group and country of residence (%), 2018-2023

MS	2018			2019			2020			2021			2022			2023		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
EU-27	73	74	58	74	75	60	73	72	57	74	74	59	75	77	62	76	78	63
AT	78	77	61	78	77	61	77	76	57	77	75	61	79	79	64	79	79	62
BE	71	71	45	72	72	45	71	72	40	72	74	44	73	75	49	73	74	50
BG	72			75			73			73			76			76		
CY	75	(77)	(66)	76	(81)	(70)	75	78	68	76	(78)	71	78	85	71	79	84	74
CZ	80	(87)	(83)	80	(86)	(84)	80	(86)	(83)	80	(86)	(82)	81	(88)	(84)	82	85	84
DE	82	79	56	83	80	59	82	78	57	82	78	57	83	81	60	84	82	59
DK	79	76	59	80	(81)	(61)	79	(84)	62	80	(87)	(66)	81	(87)	71	81	80	71
EE	80		71	81		(75)	79		(74)	81		(71)	84		76	84		82
EL	60	55	57	62	52	58	62	56	54	63	56	57	67	57	61	68	49	63
ES	68	69	60	69	72	60	67	65	55	69	66	59	70	69	62	72	73	63
FI	77	(88)	(57)	78		(55)	77	(94)	(58)	78	(87)	60	79	(84)	68	80	79	62
FR	73	73	51	73	73	52	73	73	52	74	74	55	75	74	56	76	74	58
HR	65			67			67			68			70			71		
HU	75	(83)	(55)	75		(82)	75		(84)	79		(76)	80		(75)	81	82	65
IE	74	81	68	75	86	73	74	82	(70)	75	(81)	75	78	(88)	(80)	79	87	80

MS	2018			2019			2020			2021			2022			2023		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
IT	63	67	64	63	66	64	63	62	60	63	64	61	65	68	63	66	68	65
LT	78			78			77			78		89	79		(90)	79		93
LU	69	78	59	71	78	(66)	71	76	65	72	(81)	(76)	72	79	73	72	82	78
LV	79		70	79		(73)	78		(69)	77		(70)	78		(72)	78		76
MT	75	(93)	(79)	76	(90)	(77)	76	(94)	78	77	(92)	78	79	(93)	86	79	91	89
NL	80	78	56	81	80	59	81	80	55	83	80	56	84	85	62	84	85	61
PL	72		(81)	73		(88)	74		(85)	75			77		(88)	78		86
PT	76		79	76		78	75		75	76		(76)	78		78	78		76
RO	70			71			71			67			69			69		
SE	85	(84)	53	85	(83)	56	83	83	52	83	(89)	54	84	(89)	61	84	86	65
SI	76		(74)	77		(74)	76	(92)	(77)	76		(74)	78		(80)	77		80
SK	72			73			73			75			77			78		
EFTA	83	84	64	83	86	66	82	84	65	82	83	65	83	84	66	83	84	66
CH	84	85	65	84	86	66	84	85	67	84	83	64	84	83	65	85	85	66
IS	87			86			83			82	90		85	(97)		86	88	88
NO	80	89	62	80		(69)	80	(83)	(65)	81	(89)	(70)	82	(90)	(74)	81	83	68

Note: ‘Nat.’ denotes nationals; ‘EU’ denotes EU movers; ‘TCN’ denotes third-country nationals. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 35: Unemployment rate by nationality group and country of residence (%), 2018-2023

