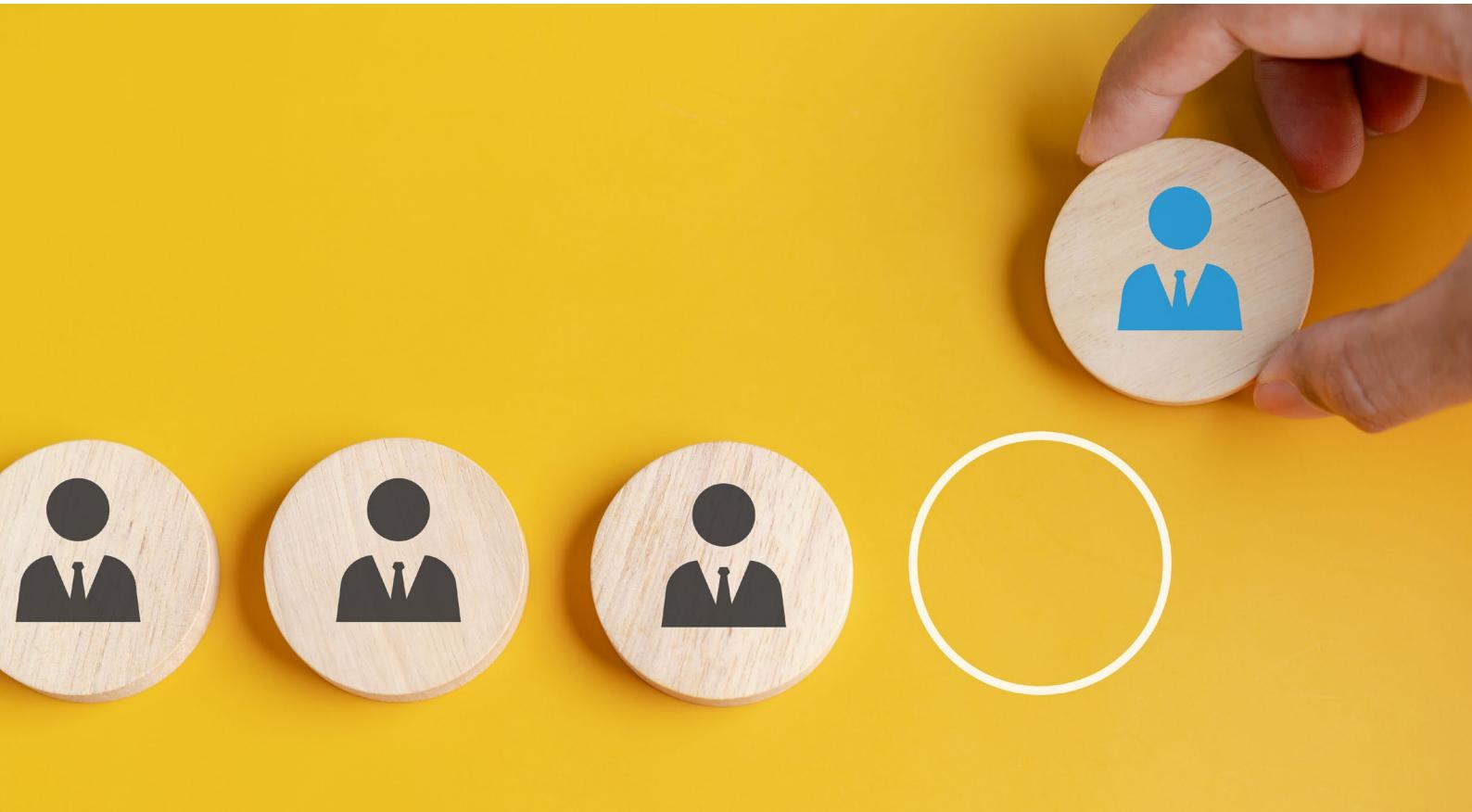




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Labour migration in times of labour shortages

European Migration Network –
OECD joint inform

December 2025

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EXPLANATORY NOTE

This inform corresponds to the executive summary of the study “Labour Migration in times of labour shortages” that was prepared on the basis of national contributions from 25 EMN NCPs (AT, BE, BG, CY, CZ, DE, EE, EL, ES, FI, FR, HU, HR, IE, IT, LT, LU, LV, MT, NL, PL, SE, SI, SK and RS) collected via a common template developed by the EMN NCPs to ensure, to the extent possible, comparability. The information contained in this inform refers to the situation in the abovementioned EMN Member and Observer Countries from January 2021 up to June 2024.

