

SKILLS FOR TOMORROW: UNLOCKING THE POTENTIAL OF MOBILITY AND LABOUR MIGRATION

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INTRODUCTION

Europe is facing a demographic crisis. Its population is declining, while its need for labour is growing. In 2024, 75% of employers across Europe struggled to find workers with the right skill sets.¹ Along with high energy prices, red tape and difficulties in accessing finance, a lack of specialised labour is regularly cited as one of the principal threats to the EU's competitiveness. Amidst the green and digital transitions, the EU's working age population is due to shrink by 27 million by 2050, further exacerbating existing challenges.²

In this context, addressing labour shortages and skills gaps will become ever more urgent, based on sound skills anticipation and intelligence. This includes enhancing national skills strategies and strengthening the effectiveness of active labour market policies (ALMPs).³ On their own, however, these will be insufficient to address needs at the scale necessary to maintain the EU's competitive edge. Improved and well-calibrated opportunities for intra-EU mobility and labour migration from third countries will also be needed to alleviate the pressure.

Recent European and national elections, and the start of a new EU policy cycle, bring both challenges and opportunities in this regard. On the one hand, they provide an occasion to reflect on how to make frameworks governing intra-EU mobility and labour migration fit for purpose, based on actual needs and in line with stated EU priorities. On the other hand, the potential dominance of anti-immigration agendas in the new cycle may lead to a prioritisation of short-term national interests, increasing regional disparities and fragmentation.

Against this backdrop, this Report analyses the prospects for enhancing labour migration in the new EU cycle, also considering the dynamics of intra-EU mobility. After an examination of past initiatives, and an assessment of recent developments and relevant priorities for the new Commission, it concludes with policy recommendations. These focus on how to maintain the EU's competitiveness through the conclusion, transposition and effective implementation of labour migration frameworks, other than improved job-matching and skills recognition.

BACKGROUND: LIMITED SUCCESS IN ADDRESSING COMMON SKILLS GAPS AND LABOUR SHORTAGES

In recent years, the EU has seen relatively low mobility among nationals of member states. Intra-EU mobility of non-EU nationals also remains limited, while efforts to facilitate labour migration from non-EU countries have focused on simplifying procedures and improving job matching.

In the EU, the free movement of persons, including the right to seek a job in another member state, underpins the functioning of the Single Market.⁴ The right to free movement should also serve as a mechanism to address labour market needs, with studies estimating that it could assist in alleviating labour imbalances in about two-thirds of EU shortage occupations.⁵

Yet, EU citizens' movement within the EU is slowed down, among others, by language barriers and difficulties in accessing information about socio-economic rights, including social security benefits.⁶ Due to concerns over social welfare, some member states have also restricted unemployment benefits for the economically inactive or linked eligibility to stricter residence conditions.⁷

The recognition of qualifications also raises challenges. Only a few highly-skilled professionals benefit from the automatic recognition of their qualifications when moving within the EU.⁸ Other professions falling within the mid to low-skilled range are not evenly regulated across the Union, with licenses required in some countries but not others for the same occupations.⁹ This can disincentivise workers' mobility to more regulated markets.

Illustrating these challenges, in 2022, only 9.9 million (3.8%) of the EU's working age population were long-term EU movers (persons having moved for at least one year). Cross-border workers, who live in one member state but regularly cross the border to work in another, totalled 1.8 million people.¹⁰ These figures suggest that the existing free movement regime may fail to deliver on its potential to fill shortage occupations (see Figure 1).

