

Chapter 2

How attractive is the European Union to skilled migrants?

This chapter looks at where the European Union stands in the global competition for skills. It examines the EU's share of global migration stocks and flows relative to other OECD destinations. The chapter also looks at survey data on how EU Member States are perceived in relation to other potential destinations, considering how attractive they are and examining the opinions of residents, employers and potential migrants. The perception in EU Member States is that the immigration laws are not restrictive, but foreign talents are not sufficiently attracted to EU Member States. Overall, the European Union has to catch up with other OECD countries. Finally, there appears to be a large pool of talent interested in migrating to EU Member States that is much more extensive than the current flows. Relative to its size, however, the EU continues to play an undersized role in labour migration and in the growing migration of skilled individuals.

The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

Note by Turkey:

The information in this document with reference to “Cyprus” relates to the southern part of the Island. There is no single authority representing both Turkish and Greek Cypriot people on the Island. Turkey recognises the Turkish Republic of Northern Cyprus (TRNC). Until a lasting and equitable solution is found within the context of the United Nations, Turkey shall preserve its position concerning the “Cyprus issue”.

Note by all the European Union Member States of the OECD and the European Union:
The Republic of Cyprus is recognised by all members of the United Nations with the exception of Turkey. The information in this document relates to the area under the effective control of the Government of the Republic of Cyprus.

The position of the European Union in migration flows to OECD countries

At first glance, the European Union appears to host proportionately fewer international migrants than other OECD destination countries. In 2010-11, there were about 113 million foreign-born residents in the EU and other OECD countries. Of that number, 49 million lived in an EU Member State. Of those, 37% were born in another EU Member States, which left 31.2 million born outside the European Union (Figure 2.1), although some of these have naturalised and become EU citizens. The country with the highest number of non-EU-born residents was Germany (6.7 million), followed by the United Kingdom (5.2 million), France (5 million), Spain (3.7 million), and Italy (3.1 million).

The number of foreign-born residents in non-EU OECD countries was higher – 63 million in 2010-11. The United States accounted for two-thirds, or 43 million, making it by far the world's largest migrant destination. Canada was home to 7.1 million migrants and Australia 5.3 million. Among other OECD countries, only Israel, Japan, and New Zealand had more than a million migrants in 2010-11. In relative terms, the share of the foreign-born in the total population was particularly high in New Zealand at 30%, Australia at 26% and Canada with 22%. As for the United States, the proportion was 14%.

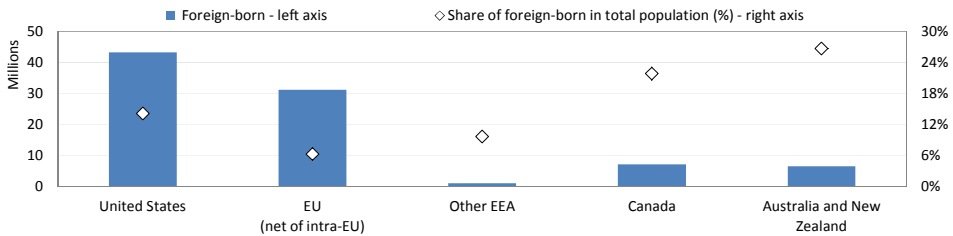
In the European Union, the share of non-EU-born migrants was just 6% of the total population. Even if only the pre-2004 EU Member States (the EU15) are considered, the share of migrants born outside the European Union was 8% – still below levels in other OECD destination countries. Among post-2004 EU members (EU+12), the non-EU born accounted for just 2%.

The picture changes, however, when it comes to immigrants as a share of the working-age or older population (at least 15 years old). In 2010, the total stock of migrants in that age group in the EU27 countries and OECD countries¹ was almost 80 million – 8.4% of the total population. Of those, the EU27 had a migrant population of 30.2 million, with the EU15 countries accounting for 94%. The main destination countries – Germany, the United Kingdom, France, Spain and Italy – hosted three out of four migrants. OECD destination countries outside Europe had an immigrant population of 48.6 million, the vast majority of whom (91%) lived in the United States (70.7%), Canada (11.7%) and Australia (8.6%). Non-EU European countries had an immigrant population of almost 1.1 million, 72% of them in

Switzerland. The immigration rate to the EU27 was, at 7.5%, lower than that to other OECD countries, which include populous, low-migration countries such as Mexico and Turkey.

Figure 2.1. The European Union has fewer foreign-born residents than the United States and a smaller share than other OECD countries

Number of foreign-born (all ages) and share of the foreign-born in total populations in 2010-11, excluding intra-EU mobility



Source: OECD Database on Immigrants in OECD Countries (DIOC) 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

When individual destinations are compared, the immigration rate, or foreign-born share of the population of 15 and older, is lower in almost all EU Member States than in the United States, Canada, Australia, New Zealand and Switzerland (Figure 2.2). There are three exceptions among the EU+12 countries. They are Estonia and Latvia, which have a large, though aging, Russian-born population, and Slovenia, where many residents were born in other parts of the former Yugoslavia.

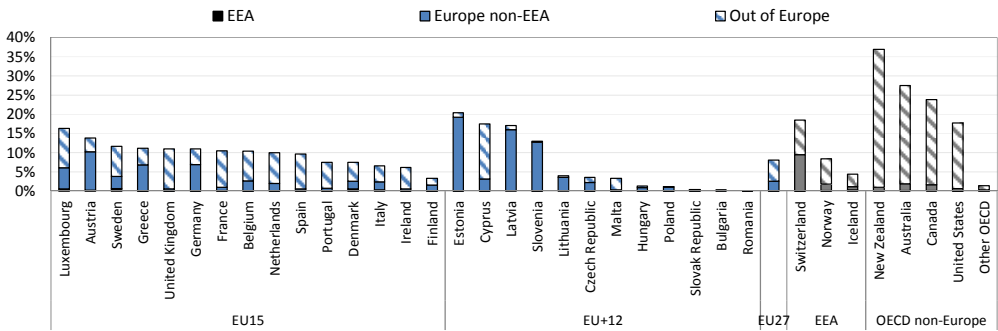
The attractiveness of EU Member States to migrants from outside Europe varies with country of origin. Countries like Spain, France and the United Kingdom appeal to largely non-European migrants, while Austria and Germany have high shares of migrants from European countries that include Russia, southeast Europe and Turkey.

When it comes to regions of origin, the EU appears relatively more attractive to migrants from Africa (Table 2.1). More than one-quarter of migrants living in the EU27 come from Africa, for reasons attributable to geographical proximity and colonial and cultural ties. Morocco and Algeria alone account for almost 53% of African-born in EU Member States. While another quarter come from Asian countries, European nationals from non-EU/EEA countries make up the third-largest group of immigrants in the EU27. Turkey is not a major country of origin for other OECD destinations, but accounts for almost 8% of migrants in the EU27. Non-OECD Asian countries and South and Central America and

the Caribbean (SCAC) also contribute large numbers of migrants, but proportionately fewer than in other OECD destinations. Indeed, more than two-thirds of the migrant stock in non-EU OECD countries originate from SCAC (40.8%) and Asia (29.8%). The SCAC countries’ high share is attributable to Mexican migration to the United States, where it accounts for over one-quarter (28.2%) of the total migrant stock. As for high proportions of Asian immigrants, they may be ascribed to the very high proportions of Asian migrants in Canada and Australia.

Figure 2.2. The share of immigrants in EU Member States is lower than in competing OECD countries, 2010

Immigration rates in the EU27 and other OECD countries, by country of destination and region of origin, aged 15+



Source: OECD Database on Immigrants in OECD Countries (DIOC) 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

Table 2.1. The European Union hosts more migrants from neighbouring European countries than other OECD destinations, and fewer migrants from Asia, 2010

Immigrant population aged 15+ in EU27 and other OECD countries by detailed origin

Region or country of destination	From Africa	From non-OECD Asia	From Europe Non-EEA (excl. Turkey)	From South and Central America non-OECD	From Turkey	From North America	From Mexico	From other regions	Total
EU15	27.6	25	19.5	13.2	8.2	2.3	0.3	3.9	100.0
EU+12	1.4	13.4	81.3	0.5	0.6	1.6	0.1	1.1	100.0
EU27	26.1	24.4	22.9	12.5	7.8	2.3	0.3	3.7	100.0
Other EEA	14.3	25	35.2	8.9	7	4.9	0.6	4.1	100.0
United States	4.1	28.2	3.2	28.5	0.3	2.4	30.6	2.7	100.0
Canada	9.4	60.1	5.9	14	0.5	5.4	1.6	3.1	100.0
Australia	9.5	56.6	5.5	2.4	1	3.2	0.1	21.7	100.0
Other OECD	9	44.6	18.1	12.7	0.6	8.8	0.2	6	100.0
Total	13.3	30.6	12.1	19.4	3.3	3	14.2	4.1	100.0

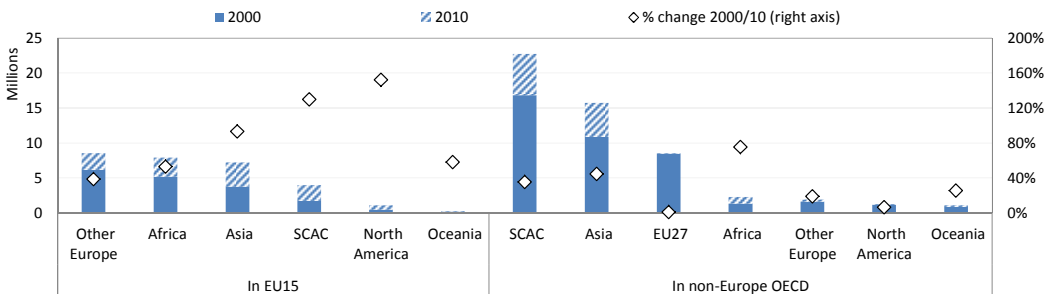
Source: OECD Database on Immigrants in OECD Countries (DIOC) 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