	2018			2019			2020			2021			2022			2023		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
EU-27	7	9	16	6	8	15	6	9	17	6	9	16	5	7	13	5	7	12
AT	4	6	13	3	6	12	4	8	15	5	9	15	3	7	11	3	7	13
BE	5	8	21	5	7	18	5	7	19	5	7	21	5	6	17	5	6	16
BG	5			4			5			5			4			4		
CY	8	(9)	(5)	7	(6)	(4)	7	9	8	7	(8)	10	6	5	10	6	5	10
CZ	2	(1)	(1)	2	(2)	(2)	3	(1)	(2)	3	(1)	(3)	2	(2)	(2)	2	3	3
DE	3	5	10	3	4	10	3	5	13	3	5	10	2	4	8	2	4	8
DK	4	10	11	4	(6)	(6)	5	(4)	11	4	(3)	(8)	4	(3)	10	4	9	9
EE	4		9	4		(6)	6		(8)	5		(9)	5		9	5		7
EL	19	24	26	17	24	27	16	24	29	14	23	23	12	21	18	11	16	15
ES	14	17	23	13	15	22	14	20	27	13	18	24	12	15	20	11	14	19
FI	6		14	6		(13)	7		(14)	7	(8)	15	6	(4)	12	6	10	17
FR	8	8	21	8	8	18	7	7	18	7	8	16	6	7	15	7	7	15
HR	8			6			7			7			7			6		
HU	4			3			4			4			3			4		
IE	5	6	7	4			5		(3)	5	(5)		4			3	3	3

	2018			2019			2020			2021			2022			2023		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
IT	10	13	14	9	14	13	9	13	13	9	13	14	7	12	12	7	11	11
LT	6			6			9			7			6			7		
LU	3	5	13	3	6	(8)	4	7	13	3	(3)	(6)	3	4	8	3	4	
LV	7		5	6			8		(10)	7			6			6		
MT	3		(3)	3		(6)	3	(3)	6	3	(1)	5	2		4	2		3
NL	3	3	10	3	3	9	3	3	10	3	5	11	3	2	8	3	4	10
PL	4			3			3			3			3			3		
PT	7		6	6		7	7		11	6		(10)	6		11	6		11
RO	4			4			5			5			5			5		
SE	4	(3)	28	4	(3)	25	6	7	31	6	(3)	30	5	(2)	23	5	8	23
SI	5		7	4		(5)	5		(6)	4		(6)	4		(3)	3		4
SK	6			6			7			6			6			6		
EFTA	3	6	14	3	5	12	3	6	12	3	6	13	3	5	10	3	5	11
CH	3	6	14	3	5	12	4	6	12	4	6	14	3	5	11	3	5	11
IS	2			3			4			5	6		2	3		2	3	
NO	2	3	11	2			3	(6)	(11)	3		(11)	2			2	5	7

Note: 'Nat.' denotes nationals; 'EU' denotes EU movers; 'TCN' denotes third-country nationals. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 36: Self-employed by nationality group, EU 2017-2023

	2017	2018	2019	2020	2021	2022	2023
Nationals (1 000s and %)							
Employee	147 517 (86%)	148 927 (86%)	149 886 (86%)	147 687 (86%)	149 574 (87%)	151 575 (86%)	152 317 (86%)
Self-employed with employees	7 507 (4%)	7 414 (4%)	7 413 (4%)	6 935 (4%)	7 334 (4%)	7 481 (4%)	7 394 (4%)
Self-employed without employees	16 844 (10%)	16 750 (10%)	16 765 (10%)	16 631 (10%)	15 884 (9%)	16 193 (9%)	16 421 (9%)
EU movers (1 000s and %)							
Employee	4 957 (90%)	5 245 (90%)	5 459 (90%)	5 011 (96%)	5 212 (92%)	5 634 (91%)	6 212 (92%)
Self-employed with employees	121 (2%)	138 (2%)	154 (3%)	28 (1%)	92 (2%)	119 (2%)	110 (2%)
Self-employed without employees	411 (7%)	437 (8%)	474 (8%)	189 (4%)	366 (6%)	441 (7%)	399 (6%)
Third-country nationals (1 000s and %)							
Employee	6 084 (90%)	6 544 (90%)	6 968 (90%)	6 836 (94%)	7 065 (91%)	8 099 (92%)	9 689 (92%)
Self-employed with employees	171 (3%)	206 (3%)	221 (3%)	120 (2%)	183 (2%)	213 (2%)	206 (2%)
Self-employed without employees	511 (8%)	501 (7%)	581 (7%)	325 (4%)	505 (7%)	533 (6%)	663 (6%)