Total number of mobile workers in the EU in 2022

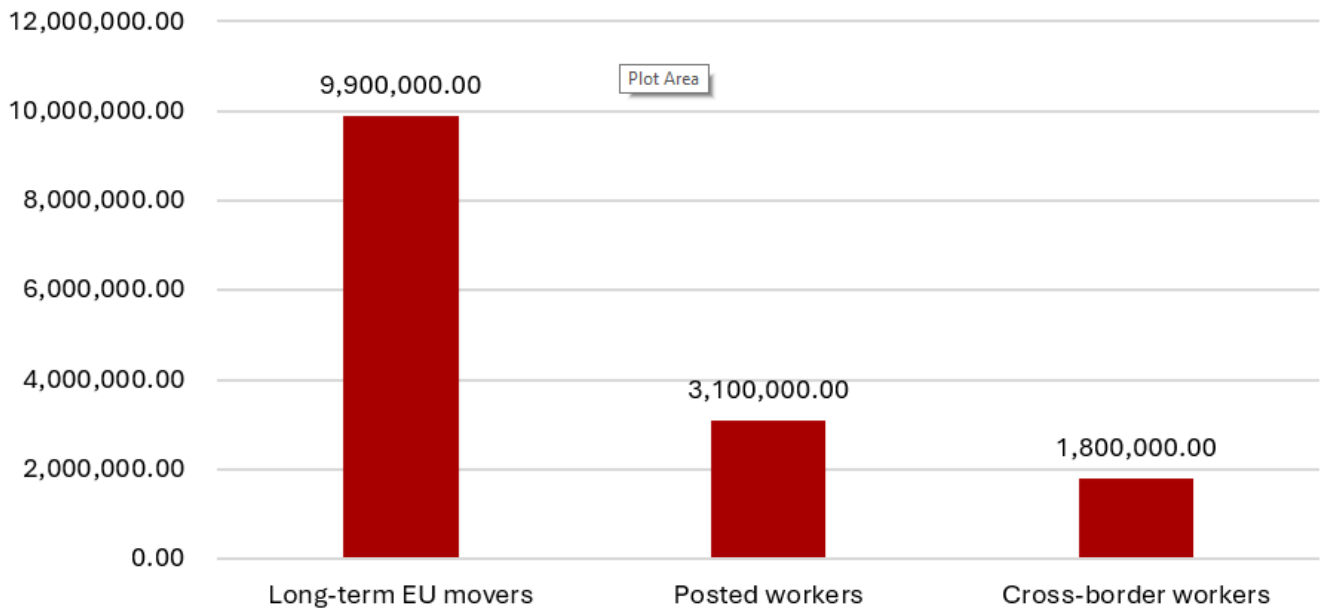


Figure 1. Total number of mobile workers in the EU in 2022 (compared to a total working age population of approximately 260 million). Author's own elaboration.

In this context, the posting of workers has become an attractive way to perform temporary services abroad. Yet, where rules on the posting of workers are not adhered to, it also raises concerns for social dumping, including in the construction, agri-food, hospitality and transport sectors.¹¹

Intra-EU mobility can also drive brain drain in sending countries and entrench 'talent development' traps. Some member states have accordingly incentivised their mobile national workers to return home, with the number of people returning jumping by 11% from 2020 to 2021.¹²

At the same time, supporting EU nationals' "freedom to stay" by providing meaningful opportunities for work and access to services at home gained momentum, featuring prominently in Enrico Letta's 2023 report on the Single Market.¹³

While the mobility of EU citizens has seen little change in recent years, efforts in the past EU cycle (2019-2024) sought to enhance intra-EU mobility for non-EU nationals. Non-EU nationals who are long-term residents can in principle move across the Union for work purposes, although subject to strict conditions. To begin with, to be eligible for a long-term resident's permit, they must have resided in the EU for five years. In addition, when intending to move to another

member state for work purposes, they can also be subject to a labour market test.¹⁴

In 2022, the European Commission proposed to revise the framework regulating intra-EU mobility for non-EU nationals – the Long-Term Residents Directive. The Commission proposed retaining the five-year residence requirement, but making it possible to accumulate residence periods in different member states, and removing labour market tests.¹⁵ Despite support among some member states and the European Parliament, the proposed reform stalled, among others, due to concerns over the administrative burden of recording periods abroad.¹⁶

In the past cycle, EU initiatives also sought to facilitate labour migration from third countries. While admission volumes are determined by member states, the EU is responsible for setting the conditions of entry and stay of non-EU nationals, and can, in this way, support European businesses to attract workers with the required skills and qualifications.

Yet, impact assessments and studies highlighted various factors limiting the uptake and ability of applicable EU frameworks (see Figure 2).¹⁷ These included the length and cost of procedures, the number of documents required, and limited knowledge about rights.¹⁸ At the same time, the existence of parallel national schemes led to significant variations in the use of the EU-wide frameworks.

