



Annual report on intra-EU labour mobility

2023

EUROPEAN COMMISSION

Directorate-General for Employment, Social Affairs and Inclusion
Directorate E — Labour Mobility and International Affairs
Unit E.1 — Labour Mobility, Public Employment Services, ELA

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Annual Report on Intra-EU Labour Mobility 2023



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Manuscript completed in November 2023.

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PDF ISBN 978-92-68-12031-6 ISSN 2529-3281 doi: 10.2767/388182 KE-BQ-24-001-EN-N

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Country codes¹

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

CAGR	Compound annual growth rate
CPI	Comparative Price Index
EFTA	European Free Trade Association, consisting of Iceland, Liechtenstein, Norway, and Switzerland ²
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-28	The European Union in its previous composition of 28 Member States, prior to the withdrawal of the United Kingdom on 31 January 2020
EU-LFS	EU Labour Force Survey ³
EURES	European Employment Services, a cooperation network of public employment services, other employment services, trade unions, and employers' organisations
ISCO	The international standard classification of occupations ⁴
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

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 (2022b), *European Union Labour Force Survey (EU-LFS)* [Online]. Available online: <https://ec.europa.eu/eurostat/web/microdata/european-union-labour-force-survey> [Accessed 15 September 2022].

⁴ International Labour Organization (ILO) (2022), *The International Standard Classification of Occupations-ISCO-08* [Online]. Available online: <https://isco-ilo.netlify.app/en/isco-08/> [Accessed 12 December 2022].

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 ⁵ .
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 ⁶ .
Circular mobility	Circular mobility is exercised by a person repeatedly changing residence between two or more countries (e.g. moving from Portugal to Belgium and back to Portugal – or Spain or any other MS). 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 ⁷ , 'usual residence' means the place at which a person normally spends the daily period of rest (...) or, by default, the place of legal or registered residence. In this report, persons are counted as residents of a certain country if they have resided there for at least 12 months or intend to do so. This is in line with measurement, as the EU-LFS ⁸ and the Eurostat migration statistics only capture persons who stay, or intend to stay, in a country for one year or more.
Cross-border worker	For the purposes of this study, cross-border workers are defined as EU or EFTA citizens who live in one EU or EFTA country and work in another, either as employees or self-employed. Cross-border workers therefore move across borders more or less regularly ⁹ . Cross-border workers may include the legally defined groups of seasonal ¹⁰ and frontier workers ¹¹ and may also include some posted

⁵ Eurostat (2021), 'EU Labour Force Survey Database User Guide (data up to reference year 2020)', Eurostat, Luxembourg, p. 55.

⁶ Swiss Confederation Central Compensation Office (CCO) (2022), *Agreement on the Free Movement of Persons - EU* [Online]. Available online: https://www.zas.admin.ch/zas/en/home/bases-legales-et-coordination-internationale/coordination_internationale_securite_sociale/accord_libre_circulation_ue.html [Accessed 15 September 2022].

⁷ 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

⁸ Eurostat (2018), 'EU Labour Force Survey Explanatory Notes (to be applied from 2017Q1 onwards)', Eurostat, Luxembourg.

⁹ The frequency of commuting cannot be identified in the EU-LFS, which is the data source for the estimation of numbers of cross-border workers.

¹⁰ 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 to 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.

¹¹ 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.

	workers as specified in Regulation (EC) 883/2004 ¹² . However, the data include all persons who live in one country and work in another. To align with the other parts of the study, data presented here look only at cross-border workers of EU or EFTA nationality. They can be EU and EFTA movers – meaning they live in a different Member State than their country of citizenship – and cross-border workers at the same time (e.g. where a French person lives in Belgium and works in Luxembourg).
Eastern European countries	Bulgaria, Czechia, Croatia, Hungary, Poland, Romania, Slovakia, Slovenia (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, as per the definition of the International Labour Organization (ILO) ¹³ . Operationally, the concept is measured through specific surveys such as the EU-LFS. In the EU-LFS, a person is defined as employed if, in a reference week, they worked for at least one hour or had a job or business but were temporarily absent. The concept includes dependent and self-employed workers.
Employment rate	The percentage of employed persons, over the total population in the same reference group
EU and EFTA movers	EU or EFTA citizens who reside in an EU or EFTA country other than their country of citizenship (definition created for the purposes of the study).
Foreigner	Any person who is not a citizen of the country in which they reside. This term is used here to refer to both EU and EFTA movers and third-country nationals.
Frontier worker	Frontier workers are a subset of cross-border workers. They are cross-border workers who specifically return to their country of residence <i>daily or at least weekly</i> , and who reside in a border region.
Inflows	The total number of persons who establish their usual residence ¹⁴ 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 ¹⁵ .
Inflow rate	The percentage of inflows of a certain group of people over the population in the same reference group residing in the country of destination ¹⁶ .
Inactive	Any person who is neither employed nor unemployed according to the ILO definition (see above and below); this group of inactive typically includes people in retirement or early retirement, pupils/students/people in training, homemakers, those in compulsory military service, those with permanent disabilities ¹⁷ .
International Standard Classification of Occupations (ISCO)	A hierarchically structured categorisation that allows for the division of all jobs in the world into 436 unit groups (ISCO-4D). These groups, which form the most detailed level of the categorisation structure, are combined into 10 major groups (ISCO-1D), 43 sub-major groups (ISCO-2D), and 130 minor groups (ISCO-3D)

¹² Regulation No 883/2004. Further explanations on the legislative framework can be found in the specific report on posting: De Wispelaere, et al. (2021a), 'Posting of workers: Report on A1 Portable Documents issued in 2020', European Commission (DG EMPL), Brussels.

¹³ International Labor Organization (ILO) (2022), *Concepts and definitions* [Online]. Available online: <https://ilostat.ilo.org/resources/concepts-and-definitions/> [Accessed 15 September 2022].

¹⁴ 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'.

¹⁵ 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.

¹⁶ Inflow rates of EU movers are calculated as inflows of nationals over the total number of nationals residing in the country; total inflow rates are calculated as all inflows over the total population residing in the country.

¹⁷ This list corresponds to different categories of inactive persons, as differentiated in the EU-LFS for the MAINSTAT variable, see: Eurostat (2021).

	based on their similarity of skill level and specialisation needed for the jobs. This report largely utilises ISCO-1D and ISCO-2D categorisations. ¹⁸
Length of stay	Years that movers have resided in the current country of residence.
Mobile worker	Active EU citizen who resides in a Member State or EFTA country other than their country of citizenship.
Mobility	EU or EFTA citizens moving their habitual residence to another Member State 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, Norway and Sweden (definition created for the purposes of this study).
Outflows	The total number of persons in the reference year who cease to have their usual residence ¹⁹ in a Member State for a period that is, or is expected to be, at least 12 months ²⁰ .
Outflow rate	The percentage of outflows of a certain group of people over the population in the same reference group ²¹ residing in the country of origin ²² .
Posted worker	Posted workers for the purpose of this report includes persons covered under Articles 12 and 13 of Regulation (EC) No 883/2004 on the coordination of social security systems. It includes: the persons who are employed by an employer that normally carries out its activities in a Member State and who are posted by that employer to another Member State to perform work on its behalf (Art.12); the persons who normally pursue an activity as a self-employed person in a Member State who go to pursue a similar activity in another Member State (Art.12); and such persons who pursue an activity as an employed/self-employed person in two or more Member States (Art.13) ²³ . While the last group are strictly speaking not considered as 'posted workers', in some cases the persons covered by Art.13 might also be posted under the conditions of the Posting of Workers Directive and their numbers are also estimated through PD A1 documents. Therefore, this group is included in the Commission's annual report on posting of workers and in the figure in Table 1 in this report; a separate figure only for the group of persons to which Art. 12 applies is provided in a footnote.
Recent movers	Movers who have resided in their country of residence for less than 2 years.

¹⁸ International Labour Organization (ILO) (2022), *The International Standard Classification of Occupations-ISCO-08* [Online]. Available online: <https://isco-ilo.netlify.app/en/isco-08/> [Accessed 12 December 2022].

¹⁹ 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'.

²⁰ 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.

²¹ Outflow rates of nationals are calculated as outflows of nationals over the total number of nationals residing in the country; total outflow rates are calculated as all outflows over the total population residing in the country.

²² Regulation (EC) No 862/2007.

²³ For further information on the legislative background, see De Wispelaere, et al. (2021a).

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 long-term stay abroad (at least one year).
Self-employed	In this report, the number of self-employed nationals and EU movers is measured with data from the EU-LFS. Here, self-employed are defined as persons who work in their own business, professional practice or farm for the purpose of earning a profit and who employ other persons or not ²⁴ .
Stock	Refers to the number of a certain group of persons (e.g. EU-27 movers) on a given date in a defined geographical area, as indicated by official statistics.
Unemployed	Any person who is not currently employed but who is available for work within two weeks and is actively seeking work (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.

²⁴ Eurostat (2018).

Executive summary

This annual report presents the latest findings on intra-EU labour mobility, offering updated insights into the trends observed in EU and EFTA countries using data from 2021 and 2022. The analysis encompasses the mobility of all working-age EU citizens (aged 20-64). In Chapter 2, the report delves into the movement and characteristics of the mobile population in the EU and EFTA. Chapter 3 expands on the labour market participation and integration of EU movers. Lastly, in Chapter 4 the intra-EU mobility of seniors and retired movers is analysed, also exploring the relationship between intra-EU mobility and exports of pensions.

1 Recent developments on the mobile working-age population

Overall, the **number of working-age EU movers** remained **relatively steady** over the last five years, being **at around 9.9 million**²⁵ in 2022 out of the total number of 13.7 million movers of all ages. Despite a 7% rise of both the number of working-age EU movers entering and leaving EU and EFTA countries in 2021, mobility has not yet returned to the pre-pandemic levels of 2019.

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

The main countries of origin and destination of EU movers have been consistent over the years. Romanians continue to lead, constituting 25% of all EU movers, followed by Polish nationals at 12%, and Italians at 10%²⁶. In terms of destination: just over 33% of working-age EU movers (3.4 million individuals) live in Germany, solidifying its status as the top destination for EU movers in 2022. Luxembourg stood out with the highest share of EU movers relative to its total population (41%).

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

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

²⁵ This estimate is based on Eurostat population statistics. According to EU-LFS data, which is differently sampled, there are just over 8 million EU movers. For a more extensive discussion of these data sources, see Annex B.

²⁶ Note that these estimates are based on EU-LFS data, as the required detailed is not available in Eurostat population statistics.

²⁷ 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 2.4.2.

2 Recent developments in the labour market integration of mobile workers

In 2022, both activity (83%) and employment (77%) rates of EU movers experienced a significant increase, surpassing 2019 levels. EU movers have thus been relatively more successful in securing employment opportunities compared to nationals (75% employment rate) and third-country nationals (69%). The highest employment rates of EU movers were found in Cyprus, the Netherlands (both at 85%), Switzerland (83%) and Germany (81%), while the lowest were found in Greece (57%) and Italy (61%) in 2022²⁸.

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

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

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

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

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

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

3 Cross-border pensions

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

²⁸ Member States where the estimates are of low reliability are omitted from this summary.

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

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

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

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

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

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

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

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

1 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 from the years 2021 and 2022. In doing so it delivers on Article 29 of Regulation (EU) 2016/589²⁹, namely to monitor and make public labour mobility flows and patterns in the Union.

The phenomenon of **labour mobility** within the EU and EFTA has gained increasing significance, as it profoundly **impacts the dynamics of both national and regional labour markets, while also contributing 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. This understanding is crucial as it directly influences aspects such as employment rates, skill utilisation, job matching, and overall economic growth.

In the first two chapters of this report focuses on the mobility of working-age EU citizens, ranging from 20 to 64 years old, and delves deeper into the specific characteristics and dynamics of those who actively participate in the labour market, encompassing both the employed and unemployed. The third chapter is dedicated to intra-EU mobility of seniors and retired movers, also exploring the relationship between intra-EU mobility and exports of pensions.

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)³⁰. In 1993, the Maastricht Treaty gave new life to the EU rules on free movement of persons, enshrining the Article 20 right of EU citizenship, while Article 21 gave all EU citizens and their family members the right (in principle) to move and reside freely within the EU. These provisions must be viewed in the context of the general principle of non-discrimination based on nationality enshrined in Article 18 of the TFEU and in Article 21(2) of the Charter of Fundamental Rights of the European Union.

Secondary legislation set out more detailed rules to regulate free movement, through Directive (EC) No 2004/38 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States³¹. 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 States³². Inactive EU citizens have the right to reside in another Member State for more than three months if they have sufficient resources and

²⁹ Regulation (EU) 2016/589 on a European network of employment services (EURES), workers' access to mobility services and the further integration of labour markets.

³⁰ Regulation (EU) No 492/2011 on freedom of movement for workers within the Union.

³¹ 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.

³² Ibid.

comprehensive sickness insurance cover³³. 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 EFTA³⁴, as a result of the Agreement creating the European Economic Area (EEA) and the Agreement on the Free Movement of Persons (AFMP) with the Swiss Federation³⁵.

Structure of the report

The report is structured as follows. Building mainly on the population statistics, chapter 2 focuses on the annual flows of EU movers in the EU and EFTA countries throughout 2021 and the total amount of movers that are resident in EU and EFTA countries at the beginning of 2022. Comparison is made between countries in 2021 (or the most recently available year), and on an EU aggregate level since 2017. 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 3 focuses on the labour market integration of mobile workers, thereby making use of 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 work³⁶.

Chapter 4 investigates the relationship between the steady increase in intra-EU mobility of working-age people and the mobility of retirement age EU citizens, over the past several years. It first assesses whether the growth trends of the former group have been followed by a corresponding increase in the latter. The chapter then narrows its focus to three key groups, retired returnees, mobile pensioners, and retired-cross border workers in order to gain a better understanding of mobility at a higher age.

This report adheres to the methodology employed in previous annual reports, featuring a familiar approach to examining the mobility of citizens and workers within the EU/EFTA. Chapters 2 and 3 provide an overview of general trends in this regard, while Chapter 4 offers a focused thematic analysis that explores specific aspects of intra-EU mobility.

The following topics have been addressed in previous editions of the mobility report:

- Cross-border workers; occupational mobility (2022)³⁷.
- The impact of the COVID-19 pandemic on mobility; return mobility (2021)³⁸.

³³ 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.

³⁴ EFTA countries included in this report are Iceland, Norway, and Switzerland. Liechtenstein was excluded as no data are available from the EU-LFS.

³⁵ 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.

³⁶ Note that these two indicators were first included in the 2022 report, and were not previously analysed in the annual updates.

³⁷ Hassan, et al. (2022), '2022 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

³⁸ Fries-Tersch, et al. (2022), '2021 Annual Report on Intra-EU Labour Mobility', European Commission (DG EMPL), Brussels.

- Mobility of high-skilled workers; impact of demographic change (2020)³⁹.
- Mobility spells – analysis of length of stays abroad of EU movers (2019)⁴⁰.
- Qualifications of EU-28 movers; household composition of EU-28 movers (2018)⁴¹.
- The gender dimension of mobility; language and other obstacles and drivers of mobility; mobility of health professionals (2017)⁴².
- Mobility of pensioners; return mobility (2016)⁴³.
- Cross-border workers (2015)⁴⁴.
- Mobility of young and highly educated people (2014).

Overview of key indicators and data sources

Definitions of specific concepts and terms are provided in the preamble to this report. However, a few customary terms are worth reiterating, and are applied throughout this report, as follows:

- **EU:** Unless otherwise specified, any mention of ‘the EU’ refers to the current composition of the European Union in 27 Member States, in place at the time of writing. This also applies to mentions of ‘EU movers’. If a data point refers to the EU-28, i.e. including the UK, this is mentioned explicitly.
- **EU movers, EU and EFTA movers:** EU movers refers 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. The main exception is Chapter 4 which focuses on retired individuals aged 60 and older.

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

Long-term labour mobility, where persons move their residence to a country of which they are not a citizen, *for at least one year*⁴⁵, 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 years⁴⁶. Developments in the long-term mobility of all movers, those of working age, and active movers (or workers) are presented in Table 1, under points 1 and 2, which compares data from two sources –

³⁹ Fries-Tersch, et al. (2020b), ‘2020 Annual Report on Intra-EU Labour Mobility’, European Commission (DG EMPL), Brussels.

⁴⁰ Fries-Tersch, et al. (2020a), ‘2019 Annual Report on Intra-EU Labour Mobility’, European Commission (DG EMPL), Brussels.

⁴¹ Fries-Tersch, et al. (2018a), ‘2018 Annual report on intra-EU labour mobility’, European Commission (DG EMPL), Brussels.

⁴² Fries-Tersch, et al. (2018b), ‘2017 annual report on intra-EU labour mobility’, European Commission (DG EMPL), Brussels.

⁴³ Fries-Tersch, et al. (2017).

⁴⁴ Fries-Tersch and Mabilia (2015), ‘2015 Annual Report on Intra-EU Labour Mobility’, European Commission (DG EMPL), Brussels.

⁴⁵ 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.

⁴⁶ Directive 2004/38/EC.

Eurostat population statistics and the EU Labour Force Survey (EU-LFS). These estimates are published together, however, they are not fully comparable, and represent different ways of measuring labour mobility⁴⁷.

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

Posting of workers, where a person that normally carries out its 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 – those who normally pursue an activity as self-employed in a certain Member State and who go to pursue a similar activity in another Member State. The data reported in Table 1 below also include persons who pursue an activity as an employed/self-employed person in two or more Member States⁴⁸.

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 their national social security institution 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 is analysed in a separate report⁴⁹ and key figures are shown in Table 1, point 4.

Return mobility, where long-term movers return to their country of origin. As there is 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, the European Labour Force Survey (EU-LFS), and administrative data on cross-border pensions collected until May 2023⁵⁰. Where necessary, the coherence between these sources as well as their comparability over time to measure trends in intra-EU mobility are discussed in the report. Below is elaborated on which datasets are used for which indicators:

- **Flows of movers:** Inflows and outflows of movers to EU Member States are measured based on Eurostat population statistics⁵¹. In this report, the latest available data is for 2021 (i.e. those who moved in the course of 2021).
- **Stocks of movers:** Headline statistics on the number of movers residing in another EU Member State than that of their citizenship (the ‘stock’ of movers) are gathered

⁴⁷ 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 (2022g), ‘Quality report of the European Union Labour Force Survey 2020’, Publications Office of the European Union, Luxembourg, pp. 31-32.

⁴⁸ See table of definitions for explanation and for further information on the legislative background, see most recently De Wispelaere, et al. (2021a).

⁴⁹ Ibid.

⁵⁰ For more details on these sources, the differences between them and issues of comparability, see Annex B.

⁵¹ Eurostat (2022a), *Emigration by age group, sex and citizenship* [Migr_emi1ctz] [Online]. Available online: https://ec.europa.eu/eurostat/web/products-datasets/-/MIGR_EMI1CTZ; Eurostat (2022c), *Immigration by age group, sex and citizenship* [Migr_imm1ctz] [Online]. Available online: https://ec.europa.eu/eurostat/databrowser/view/migr_imm1ctz/default/table?lang=en.

from Eurostat population statistics⁵². In this report, the latest available data is for 2022 (i.e. for those movers registered on 1 January 2022).

- **Socio-demographic and labour market indicators:** To facilitate a more accurate analysis of these concepts, data from the EU-LFS is used⁵³. The latest available data in this report is annual averages for 2022. Eurostat population data lacks the detail required to study some demographic aspects of the mover population (e.g. interaction between citizenship of movers *and* country of destination).
- **Thematic chapter on the mobility of retirees:** In addition to some analysis using EU-LFS data, the thematic chapter relies heavily on data from the 2021 database on cross-border pensions assembled by KU Leuven⁵⁴.

⁵² Eurostat (2022f), *Population on 1 January by age group, sex and citizenship [Migr_pop1ctz]* [Online]. Available online: https://ec.europa.eu/eurostat/databrowser/view/MIGR_POP1CTZ.

⁵³ 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.

⁵⁴ De Wispelaere, et al. (2021b), 'Cross-border old-age, survivors' and invalidity pensions', European Commission (DG EMPL), Brussels.

Table 1: Main indicators of intra-EU labour mobility in 2022

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

* *Source:* Eurostat population statistics [Migr_pop1ctz]⁵⁵. According to Eurostat population statistics, the total working-age population in the EU in 2022 was 260.5 million, and in 2021 263.7 million. The 2022 estimates (including for total working-age population) exclude values for Lithuania due to missing data.

** *Source:* EU-LFS 2021, custom extraction by Milieu. According to EU-LFS statistics, the total active population in the EU in 2022 was 205 million, and in 2021 202 million. 2022 estimates exclude values for Lithuania due to missing data.

*** *Source:* HIVA-KU Leuven, administrative data PD A1 questionnaire. Unlike previous reports, 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]⁵⁶. 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 mobility

⁵⁵ Eurostat (2022c).

⁵⁶ Ibid.; Eurostat (2022a).

and outflows, as figures are not available for outflows of nationals. Additionally, for outflows, 2020 values are used instead of 2021 for Belgium, Germany, Ireland, Poland and Sweden 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 2022 was 184.5, and in 2021 181.5 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 million were covered under Art. 12 (approximately 1.8 million persons), 1.4 million under Art. 13 (approximately 1.3 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, et al. , forthcoming), 'Posting of workers – Report on A1 Portable Documents issued in 2022, HIVA - KU Leuven, Leuven.

2 Recent developments on the mobile working-age population

2.1 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, both at EU/EFTA and country level. It also breaks down the composition in terms of gender and age. The second section looks at the trends in stocks of working-age movers in more detail and develops on their demographic characteristics in specific countries of residence. The last section focuses on specific categories of working-age movers, including cross-border and posted workers and returnees.

Key findings

Overall trend

- There was a slight rise of labour mobility during 2021, most likely because of more lenient travel restrictions in 2021 as opposed to the pandemic year of 2020. Despite this rise, mobility did not return to the pre-pandemic levels of 2019.
- The stock of movers remained relatively stable between 2019 and 2022, as trends in inflows mirrored those of outflows with a slight decline in 2020 and an uptick in 2021.

Flows of working-age movers

- Based on Eurostat population statistics, the inflow of EU movers to EU Member States increased from 804 000 in 2020 to 859 000 in 2021 (+7%).
- An increase was also recorded for outflows of EU movers, i.e. non-national EU-citizens leaving EU countries, from 470 000 to 505 000 (+7%). The number of nationals leaving their country increased from 686 000 to 709 000 (+3%). ⁽⁵⁷⁾
- 58% of incoming EU movers in the EU were male. As in previous years, the proportion of male movers was particularly high in Central and Eastern European countries, such as Poland, Bulgaria and Lithuania. Only three member states (Portugal, Italy and Greece) reported more working-age women than men moving into the country.
- 54% of incoming working-age EU movers in 2021 were 20-34 years old. This can be contrasted with the age-structure of working-age nationals, 45% of whom are in this age bracket. This suggests that individuals who are in the early stages of their careers are more inclined to relocate in the EU. The relative size of this age group was highest in the Netherlands (70%), Denmark (66%), and Estonia (64%).

⁵⁷ These are the values provided by Eurostat, on the basis of the data received from Member States. Differences 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.

- At the other end of the age distribution, the proportion of older movers (aged 50-64) was highest in Hungary (32%), Bulgaria and Croatia (both at 30%).
- The inflow of third-country nationals shows marked fluctuations and was at 1 425 000 persons arriving in EU/EFTA countries in 2021.

Stocks of working-age movers

- The total numbers of EU citizens living in another country has remained relatively stable over time at ca. 10 million. Between 2021 and 2022, it decreased by less than 1%, to around 9.9 million.
- Since 2016, the composition of EU movers by citizenship has remained relatively stable. Romanians continue to be the largest group, accounting for 25%, followed by Polish at 12% and Italians at 10% of the total.
- Just over 33% of the working-age EU movers (3.4 million) live in Germany, which remains the primary destination country for EU movers in 2022.
- Luxembourg had the highest share of EU movers as a proportion of their total population at 41%, followed by Switzerland at 20%.
- The gender distribution of EU movers in 2022 remained comparable to previous years, with 51% of movers being male and 49% being female. – Together with the high share of male movers, this indicates that male movers have a tendency to return quicker to their country of citizenship.
- In 2022, 40% 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 (33%), working-age EU movers are thus relatively young.

Specific categories of working-age movers

- There were approximately 1.8 million cross-border workers reported in the EU and EFTA at the end of 2022. This represents an 8% increase in comparison to 2021. Similarly to the previous years, the most important countries of origin were France (451 000), Germany (237 000) and Poland (198 000), whereas the main destination countries were Germany (401 000) and Switzerland (338 000).
- In 2022, the total number of postings in the EU and EFTA rose to 4.6 million (+27% compared to 2021), distributed among an estimated 3.1 million individual persons (+19% compared to 2021). This is mainly driven by a significant increase of PDs A1 issued in Germany (+611 000).
- An estimated 656 000 movers returned to their countries of origin in 2021, which is an 11% increase in comparison to the previous year. The largest returning destination is Romania at 119 000.

2.2 The flow of working-age EU movers

In this section, the dynamics of mobility of working-age movers between 2016 and 2021 are explored, shedding light on the trends that have shaped their movement at the EU and EFTA level. 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 2021, with a focus on inflows and outflows by country⁵⁸.

2.2.1 Trends in the flow of working-age EU movers

Inflows to the EU and EFTA

The trends in inflows into EU/EFTA countries from 2016 to 2021 (Figure 1) reveal a stable presence of EU movers, a more dynamic pattern among nationals, and notable fluctuations in the inflow of third-country nationals, with external factors like the COVID-19 pandemic playing a role in shaping these mobility and migration trends. As data is only available until 2021, it does not yet reflect any consequences of the war in Ukraine which began in 2022.

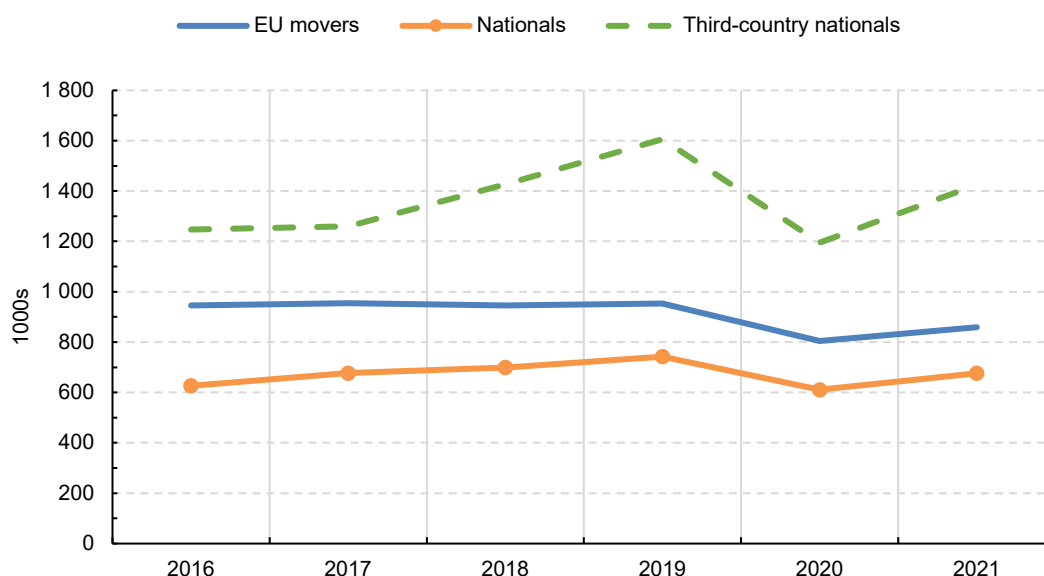
EU movers have been a consistent and significant component of inflows into EU/EFTA countries over the six-year period from 2016 to 2021. While their numbers remained relatively stable, a decline was observed in 2019 and 2020, dropping from 953 000 in 2019 to 804 000 in 2020. This dip may have been influenced by external factors, including the COVID-19 pandemic and related travel restrictions⁵⁹. However, in 2021, EU movers experienced a rebound, with their numbers reaching 859 000. This resurgence underlines the enduring importance of intra-EU mobility.

The inflow of nationals (i.e. returnees to their country of citizenship, discussed further in Section 2.4.3) has instead shown slight variations. It increased from 627 000 in 2016 to 742 000 in 2019, possibly indicating rising internal migration. In 2020, this number dropped to 589 000, likely influenced by the pandemic, with a modest rebound to 676 000 in 2021.

The inflow of third-country nationals (from non-EU countries) exhibited more notable fluctuations. From 2016 to 2019, it steadily rose from 1 247 000 to 1 606 000. In 2020, this trend reversed, with the figure dropping to 1 195 000, largely due to pandemic-related factors. There was a resurgence in 2021, with 1 425 000 third-country nationals arriving in EU/EFTA countries. These shifts highlight the external factors shaping the movement of non-EU individuals into the region.

⁵⁸ The absolute inflows to all EU and EFTA countries in 2017-2021 are shown in Table 27 (nationals), Table 28 (EU movers) and Table 29 (third-country nationals) in Annex C.1.

⁵⁹ For further discussion of the effect of COVID-19 restrictions and the pandemic overall on labour mobility in the EU, see the 2022 and 2021 labour mobility reports: Fries-Tersch, et al. (2022); Hassan, et al. (2022). Furthermore, it should be noted that data on 'EU movers' in Figure 1 include UK nationals up to 2019, which may explain some of the 2019/2020 differences.

Figure 1: Inflows of movers in the EU and EFTA, 2016-2021

Note: 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. EFTA movers are omitted due to the small size of the group.

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

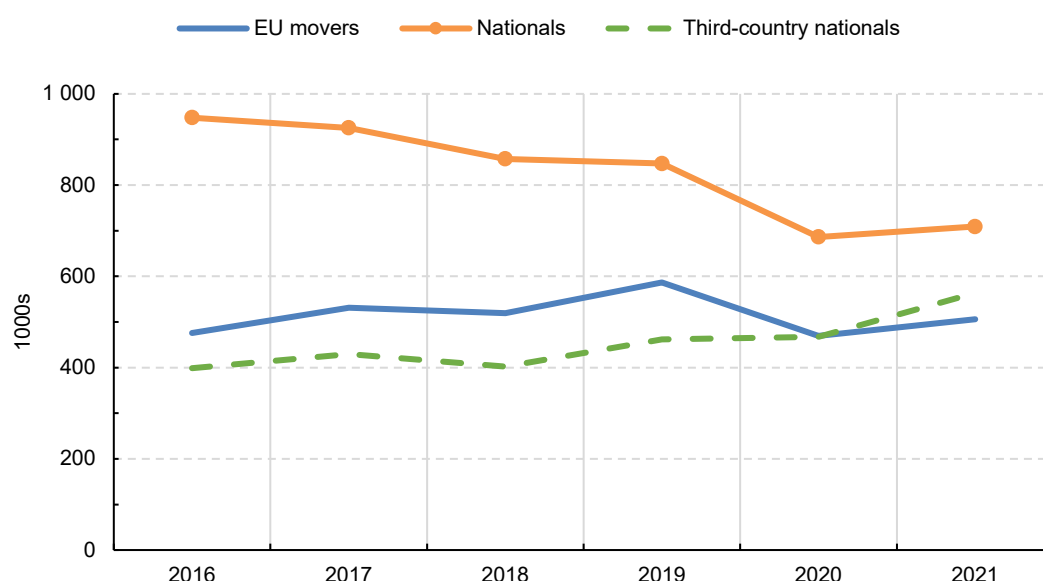
Outflows from the EU and EFTA

The outflow of EU movers from EU-27 and EFTA countries displayed a consistent pattern between 2016 and 2021, with a slight uptick in 2021 (Figure 2). The outflows of nationals exhibited more varied patterns and for third country nationals a significant increase of outflows was observed in 2021. However, as the data does not provide information on the specific destination of these outflows, it remains challenging to discern whether these movements entail relocation to other EU Member States or whether they involve individuals leaving the EU altogether.

The outflow of EU movers showed some fluctuations but generally remained relatively stable. The figures ranged from 476 000 in 2016 to 586 000 in 2019, with some variations. In 2020, there was a significant drop to 470 000, likely influenced by the impact of the COVID-19 pandemic on mobility. However, the number of EU movers rebounded in 2021 to 505 000, marking a 7% increase compared to the previous year and suggesting that intra-EU mobility has recovered to some extent.

The outflow of nationals (i.e. individuals from the reporting country) exhibited a generally decreasing trend between 2016 and 2020, dropping from 948 000 to 686 000. This decline could be induced by various factors, including economic conditions or changes in opportunities. In 2021, there was a slight increase, with the number of nationals moving out rising to 709 000. This increase represents a 3% uptick compared to 2020.

The outflow of third-country nationals (i.e. individuals from non-EU countries) followed a different pattern, with noticeable fluctuations. It increased from 399 000 in 2016 to 462 000 in 2019, indicating a gradual upward trajectory. In 2020, despite the pandemic, the numbers remained relatively stable at 467 000, increasing significantly in 2021 to 563 000 third-country nationals leaving from EU-27 and EFTA countries. This represents a 21% rise compared to 2020 levels.

Figure 2: Outflows of movers in the EU and EFTA, 2016-2021

Note: Data not available for Cyprus, France, Greece, 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. 2019 values used for Estonia. 2020 values used for Belgium, Switzerland, Germany, Ireland, Poland and Sweden.

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

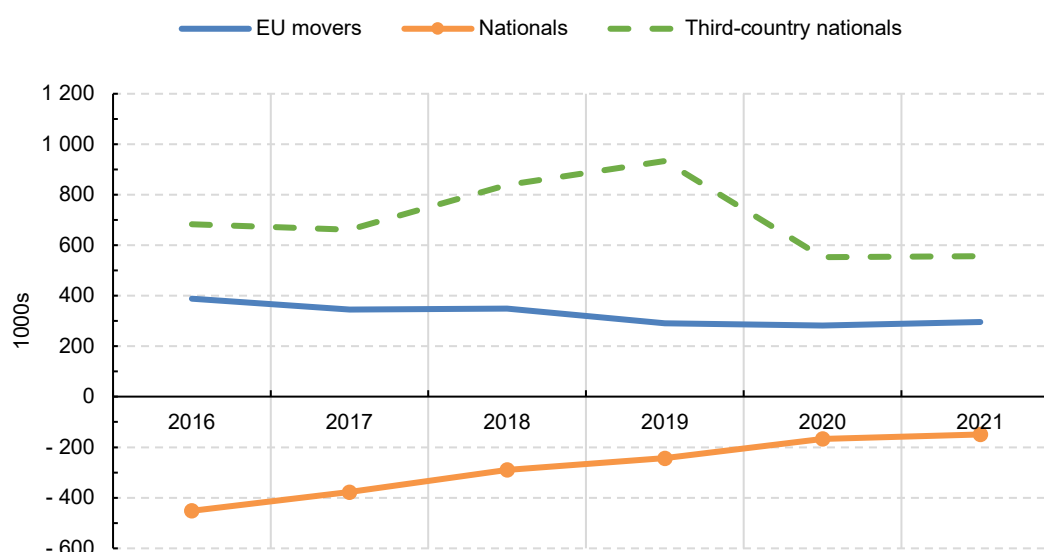
Net mobility in the EU and EFTA

Net mobility between 2016 and 2021 (Figure 3) reveals a rather stable situation for EU movers, a tendency to less net-mobility for nationals, and notable fluctuations for third-country nationals. Those variations highlight the influence of both internal and external factors on these migration patterns.

The net mobility of EU movers displays a slow declining trend over the years from 2016 to 2021, starting at a net mobility of +388 000 in 2016, and gradually decreasing to +296 000 in 2021. Despite fluctuations, this decreasing trend indicates a reduced surplus of EU movers compared to the initial years of the period.

In contrast, the net mobility of nationals (i.e. individuals from the reporting country) started with a net-outflow of -452 000 in 2016, which indicates more nationals leaving than returning, and has gradually decreased to -149 000 in 2021, implying that the gap has notably narrowed. It is to be noted that this narrowing gap is mostly caused by less people leaving their country of nationality (Figure 2) and not by an increase of return mobility (see Figure 1).

Lastly, the net mobility of third-country nationals (i.e. individuals from non-EU countries) demonstrates notable fluctuations. Starting at a surplus of +683 000 in 2016, it further increased to +933 000 in 2019, indicating a substantial influx of third-country nationals to EU-27 and EFTA countries. However, in 2020, there was a sharp decline to +553 000, likely influenced by the COVID-19 pandemic's impact on mobility. By 2021, the net mobility had slightly rebounded to +556 000, though it remained below the 2019 peak. Fluctuations in net mobility of third country nationals are more caused by fluctuations in inflows, whereas outflows show a steadier development.

Figure 3: Net mobility of movers in the EU and EFTA, 2016-2021

Note: Data not available for 'EFTA movers' as well as Cyprus, France, Greece, 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. 2019 values used for Estonia. 2020 values used for Belgium, Switzerland, Germany, Ireland, Poland and Sweden

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

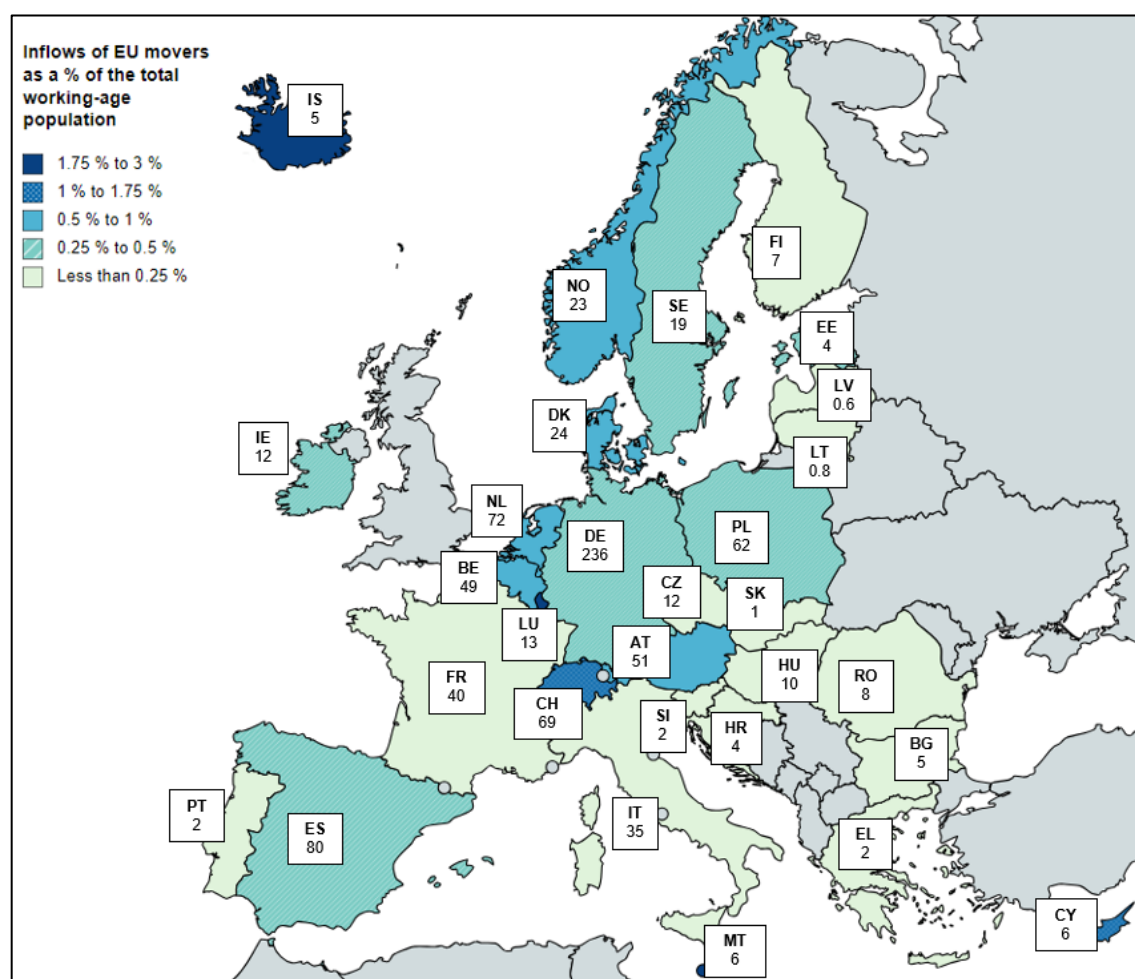
2.2.2 Flows and characteristics of working-age EU movers by country

Inflows by EU and EFTA country

Figure 4 and Table 2 provide insights into the inflows of EU movers to individual EU and EFTA countries in 2021, both in absolute terms and as a proportion of the national working-age population. This dual perspective unveils the favoured destinations for these movers and sheds light on the nations where their presence carries the most weight.

Notably, in 2021, relatively smaller countries such as Luxembourg (3.1%) and Iceland (2.1%) stand out for welcoming the highest proportions of EU movers relative to their national populations, followed by Switzerland (1.3%), Austria (0.9%), and Belgium (0.7%).

In absolute terms, Germany remained the top individual destination, attracting 236 000 movers, with Spain (80 000), Netherlands (72 000), Switzerland (69 000), and Poland (62 000) following behind. Four out of these five major destination countries experienced an increase in the number of working-age individuals moving in, with Spain leading the way with a substantial 27% surge in 2021 relative to the previous year. Since 2017, Switzerland, Germany, Spain, and the Netherlands, have consistently occupied the list of the top four destinations for annual inflows, indicating their enduring attractiveness to EU movers, while Poland has emerged as a top destination from 2020 onwards, surpassing Austria, France and Belgium.

Figure 4: Inflows of movers to EU and EFTA countries (1 000s and %), 2021

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

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

Table 2: Inflows of movers by main countries of destination, 2020-2021

Largest inflows of EU movers in 2021 (percentage compared to 2020 in brackets)			Largest inflows of EU movers as a share of total working-age population in 2021 (pps compared to 2020 in brackets)		
Member State	1 000s	% change	Member State	%	pps change
DE	236	(-3 %)	LU	3.1 %	(+0.2 pps)
ES	80	(+27 %)	IS	2.1 %	(+0.2 pps)
NL	72	(+15 %)	CH	1.3 %	(+ 0.08 pps)
CH	69	(+7 %)	AT	0.9 %	(- 0.01 pps)
PL	62	(+13 %)	BE*	0.7 %	(+0.1 pps)

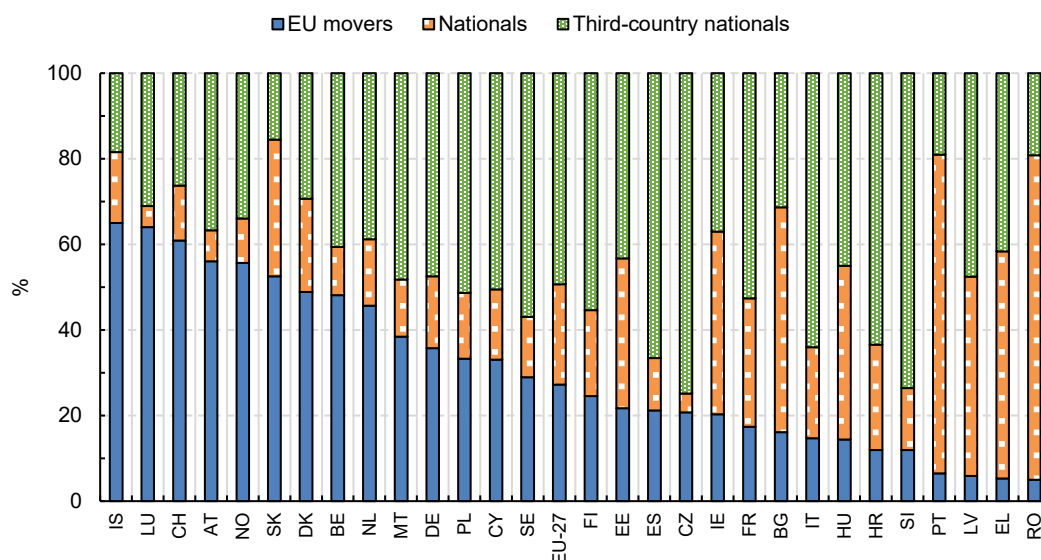
*Note: MT and CY are omitted from the table because of missing 2020 data.

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

Examining the overall composition of inflows to EU and EFTA countries in 2021 reveals interesting patterns (Figure 5). Similarly to 2020, EU movers make up more than half of the inflows in six countries – Iceland (65%), Luxembourg (64%), Switzerland (61%), Austria

(56%), Slovakia (52%) and Norway (56%) – while they account for less than 5% of inflows in Romania and Lithuania. Some countries, such as Portugal (75%) and Romania (76%), have a high percentage of their inflows consisting of nationals, indicating a significant return mobility (see further discussion in Section 2.4.3). Countries like Croatia (63%), Italy (64%) and Spain (67%) have a notable share of third-country nationals.

Figure 5: Composition of inflows of movers to EU and EFTA countries, 2021⁶⁰



Note: EFTA movers excluded due to low numbers.

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

Outflows by EU and EFTA country

Table 3 provides insights into the outflows of EU movers from main EU and EFTA countries of destination in 2021, both in absolute terms and as a proportion of the national working-age population.

In 2021, relatively smaller countries, such as Luxembourg (2.0%), Malta and Iceland (1.2% each), stand out for having the highest proportions of EU movers leaving their territories relative to their national populations. Switzerland and Austria (0.6% each) also exhibit notable percentages of outgoing EU movers.

In absolute figures, the most substantial outflows of EU movers in 2021 were documented from Spain (76 000), the Netherlands (36 000), and Austria (30 000). With an increase of 46%, Spain experienced a significant surge in departures compared to 2020, while the Netherlands and Austria observed more modest increases.

Thereby, it is worth highlighting that several countries did not report data on the outflows of EU movers in 2021, including Belgium, Germany, Ireland, Poland, Sweden, and Switzerland. Some of these non-reporting countries, such as Germany and Switzerland, had high outflows in 2020, with approximately 160 000 and 45 000 EU movers, respectively. Other countries, including France, do not report data on outflows on a longer period.

⁶⁰ The composition of inflows to all EU and EFTA countries in 2020-2021 are shown in Table 16 in Annex C.1. The absolute inflows to all EU and EFTA countries in 2017-2021 are shown in Table 27 (nationals), Table 28 (EU movers) and Table 29 (third-country nationals) in Annex C.1.