Note: Percentages in brackets indicate the proportion of workers in each nationality category in that employment form. Low reliability for EU movers in 2020.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 37: Self-employment by sector and nationality group, EU 2023 (%)

	Nationals	EU movers	Third-country nationals
A: Agriculture	14		
C: Manufacturing	7	3	2
E: Water supply, sewerage, and sanitation	0,2		
F: Construction	12	34	18
G: Wholesale and retail trade	15	10	26
H: Transportation and storage	3		5
I: Accommodation and food services	5	12	17
J: Information and communication	4	6	3
K: Financial and insurance activities	2		
L: Real estate	2		
M: Professional	14	13	7
N: Administrative and support services	3	4	5
O: Public administration and defence	0,1		
P: Education	3	3	3
Q: Human health and social work	7	7	1
R: Arts	3	5	4
S: Other service activities	6	5	9
T: Activities of households as employers	0,3		

Note: Sectors without sufficient data are omitted from the table. The values indicate the share of self-employed workers of the nationality that are active in a specific sector.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 38: Proportion of self-employed by nationality group and country of residence, 2022-2023

	Nationals			EU movers			Third-country nationals		
	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)
EU-27	12	14	1	5	8	3	6	9	2
AT	14	10	-3	9	1	-8	8		
BE	10	13	4		9			5	
BG	14	10	-4	8					
CY	7	8	1	2	2	-0,2	5	4	-0,4
CZ	15	16	1	11	13	2	17	19	2
DE	7	7	-0,1	2	2	-0,2	1	1	0,5
DK	6	7	0,2						
EE	8	7	-0,5						
EL	14	28	13	19			12	11	-1
ES	10	15	5		16			12	
FI	11	9	-2						
FR	11	12	1		5			6	
HR	8	11	4						
HU	21	11	-10	9			12		
IE	11	9	-2						
IT	10	20	11		8			12	
LT	13	10	-2	5			2		
LU	16			12			1		
LV	18	10	-8						
MT	12	11	-0,5						
NL	11	16	5		9			2	
PL	11	18	7						
PT	13	11	-2					2	

	Nationals			EU movers			Third-country nationals		
	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)
RO	8	11	2	2					
SE	14	8	-6	9			10		
SI	11	12	0,3					4	
SK	2	13	11						
EFTA	27	8	-19		2		5		
CH	10	14	4		10			11	
IS	4	11	8	4					
NO	8	2	-6						

Note: The table indicates the proportion of all workers in the nationality group that are self-employed, either with or without employees. Figures of low reliability are indicated in brackets. Blank cells indicate where values are too small to publish.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 39: Permanent and fixed-term contracts by nationality group, EU 2018-2023

Nationality	Contract type	2018	2019	2020	2021	2022	2023
Nationals	**Fixed**	20 417 (14%)	19 625 (13%)	17 424 (12%)	18 287 (12%)	18 397 (12%)	17 451 (11%)
	Permanent	128 434 (86%)	130 185 (87%)	130 375 (88%)	131 153 (88%)	133 143 (88%)	134 793 (89%)
EU movers	**Fixed**	974 (19%)	939 (17%)	806 (16%)	858 (16%)	852 (15%)	843 (14%)
	Permanent	4 271 (81%)	4 525 (83%)	4 295 (84%)	4 371 (84%)	4 825 (85%)	5 050 (86%)
Third-country nationals	**Fixed**	1 839 (28%)	1 943 (28%)	1 799 (26%)	1 887 (27%)	2 055 (25%)	2 192 (24%)
	Permanent	4 704 (72%)	5 020 (72%)	5 118 (74%)	5 207 (73%)	6 056 (75%)	7 054 (76%)

Note: Percentages in brackets indicate the proportion of workers of each nationality in that employment form.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 40: Number of fixed-term contracts and share of all workers by nationality group in EU and EFTA countries, 2023