Number of EU permits issued in 2022

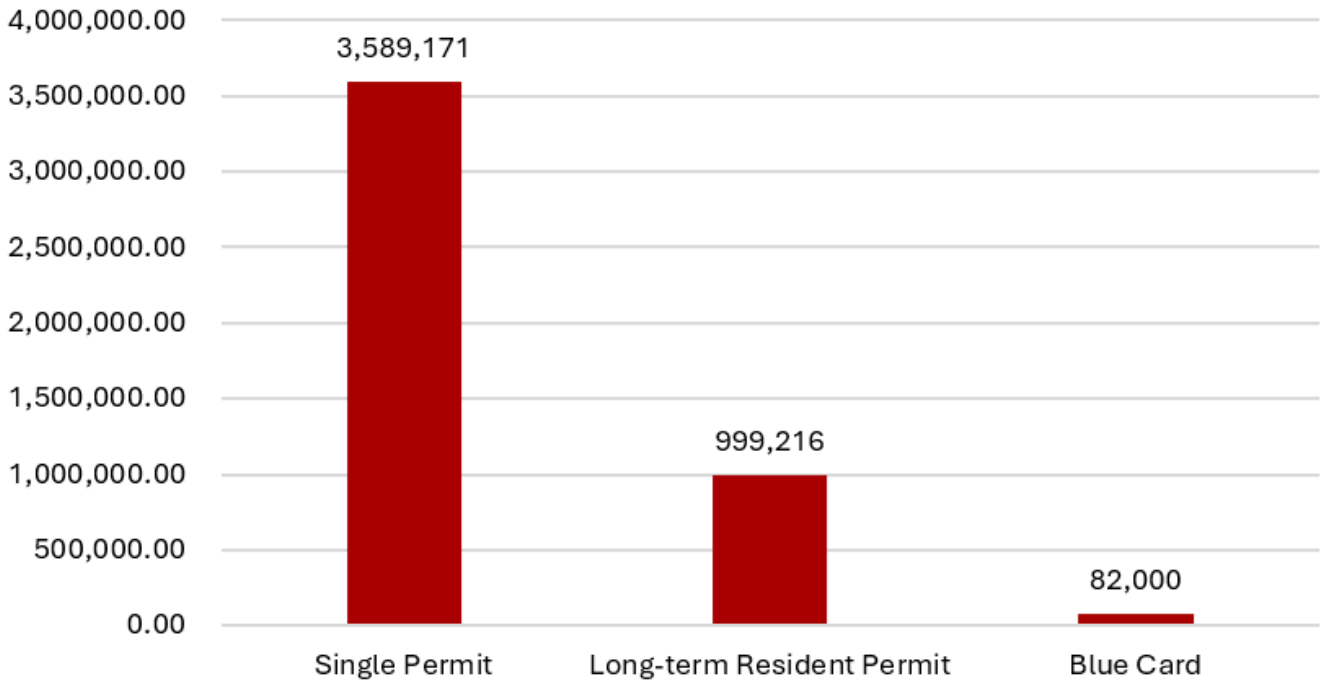


Figure 2: Total number of EU Blue Card, Long-term Resident and Single Permit issued in 2022. Author's own elaboration.

In response, the EU revised the Blue Card Directive in 2021, which aims to facilitate labour migration for highly-skilled workers in particular.¹⁹ While national schemes remain possible under the revised Directive, mostly to develop tailored-made approaches to specifically meet the requests of national employers, the revision broadened the Directive's scope, eased eligibility requirements and strengthened intra-EU mobility rights for Blue Card holders.²⁰

In 2024, to shorten the length and simplify the complexity of procedures, the Single Permit Directive was also revised.²¹ Under the Directive, workers across skill levels can obtain a right to reside and work in the EU. Other than decreasing processing times and improving access to information, single permit holders will be able to change employers, and benefit from a longer period of unemployment without losing residence rights.

Previously, in 2023, as part of its European Skills Agenda, the European Commission also launched the Skills and Talents Mobility Package.²² Central to this, the EU Talent Pool was proposed to facilitate job matching across skill-levels through an online platform, targeting shortage occupations, including those necessary to drive the green and digital transitions.²³ The Commission's proposal also sought to improve access to information on recruitment and migration procedures.

Yet, according to the proposal, participation in the Talent Pool would be voluntary for member states. This, analysts have argued, may discourage participation, if certain member states perceive others as more likely to attract workers.²⁴ Jobseekers' may also be discouraged if the participating states do not offer the most attractive professional prospects, limiting the Pool's potential to improve matchmaking and address shortages across the EU.

Not concluded in the previous cycle, the negotiation of the Talent Pool creates potential opportunities in the new cycle for improving the Commission's original proposal, but also begs the question of whether the European Council and Parliament will prioritise its negotiation.