Statistics were sourced from Eurostat, national authorities and other (national) databases.

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1. KEY POINTS TO NOTE

- Labour migration is increasingly recognised as a key strategy to tackle persistent labour shortages across EMN Member and Observer Countries¹, driven by challenges in recruitment, demographic changes, economic transitions and the lingering impacts of the COVID-19 pandemic.
- EMN Member Countries and Serbia also highlighted challenges and risks associated with labour migration such as recruiting over-qualified foreigners, language and cultural integration hurdles, heightened risks of exploitation, poor working and living conditions and added pressure on housing and public services.
- Across EMN Member Countries and Serbia labour shortages are often defined as an imbalance between vacancies and available workers – assessed through quantitative metrics and qualitative evaluations of skills mismatches.
- Extensive legal and policy reforms have been implemented since 2021. Many EMN Member Countries combine demand-driven with mixed approaches and have implemented practical changes including digitalisation and fast track procedures to better align migration with labour market needs.
- National practices for attracting and recruiting foreign talent predominantly rely on initiatives led by employers and private recruitment agencies, which include bilateral agreements, quality-assurance measures and diverse advertising strategies.
- EMN Member Countries rely, to some extent, on EU initiatives and instruments on labour migration developed since 2021, such as the EU Talent Partnerships as well as the EU-funded projects under the Migration Partnership Facility supporting the implementation of Talent Partnerships.



2. INTRODUCTION

The EMN-OECD joint study on “Labour migration in times of labour shortages” provides an overview of labour migration laws and policies, as well as initiatives and practices of EMN Member Countries and Serbia² targeting third-country nationals between January 2021 and June 2024. It complements the 2024 EMN inform on ‘New and Innovative Ways to Attract Foreign Talent into the EU’³ and explores how EMN Member and Observer Countries⁴, and non-EU OECD Countries, use labour migration to address current labour shortages and prevent future ones.

This includes an update on the context, the main countries of origin and crucial labour migration sectors. It also provides an overview of legislative and policy developments, and an analysis of best practices, lessons learned and challenges with regard to labour migration.

The study looks at labour shortages and labour migration at all skill levels and includes all third-country nationals moving to an EMN Member or Observer Country for the purpose of employment.



3. CONTEXT

Labour migration is one strategy for addressing labour shortages in EMN Member and Observer Countries, as well as in OECD Countries. The EU faces labour shortages at all skill levels and across several sectors – including healthcare, construction and ICT – due to recruitment issues and driven by more recent changes such as demographic ageing, the digital and green transitions, and the impacts of the COVID-19 pandemic. One of the core challenges is the need to attract, retain and integrate talent from abroad to meet rapidly evolving EU’s labour market demands. The EU already provides several legal pathways for labour migration. This framework is reinforced by

the Union of Skills, adopted in March 2025, the EU Skills Agenda, the Skills and Talent Package and the Skills and Mobility Package, which promote strategic initiatives such as the Labour Migration Platform, the proposed EU Talent Pool, with the aim of attracting talent and better aligning migration with labour market needs as well as the Talent Partnerships, mutually beneficial partnerships between the EU and partner countries – open to all skill levels – focusing on skills development and international labour mobility to the EU, as part of a comprehensive approach to migration management.

¹ Note for the reader: The key points/executive summary section provides a summary of the main information contained in the inform or study. For ease of reading, key points do not contain footnotes. Please note that EMN Member and Observer Countries referred to in the key points or executive summary are listed in the relevant sections within the current document.

² AT, BE, BG, CY, CZ, DE, EE, EL, ES, FI, FR, HU, HR, IE, IT, LT, LU, LV, MT, NL, PL, SE, SI, SK, and RS.

³ European Migration Network (EMN) and Organisation for Economic Co-operation and Development (OECD), ‘New and Innovative Ways to Attract Foreign Talents in the EU – EMN inform’, February 2025, https://home-affairs.ec.europa.eu/document/download/3815a1dd-02e9-43ef-932e-f461eb7bc8e4_en?filename=2025_EMN-OECD_inform_attracting_foreign_talent.pdf, last accessed 8 April 2025.