	Nationals (%)			EU movers (%)			Third-country nationals (%)		
	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)
EU-27	12	2257	2245	15	843	828	25	2257	2232
AT	6	35	29	8	42	33	10	35	25
BE	7	28	21	13	34	21	22	28	6
BG	4								
CY	7	28	22	5	4	-1	52	28	-23
CZ	6	19	14	10	6	-4	17	19	2
DE	10	656	646	14	307	294	22	656	633
DK	9	13	4	9	6	-3	17	13	-4
EE	2								
EL	9	26	17	17	2	-15	22	26	4
ES	20	457	437	18	91	73	34	457	423
FI	14	18	5	18	3	-15	32	18	-14
FR	14	286	272	18	88	70	26	286	260
HR	14								
HU	5								
IE	7	17						17	
IT	16	322	307	21	120	99	23	322	299
LT	2								
LU	6			7	5	-2	5		
LV	2								
MT	4	9	5				23	9	-14
NL	23	73	50	30	85	55	48	73	25
PL	15	84	69				43	84	41
PT	16	77	62				37	77	40
RO	2								
SE	11	62	51	16	14	-2	33	62	29
SI	10	11	1				18	11	-7

	Nationals (%)			EU movers (%)			Third-country nationals (%)		
	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)
SK	4								
EFTA	8	59	51	10	91	81	17	59	42
CH	9	40	31	11	77	66	15	40	25
IS	12	1	-11	7	1	-6	18	1	-18
NO	6	18	11				19	18	-1

Note: The table shows the proportion of all workers of that nationality that held fixed-term contracts in the given year. Brackets indicate figures of low reliability.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 41: Part-time contracts by nationality group, EU 2018-2023

Nationality	Contract type	2018	2019	2020	2021	2022	2023
Nationals	**Full-time**	144 866 (83%)	145 571 (83%)	143 623 (83%)	145 125 (83%)	147 399 (84%)	147 777 (83%)
	Part-time	30 090 (17%)	30 253 (17%)	29 782 (17%)	29 015 (17%)	29 072 (16%)	29 479 (17%)
EU movers	**Full-time**	4 620 (78%)	4 818 (78%)	4 554 (78%)	4 666 (79%)	5 088 (79%)	5 253 (79%)
	Part-time	1 328 (22%)	1 382 (22%)	1 259 (22%)	1 277 (21%)	1 371 (21%)	1 392 (21%)
Third-country nationals	**Full-time**	5 446 (74%)	5 869 (74%)	5 889 (75%)	6 119 (76%)	7 001 (77%)	8 230 (78%)
	Part-time	1 944 (26%)	2 022 (26%)	1 934 (25%)	1 905 (24%)	2 091 (23%)	2 385 (22%)

Note: Percentages in brackets indicate the proportion of workers in each nationality category in that employment form.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 42: Share of part-time contracts by nationality group, 2022-2023

	Nationals			EU movers			Third-country nationals		
	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)
EU-27	16	17	0,2	21	21	-0,3	23	22	-1
AT	30	31	0,5	30	29	-1	27	29	2
BE	23	23	-0,2	22	22	-0,2	23	23	-0,1
BG	1	1	-0,1			0,0			
CY	9	7	-1	7	7	0,0	7	9	2
CZ	6	7	1	5	8	3	5	6	1
DE	28	29	1	24	24	-0,4	29	29	0,4
DK	21	22	1	19	17	-2	21	21	0,1
EE	12	13	1				14	4	-10
EL	8	7	-1		12	12	13	13	-1
ES	13	12	-0,4	12	13	1	18	18	0,1
FI	15	15	-0,3	11	13	2	18	14	-4
FR	16	16	0,0	22	21	-1	22	23	1
HR	5	4	-1						
HU	4	4	-0,2						
IE	18	19	0,3	12	11	-1	12	16	4
IT	17	17	-0,2	22	22	-0,2	25	24	-1
LT	5	6	0,2			0,0			
LU	21	22	0,3	14	12	-2	13		
LV	6	6	0,3						
MT	11	11	0,1	(4)	7	2		5	
NL	39	40	0,4	27	26	-0,2	31	30	-1
PL	5	5	0,3						
PT	6	7	0,4				(7)	9	1
RO	3	3	0,0						
SE	18	18	-0,2	17	14	-3	20	21	0,2
SI	8	8	0,0				(4)	4	-1