The number of migrants in the EU grew faster than in other OECD destinations in the 2000s

While the EU hosts a smaller share of migrants than other OECD destinations, it has been catching up thanks to its robust immigration rate. During the 2000s, the EU increased its stock of foreign-born residents faster than other OECD destinations (Figure 2.3). About one-third of the increase could be ascribed to citizens born in the European Union.² And even discounting that mobility, the migrant stock in the EU15 still rose by 66%, or fully 11.6 million, over the decade. Thirty percent of the rise stemmed from a higher inflow of migrants from Asia (which doubled, adding 3.5 million individuals), 24% from African migration (which rose by 53%, or 2.7 million) and 19% from higher SCAC immigration, which also doubled, adding 2.3 million to foreign-born stocks (Figure 2.3). Conversely, nearly 90% of the increase in the migrant stock in non-European OECD can be attributed to migration from the SCAC countries (up 5.9 million and 35.2%) and Asia (up 4.8 million and 44.3%). The highest relative climb in immigration to other OECD countries came from Africa, with numbers increasing by 75.3%, albeit from a much lower level.

Figure 2.3. Over the 2000s, increases in the migrant population were more significant in the EU15 than in other OECD countries

Change in immigrant population aged 15+ in EU15 and non-European OECD countries (in millions and percentage change), by country of origin, 2000-10



Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

Despite its younger migrant population, the European Union lags behind in education and employment growth

Across the OECD, migrant stocks evolved over the 2000s, though at different paces in EU and non-EU OECD destination countries. The following analysis focuses on the EU15, for which complete and comparable data are available for both 2000 and 2010. These countries also host most of the immigrant population in the European Union. Migrants residing in the EU15 were generally more poorly educated than those living in other OECD destinations, although the share of the highly educated rose over the decade (Table 2.2). The European Union has a younger migrant population, with a smaller share over the age of 65. Indeed, among those older than 15, the share of migrants aged 65 and over fell from 11% to 10% in the EU15, while it rose from 13% to 15% in other OECD countries. Not only did migration grow faster in the EU than in non-EU countries (61% compared with 26%), but migrants to the European Union gave a greater boost to the working-age population over the decade. The share of recent migrants among all migrants increased in the EU15 and fell in other OECD countries.

The share of 25-to-64 year-old migrants with low levels of educational attainment in the European Union fell by 14%, which was nevertheless less than in other OECD countries where the decline was 24%. These patterns of change point to the fact that cohorts of low-educated migrants in other OECD countries – many of whom migrated decades ago – were older. The share of highly educated migrants in both EU and non-EU countries climbed by about 25% over the decade, which suggests that non-EU OECD countries maintained and even reinforced their strong lead in that respect.

The share of migrants in employment rose in the 2000s, but more steeply in non-EU countries and from a higher level. The increase was due to multiple factors that included a higher share of labour migrants across countries, a higher degree of selectivity in non-EU countries, and a greater propensity among women and other family migrants to be employed. Nonetheless, the employment rates of immigrants in the EU15 remained persistently below those in other OECD countries, suggesting that the difference is structural and not cyclical.

Table 2.2. The European Union still lags behind other OECD destination countries in migrant education levels and employment, 2000 and 2010

Main characteristics of the immigrant population aged 15 and above by year and destination, EU15 and other OECD destinations

	2000		2010		Change		
	EU15	Other OECD	EU15	Other OECD	EU15	Other OECD	
Immigrant population 15+ (thousands)	19 207	45 503	30 981	57 219	61%	26%	
Women	50%	51%	51%	51%	2%	1%	
Duration of stay	<5	16%	19%	18%	13%	11%	-34%
	5-10	19%	15%	20%	14%	5%	-11%
	>10	65%	66%	63%	74%	-4%	12%
Education	Low	48%	36%	41%	27%	-14%	-24%
	Middle	32%	36%	33%	37%	4%	5%
	High	20%	29%	25%	36%	25%	24%
Labour force status	Employed	51%	56%	58%	68%	13%	21%
	Inactive	39%	39%	30%	26%	-23%	-34%

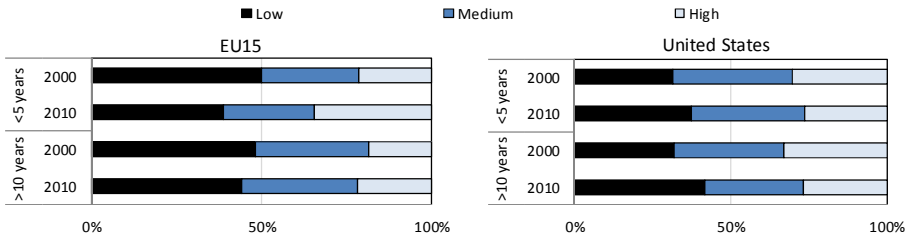
Note: Education shares, employment and inactivity rates are computed for the population aged 15-64. Only OECD destinations are included as they appear in earlier DIOC database (2000).

Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

Between 2000 and 2010, the EU closed the gap on the United States in shares of educated migrants (Figure 2.4). While only 21% of recent migrants to EU Member States were highly educated at the beginning of the decade, compared with 27% in the United States, the figures were 34% in the European Union and 33% in the United States by the end of the decade. A larger share of migrants in the United States than in the European Union have medium-education levels, including among recent migrants (36% compared with 27%). The longer-term resident population in the EU (those living there for over ten years) still reflected the lower educational composition of past migration, with 44% of long-term residents in 2010 poorly educated. The figure was higher than in the United States (41%), but as the incoming cohorts age, overall figures will converge.

Figure 2.4. The highly educated account for a higher share of recent migrants in the European Union than in the United States, 2010

Distribution of education levels among immigrant populations aged 15+ in the EU15 and the United States, by the duration of stay, 2000 and 2010



Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

Although the European Union is attractive, it should appeal to more highly educated migrants

Overall, migration to the EU27 is more heterogeneous than to other OECD destinations. The EU27 and the United States host almost three-quarters of all resident migrants. The two regions receive a comparable number of migrants, who account for 11% of the total population in the EU27 and 17% in the United States. In the EU27, however, they come from a wider diversity of countries, with the five countries of origin that account for the most migrants making up only 25% of the total stock. The figure is 40% in the United States, where one country, Mexico, represents more than 27% of the total. In Canada, the top five countries of origin comprise 36% of the total, and in Australia and New Zealand 43%. Altogether, the EU boasts a much broader network of ties with different origin countries and far more migration channels than any single OECD country outside the European Union.

The top five non-EU countries that supply the most migrants to the EU27 – China, India, Morocco, Philippines and Viet Nam – all appear at least twice in the top ten countries of origin per destination region. These countries afford insight into where the EU fits into flows from the main countries of origin (Table 2.3).

India, where most migrants were born, had a smaller share of emigrants in the European Union in 2010 (27.9%) than in 2000. While the number of Indians in the European Union increased in the 2000s, the EU's share of Indian expatriates fell by 3.8%. In 2010, a much larger

share lived in the United States (46.3%) and, despite the smaller population, in Canada and Australia (22.4%). Furthermore, the EU27 was home to just 20.5% of highly educated Indians, compared with 57% in the United States.

As for China, which supplies the second-highest number of migrants, the EU was home to 18.9% of them, almost all of whom lived in the EU15. The number of Chinese in the EU15 increased by 62% over the decade and their share of the migrant population by 90% over the decade – from 9.8% of the total in 2000 to 18.4% in 2010. The European Union attracted proportionally fewer well educated Chinese migrants than other OECD destinations – 16.9% of all Chinese migrants, compared with 42.5% in the United States and 40% in Australia and Canada.

Table 2.3. The European Union has increased its share of migrants from China and the Philippines, but receives fewer highly educated migrants than other OECD destinations

How the distribution of immigrant populations aged 15+ evolved in the main migrant host regions by country of origin, 2000-10

	Total (2010)				High educated (2010)				EU15 (total)		
	Total	Share of total (%)			Total	Share of total (%)			Total	Share	
	(millions)	EU27	United States	Australia, Canada	(millions)	EU27	United States	Australia, Canada	Change 2000-2010 (%)	2010 (%)	Change 2000-2010 (%)
India	3 539	28%	46%	22%	2 217	21%	57%	22%	81%	28%	-4%
China	3 349	19%	37%	30%	1 574	17%	43%	40%	62%	18%	88%
Philippines	2 869	13%	60%	20%	1 508	9%	65%	26%	49%	13%	75%
Morocco	2 425	89%	3%	2%	396	83%	7%	9%	61%	89%	-6%
Viet Nam	1 915	18%	61%	18%	545	15%	65%	19%	26%	15%	-1%

Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

The Philippines has a similar distribution of emigrants among OECD countries as China. While the European Union accounts for only a small share of all Philippine migrants (13.4%), it saw a large rise in intake (48.6%) in the first decade of the century, with its share of the total Philippines emigrant population rising by 75%. The European Union does not attract highly educated Filipinos, however, who are overwhelmingly to be found in the United States, Canada and Australia.