Table 3: Outflows of movers from main countries of destination, 2020-2021

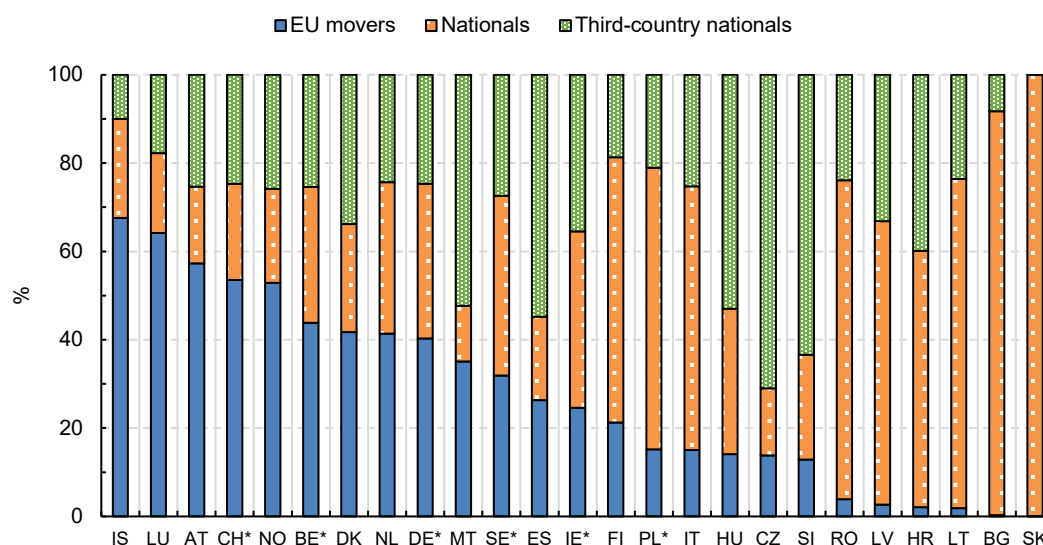
Largest outflows of EU movers in 2021 (or latest available year) (percentage compared to 2020 in brackets)			Largest outflows of EU movers as a share of total working-age population in 2021(or latest available year) (% compared to 2020 in brackets)		
Member State	1 000s	% change	Member State	%	pps change
DE*	160	-	LU	2 %	(+0.1 pps)
ES	76	(+46 %)	MT	1.2 %	-
CH*	45	-	IS	1.2 %	(-0.5 pps)
NL	36	(+7 %)	CH*	0.9 %	-
AT	30	(+12 %)	AT	0.6 %	(+0.1 pps)

*Note: 2020 values used for Germany and Switzerland. Data also not available for 'EFTA movers' as well as Belgium, Cyprus, Estonia, France, Greece, Ireland, Poland, Portugal, and Sweden.

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

Iceland, Luxembourg, and Austria together with Switzerland and Norway demonstrate a high proportion of EU movers in their outflows, with shares higher than 50% (Figure 6). Belgium, Denmark, Netherlands, Germany, and Ireland exhibit a balanced composition of the outflows, with shares of EU movers, nationals, and third-country nationals being rather similar. Poland, Romania, Latvia, Lithuania, Bulgaria, and Slovakia, and to a lesser extent Croatia, Italy, and Finland have a substantial share of their own nationals among their outflows, indicating a strong inclination to emigrate among their citizens. Further countries, including but not limited to Czechia and Sweden, show a prevalence of third country nationals among their outgoing movers. For several Member States (including Germany, Poland, and Switzerland) data for 2021 was not available at the time of writing the report⁶¹. In those cases, 2020 data was used.

⁶¹ All in all, detailed 2021 outflows data by nationality and age group is not available for Belgium, Estonia, Germany, Ireland, Poland, Switzerland, and Sweden. Additionally, detailed data of this kind is not available in any year for Cyprus, France, Greece and Portugal.

Figure 6: Composition of outflows of movers from EU and EFTA countries, 2021⁶²

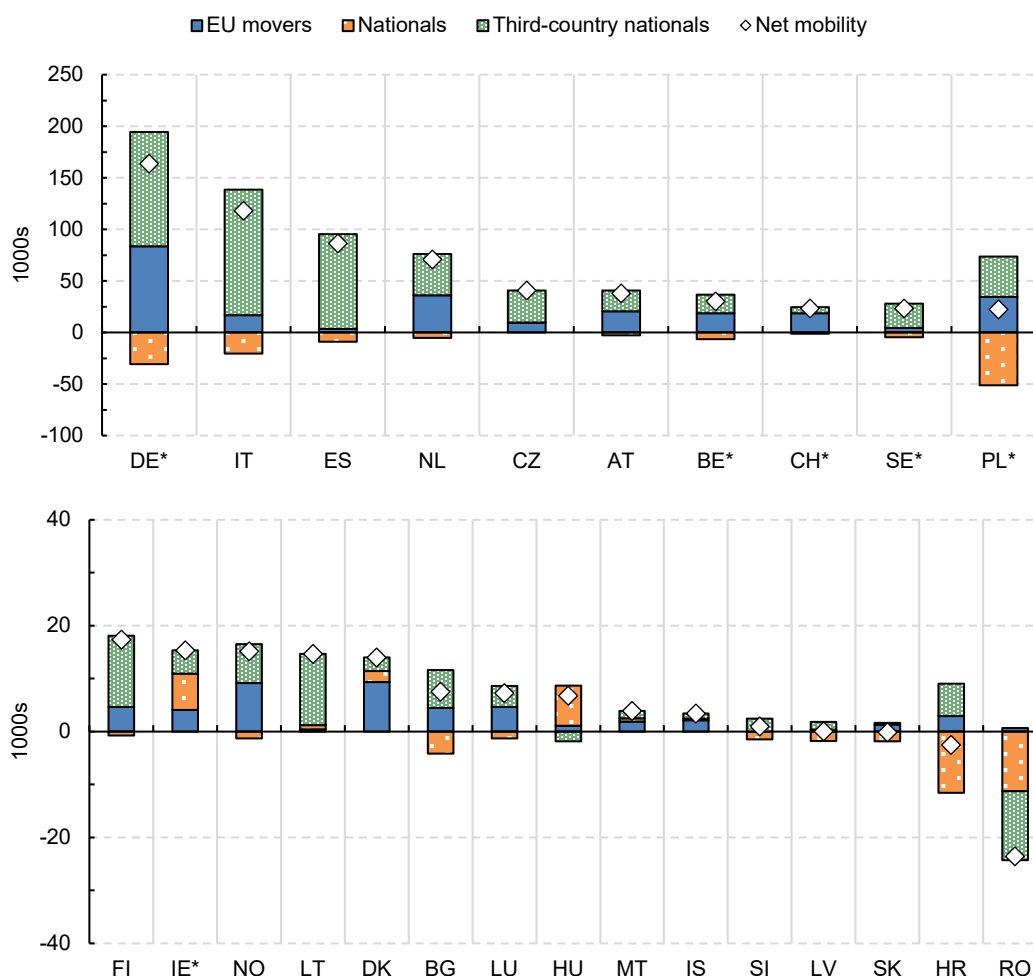
Note: Data not available for Cyprus, Estonia, France, Greece, and Portugal. Data from 2020 used for Belgium, Switzerland, Germany, Ireland, Poland, and Sweden, as indicated by an asterisk next to the label. No EU-27 average is provided due to these missing data, which would substantially affect its accuracy.

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

Net mobility by EU and EFTA country

Germany (in 2020), Italy and Spain were the largest net recipient countries with net mobility flows of respectively 164 000, 118 000 and 87 000 (Figure 7). Romania, Croatia, and Slovakia were the only net sending countries with a net mobility of -24 000, -2 500, and -150, respectively. This was due to a higher number of nationals and/or third-country nationals leaving compared to the number of arriving EU movers. With regard to EU movers only, the countries with the highest net inflows were Germany (84 000), the Netherlands (36 000) and Poland (35 000), while Slovenia shows the lowest inflow and was the only net sender of EU movers (albeit at an overall low volume of less than 1 000).

⁶² The composition of outflows from all EU and EFTA countries in 2020-2021 are shown in Table 17 in Annex C.1. The absolute outflows to all EU and EFTA countries in 2017-2021 are shown in Table 27 (nationals), Table 28 (EU movers) and Table 29 (third-country nationals) in Annex C.1.

Figure 7: Net mobility of movers by EU and EFTA countries, 2021⁶³

Note: Data not available for 'EFTA movers' or for Cyprus, France, Greece, and Portugal. Due to missing 2021 data, 2020 data is used for countries indicated with * (Germany, Belgium, Switzerland, Sweden, Poland, and Ireland).

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

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

Examining the gender breakdown of the inflows of EU movers across EU and EFTA countries for the year 2021 reveals no substantial alterations when compared to 2020 (Figure 8). Notably, the male-to-female ratio remained consistent with the 2020 figures, with 58% of EU movers being male and 42% female in 2021. This distribution closely aligns with the sectors where EU movers are typically employed, including manufacturing, construction, and wholesale and retail trade, which tend to be male-dominated fields (as elaborated upon in Section 2.3.2).

Eastern and Central European countries such as Poland (69%), Bulgaria (68%), and Lithuania (67%) display the highest proportions of male EU movers. Several explanations may provide insights on this trend, including occupational patterns and economic factors favouring occupations and industries that are traditionally male dominated. For instance, the share of workers employed in Manufacturing, Construction, Wholesale and retail trade,

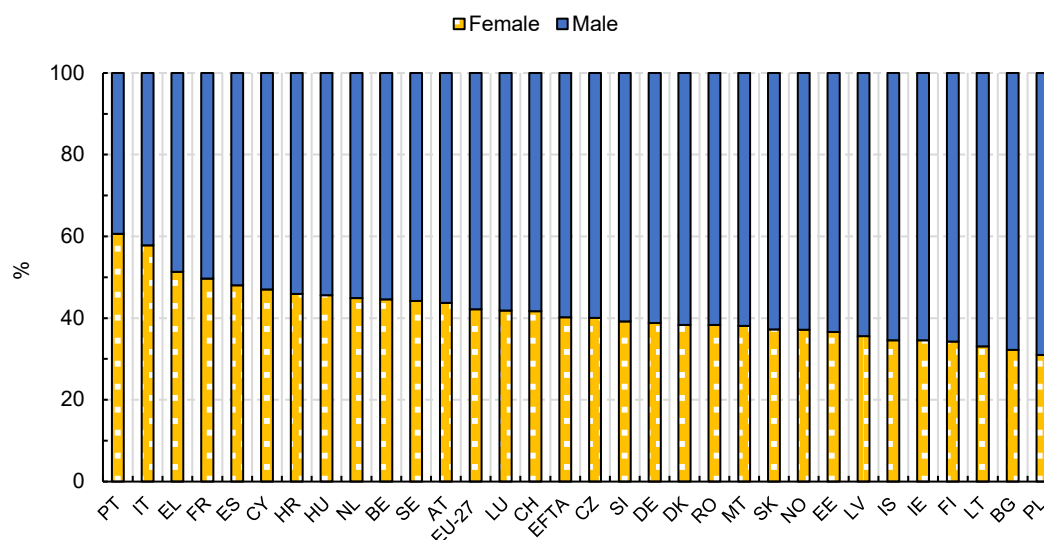
⁶³ The absolute net flows to all EU and EFTA countries in 2017-2021 are shown in Table 28 (nationals), Table 29 (EU movers) and Table 30 (third-country nationals) in Annex C.1.

and Transportation and storage, which are typically male-dominated sectors, is 2-4 percentage points higher in those three countries relative to the EU average⁶⁴.

There are only three countries where female movers represent more than 50% of the total inflows, namely: Portugal (61%), Italy (58%) and Greece (51%). In line with the reasoning above, and the employment rates of women as described later on (Figure 35), one can look at the sectoral structure of those countries to seek for an explanation. The sectors of Accommodation and food services and Human health and social work are typically female dominated. However, labour force statistics do not show a relatively higher prominence of those sectors in the three above countries, compared to the rest of EU Member States⁶⁵. While this could at prima facie imply no link between the relatively high proportion of women EU movers and the sectoral structure of those economies, one should account for the significant share of undeclared workers in those sectors and countries (that would thus not show up in labour force statistics). This is exemplified by the case of the domestic sector in Italy. The demand for domestic workers (and especially caregivers) is high and growing⁶⁶. This is mostly filled by EU movers (especially from Eastern and Central European countries), which represent around 70% of the total domestic workers, and are mainly women (89%). However, as the sector accounts for the highest share of irregularities and undeclared work (estimations go up to more than 50% of all cases of domestic work), this workforce is likely to not show up in official labour force statistics⁶⁷.

Besides sectoral patterns and economic factors and given that the focus of this section is on the overall working-age population, thus not solely on workers, other aspects such as existing networks and social connections, family reunification, cultural norms or temporary work may influence gender trends shown in the below figure.

Figure 8: Inflows of movers to EU and EFTA countries by gender, 2021⁶⁸



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

⁶⁴ Eurostat labour force survey statistics available online [LFSA_EGAN2].

⁶⁵ Only for Greece the share of the accommodation and food services sector out of the national economy seems to be larger than the EU average (8%, compared to an EU average of 4%). Italy and Portugal are instead in line with the EU average. The EU average for the human health and social work sector is around 11%. Italy is in line with this average, while Greece and Portugal are 3-4 percentage points lower. Eurostat labour force survey statistics available online [LFSA_EGAN2].

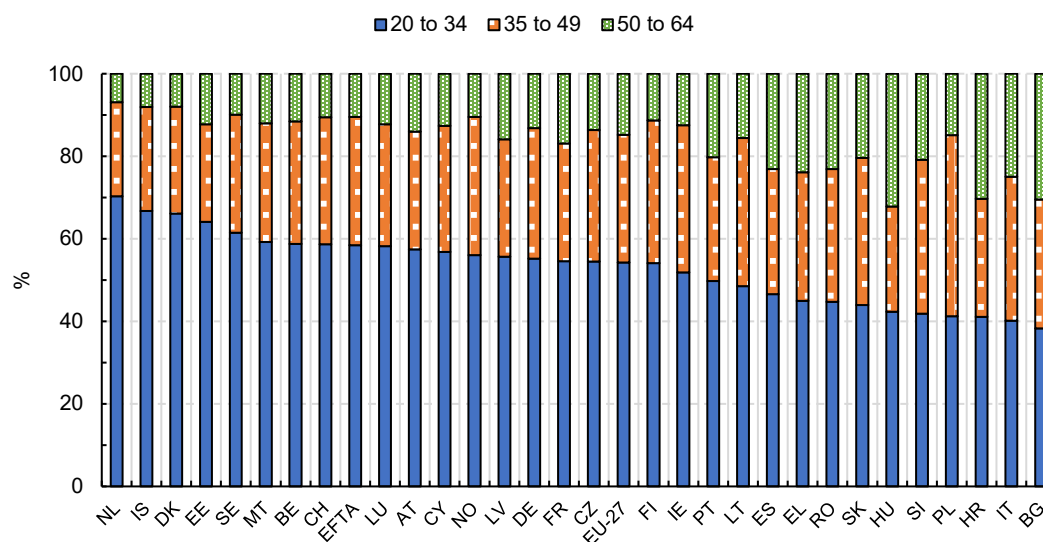
⁶⁶ The ageing of population in Italy results in an increase in the demand from private households for domestic workers, and especially (live-in) caregivers. ILO (2021), Making Decent Work a Reality for Domestic Workers. Progress and Prospects Ten Years After the Adoption of the Domestic Workers Convention, 2011 (No. 189).

⁶⁷ DOMINA National Observatory on Domestic Work (2020), 2nd Annual Report on Domestic work, 2020 Edition.

⁶⁸ The absolute numbers and percentages of inflows of EU movers to all EU and EFTA countries by gender in 2020-2021 are shown in Table 19 in Annex C.1.

In the EU overall, most inflows (54% or 413 000 individuals) fall within the age bracket of 20 to 34 years (Figure 9). Approximately 31%, equivalent to 236 000 people, belong to the 35 to 49 age group. A smaller fraction, constituting 15% or 112 000 individuals, falls into the 50 to 64 age category. This demographic makeup remains consistent with that observed in 2020, underscoring the trend that younger individuals, at an earlier stage in their careers, are more inclined to relocate to another EU or EFTA country.

Figure 9: Inflows of movers to EU and EFTA countries by age group, 2021⁶⁹



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

The Netherlands boasts the highest proportion of movers aged 20 to 34 (70%), with Iceland (67%), Denmark (66%), and Estonia (64%) following closely. These figures suggest a discernible trend of younger individuals seeking opportunities and experiences in these countries, potentially driven by educational pursuits, career advancement prospects, or personal development objectives.

Conversely, the largest percentage of EU movers in the age group 50-64 is observed in some Central and Southern European Member States. Hungary records the highest share at 32%, followed by Bulgaria (30%), Croatia (30%), Italy (24%), and Greece (24%). This pattern could be linked to overall low numbers of inflows and return mobility, where individuals who had previously moved return to their home country with a partner of different nationality.

Box 1: The share of working-age EU movers among all inflows of movers

Since this chapter focuses on working-age movers, only the 20-64 age group is covered in the figures and tables. While working-age movers make up the majority of inflows in all EU and EFTA countries, it is worth looking also at the other age groups.

At the EU level, there were 174 000 (18%) movers aged 0-19, compared to 762 000 (78%) working-age movers and only 39 000 (4%) movers aged 65 and older. The highest proportion of young movers (aged 0-19) can be found in Greece (31%), followed by Ireland (29%) and France (26%). The countries with the highest proportion of movers in the age group 65 and older are Croatia (16%), Hungary (13%) and Bulgaria (12%)⁷⁰.

⁶⁹ The absolute numbers and percentages of inflows of EU movers to all EU and EFTA countries in 2020-2021 by age group are shown in Table 19 in Annex C.1.

⁷⁰ These individuals may either (i) have moved to the country after their retirement, or (ii) they may have remained in a country they moved to during their working life. The data does not allow for a distinction.

2.3 The total number of working-age EU movers

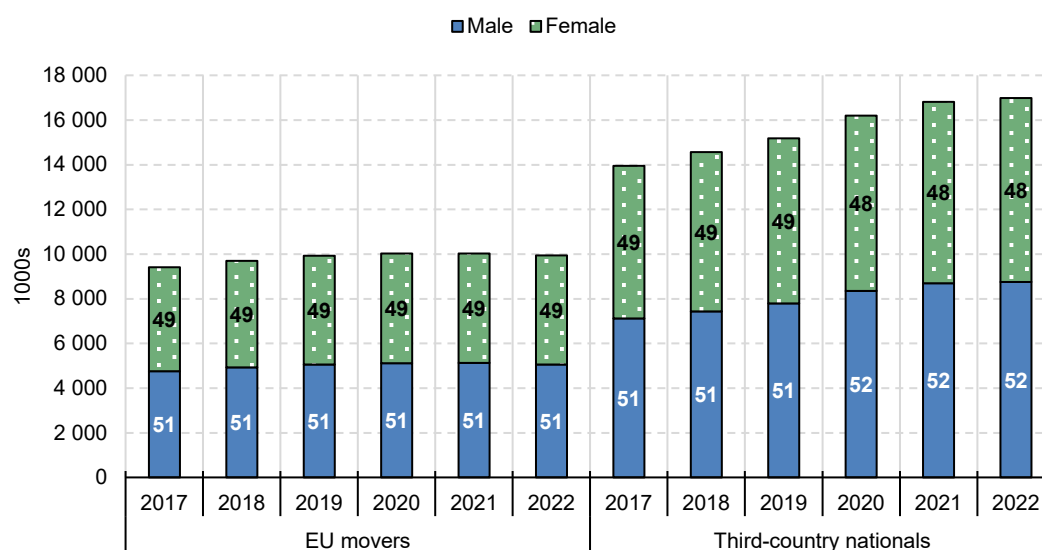
This section discusses the trends in the total number of movers (from here on discussed as the ‘stock’ of movers) in the EU as a whole and in individual countries. The section focuses on EU movers and, to a lesser extent, third-country nationals. It first considers trends, and thereafter demographic traits such as gender, nationality, and age.

2.3.1 Trends in the total number of working-age EU movers

In 2022, there were approximately 9.9 million EU movers and 16.9 million third-country nationals. The total number (‘stock’) of movers from EFTA countries has remained relatively steady at 153 000-154 000 between 2017 and 2022⁷¹ (Figure 10). Over this period, the number of EU movers increased by around 6.5%, while third-country nationals increased by 20.5%. The COVID-19 pandemic has impacted this growth, causing the stock of EU movers to remain relatively constant between 2020 and 2022⁷², while the number of third-country nationals continued to rise.

Looking at the gender dimension, over the span from 2017 to 2022, this composition remained predominantly steady, with only marginal fluctuations from one year to the next (Figure 10). As of 2022, the count stands at 5.1 million male EU movers, contrasting with 4.9 million female movers within the EU. When both groups are considered collectively, the total comprises 13.1 million female EU movers and third-country nationals in the EU for 2022, compared to 13.9 million males.

Figure 10: Stock of movers in the EU by gender, 2017-2022⁷³



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).

Source: Eurostat [migr_pop1ctz], Milieu calculations.

Looking at the age distribution of EU movers over the years, there has been a shift from younger (20-34 years old) towards older individuals (50-64 years old) (Table 4). Between 2017-2022, the proportion of individuals aged 20-34 has diminished from 36% to 33% of the total, while the representation of the age cohort 50-64 has risen from 23% to 27%.

⁷¹ Due to the small size of the group, EFTA movers have been omitted from Figure 10.

⁷² The stock of EU-movers even slightly decreased between 2021-2022 (a decrease of less than 1%)

⁷³ The absolute numbers and percentages of stocks of EU movers and third-country nationals by gender in 2017-2021 are shown in Table 20 in Annex C.1.

Throughout this period, the proportion of the 35-49 age group has remained constant at 40%.

Table 4: Stock of movers in the EU by age group, 2017-2022 (in 1 000)

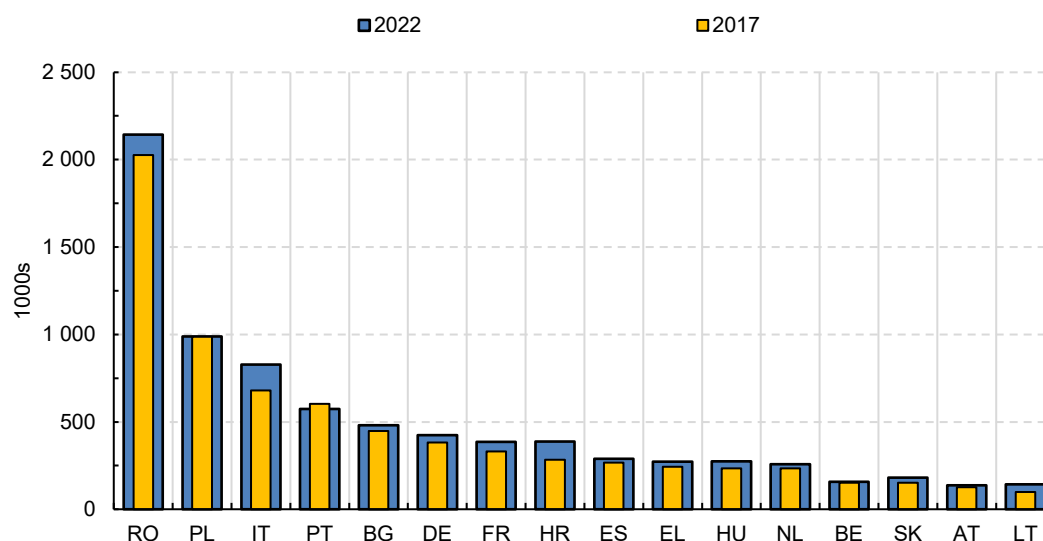
Age group	2017	2018	2019	2020	2021	2022
20 - 34 years	3 395 (36 %)	3 456 (36 %)	3 494 (35 %)	3 449 (34 %)	3 387 (34 %)	3 300 (33 %)
35 - 49 years	3 797 (40 %)	3 902 (40 %)	3 981 (40 %)	4 022 (40 %)	4 041 (40 %)	4 006 (40 %)
50 - 64 years	2 216 (24 %)	2 341 (24 %)	2 455 (25 %)	2 553 (26 %)	2 595 (26 %)	2 628 (27 %)
Total	9 409	9 699	9 930	10 024	10 024	9 933

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).

Source: Eurostat [migr_pop1ctz], Milieu calculations

Delving into national disaggregation, using EU-LFS data instead of Eurostat population data due to data limitations, shows a notable consistency in the main countries of origin between 2017 and 2022 (Figure 11). Within the EU movers from Romania, Poland, and Italy consistently represent the largest groups during this period. In 2022, the LFS registered 2.1 million movers from Romania in the EU, comprising 25% of the total; 988 000 movers from Poland (12%); and 829 000 movers from Italy (10%).

Figure 11: Stock of movers in the EU by nationality, 2017 and 2022



Note: Only countries with at least 100 000 EU movers in 2021 are displayed in the chart.

Source: EU-LFS 2022, custom extraction by Milieu.

2.3.2 Numbers and characteristics of working-age EU movers by country

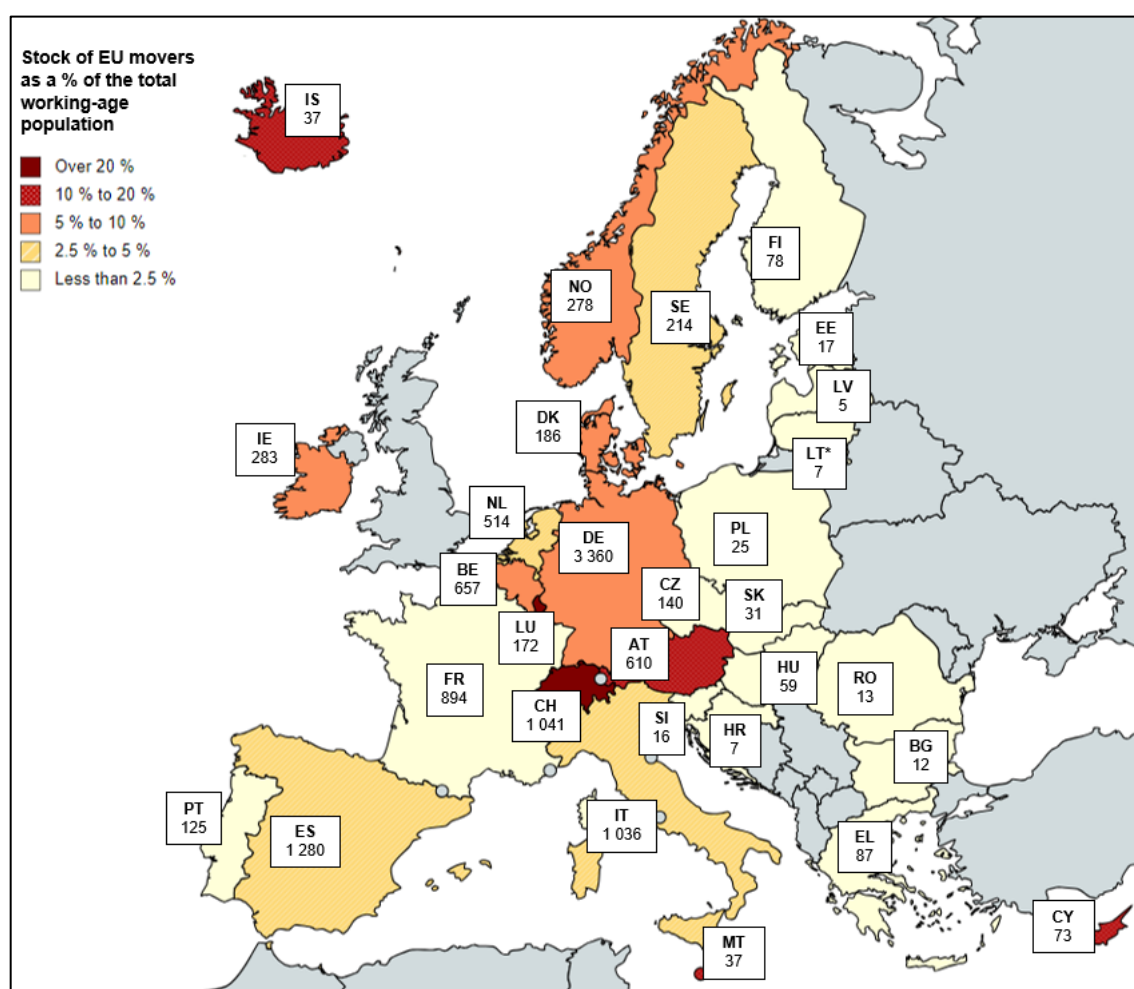
This section further explores the data presented in Section 2.3.1, focusing on the country level. It firstly discusses the main countries of destination for EU movers and their share in the total working-age population, to then analyse gender and age breakdowns for each country where data is available.

Main countries of destination for EU movers

Figure 12 and Table 5 provide insights into the stocks of EU movers to individual EU and EFTA countries in 2022, both in absolute terms and as a proportion of the national working-age population, shedding light on the actual and relative magnitude of the phenomenon in different countries.

With around 3.4 million EU movers, Germany was the largest destination country in the EU and EFTA, followed by Spain, Switzerland and Italy, each hosting more than 1 million movers. The lowest numbers of EU movers are found in Latvia, Lithuania, and Croatia (less than 10 000 each). As a share of the total working-age population, EU movers are relatively less present in Poland and Romania (0.1% each), while accounting for a staggering share in Luxembourg (41%), far greater than in any other EU or EFTA country. The proportion is between 10-20% in Switzerland, Iceland, Cyprus, and Malta.

Figure 12: Stock of movers in EU and EFTA countries (1 000s and %), 2022



Note: Countries are coloured based on the proportion of the total population that is made up of EU movers. Labels indicate Member State and the total number of movers on 1 January 2022, in 1 000s. Numbers have been rounded to the closest 1 000. Data for Lithuania, indicated by an asterisk, is for 2021 due to a lack of 2022 data.

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

Table 5: Stock of movers by main countries of destination, 2021-2022

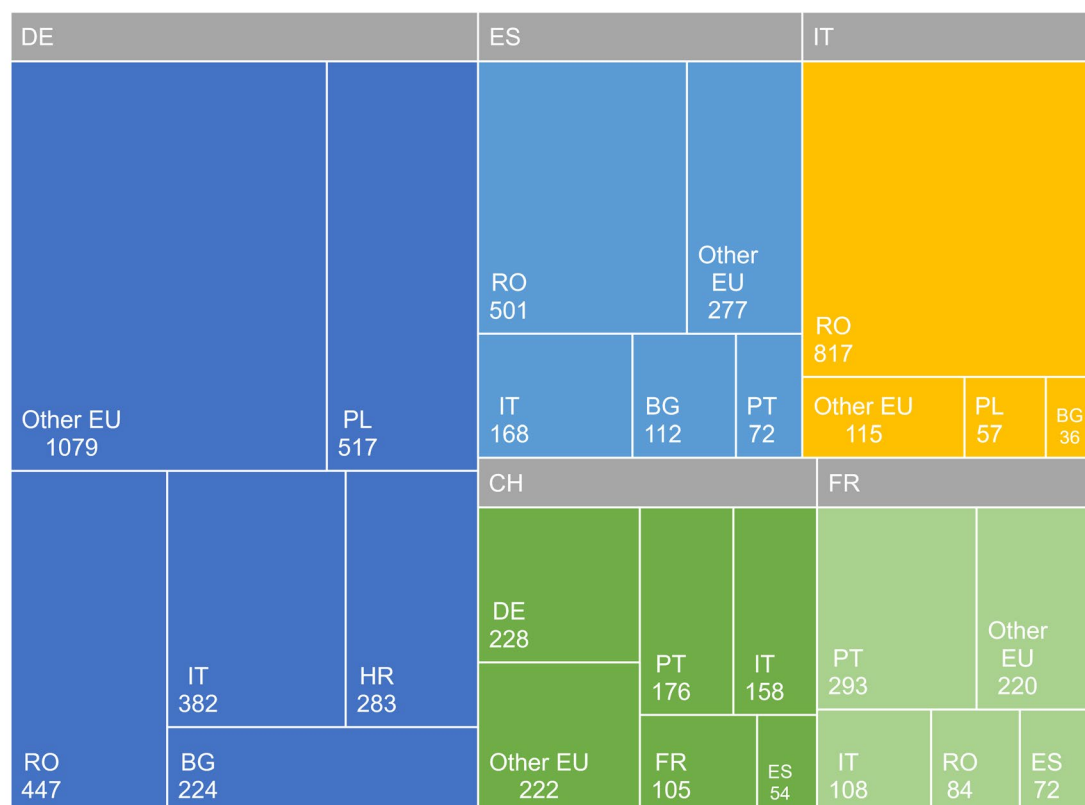
Largest stocks of EU movers in 2022 (percentage compared to 2021 in brackets)			Largest stocks of EU movers as a share of total working-age population in 2022 (% compared to 2021 in brackets)		
Member State	1 000s	% change	Member State	%	pps change
DE	3 360	(+0.9 %)	LU	41 %	(-0.4 pps)
ES	1 280	(-0.4 %)	CH	20 %	(+0.3 pps)
CH	1 041	(+1.7 %)	IS	16 %	(+0.7 pps)
IT	1 037	(-3.4 %)	CY	13 %	(-0.5 pps)
FR	894	(-0.4 %)	MT	11 %	(+0.4 pps)

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

Digging deeper into the main countries of origin for movers in the top five countries of destination in 2022⁷⁴, large disparities arise (Figure 13). Germany, the largest country of destination, exhibits a diverse range of countries of origin without any country strongly dominating. Indeed, similarly to 2021, the largest country of origin is Poland, accounting for 18% of total EU movers in Germany, followed by Romania (15%). The latter plays a dominant role in Italy, where Romanian movers constitute 80% of all movers in the country. In contrast, in Switzerland, more than half of movers (52%) come from the neighbouring countries of Germany, France and Italy.

⁷⁴ 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 14 and Figure 15 may differ from estimates based on Eurostat population statistics.

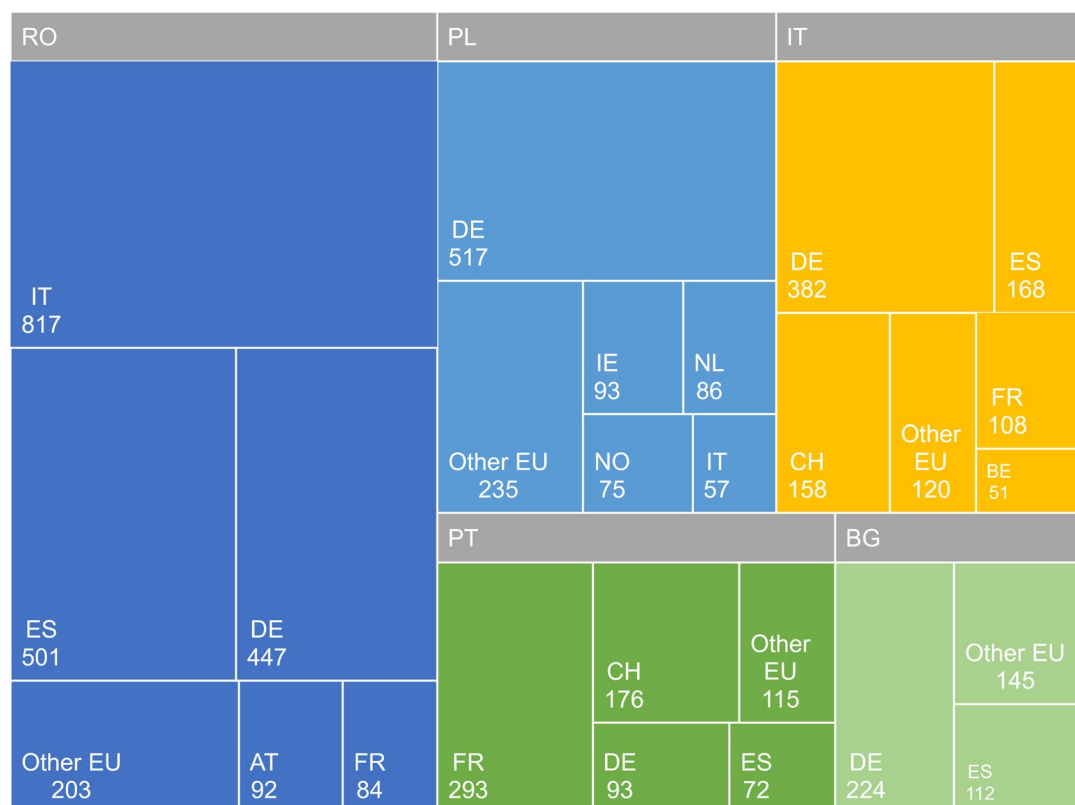
**Figure 13: Stock of movers in the main countries of destination by citizenship
(1 000s), 2022**



Source: EU-LFS 2022, custom extraction by Milieu

Complementing the picture with the main countries of destination for movers from the five largest countries of origin (i.e. Romania, Poland, Italy, Portugal and Bulgaria), shows a strong prevalence of Germany (Figure 14). Indeed, similarly to the previous year, Germany remains the most popular destination for movers from Poland (49%), Bulgaria (47%) and Italy (39%), and the third largest for movers from Romania (21%). Spain is the second most popular destination for movers from Bulgaria (23%), Romania (23%) and Italy (17%).

Figure 14: Stock of movers from the main countries of origin by country of destination (1 000s), 2022

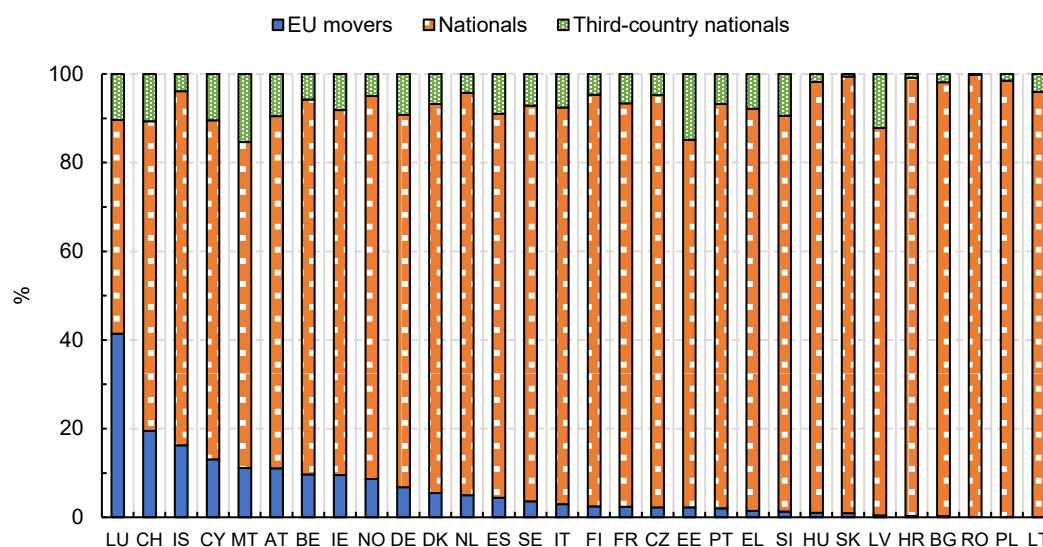


Source: EU-LFS 2022, custom extraction by Milieu

Lastly, examining the overall composition of the population in EU and EFTA countries in 2022 reveals interesting patterns (Figure 15)⁷⁵. While, unsurprisingly, nationals make up the highest share in all Member States, the population of EU movers is a whopping 41% in Luxembourg, and relatively high also in Switzerland (20%), Iceland (16%), Cyprus (13%), Malta and Austria (11% each). It is important to note however that the figures for EU movers do not include the substantial number of cross-border workers in the national workforce, in particular in Luxembourg and Switzerland, who have their residence in another Member State and are therefore counted as nationals (see Section 2.4.1). Finally, some countries like Malta (15%), Estonia (15%), Latvia (12%), and Switzerland (11%) have also a relatively high share of third country nationals.

⁷⁵ Due to its comparatively small size, EFTA movers are excluded from this visualisation.

Figure 15: Shares of EU movers, nationals and TCN in total working age population of EU and EFTA countries, 2022⁷⁶



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.

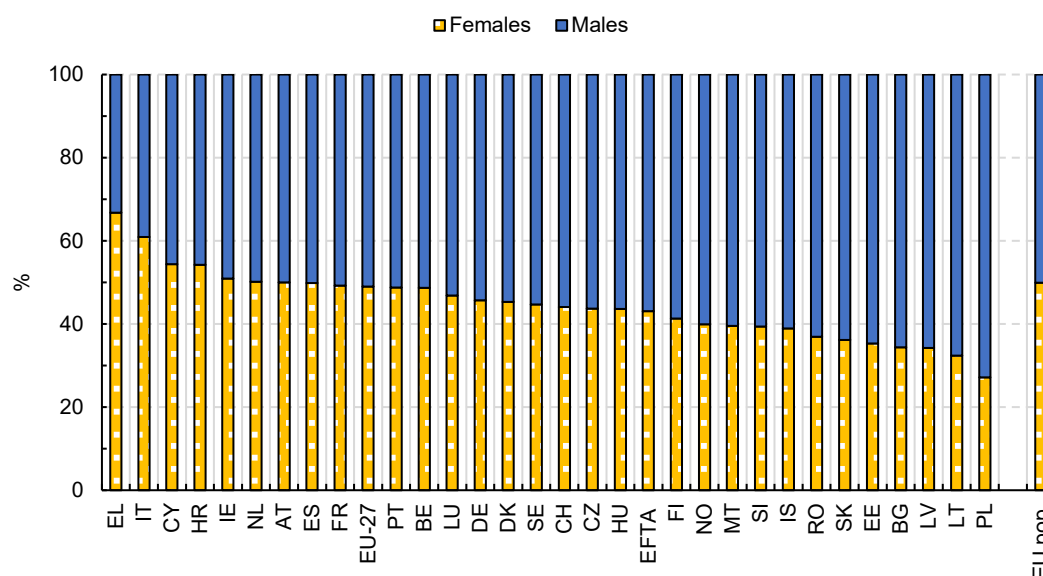
Source: Eurostat population statistics (Migr_pop1ctz), Milieu calculations.

EU movers by country, gender, and age group

Compared to 2021, the overall situation remained unchanged in 2022: 49% female movers against 51% male movers (Figure 16). Greece had the highest proportion of female movers (67%), followed by Italy and Cyprus with 61% and 54%, respectively. On the other end, Poland is the country with the highest share of male movers (73%), followed by Latvia and Bulgaria (both at 66%).

As seen above (Section 2.2.2), the gender distribution of EU movers could be partially linked to sectoral patterns. Countries (as in Eastern Europe) where sectors such as manufacturing, construction, transportation, play an important role in the economy, typically have a higher male representation among EU movers, whereas countries (such as Greece, Italy, Cyprus, Croatia) where service-related industries are relatively more prominent, generally have a higher female representation.

⁷⁶ Stocks 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 2021-2022 are shown in Table 22 in Annex C.1.

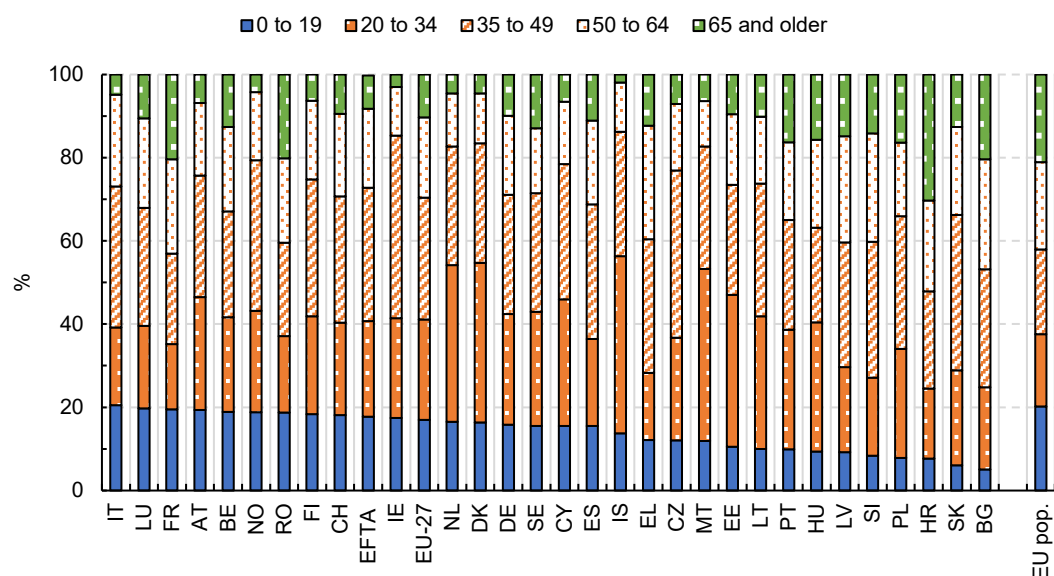
Figure 16: Stock of movers in EU and EFTA countries by gender, 2022⁷⁷

Note: 2021 values for Lithuania.

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

Looking at the age distribution of EU movers by country of residence, large disparities arise (Figure 17). Overall, the highest proportion of working-age individuals among all movers is found in Iceland (84%), Malta (82%) and Czechia (81%), while lowest shares are found in France (60%), Romania (61%) and Croatia (62%). Italy (21%) and Luxembourg (20%) are the countries with the highest proportion of EU movers aged 0-19. Conversely, Bulgaria (5%) and Slovakia (6%) have the lowest number of EU movers in the 0-19 age group. Considering the oldest age group, Croatia (30%) has the largest percentage of movers in this category, followed by Bulgaria, France, and Romania (each with 20%). Compared to the general EU population, all countries reported a higher share of movers that were working-age, especially among the 35-49 year-olds and 20-34 year-olds (except in France, Greece and Croatia for the latter).

⁷⁷ The absolute numbers and percentages of stocks of EU movers and third-country nationals by gender in all EU and EFTA countries in 2020-2021 are shown in Table 24 in Annex C.1.

Figure 17: Stock of movers in EU and EFTA countries by age group, 2022⁷⁸

Note: 2021 values for Lithuania.

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

2.4 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.

2.4.1 Cross-border workers

Cross-border workers refers to individuals who live in one EU or EFTA country but work in another. This encompasses various sub-groups, including frontier workers (who reside in border regions and regularly commute across the border), seasonal or other short-term mobile workers (who temporarily reside in the country of employment for a few months each year while maintaining their permanent residence in their home country), as well as workers who reside in one country but telework for another (further expanded in Box 2 below). However, as the data does not allow for detailed identification of these groups, this section looks at cross-border workers in general⁷⁹.

There are approximately 1.8 million cross-border workers in the EU in 2022 (Table 6). This is an increase of 8% in comparison to 2021 and a full bounce back to pre-pandemic levels⁸⁰. The biggest group of cross-border EU workers resides in France (444 000), of which around 10% (46 000) are EU movers. EU movers make up a more significant share of the cross-border workers residing in Austria (41%), followed by Belgium (37%), Germany (27%), Spain (23%) and Netherlands (22%). These EU workers typically live in those listed countries, and commute to Switzerland, Luxembourg, and Germany for work.

⁷⁸ The absolute numbers of stocks of EU movers and third-country nationals by age group in all EU and EFTA countries in 2020-2021 are shown in Table 25 in Annex C.1.

⁷⁹ For a more in-depth discussion of cross-border work in the EU, see Chapter 3 of the 2022 Mobility Report.

⁸⁰ In 2020 and 2021, the number of cross-border workers in the EU and EFTA dropped to slightly more than 1.6 million. For a more in-depth discussion, see Chapter 3 of the 2022 Mobility Report.

Table 6: Cross-border workers by nationality group and country of residence in the EU and EFTA (1 000s), 2022⁸¹

Country of origin	Nationals	EU movers	Total
EU-27	1 558	229	1 786
FR	398	46	444
PL	198		198
DE	173	63	237
IT	127	(5)	132
RO	115		115
HU	84		84
BE	80	47	127
CZ	60	(3)	63
SK	44		44
HR	37		37
ES	33	10	43
SE	29	7	36
AT	27	19	46
BG	25		25
NL	20	(5)	25
LV	20		20
SI	20		20

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.