	Nationals			EU movers			Third-country nationals		
	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)	2022	2023	Diff. (Pps)
SK	3	3	0,2						
EFTA	33	33	0,2	25	25	0,3	35	33	-2
CH	42	43	1	27	27		36	35	-1
IS	20	18	-2		5			9	
NO	21	21	-0,4	13	16	3	30	29	-1

Note: The table shows the proportion of all workers of that nationality that held part-time contracts in the given year. Brackets indicate figures of low reliability.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 43: Employment rate of male and female EU movers, 2018-2023

	Male			Female		
Country	**2018**	**2023**	**Diff (pps)**	**2018**	**2023**	**Diff (pps)**
EU-27	83	85	2	66	71	5
AT	84	83	0	71	75	4
BE	77	79	2	63	68	5
CY	85	(87)	2	70	82	12
CZ				(77)	(74)	-3
DE	87	88	1	68	74	6
DK	(85)	(84)	-1	(72)	(79)	6
EL				50	(38)	-13
ES	76	80	3	61	66	5
FI						
FR	78	78	0	67	70	3
IE						
IT	79	83	4	60	58	-2
LU	81	84	3	72	81	8
MT						
NL	90	89	-1	73	81	8
SE	88	(92)	3	77	(90)	13
EFTA	88	87	-1	77	81	4
CH	89	87	-1	77	82	4
IS						
NO						

Note: Unreliable estimates are highlighted in brackets. Countries without values for either year are omitted.

Source: EU-LFS 2024, custom extraction by Milieu.

Table 44: Part-time employment and fixed-term contracts by nationality group and gender (%), 2023

MS	Part-time employment				Fixed-term contracts			
	EU movers		Nationals		EU movers		Nationals	
	Female	Male	Female	Male	Female	Male	Female	Male
EU-27	36	8	27	7	16	13	12	10
AT	45	14	51	12	10	9	6	5
BE	36	8	37	10	14	7	8	6
BG			1	1			3	3
CY	9	8	8	5	9	8	8	5
CZ	14	6	8	5	14	6	8	5
DE	16	12	9	9	16	12	9	9
DK	8	8	10	7	8	8	10	7
EE			2	2			2	2
EL	36		12	8	36		12	8
ES	14	12	19	14	14	12	19	14
FI	13		15	11	13		15	11
FR	19	16	14	12	19	16	14	12
HR			12	9			12	9
HU			5	5			5	5
IE			7	6			7	6
IT	20	19	17	13	20	19	17	13
LT			2	2			2	2
LU	5	4	5	5	5	4	5	5
LV			2	2			2	2
MT			6	4			6	4
NL	31	29	25	21	31	29	25	21
PL			16	13			16	13
PT			16	15			16	15
RO			1	3			1	3
SE	14		12	10	14		12	10
SI			11	8			11	8

MS	Part-time employment				Fixed-term contracts			
	EU movers		Nationals		EU movers		Nationals	
	Female	Male	Female	Male	Female	Male	Female	Male
SK			4	3			4	3
EFTA	11	8	8	7	11	8	8	7
CH	12	10	9	8	12	10	9	8
IS	8		13	7	8		13	7
NO			7	5			7	5

Note: The table shows the proportion of all workers of that nationality group and gender that held part-time or fixed-term contracts in the given year. Brackets indicate figures of low reliability.