⁴ As Serbia is the only EMN Observer Country participating in this study the mention onwards will be EMN Member Countries and Serbia.

4. LABOUR SHORTAGES: DEBATE AND CONCEPTUALISATION

There is no universally recognised definition of labour shortages. However, EMN Member Countries⁵ and Serbia frequently use both 'labour shortage' and 'shortage occupation' as concepts to describe situations where job vacancies exceed the available supply of workers. Although no formal legal definition exists, 11 EMN Member Countries⁶ and Serbia view shortages as an imbalance between supply and demand – measured either through quantitative metrics, such as vacancy rates and applicant-to-vacancy ratios, or via qualitative assessments of skills mismatches – often referring to critical sectors within shortage occupations lists.⁷

Within EMN Member Countries and Serbia, labour shortages have emerged as a persistent structural challenge, driven by demographic aging, the aftermath of the COVID-19

pandemic, and evolving sector-specific demands. With domestic labour supplies unable to meet market needs fully, EMN Member Countries have increasingly turned to immigration as a policy instrument. As shown by Eurostat data, five EMN Member Countries⁸ issued more than 50% of their residence permits for employment reasons, and 15 EMN Member Countries⁹ reported that shortages affect sectors at all skill levels.

Public debates on labour migration are multifaceted and vary regionally. Debates are often driven by pressing labour shortages due to demographic developments and significant labour shortages in specific sectors.¹⁰ In three EMN Member Countries,¹¹ debates have addressed issues such as potential exploitation, integration challenges and the impact on local labour standards.



5. LABOUR MIGRATION LEGAL AND POLICY FRAMEWORKS

With regard to labour migration policy approaches, 16 EMN Member Countries¹² and Serbia have adopted a primarily demand-driven labour migration approach based on employer-led recruitment, while seven EMN Member Countries use a mixed approach with multiple strategies (such as the demand-driven, occupation-driven and human capital approach).¹³ Nine EMN Member Countries¹⁴ combine multiple strategies to address labour shortages, including points-based systems and frameworks that balance employer needs and sector requirements.

Within these approaches, changes to legal and policy frameworks have been extensive.¹⁵ EMN Member Countries have streamlined procedures through digitalisation¹⁶ and fast-track procedures.¹⁷ Others have revised (some aspects of) their quota systems for example by increasing the quota or made changes regarding categories of workers not falling under quota regulations,¹⁸ introduced targeted measures for key sectors¹⁹ (such as healthcare, IT, construction and tourism), and have also measures in place to facilitate inclusion of family members in the labour market.²⁰ Thirteen EMN Member Countries are planning further

legal and policy changes to address labour shortages through labour migration, although in different directions.²¹

Across EMN Member Countries²² and Serbia, different stakeholders cooperate in policy design and implementation with regard to labour migration. Five EMN Member Countries²³ have established dedicated interministerial committees and specialised bodies for strategy oversight.²⁴ In five countries, social partners such as employee representatives formally contribute to developing shortage occupation lists, setting quotas or offering policy input.²⁵ Regional and local authorities play a key role in three countries.²⁶ In some cases, private sector stakeholders are engaged directly.²⁷

With regard to the type of shortages, 13 EMN Member Countries²⁸ and Serbia address a mix of short-term and medium-to-long-term labour shortages, while eight EMN Member Countries²⁹ focus specifically on short-term or acute shortages.

Various policy instruments are used to address labour shortages. These include adjustments of labour market