Source: EU-LFS 2021, custom extraction by Milieu.

Similarly to 2021, France, Germany and Poland remained the largest countries of residence for cross-border workers in 2022 (Table 7). Nearly half of the workers in France move to EFTA countries, pointing to the large flow of cross-border workers going to Switzerland. In terms of destination, Germany and Switzerland were again the largest destination countries with 401 000 and 338 000 cross-border workers, respectively. Cross-border EU workers constitute a staggering share of the workforce in Luxembourg, making up 45% of the total workforce. Those mainly arrive from France, Germany and Belgium and underlining the strong contribution of cross-border labour mobility to the Luxembourgish economy.

⁸¹ The distribution of cross-border workers by country of origin and destination is shown in Table 31 in Annex C.1.

Table 7: Main countries of origin and destination for cross-border workers in the EU and EFTA (1 000s), 2022

Main countries of origin					Main countries of destination		
Member State	To EU-27	To EFTA	Total	% of workforce	Member State	Total	% of workforce
FR	235	209	444	1.7 %	DE	401	1.1 %
DE	179	58	237	0.6 %	CH	338	9 %
PL	180	18	198	1.2 %	LU	228	45 %
BE	127		127	2.7 %	AT	158	4 %
RO	115		115	1.5 %	NL	140	2 %
HU	84		84	1.8 %	BE	90	2 %
CZ	64		64	1.3 %			

Note: Only Member States with at least 50 000 cross-border workers (either incoming or outgoing) are shown.

Source: EU-LFS 2021, custom extraction by Milieu.

Box 2: Cross-border workers and teleworking

As evidenced in last year's version of this report, there is no indication that cross-border workers are more likely to telework than other EU workers. In 2022, around 12.2% of the EU workforce was "sometimes" working from home (+3.6 percentage points relative to 2020), while 10.2% was "usually" working from home (-1.8 pps). For cross-border workers, these figures are slightly lower, namely 10% (+2 pps) and 8% (-2 pps), respectively. The main countries of residence with cross-border workers using teleworking practices in 2022 were Belgium, the Netherlands, Austria and Denmark. All of them were above the EU average, with Belgium, the Netherlands and Austria reaching almost 30% of teleworking cross-border workers⁸².

The relatively lower (and unevenly distributed across Member States) uptake of teleworking practices among cross-border workers may find its explanation in the nature of their main sectors of activity (e.g. construction, manufacturing, tourism), which are generally less adaptable to teleworking practices⁸³. Indeed, while around 37% of EU workers are in occupations that can be carried out from home, those are generally concentrated in knowledge- and ICT-intensive services (e.g. financial services, information and communication, education, professional scientific and technical activities)⁸⁴.

While teleworking opportunities for cross-border workers may currently be limited, 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. However, it is important to acknowledge that this definition may encompass a segment of the teleworking population. Indeed, as remote working becomes more common, the lines between traditional cross-border work and teleworking can blur. This evolving landscape requires further observation and analysis.

⁸² De Wispelaere, F. (forthcoming), Cross-border workers working from home, HIVA – KU Leuven, Research institute for work and society.

⁸³ Hassan, E., Siöland, L., Akbaba, B., et al. (2022).

⁸⁴ Joint Research Centre (JRC) (2023), Who can telework today? The teleworkability of occupations in the EU, Science for Policy Briefs, European Commission.

2.4.2 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 persons⁸⁵. 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 (see Table 26) and (2) through available data from prior declaration tools of each Member State.⁸⁶ 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 2022, the number of postings in the EU-27 and EFTA returned to pre-pandemic levels: the total number of issued PDs A1 amounted to 4.6 million (+27% compared to 2021). Of these, 3 million PDs A1 were issued under Art. 12 (approximately 1.8 million persons), 1.4 million under Art. 13 (approximately 1.3 million persons), and 0.2 million for others (e.g. Art. 16). The estimated number of individual persons to whom the PDs A1 were issued increased to 3.1 million (+19% compared to 2021)⁸⁷. Consequently, each person was – on average – posted 1.5 times. Considering that according to the prior declarations 28% of postings are for a period of less than 8 days, a considerable number of workers might be posted much more frequently throughout the year.

When looking at the country level, it becomes clear that Germany is the main driver of the increase in PD A1 documents issued. In 2022 it issued 1.6 million PDs A1, a rise of 61% compared to the year before. Though at smaller numbers, other significant increases were observed for Ireland (+217%), Switzerland (+76%), Norway (+73%), and France (+63%)⁸⁸.

2.4.3 Return mobility and returnees in the EU

Movers who relocate back to their home country engage in ‘return mobility’ and are referred to as ‘returnees’. This group merits special consideration as it indicates the extent to which the mobility abroad is temporary, and as returnees can be an important source of human capital for the countries of origin.

In general, return mobility rose from 589 000 to 656 000 or by 11% between 2020 and 2021 (Table 8), most likely because of more lenient Covid-19 restrictions. However, return mobility in 2021 did not increase sufficiently to meet the pre-pandemic levels of 2019. The increase is most visible in the Southern European countries of Spain (36%) and Italy (35%). The largest absolute increase in return mobility between 2020 and 2021 can be seen in Romania, with an increase of 27 000. On the other hand, Poland is the only country of the list experiencing a decline (-16%) in return mobility between 2020 and 2021. For Poland, this decline is persistent throughout the years with an overall decrease of 58% between 2017-2021.

⁸⁵ 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].

⁸⁶ European Commission (2024, forthcoming).

⁸⁷ De Wispelaere, et al. (2023, forthcoming).

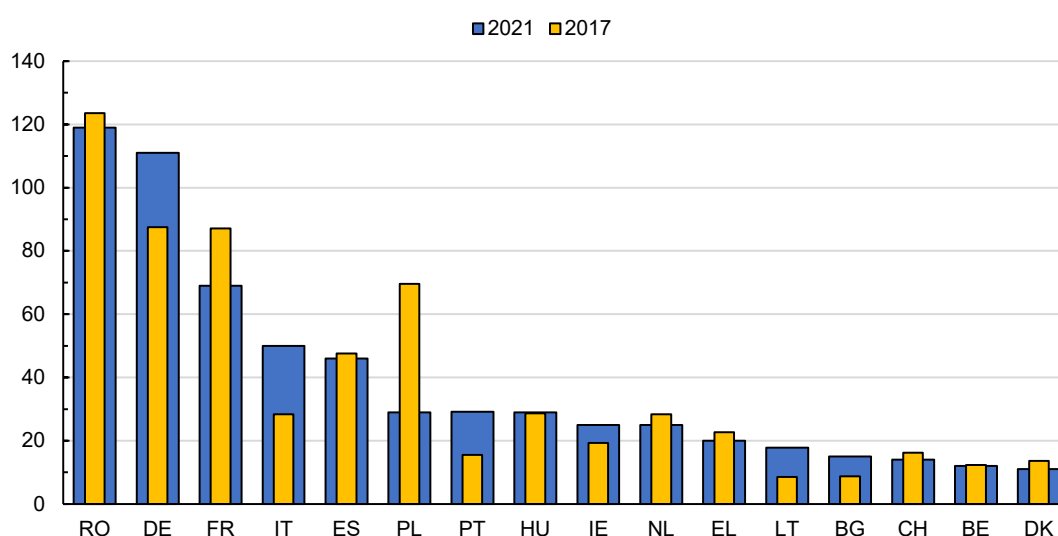
⁸⁸ The total number of PDs A1 issued by sending Member State in 2018-2022 are shown in Annex C.1.

**Table 8: Returning nationals for the largest countries of return
(1 000s), 2017-2021**

	2017	2018	2019	2020	2021	2020/2021 Change (%)	Trend
Returning nationals (1 000s)							
EU-27	655	678	721	589	656	11	
RO	124	118	136	92	119	29	
DE	88	108	115	108	111	2	
FR	87	89	89	56	69	23	
IT	28	31	46	37	50	35	
ES	48	52	53	34	46	36	
PL	70	54	50	34	29	-16	

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

Comparing the number of returnees at country level between 2017 and 2021 (Figure 18) shows large disparities. Throughout the period, the proportionally largest increases in return mobility can be seen in Lithuania (107%), followed by Portugal (88%), Italy (76%) and Bulgaria (71%). On the other hand, as indicated above, Poland shows the largest decrease in return mobility, in percentages (-58%) as well as absolute numbers (- 40 000). Significant declines can also be seen in France (-21%), Denmark (-19%), Switzerland (-14%), the Netherlands (-12%) and Greece (-12%) between 2017 and 2021.

Figure 18: Returning nationals by country of return (1 000s), 2017 and 2021⁸⁹

Note: Only countries with at least 10 000 returnees in 2021 are shown.

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

⁸⁹ The number of returnees is shown annually for 2020-2021 for each country in Table 26 in Annex C.1.

3 The labour market integration of mobile workers

3.1 Introduction

This chapter focuses on the integration of nationals, EU movers and third-country nationals in 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 2022, rates of activity, employment and unemployment for nationals, EU movers and third-country nationals have all surpassed the 2021 levels and continued the trends prior to the outbreak of the COVID-19 pandemic in 2020.
- EU movers have a higher activity rate as well as employment rate – by a smaller margin – than nationals. Third-country nationals have significantly lower employment and activity rates than both movers and nationals, continuing the patterns from previous years.
- The share of self-employed EU movers has returned to a level just below pre-pandemic levels. Nationals have a higher level of self-employment, which has remained relatively steady throughout the years. EU movers and third-country nationals have a consistently higher employment on both fixed-term and part-time contracts than nationals, although these have declined for all groups.

Participation of movers in the labour market

- At the EU level, 83% of EU movers were active on the labour market, compared to 80% of nationals and 71% of third-country nationals. For movers, this constitutes an increase of 2 pps compared to 2021, and an absolute increase of ca. 450 000 (from 6.5 million to almost 7 million individuals).
- In 2022, EU movers have an employment rate of 77%, surpassing nationals at 75%. This is a return to pre-pandemic patterns of movers having slightly higher engagement in the labour market. The employment rate of third-country nationals is lower at 62%, but this is nevertheless an increase of 3 pps compared to 2021.
- In 2022, EU movers had an unemployment rate of 7%. This is higher than nationals (5%) but lower than third-country nationals (13%). Compared to both 2017 and 2021, the unemployment rate has decreased in all three groups.
- The highest reliable employment rates of EU movers are found in Cyprus (85%), the Netherlands (85%), Switzerland (83%), and Germany (81%). The lowest (reliably computable) employment rates are found in Greece (57%) and Italy

(68%). These two countries also have the lowest employment rate of nationals in the EU.

- There are 560 000 self-employed EU movers in 2022, which is an increase of 22% compared to 2021. This number is still lower than before the COVID-19 pandemic and the share of self-employed movers (9%) is lower than the share of self-employed nationals (14%). Self-employed movers are highly concentrated: 31% work in Construction and 12% in Accommodation and food services.
- In 2022, 15% of movers and 12% of nationals had fixed-term employment contracts. Third-country nationals have fixed-term contracts at a significantly higher rate (25%). A similar pattern, although with smaller differences between the nationality groups, is found for the proportion of part-time work.

Characteristics of mobile workers in employment

- At the EU level, the employment rate of female movers is 14 percentage points lower than that of male movers. This is slightly above the gap observed for nationals and well below the 26-percentage-point difference between female and male third country nationals.
- The gender gap increases to 28 percentage points when looking at part-time EU workers, well above the 20-percentage-point difference observed for nationals. A lower employment rate and a higher prevalence of part-time work among female movers, compared to their male counterparts, suggests potential integration challenges for women in the host country's labour market.
- For EU movers, nationals, and third-country nationals alike, 35-49-year-olds have the highest employment rate on an EU level. Those aged 20-34 have the highest unemployment rate and, reflecting e.g. retirement, 50-64-year-olds have the lowest activity rate.
- The proportion of EU movers with high education attainment⁹⁰ stands at 32% in 2022, up from 29% in 2017. This is at a similar level to nationals. The proportion of third-country nationals with high educational attainment has also increased over time and stands at 25% in 2022. 29% of EU movers have low educational attainment, compared to 18% of nationals and 45% of third-country nationals.
- The most common occupations among movers on an EU level are Elementary occupations (19%), Professionals (18%) and Service and sales workers (16%). Both movers and third-country nationals are overrepresented relative to nationals in Elementary occupations, Service and sales workers, and Craft and related trades.
- The largest sector of work for movers is Manufacturing (16%). Relative to nationals, EU movers are most overrepresented in Accommodation and food services, Construction, and Administrative and support service activities. The highest growth is observed in the Information and Communication (+56%) and Transportation and storage (+40%) sectors.

⁹⁰ 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).

3.2 Participation of movers in the labour market

This section compares and analyses the labour market integration of nationals, EU movers and third-country nationals. This is done over three sub-sections. The first compares activity, employment, and unemployment rates⁹¹ on an EU level in 2017-2022, and in individual countries in 2022. 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.

3.2.1 Activity, employment, and unemployment rates

Comparison of activity rates

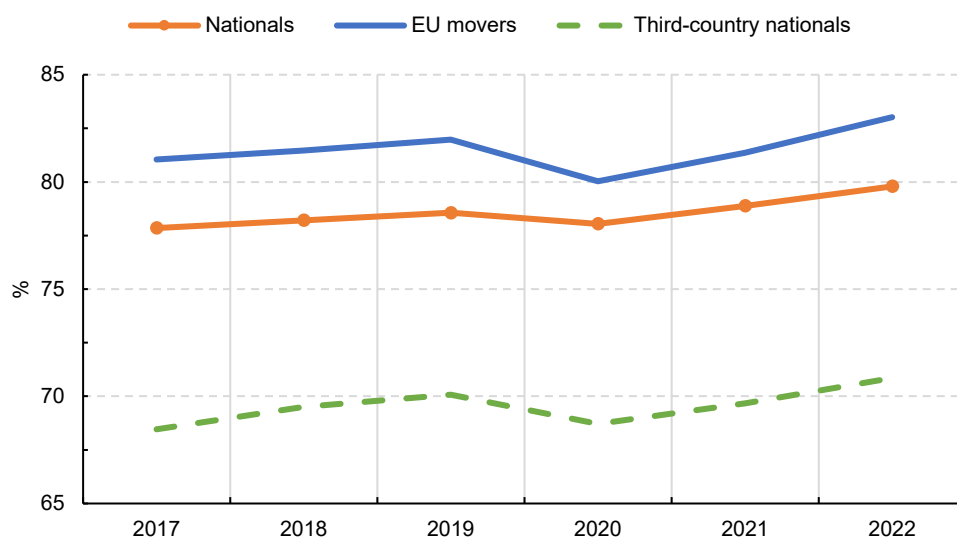
EU movers have outperformed both nationals and third-country nationals in terms of activity rates from 2017 to 2022 (Figure 19)⁹². EU movers have not only recovered but have also exceeded their pre-pandemic activity rates, reaching impressive 83% in 2022. In comparison, nationals reached a new peak of 80% in 2022, while third-country nationals showed notable improvement but remained below the pre-pandemic level, with an activity rate of 71%.

In all but three Member States – France, Germany, and Greece – EU movers have higher activity rates than nationals (Figure 20), even if this difference is only a few percentage points in most Member States. The picture is more mixed for third-country nationals, who have slightly higher activity rates than nationals in eight Member States (Poland, Malta, Portugal, Lithuania, Luxembourg, Czechia, Italy, and Slovenia), but otherwise have lower (and often significantly lower) activity rates.

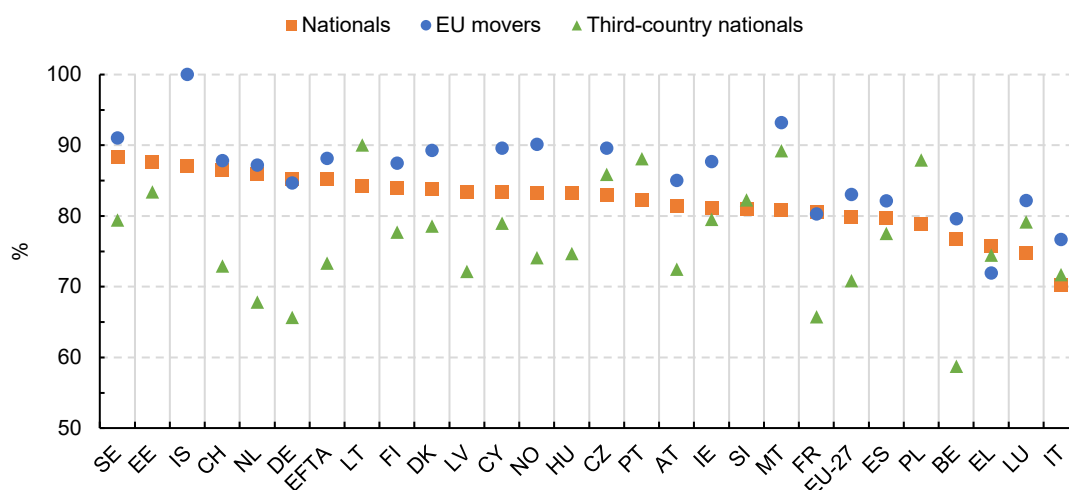
The ability of Member States to integrate recent movers, i.e. persons who have spent one year or less in that Member State, into their labour market can be a determining factor in their future activity status. Participating in employment or labour market programmes and more generally active labour market policies may assist movers in their integration into their new country of residence.

⁹¹ For definitions of these terms, cf. the 'Definitions' table in the preamble to this report.

⁹² 'Activity rate' is to be understood, here and elsewhere in the report, as the proportion of working age movers who are either employed or unemployed/looking for work. This is to be contrasted with those who are inactive or outside of the labour market due to e.g. retirement, education, or long-term sick leave.

Figure 19: Activity rate of movers in the EU, 2017-2022⁹³

Source: EU-LFS 2022, custom extraction by Milieu.

Figure 20: Activity rate of movers in EU and EFTA countries, 2022

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 Denmark, Finland, Iceland, Ireland, Malta, Norway, and Sweden; and for third-country nationals in Czechia, Hungary, Ireland, Latvia, Lithuania, Norway, Poland, and Slovenia.

Source: EU-LFS 2022, custom extraction by Milieu.

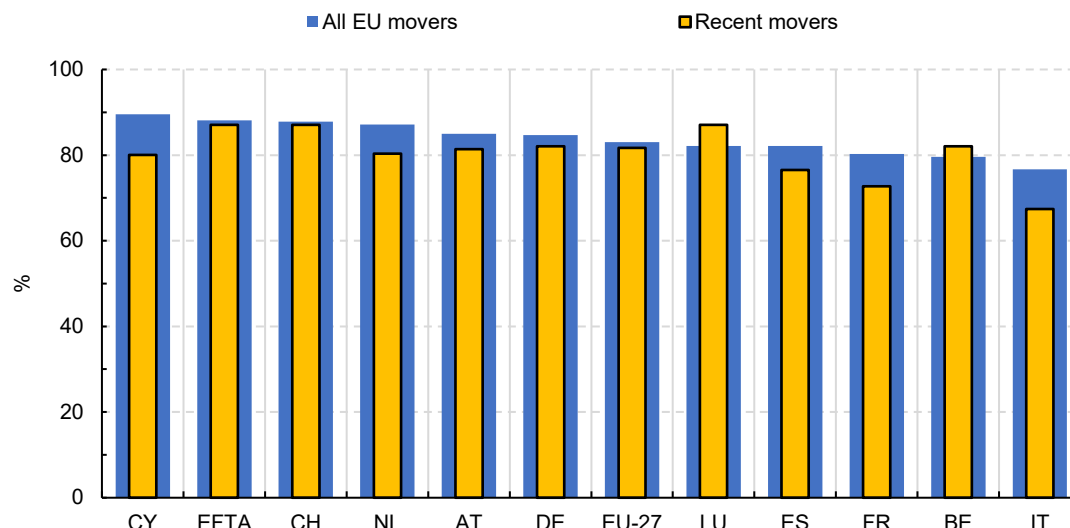
Recent movers in the EU have an average activity rate of 82% (Figure 21)⁹⁴. Luxembourg and Belgium report higher activity rates for recent EU movers than for all EU movers, with a difference of 5 and 3 percentage points, respectively. There are five Member States where recent movers have an activity rate that is more than 5 percentage points lower than movers overall: Cyprus (9 pps), Italy (9 pps), France (8 pps), the Netherlands (7 pps), and Spain (6 pps). Conversely, Switzerland shows the smallest disparity, with less than 1 percentage point difference, at around 87-88%. These differences can be due to a range of factors including the demographic and socio-economic profile of movers, the needs of the local

⁹³ Activity rates by nationality group and country of residence in 2017-2022 are shown in Table 32 in Annex C.2.

⁹⁴ 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. Eurostat thresholds mean that sample sizes 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.

labour market and the economic conditions in the host countries, as well as the availability of social support.

Figure 21: Activity rate of overall and recent movers in EU and EFTA countries, 2022



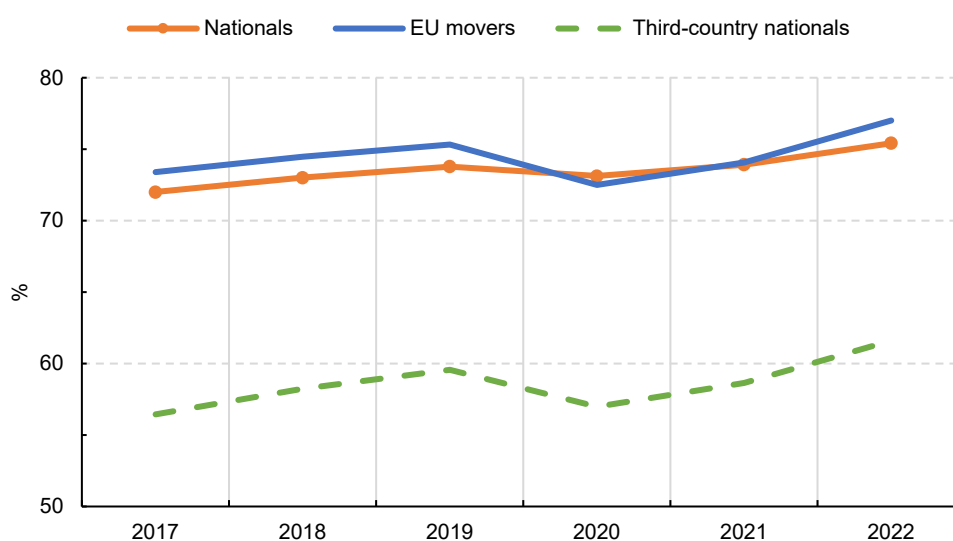
Note: 'Recent movers' are defined as those who have spent 1 year or less in the Member State. The figure only shows Member States where data allowed for a comparison of recent movers and movers in line with Eurostat publication thresholds. Low reliability for Austria, Belgium, Cyprus, EU-27, France, Germany, Italy, Luxembourg, the Netherlands, and Spain.

Source: EU-LFS 2022, custom extraction by Milieu.

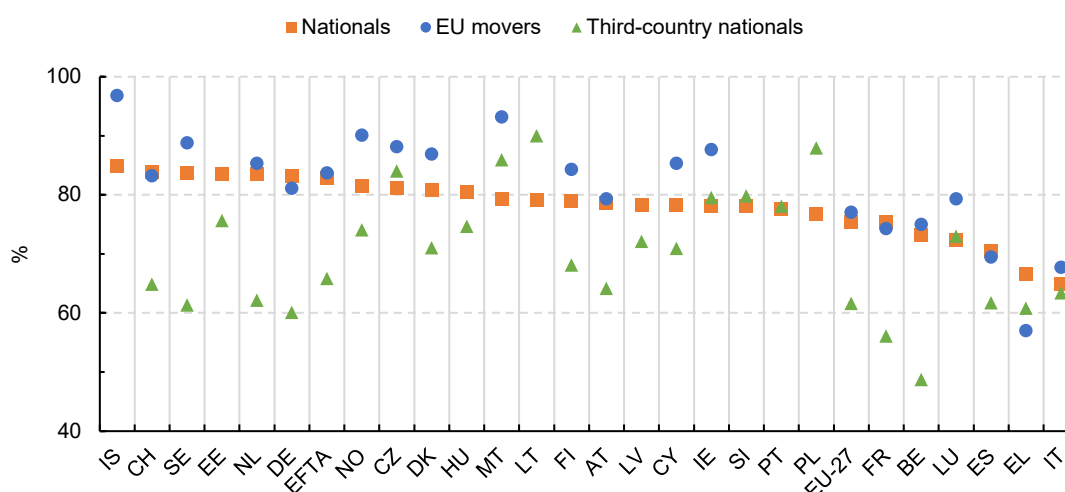
Comparison of employment rates

EU movers have the highest employment rate, reaching an impressive 77% in 2022 (Figure 22), compared to nationals (75%) and third-country nationals (69%). Notably, the employment rate of EU movers has exhibited overall growth since 2017, despite a dip in 2020 due to COVID-19, surpassing pre-pandemic levels in 2022. Nationals have, at a slightly lower level, also seen improvements in their employment rates. In contrast, third-country nationals have the lowest employment rate among the three groups.

In the majority of countries (Figure 23) EU movers generally have better employment outcomes compared to both nationals and third-country nationals. The greatest differentials between EU movers and nationals are in Malta, Iceland, and Ireland, where the former group has employment rates of 14, 12, and 10 percentage points higher than the latter, respectively. When it comes to third country nationals, the most notable disparities are found in Sweden, Belgium, the Netherlands, and Germany, with EU movers boasting employment rates over 20 percentage points higher than third country nationals, reaching almost 30 percentage points in Sweden. This trend held true in all but five countries, namely Greece, Germany, France, Spain, and Switzerland, where nationals outperformed EU movers in terms of employment rates. In Greece, third country nationals also outperformed EU movers.

Figure 22: Employment rate of movers in the EU, 2017-2022⁹⁵

Source: EU-LFS 2022, custom extraction by Milieu.

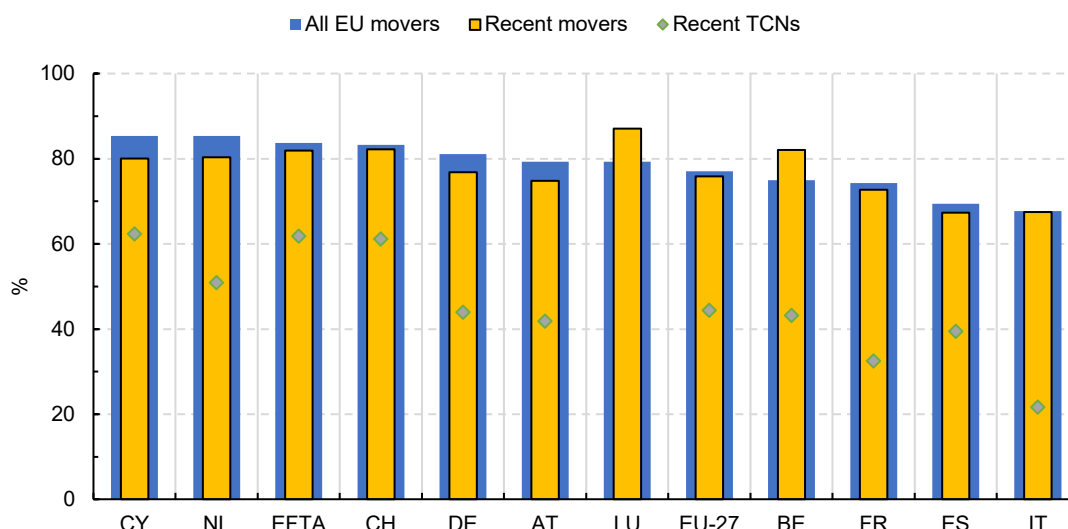
Figure 23: Employment rate of movers in EU and EFTA countries, 2022

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. Data not available for Bulgaria, Croatia, Romania, and Slovakia. Low reliability for EU movers in Czechia, Denmark, Finland, Iceland, Ireland, Malta, Norway, and Sweden; and for third-country nationals in Czechia, Hungary, Ireland, Latvia, Lithuania, Norway, Poland, and Slovenia.

Source: EU-LFS 2022, custom extraction by Milieu.

Recent movers generally have a lower employment rate than movers overall, but differences are often small (around 1 percentage point at EU level) (Figure 24). As in the case of activity rates, Luxembourg (+8 pps) and Belgium (+7 pps) are the only Member States that have higher employment rates of recent movers compared to movers overall. Moreover, notable differences are observed when comparing employment levels of recent movers with those of recent third-country nationals; the latter group has significantly lower employment rates in the first year of settling. At the EU level, this disparity amounts to 31 pps, whereas the differences fluctuate per Member State with available data between an upper bound of 46 pps in Italy to a lower bound of 18 pps in Cyprus. However, these figures should be interpreted cautiously due to low reliability levels, and the fact that a lack of detailed data prevents deeper analysis.

⁹⁵ Employment rates by nationality group and country of residence in 2017-2022 are shown in Table 33 in Annex C.2.

Figure 24: Employment rate of overall and recent movers in EU and EFTA countries, 2022

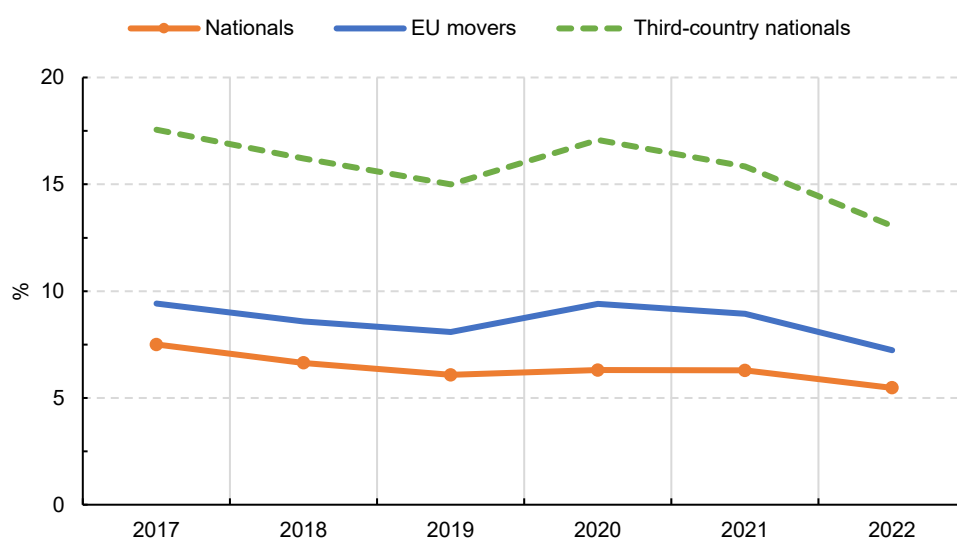
Note: 'Recent movers' and 'Recent TCNs' are defined as those who have spent 1 year or less in the Member State. The figure only shows Member States where data allowed for a comparison of recent movers and movers overall in line with Eurostat publication thresholds. Low reliability for EU movers in Czechia, Denmark, Finland, Iceland, Ireland, Malta, Norway, and Sweden; recent movers in Austria, Belgium, Cyprus, EU-27, France, Germany, Italy, Luxembourg, the Netherlands, and Spain; and recent TCNs in Austria, Belgium, and France.

Source: EU-LFS 2022, custom extraction by Milieu.

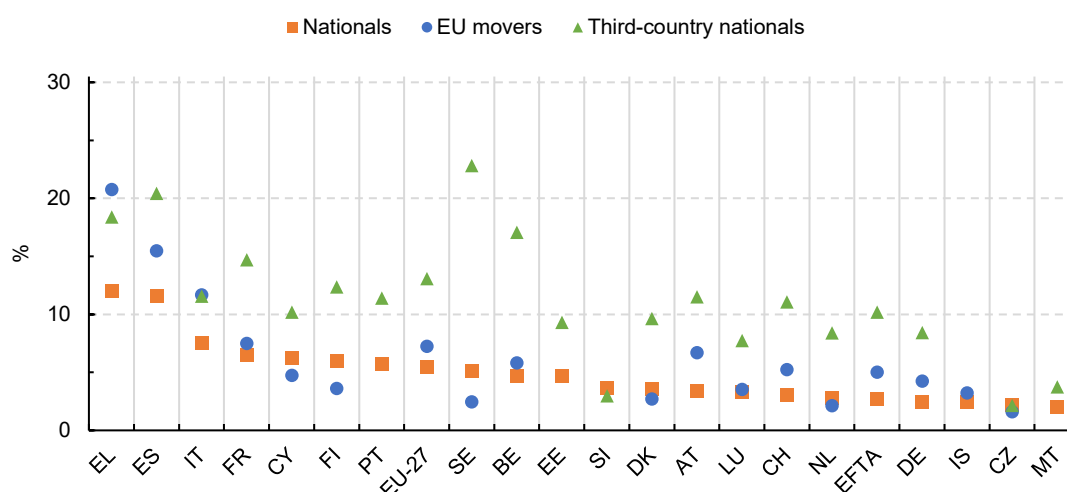
Comparison of unemployment rates

Following the substantial increase during the pandemic, the unemployment rate of EU movers decreased to 7% in 2022 below the pre-pandemic level (Figure 25). The unemployment rate for nationals was at 5% in 2022. In 2021 and 2022 EU movers have made significant progress in closing the gap with nationals, demonstrating their resilience and adaptability. Third-country nationals have also made positive progress in tackling unemployment challenges, although their rate is still higher than that of EU movers and nationals at 13%.

Looking at national specificities, the highest unemployment rate for EU movers is found in Greece (21%), Spain (15%) and Italy (12%). Those countries have also the highest unemployment rate among nationals (12%, 12% and 7%, respectively), and show the highest differential between unemployment rates of EU movers and nationals (9pps in Greece and around 4pps in Spain and Italy) (Figure 26). Compared to third-country nationals, EU movers have lowest unemployment rates in Sweden (-20 pps), Belgium (-11 pps), and Finland (-8 pps). Due to a lack of available data, no comparison of the unemployment rate of recent movers is possible.

Figure 25: Unemployment rate of movers in the EU, 2017-2022⁹⁶

Source: EU-LFS 2022, custom extraction by Milieu.

Figure 26: Unemployment rate of movers in EU and EFTA countries, 2022

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 Czechia, Denmark, Finland, and Sweden; and for third-country nationals in Czechia and Slovenia.

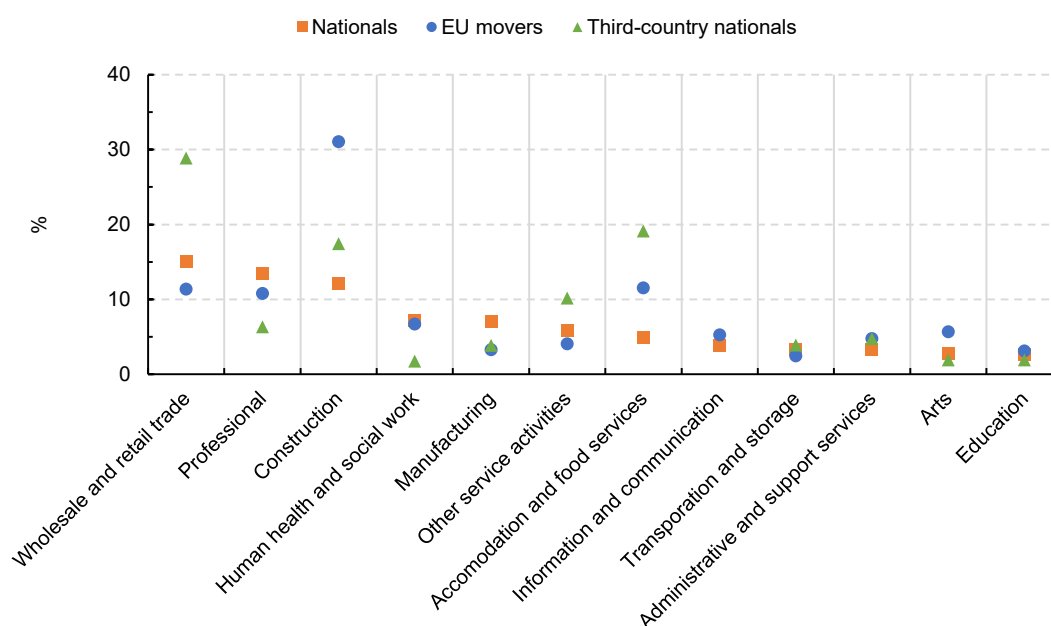
Source: EU-LFS 2022, custom extraction by Milieu.

3.2.2 Self-employment

Self-employment refers to a situation where an individual works independently as the head of their 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.

Self-employed movers are disproportionately found in sectors such as Construction (31%) and Accommodation and food services (12%) (Figure 27). Self-employed third-country nationals work frequently in these sectors (17% and 19%, respectively) and in the Wholesale and retail trade sector (29%).

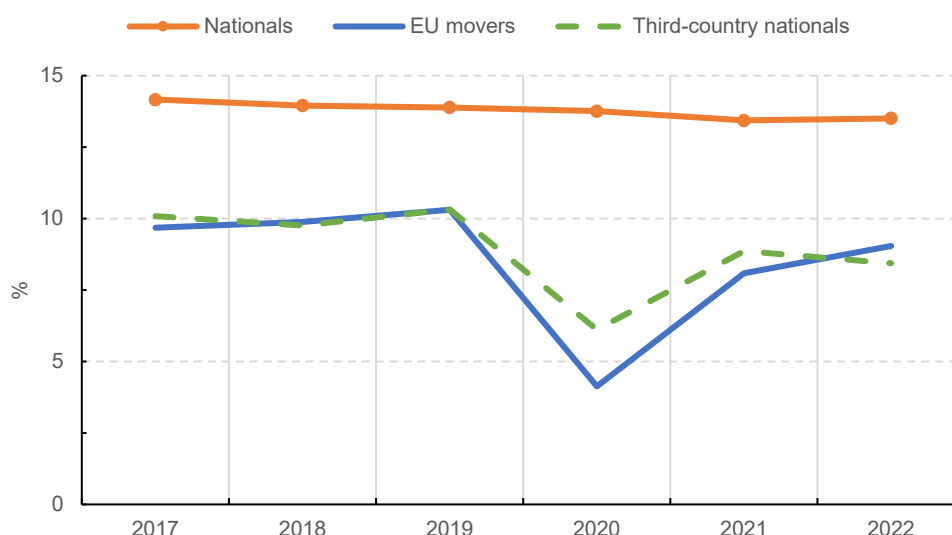
⁹⁶ Unemployment rates by nationality group and country of residence in 2017-2022 are shown in Table 34 in Annex C.2.

Figure 27: Self-employment of movers in the EU by sector of employment, 2022⁹⁷

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 2022, custom extraction by Milieu.

EU movers have shown intriguing dynamics in the context of self-employment at the EU level. In 2022, they have made significant strides in closing the gap with nationals that initially emerged in 2020, totalling 560 000 and representing a remarkable 22% rise compared to the previous year (Figure 28). This surge comes on the heels of a substantial drop in self-employed EU movers during the pandemic, while the share of self-employed workers among nationals remained relatively stable during that challenging period.

Figure 28: Self-employment of movers in the EU, 2017-2022⁹⁸

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.

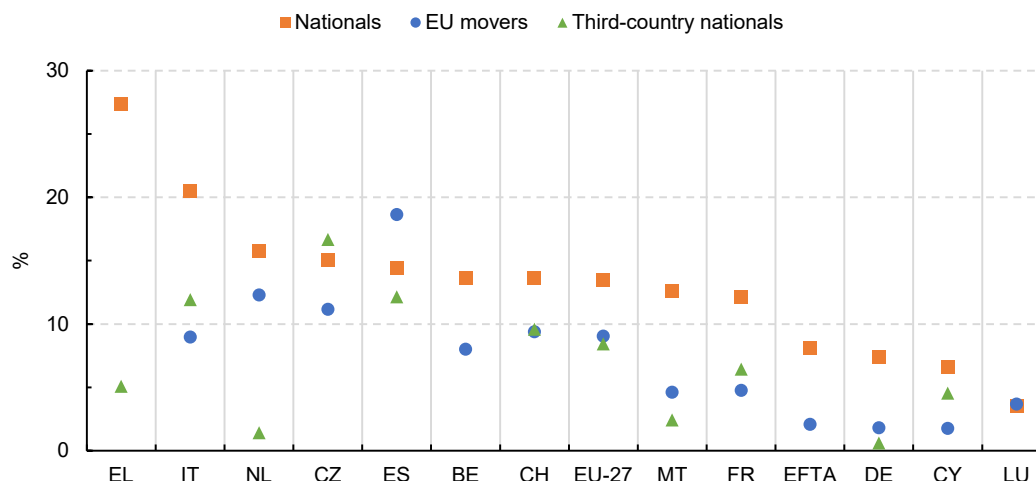
Source: EU-LFS 2022, custom extraction by Milieu.

⁹⁷ The proportions of self-employed workers by nationality group and sector in 2022 are shown in Table 36 in Annex C.2.

⁹⁸ The absolute numbers of self-employed by nationality group in 2017-2022 are shown in Table 35 in Annex C.2.

Looking at a country level, self-employment is generally more prevalent among nationals compared to EU movers in most countries (Figure 29). Two exceptions to this trend are found in Spain, where EU movers show a slightly higher propensity for self-employment, and Czechia, where a similar pattern emerges among third-country nationals.

Figure 29: Self-employment of movers in EU and EFTA countries, 2022⁹⁹



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 Belgium, Cyprus, Germany, and Malta; and for third-country nationals in Czechia, Germany, Greece, Malta, and the Netherlands.

Source: EU-LFS 2022, custom extraction by Milieu.

3.2.3 Contractual and working time arrangements

While employment and activity rates provide important insights on labour market integration, additional aspects are required to better understand the working conditions. 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’¹⁰⁰. However, it does not indicate other characteristics of their work, e.g. the number of worked hours or whether they have permanent positions. In order 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 third-country nationals.

Fixed-term contracts

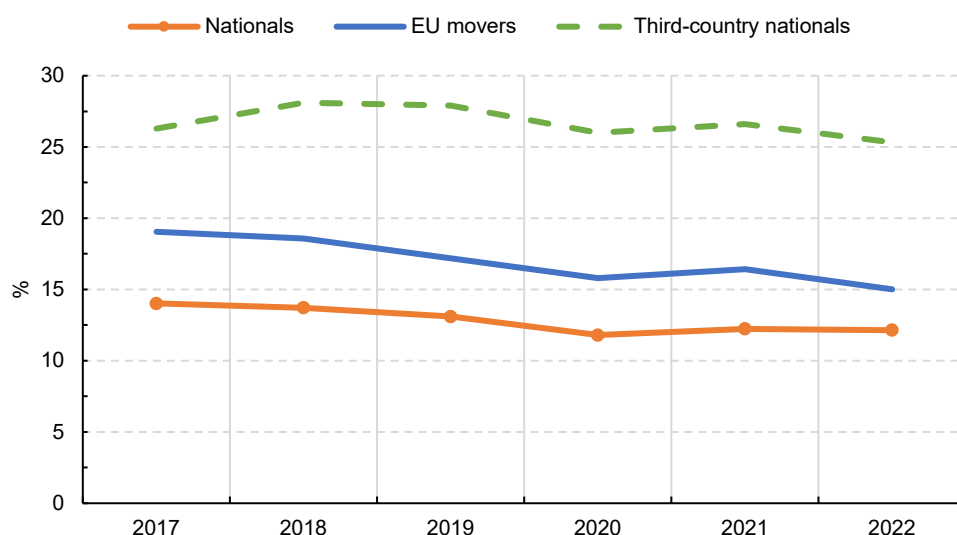
EU movers consistently display a higher occurrence of fixed-term (temporary) employment contracts compared to nationals (Figure 30). This gap was slowly closing since 2017 but encountered a temporary disruption during the COVID-19 pandemic. Between 2021 and 2022 the proportion of fixed-term contracts among EU movers continued to decline, reaching 15% in 2022, almost converging to the 12% rate for nationals. In contrast, the prevalence of temporary contracts among third-country nationals, although exhibiting a decrease, remains substantially higher, stabilizing at approximately 25%.

⁹⁹ The proportions of self-employed workers by nationality group and country of residence in 2022 are shown in Table 37 in Annex C.2.

¹⁰⁰ Pietschmann, et al. (2016), ‘Key Labor Market Indicators: Analysis with Household Survey Data’, International Labor Organization (ILO), Geneva, p. 13; International Labor Organization (ILO) (2022).

Several factors may explain the higher prevalence of fixed-term contracts among EU movers. For instance, they could be used as transitional arrangements while the worker establish themselves in the new environment of the host country. Fixed-term contracts may also offer both workers and employers greater flexibility making them more suitable for individuals who anticipate moving or working in various locations. In some cases, fixed term contract could also be used as a probationary period,¹⁰¹ which may be relevant when it comes to workers coming from different contexts and organisational environments.

Figure 30: Share of movers with fixed-term contracts in the EU, 2017-2022¹⁰²



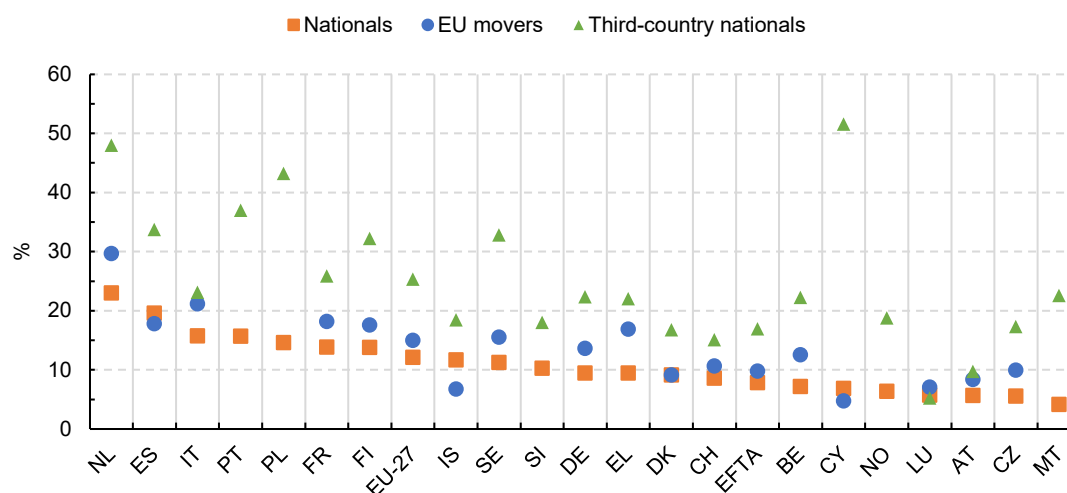
Source: EU-LFS 2022, custom extraction by Milieu.

In most countries, the EU-level trend is confirmed and the share of EU movers with temporary contracts lies in between that of nationals and third country nationals (Figure 31). However, there are exceptions in Iceland, Spain, and Cyprus, where nationals with temporary contracts are few percentage points higher than EU movers. Third-country nationals have consistently higher shares of fixed-term contracts, with the highest differentials between those of EU movers being in Cyprus (47 pps), the Netherlands (18 pps), and Sweden (17 pps).

¹⁰¹ Boockmann, B. and Hagen, T. (2008), Fixed-term contracts as sorting mechanisms : Evidence from job durations in West Germany, Vol. 15, Issue 5, pg. 984-1005.

¹⁰² Absolute numbers of fixed-term contracts by nationality group in 2017-2022 are shown in Table 38 in Annex C.2.

