

# COVID-19 and the Demand for Labour and Skills in Europe

## Early evidence and implications for migration policy

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### Executive Summary

The response to the COVID-19 pandemic has brought about a historic economic recession with significant consequences for employment and, in turn, immigration and skills policy. While it remains to be seen how lasting the pandemic's effects will be on the worst-hit sectors, such as hospitality, leisure, and tourism, the crisis appears to be entrenching existing weaknesses in European labour markets. For example, people working in low-paid, more precarious jobs have been harder hit than workers in more highly skilled positions, with a disproportionate impact on certain demographic groups, such as immigrants, women, and older people.

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The high levels of unemployment wrought by the crisis, coupled with ongoing disruptions to global migration and travel, will make it harder to address the pervasive skills and labour challenges Europe was already facing before the pandemic hit. Several European countries are projected to experience a

population contraction (as their residents age) and reduced labour supply (as older workers leave the workforce). At the same time, Europe's skills needs are changing rapidly. The knowledge economy is growing quickly, and structural and technological changes are simultaneously driving a contraction in middle-skilled jobs and increasing demand for workers at both ends of skills spectrum—those in high-skilled 'good' jobs and in less-skilled, more precarious 'bad' jobs.

In recent years, the European Union and several of its Member States have introduced policies designed to upskill residents and attract skilled workers from outside Europe. But achieving these objectives hinges on sustained investments to improve education and training (including participation in reskilling and upskilling initiatives) and to ensure that immigrants are able to successfully integrate into the labour market—the latter may prove challenging to prioritize in a context of high unemployment and constrained budgets.

Ultimately, the COVID-19 pandemic is likely to disrupt labour markets but not fundamentally alter the longer-term trends and challenges facing Europe. Failure to sufficiently invest in skills now may well have implications for how and how quickly their economies recover. Alongside investments in building the skills of resident workers, migration is likely to continue to play a role in meeting labour market

needs—even in the short term for high-priority roles such as health- and social-care workers—and in ensuring Europe can remain competitive. But at a time when many people are acutely feeling the pain of the recession and high unemployment, policymakers should take steps to clearly communicate the rationale behind labour migration policies and demonstrate their continued commitment to supporting their residents, both native and foreign born, in this challenging economic environment.

## 1 Introduction

The COVID-19 pandemic has sparked a deep economic recession across Europe, with major implications for employment and skills policy. The first half of 2020 witnessed a major shutdown of the European economy as governments closed their borders and introduced a variety of measures—including social distancing—to stem the spread of the virus. Although governments have sought to limit the impact of the pandemic on job losses through, for instance, short-time working schemes, there is a danger that unemployment levels might substantially increase over the coming months. This has been exacerbated as Europe headed into winter and the number of infections began to rise once more, with governments forced to (re-)introduce restrictions that curb economic activity.

To date, the pandemic's impact has been felt most acutely in those sectors where the need for social distancing has fundamentally affected business operations and consumer demand, such as hospitality, leisure, and tourism. Whether this represents a temporary or more lasting effect will depend ultimately upon the speed with which effective vaccines and treatments become widely available, and as of January 2021, the roll-out of vaccines had begun to take place across Europe. It is too soon to tell what the structural impacts of the crisis might be, but the longer the COVID-19 crisis continues, the greater

the likelihood that its effects will be structural and spread well beyond the hospitality, leisure, and tourism sectors.

What is clear, however, is that the pandemic has exacerbated existing labour market weaknesses within countries. It seems to disproportionately affect the labour market prospects of those in low-skilled and relatively precarious employment rather more than their counterparts in more highly skilled positions. In this respect, the impact of the COVID-19-induced economic slowdown on the labour market is much like that of previous recessions, such as the one following the financial crisis in 2008.<sup>1</sup>

Economic crises, such as the one which is unfolding across the European Union, are likely both to bear negative consequences for migrant workers already in Europe and to disrupt future migration. Historically, the European Union has relied upon migrants from outside its borders to meet a variety of labour market needs, some of which are related to the bloc's ageing population. But there is also a realisation that the European Union needs to be able to attract the best talent from around the world to support innovation and the growth of high-value economic activities that typically rely upon highly skilled and educated workers. And if the European Union wants to attract skilled workers from around the world, it needs to clearly signal that they are regarded as assets to its economy and society.