5 AT, BE, BG, CZ, DE, EE, EL, FI, FR, HU, IE, IT, LT, LU, LV, NL, PL, SK.

6 BE, DE, EE, FI, FR, IE, IT, LV, NL, PL, SK.

7 AT, BE, EE, FI, FR, IE, LT, LU, SK.

8 HR, LT, MT, PL, SK.

9 AT, BE, CZ, DE, EE, EL, FR, HU, IE, IT, LT, LU, NL, PL, SE.

10 AT, BE, CY, DE, EE, EL, FR, IE, LU, LV, SK.

11 AT, EE, IT.

12 AT, CY, CZ, DE, EL, FI, HU, IE, LT, LU, LV, MT, NL, PL, SE, SI.

13 BE, BG, DE, ES, FR, HR, SK

14 BE, BG, DE, ES, FI, FR, HR, IE, SK.

15 AT, BE, BG, CY, CZ, DE, EE, EL, ES, FI, FR, HU, HR, IE, LT, LU, LV, MT, PL, SE, SK.

16 AT, BE, DE, EE, FR, IE, LT, NL, SE.

17 DE, EE, FI, FR, IE, LT, LU, NL, SE, SK.

18 AT, CY, CZ, DE, EE, EL, HU, HR, LT, MT, SK (within the context of national visas).

19 AT, BE, CY, CZ, DE, EE, EL, FR, FR, IE, LT, LU, SK.

20 AT, BE, DE, EE, ES, FR, IE, LT, LU, NL, SE. In France the spouse of the foreigner holding a "talent" residence permit is automatically issued with a residence permit labelled "talent famille" (family of a talent) which gives access to the French labour market.

21 AT, CY, CZ, DE, EE, EL, FR, FR, IE, LT, LU, NL, PL, SE, SK.

22 AT, BE (federal, BRU, FL), BG, CZ, DE, EE, ES, FI, FR, IE, LT, LU, MT, NL, PL, SE, SK.

23 AT, BE, DE, FR, IE.

24 See also EMN/OECD. Designing Migration Strategies, 2025. Available at: https://home-affairs.ec.europa.eu/system/files/2025-03/2024_EMN-OECD_inform_designing_migration_strategies.pdf, last accessed 14 May 2025.

25 AT, BG, CZ, EE, PL, SK.

26 BE, DE, ES.

27 BE, DE, ES.

28 AT, BE, CZ, CY, DE, EE, FI, FR, HR, HU, IE, MT, SE.

29 BG, EL, LT, LU, LV, NL, PL, SK

tests,³⁰ shortage occupation lists,³¹ quota systems³² and streamlined procedures,³³ to facilitate or speed up recruitment.

Twelve EMN Member Countries³⁴ and Serbia have a policy strategy and/or institutionalised/coordinated approaches for attracting foreign talent.³⁵ These encompass institutionalised approaches, labour shortage assessments and mechanisms for recognising foreign qualifications. The majority of responding EMN Member Countries³⁶ have also implemented policies to retain foreign talent, such as streamlining visa and permit processes, and extending permit validity as a strategy to ease the administrative process.

Key legal pathways for work have been refined across EMN Member Countries and Serbia and often address (highly) skilled workers.³⁷ EMN Member Countries, however, also

focus on different skill levels to meet immediate, medium-term and long-term labour market needs.³⁸

EMN Member Countries monitor and evaluate their labour migration policies by tracking permits, analysing labour market data and gathering stakeholder feedback.³⁹ Key lessons learned include the importance of effective data collection, streamlined legal frameworks, flexible permit systems, robust integration measures and ethical recruitment practices to address both short-term and long-term labour shortages.⁴⁰ Challenges include complex governance and coordination issues, lengthy legal procedures, integration difficulties (such as housing and language barriers), and persistent labour market obstacles affecting the recruitment, retention or recognition of foreign workers' qualifications.⁴¹



6. PRACTICES AND INITIATIVES FOR ATTRACTING AND RECRUITING FOREIGN TALENT

National practices and initiatives established by EMN Member Countries and Serbia to tackle labour shortages include initiatives to assist recruitment, sector-specific projects, and comprehensive strategies. In the majority of EMN Member Countries, the recruitment of third-country nationals is predominantly driven by employers and private recruitment agencies.⁴² However, EMN Member Countries and Serbia lead and influence employer and private recruitment-agency efforts to recruit third-country nationals through bilateral agreements with third countries,⁴³ quality-assurance measures⁴⁴ (which typically involve checks to ensure compliance with national employment laws governing the hiring of third-country nationals) and advertising initiatives (including online platforms⁴⁵ and job fairs),⁴⁶ while also implementing cost-sharing strategies⁴⁷ to mitigate recruitment agency fees. France, Germany, and Luxembourg reported significant government involvement in recruitment initiatives, such as through direct job placements. Additionally, targeted sector-specific projects and high-level strategies aim to attract workers.⁴⁸

There are significant regional disparities in attracting foreign talent in 14 reporting Countries, largely due to uneven economic development, wage disparities, sector concentration and varying levels of essential services – with major cities drawing the bulk of foreign workers, while rural areas lag behind.⁴⁹ To mitigate these imbalances, nine EMN Member Countries⁵⁰ have implemented initiatives such as regional projects, advisory services, government subsidies, targeted policy changes and regional shortage occupation lists, alongside strategic agreements with third countries, to enhance recruitment across the country.