Figure 31: Share of movers with fixed-term contracts in EU and EFTA countries, 2022¹⁰³



Note: Only Member States where comparison is possible between nationals and at least one more group are included. Low reliability for EU movers in Greece.

Source: EU-LFS 2022, custom extraction by Milieu.

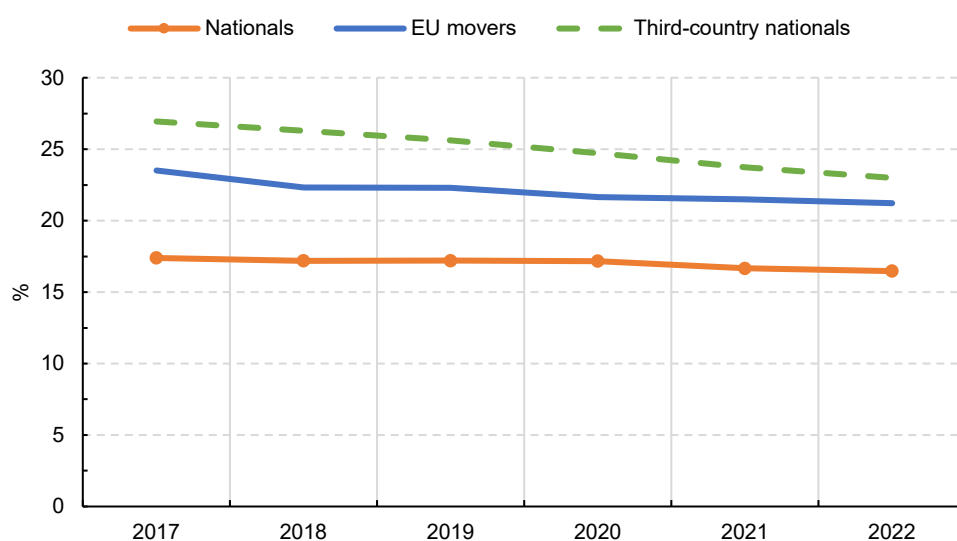
Part-time employment

The trend for part-time employment closely mirrors that of temporary contracts, albeit at a reduced scale. Figure 32 reveals that the shares of part-time employment have declined for all three groups in 2022. On the whole, both EU movers (21%) and third-country nationals (23%) continue to maintain a proportionately higher share of part-time employment compared to nationals (16%). However, the higher prevalence of part-time work of EU movers is caused by the situation in two Member States only, Italy and France (see Figure 33). In all other Member States and in the EFTA countries, part time work is more popular among nationals than EU movers.

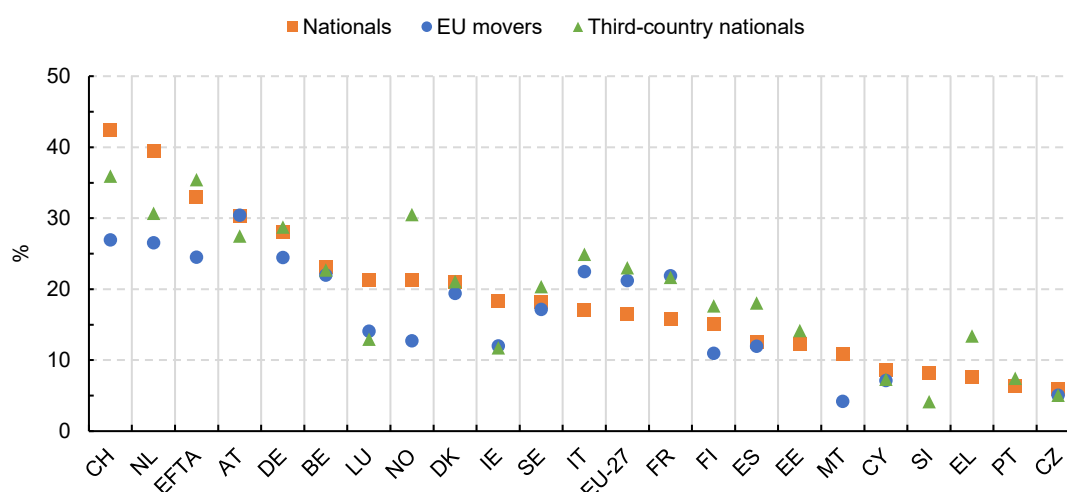
At national level, with the exception of Italy and France, most Member States have significantly higher rates of part-time employment among nationals than movers in 2022 (Figure 33). The highest differentials are in Switzerland, where part-time employment is 15 percentage points higher among nationals than EU movers, and the Netherlands (13 pps). Part-time employment is often used as a way to combine employment with family duties and is often highly gendered. In the case of the Netherlands, for instance, 60% of women in the country are working part-time. This is three times the OECD average for women and over three times the rate for Dutch men¹⁰⁴.

¹⁰³ The number and share of fixed-term contracts by nationality group and country of residence in 2022 are shown in Table 39 in Annex C.2.

¹⁰⁴ OECD (2019), 'Part-time and Partly Equal: Gender and Work in the Netherlands', *Gender Equality at Work*, OECD, Paris. Gendered patterns of part-time work are further discussed further down in this section.

Figure 32: Share of movers with part-time employment in the EU, 2017-2022¹⁰⁵

Source: EU-LFS 2022, custom extraction by Milieu.

Figure 33: Share of movers with part-time contracts in EU and EFTA countries, 2022¹⁰⁶

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 Malta; and for third-country nationals in Portugal and Slovenia.

Source: EU-LFS 2022, custom extraction by Milieu.

3.3 Characteristics of mobile workers in employment

This section investigates how various demographic and socio-economic factors influence the employment rates of nationals, movers, and third-country nationals. Demographically, it focuses on the country of origin, gender, and age group. It also takes into account the educational level of movers and the occupations and sectors in which they are occupied.

¹⁰⁵ The absolute numbers of part-time contracts by nationality group in 2017-2022 are shown in Table 40 in Annex C.2.

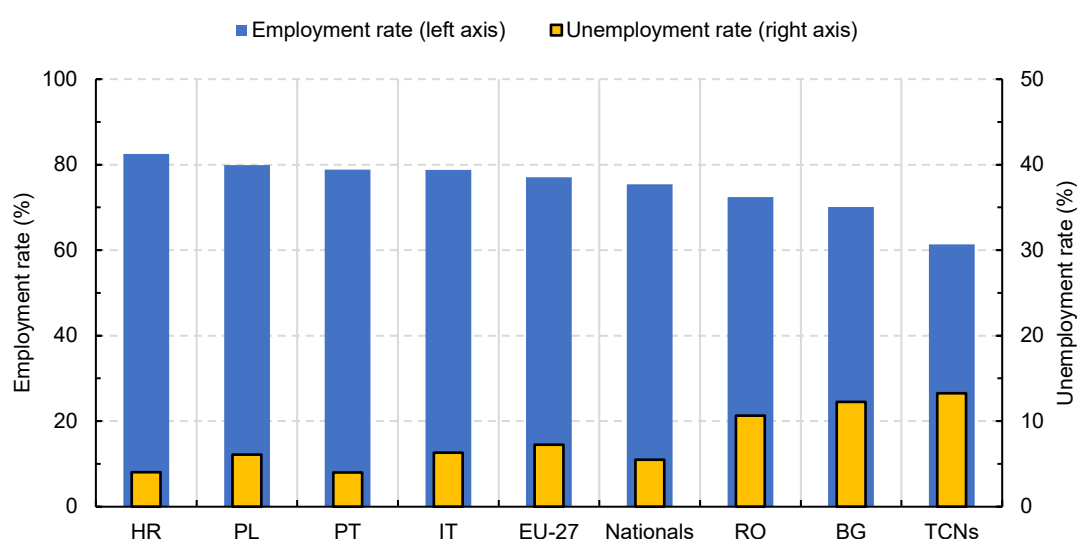
¹⁰⁶ The number and share of part-time contracts by nationality group and country of residence in 2022 are shown in Table 40 and Table 41 in Annex C.2.

3.3.1 Demographic factors

Employment and unemployment rate by country of origin

As shown in Section 3.2.1, the employment rate of different nationality groups varies significantly between Member States. Accordingly, Figure 34 shows the employment and unemployment rate for the largest nationality groups among EU movers¹⁰⁷. For instance, Croatian movers have an employment rate of 83% and an unemployment rate of 4%. For EU movers as a whole and those with nationalities from Croatia, Poland, Portugal, and Italy, employment rates are consistently higher than for nationals.

Figure 34: Employment and unemployment rates of movers from selected countries, of TCN and EU average, 2022



Note: E.g. Movers of Croatian nationality had a lower unemployment rate, and higher employment rate, compared to all EU movers ("EU-27" in the graph) as well as relative to the national working age population in the EU ("Nationals" 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 2022, custom extraction by Milieu.

Employment rate by gender

Improving the integration of women in the labour market, thereby increasing both lifetime earnings and overall autonomy, is a recurring goal in EU employment strategy and has been reflected most recently in the goals of the 2021-2027 Action plan on Integration and Inclusion¹⁰⁸, the European Pillar of Social Rights action plan¹⁰⁹, and the 2020-2025 Gender Equality Strategy¹¹⁰. Additionally, progress on labour market integration – among other goals – is annually monitored in the report on gender equality in the EU¹¹¹. The issues surrounding women's participation in the labour market and the challenges they face are thus well mapped, and have a prominent place on the policymaking agenda.

¹⁰⁷ Due to Eurostat publication thresholds, comparable data is only available for a few nationalities in addition to the aggregate nationality groups.

¹⁰⁸ European Commission, COM(2020)758 on the Action plan on Integration and Inclusion 2021-2027.

¹⁰⁹ European Commission (2021), European Pillar of Social Rights action plan, Luxembourg: Publications Office of the European Union.

¹¹⁰ European Commission, COM(2020)152 on A Union of Equality: Gender Equality Strategy 2020-2025.

¹¹¹ For the most recent edition, cf. European Commission (2023), '2023 report on gender equality in the EU', European Commission (DG JUST), Brussels.

At the EU level, EU movers exhibit a larger gender employment gap when compared to nationals, although it is lower than that observed among third-country nationals (Table 9). This pattern persists despite improvements in the labour market for both males and females. Indeed, the gender employment gap has remained relatively stable since 2017, with a slight decrease in 2022. During that year, it stood at 14 pps for EU movers, 10 pps for nationals, and 26 pps for third country nationals.

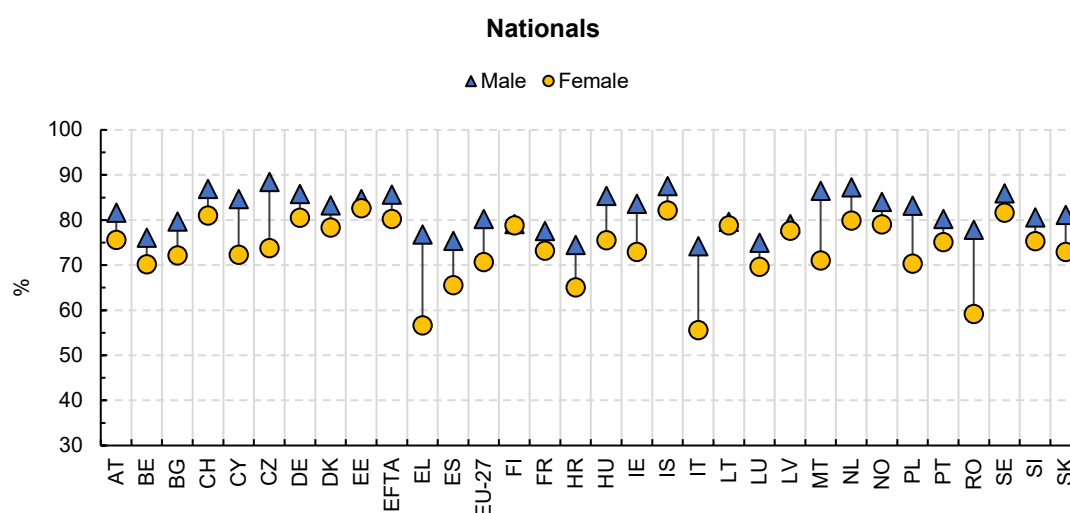
Table 9: Employment rates of different groups in the EU by gender (in %), 2017-2022¹¹²

	Gender	2017	2018	2019	2020	2021	2022
Nationals	Female	66	68	68	68	69	71
	Male	78	79	79	78	79	80
	Difference (pps)	11	11	11	11	10	10
EU movers	Female	66	67	68	65	66	70
	Male	81	83	83	80	82	84
	Difference (pps)	15	16	15	15	16	14
Third-country nationals	Female	46	47	47	45	47	49
	Male	67	70	72	70	71	75
	Difference (pps)	22	23	25	25	24	26

Source: EU-LFS 2022, custom extraction by Milieu.

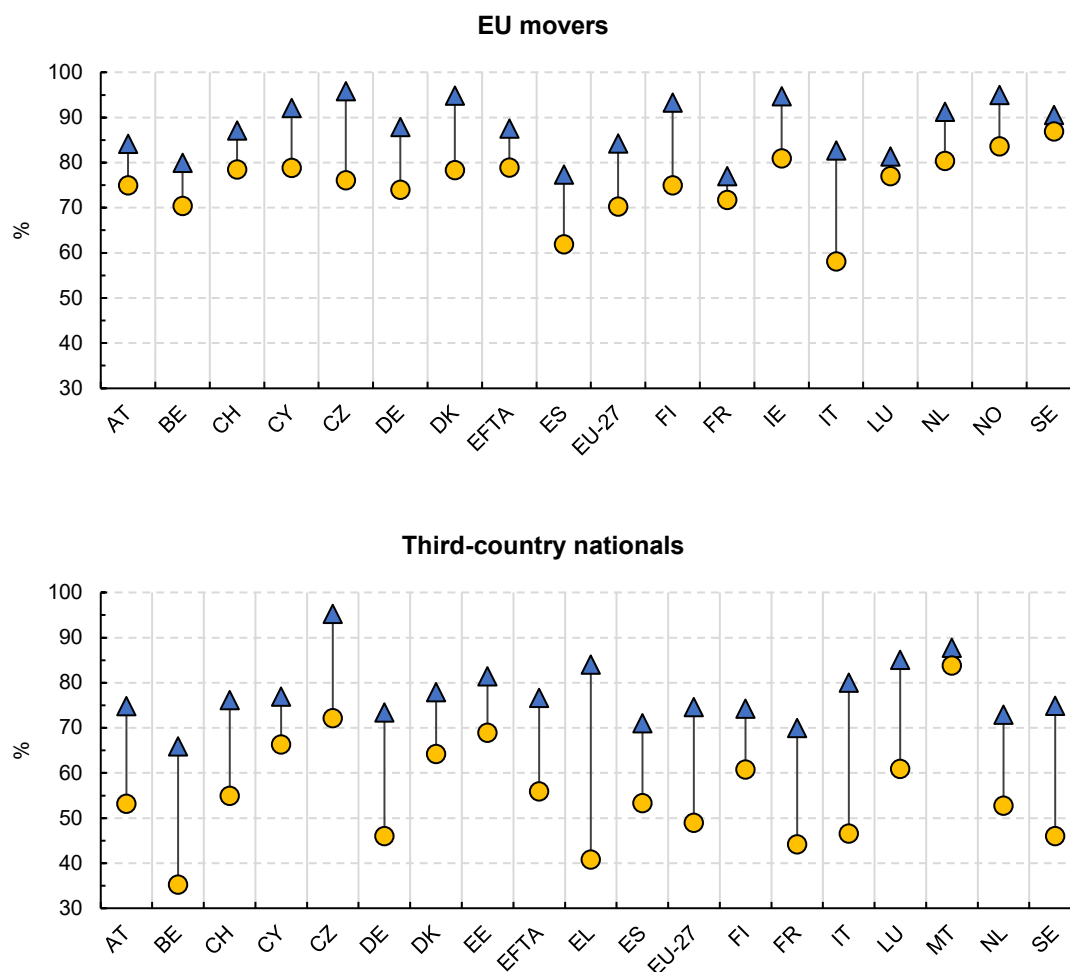
At national level, there are significant differences in employment rates between male and female EU movers (Figure 35). Italy and Czechia have the largest gender employment rate gap between male and female movers (25 and 20 pps, respectively). Together with the finding that Italy is one of the countries with a greater flow of women among EU movers (as seen in Section 2.3.2), this may indicate that women face significant challenges in accessing employment opportunities in the countries of destination. This trend mirrors patterns among Italian (and to a lower extent Czech) nationals, where there is also a substantial gap between employment rates of male and female nationals. In other countries, such as Luxembourg (4 pps) and France (5 pps), the gender gap between male and female movers is rather small.

Figure 35: Employment rate of movers in EU and EFTA countries by gender, 2022¹¹³



¹¹² For the employment rate of male and female EU movers in EU and EFTA countries (2016-21): see Table 42, Annex C.2.

¹¹³ For the employment rate of male and female EU movers in EU and EFTA countries (2017-22) see Table 42, Annex C.2.

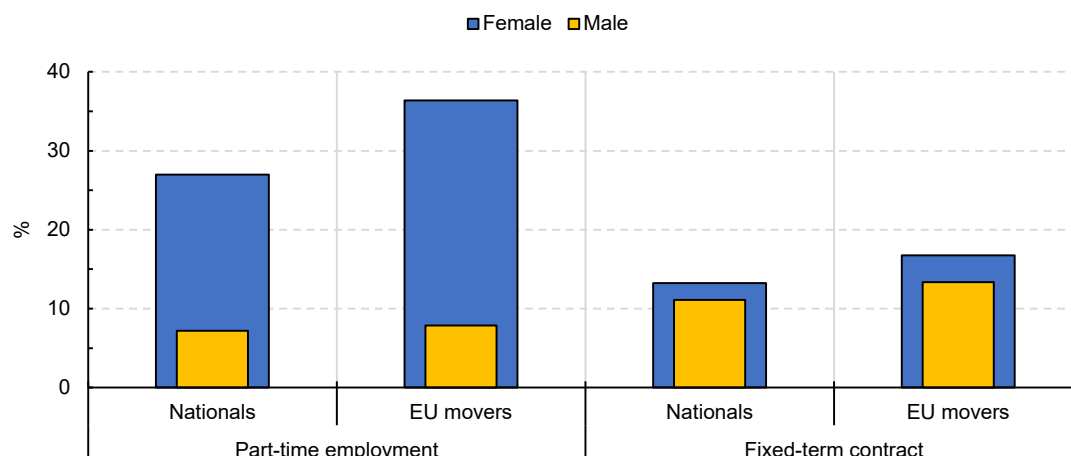


Note: Low reliability for female **EU movers** in Czechia, Denmark, Finland, Ireland, Malta, Norway, and Sweden; and males in Cyprus, Czechia, Denmark, Finland, Iceland, Ireland, the Netherlands, Norway, and Sweden. Low reliability for female **third-country nationals** in Czechia, Estonia, Finland, Malta, and Slovenia; and males in Czechia.

Source: EU-LFS 2022, custom extraction by Milieu.

Significant differences can also be seen for the extent to which female and male workers are engaged in part-time and fixed-term employment (Figure 36). In the case for part-time work, 27% of employed female nationals and 36% of female movers do not work full-time, against 7 and 8% of male nationals and movers. The difference is smaller with regard to fixed term contracts, although still with a higher tendency for female workers.

The countries with the highest proportion of female movers working part-time are Switzerland (65%), the Netherlands (62%) and Austria (52%). The high prevalence of part-time employment among women in these countries may be explained by a range of factors including but not limited to flexible employment options, inefficiencies of some social policies such as childcare support and parental leave, strong labour markets with a demand for part-time work, and gender equality initiatives encouraging women, including movers, to enter or remain in the workforce through part-time employment.

Figure 36: Share of movers with part-time employment and fixed-term contracts in the EU by gender, 2022¹¹⁴

Source: EU-LFS 2022, custom extraction by Milieu.

Employment rate by age group

This section compares the level of labour market integration for movers in different age groups. These may differ for a variety of reasons, including for instance (for older movers) a lack of digital skills that are increasingly emphasised in the labour market or (for younger movers who may be more recent arrivals) a lack of connection to the local labour market. However, deeper analyses are beyond the scope of this chapter.

In all nationality groups the highest employment rate is found for individuals aged 35-49 years, and the lowest for those aged 50-64 years (Table 10). Activity rates are also lowest for the oldest age group, reflecting a larger proportion of individuals who have left the labour market due to e.g. retirement or illness.

Table 10: Employment, unemployment, and activity rates of movers in the EU by age group, 2022

Indicator		20 - 34 years	35 - 49 years	50 - 64 years
Nationals	Employment rate	72	85	69
	Unemployment rate	8	4	4
	Activity rate	78	89	72
EU movers	Employment rate	75	82	71
	Unemployment rate	8	6	8
	Activity rate	82	87	77
Third-country nationals	Employment rate	60	65	56
	Unemployment rate	14	13	13
	Activity rate	69	75	65

Source: EU-LFS 2022, custom extraction by Milieu.

¹¹⁴ For the proportion of male/female movers and nationals in part-time or fixed-term employment in 2022, see Table 42, Annex C.2.

3.3.2 Socio-economic factors

Education level

An individual's education level, understood as their highest attained formal education¹¹⁵, contributes to their ability to find employment as well as the kind of jobs that are available to them. Whether a mover has high, medium, or low educational attainment may therefore have a significant effect on their labour market integration.

Around one-third of movers and nationals have high education attainment in 2022, reflecting a slow but steady increase since at least 2017 (Table 12). The share of medium-skilled workers is notably going down for all groups, especially at a relatively faster rate for EU movers. This could suggest that EU mobility is seen as more short-term, and employers may be hesitant to bother about recognition of these qualifications for shorter stays. Among those with low educational attainment, nationals and third-country nationals report steady declines (though from a higher level for the latter), whereas EU movers show no significant change.

Table 11: Educational attainment of movers in the EU, 2017-2022

	2017	2018	2019	2020	2021	2022	Trend
Nationals (%)							
Low	21	20	19	19	18	18	
Medium	50	50	50	49	49	48	
High	29	30	31	32	33	33	
EU movers (%)							
Low	28	28	28	27	28	29	
Medium	43	42	42	40	39	38	
High	29	29	30	32	32	32	
Third-country nationals (%)							
Low	48	47	46	46	47	45	
Medium	31	30	30	30	29	30	
High	22	22	23	24	24	25	

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).

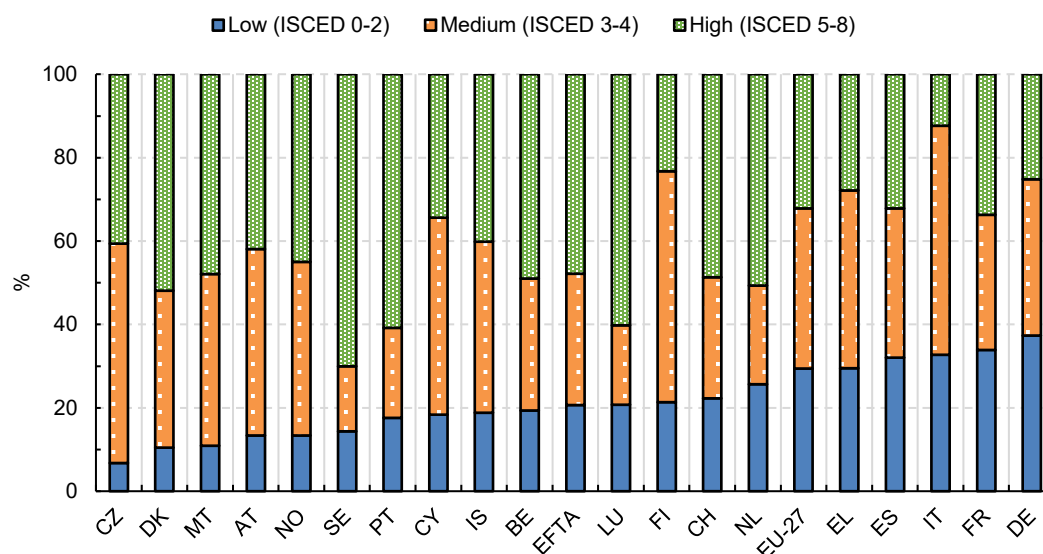
Source: EU-LFS 2022, custom extraction by Milieu.

There are wide disparities in educational attainment among EU movers across the EU Member States (Figure 37), with some countries reporting a higher prevalence of highly educated movers while others have a higher proportion with lower educational attainment. Five Member States (Germany, France, Italy, Spain, and Greece) have a higher proportion of movers with low educational attainment compared to the EU average. Czechia has the lowest proportion of movers with low educational attainment, thus resulting in a relatively high level of education among movers in that country. In Sweden, Portugal, Luxembourg, Denmark, and the Netherlands, more than half of all movers have a high level of education,

¹¹⁵ The terminology in this report follows the 2011 version of the International Standard Classification of Education (ISCED), as operationalised by Eurostat: '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 (2022d), 'International Standard Classification of Education (ISCED)', Eurostat, Luxembourg.

with Sweden having the highest proportion at 70%. Italy stands out with the lowest share of movers with a high level of education among the countries mentioned.

Figure 37: Educational attainment of movers by Member State, 2022

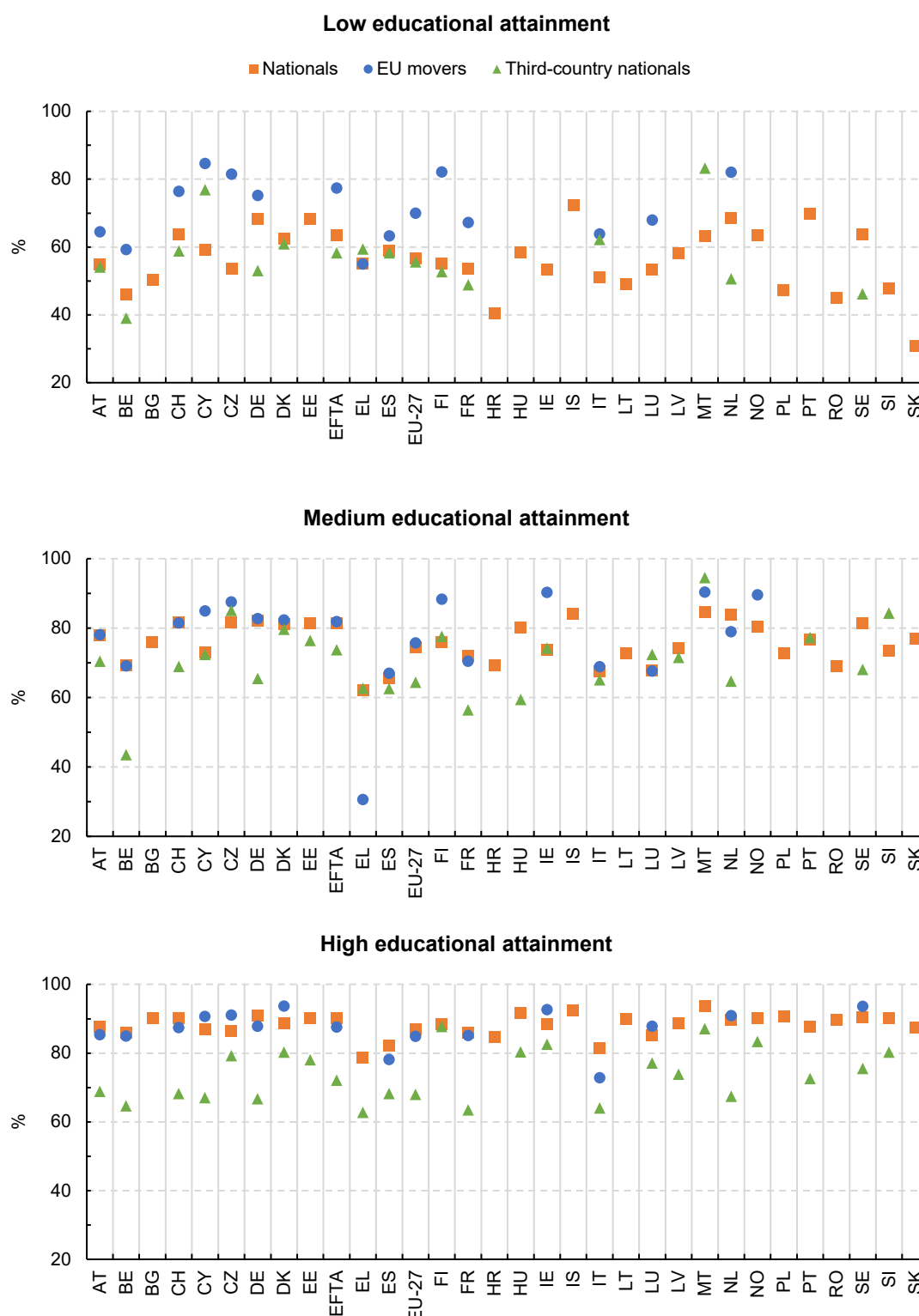


Note: The definition of the various levels of education attainment is provided under Table 12. Low reliability for Portugal (ISCED 0-4). Some Member States have been omitted due to missing data from one or more of the educational attainment categories.

Source: EU-LFS 2022, custom extraction by Milieu.

Some additional patterns emerge when comparing the employment rate of nationals, EU movers and third-country nationals by education attainment (Figure 38). EU movers with low education generally exhibit higher employment rates compared to their national counterparts in most EU countries. This pattern remains largely the same for individuals with medium educational attainment, with EU movers either having similar or higher employment rates as nationals. Among nationals, individuals with high educational attainment generally have very high levels of employment. However, movers in this education category have higher employment rates than nationals in Sweden, the Netherlands, Denmark, Ireland, Cyprus, Czechia, and Luxembourg.

Figure 38: Employment rate of movers in EU and EFTA countries by educational attainment, 2022¹¹⁶



Source: EU-LFS 2022, custom extraction by Milieu.

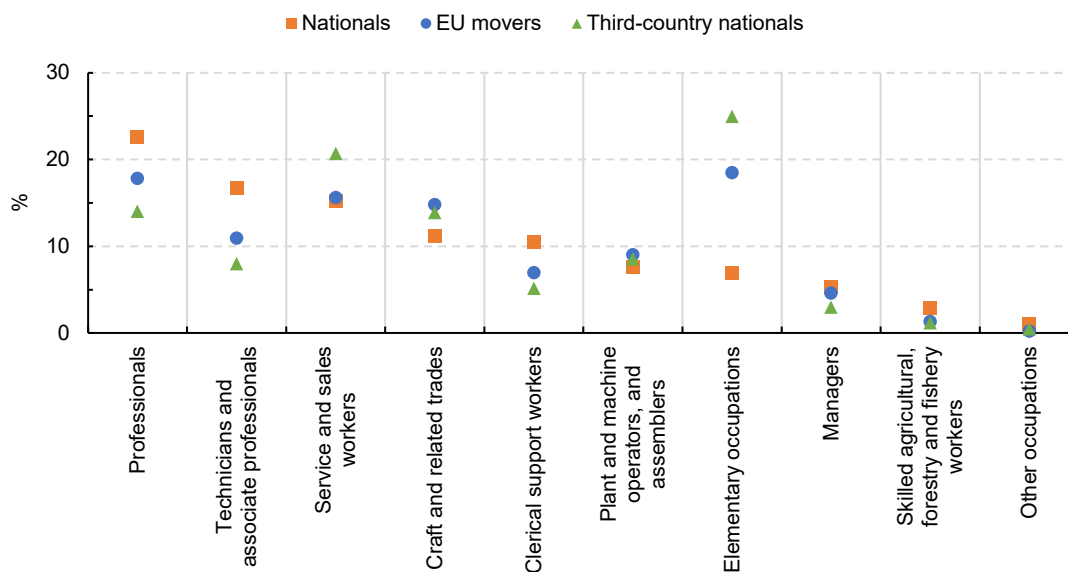
¹¹⁶ Low reliability for - **Low education:** nationals in Luxembourg, Norway and Slovenia; EU movers in Cyprus, Czechia, Finland, Greece, Luxembourg, and the Netherlands; and third-country nationals in Cyprus and Malta. **Medium education:** EU movers in Cyprus, Czechia, Denmark, Finland, Greece, Ireland, Luxembourg, Malta, the Netherlands, and Norway; and third-country nationals in Czechia, Denmark, EFTA, Estonia, Hungary, Ireland, Latvia, Luxembourg, Malta, the Netherlands, Portugal, and Slovenia. **High education:** nationals in Malta; EU movers in Cyprus, Czechia, Denmark, Germany, Ireland, the Netherlands, and Sweden; and third-country nationals in Czechia, Denmark, Estonia, Finland,

Occupations

An analysis of occupational representation reveals distinct patterns among different groups (Figure 39). EU movers exhibit an overrepresentation, particularly in Elementary occupations and Craft and related trades. There is a marginal overrepresentation in the categories of Service and sales workers and Plant and machine operators for EU movers. In contrast, nationals are notably overrepresented in roles such as Professionals, Technicians and associate professionals, Clerical support workers, and to a lesser degree, among Managers and Skilled agricultural workers when compared to EU movers. The situations observed for third-country nationals generally align with those of EU movers, but with some variations. Third-country nationals exhibit a more substantial overrepresentation in Elementary occupations and among Service and sales workers. Conversely, they are underrepresented in the more skilled categories of Professionals and Technicians and associate professionals. These findings are not surprising considering their overall educational profiles.

For EU movers the distribution across occupations has remained relatively steady over time (Table 13). During the COVID-19 pandemic and the ensuing restrictions on movement and business operations, significant declines were observed in all work categories except for Professionals¹¹⁷. This group, having a higher likelihood of transitioning to remote work situations, experienced a notable increase in the 2017-2022 period, amounting to approximately 39%.

Figure 39: Movers in the EU by occupation, 2022



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

Source: EU-LFS 2022, custom extraction by Milieu.

Greece, Hungary, Ireland, Latvia, Malta, Norway, Portugal, and Slovenia. For the exact shares for each level of educational attainment, nationality group and country see Table 43 in Annex C.2.

¹¹⁷ 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).

Table 12: Movers in the EU by occupation, 2017-2022

	2017	2018	2019	2020	2021	2022	Trend
Employed working-age movers (thousands)							
Elementary occupations	1174	1215	1252	1080	1089	1193	
Professionals	830	894	948	1021	1056	1151	
Service and sales workers	956	997	1026	909	926	1008	
Craft and related trades	911	978	975	864	899	955	
Technicians and associate professionals	560	610	665	629	631	707	
Plant and machine operators, and assemblers	488	519	552	504	538	583	
Clerical support workers	355	373	388	357	412	450	
Managers	231	245	273	225	262	297	
Skilled agricultural, forestry and fishery workers	91	99	99	86	89	87	

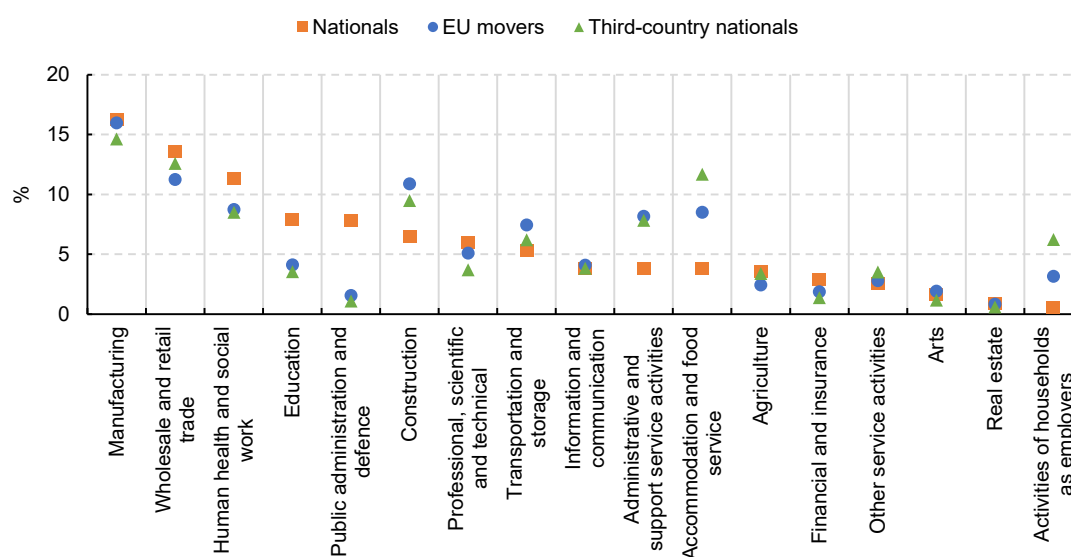
Note: Dots in the trend lines indicate the highest and lowest values in the reference period. Smaller sectors have been excluded from the table.

Source: EU-LFS 2022, custom extraction by Milieu.

Economic sectors

The distribution of EU movers by sector (Figure 40) remains similar in 2022 compared to previous years. Manufacturing remains the largest sector with 16% of all employed movers, followed by Wholesale and retail trade and Construction (both 11%). Relative to nationals, movers are most over-represented in Activities of households as employers, Accommodation and food service and Administrative and support service activities.

Finally, Table 14 looks at the number of movers in the seven sectors with the biggest relative change in the 2017-2022 period. Over time, the number of movers employed in relation to Activities of households as employers (e.g. maids, cooks, waiters, valets, butlers, laundresses, gardeners, gatekeepers, stable-lads, chauffeurs, caretakers, governesses, babysitters, tutors, secretaries etc.) has decreased by about one-third. On the other hand, the figures highlight significant increases in two sectors in particular, the first one being the Information and Communication sector, which has experienced a remarkable growth of 56%, indicating a rising demand for professionals in this field throughout the EU. A second sector is the Transportation and storage sector that has seen a substantial increase of 40%, suggesting expanding opportunities in the aftermath of the COVID-19 pandemic. These trends signify a shift in the composition of the labour market, with certain sectors experiencing significant growth while others witness a decline. The labour market integration of mobile workers will therefore partly depend on the extent that individuals will adapt to this transition e.g. by upskilling or retraining programs in sectors with growing opportunities like Information and Communication.

Figure 40: Movers in the EU by economic sector, 2022

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

Source: EU-LFS 2022, custom extraction by Milieu.

Table 13: Movers in the EU by economic sector, 2017-2022

	2017	2018	2019	2020	2021	2022	Trend
Employed working-age movers (thousands)							
Manufacturing	848	928	974	950	973	1019	
Human health and social work	449	473	511	528	524	558	
Administrative and support service activities	413	441	459	411	430	521	
Transportation and storage	339	371	418	355	419	476	
Professional	244	263	280	300	303	325	
Information and communication	166	186	195	205	223	260	
Activities of households as employers	314	308	287	245	212	202	
Other service activities	134	145	154	156	174	178	

Note: Dots in the trend lines indicate the highest and lowest values in the reference period. Only NACE1D sectors with significant differences in 2017-2022 are included.

Source: EU-LFS 2022, custom extraction by Milieu.

4 Fair intra-EU labour mobility and cross-border pensions

4.1 Introduction

This chapter examines the relationship between intra-EU labour mobility and the export of pensions between EU and EFTA countries. The export of pensions, facilitated by the coordination of social security systems, are key to ensuring that intra-EU labour mobility is fair in the sense that it respects the principle of equal treatment and non-discrimination. This principle means that EU-citizens, in particular EU workers, moving between EU countries should not be treated less favourably in terms of social protection than nationals of the country where they work. It also means that EU-citizens should not lose pension rights because they moved within the EU at some point in their life. As intra-EU labour mobility, including cross-border work, has increased in recent decades, a similar upward trend can be expected in cross-border pensions, with the latter acting as both a driver and a consequence for the former.

The next section examines the role of cross-border pensions in promoting fair intra-EU labour mobility, in particular by looking at the relationship between free movement of labour and cross-border pensions from a qualitative and quantitative perspective at the EU/EFTA level. The subsequent sections respectively concentrate on the payment of pensions across borders and on intra-EU labour mobility in selected EU/EFTA countries. The last section concludes by comparing between trends in labour mobility and cross-border pensions.

Key findings

Retired vs. active movers

- The principle of free movement of workers has been fundamental to the EU since its inception. This involves rules and regulations that ensure that individuals moving within the EU and EFTA do not lose their pension rights and that they are not discriminated against on the basis of nationality, according to the principle of equal treatment or non-discrimination.
- There are fewer retired movers than mobile working age persons in the EU and EFTA. In 2022, there were 1 437 000 retired movers aged 60+ compared to 8 013 000 economically active movers. Meaning less than 2% of retirement age are mobile compared to around 4% of active persons. However, intra-EU mobility and cross-border pensions are interlinked.

The co-evolution of intra-EU mobility and cross-border pensions in the EU and EFTA

- The export of pensions in the context of the coordination of social security systems in the EU and EFTA plays an instrumental role in promoting fair labour mobility. The export of pensions is also a consequence of labour mobility. For these reasons, a co-evolution of labour mobility and cross-border pensions is to be expected, albeit with a time lag. Such a co-evolution is noticeable at EU and EFTA level.
- There has been a sustained increase in labour mobility since 2010. The share of EU/EFTA movers aged 20-64 rose from 2.8% in 2010 to 3.8% in 2022. The

importance of EU/EFTA cross-border workers in the EU and EFTA countries also increased steadily over the 2010-2022 period, accounting for 0.9% of the employed population aged 20-64 in 2022 (1.8 million), up from 0.6% in 2010.

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

Exports of pensions

- The top exporters of pensions in 2021 were Germany (1 292 000 pensions), France (1 032 000), Switzerland (876 000), Poland (627 000), the Netherlands (220 000), and Austria (195 000). Together, they accounted for approximately three-quarters (75%) of all pensions exported across the EU and EFTA.
- The top exporting countries in terms of the value of cross-border pensions in 2021 were Switzerland (5.79 billion), Germany (5.27 billion), France (3.18 billion), Belgium (1.25 billion), Luxembourg (1.17 billion), and the Netherlands (943 million).

Main sending countries of intra-EU labour mobility and 'importers' of pensions

- It could be expected that the main countries of origin of EU/EFTA movers/ cross-border workers and the main countries of residence to pensioners receiving pensions from other countries would be the same due to the prevalence of return mobility.
- The top importing countries of pensions in 2021 were Germany (898 000), Italy (864 000), Spain (796 000), France (520 000), and Portugal (465 000). Together these five Member States accounted for a full two-thirds (66%) of all pensions imported across the EU and EFTA in 2021.
- A key channel of cross-border pensions is from western European countries (i.e. France and Germany) to southern European destinations (i.e. Spain, Italy and Portugal). For example, in 2021, over half of all pensions exported from France went to Portugal (353 000) and Spain (312 000) and 210 000 pensions were exported from Germany to Spain.

Comparing trends in labour mobility and cross-border pensions

- Several countries are both main destination countries for labour mobility and primary exporters of cross-border pensions, such as Germany and France. However, other important destination countries for labour mobility, such as Spain, do not appear as key exporters of cross-border pensions.
- Conversely, some countries (e.g. Italy and Portugal) are both main sending countries for mobile workers and main receiving countries of cross-border pensions. Nevertheless, other significant sending countries of active movers, such as Poland, are not main destinations of cross-border pensions.
- These trends appear to suggest an inverse relationship between the directions of flows of intra-EU mobility and cross-border pensions (e.g. incoming movers

results in pension exports). Nonetheless, this relationship is imperfect, as certain countries demonstrate.

- Part of this may be due to the fact that data on cross-border pensions can include a range of scenarios involving movement between countries, such as pensioners moving to a country for retirement where they have no previous work history or active movers staying in their host country after retirement.

Organisational set-up and data

- The measurement of cross-border pensions is based on administrative data collected by national pension authorities from the respective EU and EFTA countries. Different pension authorities may have used different methodologies which limit the cross-country comparability of this data. Moreover, the data does not capture the nationality of the cross-border pension beneficiary, limiting the overall accuracy of the resulting estimates and thus requiring some assumptions about their country of origin.

Demographic change and future trends

- Pension exports between EU countries are expected to rise in coming years, probably outpacing the growth in working-age movers, not least because many moves are only for a few years.

4.2 The role of cross-border pensions in promoting intra-EU mobility

This section examines the relationship between cross-border pensions and labour mobility at the EU/EFTA level. It first shows how the coordination of EU social security systems across EU and EFTA countries plays a key role in ensuring the free movement of persons in the European Economic Area (EEA). It then focuses on the relationship between the free movement of labour, which this chapter refers to henceforth as ‘active movers’ (comprising both employed and unemployed EU/EFTA movers), and cross-border pensions in this extended single market. Finally, it provides quantitative insights into the co-evolution of intra-EU mobility and cross-border pensions over a recent period.

4.2.1 Free movement of persons and coordination of EU social security systems

The freedom of movement of workers and persons in the EEA

The principle of free movement of workers has been fundamental to the EU since its inception. It is enshrined in law in Article 45 of the TFEU and has been further refined by additional EU legislation and rulings by the Court of Justice¹¹⁸. The free movement of

¹¹⁸ Other measures include the reform of the system of recognition of professional qualifications obtained in other EU Member States to harmonise and facilitate the procedure, the introduction in 2016 of a European professional card to test an electronic recognition procedure for selected regulated professions, a European health insurance card as proof of insurance in accordance with Regulation (EC) No 883/2004, and a directive on cross-border healthcare (Directive

persons in the EU is a cornerstone of EU citizenship, established by the Treaty of Maastricht in 1992, and is one of the four fundamental freedoms guaranteed by the EU's Internal Market. The right to freedom of movement, further extended to EFTA countries, is guaranteed by Article 21 of the TFEU¹¹⁹.

Article 48 of the TFEU establishes the legal basis for EU legislation on the coordination of social security systems with the aim of ensuring free movement within the EU. This involves rules and regulations that ensure that individuals moving within the EU and EFTA do not lose their social security rights (such as old age pensions, unemployment benefits, pre-retirement and invalidity pensions, survivors' benefits and death grants, and family benefits) and that they are not discriminated against on the basis of nationality, according to the principle of equal treatment or non-discrimination.

The role of the coordination of social security systems in supporting the free movement of persons

EU provisions on the coordination of social security schemes have existed since Regulations No. 3 and 4 of 1958. They have been the subject of many updates and enhancements. A first major reform of the coordination of social security systems dates back to the early 1970s, with Regulation (EEC) 1408/71 of 1971 on the application of social security schemes to employed and self-employed persons and members of their families moving within the Community. The rules on the coordination of social security systems have since been modernised by Regulation (EC) No 883/2004 and Regulation (EC) No 987/2009 on its implementation. The personal scope was extended to nationals of third countries by Regulation (EU) No 1231/2010¹²⁰.

The modernised coordination system for social security in the European Union (EU) came into force on 1 May 2010. It is made up of Regulation (EC) No 883/2004 (the Basic Regulation) and the accompanying implementing Regulation (EC) No 987/2009. The application of the social security coordination rules has been extended to the EFTA States. In relation to EEA States (Iceland, Liechtenstein and Norway), the EEA Agreement applies. In relation to Switzerland, social security coordination is provided by the EU-Swiss Agreement on Free Movement of Persons¹²¹. The modernised coordination system applies to Switzerland from 1 April 2012 and to Norway, Iceland, and Liechtenstein from 1 June 2012¹²².