At a time when there is much focus on the immediate, short-term implications of the pandemic for employment and skill demand, it is important to keep an eye on the medium term. Projections of the European Union's demand for skills over the next ten years or so reveal that an increasing share of employment will be concentrated in high-skill jobs. Many of these are likely to be linked to science, technology, engineering, and mathematics (STEM) skills and driven by technological change. Failing to invest in these skills or plan for their future supply now

may well have implications for the future recovery of economies in Europe. Workers from third countries have been, and are likely to continue to be, an important source of these skills. Yet the COVID-19 pandemic has interrupted travel and immigration, and high levels of unemployment across the European Union may negatively affect the policy discourse related to labour migration.

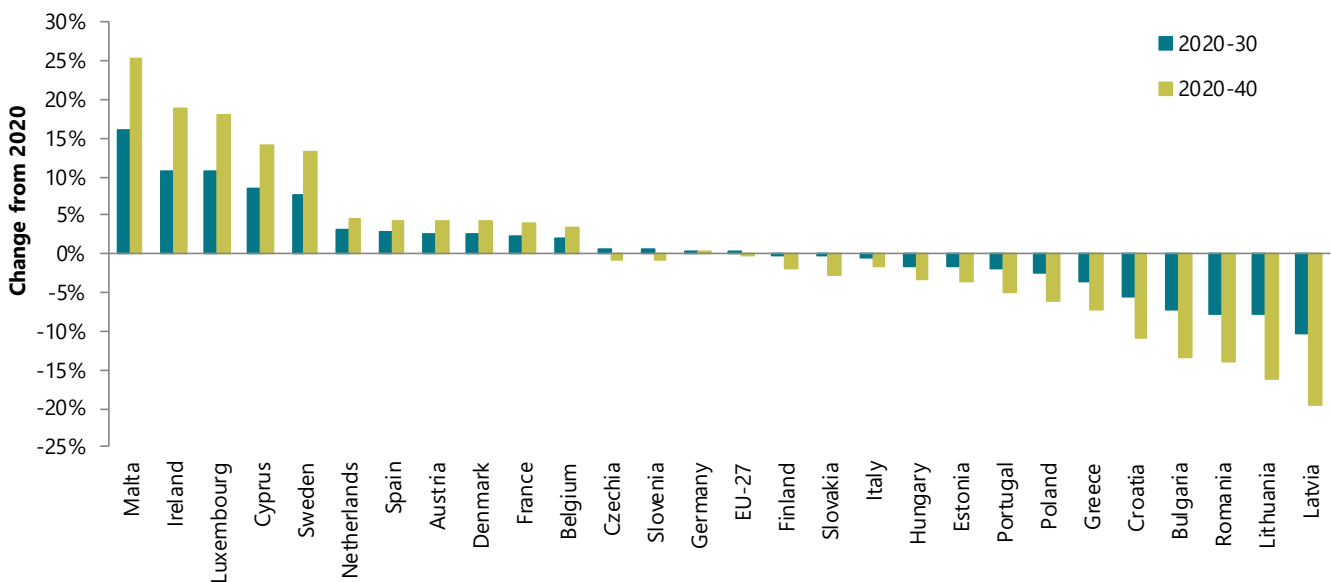
This issue brief explores how the pandemic is shaping the demand for workers and skills in EU Member States and how policymakers can respond to these changing demands. In particular, it looks at the current challenges COVID-19 poses to the labour market and its longer-term implications. Evidence is provided of short- and long-term skill needs in the European economy and the place of non-EU migrants in satisfying those needs. The brief also identifies the potential challenges facing policymakers as they decide upon labour migration priorities and strategies.

## 2 Europe’s Labour and Skills Challenge

Prior to the COVID-19 pandemic, the European Union had been focusing on the question of how to raise the skill levels of workers in Europe and broaden its pool of talent. This priority was rooted both in the scale of the demographic challenge facing Europe, and the transformation of skills needs driven by the growth of the knowledge economy and technological change.