Morocco has traditionally seen most of its emigrants head for EU Member States: 89.2% of Moroccan-born residents in the OECD and EU27 countries were living in the latter in 2010. The European Union has become less attractive, however, and its share of Moroccan-born inhabitants slipped by 5.9% over the decade, even as the number of

Moroccan-born increased by 61.1%. Moroccans going to non-EU destinations are much more likely to be highly educated. The United States, Canada and Australia host less than 5% of Moroccan born migrants, but are home to 16% of those who are highly educated.

The European Union hosts a smaller share of Vietnamese-born migrants of whom the highly educated, like those of other nationalities, appear less attracted to the EU than other OECD destinations.

The European Union receives more migrant flows than any single OECD destination

The European Union has a lower migrant stock than the United States and migrants form a smaller share of its population. Yet inflows are higher than to any OECD destination in absolute terms and are comparable in relative terms to the United States' intake – about 0.3% of the population. In 2013, 1.4 million migrants came from outside the Union to the EU (Figure 2.5) – a number that was on a scale comparable to intra-EU mobility that year. The number of foreigners who arrived in a non-EU OECD country stood at 2.5 million in 2013. More than one in three (36%) international migrants who moved to Europe or other OECD countries chose the European Union in 2013. In absolute numbers, Germany, Spain, and Italy were the chief recipients of non-European migration in 2013. Germany alone welcomed about 380 000, while Spain and Italy took in 200 000 each.

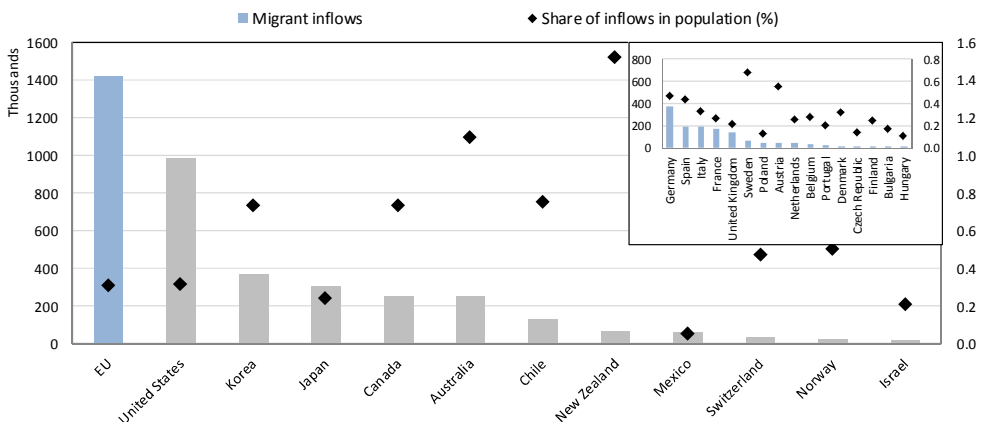
In relative terms, however, non-EU migrant flows account for a small share of the total population in most EU Member States at 0.4%. There are some exceptions, though, and in 2013 a few EU Member States took in non-EU flows that were high in proportion to their populations: 0.7% in Luxembourg and Sweden, and 0.6% in Austria. That being said, the relative magnitude of migrant flows was still greater in a number of other OECD destinations than in Europe – particularly in New Zealand (1.5%), Australia (1.1%), Chile (0.8%), Canada (0.7%), and Korea (0.7%). Inflows relative to population in all those countries exceeded even the top EU destinations.

Permanent-type migration to OECD countries can be tracked over time by comparing permanent residence permits in non-European OECD countries with renewable permits that lead to permanent residence in Europe (Lemaitre et al., 2007). Numbers are more volatile over time in EU Member States than in non-EU OECD countries (Figure 2.6). Indeed, the issuance of permanent-residence permits in non-EU OECD

countries remains fairly stable over time, since the main issuing countries use caps (e.g. the United States) or targets (Canada, Australia and New Zealand) to govern permanent inflows. Targets apply to most categories of migration: labour migrants, family members of non-citizens, and resettled refugees. The EU OECD countries, on the other hand, are more responsive to demand. While a number of EU Member States cap their labour migrant intakes, the caps themselves vary in response to changing economic circumstances and political priorities. No numerical limits apply to family migrants. The EU's responsiveness means that policies can be alternately open or restrictive. It was restrictive in the wake of the 2008 economic and financial downturn, with permanent-type migration to the European Union falling some 30% from its 2007 pre-crisis peak to about 1 million in 2013. In non-EU OECD countries, a spike in 2006 due to the absorption of the migrant backlog in the United States was the only variation in a decade of stability.

Figure 2.5. The European Union as a whole receives more migrants than other OECD destinations, but not relative to its population, 2013

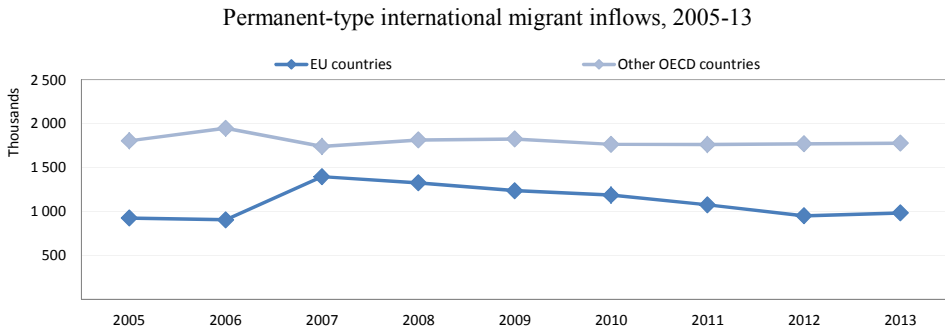
International migrant inflows and inflows as a share of total population



Note: Greece, Croatia, Ireland, and Romania are not included.

Source: OECD International Migration Database, “Inflows of foreign population by nationality”, <https://stats.oecd.org/Index.aspx?DataSetCode=MIG>.

Figure 2.6. There is more annual variation in permanent-type migration to EU OECD countries than to other OECD destinations



Source: OECD International Migration Database (2015).

Volatility in the EU's migrant intake springs largely from work-related flows. They have been extremely variable in the EU over the past decade, reflecting both shifting demand and policy changes. Work-related permanent-type inflows to EU OECD countries have been higher than those in non-EU OECD countries, even though they fell between 2010 and 2013 (Table 2.4). For the EU OECD countries for which harmonised data is available, work-related permanent-type migration fell from 430 000 in 2010 to 291 000 in 2013. In 2013, the figure for non-EU OECD countries was 261 000. The fall reflects the sharp decline in work-related permits in Italy and, to a lesser extent in Spain and the United Kingdom. Elsewhere in the European Union, work permit issuances have stayed in the same broad range from one year to the next. Another reason for variations in EU admissions are permits issued for other, often exceptional purposes – permits granted as part of a continuous regularisation mechanism or similar administrative procedures, residence granted on the basis of ethnicity (descendants of a national group), and permits issued under extraordinary regularisation.

The same trend is evident in Eurostat data on permits for remunerated employment, which afford a similar view of labour migration. In 2014, the number of initial work permits issued in the European Union was 223 000, less than half its level in 2008 (Table 2.5). Italy and the United Kingdom issued the largest number of work permits in the European Union up to 2012.³ Several factors are at play in the fall in permits issued. The economic circumstances – a slack labour market – slowed demand in a number of Member States (Ireland, Portugal, Spain, and the Czech Republic). Italy largely closed down its available work

permits. As for the United Kingdom, in 2010 it committed to reducing net migration, focusing particularly on tightening up the labour migration channel. The bulk of EU Member States restrict entry to the most qualified workers through the use of thresholds (see Chapter 1). Inflows of qualified workers were less subject to variation.

Table 2.4. Work is the category which explains much of the variation in permanent-type flows to EU OECD countries

Permanent type permits issued in EU and non-EU OECD countries, 2010-13, in thousands

Category	EU-OECD countries				Other OECD countries			
	2010	2011	2012	2013	2010	2011	2012	2013
Work	431.1	387.6	302.2	290.8	242.1	236.0	246.8	261.2
Accompanying family of workers	61.2	52.4	44.1	49.8	271.4	238.4	251.0	251.6
Family	463.5	452.2	429.5	428.2	918.7	906.9	915.5	910.9
Humanitarian	68.2	81.1	83.9	124.0	199.7	233.0	209.9	186.2
Other	127.3	80.5	60.8	66.0	131.9	147.1	147.5	167.9
Total	1 151.3	1 053.9	920.5	958.8	1 763.9	1 761.5	1 770.7	1 777.8

Note: EU-OECD countries included are the EU15 (except Greece) and the Czech Republic.

Source: OECD International Migration Database (2015).