These regulations and agreements specify which country is responsible for providing social security benefits and under what conditions. They allow individuals to aggregate (according

2011/24/EU), the obligation to ensure access to judicial procedures for workers who have suffered discrimination and to designate bodies to promote and monitor equal treatment (Directive 2014/54/EU) and improvements in the acquisition and preservation of supplementary pension rights (Directive 2014/50/EU)

¹¹⁹ The gradual phasing-out of internal borders under the Schengen agreements was followed by Directive 2004/38/EC (of the European Parliament and of the Council of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States amending Regulation (EEC) No 1612/68 and repealing Directives 64/221/EEC, 68/360/EEC, 72/194/EEC, 73/148/EEC, 75/34/EEC, 75/35/EEC, 90/364/EEC, 90/365/EEC and 93/96/EEC) on the right of EU citizens and their family members to move and reside freely within the EU.

¹²⁰ Regulation (EC) No 883/2004 of the European Parliament and of the Council of 29 April 2004 on the coordination of social security systems (consolidated text); Regulation (EC) No 987/2009 of the European Parliament and of the Council of 16 September 2009 laying down the procedure for implementing Regulation (EC) No 883/2004 on the coordination of social security systems; Regulation (EC) No 988/2009 of the European Parliament and of the Council of 16 September 2009 amending Regulation (EC) No 883/2004 on the coordination of social security systems, and determining the content of its Annexes; Regulation (EC) No 1231/2010 of the European Parliament and of the Council extending Regulation (EC) No 883/2004 and Regulation No 987/2009 to nationals of third countries who are not already covered by these Regulations solely on the ground of their nationality.

¹²¹ Regulation (EU) No 1231/2010 extended Regulation (EC) No 883/2004 (the Basic Regulation) to nationals of third countries, but this does not apply to Denmark or EFTA countries.

¹²² Since 1 January 2016, Regulations (EC) No 883/2004 and 987/2009 have also applied between the four European Free Trade Association (EFTA) countries of Switzerland, Iceland, Norway, and Liechtenstein.

to the principle of aggregation of periods) and to transfer (according to the principle of exportability of benefits) social security rights when moving within the EU and EFTA. For example, a person who has worked in several EU countries can combine periods of insurance, employment, or residence to qualify for benefits. Beneficiaries of the coordination of social security systems are not only all EU nationals (and their family members) who are covered by the social security legislation of a Member State, but also non-EU nationals and their family members who are legally resident in the EU and EFTA.

4.2.2 Free movement of workers and cross-border pensions

The role of cross-border pensions in supporting the free movement

The possibility to export pensions (e.g. old-age pensions) plays an important role in supporting fair intra-mobility of workers (Box 3). Ineffectiveness and inefficiencies in the coordination of pension systems across EU and EFTA countries can present a disincentive for workers considering cross-border employment in the European Economic Area while intra-EU labour mobility is widely acknowledged as a substantial contributor to the efficiency of labour markets within the European Union (EU), as it enhances skill matching, addresses labour shortages, and fosters adaptable labour markets¹²³. Furthermore, problems of coordination between pension systems can lead to administrative costs.

Moreover, guaranteeing equal access to pensions for all workers, regardless of their nationality or employment history, upholds the fundamental principles of social inclusion and cohesion within the EU.

Box 3: Main coordination principles applying to statutory old-age pensions and methods of calculation

The following coordination principles apply to statutory pensions¹²⁴:

- Pension rights acquired in a Member State are guaranteed. The repurchase of statutory retirement pensions, reimbursement of contributions or export to another Member State are generally not possible.
- Statutory pensions acquired in a Member State are paid when the retirement age set by that Member State is reached¹²⁵. Retirement pensions are paid directly in other Member States where pensioners live (Regulation (EC) No 883/2004, Article 7: “Waiving of residence rules”).
- Each partial pension is subject to the *eligibility criteria* (retirement age, minimum insurance periods, etc.) of the country whose institution is granting the pension. It is therefore possible to be entitled to an old-age pension in one country even if the statutory retirement age has not yet been reached in another country.
- If a mobile worker has not been affiliated to a Member State’s social security scheme for a sufficient period to qualify for an (early) old-age pension because of waiting periods, periods of insurance completed in other Member States must be

¹²³ See, for instance, Hassan E., Siöland L., Akbaba B., Cinova D., Gasperini M., and Geraci M. (2023), Annual Report on Intra-EU Labour Mobility 2022, European Commission, Directorate-General Employment, Social Affairs, and Inclusion.

¹²⁴ Regulation (EC) No 883/2004 only covers statutory social security systems. For this reason, the EU has adopted specific rules to protect the supplementary pension rights of mobile EU workers. These rules apply to supplementary pension schemes linked to an employment relationship (“occupational pensions”).

¹²⁵ The legal retirement age in EU and EFTA countries varies, so it is possible for an individual to be eligible for an old-age pension in one country before they reach the legal retirement age in another country.

taken into account in order to qualify for such a pension (Regulation (EC) No 883/2004, Article 52).

- If a mobile worker has been insured in a Member State for less than one year, the old-age pension will generally not be paid by that Member State. These periods are adopted by the competent institutions of other Member States under their laws and treated as their own periods when the pensions are calculated. (Regulation (EC) 883/2004, Article 57).¹²⁶

Regulation (EC) 883/2004, Article 52 (Award of benefits) sets out the calculation of pensions. Each Member State must carry out three calculations:

- Calculation of the national pension: independent benefit/pension. The national pension is the old-age pension to which a mobile European worker is entitled for the years of insurance in the relevant Member State. It is calculated in accordance with the national legislation of that Member State. Insurance periods completed in other Member States are not taken into account. The national pension is known as an “independent benefit”.
- Calculation of the theoretical pension: theoretical benefit/pension. The theoretical pension is the amount of old-age pension that a mobile European worker would be entitled to if they had completed all of their insurance periods in a single Member State. The worker is not entitled to this amount directly, but it is used as an intermediate step in calculating the pro rata pension. If the amount of the benefit depends on the length of the periods completed under the legislation in question, this amount is the theoretical amount.
- Calculation of the proportional pension: pro-rata benefit/pension. The proportional pension (also known as the pro rata pension or international pension) is calculated by multiplying the amount of the theoretical pension by a fraction. The numerator of the fraction is the length of the period completed in the Member State, and the denominator is the total length of all the periods completed in all the Member States taken into account for the calculation of the theoretical amount. The proportional retirement pension amounts to:

$$\left(\frac{\text{Period of insurance in the Member State}}{\text{Total period of insurance in all the Member States}} \right) \times \text{Theoretical Pension in a Member State}$$

Finally, the amount of the national pension is compared with the proportional pension. Each Member State then pays the highest pension amount.

For instance, an Austrian lab assistant worked for 23 years in Austria, followed by 2 years in Germany, before completing another 15 years in Italy. They were registered for social security throughout their 40-year career. The Italian pension service computes pension estimates by first calculating the Italian retirement pension based on local regulations, then calculating the theoretical pension which would have accrued over 40 years of social security contributions in Italy. Finally, the pro-rata pension is calculated as 15/40 of the theoretical retirement pension. A comparison is made between the Italian national pension and the pro-rata retirement pension, and the higher amount is paid to the beneficiary. Similar calculations also take place in Austria and Germany, but Germany has a waiting period of five years before the calculation can be carried out. Therefore,

¹²⁶ For example, a French resident has been working (as a frontier worker) in Germany for ten months. As registered for less than one year with the German social security, the person is not entitled to a German retirement pension, as per Article 57 of Regulation (EC) 883/2004. Instead, the 10 months of contributions made in Germany are treated by France, where they last worked, as if they were earned there and are taken into account when calculating retirement benefits under French law.

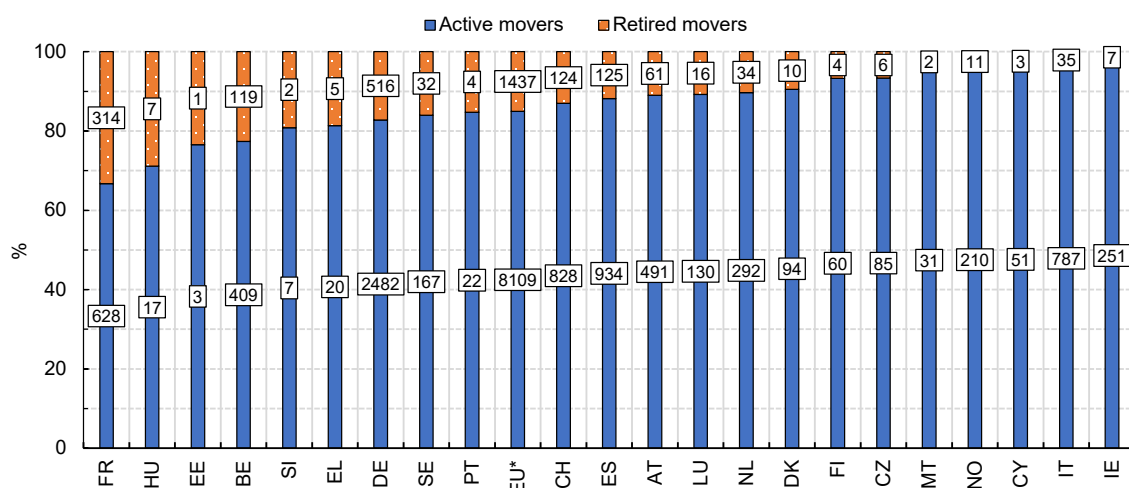
the German national independent pension is not calculated. The laboratory assistant is only entitled to a pro-rata pension from Germany.

Source: Milieu based on ETUC (2022)

Retired movers in Europe

Looking at the trends for retired and active movers¹²⁷, the number of retired movers has grown slightly faster than the number of active movers over the 2017-2022 period (Figure 42)¹²⁸. At the EU level, the number of retired movers grew at an annual rate of 2.2% compared to 2.0% for the population of active movers, with considerable variation between countries. In absolute terms, the number of retired movers has risen from 1 258 000 in 2017 to 1 437 000 in 2022 (Figure 41)¹²⁹. If we look back further, we see that the number of retired movers has been increasing for at least the last decade.

Figure 41: Active movers and retired movers, as a proportion (in %) and in absolute terms (in 1 000s), 2022



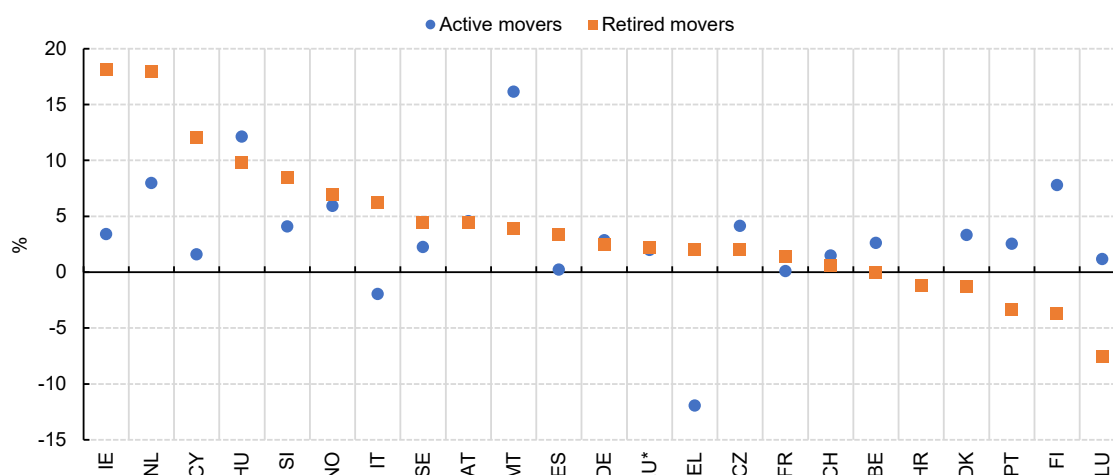
Note: *EU includes EU27 and EFTA movers. Only countries for which data is available across both age groups are presented in this figure. Bulgaria, Iceland, Latvia, Lithuania, Poland, Romania, and Slovakia are omitted from this figure. Active movers = EU and EFTA citizens aged 20-64 who are employed or unemployed in an EU and EFTA country other than their country of citizenship. Retired movers = EU and EFTA citizens who self-identify as retired, and live in an EU and EFTA country other than their country of citizenship, aged 60 and above.

Source: EU-LFS 2022, custom extraction by Milieu.

¹²⁷ 'Active movers' refers to EU/EFTA movers aged 20-64 that are employed or unemployed.

¹²⁸ Figures about retired movers show a break of time series in 2017 are not available for earlier years

¹²⁹ Eurostat [migr_pop1ctz], Milieu calculations.

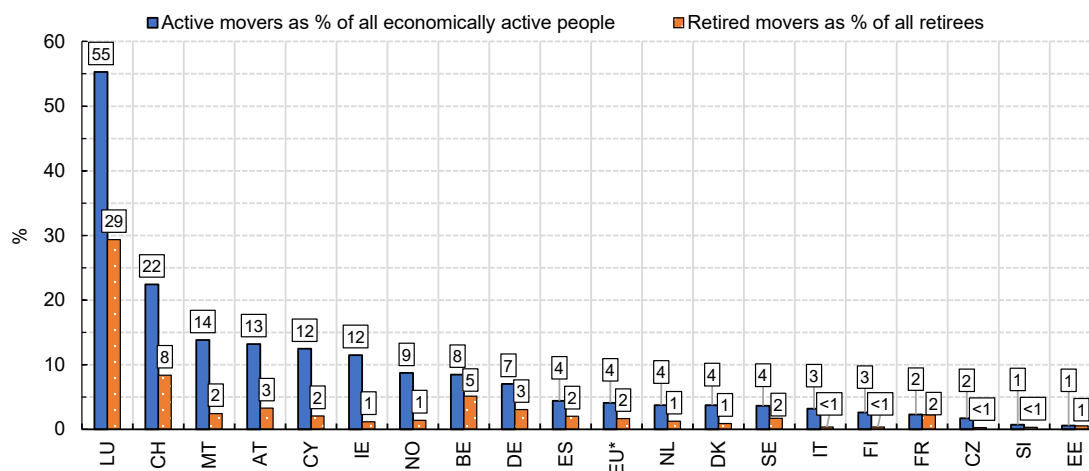
Figure 42: Annual growth rate of retired movers and active movers, 2017-2022

Note: *EU includes EU27 and EFTA movers. Only countries for which data is available across both age groups are presented in this figure. Bulgaria, Iceland, Latvia, Lithuania, Poland, Romania, and Slovakia are omitted from this figure. Growth rates used in this figure represent the compound annual growth rate (expressed as a percentage). Active movers = EU and EFTA citizens aged 20-64 who are employed or unemployed in an EU and EFTA country other than their country of citizenship. Retired movers = EU and EFTA citizens who self-identify as retired, and live in an EU and EFTA country other than their country of citizenship, aged 60 and above.

Source: EU-LFS 2022, custom extraction by Milieu.

In some countries, e.g. Ireland, the Netherlands, and Cyprus, the number of retired movers has grown much faster than the number of active movers. In others, like Finland, Portugal or Malta, the number of active movers grew much faster, while in a third set of countries both groups of movers developed in parallel.

Although the number of retired movers has been on the rise over recent years, their share amongst all pensioners is much smaller than the share of active movers in the active population. Active movers aged 20-64 account for approximately 4.2% (8 109 000) of the total working population in EU and EFTA countries (198 700 000), yet retired movers (60+) account only for 1.7% (1 437 000) of the retired population (85 688 000) (Figure 43)¹³⁰. Germany (516 000), France (314 000), and Spain (125 000) together account for about two-thirds of all retired movers in 2022.

Figure 43: EU & EFTA active movers and retired movers as a % of all nationals & movers in the labour force and all retired people, 2022

¹³⁰ This chapter's measure of working movers includes EU and EFTA citizens living in EU and EFTA countries. This, in turn, results in a higher figure than those presented earlier in this report in Table 1, which is limited to EU and EFTA citizens living in EU Member States, i.e. excluding those movers who went to CH, NO or IS. Source: EU-LFS 2022, custom extraction by Milieu.

Note: *EU includes EU27 and EFTA movers. Bulgaria, Iceland, Latvia, Lithuania, Poland, Romania, and Slovakia are omitted from this figure due to missing data. Portugal, Greece, and Hungary are also omitted from this figure as the number of mobile workers is less than 1% of the total number of national and mobile workers. Growth rates used in this figure represent the compound annual growth rate (expressed as a percentage).

Source: EU-LFS 2022, custom extraction by Milieu.

While the proportion of movers in the retired population is overall smaller than the proportion of movers in the economically active population, the size of this difference varies considerably between countries. Luxembourg stands out as having the highest proportions of movers among the economically active population (55%) and among the retired (29%) population. Movers are also highly represented among the economically active population in Switzerland (22%), Malta (14%), Austria (13%), Cyprus (12%), and Ireland (12%). However, these countries, except for Switzerland, have small proportions of retired movers, ranging from 1% to 2%. The proportion of movers among the retired population is higher in Belgium (5%) than in most other countries, except Luxembourg and Switzerland, and similar to the proportion of movers in the economically active population (8%).

This discrepancy suggests that upon retirement, many previous movers live in a country where they have the same citizenship, i.e. either they return to their country of citizenship before or at the time of retirement, or they take on the citizenship of the country where they have worked as an active mover.

Box 4: Returning home for retirement and other movement cases comprised by cross-border pensions

Several scenarios can explain the export of a pension from one country to a pensioner residing in another.

- There are movers who retire and stay in a country other than their citizenship.¹³¹ Assuming that earlier in their career they worked in the country of citizenship, the (part of the) pension that has been accrued in their country of citizenship is then exported to their current country of residence and retirement. These persons would be registered as retired movers and be a recipient of an exported pension.
- Movers who retire in a country other than their citizenship might, at or after retirement, decide to move to their country of citizenship. In which case a pension would be exported from this country to their new country of residence, however, they would not be retired movers (they are no longer a mover).
- There are persons, who throughout their working live spend prolonged periods in one or several other EU countries, while retiring in their country of nationality. They might – depending on the duration of their employment spells outside their native country and on the volume of acquired pension rights – qualify for exported pensions from these countries. As such, they might benefit from exported pensions.

¹³¹ King, R., Cela, E., and Fokkema, T. (2021). '[New frontiers in international retirement migration](#)', *Aging & Society*, vol. 41, no. 6, pp. 1205-1220; Bolzman, C. A., Bridji, S. (2019). '[Older immigrants living in Switzerland and ambivalence related to return around the retirement period](#)', *International Journal of Comparative Sociology*, vol. 60, no. 1-2, pp. 14-36; Savaş, E. B., Spaan, J., Henkens, K., Kalmijn, M., and van Dalen, H. P. (2023). '[Migrating to a new country in late life: A review of the literature on international retirement migration](#)', *Demographic Research*, vol. 48, no. 9, pp. 233-270.

- There might be persons who decide after retirement for the first time to move a residence in another country (e.g. accompanying a partner for whom the new place of residence is in the country of citizenship or to benefit from the opportunity to more freely choose the place of residence). These persons would in general qualify as beneficiaries of exported pensions and as retired movers.

Table 14: Mobile EU/EFTA citizens by age, 2016-2021 (in 1000)

Category	Age	2016	2017	2018	2019	2020	2021
Outside their country of citizenship	65+	982	1056	1103	1148	1201	1229
	50-64		1431	1517	1595	2477	2978
	35-49		2728	2789	2829	4177	4640
	20-34		2368	2365	2357	3589	3854
Returning to their country of citizenship	65+	37	45	47	51	36	49
	50-64	81	93	96	107	88	102
	35-49	154	162	172	181	156	172
	20-34	238	247	256	267	222	227
Share of returnees living outside their country of citizenship	65+	4%	4%	4%	4%	3%	4%
	50-64		11%	11%	11%	6%	6%
	35-49		6%	6%	6%	4%	4%
	20-34		10%	11%	11%	6%	6%

Source: Eurostat [migr_imm1ctz][migr_pop1ctz], Milieu calculations.

Note: Data for the age groups 20-34, 35-49 and 50-64 is missing for the year 2016. The significant drop off in the number of EU/EFTA citizens living outside their country of citizenship from 2019 to 2020 is due to Germany only reporting data from 2020 onwards, while France, Croatia, Greece, Cyprus, and Poland only report data on the number of EU/EFTA citizens living outside their country of citizenship for 2021.

Table 15 shows that return mobility for older movers is low. Annually, only 3-4% of the 65+ age group return to their country of citizenship, while – especially before the COVID-19 pandemic – up to 11% of movers in the 50-64 age group returned to their country of citizenship.

The ratio of return mobility over outward mobility (Table 16) highlights the importance of return mobility and its variance across countries. It is calculated by dividing the number of EU-27 citizens returning to their country of citizenship by the number of citizens emigrating from their country of citizenship to another EU-27 Member State, and multiplying that figure by 100.

Table 15: Ratio of returnees over outward mobility for selected countries, by country of citizenship, aged 20+, 2015-2020

Country	2015	2016	2017	2018	2019	2020	Trend
Belgium	58	49	46	44	44	52	
Bulgaria	28	27	34	31	31	451	
Czechia*	51	55	62	69	46	105	
Germany	72	66	65	61	59	66	
Estonia	108	76	109	116	107	79	
Spain	36	40	51	53	51	45	
Croatia	13	14	11	16	22	31	
Italy	22	24	23	25	31	38	
Lithuania	54	28	21	53	77	125	
Hungary	66	75	95	117	126	134	
Austria	54	53	50	52	51	64	
Slovenia	31	31	32	65	55	225	
Sweden	69	65	59	56	56	58	

Source: Eurostat [migr_emictznxt; migr_immctzprv], Milieu calculations.

Note: This is an ad hoc dataset for the 2015-2020 period in which several Member States are not included. Additionally, all EFTA countries have been excluded from this dataset.

*Czechia: Due to limited data availability, the ratio of returnees over emigration includes all ages (0-100+) rather than ages 20+ only.

For example, in 2020, Germany and Belgium had return ratios of 66 and 52 respectively, meaning that for every 100 of their citizens who move to another Member States, 66 and 52 citizens returned that same year. In some central and eastern European Member States (e.g. Hungary and Estonia), return ratios exceeded 100 in some years, indicating that more citizens of the respective country returned than left.

Overall, given that the number of returnees aged 65+ is lower than for all age groups compared (Table 15), combined with the strong prevalence of circular mobility within the EU as can be seen by the return ratios provided (Table 16), this suggests that in many cases EU citizens move abroad for a number of years and return to their country of citizenship before reaching regular pension age.

Based on the above trends, we expect the number of cross-border pensions to increase over the years, albeit with some time lag¹³².

4.2.3 Co-evolution of labour mobility and cross-border pensions at EU/EFTA level

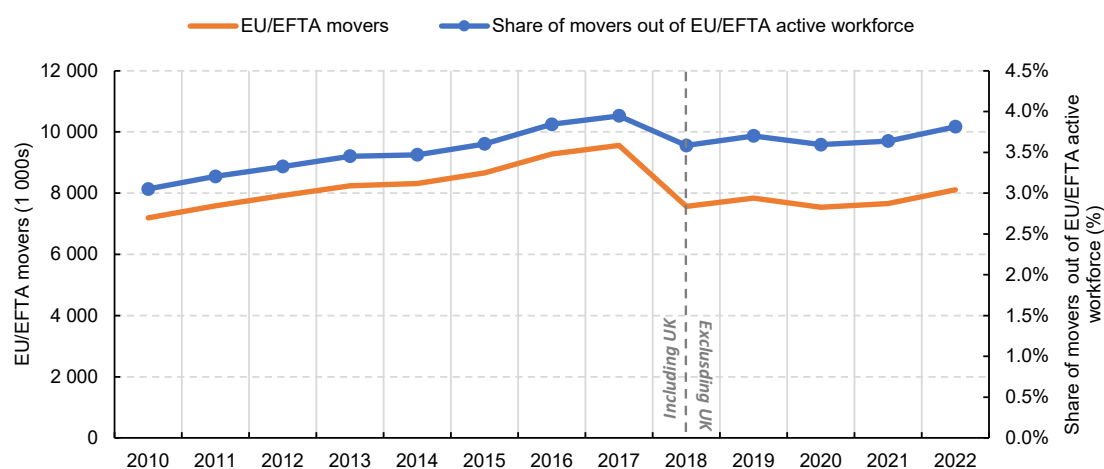
Trends in labour mobility in the EU and EFTA

The percentage of EU/EFTA individuals, both employed and unemployed, aged between 20 and 64 years, who have moved within EU and EFTA countries, has shown a consistent increase since 2010. Starting at 3% in 2010, this figure rose to 3.8% in 2022, indicating a total of approximately 8.1 million EU/EFTA active movers in these countries that year¹³³.

¹³² See also De Wispelaere F., De Smedt, L., and Pacolet, J. (2023), Cross-border old-age, survivors' and invalidity pensions: Report on the portable documents P1 – Reference year 2022, European Commission, Brussels.

¹³³ This figure differs from the figure of active working-age movers in 2022 in Table 1 (i.e., 7 million EU movers) as here EFTA as destination countries and movers with EFTA nationality are included.

Figure 44: EU/EFTA active movers aged between 20 and 64 years in EU/EFTA countries, 2010-2022

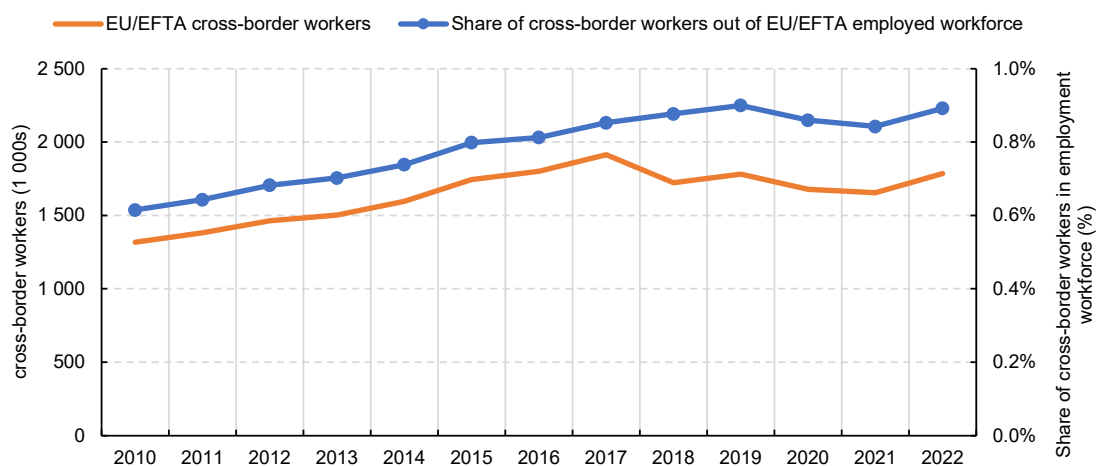


Note: Movers = employed and unemployed only.

Source: EU-LFS different years, custom extraction by Milieu.

The number and share of EU/EFTA cross-border workers in EU and EFTA countries developed in parallel to the number and share of movers. In 2022, they account for 0.9% of the employed population aged 20-64, up from 0.6% in 2010. In 2022, the number of EU/EFTA cross-border workers in these regions was around 1.8 million.

Figure 45: EU/EFTA cross-border workers aged between 20 and 64 years in EU/EFTA countries, 2010-2022



Note: Cross-border workers = employed only.

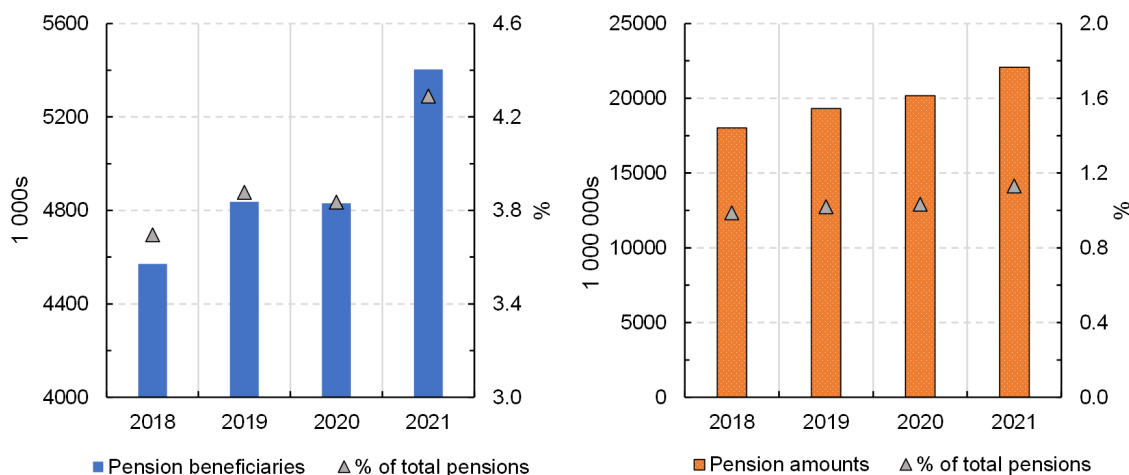
Source: EU-LFS different years, custom extraction by Milieu.

Trends in cross-border pensions in the EU and EFTA

Between 2018 and 2021, there was a discernible increase in the number of cross-border pensions. In 2018, approximately 4.57 million pensions were imported or exported between EU and EFTA countries, representing around 3.7% of national pensions in these countries (Figure 46). By 2021, this number has grown to about 5.4 million, representing a substantial increase of 18% over a relatively short period, rising to 4.3% of national pensions in these countries. Comparing this with an estimated 1.4 million retired movers according to the Labour Force Survey, indicates that there are almost four times as many exported pensions

than retired movers. This underlines that the large majority of exported pensions is paid to returnees.

Figure 46: Number of cross-border pension beneficiaries (left, in 1 000s) and amount paid in cross-border pensions (right, in EUR 1 000 000s) at EU/EFTA level



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations; ESSPROS [spr_pns_ben] [spr_exp_pens], Milieu calculations.

Note: 2020 is the latest national pension data (ESSPROS) used for 'Total' (EU/EFTA) due to the significant number of countries missing data in 2021. 2018 is the latest national pension data available for Switzerland.

The amount paid in cross-border pensions shows a comparable trend. In 2018, the total value of pensions imported to EU and EFTA Member States amounted to EUR 18.02 billion (Figure 46), amounting to 1.0% of total pensions paid in these countries. By 2021, this figure rose to EUR 22.08 billion and 1.1% of total pensions paid.

Overall, this suggests a further increase in both the number of beneficiaries and the number of pensions exported within the EU and EFTA, in line with growing labour mobility. The following sections focus on examining this co-evolution on a country-by-country basis. The aim is to provide a more detailed understanding into the relationship between cross-border pensions and labour mobility at the level of individual countries.

In a simple scenario, the flows of EU/EFTA active movers and cross-border pensions could be expected to go in opposite directions: e.g. Portuguese workers moving to France for work, returning to Portugal and then receiving an exported pension from France upon retirement, or French workers who commuted over a longer period to Switzerland and then receive an exported pension from Switzerland. This would be in line with the observation that, in most EU and EFTA countries, older foreign EU/EFTA residents are under-represented in relation to their working age counterparts.

However, the reality is more complicated. For example, movers might have worked in their home country before moving and decide to stay in their 'new' country for retirement. In this case, their pension benefits would be paid out in this country, meaning that the flows of pension benefits and labour mobility go in the same direction. Finally, persons might move from one country to another for reasons other than work, including retirement, thus not being linked to labour mobility and its respective patterns.

While the data on cross-border pensions provide a good picture of the pension exports taking place, the underlying legal and organisational structures are less consistent. In some cases, it matters whether a pension is a 'single pension', whereas this seems to be irrelevant for other systems. Also, the question of whether and to which extent a transfer of pension rights from one system to another has taken place before calculating a pension remained

outside the scope of this analysis as it was not possible to obtain consistent and reliable information in this regard. Furthermore, not least as social security coordination evolves over time, this data altogether does not lend itself to a longitudinal analysis, which would link employment biographies with pension profiles.

4.3 Exported pensions and labour mobility

This section looks at the relationship between the main countries receiving EU/EFTA active movers and the main countries exporting pensions.

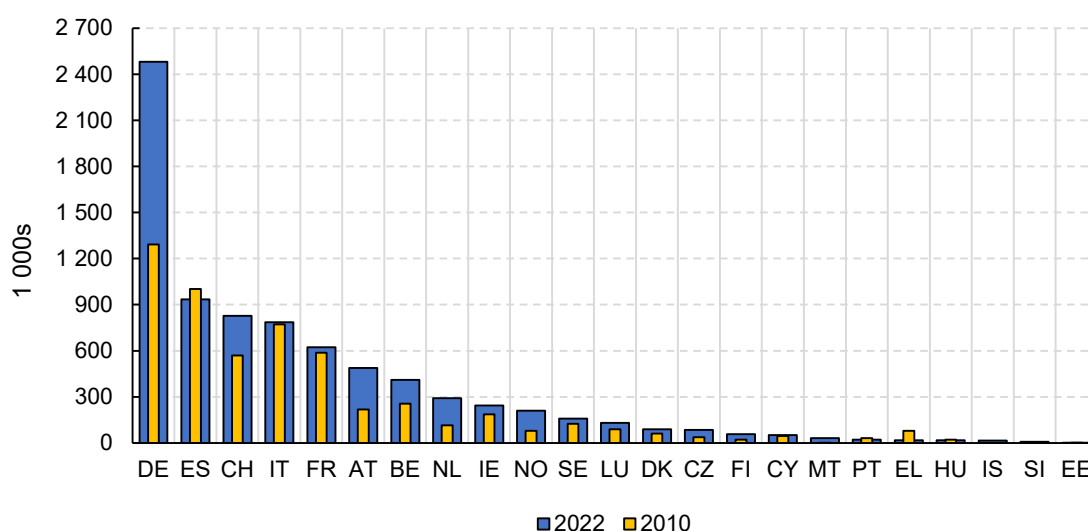
4.3.1 Main destination countries for labour mobility

EU/EFTA active movers by country

The ranking of top countries of destination for EU/EFTA movers has remained relatively consistent over the years, with the same set of countries (except for the UK) occupying the top spots in 2022 and 2010. Those countries are Germany, Spain, Switzerland, Italy, and France, all having above 500 000 movers in 2010 and over 600 000 active movers in 2022 (Figure 47).

Notably, Germany experienced a consistent annual growth rate of 6% over the 12-year period. This led to a doubling of its mobile labour population, emphasising its status as a main destination for active movers. Switzerland also experienced a relatively high growth in the number of active movers. In contrast, Italy, France, and Spain maintained their positions as preferred destinations without undergoing substantial shifts in their labour mobility landscapes.

Figure 47: EU/EFTA active movers by country of destination, 2010 and 2022



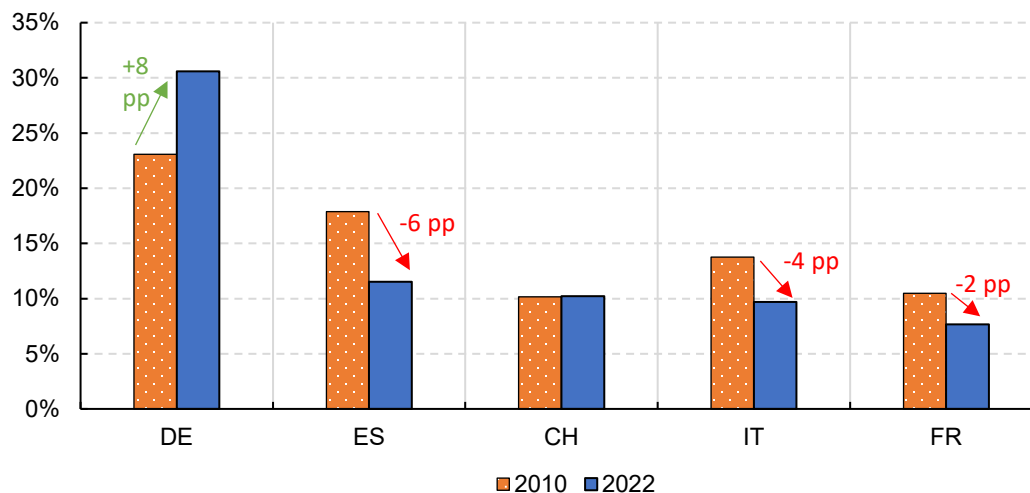
Note: Movers = employed and unemployed only. To ensure better comparability, figures for 2010 exclude UK movers and UK as a destination country. Missing data for Bulgaria, Croatia, Latvia, Poland, Romania, and Slovakia.

Source: EU-LFS 2022 and EU-LFS 2010, custom extraction by Milieu.

In 2022, the combined number of active movers in the top five destination countries accounted for about 70% of total labour mobility within the EU/EFTA. However, when compared to 2010, this share has decreased by 5 percentage points, signalling a gradual shift in labour mobility patterns towards other destinations. Furthermore, most of the top five destination countries saw a decline in their share of active movers within the overall labour

mobility landscape between 2010 and 2022 (Figure 48). The exception being Germany, which attracted in 23% of all active movers within the EU/EFTA in 2010, growing to 31% by 2022.

Figure 48: EU/EFTA active movers in top destination countries as a share of total EU/EFTA active movers, 2010 and 2022

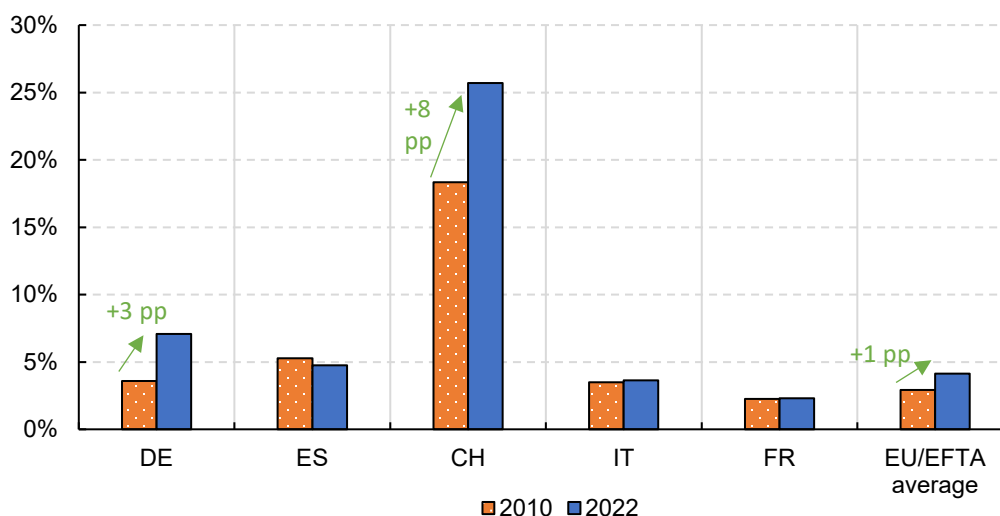


Note: Movers = employed and unemployed only. To ensure better comparability, figures for 2010 exclude UK movers. “pp” = percentage points.

Source: EU-LFS 2022 and EU-LFS 2010, custom extraction by Milieu.

While the top destination countries have experienced a rise in the number of active movers in absolute terms between 2010 and 2022, the shift in their share of the total population were more modest. In Spain, France, and Italy, in particular, the proportion of active movers within their total population remained relatively stable throughout the 12-year period. Germany instead experienced a more substantial rise peaking at 7% by 2022. However, the most remarkable shift occurred in Switzerland. Starting at 18% in 2010, the share of active movers within Switzerland’s population surged to 26% by 2022, underscoring the significant influx of EU/EFTA active movers over the years.

Figure 49: EU/EFTA active movers in top destination countries as a share of total active workforce in those countries, 2010 and 2022



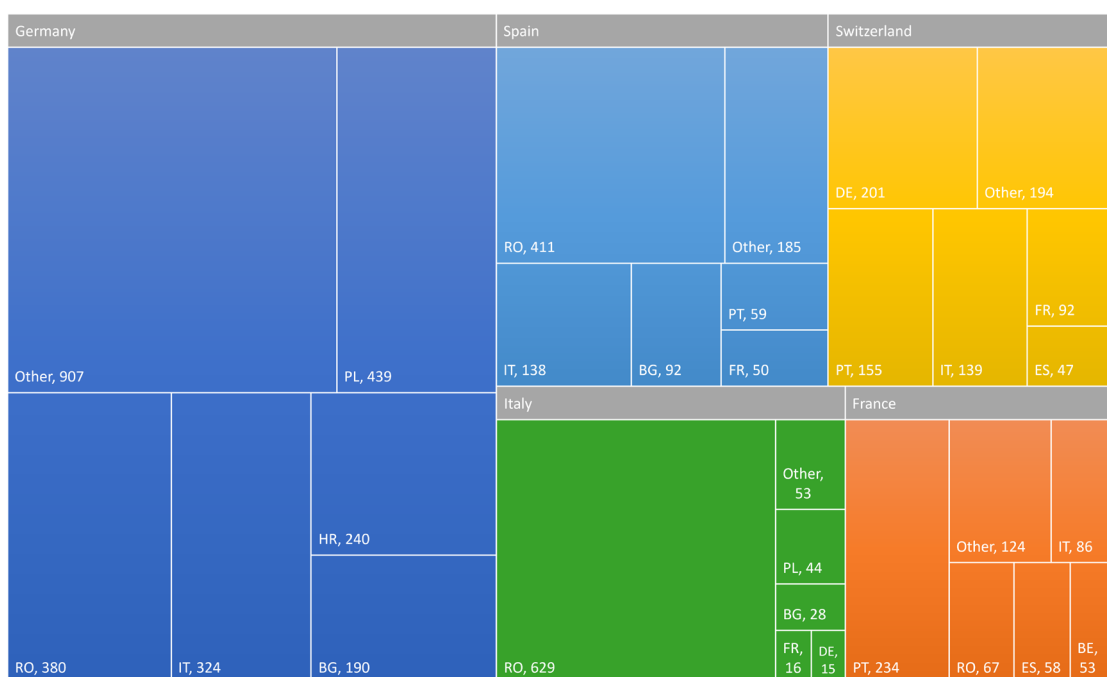
Note: Movers = employed and unemployed only. To ensure better comparability, figures for 2010 exclude UK movers. “pp” = percentage points.

Source: EU-LFS 2022 and EU-LFS 2010, custom extraction by Milieu.

In 2010, the largest groups of EU/EFTA active movers to Germany were from Italy and Poland. By 2022, the composition had shifted, with Poland becoming the dominant nationality, followed by Romania, with Italy only in third place. In France, the composition remained relatively stable with Portugal being the leading nationality among all EU/EFTA movers to France in both 2010 and 2022. However, in 2022, the number of active movers from Romania was remarkably higher than in 2010. The composition of top nationalities among EU/EFTA movers in Italy, Switzerland, and Spain exhibited a remarkable degree of consistency throughout the period under examination. These countries continued to attract active movers from the same nationalities over the years.

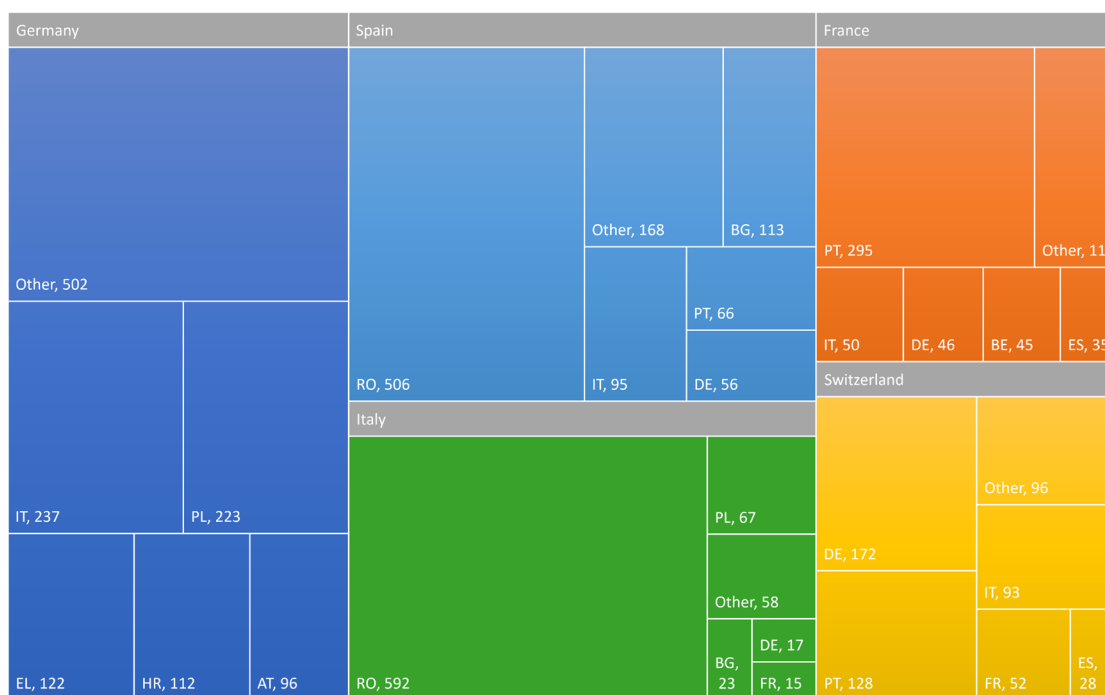
Figure 50: EU/EFTA active movers in the main destination countries (in grey) by main citizenships, 2010 and 2022¹³⁴

a) 2022 (numbers in 1 000s)



b) 2010 (numbers in 1 000s)

¹³⁴ This figure is different from Figure 13 in Chapter 2. Figure 13 looks at movers overall (not necessarily active) and it does not consider EFTA countries.



Note: Movers = employed and unemployed only. The main destination countries are those in grey in the figures. *How to read this graph:* there were 439 000 Polish active movers working in Germany in 2022, which is double the number of Polish active movers in 2010, which was 223 000. For 2022, data disaggregated by citizenship and country of destination, as well as including the employment status (active/inactive) was not available. As we are interested only in the active population, this had to be approximated. To do so, we considered the overall activity rate of EU/EFTA movers going to a specific Member State (e.g., 85% of EU/EFTA movers going to DE are either employed or unemployed) and assumed that movers of different citizenships going to the same Member States have the same activity rate (e.g., 85% of AT movers going to DE are either employed or unemployed). To ensure better comparability, figures for 2010 exclude UK movers.

Source: EU-LFS 2022 and EU-LFS 2015, custom extraction by Milieu.