Source: EU-LFS 2024, custom extraction by Milieu

Table 45: Share of EU movers by educational attainment, 2023

	Low (ISCED 0-2)			Medium (ISCED 3-4)			High (ISCED 5-8)		
Country	**2018**	**2023**	**Diff (pps)**	**2018**	**2023**	**Diff (pps)**	**2018**	**2023**	**Diff (pps)**
EU-27	28	30	2	42	38	-4	29	32	3
AT	12	13	1	49	46	-4	39	41	2
BE	25	23	-2	32	31	0	44	46	3
CY	20	19	-1	46	45	-1	34	36	2
CZ	9	9	0	59	46	-13	32	46	13
DE	30	38	8	45	37	-9	25	26	1
DK	5	9	4	35	36	1	61	56	-5
EL	28	26	-2	52	64	12	20	10	-10
ES	30	35	5	38	34	-4	31	31	0
FI	31	26	-5	47	47	-1	22	28	6
FR	40	34	-6	30	30	0	29	36	7
IT	36	29	-7	52	57	6	12	13	1
LU	22	21	0	27	20	-6	52	59	7
MT	24	14	-9	32	40	8	45	46	1
NL	19	32	13	44	23	-21	36	45	8
SE	17	15	-2	22	17	-5	60	68	8
EFTA	19	20	1	36	31	-5	45	49	3
CH	21	22	1	32	28	-4	47	51	3
NO	6	12	6	54	46	-8	40	42	3

Note: 'Low' educational attainment refers to ISCED levels 0-2 (early childhood, primary and lower secondary education); 'medium' refers to ISCED levels 3-4 (upper secondary and post-secondary non-tertiary education); and 'high' refers to ISCED levels 5-8 (short-cycle tertiary education and tertiary education at Bachelor, Master's, or Doctoral level). Only countries where comparison was possible between at least two categories are included in the table. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2024, custom extraction by Milieu.

B.3: Mobility of healthcare workers

Table 46: EU movers health workers by three-digit ISCO classification, 2023, 1000s

MS	Medical Doctors	Nurse/Midwife	Nurse/Midwife Associate	Other Health Associate	Personal Care Worker
AT	4	5	0	0	12
BE	0	2	3	0	2
CH	15	22	2	8	12
CY	1	0		0	0
CZ	2	1		1	1
DE	0	0	68	29	44
EFTA	17	27	0	5	18
ES	4	4		1	16
EU-27	48	18	92	46	189
FR	8	0	0	0	9
IT	0		9	2	80
LU	1	0	1	0	0
NL	2	0	0	5	5
SE	4	0		0	0

Source: EU-LFS 2024, custom extraction by Milieu

Table 47: EU movers and national health workers, by gender, 2018 and 2023, 1000s

MS	EU movers				Nationals			
	2018		2023		2018		2023	
	Female	Male	Female	Male	Female	Male	Female	Male
AT	8	0	0	16	186	54	177	54
BE	3	0	16	0	231	36	216	40
CH	39	15	8	0	186	34	194	37
CY	0	0	44	15	5	3	6	3
CZ	1	0	0	1	207	38	206	45
DE	107	14	3	1	2115	507	2159	510
EFTA	43	7	108	0	399	75	423	85
ES	15	1	42	6	773	179	914	236
EU-27	318	30	22	1	8520	2116	9048	2322
FR	0	0	338	13	1223	287	1339	339
IT	119	0	9	0	902	381	945	364
LU	1	0	90	3	3	0	4	0
NL	0	0	1	0	507	99	545	122
SE	6	2	6	0	393	87	364	102

Source: EU-LFS 2024, custom extraction by Milieu

Table 48: EU movers health workers, by age group, 2018 and 2023, 1000s

MS	20 - 24 years		25 - 29 years		30 - 34 years		35 - 39 years		40 - 44 years		45 - 49 years		50 - 54 years		55 - 59 years		60 - 64 years	
	2018	*2023*	*2018*	*2023*	*2018*	*2023*	*2018*	*2023*	*2018*	*2023*	*2018*	*2023*	*2018*	*2023*	*2018*	*2023*	*2018*	*2023*
AT																		
BE																		
CH			(2)	(4)	9	7	9	6	(3)	6	(3)	(4)	(4)	(5)	(3)	(3)		(1)
CY																		
CZ				(1)	(1)													
DE			(8)		(8)				(11)		(5)							
ES	(1)				(3)		(2)	(4)	(1)	(2)	(2)	6	(2)	(4)		(2)	(1)	(2)
EU-27			18		29		26		43	16	39	42	36	26	24	22	13	15
FR																		
IT			(3)	4	7	4	8	6	20	11	22	16	21	20	19	16	13	13
LU																		
NL																		
SE																		