Table 2.5. A few EU Member States consistently issue the most longer-term work permits

Work permits (12 months or over) in the main permit-issuing EU Member States, 2008-14

Country	2008	2009	2010	2011	2012	2013	2014
United Kingdom	139.7	116.7	121.4	108.2	60.4	54.4	59.7
Spain	76.4	96.3	69.7	81.0	58.8	45.1	38.2
Italy	157.5	121.7	196.8	63.6	30.6	50.7	24.7
France	17.3	17.6	15.1	14.4	12.4	14.8	15.6
Germany	17.8	4.0	4.6	5.7	10.2	11.4	12.9
Czech Republic	7.3	1.6	9.1	2.4	15.1	15.6	8.8
Denmark	7.4	11.1	12.2	7.4	6.8	8.3	8.2
Sweden	4.5	6.9	6.9	9.9	9.2	7.8	7.8
Portugal	24.7	17.7	10.7	7.0	5.7	6.1	6.1
Lithuania	2.3	0.9	0.4	0.8	1.4	2.1	4.3
Other	57.0	35.1	20.9	25.4	18.8	21.6	36.6
Total	511.9	429.5	467.6	325.7	229.3	237.9	223.1

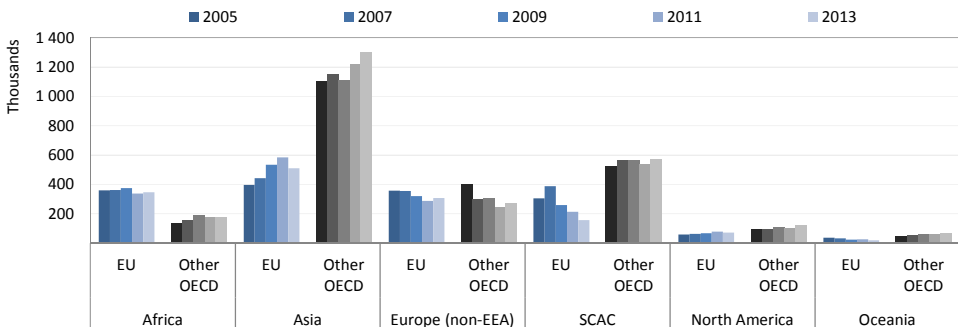
Source: Eurostat, “First permits issued for remunerated activities by reason, length of validity and citizenship”, http://ec.europa.eu/eurostat/web/products-datasets/-/migr_resoc.

Inflows from Africa are more likely to head for the European Union than other OECD destinations

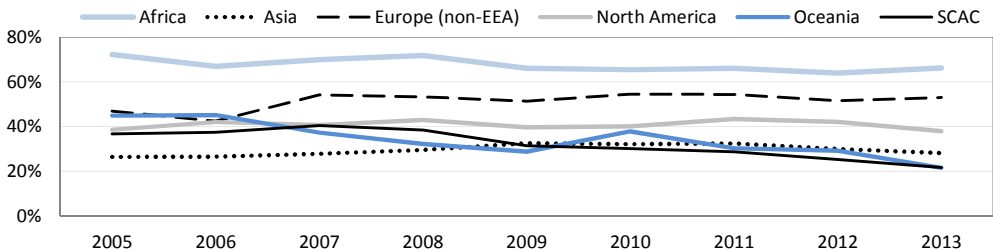
The regions that have supplied the most migrants to EU OECD countries in recent years have been Asia (Figure 2.7, Panel A), followed by Africa and non-EU Europe. Outflows from Africa have been steady, with more migrants making for the EU Member States than the non-EU OECD area. The number of immigrants from Asia to the EU rose steadily from 2005 to 2011 before slipping back in 2013, with flows lower those to other OECD countries. Migration from South and Central America and the Caribbean rose in the late 2000s, but there has since been a decline in flows to EU Member States – primarily in southern Europe.

Figure 2.7. The regions of origin of migrants to the European Union are different from those to other OECD countries

Panel A. Immigration to the EU and other OECD destinations, by region of origin, 2005-13



Panel B. Share of migrants to OECD destinations that go to the EU, by region of origin, 2005-13



Source: OECD International Migration Database, “Inflows of foreign population by nationality”, <https://stats.oecd.org/Index.aspx?DataSetCode=MIG>.

Most African migrants to the OECD head for the European Union (Figure 2.7, Panel B), the destination for two-thirds of them in 2013. Half of the migrants from neighbouring European countries – Southeast Europe, Turkey, Russia and Ukraine, primarily – went to the European Union. Of those who emigrated to other OECD destinations, about half headed for EFTA countries. The European Union attracts less than one-third of migrants from Asia – who comprise the largest group of international migrants – and the share has declined in recent years. Flows from OECD countries to North America and Oceania are generally inter-regional flows – towards each other – rather than to EU destinations.

Patterns in regions of origin are mirrored in the destinations which migrants from the main countries of origin in each region choose. In African outflows in 2013, Morocco saw 92.1% of its migrants head for EU OECD countries, Algeria 86.8% and Nigeria 55.1%. The EU was the main destination for migrants from Turkey (83.1%), Ukraine (78.2%) and the Russian Federation (75.8%). Only 22.9% of migrants from China, which accounts for one in ten migrants to OECD countries, took up residence in the European Union in 2013. As for India, the figure was higher – 34.3% – while for the Philippines it was just 13.6%.

Labour migrants to the European Union come from all over the world

The European Union is not dependent on any single nationality for its work permits (Table 2.6). The top 12 nationalities of recipients of longer-term work permits account for little more than half the total inflow, and the leading nationality, India, comprises just over one in ten of the total. The main non-OECD countries of origin of holders of EU work permits in the European Union valid for one year or more have been India, China, Morocco, the Russian Federation, and the Philippines. All nationalities have seen declines, but particularly those who had arrived for employment in Southern European countries, and those from Morocco, Brazil, the Philippines and Ukraine.

Table 2.6. Labour migration to the European Union is not dominated by any single country

Work permits (12 months or over) in the main issuing EU Member States, 2008-14

Country of origin	2008	2009	2010	2011	2012	2013	2014
India	46.5	43.1	50.6	38.7	21.7	24.2	25.2
United States	29.5	24.9	28.9	27.6	20.6	20.8	23.5
China	29.6	32.7	26.5	17.3	14.0	13.8	14.4
Ukraine	33.5	28.7	40.4	13.6	16.2	20.6	14.1
Morocco	38.0	23.6	28.5	17.0	10.0	12.3	9.1
Australia	22.0	16.7	16.9	15.5	9.1	8.3	9.1
Philippines	19.5	17.8	19.8	15.8	8.6	6.5	6.5
Pakistan	5.3	8.8	11.2	7.2	4.7	7.1	6.5
Canada	8.5	6.9	7.5	7.1	5.1	5.3	5.9
Brazil	24.4	20.2	14.3	10.0	7.4	6.0	5.8
Japan	6.2	5.4	5.2	5.6	4.4	4.2	5.3
Bangladesh	11.2	6.1	11.3	5.9	3.2	7.4	4.2
Other	237.7	194.7	206.4	144.3	104.2	101.3	93.7
Total	511.9	429.5	467.6	325.7	229.3	237.9	223.1

Source: Eurostat, “First permits issued for remunerated activities by reason, length of validity and citizenship”, http://ec.europa.eu/eurostat/web/products-datasets/-/migr_resoc.

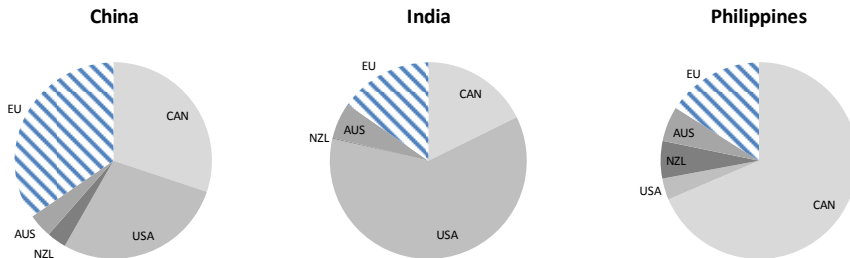
The heterogeneous origins of EU migrants are in sharp contrast to other OECD countries, where labour migration tends to be dominated by a few, mostly Asian, countries. In the United States, for example, India, China and the Philippines account for about half of all permanent employment-related visas. In Canada, Australia and New Zealand, too, the bulk of employment migration is from precisely those three Asian countries. The same is true for temporary skilled workers. In the United States, Indians make up between one-half and two-thirds of the annual intake of H-1B Visa holders (temporary skilled workers), and Chinese migrants around 10%. In Australia, China and India alone comprise between one-fourth and one-third of temporary skilled work permits.

The European Union does, however, take in a share of economic migrants from the countries which are at the top of the origin list for labour migration to other OECD countries. Figure 2.8 compares work permits in the European Union with H-1B Visas for temporary skilled workers in the United States, temporary skilled workers in Australia, Essential Skills Visas in New Zealand, and temporary migration for employment in Canada. The comparison does not take into account the skills make-up of migration to the EU and, indeed, many of the work permits in the EU were issued for employment in less skilled occupations. However, the available statistics do not allow for a more detailed analysis. The comparison reveals that, in 2012, the latest year

for which detailed comparisons across destinations are available, the EU Member States granted work permits to more Chinese migrants than in the United States' intake of temporary skilled workers or Canada's intake of temporary workers. The number of Indians admitted to EU Member States with work permits was smaller than the number who received H-1B Visas or who entered Canada as temporary economic migrants. More nationals from the Philippines received work permits in the European Union than in the United States, New Zealand or Australia, although far fewer than in Canada (largely due to Canada's live-in caretaker programme). However, in proportion to the size of the European Union and the large number of skilled labour migrants from China, India and the Philippines, the EU appears to be lagging behind when it comes to attracting skilled labour migrants.⁴

Figure 2.8. The European Union takes in a share of the flow of workers who constitute the main groups of labour migrants in other OECD countries

Labour and economic migration to selected OECD countries and the EU, by country of origin, share in 2012



Note: The data are for the year 2012, fiscal year 2012/13 (Australia) or fiscal year 2011/12 (New Zealand). The permits or visas considered are: New Zealand: Essential Skills and Skilled Migrants; United States: H-1-B Visas; Australia: Subclass 457, visas granted; Canada: the Temporary Foreign Worker Program (TFWP) and the International Mobility Program (IMP); Europe: Eurostat permits for remunerated activity.