EU/EFTA cross-border workers by country

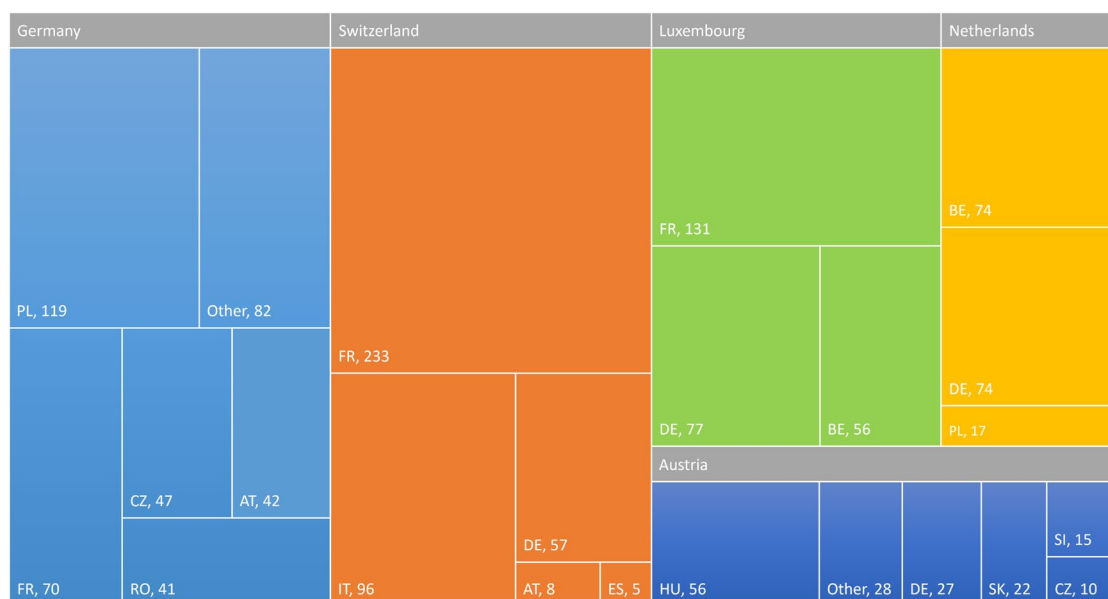
Section 2.4.1 of this report informed about the main destination countries of cross-border workers. These have remained stable since at least 2010. However, the ranking of countries has changed slightly. While in 2010 Switzerland was clearly the most important destination (with 269 000 incoming cross-border workers), followed by Germany in second place (197 000), 12 years later this has reversed (Germany 401 000, Switzerland 388 000). Luxembourg (from 128 000 to 228 000) and the Netherlands (from 104 000 to 140 000) were important destination countries in 2010 and remain so in 2022. Lastly, Austria has also experienced a significant increase over the years, increasing from 92 000 in 2010 to 158 000 in 2022¹³⁵. The rise of cross-border workers to Austria and Germany may be associated with the opening of borders towards Eastern European countries, which is only now manifesting in measurable figures.

The main countries of origin of EU/EFTA cross-border workers among the top destination countries have increased over the period considered. In 2010, the majority of cross-border workers came from Belgium, France and Germany. However, by 2022, the landscape became more heterogeneous, with countries such as Romania, Czechia, Bulgaria, and Hungary emerging as notable sources of cross-border workers alongside the traditional contributors (see Figure 51 below).

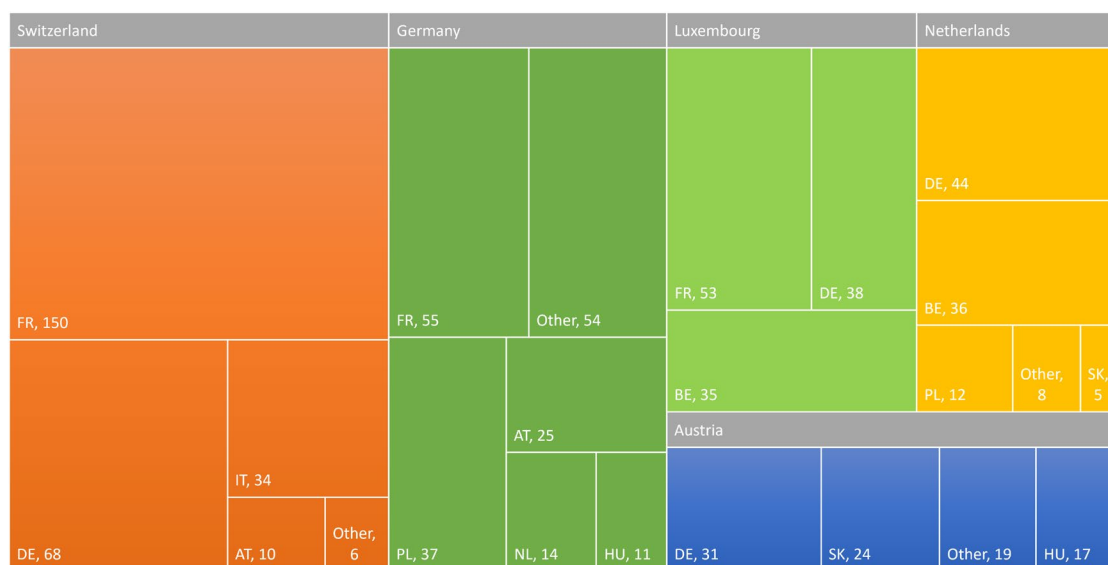
¹³⁵ Figures for 2010 exclude UK cross-border workers and UK as destination country to ensure a better comparability with 2022 figures.

Figure 51: EU/EFTA cross-border workers in the main destination countries (in grey) by main countries of origin, 2010 and 2022

a) 2022 (numbers in 1 000s)



b) 2010 (numbers in 1 000s)



Note: The main destination countries are those in grey in the figures. *How to read this graph:* there were 119 000 Polish cross-border workers in Germany in 2022, which represents a sharp increase since 2010 when Polish cross-border workers were 37 000. To ensure better comparability, figures for 2010 exclude UK cross-border workers and UK as a destination/sending

country. Only main countries of origin are shown for each destination country. When “other” is not displayed it means that no (reliable) flows could be identified from other countries of origin.

Source: EU-LFS 2022 and EU-LFS 2010, custom extraction by Milieu.

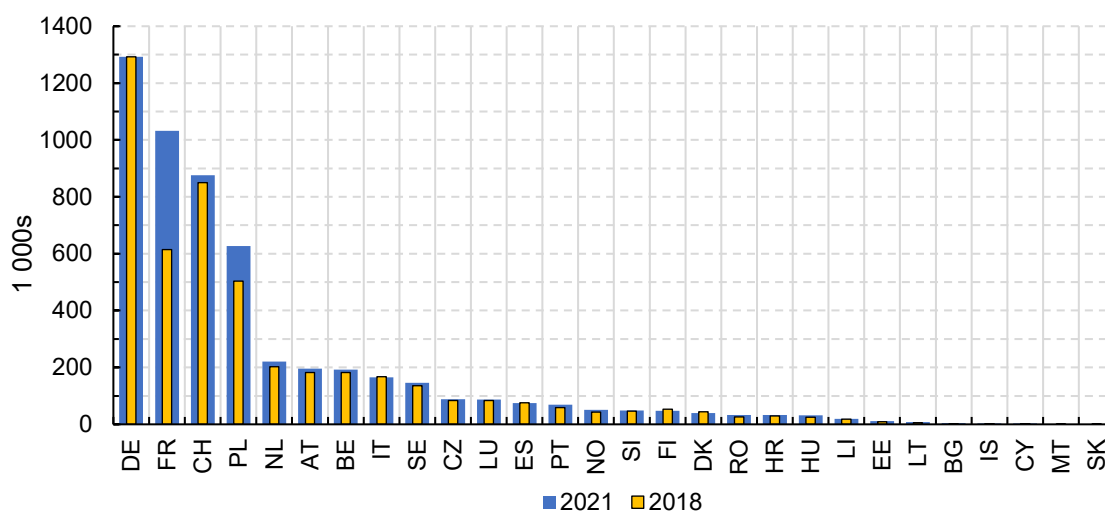
4.3.2 Main exporting countries of cross-border pensions

Exported pensions at country level

In 2021, Germany exported pensions to 1 292 000 beneficiaries. This was virtually no increase compared with 2018, well below the EU/EFTA’s average annual growth rate of 4%.

France and Switzerland followed as the second and third largest exporters in 2021, with 1 032 000 and 876 000 exported pensions respectively. In both cases, the number of pensions exported had increased over 2018 levels. The top five were rounded out by Poland and the Netherlands, with 627 000 and 220 000 exported pensions in 2021 respectively.

Figure 52: Number of pension exports (in 1 000s) at country level, 2018 and 2021

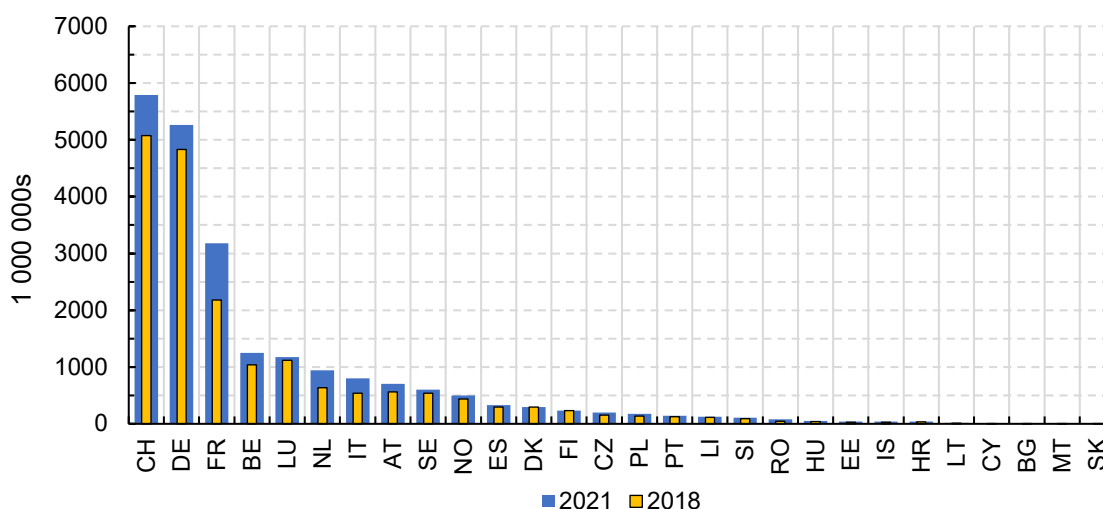


Source : 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

Note: The growth shown for France from 2018 to 2021 is artificially inflated due to a change in the reporting of exported pensions from 2021 onwards. Ireland and Greece are missing data. 2019 export data for Italy is used instead of 2018 due to missing data. Latvia is excluded due to missing data for 2018 and 2019.

Together, these five leading exporters accounted for nearly 4 million or 74% of the over 5.4 million total exported pensions across the EU/EFTA in 2021.

Figure 53: Amount paid in pension exports (in EUR 1 000 000s) at country level, 2018 and 2021



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

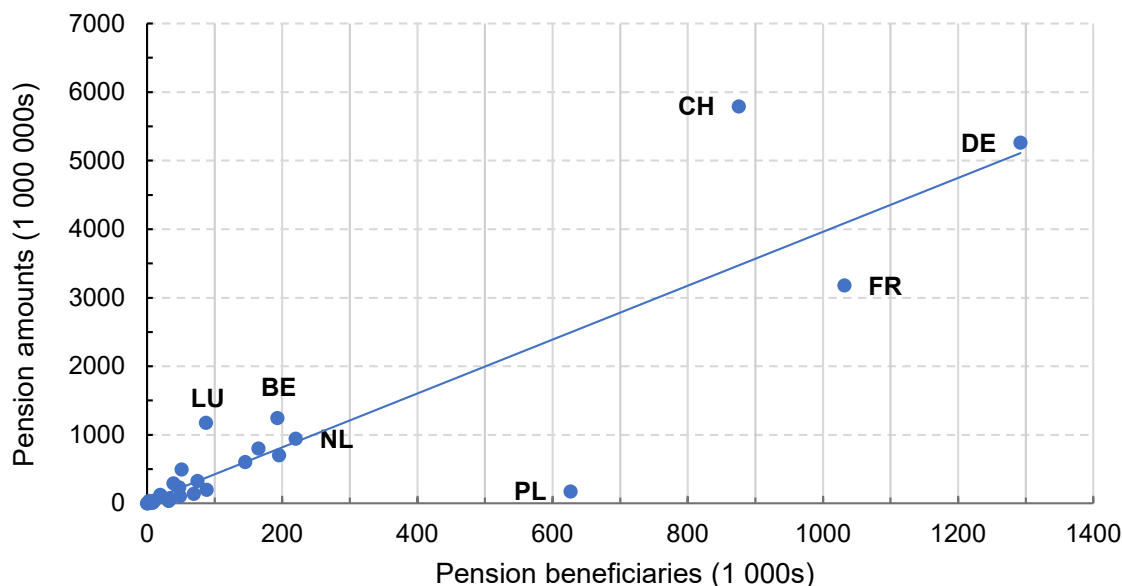
Note: The growth shown for France from 2018 to 2021 is artificially inflated due to a change in the reporting of exported pensions from 2021 onwards. Ireland and Greece are missing data. 2019 export data for Italy is used instead of 2018 due to missing data. Latvia is excluded due to missing data for 2018 and 2019.

In terms of value of exported pensions, Switzerland ranked first, with nearly 5.8 billion EUR paid out in 2021, up from approximately 5.1 billion EUR in 2018. This translated into an average annual growth of 3% over the four-year period. Germany and France follow in second and third, with 5.3 billion EUR and 3.2 billion EUR in pensions exported in 2021 respectively.

Belgium and Luxembourg rounded out the top five pension exporting countries in terms of value, with over 1.2 billion EUR and nearly 1.2 billion EUR paid out in 2021. Belgium grew by an average annual rate of 5% while Luxembourg was quite stable at just 1%. These five major exporters accounted for about three-quarters (75%) or 16.7 billion EUR of the total 22.1 billion EUR paid across the EU/EFTA in 2021.

The total value of pensions exported by Switzerland and Luxembourg is higher than what one would expect considering the number of pensions exported by these countries in 2021. In part, this discrepancy can be explained by the presence of cross-border workers and the more long-term nature of cross-border work assignments in Switzerland and Luxembourg.

Figure 54: Pension exports at country level, 2021, amounts paid (in EUR 1 000 000s) & number of pension beneficiaries (in 1 000s), top five exporting countries highlighted (pension amounts & beneficiaries)



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

Note: Ireland and Greece are missing data. 2019 export data for Italy is used instead of 2018 due to missing data. Latvia is excluded due to missing data for 2018 and 2019.

When comparing both the number (beneficiaries) and the value (amount paid) of pension exports, the trend line shown in Figure 54 indicates that there is a general positive relationship between the number of beneficiaries and the total value of cross-border pensions.

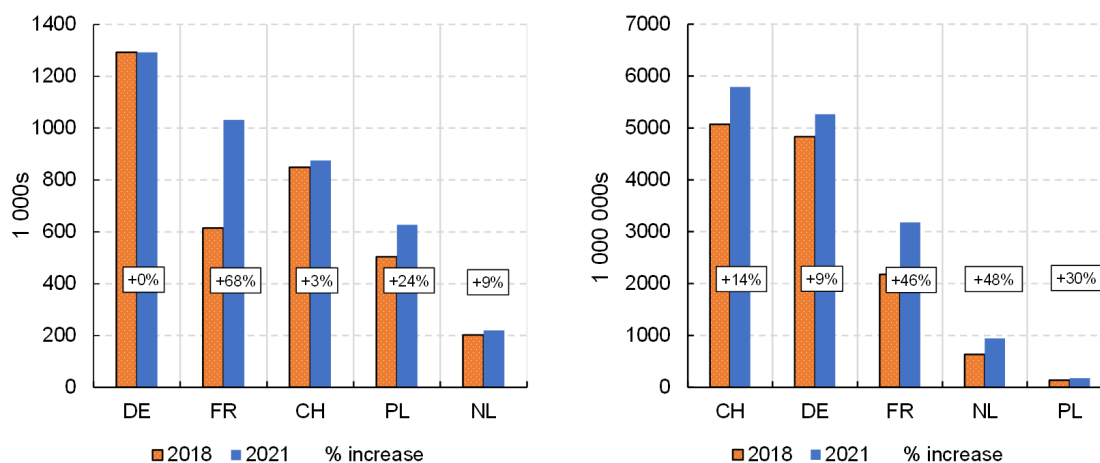
However, for pensions exported from Poland the situation is different. The total amount of pension exports paid (EUR 177 000 000) by Poland divided by the number of pensions exported (627 000) leads to an average annual value per exported pension of less than EUR 300. This is less than what one would expect even when taking into account that the average annual pension in Poland was EUR 5 721 in 2020, compared to an EU/EFTA average of EUR 15 504, or an average of EUR 18 248 in Germany (the main destination country for Polish movers) in 2020¹³⁶, and that mobility spells might in general be of shorter duration.

Main exporting countries of cross-border pensions

The evolution of the number of exported pensions varies considerably among the top exporting countries of Germany, France, Switzerland, Poland, and the Netherlands.

¹³⁶ Source: ESSPROS [spr_pns_ben] [spr_exp_pens], Milieu calculations.

Figure 55: Top 5 countries of pensions exported (2018 and 2021)
Number of beneficiaries (left) and increase (in %), and amount paid (right, in EUR) and increase



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

Note: The growth rate shown for France for the 2018-2021 period is artificially inflated due to a change in the reporting of exported pensions from 2021 onwards.

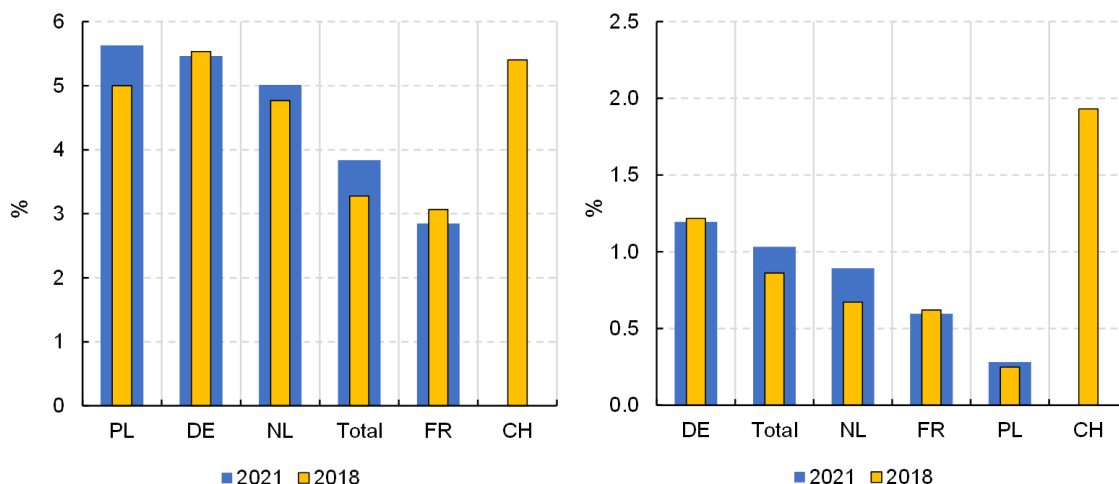
Over the 2018-2021 period, we see different trajectories between the top five exporting countries. The number of pensions exported from Poland increased by 24%, from the Netherlands by 9% and Switzerland 3%. The increase of 68% for France is largely linked to the change in reporting from 2021 onwards; otherwise, the figures would – similar to the situation for Germany – show no increase. This compares with an EU/EFTA increase of 4%.

Looking at the growth in the amount paid in exported pensions from 2018 to 2021, the Netherlands led with a 48% increase, followed by a 30% increase in Poland. The increase shown by Switzerland and Germany over the same period were at 14% and 9% respectively. Thereby only the Netherlands show an increase in the value of exported pensions, suggesting that the average value of an exported pension has increased beyond general adaptations of pensions to price increases. For France, the enormous increase in reported pensions comes with a somewhat lower average value per exported pension.

Pension exports versus national pensions in main exporting countries

In 2021, the number of exported pensions accounted for 5-6% of national pensions in Poland (6%), Germany (5%), and the Netherlands (5%) (Figure 56). In terms of value, exported pensions made up around 1% of total national pensions in Germany and the Netherlands, about 0.6% in France, and around 0.3% in Poland in 2021. Except for the Netherlands, little change is visible in comparison to 2018. In Switzerland in 2018 (latest year for which national pension data is available), exports accounted for 2% of national pension spending.

Figure 56: Top 5 countries of exported pensions – Number of exported pensions as a proportion of national pensions (left), and amount of exported pensions as proportion of national pensions (right), 2018 & 2021

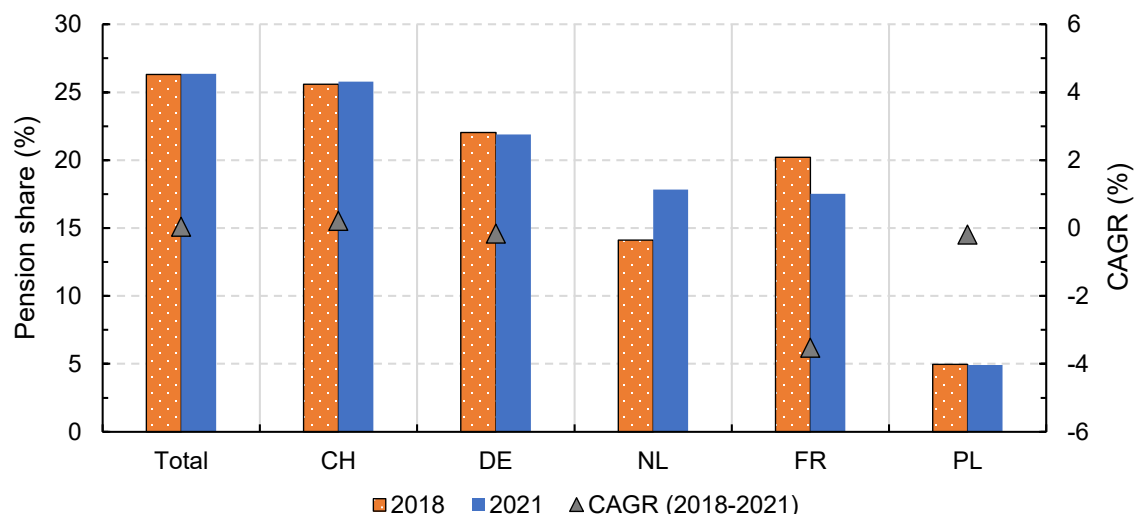


Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculation s; ESSPROS [spr_pns_ben] [spr_exp_pens], Milieu calculations.

Note: The evolution of exported pensions from France for the 2018-2021 period is artificially inflated due to a change in the reporting of exported pensions from 2021 onwards. 2020 is the latest national pension data (ESSPROS) available for France and Poland. 2018 is the latest national pension data available for Switzerland. 2020 is the latest national pension data used for 'Total' (EU/EFTA) due to 2021 data missing for a significant number of countries.

Figure 57 shows that in 2021, the average exported pension was 26% of the average national pension for the EU/EFTA as a whole. It was slightly less for Switzerland. For Germany, the value stood at 22%. These values have hardly changed over the 2018-2021 period. For the Netherlands the share increased from 14% to 18% over the period considered while it decreased for France from 20% to 18%. Poland remained at 5% over the four-year period.

Figure 57: Top 5 countries of exported pensions – average exported pension amount as a share of average national pension amount paid, 2018-2021

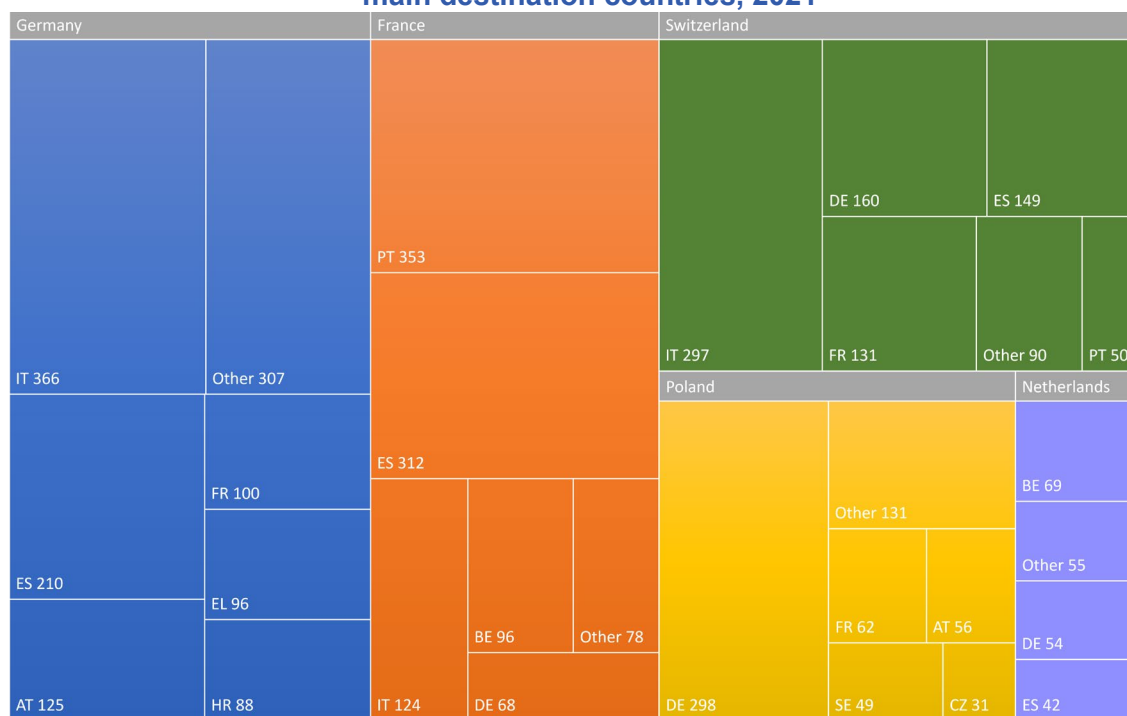


Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculation s; ESSPROS [spr_pns_ben] [spr_exp_pens], Milieu calculations.

Note: The evolution shown for France between 2018 and 2021 is artificial due to a change in the reporting of exported pensions from 2021 onwards. 2020 is the latest national pension data (ESSPROS) available for France and Poland. 2018 is the latest national pension data available for Switzerland. 2020 is the latest national pension data used for 'Total' (EU/EFTA) due to the significant number of countries missing data in 2021.

Looking at the top destinations of exported pensions (Figure 58), some patterns emerge: For example, Italy is a major destination for cross-border pensions from Germany (366 000), Switzerland (297 000) and France (124 000). Spain is an important destination for cross-border pensions from Germany (211 000), France (312 000), Switzerland (149 000) and the Netherlands (42 000). In terms of key country-to-country channels and their main exporting countries, Poland shows a very specific structure, with 298 000 pensions exported to Germany alone.

Figure 58: Top 5 exporting countries of pensions (beneficiaries, in 1 000s) and their main destination countries, 2021



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

4.4 Cross-border transfer of pension and labour mobility

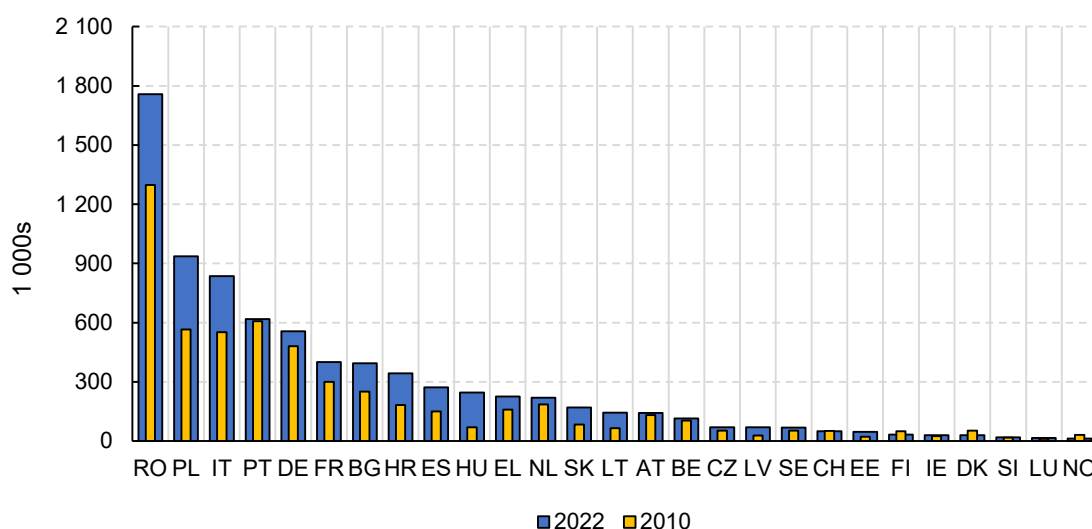
This section delves into the relationship between the main countries sending EU/EFTA active movers and the main countries to which cross-border pensions are imported.

4.4.1 Main countries of origin for labour mobility

EU/EFTA active movers by country

As for the top countries of destination, the main countries of origin of movers, synonymously called 'sending countries'¹³⁷, remained broadly stable over the 2010-2022 period (see Figure 59 below). Romania consistently occupied the top position, with an increase of nearly 460 000 active movers over this period. The increase in Polish (370 000) and Italian (283 000) active movers in the EU/EFTA was also substantial. The increase in German (75 000) and Portuguese (12 000) active movers was instead rather moderate.

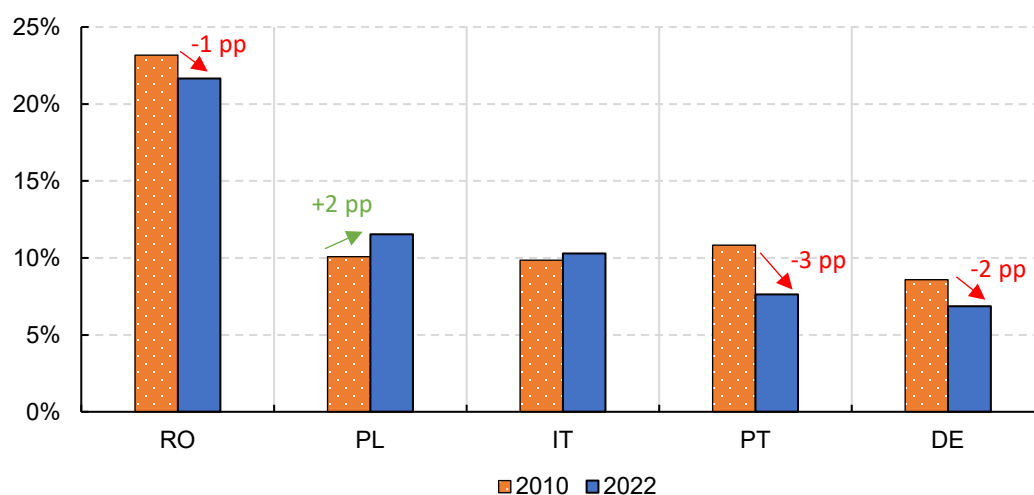
¹³⁷ Sending countries have been approximated by looking at the citizenship.

Figure 59: EU/EFTA active movers by country of origin, 2010 and 2022

Note: Movers = employed and unemployed only. To ensure better comparability, figures for 2010 exclude UK movers and UK as a destination country. Missing data Cyprus, Iceland, and Malta.

Source: EU-LFS 2022 and EU-LFS 2010, custom extraction by Milieu.

As shown in the figure below (Figure 60), three of the main countries of origin witnessed over the period 2010-2022 a reduction in their share of total active movers within the EU/EFTA, while the share for Italy remained stable, and increased by 2 percentage points for Poland. Overall these top five countries of origin accounted for around 62% of total labour mobility within the EU/EFTA in 2010 and 60% in 2022.

Figure 60: EU/EFTA active movers from top countries of origin as a share of total EU/EFTA active movers, 2010 and 2022

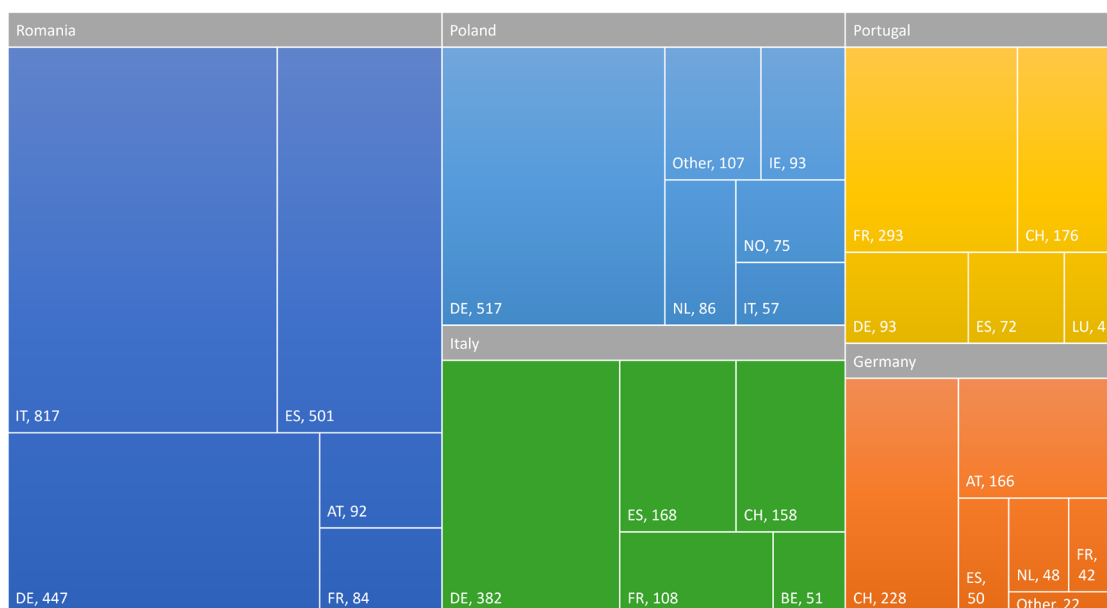
Note: Movers = employed and unemployed only. To ensure better comparability, figures for 2010 exclude UK movers. "pp" = percentage points.

Source: EU-LFS 2022 and EU-LFS 2010, custom extraction by Milieu.

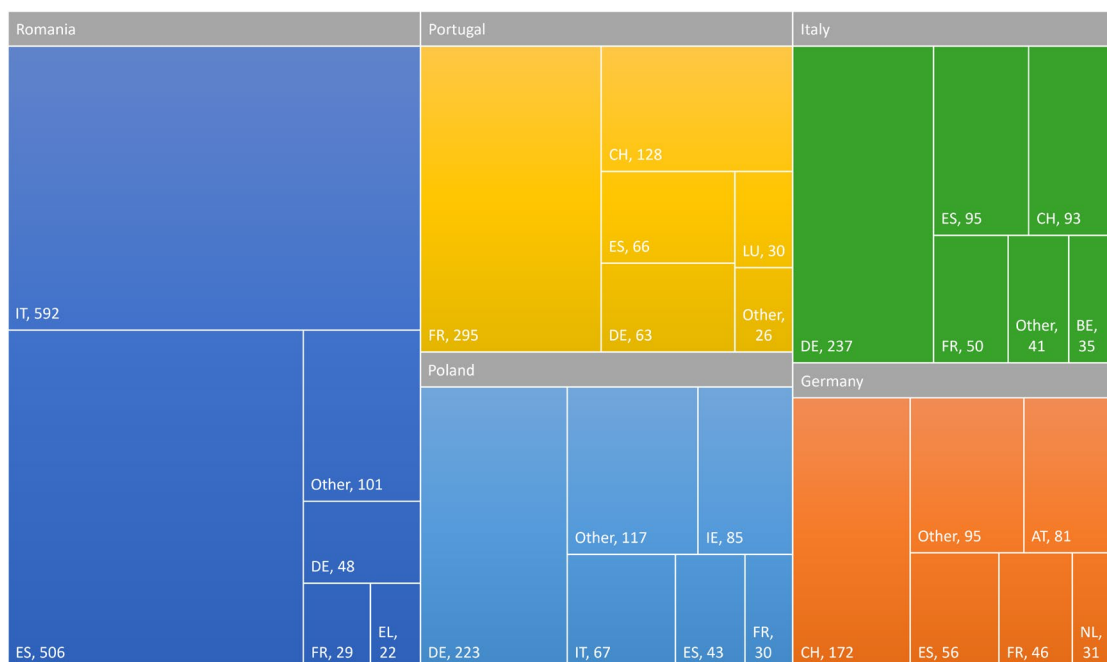
Between 2010 and 2022, the primary destinations for movers from the top countries of origin remained remarkably stable, as can be seen from the figure below.

Figure 61: EU/EFTA active movers from the main countries (in grey) by main destination countries, 2010 and 2022

a) 2022 (numbers in 1 000s)



b) 2010 (numbers in 1 000s)



Note: Movers = employed and unemployed only. Main countries of origin are those in grey in the figures. *How to read this graph:* 447 000 Romanian active movers went to work in Germany in 2022, while in 2010 this figure was 48 000. For 2022, data disaggregated by citizenship and country of destination, as well as including the employment status (active/inactive) was not available. As we are interested only in the active population, this had to be approximated. To do so, we considered the overall activity rate of movers from a specific Member State going to EU/EFTA countries (e.g., 81% of RO movers going to EU/EFTA are either employed or unemployed) and assumed that movers of the same nationality going to different Member States have the same activity rate (e.g., 81% of RO movers going to AT are either employed or unemployed). To ensure

better comparability, figures for 2010 exclude UK movers. When “other” is not displayed it means that no (reliable) flows could be identified from other countries of origin.

Source: EU-LFS 2022 and EU-LFS 2015, custom extraction by Milieu.

EU/EFTA cross-border workers by country

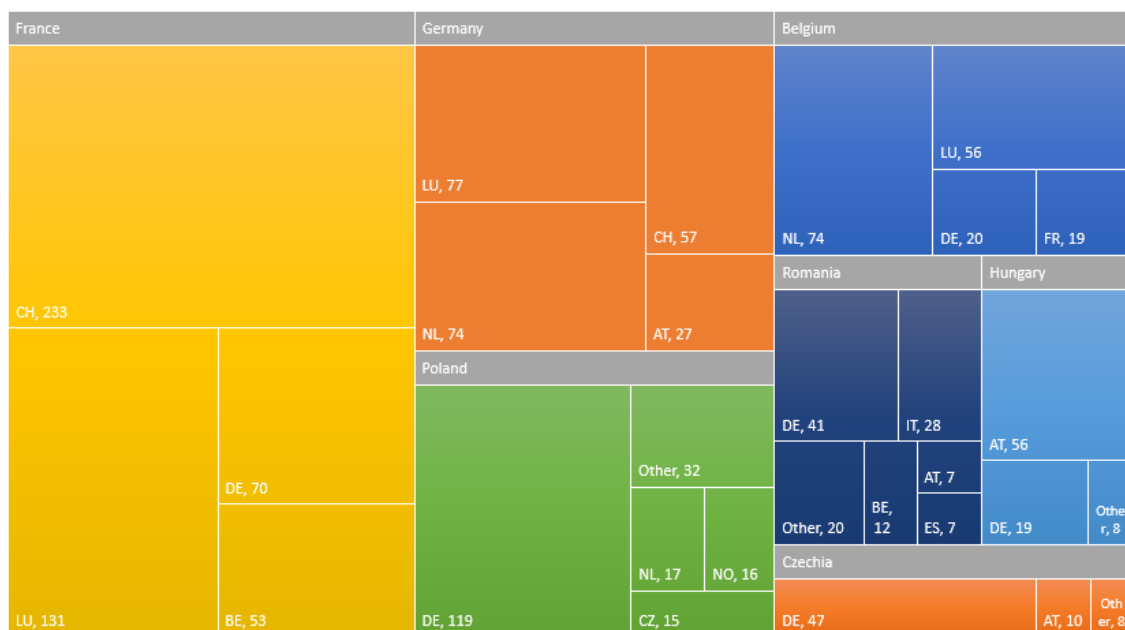
Cross-border workers generally reside in their country of nationality but work in another EU/EFTA country. This is expected to lead – when retired – to a cross-border pension from the previous country of work to the country of residence, the latter remaining unchanged.

As seen in Section 2.4.1 of this report, the main countries of origin in 2022 are France (451 000 outgoing cross-border workers), Germany (237 000), Poland (198 000), Belgium (127 000), Romania (115 000), Hungary (84 000) and Czechia (64 000). In contrast, in 2010 most cross-border workers came from France (302 000), Germany (225 000), and Slovakia (113 000), followed by Belgium (98 000), Poland (84 000), and Romania (60 000). While destination countries are more concentrated and stable throughout the years (see Section 4.3.1), the number of prominent countries of origin has expanded¹³⁸.

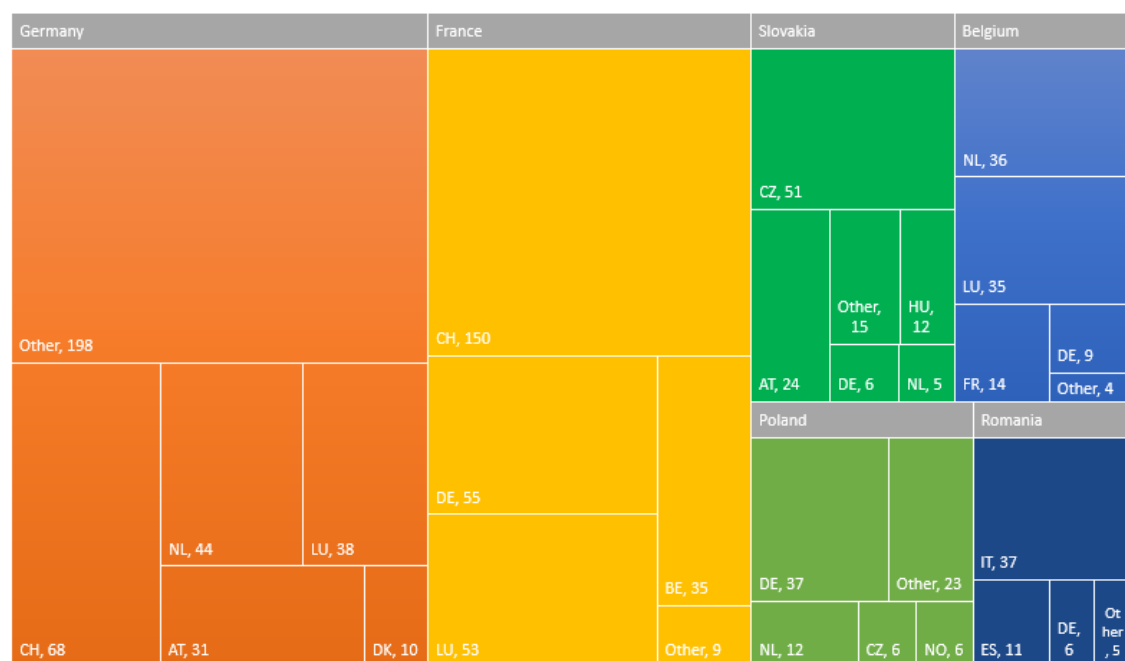
¹³⁸ Figures for 2010 exclude UK cross-border workers and UK as sending country to ensure a better comparability with 2022 figures.

Figure 62: EU/EFTA cross-border workers from the main countries of origin (in grey) by main destination countries, 2010 and 2022

a) 2022 (numbers in 1 000s)

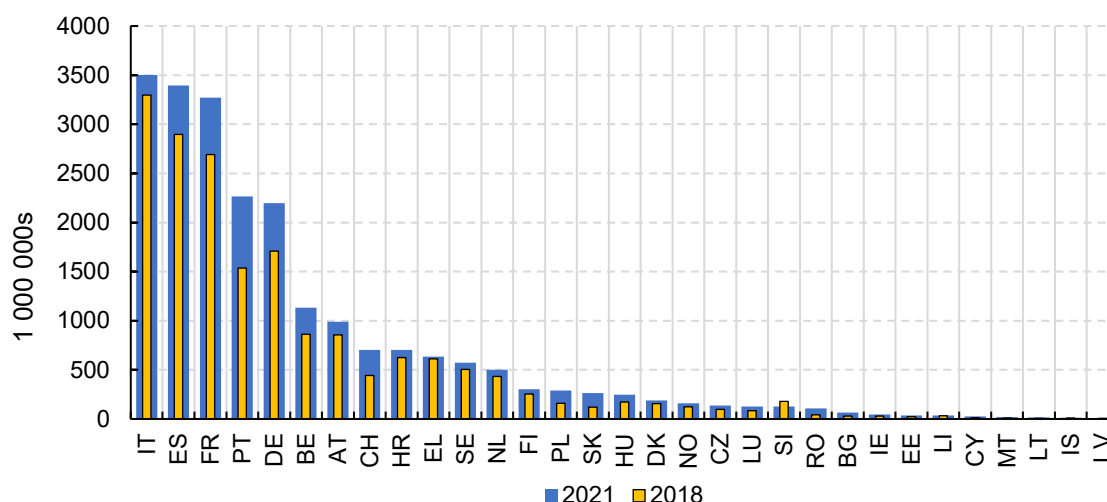


b) 2010 (numbers in 1 000s)



Note: The main countries of origin are those in grey in the figure. *How to read this graph:* 233 000 French cross-border workers went to work in Switzerland in 2022, this figure was 150 000 in 2010. To ensure better comparability, figures for 2010 exclude UK cross-border workers and UK as a destination/country of origin. Only main destination countries are shown for each

Figure 64: Amount paid in pension imports (in EUR 1 000 000s) at country level, 2018 and 2021

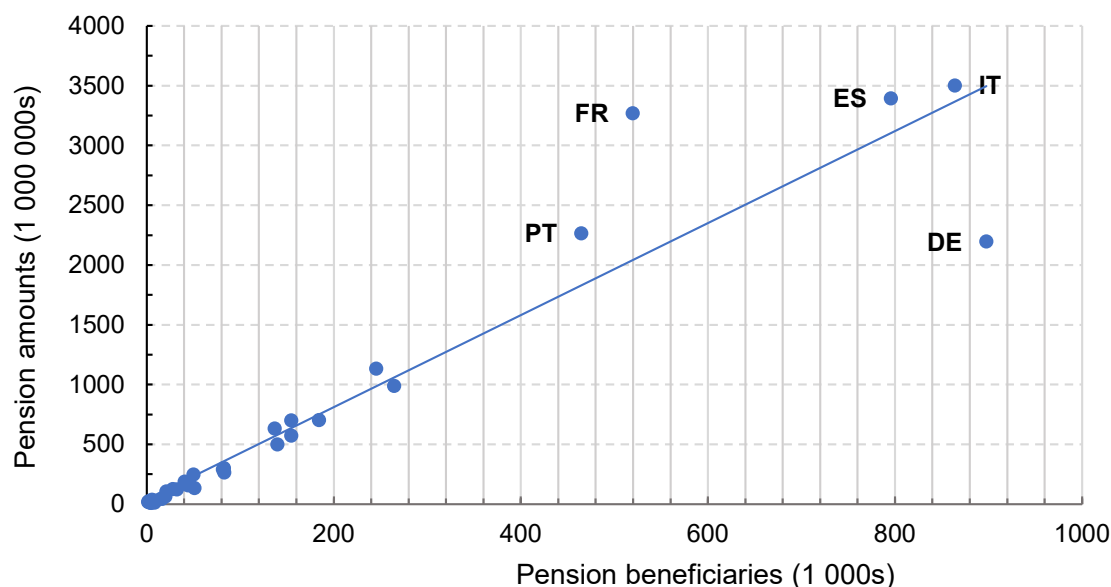


Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

Shifting focus from the number of beneficiaries to the amount paid in imported pensions, Italy leads with EUR 3.5 billion in 2021, up from EUR 3.3 billion in 2018 (Figure 64). Spain and France follow with EUR 3.4 billion and EUR 3.3 billion. Together, the five main receiving countries in 2021, Germany, Italy, Spain, France, and Portugal, accounted for two-thirds (66%), or EUR 14.6 billion out of EUR 22.1 billion.