Note: Values in parentheses indicate low reliability

Source: EU-LFS 2024, custom extraction by Milieu

Table 49: EU movers and national health workers, by full-time vs. part-time, 2018 and 2023, (%)

MS	EU movers				Nationals			
	2018		2023		2018		2023	
	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time
AT	(100%)	(0%)	46%	54%	58%	42%	49%	51%
BE	(0%)	(100%)	(0%)	(100%)	52%	48%	57%	43%
CH	56%	44%	57%	43%	35%	65%	38%	62%
CY			100%	0%	100%	0%	100%	0%
CZ	(100%)	(0%)	(100%)	(0%)	90%	10%	92%	8%
DE	71%	29%	83%	17%	58%	42%	55%	45%
EFTA	56%	44%	55%	45%	43%	57%	49%	51%
ES	72%	28%	94%	6%	85%	15%	87%	13%
EU-27	75%	25%	77%	23%	71%	29%	72%	28%
FR			100%	0%	76%	24%	76%	24%
IT	79%	21%	76%	24%	76%	24%	77%	23%
LU	(100%)	(0%)			60%	40%	68%	32%
NL			61%	39%	23%	77%	37%	63%
SE	66%	34%	100%	0%	56%	44%	64%	36%

Note: Values in parentheses indicate low reliability

Source: EU-LFS 2024, custom extraction by Milieu

Table 50: EU movers and national health workers, by education, 2018 and 2023, 1000s

MS	2018						2023					
	High (ISCED 5-8)		Low (ISCED 0-2)		Medium (ISCED 3-4)		High (ISCED 5-8)		Low (ISCED 0-2)		Medium (ISCED 3-4)	
	EU movers	Nationals	EU movers	Nationals	EU movers	Nationals	EU movers	Nationals	EU movers	Nationals	EU movers	Nationals
AT	0	70	0	14	0	153	4	79	0	13	8	143
BE	0	167	0	10	(2)	91	(4)	169	0	5	(3)	83
CH	32	98	(3)	8	18	112	39	112	(4)	10	15	107
CY		6				(1)	(1)	9				(1)
CZ	(1)	83		10		152	(3)	85		11		154
DE	30	445		169	82	2000		507		256	57	1897
EFTA	30	241		21	15	204	38	268		26	5	210
ES	6	592	(4)	123	6	238	11	704	(4)	136	11	311
EU-27	115	4494	53	835	168	5277	106	5084	51	949	174	5330
FR	6	871		46		590	(8)	996		61	(6)	618
IT	24	660	38	191	59	428	13	682	25	177	52	448
LU		(1)			(1)	3	(1)	2				3
NL		234		54		311	(2)	288		66	4	312
SE	(3)	209		47		219	(4)	233		36		194

Note: values in parentheses indicate low reliability , *Source*: EU-LFS 2024, custom extraction by Milieu

Table 51: EU movers and national health workers, by contract type, 2018 and 2023, 1 000s

MS	EU movers				Nationals			
	2018		2023		2018		2023	
	Permanent contract	Fixed term contract	Permanent contract	Fixed term contract	Permanent contract	Fixed term contract	Permanent contract	Fixed term contract
AT	7		16		201	21	201	11
BE	(3)		10		220	11	210	8
CH	45	(4)	47	(5)	177	21	181	21
CY			(1)		7	(1)	8	
CZ	(1)		(2)		192	15	200	11
DE	94	(15)	96		2150	300	2300	222
EFTA	48		45	(5)	409	41	439	33
ES	12	(4)	19	(2)	646	291	770	357
EU-27	285	47	317	(13)	8270	1453	9053	1421
FR			(8)		1063	241	1276	178
IT	107	8	80	5	971	134	1020	140
LU	(1)		(1)		3		5	
NL			(2)		475	71	462	126
SE	7	(2)	(4)		395	77	393	66