Migrants to the EU are younger and less well educated than those in other OECD destinations

The European Union attracts a different profile of migrant relative from other OECD destinations, especially when defined by educational attainment and labour status (Table 2.7). While the share of women is similar in EU and non-EU OECD destinations – slightly more than 51% – this proportion is greater in the EU12 at 55%. Migrants to the

EU27 are slightly younger, while 65-year-olds account for 11.3%, less than the non-European OECD countries' 14.7%. In the EU15, migrants are even younger, with less than 10% of over-65s, most of whom live in the long-standing migration destinations of Germany, France and the United Kingdom. Other EU Member States host just one-third of the EU's older migrants.

As noted above, the migrant population in the European Union has been increasing more rapidly than in other destination countries. More EU migrants are therefore recent arrivals. The shares of immigrants resident in the European Union for less than five years and between five and ten years are 17.6% and 19%, respectively, against 12.5% and 13.7% in OECD countries outside Europe.

Table 2.7. Migrants in the European Union are younger and more likely to have arrived recently

Main characteristics of immigrant population aged 15+ in EU27 and other OECD countries, by destination, 2010

Region of destination	Immigrant population aged 15+ (thousands)	Women	Age		Education			Duration of stay			Labour force status	
			15-24	65+	Low	Medium	High	<5	5-10	>10	Employed	Inactive
EU15	30 981.5	51%	13%	10%	41%	33%	25%	18%	20%	63%	58%	30%
EU+12	1 751.0	55%	7%	35%	19%	53%	29%	12%	7%	81%	64%	27%
EU27	32 732.5	51%	12%	11%	41%	34%	25%	18%	19%	63%	58%	30%
Europe non-EU	13 900.5	51%	12%	13%	31%	36%	33%	17%	12%	71%	71%	23%
Other OECD	57 219.8	51%	12%	15%	27%	37%	36%	13%	14%	74%	68%	26%
Total	117 028.9	52%	12%	14%	32%	37%	32%	16%	15%	69%	65%	27%

Note: Education shares, employment and inactivity rates are computed for the population aged 15-to-64 years old.

Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

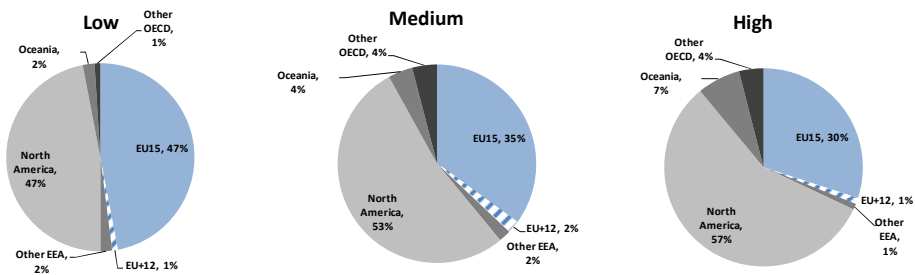
Migrants to the European Union are not only younger, they are generally less well educated, too. Indeed, a much larger share of the migrants to EU Member States than to OECD countries outside Europe have low levels of educational attainment – the proportions are 40% and 27%, respectively (Table 2.7). As the share of medium-educated (37%) migrants is similar in both destination regions, the share of highly educated immigrants is much higher in non-Europe OECD (36%) than in the European Union (25%).

If analysis considers migrant destinations, the European Union appears decidedly less appealing to highly educated third-country

migrants. Figure 2.9 depicts three groups aged 25-to-64 years old in EU and OECD countries according to level of education. Each group is about the same size, roughly 20 million. Overall, 39% reside in the EU. Thus, any figure over 39% is an over-representation of that group. The European Union hosts 33% of the total stock of highly educated third-country migrants (most in the EU15) and North America 57%. Furthermore, the majority of low-educated migrants live in Europe (56%), mostly in the EU15 (47%). Figures for the medium-educated are closer to the expected distribution, although the EU still receives proportionately fewer than other OECD destinations.

Figure 2.9. The higher the education level, the less likely migrants are to live in the European Union, 2010

Distribution of low, medium and high-educated non-EU-origin immigrant populations, aged 25-64, by destination



Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

Regardless of region of origin, the same pattern holds true, with the EU hosting relatively fewer highly educated migrants (Table 2.8). Higher proportions of African migrants (almost one-half) in North America and Oceania than in the EU15 (23%) also tend to be highly educated. About half of Asian migrants in other OECD destinations are highly educated, compared with less than one-third in the European Union. SCAC migrants are a notable exception. On average, they are less well educated in North America than in the EU15, a consequence of looser selectivity in the United States, where part of the large SCAC-born population entered outside selective legal channels.

Table 2.8. Among Asian and African migrants, a much smaller share are highly educated in the European Union than in other OECD destinations, 2010

Share of highly educated non-EU immigrant populations aged 25-64, by destination and origin

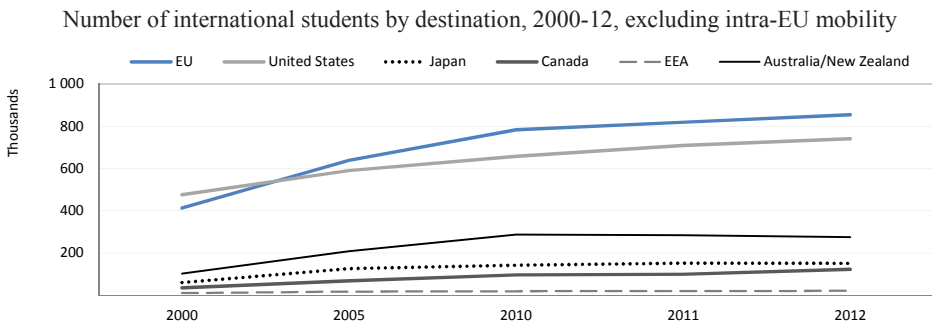
Region of Destination	Region of origin					
	Europe Non EU	North America	SCAC	Asia	Oceania	Africa
EU15	16%	48%	25%	32%	52%	23%
EU+12	24%	42%	44%	30%	27%	44%
North America	50%	50%	16%	52%	39%	49%
Oceania	29%	60%	46%	49%	27%	47%
Total	25%	48%	17%	39%	32%	28%

Source: OECD Database on Immigrants in OECD Countries (DIOC) 2000/01 and 2010/11, <http://www.oecd.org/els/mig/dioc.htm>.

The European Union is the single leading destination for international students

The EU is attractive to international students, and growing more so over time. Taken as a whole, it has overtaken the United States as the destination of choice (Figure 2.10). In 2012, there were 855 000 third-country national students in EU Member States. Almost one in three, however, was studying in the United Kingdom. France with 200 000 and Germany with 128 000 were the next largest destinations. Of the 1.4 million international students in other OECD countries, most were hosted by the United States. The European Union more than doubled its international student population over the 12 years between 2000 and 2012, outstripped only by Australia and New Zealand, where enrolment tripled.

Figure 2.10. The European Union has overtaken the United States as the prime destination for international students



Source: UNESCO Institute for Statistics, “Global Flow of Tertiary-Level Students”, interactive webpage, <http://www.uis.unesco.org/EDUCATION/Pages/international-student-flow-viz.aspx>.

The increase by 107% in the number of non-EU students in the EU between 2000 and 2012 was driven by a number of Member States. Figures more than doubled in the United Kingdom, France, and Spain. In Italy, the increase was six-fold. After 2005, however, the number of students declined in Germany. In the EU+12 members, enrolments started from a low baseline, but the relative increase was even higher than in the EU15 countries. The Czech Republic saw a 700% increase over the decade to 2012, and Lithuania, Poland, and Estonia also saw the number of foreign-born students rise remarkably between 2000 and 2012. Similar increases were not seen in other OECD countries.

Most students in both the EU and other OECD countries originate from Asia. By far the largest number of international students in OECD and EU Member States come from China – 590 000 in 2012, up from just 110 000 in 2000. The share and absolute numbers of Chinese students in the EU have grown in concert. In 2000, just 17% of Chinese students were in EU Member States. By 2012, the figure was close to 25%. That being said, the European Union has not seen its share of Chinese students increase since the mid-2000s. Indeed there has been a fall.

India supplied the second largest group of international students in 2012, with 170 000. The EU saw its share of the market for the Indian students increase from 13% in 2000 to about 25% in 2012. Most studied in the United Kingdom and Ireland. Korea is the third largest non-EU country of origin for international students, of which the European Union has a small market share of about 10%. The European Union was the destination of 43% of international students from Viet Nam in 2000, though that number had fallen to about 30% by 2012. Europe continues to attract the overwhelming majority of students from the Maghreb and a clear majority of those from neighbouring countries such as the Russian Federation, Turkey, and Ukraine. The EU's market share of Morocco and Turkey, however, has been declining. Countries where national scholarship programmes have prompted growth in numbers of international students, such as Brazil and Saudi Arabia, have largely overlooked EU destinations.