Similar to the trends in the number of imported pensions, we see that the amount paid in cross-border pensions has increased markedly year on year in countries reporting relatively fewer cross-border pensions. This includes Romania, with the highest average annual growth rate of all EU and EFTA countries at 27% for the 2018-2021 period, followed by Slovakia, Lithuania, and Bulgaria with 20-21%. Thereby the number (beneficiaries) and volume (amount paid) of imported pensions correspond rather well (Figure 65). Minor deviations of this trend can be seen among the largest importing countries of cross-border pensions (Figure 65). For example, the relatively low pension amounts in Germany can be explained by the number of pensions received from Poland, which are generally of low value. On the other hand, the relatively high pension amounts in France can be partly explained by the many retired cross-border workers receiving pensions from Switzerland and Luxembourg. Otherwise, the pension amounts and numbers of beneficiaries in Portugal, Spain and Italy are generally close to the average trend line.

Figure 65: Pension imports at country level, 2021: amounts paid (in EUR 1 000 000s) & number of pension beneficiaries (in 1 000s), top five countries highlighted

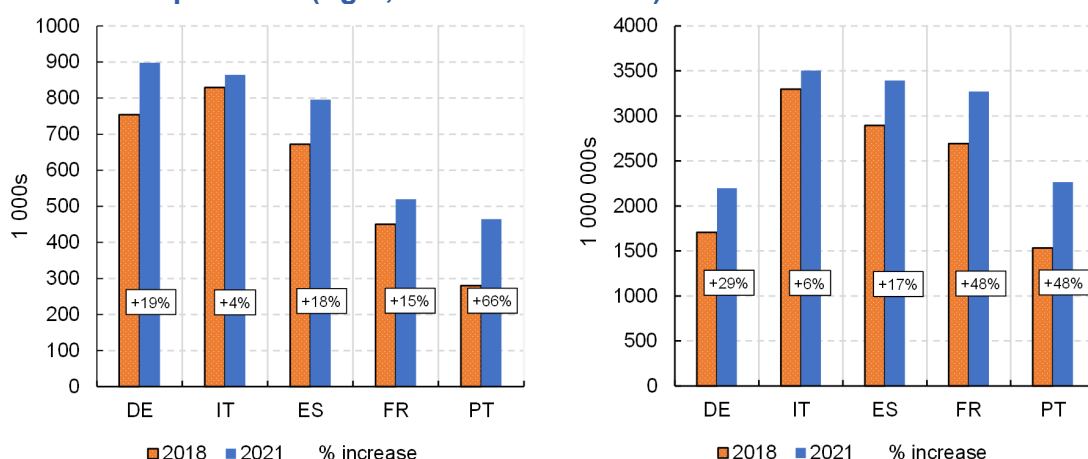


Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

Main importing countries of cross-border pensions

The above results show that the top importing countries Germany, Italy, France, Spain, and Portugal accounted for two thirds of all imported pensions, both in terms of number of beneficiaries and amount paid. These five countries together exhibit average annual growth rates in line with the EU/EFTA average over the 2018-2021 period, at 4% (beneficiaries) and 5% (amount paid out).

Figure 66: Top 5 countries of import-- Number of imported pension beneficiaries (left, in 1 000s) and 2018-2021 increase (in %), and amount paid in imported pensions (right, in EUR 1 000 000s) and 2018-2021 increase



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

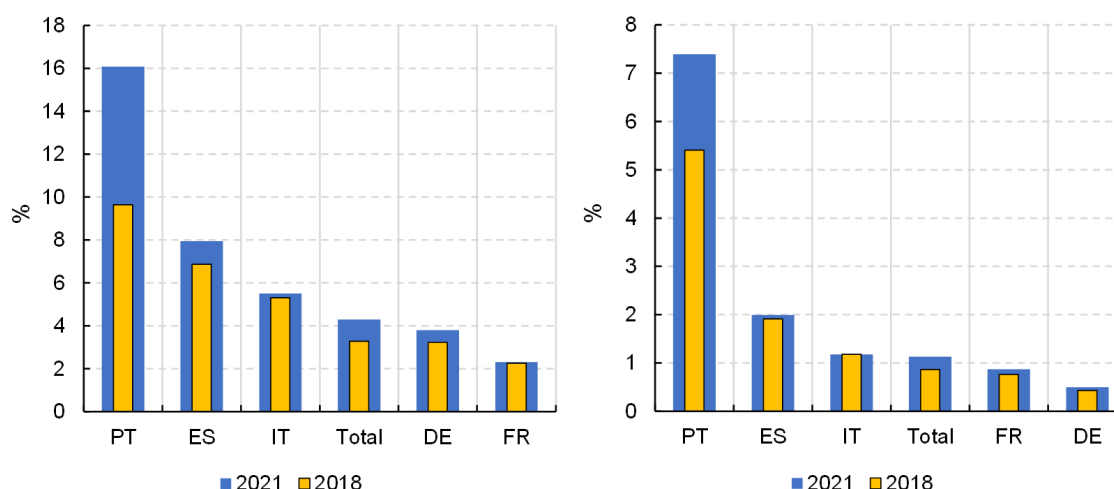
Among the five main importing countries, the growth in number of pensions paid to pensioners residing in Germany, Spain and France are on a similar trajectory, increase by 15-19% from 2018 to 2021 (Figure 66). Italy, despite also importing a comparatively high number of pensions, reports an increase of only 4% over the same period (approximately +35 000 beneficiaries). The standout, however, is Portugal, which saw a 66% increase over

the four-year period, from 280 000 imported pensions in 2018 to 465 000 in 2021. This broadly corresponds to the changes in the amounts of pensions paid out in the same countries.

Pension imports versus national pensions in main importing countries

To better understand the relative importance of pension imports in each country, imported pensions are compared with total national pensions (Figure 67).

Figure 67: Top 5 countries of import - Number of imported pensions as proportion of total national pensions (left), and amount paid in imported pensions as proportion of total national pensions paid (right), 2018 and 2021



Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations; ESSPROS [spr_pns_ben] [spr_exp_pens], Milieu calculations.

Note: 2020 is the latest national pension data (ESSPROS) used for 'Total' (EU/EFTA) due to the significant number of countries missing data in 2021. 2020 is the latest national pension data available for France. 'Total national pensions' do not include cross-border pensions.

The number of pensions imported as a proportion of national pensions¹³⁹ varies considerably. For example, in Portugal, the proportion of imported pensions corresponded to 16% of national pensions in 2021, while in France, pension imports corresponded to just 2% of national pensions¹⁴⁰.

The notable increase in Portugal between 2018 and 2021 must be seen in the context of the total number of retired movers in 2021 (1 366 000) and the annual increase of retired movers of around 2% over the same period (Figure 42). Taken together this indicates that a large part of the increase is due to retired returnees, although the increased number of retired movers is likely to have contributed as well. The picture is much more stable in other major importing countries, namely Germany and Spain, seeing slight increases in pension imports as a proportion of national pensions from 2018 to 2021. By contrast, the situation in Italy has remained unchanged over the four-year period.

Looking at the amount paid in imported pensions in relation to the amount of national pensions highlights further differences between the major importing countries (Figure 67). In 2021, imported pensions represented 7% of the value of total national pensions in Portugal, 2% in Spain and at around or less than 1% in Italy, France¹⁴¹, and Germany.

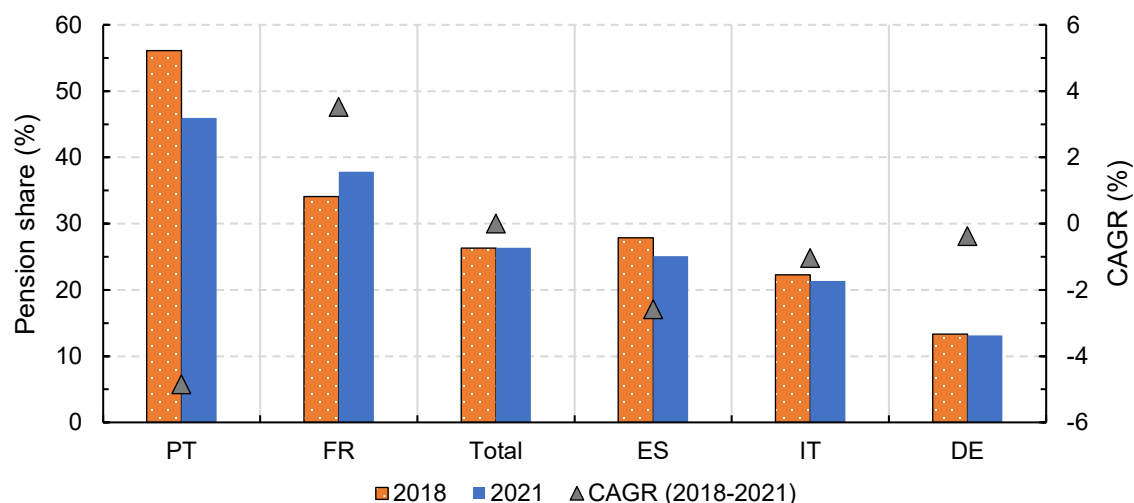
¹³⁹ Figures used for national pensions do not include cross-border pensions.

¹⁴⁰ 2020 is the latest year available for the total number of pensions in France.

¹⁴¹ 2020 data is used.

Thereby the share of imported pensions in relation to national pensions is higher than the share of the value of imported pensions in relation to the value of national pensions. This difference is to be expected, as exported pensions mostly concern only a part of a person's working life.

Figure 68: Top 5 countries of import – average imported pension amount paid as a proportion of average national pension amount paid, 2018-2021

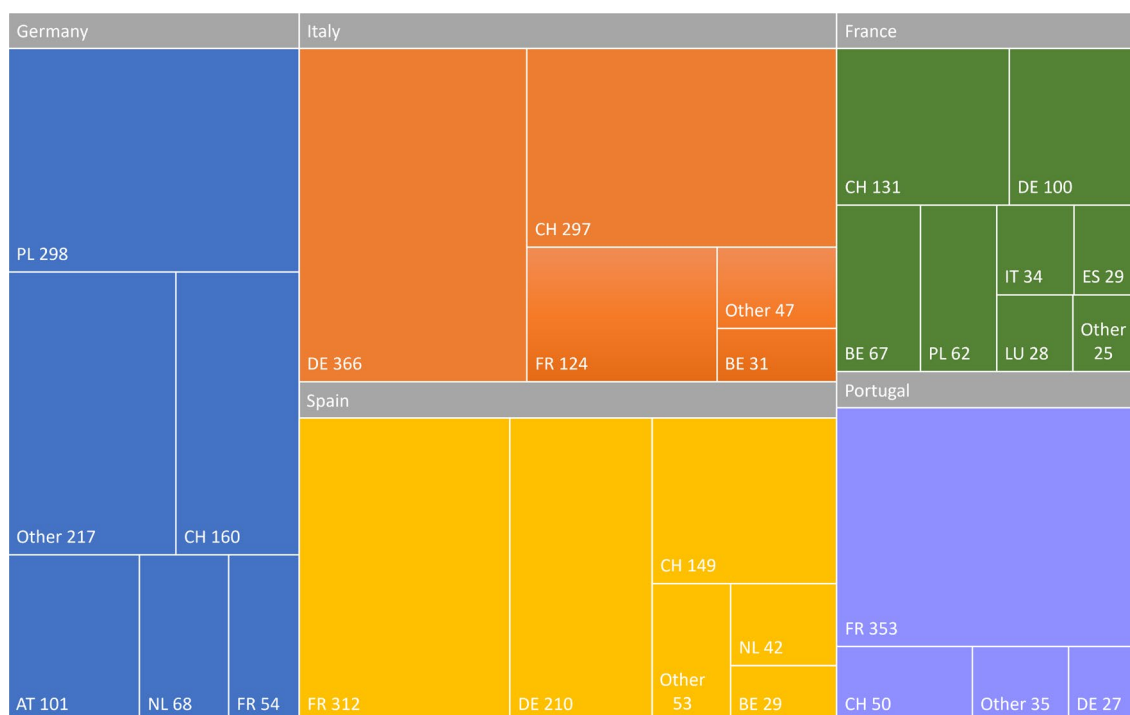


Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations; ESSPROS [spr_pns_ben] [spr_exp_pens], Milieu calculations. (CAGR : compound average growth rate, i.e. mean annual growth rate)

Note: 2020 is the latest national pension data (ESSPROS) used for 'Total' (EU/EFTA) due to the significant number of countries missing data in 2021. 2020 is the latest national pension data available for France.

Comparing the average volume of imported pensions with average national pensions shows that imported pensions are significantly lower in value than national pensions (Figure 68). However, the extent of this difference varies. The average imported pension in Portugal represented 46% of the national average in 2021, compared to just 13% in Germany. The reasons for these differences are manifold: ranging from the general price, income and subsequently pension level in the country, the relative importance of the statutory pension system (compared to, for example, supplementary pension systems), to the quality and duration of employment covered by the imported pension.

To better understand the flows of cross-border pensions, Figure 69 shows from which countries the pensions are exported to the main 'importing' countries.

Figure 69: Top 5 importing countries of pensions (beneficiaries, in 1 000s) and their main exporting countries 2021

Source: 2021 KU-Leuven Cross-border pension data base, Milieu calculations.

Overall, Figure 69 shows that there is a notable trend of pensions being exported from western European countries to southern Europe. For example, a significant number of exported pensions from Germany are sent to Italy (366 000) and Spain (210 000), while more than half of pensions exported from France are sent to Portugal (353 000) and Spain (312 000), indicating that there are key country-to-country channels of pension mobility.

4.5 Comparing trends in labour mobility and cross-border pensions

This section compares the trends in labour mobility and cross-border pensions, by assessing whether flows of movers and cross-border pensions go in opposite directions, as one could assume in the presence of return mobility and cross-border work.

4.5.1 Comparing trends in labour mobility and exported pensions

Several conclusions can be drawn from comparing trends in labour mobility and the export of pensions.

The most popular destination countries for EU/EFTA movers have remained relatively stable over the years, with Germany, Spain, Switzerland, Italy, France, Austria, Belgium, and the Netherlands at the forefront. The most popular destination countries for cross-border workers have also been relatively stable, with Germany, Switzerland, Luxembourg, Austria, the Netherlands, Belgium, and the Netherlands leading. Germany, Switzerland, Italy, France, Austria, and the Netherlands are also primary exporters of cross-border pensions. At first sight, these similarities seem to corroborate an inverse relationship between the countries that attract the most active EU/EFTA movers and cross-border workers and the same countries that export the highest number of pensions, as assumed by the simple hypothetical scenario.

Signs of this inverse relationship are further evident when looking at the country-to-country flows for the main exporting countries of pensions, including:

- Germany: The main destination countries of German pension exports are Italy, France, Austria, Greece, Austria, and Croatia, and Spain. All these countries except Spain also appear as the main countries of origin for labour mobility to Germany.
- France: The main destination countries of French pension exports are Portugal, Spain, Italy, Belgium, and Germany. These countries are also the main countries of origin for labour mobility to France.
- Switzerland: The main destinations countries of Swiss pension exports are Italy, France, Portugal, Germany, and Spain. These countries are the main countries of origin for labour mobility to Switzerland.
- The Netherlands: The main destination countries for Dutch pension exports are Belgium, Germany, and Spain. The first two countries are top countries of origin for labour mobility to the Netherlands.

However, this inverse relationship is imperfect. While Spain and Luxembourg are important destination countries for mobile labour, they do not rank among the top exporting countries of cross-border pensions. In fact, Spain is a rather important country for cross-border pensions. Reciprocally, while Poland appears among the main exporting countries of cross-border pensions, it is not a main destination country for mobile labour. On the contrary, it is a major country of origin for active movers.

4.5.2 Comparing trends in labour mobility and imported pensions

The major countries of origin of EU/EFTA active movers have remained stable over the years, with Romania, Italy, Portugal, Poland, and Germany leading the way. The main countries of origin of cross-border workers have also stayed relatively stable. These countries include France, Germany, Poland, Belgium, and Romania. However, the position of Slovakia has deteriorated to the benefit of Hungary and Czechia. Some of these countries, including Germany, Italy, France, and Portugal are also important importers of cross-border pensions. These similarities seem to affirm an inverse relationship between these latter countries in terms of their position as countries of origin for mobile labour and as countries of residence for pensioners receiving cross-border pensions.

Evidence of this inverse relationship is further supported when looking at the flows between the main pension-importing countries:

- Germany: The main exporting countries of pensions received in Germany are Poland, Switzerland, Austria, the Netherlands, and France. All of these countries, with the exception of Poland, appear also as the main destination countries for active movers from Germany.
- Italy: The main exporting countries of pensions received in Italy are Switzerland, Germany, France, and Belgium. These countries are also the main destination countries for active movers from Italy.
- France: The main countries of origin of pensions imported in France are Switzerland, Germany, Belgium, Poland, Luxembourg, Italy and Spain. These countries are also the main destination countries for active movers from France.

- Portugal: The main sending countries for pensions imported in Portugal are France, Switzerland, and Germany. These are also the top destination countries for active movers from Portugal.

Nevertheless, the inverse relationship is imperfect. Czechia, Romania, Hungary, Belgium, and Slovakia are significant countries of origin for active movers, but they are not main importing countries of cross-border pensions. In fact, among these countries, Belgium stands out as a main exporting country of cross-border pensions. Reciprocally, while Spain is a top importing country of cross-border pensions, it is not a major country of origin for active movers. Instead, it is a main destination country.

4.5.3 Exported pensions and their link with mobility

The above-mentioned developments indicate that there is a negative relationship between the flows of active movers and cross-border workers. However, a comparison of trends in labour mobility and cross-border pensions indicates that such a relationship does not always hold, highlighting the multifaceted nature of intra-EU mobility and cross-border pensions within the EU/EFTA region. Part of this may be due to the fact that data on cross-border pensions can obscure a range of scenarios involving movement between countries, such as pensioners moving to a country for retirement where they have no previous work history (Box 5), or active movers staying in their host country after retirement. Moreover, the imperfect correlation can be attributed to the legal and organisational structures underlying pension regions at the national level, in particular the main principles of coordination applicable to statutory old-age pensions (Box 3). Finally, there is a time lag between labour mobility and pension transfer. This 'time lag' depends on the individual employment biography and may further explain the incomplete inverse relationship observed in some countries.

Box 5: European snowbirds: statistically relevant?

As mentioned above, different situations can drive the export of pensions. References are often made in the media to pensioners who move to a 'new' country, i.e. a country different from their country of citizenship and previous work. In this case, their pension would need to be exported. They would be considered as retired movers and recipients of an exported pension. However: how many such cases can be expected to live in the EU/EFTA?

The typical image of such persons, which has earned them the title of 'snowbirds', is that they are drawn to countries with warmer climates and lower costs of living relative to their countries of origin. This is partly supported by the literature¹⁴². Typical movement patterns would entail pensioners from northern Europe who relocated to southern European countries, such as Portugal, Spain, and Italy¹⁴³.

As identified in section 4.2, the number of mobile retirees within EU/EFTA is at 1.4 million, of which more than 516 000 are in Germany, which does not fulfil the criteria for a 'snowbird destination' (neither climate-wise nor concerning relatively low costs of living). Furthermore, Belgium (119 000), the Netherlands (34 000), Luxembourg (16 000) and Switzerland (124 000), other countries with sizeable populations of retired movers, do not fit into this picture.

¹⁴² Savaş, E. B., Spaan, J., Henkens, K., Kalmijn, M., and van Dalen, H. P. (2023). '[Migrating to a new country in late life: A review of the literature on international retirement migration](#)', *Demographic Research*, vol. 48, no. 9, pp. 233-270.

¹⁴³ Egidi, G., Quaranta, G., Salvati, L., Gambella, F., Mosconi, E. M., Morera, A. G., and Colantoni, A. (2020). '[Unraveling Causes and Consequences of International Retirement Migration to Coastal and Rural Areas in Mediterranean Europe](#)', *Land*, vol. 9, no. 11, pp. 1-15.

Among the countries that are potentially attractive to snowbirds, France, Spain, Portugal, and Greece have significant populations of retired movers. This figure amounts to a maximum of 447 000 retired movers living in these countries. However, not all of these persons can be considered 'snowbirds'. Some may have worked in the country before, while others may have moved to the country because their partner is from there.

In conclusion, while there may be pensioners who move for – a part of – their retirement to more 'pleasant places', in most cases this is unlikely to be a complete farewell from the previously established place of residence. As such, they are often neither registered as (retired) movers nor as recipients of an exported pension. Instead, they might be 'snowbirds' in the full sense of the word: living at a different place at different times of the year.

In any case, the transfer of pensions is essential to ensuring fair labour mobility across EU and EFTA countries. The information available reveals a positive co-evolution between cross-border exports of pensions and labour mobility at EU and EFTA level.

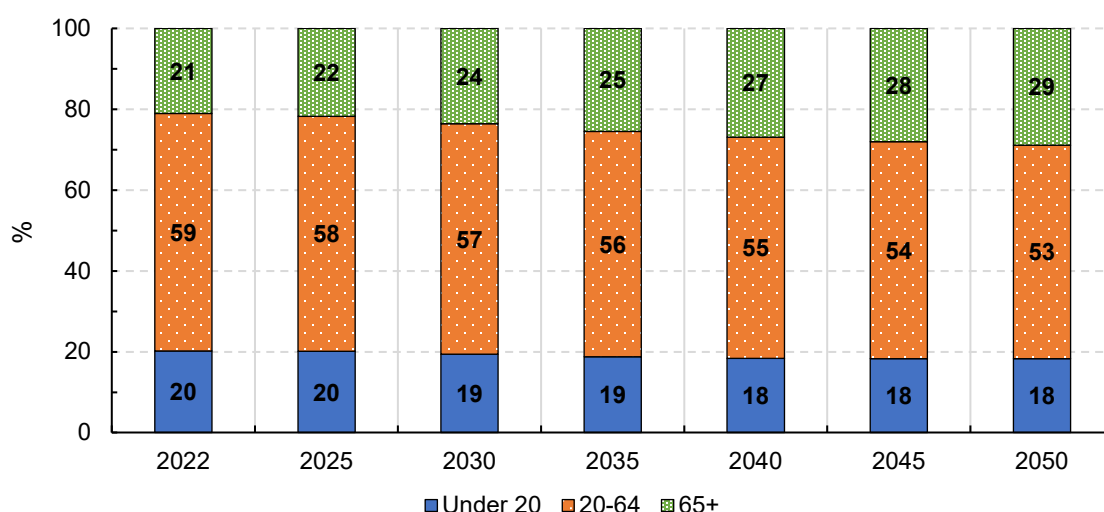
Future trends in cross-border pensions

The data presented in this chapter, together with broader demographic projections for Europe, suggest that the number of exported pensions will increase in the coming years, probably outpacing the growth of active movers. This is driven in part by the growth of intra-EU labour mobility, which has been increasing for almost two decades, with the number of economically active movers aged 20-64 rising from 6 528 000 in 2008 to 8 112 000 in 2022, while over the same period, the share of the workforce that is mobile has risen from 2.8% to 3.8%. By comparison, the number of exported cross-border pensions in the EU/EFTA has increased considerably over the 2018-2021 period.

At the same time, there is a time lag between the increase of labour mobility and the export of pensions, as well as demographic changes resulting in pensioners representing a growing share of the population across the EU/EFTA (Figure 70), suggesting that further growth to the number of cross-border pensions is forthcoming. For instance, the median age of the EU27 population has grown from 40.6 to 44.4 between 2008 and 2022, while the proportion of the population aged 65 years and more has increased by 3.8 percentage points over the same period¹⁴⁴.

Compounding these trends, movers from major central and Eastern European countries of origin such as Poland and Romania will retire in greater numbers in the coming years. For example, many Polish and Romanian citizens who worked abroad in western European countries (i.e. Germany and France) following the 2004 and 2007 EU enlargements have not yet reached retirement age, but are approaching retirement. As such, practical coordination of pension regimes between the key destination countries and these countries will become even more frequent.

¹⁴⁴ Eurostat[demo_pjanind], Milieu calculations.

Figure 70: EU/EFTA demographic projections by age, 2022-2050

Source: Eurostat[proj_23np], Milieu calculations.

It remains to be seen which share will return to their country of origin and which share will decide to stay in the country to which they have moved, both movement scenarios are likely to result in the export of a pension from one country to another, and the continued growth of cross-border pensions in the EU/EFTA as a whole. These expected developments, in turn, require that the coordination of cross-border pensions between EU and EFTA countries has the necessary capacity to ensure the smooth functioning of the system in the face of the likely future increase in pension mobility.

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Annex B: Methodological notes

B.1: Definitions and measurements

When measuring labour mobility for the purposes of supporting policy-making, it is important that what is captured empirically relates to what is defined by the legislation. The box below explains the groups covered and defined by the EU legislation on free movement, and their measurement in this report.

Legal concepts and definitions	Statistical concept and definition
Free movement of citizens	EU movers
EU citizens and their family members have the right to move and reside freely within the territory of the Member States. However, the right of residence for more than three months is only granted to EU citizens and their family members if they are workers or self-employed in the host Member State; inactive EU citizens have the right to reside in another Member State for more than three months if they have sufficient resources for themselves and their family members not to become a burden on the host Member State, if they are enrolled at a private or public establishment and if they have comprehensive sickness insurance cover ¹⁴⁵ .	EU movers are defined as EU citizens who have their usual residence in a Member State other than their country of citizenship (stock), or who moved their usual residence to a Member State other than their country of citizenship in a given period of time (flow). Unless otherwise specified it concerns EU-27 citizens. The concept of 'usual residence' is reflected similarly in Eurostat population statistics and the EU-LFS. All three sources refer to the usually resident population as those persons who have resided, or intend to reside, in a country for at least 12 months ¹⁴⁶ . The report focuses on EU movers who were also born outside their current country of residence. However, this distinction is only possible for figures based on EU-LFS. When referring to population and migration statistics, all persons which do not have the citizenship of the respective Member State are looked at.
Workers and jobseekers enjoying the right to free movement	Active EU movers
The notion of worker is only defined through case law – based on this, it can be considered that '(mobile) workers' are EU citizens who are in an employment relationship, and who carry out real and genuine activities which are not purely marginal and ancillary, in a Member State other than their state of citizenship ¹⁴⁷ . While legislation speaks in some instances of migrants or 'EU-migrants' this report uses the concept of mobile worker/ mover, to distinguish between EU citizens using their right to free movement and third-country nationals which are considered as migrants. Furthermore, EU legislation stipulates that for the purposes of the right of residence in another EU Member State of more than three	The legal concepts of mobile workers and jobseekers are approximated by looking at 'active EU movers'. These include EU-28 citizens who are employed or unemployed in an EU Member State other than their country of citizenship (and were born outside that country, see above). The main data source for looking at this group is the EU-LFS. According to EU-LFS methodology, the group of 'employed' includes persons who did any work (one hour or more) for pay or profit during the reference week, 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

¹⁴⁵ Directive 2004/38/EC, Art. 7

¹⁴⁶ E.g. Eurostat (2019), 'Population (national level) (demo_pop)', *Reference Metadata in Euro SDMX Metadata Structure*, point 3.4; Eurostat (2018).

¹⁴⁷ Directive 2004/38/EC and CJEU case law. See also Verschueren (2015), 'Free movement of workers: the role of Directive 2014/54/EU in tackling current and future challenges', *Presentation at the 2015 Equinet conference*, Universiteit Antwerpen, Antwerpen.

Legal concepts and definitions	Statistical concept and definition
months, Union citizens who are no longer employed or self-employed can retain their status as workers under certain conditions or move to the status of jobseekers ¹⁴⁸ . EU citizens have the right to move to another Member State to look for work and to receive the same assistance from national employment offices; they have the right to reside in another Member State with the status of 'jobseeker' as long as they continue to seek employment and have a genuine chance of being engaged ¹⁴⁹ .	within three months, or who are actively seeking employment and are available to work ¹⁵⁰ .
Frontier workers, seasonal workers	Cross-border workers
Frontier workers are defined as cross-border workers who return to their country of residence 'as a rule daily or at least once a week'¹⁵¹. This definition stems from Regulation (EC) No 883/2004 which assigns specific rights to social security to such workers and their family members. Directive 2014/36/EU concerning seasonal workers from third countries defines these workers as migrants who come to work in a Member State for a limited duration. Intra-EU seasonal workers benefit from the right to free movement and equal treatment like any other EU worker.	The EU-LFS explicitly asks for respondents' 'country of place of work' which may be different to the country of residence, and which allows for cross-border workers to be identified. However, the survey does not ask for the frequency of commute nor of the underlying employment relationship. Cross-border workers therefore include frontier workers as well as longer-term posted workers and seasonal workers. Given the small number of longer postings and the likely underrepresentation of posted as well as of seasonal workers in a sample-survey like the LFS, these figures are, however, not very reliable.

B.2: Main data sources

EU Labour Force Survey (EU-LFS)

The EU-LFS is a large household sample survey providing quarterly and annual results on labour participation of people aged 15 and above. The EU-LFS measures employment, unemployment, and inactivity, and also collects other information on the resident population, in particular citizenship, which can be used to produce estimates of the number of EU citizens living/working in another Member State. EU-LFS data is therefore the best EU wide source to estimate numbers of active EU movers (mobile workers). In addition, it can provide more information about specific characteristics of EU mobile citizens, such as age and gender, sector of employment, occupation, education level, etc.

Since the EU-LFS has a legal basis¹⁵², data collection in the Member States are harmonised to a considerable extent. Comparability of figures is ensured by using the same concepts and definitions especially the ILO definitions of employment and unemployment; using common classifications (NACE, ISCO, etc.); and recording the same set of characteristics in each country.

¹⁴⁸ Directive 2004/38/EC.

¹⁴⁹ Regulation (EU) No 492/2011, Art. 5; Directive 2004/38/EC, Art. 14(4)(b); Verschueren (2015).

¹⁵⁰ Eurostat (2021). Refer especially to p. 55 and the description of variables WSTATOR and SEEKWORK.

¹⁵¹ Regulation (EC) No 883/2004, Art. 1(f).

¹⁵² Originally Regulation (EEC) No 577/98 of 9 March 1998 on the organisation of a labour force sample in the Community. This was subsequently amended by Regulation (EU) 2019/1700 establishing a common framework for European statistics relating to persons and households, based on data at individual level collected from samples.

Microdata are accessible for researchers.

The EU-LFS has the following distinct advantages:

- For some countries, it is the only source with the suitable frequency of data on the stocks of EU foreigners broken down by citizenship.
- EU-LFS data are available on a quarterly basis and published around four months after data collection, making it possible to identify recent trends.
- The EU-LFS provides information about the length of time for which foreigners have been established in the country. It thus enables an estimate of the inflows that occurred over a certain time and helps to distinguish recent movers from those who have been in the country for a longer time.
- While the EU-LFS data might underestimate the absolute numbers of mobile workers in a country (stock), it is likely to give a reasonable indication of the changes over time (flows).
- It includes many variables related to the employment situation and socio-demographic profile of respondents.

However, estimations of 'EU movers' can suffer the following limitations¹⁵³:

- Mobile citizens might be underrepresented in the survey with the extent of underrepresentation being unclear (e.g. not registered, non-responding), thus making an extrapolation of the real size more difficult and less predictable than when using a census.
- Small sample sizes of EU movers reduce the possibility of providing detailed analysis of data (e.g. a combined analysis of the employment and skills profile of mobile workers in countries with few movers is impossible).
- Under-coverage of recently arrived foreigners due to delay in entering the reference sample frame.

As a result, EU-LFS estimations of stocks of EU foreigners are consistently lower than figures from migration statistics, as has been noted over the past years.

Population statistics (including international migration statistics)

International migration flows by groups of citizenship, groups of country of birth, groups of country of previous/next usual residence, age and sex and population stocks by groups of citizenship, groups of country of birth, age and sex are collected based on Regulation (EC) No 862/2007 (EU Regulation, 2007)¹⁵⁴ and related Implementing Regulations.

Eurostat population statistics provide data on the *stocks* of foreigners/foreign-born persons on 1 January of the reference year¹⁵⁵. For the purpose of harmonisation, Eurostat recommends the definition of 'population on 1 January' to refer to the 'usually resident

¹⁵³ European Commission (2008), 'Employment in Europe 2008', European Commission (DG EMPL), Brussels, p. 103; Eurostat (2022g).

¹⁵⁴ Regulation (EC) No 862/2007 .

¹⁵⁵ This is collected in datasets [Migr_pop1ctz], [Migr_pop2ctz], [Migr_pop3ctb], [Migr_pop4ctb], [Migr_pop5ctz] and [Migr_pop6ctb]. In the codes 'CTZ' refers to the country of citizenship, and 'CTB' country of birth. Throughout this report, country of citizenship is used.

population' and defines this as persons who either 'have lived in their place of usual residence¹⁵⁶ for a continuous period of at least 12 months before the reference time; or those who arrived in their place of usual residence during the 12 months before the reference time with the intention of staying there for at least one year'¹⁵⁷.

Eurostat migration and citizenship data provide data on *inflows and outflows* by citizenship or country of birth or previous/next country of residence¹⁵⁸. Due to legal deadlines and including the time needed for Eurostat to validate and process the data migration statistics are published more than one year after the reference period/date¹⁵⁹. Data on inflows and outflows equally refers to persons moving their place of usual residence to another country with the intention of staying at least for one year.

According to Regulation (EC) No 862/2007, there is no obligation for Member States to breakdown the numbers of EU foreigners by citizenship. Still in 2018, only Cyprus and Malta, and Spain for some countries of citizenship, did not report breakdowns by EU citizenship. However, when selecting a specific age group (in the case of this report, 20 to 64 years), the number of Member States detailing the nationality of mobile EU citizens decreases to 21¹⁶⁰.

Further reported variables are age group and sex. No information is available concerning the duration of residence, employment status, or education level.

Migration statistics are mostly based on administrative registers which includes coverage errors, mainly due to the non-propensity to register or deregister. The practical necessity to be registered for further administrative services (e.g. to open a bank account, to rent a flat) make data on arrivals more complete than data on departures¹⁶¹. Data providers use the following strategies to increase the reliability of these statistics: exchange of data with other National Statistical Institutes; estimation techniques; usage of additional administrative sources.

The fact that under-coverage is less likely for arriving movers, but that many movers may not deregister, explains why data on stocks from population statistics are usually higher than those estimated by the EU-LFS.

Although both citizenship and previous/next country of residence are collected for inflow/outflow data, the two cannot be combined. This implies for instance that the estimates on inflows to Member States either have to be based on previous country residence being another Member State (and thus include third-country nationals) or have to be based on citizenship of another Member States (and thus include EU citizens immigrating from third countries).

¹⁵⁶ Usual residence means the place where a person normally spends the daily period of rest, regardless of temporary absences for purposes of recreation, holidays, visits to friends and relatives, business, medical treatment or religious pilgrimage; cf. Eurostat (2019).

¹⁵⁷ Ibid.

¹⁵⁸ Eurostat data sets [Migr_imm], [Migr_emi] and respective subsets.

¹⁵⁹ As of November 2022, the latest data on 'stock' refers to the situation on 1st January 2021 and the latest data on 'in- and outflows' refers to flows that occurred during 2020.

¹⁶⁰ Eurostat (2022f).

¹⁶¹ Fajth, et al. (2018), 'Monitoring Migration within the EU with Existing Data', *REMINDER Project*, Maastricht, p. 13.

Annex C: Data annex

C.1: The mobile working age population in 2016-2021

Table 16: Composition of inflows of movers to EU and EFTA countries (in 1 000s and %), 2020-2021

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021		2020	2021	2020	2021	
EU-27	722	762	29	27	-2	589	656	24	23	-1	1 156	1 381	47	49	2
AT	51	51	64	56	-8	7	7	9	7	-2	22	33	28	37	9
BE	45	49	50	48	-2	12	12	13	11	-2	33	42	37	41	4
BG	1	5	4	16	12	18	15	64	53	-11	9	9	32	31	-1
CY	7	6	35	33	-2	2	3	10	16	6	11	10	55	51	-4
CZ	15	12	29	21	-8	3	3	6	4	-2	34	43	65	75	10
DE	243	236	43	36	-7	108	111	19	17	-2	208	313	37	47	10
DK	18	24	41	49	8	13	11	30	22	-8	13	15	30	29	-1
EE	3	4	21	22	1	5	6	36	35	-1	6	7	43	43	0
EL	5	2	9	5	-4	15	20	27	53	26	35	16	64	42	-22
ES	63	80	18	21	3	34	46	10	12	2	249	251	72	67	-5
FI	5	7	20	25	5	7	6	28	20	-8	13	15	52	55	3
FR	34	40	18	17	-1	56	69	29	30	1	103	122	53	53	0
HR	3	4	10	12	2	6	7	21	25	4	20	19	69	63	-6
HU	13	10	20	14	-6	29	28	45	41	-4	22	31	34	45	11

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021		2020	2021	2020	2021	
IE	15	12	25	20	-5	24	25	41	43	2	20	22	34	37	3
IT	34	35	19	15	-4	37	50	20	21	1	110	152	61	64	3
LT	1	1	3	2	-1	18	18	45	48	3	21	19	53	50	-3
LU	12	13	67	64	-3	1	1	6	5	-1	5	6	28	31	3
LV	0	1	0	6	6	3	5	50	47	-3	3	5	50	48	-2
MT	5	6	38	38	0	1	2	8	13	5	7	7	54	48	-6
NL	63	72	46	46	0	29	25	21	16	-5	46	61	33	39	6
PL	57	62	36	33	-3	34	29	22	15	-7	67	96	42	51	9
PT	6	2	12	6	-6	18	29	36	75	39	26	7	52	19	-33
RO	5	8	4	5	1	92	119	78	76	-2	21	30	18	19	1
SE	16	19	27	29	2	10	9	17	14	-3	33	37	56	57	1
SI	2	2	8	12	4	6	3	24	15	-9	17	13	68	74	6
SK	2	1	50	52	2	1	1	25	32	7	1	0	25	16	-9
EFTA	82	97	57	60	3	22	20	15	12	-3	39	45	27	28	1
CH	64	69	59	61	2	17	14	16	13	-3	27	113	25	26	1
IS	4	5	67	65	-2	1	1	17	17	0	1	7	17	18	1
NO	13	23	48	56	8	4	4	15	10	-5	10	41	37	34	-3

Note: Data from 2019 used for Cyprus and Malta. EFTA movers excluded due to low numbers.

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

Table 17: Composition of outflows of movers from EU and EFTA countries (in 1 000s and %), 2020-2021

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021		2020	2021	2020	2021	
EU-27	413	443	27	27	0	662	684	44	40	-4	441	535	29	32	3
AT	27	30	55	57	2	9	9	18	17	-1	13	13	27	25	-2
BE	26	26	44	44	0	18	18	31	31	0	15	15	25	25	0
BG	0	0	0	0	0	3	19	60	91	31	2	2	40	8	-32
CY															
CZ	8	2	26	14	-12	3	2	10	15	5	20	12	65	71	6
DE	160	160	40	40	0	139	139	35	35	0	98	98	25	25	0
DK	19	15	42	42	0	9	9	20	24	4	17	12	38	34	-4
EE	4	4	36	34	-2	5	5	45	49	4	2	2	18	17	-1
EL															
ES	52	76	28	26	-2	47	55	25	19	-6	88	159	47	55	8
FI	3	2	23	21	-2	7	6	54	60	6	3	2	23	19	-4
FR															
HR	1	1	4	2	-2	15	19	54	58	4	12	13	43	40	-3
HU	8	9	13	14	1	18	20	30	33	3	34	33	57	53	-4
IE	11	11	26	25	-1	17	17	40	40	0	15	15	35	36	1
IT	13	18	11	15	4	91	71	76	60	-16	16	30	13	25	12
LT	0	0	0	2	2	12	17	63	75	12	7	5	37	24	-13

	EU movers					Nationals					Third-country nationals				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021		2020	2021	2020	2021	
LU	8	8	67	64	-3	2	2	17	18	1	2	2	17	18	1
LV	0	0	0	3	3	6	7	67	64	-3	3	3	33	33	0
MT	2	4	29	35	6	1	1	14	13	-1	4	6	57	52	-5
NL	34	36	41	41	0	26	30	31	34	3	23	21	28	24	-4
PL	20	20	15	15	0	85	85	64	64	0	28	28	21	21	0
PT															
RO	5	7	3	4	1	129	130	84	72	-12	20	43	13	24	11
SE	11	11	31	32	1	15	15	42	41	-1	10	10	28	27	-1
SI	2	2	14	13	-1	4	4	29	24	-5	8	11	57	63	6
SK	0	0	0	0	0	2	3	100	100	0	0	0	0	0	0
EFTA	57	62	53	54	1	24	25	22	22	0	26	28	24	24	0
CH	45	45	53	54	1	19	19	22	22	0	21	21	25	25	0
IS	4	3	80	68	-12	1	1	20	22	2	0	0	0	10	10
NO	8	14	50	53	3	4	6	25	21	-4	4	7	25	26	1

Note: Data not available for Cyprus, France, Greece, and Portugal. Data from 2019 used for Estonia, and data from 2020 used for Belgium, Germany, Ireland, Poland, Sweden, and Switzerland as 2021 values were missing at the time of writing.

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

**Table 18: Inflows of EU movers to EU and EFTA countries by gender
(in 1 000s and %), 2020-2021**

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021	
EU-27	307	321	43	42	-1	399	441	57	58	1
AT	23	22	45	44	-1	29	29	55	56	1
BE	20	22	45	45	0	25	27	55	55	0
BG	0	1	29	32	3	1	3	71	68	-3
CY	2	3	41	47	6	3	3	59	53	-6
CZ	6	5	41	40	-1	9	7	59	60	1
DE	96	92	39	39	0	149	144	61	61	0
DK	8	9	43	38	-5	11	15	57	62	5
EE	1	1	36	37	1	2	2	64	63	-1
EL	6	1	57	51	-6	4	1	43	49	6
ES	30	38	47	48	1	34	41	53	52	-1
FI	2	2	37	34	-3	3	5	63	66	3
FR	18	20	50	50	0	18	20	50	50	0
HR	1	2	41	46	5	1	2	59	54	-5
HU	6	4	47	46	-1	7	5	53	54	1
IE	8	4	53	35	-18	7	8	47	65	18
IT	21	20	61	58	-3	13	15	39	42	3
LT	0	0	33	33	0	1	1	67	67	0
LU	5	5	43	42	-1	7	7	57	58	1
LV	0	0	26	36	10	0	0	74	64	-10
MT	3	2	38	38	0	5	4	62	62	0
NL	28	32	45	45	0	35	40	55	55	0
PL	5	19	25	31	6	16	43	75	69	-6
PT	3	2	48	61	13	3	1	52	39	-13
RO	2	3	37	38	1	3	5	63	62	-1
SE	8	8	46	44	-2	9	11	54	56	2
SI	1	1	40	39	-1	1	1	60	61	1
SK	1	0	40	37	-3	1	1	60	63	3
EFTA	35	39	42	40	-2	48	58	58	60	2
CH	28	29	43	42	-1	37	40	57	58	1
IS	2	2	39	35	-4	3	3	61	65	4
NO	6	9	40	37	-3	8	15	60	63	3

Note: Values from 2019 used for Croatia, Cyprus, Greece, Malta, and Poland.

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

Table 19: Inflows of EU movers to EU and EFTA countries by age group (in 1 000s and %), 2020-2021

	20 to 34					35 to 49					50 to 64				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021		2020	2021	2020	2021	
EU-27	386	414	54	54	0	229	236	32	31	-1	106	112	15	15	0
AT	29	29	57	57	0	15	15	29	29	0	7	7	14	14	0
BE	26	29	59	59	0	13	15	30	30	0	5	6	11	12	1
BG	0	2	31	38	7	0	1	40	31	-9	0	1	29	30	1
CY	4	4	57	57	0	2	2	31	31	0	1	1	13	13	0
CZ	8	6	55	55	0	5	4	32	32	0	2	2	13	14	1
DE	130	130	53	55	2	80	75	33	32	-1	34	31	14	13	-1
DK	12	16	69	66	-3	4	6	24	26	2	1	2	7	8	1
EE	2	2	60	64	4	1	1	26	24	-2	0	0	14	12	-2
EL	2	1	44	45	1	2	1	28	31	3	1	0	27	24	-3
ES	30	37	48	47	-1	19	24	31	30	-1	13	18	21	23	2
FI	3	4	55	54	-1	2	2	34	35	1	1	1	11	11	0
FR	18	22	53	55	2	11	11	31	29	-2	5	7	16	17	1
HR	1	1	26	41	15	1	1	34	29	-5	1	1	40	30	-10
HU	5	4	40	42	2	4	3	29	26	-3	4	3	31	32	1
IE	8	6	52	52	0	6	4	38	36	-2	2	1	10	12	2

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	20 to 34					35 to 49					50 to 64				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2020	2021		2020	2021	2020	2021		2020	2021	2020	2021	
IT	14	3	40	40	0	12	1	34	35	1	9	0	25	25	0
LT	0	14	55	49	-6	0	12	32	36	4	0	9	13	16	3
LU	7	0	56	58	2	3	0	30	30	0	2	0	13	12	-1
LV	0	7	48	56	8	0	4	36	28	-8	0	2	16	16	0
MT	3	0	59	59	0	1	0	30	29	-1	0	0	10	12	2
NL	43	3	68	70	2	16	2	25	23	-2	4	1	7	7	0
PL	24	51	44	41	-3	23	16	42	44	2	8	5	14	15	1
PT	3	26	51	50	-1	2	27	27	30	3	1	9	22	20	-2
RO	2	1	47	45	-2	2	1	33	32	-1	1	1	19	23	4
SE	10	3	63	61	-2	4	2	28	29	1	1	2	9	10	1
SI	1	12	39	42	3	1	5	38	37	-1	1	2	24	21	-3
SK	1	1	46	44	-2	1	1	37	36	-1	0	0	18	20	2
EFTA	48	57	58	58	0	26	30	31	31	0	8	10	10	10	0
CH	37	40	58	59	1	20	21	32	31	-1	7	7	11	11	0
IS	3	3	67	67	0	1	1	26	25	-1	0	0	7	8	1
NO	8	13	59	56	-3	4	8	32	34	2	1	2	9	10	1

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

**Table 20: EU movers and third-country nationals in the EU by gender
(in 1 000s and %), 2016-2022**

Nationality	Gender	2016	2017	2018	2019	2020	2021	2022
EU movers	Male	4 832 (51%)	4 763 (51%)	4 928 (51%)	5 066 (51%)	5 118 (51%)	5 128 (51%)	5 066 (51%)
	Female	4 698 (49%)	4 646 (49%)	4 772 (49%)	4 864 (49%)	4 906 (49%)	4 897 (49%)	4 874 (49%)
Third-country nationals	Male	6 647 (51%)	7 115 (51%)	7 439 (51%)	7 793 (51%)	8 349 (52%)	8 702 (52%)	8 760 (52%)
	Female	6 490 (49%)	6 843 (49%)	7 126 (49%)	7 393 (49%)	7 855 (48%)	8 119 (48%)	8 230 (48%)

Note: EU-28 values used in 2016, as well as for Germany (2017-2019), Cyprus, Greece, France, Croatia, Malta, and Poland (2017-2020).