Twelve EMN Member Countries engage to some extent with EU initiatives and instruments on labour migration developed since 2021.⁵¹ This includes engagement under the Talent Partnerships umbrella in a Team Europe approach as well as through the EU-funded Migration Partnership Facility, and related programmes to advance initiatives that address labour shortages through innovative recruitment, training and circular mobility schemes.

30 AT, BE, CY, CZ, DE – in specific cases only, EE, EL, ES, FI, FR, HR, HU, IE, LT, LU (in specific cases only), LV, MT, NL, PL, SK, and RS.

31 AT, BE, CZ, DE – in specific cases only, EE, ES, FI, FR, HR, HU, IE, LT, LU, MT, SK.

32 AT, CZ, EE, EL, HU, IE, LT, SK.

33 AT, BG, CZ, DE, EE, ES, FI, FR, HU, HR, IE, LT, LU, MT, NL, PL, SE, SK.

34 AT, BE, DE, EE, EL, ES, FI, FR, HU, IE, LU, MT (under finalisation), NL, PL, and RS.

35 See also EMN -OECD joint inform on Innovative strategies to attract foreign talents, February 2025, https://home-affairs.ec.europa.eu/news/new-joint-emn-oecd-inform-explores-innovative-strategies-attract-foreign-talent-eu-2025-02-27_en, last accessed 15 May 2025.

36 AT, BE, CY, DE, EE, EL, ES, FI, FR, HR, IE, LT, LU, LV, MT, NL, PL, SE.

37 AT, BE, CZ, DE, EE, ES, FI, FR, HR, IE, LT, LU, NL, PL, SE, SK.

38 AT, BG, CY, CZ, DE, HU, MT, LT, LV, PL, SE, SK.

39 AT, BE, BG, CZ, DE, EE, ES, FI, FR, HR, IE, LT, MT, NL, SE, SK.

40 AT, BE, CZ, DE, EE, FI, FR, HU, IE, LT, LU, MT, NL, PL, SE, SK.

41 AT, BE, BG, CY, CZ, DE, EE, ES, FI, FR, HU, IE, LT, LU, LV, MT, NL, PL, SE, SK.

42 BE, BG, CY, CZ, DE, EE, EL, ES, FI, FR, HU, IE, LT, LU, MT, NL, PL, SE, SK, and RS.

43 AT, FR, DE, ES, HR, IT, and RS.

44 AT, BG, DE, HR, IE, NL, PL, SE.

45 EMN Member Countries reporting this in the EMN inform on new and innovative ways to attract foreign talent: AT, DE, EE, FI, FR, IE, LU, LT, LV, NL, SI. Additional EMN Member Countries that reported this approach for this study: SE.

46 AT, DE, FI, LU.

47 DE, FI, FR, LV.

48 AT, BE, DE, EE, FI, IE, LU.

49 AT, BE, DE, EE, ES, FI, FR, HR, HU, IE, LT, LV, PL, SE.

50 AT, BE, DE, FI, FR, HR, IE, LT, SE.

51 BE, CZ, DE, EE, ES, FR, HR, IE, IT, LU, NL, SK.



7. CONCLUSIONS

Several conclusions can be drawn from the study.

■ **Despite the absence of a universally accepted definition, labour shortages continue to be a persistent and complex challenge.**

While the terminology used to describe labour shortages varies across EMN Member and Observer Countries, the EU labour market continued to experience significant tightness across the study period. Most EMN Member Countries have reported that vacancy rates have remained consistently higher than pre-COVID-19 levels, exacerbated by the economic recovery from the pandemic and specific demands within certain sectors.

■ **EMN Member and Observer Countries increasingly acknowledge labour migration as an important strategy for addressing persistent labour shortages, which have been intensified by demographic aging and the specific demands of various sectors.**

Between 2021 and 2023, EMN Member Countries issued an increasing number of residence permits for employment purposes, primarily to nationals from India, Brazil and the Philippines. This rise reflects a growing recognition of the need for foreign workers to fill critical sector gaps, which is also echoed in national public debates on the evolving and differing perspectives on the role of labour migration in addressing labour market shortages across most EMN Member Countries. Stakeholder groups vary in their views on labour migration management, with for instance discussions in some countries emphasising upskilling, reskilling, improving skills matching, and reactivating the local workforce as important strategies to mitigate these shortages.