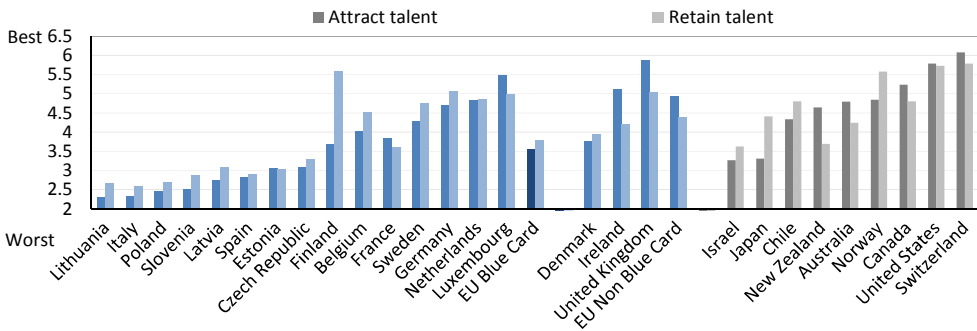
Surveys of entrepreneurs and executives show a mixed profile of attractiveness

Surveys of entrepreneurs and business leaders reveal perceptions of, if not the reality behind, the attractiveness of migrant destinations. The World Economic Forum's Executive Opinion Survey (WEF, 2014a) finds

that EU Member States are seen, on average, as being less attractive for “the best and brightest from around the world” than non-EU countries and EU Member States outside the common migration policy-making area (Figure 2.11).⁵ While the question is not directly related to legislative barriers, Member States covered by the relevant Directives tend to fare worse on this survey. Their average attractiveness score was 3.8 out of 10, compared with 4.9 for other EU Member States, and over 5 in Canada and the United States. Nonetheless, several EU Member States ranked well above the average, with Germany, the Netherlands and Luxembourg registering scores close to those of non-EU countries. As for perceptions of the EU’s retention capacity, they resembled those of attractiveness, with European countries generally better at retaining talent and non-European countries faring slightly worse.

Figure 2.11. Executives in EU Member States perceive greater difficulty in attracting and retaining talent than many other OECD destinations

Capacity of selected countries to attract or retain talent, 2013-14

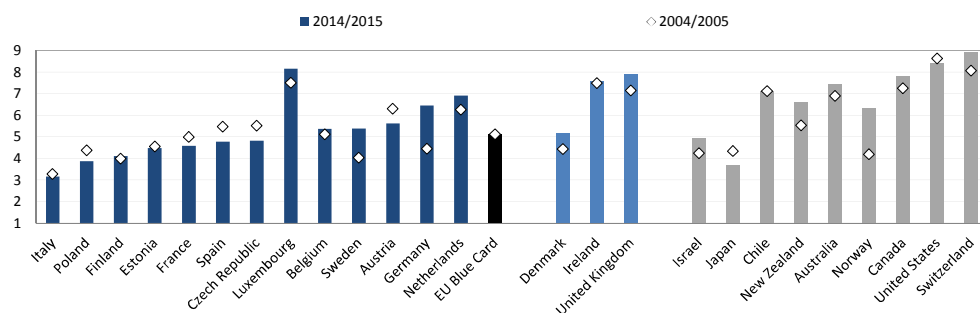


Source: WEF (2014b), *Global Competitiveness Report 2014-2015*, World Economic Forum, Geneva.

Business surveys also express a more global assessment of regions’ attractiveness to foreign talent. The *IMD World Competitiveness Yearbook* surveys leaders of internationally oriented businesses (Figure 2.12). Although it does not take migration policy into account, it does factor in income and tax, business culture, language, job opportunities and working conditions. While a number of major business destinations in the European Union are internationally competitive, the EU is less attractive than the major competing non-EU destinations on average. Moreover, the survey shows that, while a number of countries’ attractiveness assessment improved in the decade to 2014, many EU Member States appear to be perceived as less attractive than before.

Figure 2.12. Business leaders perceive many European destinations to be less attractive to highly skilled foreigners

Ranking on a scale of 0 to 10 by executives of responses to the question, “Are high-skilled people attracted to your country's business environment?”



Source: IMD World Competitiveness Yearbook, 2015.

Many EU residents perceive their countries as good places for migrants

More general surveys may show whether resident populations think their countries are good places for migrants. Gallup World Survey findings (from 2007-2013) reveal a wide range of responses, with some countries seen as very unattractive and others very attractive (Figure 2.13). A further finding was that countries with the most negative outlook in 2007 were much more positive in 2012, even though the economic circumstances in those countries worsened over the survey period. Nonetheless, the main non-EU OECD destinations scored very well in residents' perceptions of their countries, which they felt were good destinations. However, the EU average perception, even in the EU15 Member States, was below that of the traditional settlement destinations.

Figure 2.13. EU Member States vary significantly in terms of whether they think that their country is a good place for migrants from other countries

Share of the population who think that their city or area of residence is a good place for migrants from other countries to live, 2007 and 2012, and unweighted averages



Source: Gallup World Survey, 2007-2013.

The European Union is a destination of interest for potential migrants

The Gallup World Survey on migration intentions (2007-2013) finds that many people worldwide who would like to move permanently to another country: 38 000 respondents – 12.4% of the sample – said they would like to move permanently abroad (Gubert and Senne, 2016), while 5 100 – about 1% of the total sample – stated they would like to move abroad in the near future, within one year. The figures reflect the sentiments of an estimated group nearly 50 million aspiring migrants worldwide.⁶

In the survey, the largest group of respondents expressing the intention to migrate was in sub-Saharan Africa (41% of potential migrants), followed by Latin America (17%), Asia (16%), and the Middle East and North Africa (14%). An additional 75 million would like to move temporarily to work and a further 13 million to study. While

not all respondents will migrate, the sample yields an estimate of interest in the European Union relative to other destinations and gives an idea of the profiles of people who would prefer the European Union to other OECD destinations.

The survey asked respondents to indicate the country to which they were interested in migrating. The European Union as a whole was not among the possible responses, as only individual countries could be indicated. Most aspiring migrants were interested in EU/EEA and other OECD countries as permanent destinations (60%), temporary destinations (66%) and as places to study (75%).⁷ Among the would-be permanent migrants, the United States was the leading destination – 23% of respondents intending to migrate permanently wished to move there. This proportion was even higher among those wishing to move temporarily to work (26%) or to study (33%).

However, the share of individuals choosing one of the EU/EEA countries (excluding those wishing to move within the EU/EEA) is similar to the number interested in the United States at 23% (Table 2.9). The percentage corresponds to an estimated 11 million migrants who wish to move in the near future (one year). Within the European Union, the five most populous countries accounted for more than three-quarters of potential migrants: the United Kingdom, France, Germany, Spain, and Italy. It is noteworthy that Germany is the destination of interest for far fewer respondents than France.

Altogether, Canada, Australia and New Zealand are the desired destination of 10% of potentially permanent migrants. Their smaller populations make them relatively much more attractive. Indeed, the estimated number of would-be permanent migrants to the three countries is equivalent to their population, while for the United States the proportion is about 40% and, for the European Union, about 25%.

The survey also asked whether aspiring permanent migrants had taken concrete action to prepare their move and, if so, whether their choice of country translated into a real attempt to migrate. Overall, about one-third claimed to have taken concrete action. There was a higher likelihood of such action having been taken to migrate to Germany, to the United Kingdom, to smaller destinations in the European Union and to Canada, and a lower likelihood among those who identified Spain as their destination of choice.

Table 2.9. There is a large pool of potential migrants interested in coming to Europe, 2011

Share of the potential migrant population by desired destination who would like to move permanently

Potential migrants who wish to move... to...	...over lifetime (%)	Of those, share who wish to move in the next 12 months (%)	Of those, the share who have taken concrete actions* (%)
EU/EEA**	24%	23%	38%
United Kingdom	6%	5%	43%
France	4%	6%	38%
Germany	4%	3%	49%
Spain	3%	3%	25%
Italy	2%	2%	31%
Other EU28	3%	4%	45%
Other EEA	2%	1%	12%
Non-Europe OECD	35%	36%	36%
United States	22%	23%	34%
Canada	6%	6%	45%
Australia/New Zealand	5%	3%	40%
Other OECD	3%	3%	36%
Non-OECD	26%	34%	36%
Don't know/refused	11%	6%	26%
Missing	4%	-	-
Total**	100%	100%	36%
Estimated number (millions of adults)***	590.5	48.2	0.2

Note: Figures on permanent migration intentions generally relate to the year 2011 except for a few countries for which they relate to 2012, 2013 or 2014 because data for 2011 were not available. Figures on temporary migration intentions relate to the year 2010.

(*) Computed on those who said they were planning to move permanently in the next 12 months. (**) Figures exclude intra-EU/EEA mobility. (***) Extrapolated figures using sampling weights.

Source: Gallup World Surveys 2011-2014; Gubert and Senne (2016).

The Gallup Survey also asked about temporary intentions of migrating for work and study (Table 2.10). EU Member States were destinations of choice for about one in four would-be temporary labour migrants – a share that was lower than those who chose the United States. The European Union is also the wished-for destination of fewer aspiring international students than the United States. Within the European Union, the United Kingdom stands out as the leading destination of interest for students, while France and Germany compete for both temporary workers and students with similar shares – in contrast to France's more attractive position as a permanent destination.

Table 2.10. The European Union is a less popular destination for temporary workers and students

Individuals who would like to move temporarily, by motive and share of global total, 2011-14

Destination	To work	To study
EU/EEA*	22.8	25.2
United Kingdom	6.9	9.6
France	3.9	4.5
Germany	3.6	4.2
Spain	3.0	3.2
Italy	2.4	1.8
Other EU28	2.1	1.4
Other EEA	0.9	0.5
Other EU28	2.1	1.5
Other EEA	0.9	0.5
Non-Europe OECD	42.3	48.5
United States	26.1	32.6
Canada	5.1	4.9
Australia/New Zealand	3.8	3.4
Other OECD	7.3	7.6
Non-OECD	22.8	14.8
Don't know/refused	11.6	11.4
Missing	0.5	0.1
Total*	100	100
Estimated number (millions of adults)**	1 114	855

Note: Figures on permanent migration intentions generally relate to the year 2011 except for a few countries for which they relate to 2012, 2013 or 2014 because data for 2011 were not available. Figures on temporary migration intentions relate to year 2010.