In 2021, the Commission also launched the Talent Partnerships initiative.²⁵ The initiative provides a structured framework for cooperation between member states and non-EU countries, combining education and training with labour mobility opportunities.

The European Commission accordingly started developing Talent Partnerships with Egypt, Morocco, Tunisia, Pakistan and Bangladesh.²⁶ These countries tend to have relatively young populations, for whom training, or work, could offer an attractive prospect.

The first set of concrete programmes involving Bangladesh was announced in July 2024, with the participation of Italy and Germany, and a focus on sectors including ICT, agriculture and hospitality.²⁷ Questions remain about the scale of Talent Partnerships, however, which will depend on the level of investment from member states, partner countries and employers.

More broadly, Talent Partnerships, aim to create a comprehensive framework for the management of migratory flows. Other than addressing labour shortages in specific sectors of EU labour markets, they also aim to strengthen cooperation with third countries to boost the prevention of irregular migration, raising questions about their implementation in the new cycle.

Initiatives seeking to align labour migration opportunities with labour market needs also depend on efforts to address practical challenges, with some noteworthy developments also taking place on this front during the previous cycle.

Promoting a “skills first” approach, the European Commission, for example, put forward a set of recommendations in 2023 for member states to simplify and expedite skills recognition procedures.²⁸ These encouraged increased investment into the capacity of national authorities, and the reduction of administrative burdens. The Commission also pledged to assist in strengthening access to information and developing interoperable databases for comparability of qualifications, other than exploring the feasibility of establishing a Union-wide tool.

Through its Technical Support Instrument, the EU can now also provide member states with technical expertise to develop tools and methodologies for qualification recognition and skills validation, among other measures to promote entry into the labour market.²⁹

Overall, these developments show that EU level initiatives can promote harmonised practices and support simplified procedures to facilitate the recruitment of non-EU nationals across skills levels. However, member states can also develop bilateral agreements with third countries or issue national permits, on top of being responsible for setting admission volumes. National approaches can offer greater flexibility in their design compared to EU-wide joint initiatives, including lower eligibility and administrative requirements, and can be tailored to address specific sectoral shortages.

Pursuing national priorities can also lead to fragmentation, as a higher share of skilled workers are drawn to more ‘attractive’ member states. Yet, so long as the added-value of EU-wide action remains limited, and national schemes are able to offer more attractive prospects, the EU will continue to struggle to pursue ambitious labour migration programmes that can boost the Bloc’s overall competitive edge.

Relatedly, another area where EU initiatives failed to bring about a level playing field is integration. This is connected to living and working conditions, which tend to be critical factors when deciding to move to the EU for work purposes. While salary can weigh heavily for the highly-skilled, for example, access to language training and support for families across skill levels can increase the EU’s attractiveness.

Yet, integration is a member state competence, where the EU can only provide guidance and coordination, and financial support to member states. While some member states rate highly for their approach to integration, others provide migrants with little to no support.³⁰ This can contribute to differing labour prospects, limiting the attractiveness of some member states over others. It can also hamper retention prospects, other than impacting social cohesion.

STATE OF PLAY: MIGRATION AND MOBILITY FOR COMPETITIVENESS

At the outset of the new cycle, challenges remain. However, recent developments, including the definition of the priorities of the new Commission, underscore the need to boost the EU’s competitiveness and address skills gaps and labour shortages.

In his 2024 report on the future of the Single Market, for example, former President of the European Central Bank (ECB) and former Italian Prime Minister Mario Draghi highlighted that the competitiveness of the EU economy

depends on closing these gaps and shortages, raising questions about how to effectively improve existing frameworks in the new cycle.³¹

To that end, the President of the European Commission, Ursula von der Leyen, has tasked the new Commissioner for People, Skills and Preparedness with establishing a “Union of Skills” in the new 2024–2029 cycle. This ought to promote intra-EU mobility through further work on a European Degree as well as a “Skills Portability Initiative” for the cross-border recognition of skills and qualifications.³²

Meanwhile, the new Commissioner for Cohesion and Reforms will be responsible for the “right to stay”, suggesting that the EU’s attention will be split between different policy objectives.³³

In this context, other than labour market policy initiatives to stimulate the participation of all inactive national workers, and promote balanced intra-EU mobility initiatives, leveraging well-calibrated opportunities for labour migration and promoting the labour inclusion of non-EU nationals will remain necessary to address gaps and shortages.³⁴

Yet, the changing political climate, and consolidation of political forces with anti-immigration agendas following the European Parliament’s elections of June 2024, will also pose a fundamental obstacle. Short-term national and local interests may be prioritised, making it more difficult to reach consensus on balanced, EU-wide policies.³⁵ At the same time, policymakers will likely continue to focus on how to reduce irregular migration.³⁶

This will make it harder to pursue ambitious initiatives on labour migration in the new cycle. Pragmatically, the EU may turn its attention to the adequate implementation of recently reformed rules as well as the conclusion of negotiations of proposals that still remain on the table.