Although it is readily acknowledged in policy circles, it is perhaps worth reiterating that the scale of the demographic challenge facing Europe is a stark one. Several countries will, according to current projections, face increasing population contraction (see Figure 1). Population change varies by Member State, with projections showing substantial contractions in many of the former Soviet-bloc countries

**FIGURE 1**  
**Projected Population Change in EU Member States, 2020–40**



Source: Eurostat, ‘Population on 1st January by Age, Sex and Type of Projection [proj\_19np]’; updated 20 July 2020.

and some Mediterranean ones. This is likely to prove a potential constraint on meeting future labour demand.<sup>2</sup>

The problems population contraction imposes upon a country are those of ageing (especially the dependency ratio) and reduced labour supply. Immigration does not necessarily solve the ageing problem. It can increase population size but, depending upon how old the immigrants are, the age structure of the population may not change much. In fact, a country may end up with a larger population but with the same ageing problem, albeit on a larger scale. In some respects, the challenge at hand is about attracting migrants who can contribute productivity-raising skills such that more can be produced by a smaller labour force. This is the argument advanced by, amongst others, demographer Wolfgang Lutz and colleagues in a 2019 study involving future population scenarios for the European Union.<sup>3</sup> In other words, the implication of the population projections for labour supply suggests that workers will need to be more productive in the future.

Alongside the demographic challenge is the question of how Europe meets its changing skills needs resulting from the growth of the knowledge economy and technological change. Over the last two decades or so, globalisation has led to many manufacturing jobs being offshored and, as a result, the loss of many skilled manual jobs in Europe. At the same time, some countries have introduced institutional changes that have, for example, affected employment protections and created more precarious jobs (many of which are low skilled). Technological change has further fuelled these trends, for example by enabling some middle-income, skilled jobs to be automated and by facilitating more flexible yet precarious employment (e.g., delivery jobs through online platforms).

Technological change has the potential to significantly reshape the labour market, though the pace

at which this will happen—and who will be affected—remains hotly debated. Until relatively recently, the process of technological change was regarded as skill biased. It has raised the demand for skills within jobs and, thereby, demand for human capital, which has rewarded the highly skilled and educated with both an increased chance of being in employment and the receipt of higher wages. Meanwhile, ‘routine’ jobs that involve a regular sequence of tasks lend themselves to being automated, with a concomitant loss of employment. Many of these routine jobs are in the middle of the occupational hierarchy, while those low-skilled jobs that require a degree of human interaction are proving much more difficult to automate (e.g., cafe and restaurant workers). Furthermore, growth in relatively high-paid jobs has created its own demand for relatively low-paid personal service jobs (e.g., the jobs relatively wealthy people hire others to undertake, such as household cleaning). The result is a growing polarisation between ‘good jobs’ associated with relatively good terms and conditions of employment, and ‘bad jobs’ associated with relatively low levels of skill and pay.<sup>4</sup>

More recently, however, with the widespread introduction of artificial intelligence and machine learning, technologies have become increasingly capable of being a substitute for non-routine tasks, because they can detect more sophisticated patterns. This may well affect relatively low-skilled jobs (e.g., replacing taxi drivers with driverless cars and automating call centres), but it also has the potential to affect those working in high-skilled jobs (e.g., automated code generators replacing computer programmers).<sup>5</sup> Somewhat speculatively, economist Carl Benedikt Frey and machine-learning expert Michael A. Osborne indicated in a 2013 study that there were large swathes of the workforce that were potentially at risk of their jobs being replaced through automation.<sup>6</sup> They estimated that 47 per cent of jobs in the United States were at high risk of automation, including many in construction and the service sector, with the warning that many more

jobs might be susceptible to automation given the new technologies increasingly coming on stream.