(*) Figures exclude intra-EU/EEA mobility. (**) Extrapolated figures using sampling weights.

Source: Gallup World Surveys 2011-2014; Gubert and Senne (2016).

Far more respondents express an interest in temporary than in permanent migration. Converting responses into a numeric estimate of intentions yields 1.1 billion adults worldwide. The sheer size of that number, plus the absence of any way of measuring whether such intentions are realistic, makes it impossible to estimate the number of potential temporary migrants.

Nevertheless, figures on both permanent and temporary migration intentions offer an indication of the relative attractiveness of the EU by potential migrants' country of origin and characteristics (Table 2.11). The European Union is more attractive to potential migrants from nearby regions, especially in non-EU/EEA European countries (where 54.2% of migrants indicate the EU/EEA as their destination), the Middle East and

North Africa (32.9%) and sub-Saharan Africa (25.5%). Almost as many sub-Saharan Africans name the United States as their desired destination, even if the migration channel to the United States is still relatively small. And in the Middle East and North Africa, there is actually greater interest in Canada than in the United States, with 11.2% citing Canada as their destination of choice. Interest in Europe, by contrast, is lower than might be expected in light of how migrants are actually distributed.

Table 2.11. Other OECD destinations attract potential migrants even if they are far away, but the European Union is the most attractive for potential migrants in nearby regions

Distribution of potential migrants (who would be ready to leave in the next 12 months) across desired regions of destination, by country of origin, 2011

Region of destination	Region of origin						
	EU/EEA*	Other Europe	MENA	Sub-Saharan Africa	Latin America and the Caribbean	Asia	All*
EU/EEA	-	54%	33%	26%	19%	14%	23%
Top 5	-	32%	26%	22%	17%	9%	19%
Other EU28	-	20%	6%	3%	1%	4%	4%
Other EEA	-	2%	1%	1%	2%	0%	1%
Non-Europe OECD	47%	24%	25%	31%	50%	42%	36%
United States	15%	14%	8%	23%	42%	26%	23%
Canada	5%	4%	11%	6%	5%	6%	6%
Australia/New Zealand	20%	1%	3%	1%	1%	5%	3%
Other OECD	7%	5%	4%	1%	3%	5%	3%
Non-OECD	38%	15%	38%	37%	23%	41%	34%
Don't know/refused	15%	7%	4%	7%	8%	4%	6%
Total	100%	100%	100%	100%	100%	100%	100%
Nb. of observations	211	343	953	2 545	649	376	5 105
Population (thousands)**	3 206	2 402	6 655	19 697	8 145	7 676	48 182

Note: Figures on permanent migration intentions generally relate to year 2011 except for a few countries for which they relate to years 2012, 2013 or 2014 because of missing data in 2011.

(*) Figures exclude intra-EU/EEA mobility. (**) Extrapolated figures using sampling weights.

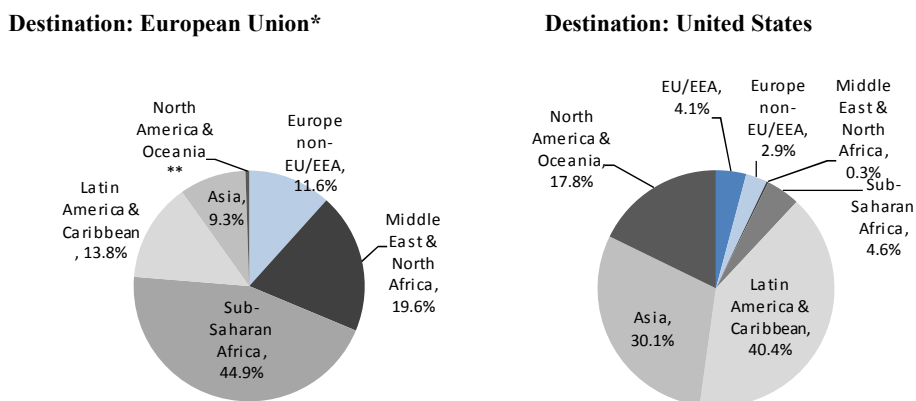
Source: Authors' analysis from Gallup World Surveys 2011-2014.

There are a comparable numbers of respondents interested in migrating to the United States and to the European Union. However, the European Union is substantially less attractive to migrants from Asia, with only 13.6% of those intending to migrate citing a EU Member State as their preferred destination (Figure 2.14), compared to the 42% who would choose the United States. As a consequence, the group of migrants who prefer the United States comprises a much larger number of Asians. Unsurprisingly, since respondents in Latin America and the Caribbean have cultural and historical ties and well-established migration channels to the United States, they make up a large share of

the migrants interested in moving to the United States. Among those wishing to go to the European Union, sub-Saharan Africans comprise 44.9%, Middle Eastern and North-African nationals 19.6%, would-be migrants from Latin America and the Caribbean 13.8%, and Asians 9.3%.

Figure 2.14. The number of Asians interested in migrating to the United States is much larger than the number interested in migrating to the European Union

Composition by origin of potential migrants (who would be ready to go in the next 12 months), shares of weighted total, 2011



Note: Extrapolated using sampling weights.

(*) Figures exclude intra-EU/EEA mobility. (**) denotes unreliable because of small number of observations.

Source: Gallup World Surveys 2011-2014; Gubert and Senne (2016).

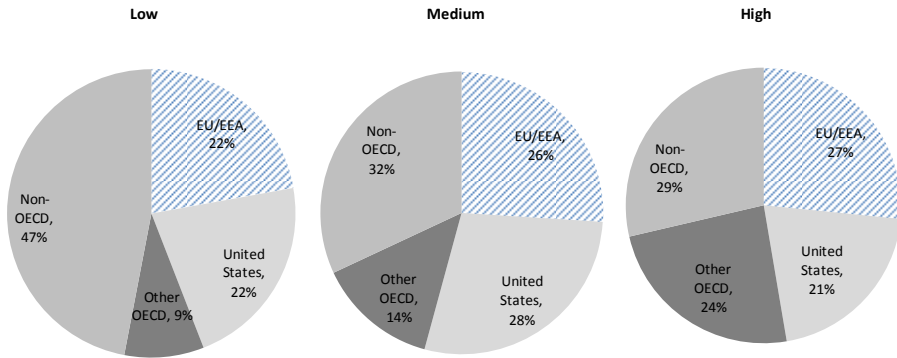
More than merely country of origin distinguishes the potential migrants who cite an EU Member State as their preferred destination. For example, 60% of the respondents who would like to migrate in the next 12 months are men. The tilt in gender balance is even more pronounced among potential migrants to EU Member States (63%), although it is driven by those who favour Italy and Spain, three-quarters of whom are men.⁸

Country preferences also differ sharply according to the level of education (Figure 2.15). Overall, the group of potential migrants principally comprises people who are educated to medium and low levels of attainment (55% and 32%, respectively). The low-educated tend to express a preference for non-OECD destinations, chiefly in the Gulf

Region, which reflects frequent migration patterns of less well educated workers from Asian and North African countries. As for the migrants educated to a medium level, 26% express a preference for EU/EEA countries, 28% for the United States, and 14% for other OECD destinations. Among the highly educated, EU/EEA countries exert the greatest appeal with 27% of preferences, compared with the United States’ 21%, and 24% for other OECD countries.

Figure 2.15. EU Member States rank top of the destinations for highly educated potential migrants

Preferred destinations of potential migrants (who would leave in the next 12 months), by education level, 2011



Note: Extrapolated using sampling weights. Figures exclude intra-EU/EEA mobility.

Source: Gallup World Surveys 2011 2014; Gubert and Senne (2016).

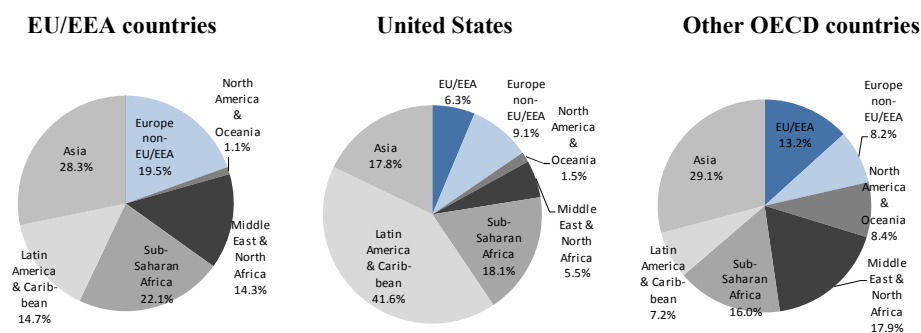
Among the most highly educated respondents to the Gallup World Surveys, the EU is the stated preference. Among potential migrants outside the European Union, the EU is the preferred destination for 29.5% of the total, more than the United States (21.5%), other OECD countries (23.3%) and non-OECD non-EU/EEA countries (25.7%). The strong appeal of Canada and Australia explains the high share of respondents expressing an interest in OECD countries other than those in Europe or the United States.

Highly educated migrants with an interest in Europe are primarily from Asia (28.3%) and sub-Saharan Africa (22.1%). However, Europe can point to an interest across the globe – with the exception of other English-speaking OECD countries (Figure 2.16). Those expressing a preference for Europe include highly educated migrants from Latin

America and the Caribbean (14.7%) and the Middle East and North Africa (14.3%). The United States – even if its inflow of highly educated migrants tends to be from Asia – nevertheless holds appeal for a sizeable share of highly educated potential migrants from Latin America and the Caribbean (41.6%). A smaller number of highly educated SCAC respondents aspire to emigrate to other OECD countries, whereas the share among those from the Middle East and North Africa is significant at 17.9%.