Avoiding divergences in the transposition and implementation of recently reformed labour migration frameworks will be key to demonstrating their added-value, considering previously low uptake.

Under the Blue Card, for example, member states still retain discretion to determine the minimum salary threshold or the occupations where substitution of experience for qualifications is permissible. This already points to potential fragmentation which may limit the scheme’s attractiveness and impact.³⁷

Efforts promoting the harmonised transposition of the reformed Single Permit could also avoid fragmentation. For example, practical challenges that stand in the way of implementation should be addressed, ensuring, among others, sufficient access to information as well as recourse mechanisms in case of exploitation.

An opportunity to shift attention to the implementation of the legal migration *acquis* could come from the recently adopted reforms under the New Pact on Migration and Asylum.³⁸ While this formally concerns asylum reforms, the envisaged Pact’s implementation milestones, including the EU-wide ‘Common Implementation Plan’ developed by the Commission point to the importance of skills recognition, efficient matching and cooperation with partner countries. Stronger coordination with member states, and the elaboration of national plans, could present an opportunity

to build labour migration initiatives based on evidence and needs, ensure buy-in from member states, and assess funding needed for their effective implementation.³⁹

At the same time, in the new cycle, the EU will likely focus its efforts on concluding the negotiations of key files, such as the EU Talent Pool.⁴⁰ To advance in the negotiations, co-legislators will, however, have to find common positions on the voluntary nature of the Pool, as well as other key provisions. These include whether “employers” includes other entities, like private employment agencies.

In the new cycle, the Talent Partnerships are also set to remain a key element in the EU’s approach to cooperation with non-EU countries.⁴¹ The European Commission is currently assessing which other third countries it should focus on to develop future Partnerships. Efforts to address the drivers of irregular migration may lead to the prioritisation of countries of origin or transit.⁴² This may impact the added value of the Partnerships for boosting the EU’s capacity to address existing and future gaps and shortages, and decrease their attractiveness for potential future partners.

While the EU’s actions may focus in these areas in the new cycle, further opportunities may arise that can demonstrate the EU’s added-value and create impetus for a common approach to improve the attractiveness of the Union to non-EU nationals. However, challenges will also remain, among others, due to the division of competences, conflicting priorities, and financial constraints.

First, with the mid-term review of the EU’s Action Plan for Integration and Inclusion, an occasion to reflect on how to improve working and living conditions across the Union will arise.⁴³ Here again, the Common Implementation Plan offers a useful starting point for identifying existing gaps, as the Commission acknowledged.⁴⁴ But, it will be important to connect EU coordination and funding initiatives to address the needs of all non-EU nationals, not just asylum seekers and refugees.

Second, the Multiannual Financial Framework (MFF) will likely constitute a battleground over different priorities in the new cycle and beyond. Currently, a large portion of the EU’s migration and asylum funds address irregular migration, with an additional €2 billion allocated to border management during the recent mid-term review of the 2021 - 2027 MFF.⁴⁵ Negotiations on the next MFF, due to start after summer 2025, present an opportunity to better leverage labour migration through increased funding, enabling the adaption of (recognition) processes, supporting the implementation of existing and new frameworks, including the Blue Card and Single Permit, as well as the operationalisation of the Talent Pool.

And yet, the negotiations on the next MFF may not only prove complex in a context of greater fiscal constraints but may, as pressure also mounts to address irregular migration, also lead the EU to overlook needs to support the implementation of labour migration and integration initiatives, and financially support other strategic priorities instead.