Source: Eurostat [migr_pop1ctz], Milieu calculations

Table 21: Population on 1 January of EU movers in EU and EFTA countries (1 000s), 2017-2022

MS	2017	2018	2019	2020	2021	2022	2022/2021 change (%)
EU-27	12 424	12 878	12 949	9 942	10 023	9 933	-1
AT	493	520	546	563	588	610	4
BE	609	617	630	630	642	657	2
BG	9	9	9	7	8	12	50
CY	83	87	93	85	75	73	-3
CZ	176	184	193	195	200	140	-30
DE	3 047	3 200	3 321	3 290	3 330	3 360	1
DK	163	171	180	168	171	186	9
EE	13	16	17	17	16	17	6
EL	154	158	157	128	119	87	-27
ES	1 393	1 385	1 406	1 280	1 285	1 280	0
FI	75	75	76	73	74	78	5
FR	964	960	969	911	898	894	0
HR	9	10	10	11	12	7	-42
HU	61	61	58	61	58	59	2
IE	331	336	346	275	279	283	1
IT	1 187	1 201	1 147	1 125	1 073	1 037	-3
LT	5	5	5	6	5	7	40
LU	166	170	172	169	170	172	1
LV	4	5	5	5	5	5	0
MT	23	30	36	27	35	37	6
NL	385	414	447	449	474	514	8
PL	22	25	26	27	61	25	-59
PT	84	97	113	111	117	125	7
RO	45	47	49	49	49	13	-73
SE	221	227	231	218	213	215	1
SI	15	16	17	17	17	16	-6
SK	43	45	46	46	47	31	-34
EFTA	1 289	1 307	1 327	1 312	1 335	1 356	2
CH	997	1 007	1 018	1 004	1 023	1 041	2
IS	21	27	32	34	35	37	6
NO	270	273	277	274	277	278	0

Note: Numbers on stocks of EU-27 movers are estimated for: Cyprus, France, Croatia, Greece, Malta, Poland in 2020. Estimation based on equivalent shares of EU-27 movers from EU-28 movers in EU-LFS data.

Source: Eurostat [migr_pop1ctz], Milieu calculations

Table 22: Stocks of EU movers and third-country nationals in EU and EFTA countries (in 1 000s and % of total working-age population), 2021-2022

	EU movers					Third-country nationals				
	1 000s		% of w-a pop.		Diff. (Pps)	1 000s		% of w-a pop.		Diff. (Pps)
	2021	2022	2021	2022		2021	2022	2021	2022	
EU-27	10 025	9 933	4	4	0	16 822	16 929	6	6	0
AT	588	610	11	11	0	506	523	9	10	1
BE	642	657	10	10	0	379	390	6	6	0
BG	8	12	0	0	0	72	74	2	2	0
CY	75	73	14	13	-1	53	59	10	10	0
CZ	200	140	3	2	-1	302	292	5	5	0
DE	3 330	3 360	7	7	0	4 398	4 550	9	9	0
DK	171	186	5	5	0	227	229	7	7	0
EE	16	17	2	2	0	115	115	15	15	0
EL	119	87	2	1	-1	488	480	8	8	0
ES	1 285	1 280	4	4	0	2 579	2 595	9	9	0
FI	74	78	2	2	0	135	145	4	5	1
FR	898	894	2	2	0	2 415	2 493	6	7	1
HR	12	7	1	0	-1	64	20	3	1	-2
HU	58	59	1	1	0	98	103	2	2	0
IE	279	283	9	10	1	232	243	8	8	0
IT	1 073	1 037	3	3	0	2 715	2 614	8	8	0
LT	7	7	0	0		62	62	4	4	0
LU	170	172	42	41	-1	41	43	10	10	0
LV	5	5	0	0	0	139	133	13	12	-1
MT	35	37	11	11	0	50	51	15	15	0
NL	474	514	5	5	0	426	439	4	4	0
PL	61	25	0	0	0	307	350	1	2	1
PT	117	125	2	2	0	388	409	6	7	1
RO	49	13	0	0	0	66	22	1	0	-1
SE	213	215	4	4	0	434	422	7	7	0
SI	17	16	1	1	0	116	118	9	9	0
SK	47	31	1	1	0	16	18	0	1	1
EFTA	1 336	1 356	15	15	0	739	735	8	8	0
CH	1 024	1 041	19	20	1	561	567	11	11	0
IS	35	37	16	16	0	8	9	4	4	0
NO	277	278	9	9	0	170	159	5	5	0

Note: 2021 value used for LT, no comparison possible between 2021 and 2022

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

Table 23: Stocks of EU movers by gender in EU and EFTA countries, 2021-2022

	Females					Males				
	1 000s		%		Diff. (Pps)	1 000s		%		Diff. (Pps)
	2020	2021	2021	2022		2021	2022	2021	2022	
EU-27	4 897	4 872	49	49	0	5 128	5 062	51	51	0
AT	295	305	50	50	0	294	305	50	50	0
BE	313	320	49	49	0	330	337	51	51	0
BG	3	4	35	34	-1	5	8	65	66	1
CY	41	40	54	54	0	34	33	46	46	0
CZ	79	61	39	44	5	121	79	61	56	-5
DE	1 520	1 536	46	46	0	1 810	1 824	54	54	0
DK	79	85	46	45	-1	92	102	54	55	1
EE	6	6	36	35	-1	11	11	64	65	1
EL	77	58	65	67	2	42	29	35	33	-2
ES	637	638	50	50	0	648	642	50	50	0
FI	31	32	42	41	-1	43	46	58	59	1
FR	440	440	49	49	0	458	454	51	51	0
HR	6	4	51	54	3	6	3	49	46	-3
HU	24	26	42	44	2	33	33	58	56	-2
IE	144	144	51	51	0	136	139	49	49	0
IT	660	632	61	61	0	413	405	39	39	0
LT	2	2	32	32	0	4	4	68	68	0
LU	80	80	47	47	0	90	91	53	53	0
LV	2	2	34	34	0	3	3	66	66	0
MT	14	15	40	40	0	21	22	60	60	0
NL	239	258	50	50	0	235	256	50	50	0
PL	16	7	26	27	1	45	18	74	73	-1
PT	57	61	49	49	0	60	64	51	51	0
RO	14	5	28	37	9	35	8	72	63	-9
SE	96	96	45	45	0	117	119	55	55	0
SI	6	6	38	39	1	10	10	62	61	-1
SK	16	11	33	36	3	31	20	67	64	-3
EFTA	577	585	43	43	0	759	771	57	57	0
CH	452	459	44	44	0	572	582	56	56	0
IS	13	14	39	39	0	21	23	61	61	0
NO	111	111	40	40	0	166	167	60	60	0

Note: 2021 values used for Lithuania as 2022 values were not available at the time of writing. Because of this the comparison between 2021 and 2022 is not possible for Lithuania. 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 24: Stocks of EU movers by age group in EU and EFTA countries (in 1 000s), 2021-2022

	0 to 19			20 to 34			35 to 49			50 to 64			65 and older		
	2021	2022	Diff. (%)	2021	2022	Diff. (%)	2021	2022	Diff. (%)	2021	2022	Diff. (%)	2021	2022	Diff. (%)
EU-27	2 287	2 318	1	3 388	3 302	-3	4 042	4 008	-1	2 595	2 630	1	1 384	1 409	2
AT	153	160	5	221	224	1	232	242	4	135	144	7	52	56	8
BE	177	181	2	213	218	2	240	244	2	189	195	3	118	121	3
BG	1	1	0	1	3	200	3	4	33	3	4	33	3	3	0
CY	15	15	0	31	29	-6	30	31	3	14	14	0	6	6	0
CZ	23	21	-9	58	43	-26	97	70	-28	45	28	-38	21	12	-43
DE	698	716	3	1 212	1 203	-1	1 291	1 298	1	827	859	4	434	447	3
DK	35	39	11	84	90	7	61	68	11	26	28	8	10	11	10
EE	2	2	0	8	8	0	5	6	20	3	4	33	2	2	0
EL	29	14	-52	17	19	12	51	37	-27	51	31	-39	20	14	-30
ES	268	269	0	379	365	-4	569	563	-1	337	351	4	180	192	7
FI	18	19	6	24	24	0	32	34	6	18	19	6	6	6	0
FR	283	290	2	234	233	0	326	324	-1	337	338	0	300	302	1
HR	2	1	-50	3	2	-33	5	3	-40	5	2	-60	7	3	-57
HU	7	7	0	25	25	0	18	18	0	15	17	13	11	12	9
IE	62	62	0	90	85	-6	151	156	3	38	42	11	9	10	11
IT	274	285	4	302	259	-14	474	471	-1	297	307	3	59	67	14

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	0 to 19			20 to 34			35 to 49			50 to 64			65 and older		
	2021	2022	Diff. (%)	2021	2022	Diff. (%)	2021	2022	Diff. (%)	2021	2022	Diff. (%)	2021	2022	Diff. (%)
LT	1	1	0	3	3	0	3	3	0	1	1	0	1	1	0
LU	49	48	-2	49	49	0	70	70	0	51	53	4	25	26	4
LV	1	1	0	1	1	0	2	2	0	2	2	0	1	1	0
MT	5	5	0	18	19	6	12	13	8	5	5	0	3	3	0
NL	97	107	10	225	245	9	173	186	8	77	83	8	28	29	4
PL	17	3	-82	28	9	-68	23	11	-52	10	6	-40	5	5	0
PT	16	17	6	47	49	4	41	45	10	29	32	10	26	28	8
RO	4	4	0	17	4	-76	18	5	-72	14	4	-71	8	4	-50
SE	47	47	0	82	82	0	84	86	2	46	47	2	39	39	0
SI	2	2	0	4	4	0	7	7	0	5	6	20	3	3	0
SK	4	2	-50	12	9	-25	21	14	-33	14	8	-43	9	5	-44
EFTA	330	334	1	424	426	0	573	581	1	338	349	3	150	152	1
CH	256	260	2	316	320	1	431	437	1	276	285	3	135	136	1
IS	6	6	0	18	19	6	12	13	8	5	5	0	1	1	0
NO	69	68	-1	90	88	-2	130	131	1	57	59	4	15	15	0

Note: 2021 values used for Lithuania as 2020 values were not available at the time of writing.

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

Table 25: Returning nationals by country of return (1 000s), 2017-2021

MS	2017	2018	2019	2020	2021	Change 2017-2021 (%)
EU-27	655	678	721	589	656	0
AT	7	7	7	7	7	-5
BE	12	12	12	12	12	-6
BG	9	11	16	18	15	+69
CY	4	4	4	2	3	-13
CZ	4	4	4	3	3	-38
DE	88	108	115	108	111	+26
DK	14	13	13	13	11	-21
EE	7	7	6	5	6	-20
EL	23	23	24	15	20	-11
ES	48	52	53	34	46	-4
FI	5	6	6	7	6	+4
FR	87	89	89	56	69	-20
HR	6	6	7	6	7	+24
HU	29	30	30	29	28	-3
IE	19	23	16	24	25	+29
IT	28	31	46	37	50	+77
LT	9	14	18	18	18	+109
LU	1	1	1	1	1	+30
LV	4	3	3	3	5	+37
MT	1	1	1	1	2	+90
NL	28	29	30	29	25	-14
PL	70	54	50	34	29	-59
PT	16	16	20	18	29	+85
RO	124	118	136	92	119	-4
SE	12	11	10	10	9	-22
SI	2	3	2	6	3	+20
SK	1	1	1	1	1	-23
EFTA	21	21	21	22	20	-6
CH	16	16	16	17	14	-11
IS	2	1	1	1	1	-22
NO	3	4	3	4	4	+24

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

Table 26: Total number of PDs A1 issued by sending Member State (1 000s), 2018-2022

MS	2018	2019	2020	2021	2022	Change 2021-22 (%)
EU-27	2 885	4 512	3 676	3 533	4 460	+26
AT	111	198	105	107	140	+31
BE	137	151	124	128	143	+12
BG	26	30	26	26	27	+1
CY	4	4	4	3	3	
CZ	64	81	61	68	70	+2
DE	476	1 799	1 397	997	1 608	+61
DK	47	53	44	38	47	+25
EE	20	23	22	21	17	-19
EL	9	9	9	9	9	
ES	249	252	176	212	271	+28
FI	10	10	9	9	12	+29
FR	120	126	62	102	166	+63
HR	66	67	71	84	84	-0.3
HU	64	71	44	69	69	
IE	7	7	6	2	5	+217
IT	170	216	216	275	315	+15
LT	78	95	94	111	109	-1
LU	80	92	68	66	71	+8
LV	20	23	24	24	24	-1
MT	3	4	7	7	11	+51
NL	101	105	87	82	88	+7
PL	606	648	618	677	723	+7
PT	74	77	61	67	88	+31
RO	71	82	67	68	66	-2
SE	11	14	10	8	9	+21
SI	127	146	157	168	172	+2
SK	135	128	108	106	122	+15
EFTA	34	79	50	85	145	+70
CH	29	72	45	78	137	+76
IS	0.2	0.3	0.2	0.2	0.3	+37
NO	4	5	3	3	6	+73

Note: 2021 figures used for Cyprus, Greece, and Hungary.

Source: De Wispelaere, et al. (2023, forthcoming).

Table 27: Inflows, outflows, and net mobility of Member States' own citizens (1 000s), 2017-2021

Country	Inflows					Outflows					Net flows				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
EU/EFTA	677	699	742	611	676	925	857	847	686	709	-378	-290	-243	-167	-149
EU-27	655	678	721	589	656	895	827	818	662	684	-368	-281	-235	-165	-147
AT	7	7	7	7	7	11	10	11	9	9	-4	-4	-4	-2	-3
BE	12	12	12	12	12	23	24	23	18	18	-10	-12	-11	-6	-6
BG	9	11	16	18	15	22	24	30	3	19	-13	-14	-14	15	-4
CY	4	4	4	2	3										
CZ	4	4	4	3	3	5	5	5	3	2	-1	-1	-1	0	0
DE	88	108	115	108	111	163	161	165	139	139	-75	-52	-50	-31	-31
DK	14	13	13	13	11	11	10	10	9	9	3	3	3	5	2
EE	7	7	6	5	6	7	5	5	5	5	0	1	1	-1	-1
EL	23	23	24	15	20										
ES	48	52	53	34	46	62	57	56	47	55	-14	-5	-3	-14	-9
FI	5	6	6	7	6	8	9	8	7	6	-3	-3	-2	0	-1
FR	87	89	89	56	69										
HR	6	6	7	6	7	35	27	24	15	19	-29	-21	-17	-9	-12
HU	29	30	30	29	28	26	22	21	18	20	3	8	9	10	8
IE	19	23	16	24	25	24	20	21	17	17	-4	4	-5	7	7
IT	28	31	46	37	50	86	89	94	91	71	-58	-57	-48	-54	-20
LT	9	14	18	18	18	37	23	19	12	17	-29	-8	-1	7	1

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Country	Inflows					Outflows					Net flows				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
LU	1	1	1	1	1	2	2	2	2	2	-1	-1	-1	-1	-1
LV	4	3	3	3	5	12	9	8	6	7	-8	-6	-4	-3	-2
MT	1	1	1	1	2	1	1	1	1	1	0	0	0	0	1
NL	28	29	30	29	25	37	35	33	26	30	-9	-6	-3	3	-5
PL	70	54	50	34	29	127	106	102	85	85	-58	-52	-52	-51	-51
PT	16	16	20	18	29										
RO	124	118	136	92	119	173	163	159	129	130	-49	-45	-23	-37	-11
SE	12	11	10	10	9	15	16	15	15	15	-3	-5	-5	-5	-5
SI	2	3	2	6	3	7	5	5	4	4	-5	-2	-2	2	-1
SK	1	1	1	1	1	3	2	3	2	3	-2	-1	-2	-1	-2
EFTA	21	21	21	22	20	30	31	30	24	25	-9	-9	-8	-2	-2
CH	16	16	16	17	14	23	23	23	19	19	-7	-7	-6	-1	-1
IS	2	1	1	1	1	2	2	1	1	1	0	0	0	0	0
NO	3	4	3	4	4	6	6	5	4	6	-2	-2	-2	-1	-1

Note: Outflow data not available for Cyprus, France, Greece, and Portugal. For 2016-2019, 'EU movers' and 'Third-country nationals (TCN)' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Estimated values for outflows in Estonia in 2020 and for Belgium, Germany, Estonia, Ireland, Poland, Sweden, and Switzerland in 2021. EFTA movers have been omitted due to small size and/or data unavailability.

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

Table 28: Inflows, outflows, and net mobility of citizens of other Member States (1 000s), 2017-2021

Country	Inflows					Outflows					Net flows				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
EU/EFTA	954	946	953	804	859	531	519	586	470	505	346	348	291	282	296
EU-27	862	853	860	722	762	464	451	523	413	443	321	324	262	257	266
AT	51	52	54	51	51	26	26	28	27	30	26	26	26	24	21
BE	47	50	54	45	49	31	29	31	26	26	16	21	23	19	19
BG	1	1	1	1	5	1	0	0	0	0	0	1	1	1	4
CY	7	7	6	7	6										
CZ	14	15	28	15	12	3	2	29	8	2	11	12	-1	7	10
DE	318	300	279	243	236	164	168	199	160	160	154	132	80	84	84
DK	22	21	19	18	24	20	21	25	19	15	1	0	-5	-1	9
EE	4	4	3	3	4	2	2	4	4	4	2	2	0	-1	-1
EL	13	12	10	5	2										
ES	104	108	113	63	80	105	81	74	52	76	-1	28	39	10	3
FI	5	6	5	5	7	3	4	3	3	2	2	2	2	2	5
FR	52	53	50	34	40										
HR	2	2	2	3	4	1	1	1	1	1	1	1	1	2	3
HU	9	9	9	13	10	5	13	13	8	9	4	-4	-4	4	1
IE	21	23	21	15	12	14	12	13	11	11	6	11	9	4	4
IT	49	45	46	34	35	15	16	22	13	18	34	29	24	21	17
LT	1	1	1	1	1	0	0	0	0	0	1	1	1	1	0

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Country	Inflows					Outflows					Net flows				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
LU	13	13	14	12	13	7	7	8	8	8	6	6	5	4	5
LV	1	1	1	0	1	0	0	0	0	0	0	0	0	0	0
MT	10	10	8	5	6	2	3	2	2	4	8	7	6	3	2
NL	60	66	75	63	72	30	33	35	34	36	30	33	40	29	36
PL	17	14	19	57	62	17	13	15	20	20	0	1	4	37	37
PT	6	6	10	6	2										
RO	8	7	8	5	8	5	5	8	5	7	3	3	0	0	1
SE	25	23	21	16	19	10	11	12	11	11	15	13	9	4	4
SI	3	3	3	2	2	2	2	2	2	2	1	1	1	0	0
SK	2	2	2	2	1	0	0	0	0	0	2	2	2	2	1
EFTA	92	93	93	82	97	68	69	64	57	62	25	24	29	25	30
CH	68	68	69	64	69	52	56	54	45	45	15	12	15	19	19
IS	8	8	6	4	5	1	2	2	4	3	7	6	4	1	2
NO	17	18	18	13	23	14	12	7	8	14	3	6	10	6	9

Note: Outflow data not available for Cyprus, France, Greece, and Portugal. For 2016-2019, 'EU movers' and 'Third-country nationals (TCN)' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Estimated values for outflows in Estonia in 2020 and for Belgium, Germany, Estonia, Ireland, Poland, Sweden, and Switzerland in 2021. EFTA movers have been omitted due to small size and/or data unavailability.

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

Table 29: Inflows, outflows, and net mobility of third-country nationals (1 000s), 2017-2021

Country	Inflows					Outflows					Net flows				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
EU/EFTA	1 259	1 426	1 606	1 195	1 426	429	402	462	467	563	661	838	933	553	556
EU	1 213	1 381	1 560	1 156	1 381	403	376	436	441	535	641	819	913	540	542
AT	25	22	23	22	33	15	16	15	13	13	10	6	8	9	20
BE	34	40	44	33	42	15	15	26	15	15	19	25	18	18	18
BG	8	9	10	9	9	3	1	1	2	2	5	8	8	7	7
CY	7	10	12	11	10										
CZ	25	37	59	34	43	15	16	32	20	12	10	22	26	14	31
DE	273	270	283	208	313	121	106	104	98	98	152	164	179	111	111
DK	18	16	15	13	15	16	19	21	17	12	1	-3	-6	-4	3
EE	4	5	5	6	7	2	1	2	2	2	2	3	4	4	4
EL	38	43	50	35	16										
ES	232	310	385	249	251	112	96	99	88	159	120	214	286	160	92
FI	12	11	13	13	15	2	2	2	3	2	10	9	11	10	14
FR	117	122	124	103	122										
HR	5	14	24	20	19	1	2	6	12	13	4	12	18	8	6
HU	21	33	39	22	31	6	7	10	34	33	15	26	28	-12	-2
IE	17	25	24	20	22	9	7	11	15	15	8	18	13	4	4
IT	175	166	148	110	152	15	14	24	16	30	160	152	124	94	122
LT	9	11	18	21	19	2	3	4	7	5	7	8	14	13	13

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Country	Inflows					Outflows					Net flows				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
LU	5	5	6	5	6	2	2	2	2	2	3	4	4	3	4
LV	4	5	5	3	5	2	3	4	3	3	1	2	1	0	2
MT	7	12	15	7	7	3	4	4	4	6	5	9	11	3	1
NL	48	50	58	46	61	16	17	17	23	21	31	33	41	23	40
PL	47	65	77	67	96	20	21	21	28	28	27	44	56	39	39
PT	6	11	26	26	7										
RO	13	17	26	21	30	12	11	14	20	43	1	6	12	1	-13
SE	53	53	50	33	37	9	9	9	10	10	45	44	42	24	24
SI	10	17	21	17	13	4	4	5	8	11	5	13	15	9	2
SK	0	1	0	1	0	0	0	0	0	0	0	1	0	1	0
EFTA	46	45	46	39	45	26	26	26	26	28	20	19	20	13	14
CH	28	29	29	27	30	21	23	22	21	21	7	6	7	6	6
IS	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
NO	17	14	15	10	14	5	3	4	4	7	12	11	11	6	7

Note: Outflow data not available for Cyprus, France, Greece, and Portugal. For 2016-2019, 'EU movers' and 'Third-country nationals (TCN)' refer to citizens from (non-)EU-28 countries. From 2020 onwards, the reference group is (non-)EU-27 countries. Estimated values for outflows in Estonia in 2020 and for Belgium, Germany, Estonia, Ireland, Poland, Sweden, and Switzerland in 2021. EFTA movers have been omitted due to small size and/or data unavailability.

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

Table 30: Cross-border workers by country of residence and country of work, 2022

		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	1 352	158	90	(28)	395	(36)	(28)		43			44	228	140						446	388	(42)
	AT	38				29															9	(8)	
	BE	127				13				12				50	48								
	BG	25				13																	
	CZ	64	10			45										(1)				(2)			
	DE	179	(27)											61	46						58	57	
	DK	(4)				(2)																	
	EE	10							8									(1)					(1)
	EL																						
	ES	40				(5)				(6)		(5)	(2)		(5)		(4)				(5)	(3)	
	FI	(4)																					
	FR	235		47		61								113							215	215	
	HR	35	(8)			13													(8)		(2)		(1)
	HU	84	56			19																	
	IT	38				8				9											94		
	LT	8				(4)												(2)			5		5

			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
	LU	6																					
	LV	15																			(5)		
	NL	25		12		11																	
	PL	180			(15)	119									(17)						(18)		(16)
	PT	18						(7)															
	RO	115		12		41		(7)					28										
	SE	25					18														11		11
	SI	20	15										(2)										
	SK	44	22		11							10											
	CH	11	(1)			(5)																	

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 2022, custom extraction by Milieu.

C.2: The labour market integration of mobile workers

Table 31: Activity rate by nationality group and country of residence (%), 2017-2022

MS	2017			2018			2019			2020			2021			2022		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
EU-27	78	81	68	78	81	70	79	82	70	78	80	69	79	81	70	80	83	71
AT	81	83	67	81	82	70	81	82	70	81	83	68	81	83	72	81	85	72
BE	74	77	57	75	77	57	75	77	55	75	78	50	76	80	55	77	80	59
BG	76			76			78			77			77			79		
CY	80	(85)	(71)	82	(84)	(69)	82	(86)	(72)	81	86	74	82	(85)	79	83	90	79
CZ	81	(89)	(82)	82	(88)	(84)	82	(88)	(86)	82	(87)	(85)	82	(87)	(84)	83	(90)	(86)
DE	84	82	61	84	83	63	85	84	65	84	82	65	84	83	64	85	85	66
DK	82	(86)	66	82	85	67	83	(86)	(65)	83	(87)	69	83	(90)	(72)	84	(89)	79
EE	84		(77)	84		79	84		(79)	84		(80)	85		(78)	88		83
EL	73	77	78	73	73	78	74	68	78	73	74	76	73	73	74	76	72	74
ES	79	84	80	79	83	78	79	85	77	78	81	75	79	81	78	80	82	78
FI	81	(92)	(64)	82	(88)	(66)	83		(63)	83	(94)	(68)	83	(95)	70	84	(87)	78
FR	79	77	63	79	80	64	79	79	63	78	79	64	80	81	66	81	80	66
HR	71		(32)	71			71			72			74			75		
HU	76		(70)	77	(83)	(55)	78		(82)	78		(84)	82		(76)	83		(75)
IE	78	85	71	78	86	73	78	86	73	77	82	(72)	79	(85)	75	81	(88)	(80)

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MS	2017			2018			2019			2020			2021			2022		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
IT	70	77	73	70	77	74	70	77	74	69	72	69	69	74	71	70	77	72
LT	82			83			84			84			84		89	84		(90)
LU	72	81	72	72	82	68	73	82	(72)	74	82	75	75	(84)	(81)	75	82	79
LV	83		69	84		73	84		(73)	85		76	82		(70)	83		(72)
MT	74	(91)	(80)	77	(93)	(82)	78	(90)	(82)	79	(96)	83	79	(93)	83	81	(93)	89
NL	82	82	58	83	80	62	83	82	65	84	82	62	85	84	64	86	87	68
PL	75		(77)	75		(81)	75		(88)	76		(85)	78			79		(88)
PT	80		86	81		84	81		85	80		84	81		(84)	82		88
RO	72			73			74			74			71			72		
SE	88	88	75	88	(87)	73	88	(85)	74	88	89	75	88	(92)	77	88	(91)	79
SI	79	(87)	(81)	80		(79)	80		(78)	79	(92)	(81)	80		(79)	81		(82)
SK	77			77			78			78			80			82		
EFTA	85	89	73	85	89	74	85	90	75	85	89	74	85	88	75	85	88	73
CH	87	89	74	87	90	76	87	90	76	87	90	76	87	89	74	87	88	73
IS	89			89			88			87			86	96		87	(100)	
NO	82	90	(73)	82	91	70	82		(69)	82	(88)	(72)	83	(89)	(79)	83	(90)	(74)

Note: 'Nat.' denotes nationals; 'EU' denotes EU movers; 'TCN' denotes third-country nationals. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2022, custom extraction by Milieu.

Table 32: Employment rate by nationality group and country of residence (%), 2017-2022

MS	2017			2018			2019			2020			2021			2022		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
EU-27	72	73	56	73	74	58	74	75	60	73	72	57	74	74	59	75	77	62
AT	77	77	57	78	77	61	78	77	61	77	76	57	77	75	61	79	79	64
BE	70	69	44	71	71	45	72	72	45	71	72	40	72	74	44	73	75	49
BG	71			72			75			73			73			76		
CY	71	(76)	(64)	75	(77)	(66)	76	(81)	(70)	75	78	68	76	(78)	71	78	85	71
CZ	78	(88)	(79)	80	(87)	(83)	80	(86)	(84)	80	(86)	(83)	80	(86)	(82)	81	(88)	(84)
DE	82	78	54	82	79	56	83	80	59	82	78	57	82	78	57	83	81	60
DK	78	(80)	58	79	76	59	80	(81)	(61)	79	(84)	62	80	(87)	(66)	81	(87)	71
EE	79		(74)	80		71	81		(75)	79		(74)	81		(71)	84		76
EL	58	59	57	60	55	57	62	52	58	62	56	54	63	56	57	67	57	61
ES	66	67	60	68	69	60	69	72	60	67	65	55	69	66	59	70	69	62
FI	75	(92)	(55)	77	(88)	(57)	78		(55)	77	(94)	(58)	78	(87)	60	79	(84)	68
FR	72	71	48	73	73	51	73	73	52	73	73	52	74	74	55	75	74	56
HR	64		(32)	65			67			67			68			70		
HU	73		(70)	75	(83)	(55)	75		(82)	75		(84)	79		(76)	80		(75)
IE	73	79	65	74	81	68	75	86	73	74	82	(70)	75	(81)	75	78	(88)	(80)
IT	62	67	63	63	67	64	63	66	64	63	62	60	63	64	61	65	68	63

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MS	2017			2018			2019			2020			2021			2022		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
LT	76			78			78			77			78		89	79		(90)
LU	69	77	62	69	78	59	71	78	(66)	71	76	65	72	(81)	(76)	72	79	73
LV	76		62	79		70	79		(73)	78		(69)	77		(70)	78		(72)
MT	72	(91)	(76)	75	(93)	(79)	76	(90)	(77)	76	(94)	78	77	(92)	78	79	(93)	86
NL	79	78	51	80	78	56	81	80	59	81	80	55	83	80	56	84	85	62
PL	71		(77)	72		(81)	73		(88)	74		(85)	75			77		(88)
PT	73		81	76		79	76		78	75		75	76		(76)	78		78
RO	69			70			71			71			67			69		
SE	84	81	54	85	(84)	53	85	(83)	56	83	83	52	83	(89)	54	84	(89)	61
SI	73	(87)	(74)	76		(74)	77		(74)	76	(92)	(77)	76		(74)	78		(80)
SK	71			72			73			73			75			77		
EFTA	82	83	63	83	84	64	83	86	66	82	84	65	82	83	65	83	84	66
CH	84	84	64	84	85	65	84	86	66	84	85	67	84	83	64	84	83	65
IS	87			87			86			83			82	90		85	(97)	
NO	79	(90)	(64)	80	89	62	80		(69)	80	(83)	(65)	81	(89)	(70)	82	(90)	(74)

Note: 'Nat.' denotes nationals; 'EU' denotes EU movers; 'TCN' denotes third-country nationals. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2022, custom extraction by Milieu.

Table 33: Unemployment rate by nationality group and country of residence (%), 2017-2022

	2017			2018			2019			2020			2021			2022		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
EU-27	8	9	18	7	9	16	6	8	15	6	9	17	6	9	16	5	7	13
AT	4	7	15	4	6	13	3	6	12	4	8	15	5	9	15	3	7	11
BE	6	10	23	5	8	21	5	7	18	5	7	19	5	7	21	5	6	17
BG	6			5			4			5			5			4		
CY	11	(10)	(10)	8	(9)	(5)	7	(6)	(4)	7	9	8	7	(8)	10	6	5	10
CZ	3	(1)	(3)	2	(1)	(1)	2	(2)	(2)	3	(1)	(2)	3	(1)	(3)	2	(2)	(2)
DE	3	5	11	3	5	10	3	4	10	3	5	13	3	5	10	2	4	8
DK	5	(8)	13	4	10	11	4	(6)	(6)	5	(4)	11	4	(3)	(8)	4	(3)	10
EE	5		(4)	4		9	4		(6)	6		(8)	5		(9)	5		9
EL	21	23	28	19	24	26	17	24	27	16	24	29	14	23	23	12	21	18
ES	16	20	25	14	17	23	13	15	22	14	20	27	13	18	24	12	15	20
FI	8		13	6		14	6		(13)	7		(14)	7	(8)	15	6	(4)	12
FR	8	9	23	8	8	21	8	8	18	7	7	18	7	8	16	6	7	15
HR	11			8			6			7			7			7		
HU	4			4			3			4			4			3		
IE	6	6	8	5	6	7	4			5		(3)	5	(5)		4		
IT	11	13	15	10	13	14	9	14	13	9	13	13	9	13	14	7	12	12

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	2017			2018			2019			2020			2021			2022		
	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN	Nat.	EU	TCN
LT	7			6			6			9			7			6		
LU	3	5	13	3	5	13	3	6	(8)	4	7	13	3	(3)	(6)	3	4	8
LV	8		11	7		5	6			8		(10)	7			6		
MT	3		(5)	3		(3)	3		(6)	3	(3)	6	3	(1)	5	2		4
NL	4	4	12	3	3	10	3	3	9	3	3	10	3	5	11	3	2	8
PL	5			4			3			3			3			3		
PT	9		6	7		6	6		7	7		11	6		(10)	6		11
RO	5			4			4			5			5			5		
SE	5	8	28	4	(3)	28	4	(3)	25	6	7	31	6	(3)	30	5	(2)	23
SI	6		(9)	5		7	4		(5)	5		(6)	4		(6)	4		(3)
SK	8			6			6			7			6			6		
EFTA	3	6	14	3	6	14	3	5	12	3	6	12	3	6	13	3	5	10
CH	3	6	13	3	6	14	3	5	12	4	6	12	4	6	14	3	5	11
IS	2			2			3			4			5	6		2	3	
NO	3		(12)	2	3	11	2			3	(6)	(11)	3		(11)	2		

Note: 'Nat.' denotes nationals; 'EU' denotes EU movers; 'TCN' denotes third-country nationals. Unreliable estimates are highlighted in brackets.

Source: EU-LFS 2021, custom extraction by Milieu.

Table 34: Self-employed by nationality group, EU 2017-2022

	2017	2018	2019	2020	2021	2022
Nationals (1 000s and %)						
Employee	147 517 (86 %)	148 927 (86 %)	149 886 (86 %)	147 687 (86 %)	149 574 (87 %)	151 575 (86 %)
Self-employed with employees	7 507 (4 %)	7 414 (4 %)	7 413 (4 %)	6 935 (4 %)	7 334 (4 %)	7 481 (4 %)
Self-employed without employees	16 844 (10 %)	16 750 (10 %)	16 765 (10 %)	16 631 (10 %)	15 884 (9 %)	16 193 (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 %)
Self-employed with employees	121 (2 %)	138 (2 %)	154 (3 %)	28 (1 %)	92 (2 %)	119 (2 %)
Self-employed without employees	411 (7 %)	437 (8 %)	474 (8 %)	189 (4 %)	366 (6 %)	441 (7 %)
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 %)
Self-employed with employees	171 (3 %)	206 (3 %)	221 (3 %)	120 (2 %)	183 (2 %)	213 (2 %)
Self-employed without employees	511 (8 %)	501 (7 %)	581 (7 %)	325 (4 %)	505 (7 %)	533 (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 2022, custom extraction by Milieu.

Table 35: Self-employment by sector and nationality group, EU 2022 (%)

	Nationals	EU movers	Third-country nationals
A: Agriculture	15		
C: Manufacturing	7	3	4
D: Electricity, gas, steam, and air conditioning	0.1		
E: Water supply, sewerage, and sanitation	0.2		
F: Construction	12	31	17
G: Wholesale and retail trade	15	11	29
H: Transportation and storage	3	2	4
I: Accommodation and food services	5	12	19
J: Information and communication	4	5	
K: Financial and insurance activities	2		
L: Real estate	2		
M: Professional	13	11	6
N: Administrative and support services	3	5	5
O: Public administration and defence	0.1		
P: Education	3	3	2
Q: Human health and social work	7	7	2
R: Arts	3	6	2
S: Other service activities	6	4	10
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 2022, custom extraction by Milieu.

Table 36: Proportion of self-employed by nationality group and country of residence, 2021-2022

	Nationals			EU movers			Third-country nationals		
	2021	2022	Diff. (Pps)	2021	2022	Diff. (Pps)	2021	2022	Diff. (Pps)
EU-27	13	14	+1	8	9	+1	9	8	-1
AT	10	10	0						
BE	13	14	+1	8	(8)	0			
BG	9	10	+1						
CY	8	7	-1	(2)	(2)	0	(2)	5	+3
CZ	15	15	0	10	11	+1	25	(17)	-8
DE	7	7	0	(2)	(2)	0	(1)	(1)	0
DK	7	6	-1						
EE	9	8	-1						
EL	29	27	-2				(12)	(5)	-7
ES	15	14	-1	17	19	+2	13	12	-1
FI	11	10	-1						
FR	12	12	0	(5)	5	0	6	6	0
HR	11	11	0						
HU	11	11	0						
IE	9	8	-1						
IT	21	21	0	7	9	+2	12	12	0
LT	10	11	+1						
LU	(3)	4	+1	(1)	4	+3			
LV	9	10	+1						
MT	12	13	+1	(5)	(5)	0	9	(2)	-7
NL	15	16	+1	(11)	12	+1	4	(1)	-3
PL	18	18	0						
PT	12	12	0						
RO	11	11	0						
SE	8	8	0						

	Nationals			EU movers			Third-country nationals		
	2021	2022	Diff. (Pps)	2021	2022	Diff. (Pps)	2021	2022	Diff. (Pps)
SI	12	11	-1				(3)		
SK	12	13	+1						
EFTA	8	8	0	1	2	+1			
CH	13	14	+1	8	9	+1	7	10	+3
IS	11	11	0						
NO	2	2	0						

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 2022, custom extraction by Milieu.

Table 37: Permanent and fixed-term contracts by nationality group, EU 2017-2022

Nationality	Contract type	2017	2018	2019	2020	2021	2022
Nationals	Fixed	20 665 (14 %)	20 417 (14 %)	19 625 (13 %)	17 424 (12 %)	18 287 (12 %)	18 397 (12 %)
	Permanent	126 744 (86 %)	128 434 (86 %)	130 185 (87 %)	130 375 (88 %)	131 153 (88 %)	133 143 (88 %)
EU movers	Fixed	943 (19 %)	974 (19 %)	939 (17 %)	806 (16 %)	858 (16 %)	852 (15 %)
	Permanent	4 011 (81 %)	4 271 (81 %)	4 525 (83 %)	4 295 (84 %)	4 371 (84 %)	4 825 (85 %)
Third-country nationals	Fixed	1 599 (26 %)	1 839 (28 %)	1 943 (28 %)	1 799 (26 %)	1 887 (27 %)	2 055 (25 %)
	Permanent	4 484 (74 %)	4 704 (72 %)	5 020 (72 %)	5 118 (74 %)	5 207 (73 %)	6 056 (75 %)

Note: Percentages in brackets indicate the proportion of workers of each nationality in that employment form.

Source: EU-LFS 2022, custom extraction by Milieu.

Table 38: Number of fixed-term contracts and share of all workers by nationality group in EU and EFTA countries, 2022

	Nationals (%)			EU movers (%)			Third-country nat (%)		
	2021	2022	Diff.*	2021	2022	Diff.*	2021	2022	Diff.*
EU-27	12	12	0	16	15	-1	27	25	-2
AT	6	6	0	9	8	-1	9	10	+1
BE	8	7	-1	13	13	0	26	22	-4
BG	3	4	+1						
CY	8	7	-1	(3)	5	+2	58	52	-6
CZ	6	6	0	11	10	-1	15	17	+2
DE	9	10	+1	15	14	-1	21	22	+1
DK	9	9	0	13	9	-4	16	17	+1
EE	1	2	+1						
EL	9	9	0	(17)	(17)	0	22	22	0
ES	23	20	-3	25	18	-7	42	34	-8
FI	14	14	0	14	18	+4	23	32	+9
FR	13	14	+1	15	18	+3	26	26	0
HR	13	14	+1						
HU	6	5	-1						
IE	8	7	-1				(7)		
IT	16	16	0	21	21	0	22	23	+1
LT	2	2	0						
LU	7	6	-1	7	7	0	17	5	-12
LV	2	2	0						
MT	5	4	-1	(3)			22	23	+1
NL	22	23	+1	33	30	-3	47	48	+1
PL	14	15	+1					43	
PT	16	16	0				48	37	-11
RO	2	2	0						
SE	11	11	0	15	16	+1	39	33	-6
SI	11	10	-1				17	18	+1
SK	4	4	0						
EFTA	8	8	0	10	10	0	15	17	+2
CH	9	9	0	11	11	0	14	15	+1
IS	11	12	+1		7		17	18	+1
NO	7	6	-1				23	19	-4

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.

* Difference in percentage-points

Source: EU-LFS 2022, custom extraction by Milieu.

Table 39: Part-time contracts by nationality group, EU 2017-2022

Nationality	Contract type	2017	2018	2019	2020	2021	2022
Nationals	Full-time	143 593 (83 %)	144 866 (83 %)	145 571 (83 %)	143 623 (83 %)	145 125 (83 %)	147 399 (84 %)
	Part-time	30 236 (17 %)	30 090 (17 %)	30 253 (17 %)	29 782 (17 %)	29 015 (17 %)	29 072 (16 %)
EU movers	Full-time	4 292 (76 %)	4 620 (78 %)	4 818 (78 %)	4 554 (78 %)	4 666 (79 %)	5 088 (79 %)
	Part-time	1 320 (24 %)	1 328 (22 %)	1 382 (22 %)	1 259 (22 %)	1 277 (21 %)	1 371 (21 %)
Third-country nationals	Full-time	5 046 (73 %)	5 446 (74 %)	5 869 (74 %)	5 889 (75 %)	6 119 (76 %)	7 001 (77 %)
	Part-time	1 862 (27 %)	1 944 (26 %)	2 022 (26 %)	1 934 (25 %)	1 905 (24 %)	2 091 (23 %)

Note: Percentages in brackets indicate the proportion of workers in each nationality category in that employment form.

Source: EU-LFS 2022, custom extraction by Milieu.

Table 40: Share of part-time contracts by nationality group, 2021-2022

	Nationals			EU movers			Third-country nationals		
	2021	2022	Diff. (Pps)	2021	2022	Diff. (Pps)	2021	2022	Diff. (Pps)
EU-27	17	16	-1	22	21	-1	24	23	-1
AT	29	30	+1	27	30	+3	27	27	0
BE	24	23	-1	22	22	0	24	23	-1
BG	1	1	0						
CY	10	9	-1	10	7	-3	9	7	-2
CZ	6	6	0	7	5	-2	5	5	0
DE	28	28	0	25	24	-1	29	29	0
DK	21	21	0	21	19	-2	23	21	-2
EE	11	12	+1				9	14	+5
EL	8	8	0	(13)			15	13	-2
ES	13	13	0	14	12	-2	19	18	-1
FI	15	15	0	16	11	-5	19	18	-1
FR	17	16	-1	21	22	+1	23	22	-1
HR	5	5	0						
HU	4	4	0						
IE	18	18	0	14	12	-2	(7)	12	+5
IT	17	17	0	23	22	-1	26	25	-1
LT	6	5	-1						
LU	22	21	-1	11	14	+3	15	13	-2
LV	7	6	-1				(8)		
MT	11	11	0	6	(4)	-2	5		
NL	40	39	-1	27	27	0	34	31	-3
PL	5	5	0						
PT	7	6	-1					(7)	
RO	4	3	-1						
SE	19	18	-1	17	17	0	23	20	-3
SI	9	8	-1				(6)	(4)	-2
SK	3	3	0						
EFTA	34	33	-1	25	25	0	36	35	-1
CH	42	42	0	27	27	0	37	36	-1
IS	20	20	0	10					
NO	22	21	-1	15	13	-2	32	30	-2

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 2022, custom extraction by Milieu.

Table 41: Employment rate of male and female EU movers, 2017-2022

	Male			Female		
Country	2017	2022	Diff (pps)	2017	2022	Diff (pps)
EU-27	81	84	+3	66	70	+4
AT	84	84	0	71	75	+4
BE	75	80	+5	63	70	+7
CY	83	(92)	+9	70	79	+9
CZ		(96)		77	(76)	-1
DE	87	88	+1	68	74	+6
DK	86	(95)	+9	72	(78)	+6
EL	75			50	44	-7
ES	74	77	+3	61	62	+1
FI		(93)			(75)	
FR	74	77	+3	67	72	+4
IE	87	(95)	+8	72	(81)	+9
IT	77	83	+6	60	58	-2
LU	81	81	+1	72	77	+5
MT					(85)	
NL	86	(91)	+6	73	80	+7
SE	84	(91)	+7	77	(87)	+10
EFTA	88	88	-1	77	79	+2
CH	89	87	-2	77	78	+1
IS		(94)				
NO		(95)			(84)	

Note: Unreliable estimates are highlighted in brackets. Countries without values for either year are omitted.

Source: EU-LFS 2022, custom extraction by Milieu.

Table 42: Part-time employment and fixed-term contracts by nationality group and gender (%), 2022

MS	Part-time employment				Fixed-term contracts			
	EU movers		Nationals		EU movers		Nationals	
	Female	Male	Female	Male	Female	Male	Female	Male
EU-27	17	13	13	11	36	8	27	7
AT	8	9	6	5	47	14	52	11
BE	14	11	8	6	35	9	38	10
BG			3	4			2	1
CY	(7)	(3)	8	6	15		12	6
CZ	15	7	7	5	11	(2)	10	3
DE	15	12	10	9	44	9	47	10
DK	(11)	(8)	10	8	29	12	31	12
EE			2	3			17	7
EL	(23)		12	7			12	5
ES	19	17	23	17	21	4	20	6
FI	25	(10)	16	11	24		21	10
FR	21	15	15	13	37	7	25	7
HR			17	12			6	3
HU			5	5			6	2
IE			7	6	20	(5=	29	8
IT	22	21	18	14	38	6	30	7
LT			2	1			7	4
LU	8	6	6	6	25	5	36	7
LV			2	3			8	4
MT			5	3	(11)		19	5
NL	33	26	25	21	42	11	62	19
PL			16	14			7	3
PT			16	16			9	4
RO			1	3			3	4
SE	22	(9)	13	10	31	(5)	27	11
SI			12	9			11	5
SK			4	4			4	2
EFTA	11	9	9	7	44	11	50	17
CH	12	10	9	8	48	12	65	21
IS	14		15	9			33	9
NO			8	5	31		31	12

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 2022, custom extraction by Milieu

Table 43: Share of EU movers by educational attainment, 2021

	Low (ISCED 0-2)			Medium (ISCED 3-4)			High (ISCED 5-8)		
Country	2017	2022	Diff (pps)	2017	2022	Diff (pps)	2017	2022	Diff (pps)
EU-27	28	29	+1	43	38	-5	29	32	+4
AT	11	13	+2	49	45	-5	39	42	+3
BE	25	19	-5	35	32	-3	41	49	+8
CY	22	18	-3	50	47	-3	28	34	+6
CZ	5	7	+2	59	53	-6	37	41	+4
DE	30	37	+7	45	38	-8	25	25	+1
DK	4	10	+6	30	38	+8	66	52	-14
EL	29	29	+1	52	43	-10	19	28	+9
ES	29	32	+3	41	36	-5	31	32	+2
FI	34	21	-13	48	55	+7	18	23	+6
FR	39	34	-5	31	32	+1	29	34	+4
IE	5			45			50		
IT	35	33	-3	52	55	+3	12	12	0
LU	28	21	-7	26	19	-7	46	60	+14
MT	23	11	-12	28	41	+13	49	48	-2
NL	17	26	+8	47	24	-23	35	51	+15
PT		(18)			(22)			(61)	
SE	18	14	-4	25	16	-9	57	70	+13
SI	21			38			41		
EFTA	20	21	+1	35	31	-3	45	48	+3
CH	22	22	+1	33	29	-4	46	49	+3
IS		19			41			40	
NO	8	13	+5	47	42	-6	45	45	0

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 2022, custom extraction by Milieu.

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ISBN 978-92-68-12031-6

doi: 10.2767/388182

KE-BQ-24-001-EN-N