Figure 2.16. The European Union is an attractive destination for highly educated potential migrants

Composition of the highly educated expressing a migration preference, by origin and destination, 2011



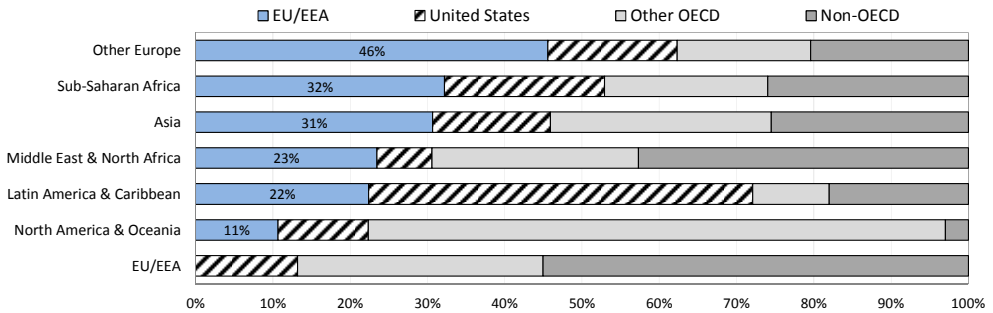
Note: Extrapolated using sampling weights. Figures exclude intra-EU/EEA mobility.

Source: Gallup World Surveys 2011-2014; Gubert and Senne (2016).

Europe is also the preferred destination for highly educated migrants from other neighbouring European countries and for those from sub-Saharan Africa (Figure 2.17). It also competes well for the interest of those from Asia, of whom 30.7% would like to head for Europe. Surprisingly, despite proximity and historical ties, highly educated migrants in the Middle East and North Africa are more likely to express a preference for destinations other than Europe. Only 23.5% of the highly educated from Middle East and North Africa reported wanting to go to Europe, while 35.9% of low- and medium-educated potential migrants from the region listed a European country as their preferred destination. This may reflect the fact that higher education opens more opportunities to migrate to other OECD destinations beyond traditional channels.

Figure 2.17. The European Union is the preferred destination of highly educated European and sub-Saharan potential migrants

Region or country preferred by group of potential migrants, high-educated only, by region of origin, 2011



Note: Extrapolated using sampling weights. Figures exclude intra-EU/EEA mobility.

Source: Gallup World Surveys 2011-2014; Gubert and Senne (2016).

The observations above are borne out by a destination choice model (Table 2.12). The regions of origin where potential migrants are more likely to express a preference for the EU/EEA are Europe, the Middle East and North Africa, and Sub-Saharan Africa. One striking finding to emerge from the model is that migrants who express a preference for Europe are more likely to be inactive in the labour market, neither employed nor looking for work. In addition, migrants who prefer a European destination are more likely to be single. There is a clear preference among the better educated migrants for non-EU/EEA OECD destinations. The analysis shows neither gender differences by destination nor age differences between the European Union and the United States.

Taken together, the evidence from the survey of migration intentions suggests that the European Union has not been left behind. Potential migrants with a high level of education are interested in migrating to the EU permanently, in numbers similar to other destinations. That, however, suggests that the European Union is punching below its demographic and economic weight in the competition for talent. Positive signs are evident in the interest around the globe for Europe – not only in neighbouring and traditional origin countries. Europe has work to do, however, if it is to improve its appeal in the competition with other OECD countries and even to non-OECD countries for highly educated migrants

Table 2.12. The European Union is more attractive to single, inactive less well educated potential migrants

Regression results of a multinomial logit model of destination choice

	Probability of choosing as desired destination:			
	EU/EEA	United States	Other OECD countries	Non-OECD countries
Male	0.001 (0.014)	0.013 (0.013)	-0.015 (0.01)	0.001 (0.015)
Age	-0.001 (0.001)	0.001 (0.001)	0.001** (0.000)	-0.001*** (0.000)
Marital status [ref.: Single]				
Married	-0.046*** (0.016)	0.002 (0.015)	-0.025** (0.012)	0.070*** (0.018)
Other	-0.055* (0.029)	-0.021 (0.025)	-0.026 (0.020)	0.102*** (0.033)
Education level [ref.: Low]				
Medium	-0.006 (0.016)	0.044*** (0.014)	0.044*** (0.011)	-0.081*** (0.017)
High	-0.027 (0.022)	0.034* (0.019)	0.062*** (0.016)	-0.070*** (0.025)
Employment status [ref.: Employed]				
Under/Unemployed	0.001 (0.017)	0.001 (0.015)	-0.019 (0.012)	0.017 (0.019)
Inactive	0.046*** (0.017)	-0.009 (0.015)	-0.007 (0.012)	-0.030* (0.018)
Network abroad	0.011 (0.015)	-0.013 (0.014)	-0.012 (0.011)	0.014 (0.016)
Region of origin [ref. Asia]				
EU/EEA	-	0.873 (24.919)	0.545 (14.544)	1.428 (46.249)
Other Europe	0.418*** (0.038)	-0.115** (0.045)	-0.02 (0.028)	-0.282*** (0.053)
North America/Oceania	-2.848 (0.995)	0.883 (125.73)	0.541 (73.385)	1.398 (233.35)
MENA	0.108*** (0.031)	-0.114*** (0.028)	0.018 (0.018)	-0.012 (0.032)
Sub-Saharan Africa	0.091*** (0.029)	-0.005 (0.024)	-0.057*** (0.018)	-0.029 (0.029)
Latin America and the Caribbean	-0.034 (0.034)	0.153*** (0.026)	-0.062*** (0.022)	-0.124*** (0.034)
Number of observations		4 244		

Note: The dependent variable is the desired region of destination among individuals intending to migrate in the next 12 months.

* $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$.

Source: Gubert and Senne (2016).

Visits to the EU Immigration Portal show wide-ranging interest in the EU

Evidence from traffic on the EU Immigration Portal – which attracted more than 50 000 unique visitors in 2015 to its site (ec.europa.eu/immigration) – confirms that there is interest in migrating to the European Union from a wide variety of origin countries (Table 2.13). The website provides migration information on individual

EU Member States. The top ten countries from outside the European Union for visitors to the website in 2015 accounted for only 35% of all visits, and the leading country – the United States – supplied just 8.5%. There was also variation in the countries of origin of visitors interested in the three most popular countries – Germany, the United Kingdom and France. Language ties influenced the countries in which visitors were interested. Brazilian visitors focused on Portugal, for example. Those from the Russian Federation went mainly to the Czech Republic web page. Visitor patterns underline the multifaceted attraction of the EU for different countries of origin.

Table 2.13. There is interest in migrating to Europe in many countries

Visits to the EU Immigration Portal ec.europa.eu/immigration (from outside the EU), 2015

Top ten countries from where the portal was visited	Share of total number of visits	Top three countries of interest
United States	8.5%	United Kingdom, Germany, France
Brazil	5.8%	Portugal, Sweden, Germany
India	5.3%	Germany, Poland, Belgium
Canada	2.5%	United Kingdom, France, Germany
Mexico	2.4%	United Kingdom, Ireland, Spain
Pakistan	2.3%	Ireland, Germany, Italy
Turkey	2.2%	United Kingdom, Germany, Netherlands
Ukraine	2.2%	Poland, Hungary, Germany
Russian Federation	2.1%	Germany, Czech Republic, Spain
Egypt	1.9%	Germany, United Kingdom, Sweden
All countries	100.0%	Germany, United Kingdom, France

Note: The analysis was restricted to the visits motivated by the search for information on migration for work, study or research.

Source: OECD analysis of reports on traffic to the EU Immigration Portal, January-September 2015.

This chapter has examined where the European Union stands in global migration flows and perceptions of entrepreneurs, residents and potential migrants. Individual EU Member States are positioned differently, with some well integrated into flows and comparable to non-EU OECD countries as attractive destination countries. Others lag behind, which accounts in part for the shortfall in appeal of the EU as a whole. The next chapter examines how and where EU-level action can bring added value to efforts to make the EU attractive and to ensure that it plays its full part in the international mobility of skills.

Notes

1. Here and in the following analysis where the DIOC database is used, Korea is not included among OECD countries.
2. The total stock of migrants grew by 16.9 million (64.2%) in the EU15 alone, compared with 12.2 million (+29.7%) in non-European OECD countries. Intra-European mobility was especially significant from the countries which joined the EU during the 2000s.
3. More than half of the work permits issued in the EU in 2014 were valid for less than a year, and are not shown in the table. Poland alone issued 200 000 short-term permits, chiefly as part of its temporary work programme with Ukraine and other neighbouring countries.
4. Intra-OECD mobility is also important, but the EU attracts less than one-third of all labour migrants from Japan and the United States.
5. The exact text of the survey question is “Does your country attract talented people from abroad? [1 = not at all; 7 = attracts the best and brightest from around the world]”.
6. Among these, about two-fifths have taken concrete steps to do so, a number close to the actual global migration flows.
7. Non-OECD/EU destinations of interest are primarily Saudi Arabia, the United Arab Emirates, South Africa and Russia, as many aspirant migrants are from countries which have well developed, plausible and familiar labour migration channels to those countries.
8. This reflects the gender composition of potential migrants in the main African origin countries, as well as the way migration routes to these countries have operated in the past, involving dangerous irregular migration channels and informal work in construction and other manual jobs for the pioneers.

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