PROSPECTS: LOW-HANGING FRUIT OVER AMBITIOUS REFORM

Despite the many challenges that the start of the new EU political cycle brings with it, skills gaps and labour shortages will remain. Further improvements to the EU’s migration and mobility frameworks will be needed to boost the Bloc’s growth and competitiveness in this context, calling for targeted actions. This Report accordingly puts forward the following recommendations:

1) Strengthen awareness of labour market needs: through standardised procedures, the EU should strengthen methods to collect data on and map shortage and surplus occupations in the EU, aiming to achieve comparable data between the EU and non-EU countries with high potential to fill skills gaps and labour shortages. The Talent Partnerships could provide a suitable framework to collect and analyse data in this context. Together with EU agencies, such as CEDEFOP and the European Training Foundation (ETF), labour authorities and social partners, this information should feed into skills anticipation, which digitalisation and AI could facilitate through real-time labour market analysis.

2) Strengthen job-matching in line with credentials: consistently with political priorities, completing negotiations on the EU Talent Pool should be a key focus in the new cycle. To ensure responsiveness to labour market needs, the list of shortage occupations should be subject to speedy adjustment, based on labour market fluctuations. Considering their knowledge of labour market dynamics, other entities engaged in matching, like private employment agencies, should be able to participate in the Pool. Automatic matching may minimise the administration burden on states but should be accompanied by appropriate human rights safeguards to minimise the risk of bias.

3) Strengthen recognition of qualifications and skills validation: in the context of intra-EU mobility, the EU should consider harmonising licensing requirements to remove barriers to worker mobility. These efforts should be based on evidence-based assessments to determine in which additional sectors and occupations, including at mid-low skill level, harmonisation would bring added-value. In line with a ‘skills first’ approach, other than promoting faster recognition of EU and non-EU qualifications, member states should be supported to strengthen and align processes for the validation of skills, for example, under the Technical Support Instrument. At the same time, actions to reduce red tape and costs when pursuing recognition of non-EU credentials should be pursued, including through investments into digitalisation.

4) Ensure fast transposition and proper implementation of the Blue Card and Single Permit Directives: to encourage a level-playing field, the European Commission should closely monitor and ensure the adequate implementation of both frameworks. The Commission should further facilitate opportunities for mutual learning between member states, to exchange best practices, in particular, on practical measures that have made it easier for employers or job seekers to obtain a permit. For the Single Permit, member states should adopt expansive interpretations, providing flexibility to job seekers and benefits for employers.

5) Focus on 'brain gain' when developing Talent

Partnerships: While addressing irregular migration will remain a key objective in the new EU cycle, prioritising this in the selection of potential partner countries could undermine the EU's ability to use Talent Partnerships to advance 'brain gains' for all actors involved. Selecting countries that stand

to benefit the most from this scheme, and providing meaningful training and labour opportunities for their nationals, also helps maintain partner countries' buy-in through positive incentives rather than punitive measures, such as withholding funding, also reducing EU's overall spending.

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The European Migration and Diversity (EMD) Programme provides independent expertise on European migration and asylum policies. The EMD Programme's analyses seek to contribute to sustainable and responsible policy solutions and are aimed at promoting a positive and constructive dialogue on migration. The Programme follows the policy debate taking a multidisciplinary approach, examining both the legal and political aspects shaping European migration policies. EMD analysts focus, amongst other topics, on the reform of the Common European Asylum System; the management of the EU's external borders; cooperation with countries of origin and transit; the integration of beneficiaries of international protection into host societies; the links between migration and populism; the development of resettlement and legal pathways; and the EU's free movement acquis. The EMD team benefits from a strong network of academics, NGO representatives and policymakers, who contribute regularly to publications and policy events.

The EPC's Europe's Political Economy Programme (EPE) is dedicated to covering topics related to EU economic governance, the single market, industrial and digital policies, and strategic autonomy in a context of deep geo-economic and technological shifts. The Programme has contributed actively to these debates over past years, leveraging its convening power, analysis and multistakeholder taskforce model. EPE analysts pioneered the concept of a 'wartime economy' following Russia's invasion of Ukraine, and the Programme is currently running projects focusing on the EU's ambitions and the private sector's capacity to deliver on the "triple" green, digital and economic security transitions. As fast-advancing components of 'economic security', digital and emerging technologies, such as quantum, are priority areas of focus. Linked to the changing international context, the Programme also focuses on trade policy, the transatlantic agenda, notably the EU-US Trade and Technology Council, China, and the EU's close economic partnerships (UK, EEA, Switzerland). The EPE Programme consists of a young and dynamic team, with recent recruitments bolstering analytical capacities linked to economic growth and crises, resilience and recovery, emerging tech and cybersecurity.

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