Note: Values in parentheses indicate low reliability

Source: EU-LFS 2024, custom extraction by Milieu

Table 52: Health workers - returnees– all medical professions, 2023, 1000s

MS	Number of returnees
AT	(3)
BE	(2)
CH	8
CY	(2)
CZ	4
DE	35
DK	(4)
EFTA	11
EL	(2)
ES	33
EU-27	235
FI	(3)
FR	27
IE	
IT	6
NL	12
NO	9
PT	4
SE	38

Note: Returnees are defined as nationals who have been in the country for less than 10 years ; values in parentheses indicate low reliability

Source: EU-LFS 2024, custom extraction by Milieu

Table 53: Health workers – returnees, by gender, 2018 and 2023, 1000s

MS	Female		Male	
	2018	2023	2018	2023
AT				
BE		(2)		
CH		6		
CY		(1)		0
CZ		(2)		(1)
DE		(12)		
DK		(2)		
EFTA	(5)	(7)		
EL				(1)
ES	11	25	(3)	6
EU-27	41	163	18	51
FI				
FR		14		(5)
IE				
IT	4	5		
NL		5		
NO		(6)		
PT		(3)		
SE	18	25	(5)	10

Note: Returnees are defined as nationals who have been in the country for less than 10 years; values in parentheses indicate low reliability

Source: EU-LFS 2024, custom extraction by Milieu

Table 54: Health workers – returnees, by full-time vs. part-time, 2018 and 2023, (%)

MS	2018		2023	
	Full-time	Part-time	Full-time	Part-time
AT				
BE				
CH			(33)	(67)
CY			(100)	(0)
CZ			(100)	(0)
DE			(100)	(0)
DK				
EFTA	(0)	(100)	(0)	(100)
EL			(100)	0
ES	85	15	87	13
EU-27	66	34	85	15
FI				
FR			(100)	(0)
IE				
IT	(100)	(0)	(69)	(31)
NL	(0)	(100)	(38)	(62)
NO			(0)	(100)
PT			(100)	(0)
SE	(52)	(48)	(65)	(35)

Note: Returnees are defined as nationals who have been in the country for less than 10 years; Values in parentheses indicate low reliability

Source: EU-LFS 2024, custom extraction by Milieu

Table 55: Health workers – returnees, by education, 2018 and 2023, 1000s

MS	High (ISCED 5-8)		Low (ISCED 0-2)		Medium (ISCED 3-4)	
	2018	2023	2018	2023	2018	2023
AT	0	3	0	0	0	0
BE	0	0	0	0	0	0
CH	0	5	0	0	0	1
CY		1				0
CZ	0	2	0			1
DE	6	18	0	0	0	13
DK	0	2		0	0	0
EFTA	0	0	0	0	0	7
EL		2				
ES	9	24	3	3	2	4
EU-27	28	136	12	16	19	74
FI	0	0	0	0	0	0
FR	0	17	0	0	0	6
IE	0	0		0	0	0
IT	0	2	2	0	0	2
NL	0	2	0	0	0	3
NO	0	0	0	0	0	6
PT	0	0	0	0		0
SE	6	16	6	6	9	15

Note: Returnees are defined as nationals who have been in the country for less than 10 years

Source: EU-LFS 2024, custom extraction by Milieu

Table 56: Health workers – returnees, by contract type, 2018 and 2023, 1000s s

MS	Fixed-term job		Permanent job	
	2018	2023	2018	2023
AT	0	0	0	0
BE	0	0	0	0
CH	0	1	0	6
CY		0		1
CZ		0	0	2
DE	0	0	0	13
DK	0	0	0	0
EFTA	0	0	7	9
EL		0		0
ES	4	13	10	18
EU-27	15	48	36	157
FI	0	0	0	0
FR	0	7	0	14
IE	0	0	0	0
IT	0	0	3	3
NL	0	2	0	3
NO	0	0	6	7
PT	0	0	0	3
SE	9	11	12	26

Note: Returnees are defined as nationals who have been in the country for less than 10 years

Source: EU-LFS 2024, custom extraction by Milieu

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