■ **Labour migration policies are developed with a variety of stakeholders, with employers often taking a leading role in recruitment.**

Labour migration initiatives and policymaking involve a variety of public and private stakeholders. These include ministries responsible for economic, social, labour and migration issues, as well as local and regional authorities and social partners. Private sector stakeholders – which often take a leading role, especially in recruitment efforts – include employers and employer federations.

■ **Labour migration legal and policy frameworks and practical initiatives have undergone significant evolution, incorporating demand-driven, multi-tiered approaches at regional, national and EU levels to address labour shortages.**

Most EMN Member Countries have reported significant changes to their legal frameworks in the field of labour

migration, and have adopted evolving, demand-driven policy approaches and practical changes (such as digitalisation and fast-track procedures). Many EMN Member Countries are planning revisions of these frameworks.

■ **Evolving policy and legal frameworks address sector-specific needs amidst high vacancy rates.**

While the sectors with the highest vacancy rates vary, they predominantly include administrative and support services, accommodation and food services, professional and technical activities, construction, and wholesale and retail trade. These frequently align with the sectors most targeted by evolving policy and legal initiatives introduced by EMN Member Countries: agriculture/seasonal work, healthcare, construction, transport and tourism, with an emerging trend observed in the development of specialised procedures for healthcare workers.

■ **In most EMN Member and Observer Countries, labour migration recruitment is predominantly led by employers and private recruitment agencies, although some national authorities influence these efforts through regulatory and supportive measures.**

In most EMN Member and Observer Countries, private entities primarily lead recruitment efforts, with only France, Germany, and Luxembourg reporting initiatives driven by national authorities. However, EMN Member and Observer Countries implement a variety of other measures at national level to influence the recruitment of third-country nationals to address labour shortages. These measures include negotiating targeted agreements with third countries, implementing quality-assurance measures, advertising positions and providing practical guidelines.

■ **Challenges such as complex governance structures, lengthy legal processes and integration barriers remain.**

Challenges limiting the effectiveness of labour migration initiatives, include governance and coordination issues, particularly where federal structures and diverse stakeholders are involved in both practical implementation and the development of policy and legal frameworks. Further barriers arise from the design of legal migration pathways, which are often complex and lengthy, as well as challenges in integration and administration, such as language barriers, housing shortages, and negative public attitudes. Labour market conditions, exploitation risks, and difficulties in recognising foreign qualifications also affect the recruitment, retention, and fair treatment of migrant workers.



FOR MORE INFORMATION

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Cyprus www.moi.gov.cy/moi/crmd/emnncpc.nsf/home/home?opendocument

The Czech Republic www.emncz.eu/

Estonia www.emn.ee/

Finland emn.fi/en/

France www.immigration.interieur.gouv.fr/Europe-et-International/Le-reseau-europeen-des-migrations-REM3/Le-reseau-europeen-des-migrations-REM2

Germany www.bamf.de/EN/Themen/EMN/emn-node.html

Greece <https://migration.gov.gr/emn/>

Hungary www.emnhungary.hu/en

Ireland www.emn.ie/

Italy www.emnitalyncp.it/

Latvia www.emn.lv

Lithuania www.emn.lt/

Luxembourg emnluxembourg.uni.lu/

Malta emn.gov.mt/

The Netherlands www.emnnetherlands.nl/

Poland www.gov.pl/web/european-migration-network

Portugal rem.sef.pt/en/

Romania www.mai.gov.ro/

Spain www.emnspain.gob.es/en/home

The Slovak Republic www.emn.sk/en

Slovenia emnslovenia.si

Sweden www.emnsweden.se/

Norway www.udi.no/en/statistics-and-analysis/european-migration-network---norway#

Georgia migrationcommission.ge/

The Republic of Moldova bma.gov.md/en

Ukraine dmsu.gov.ua/en-home.html

Montenegro www.gov.me/mup

Armenia migration.am/?lang=en

Serbia kirs.gov.rs/eng

The Republic of North Macedonia <https://mvr.gov.mk/>

Albania