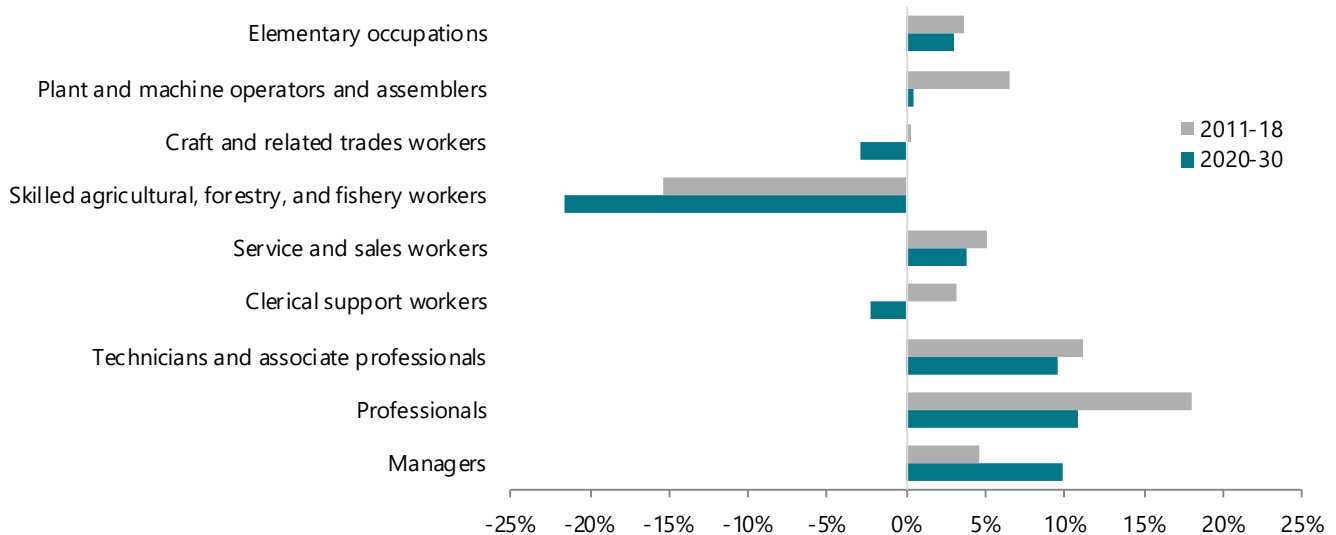
In practice, however, technological change may take place at a much slower pace than is typically thought. Employers have been shown to be cautious in making large-scale, transformative investments in technologies.<sup>7</sup> Accordingly, the high speed at which change is predicted to take place—which is implicit to those estimates that suggest sweeping changes in the structure and level of employment—may well be overstated. Moreover, employers have a degree of strategic choice with respect to how they configure jobs in relation to a specific technology, which has been seen to result in the skill content of jobs being enhanced rather than substituted.<sup>8</sup> The implication is that workers can be retrained or upskilled to fill the jobs that arise as a consequence of technological change.

Analyses of data from surveys that ask workers about their experiences of technological change and how it has affected their jobs indicate that the risk of automation substituting for workers' jobs is around

9 per cent to 14 per cent.<sup>9</sup> The impact of technological change to date in Europe would appear to affect those in relatively low-skilled jobs rather than those in the middle of the skill hierarchy. It is worth bearing in mind that it is often less-skilled jobs that are filled by foreign-born workers (both from other EU Member States and from non-EU countries) and that these changes are therefore of particular relevance to future immigration policy. Even if the number of jobs at risk of automation is much less than some of the more speculative estimates suggest, automation of even 9 per cent to 14 per cent of jobs would affect a large number of people (around 17 million to 27 million in the EU-27 in 2020), which, if converted even partially into unemployment, would exact a high social and economic cost.<sup>10</sup>

Trends in the occupational structure of employment reveal some evidence of the hollowing out of the European labour market, with relatively large increases in managerial, professional, and associate professional jobs and slightly weaker growth in relatively low-skilled assembler and elementary occupations (see Figure 2). The pre-pandemic projections of future skill needs in Europe produced by the European

**FIGURE 2**  
**Change in Occupational Employment in the EU-28, 2011–18 and 2020–30**



Sources: Author calculations based on data from Eurostat, 'EU Labour Force Survey (EU LFS)', accessed September 2020; European Centre for the Development of Vocational Training (Cedefop), 'Skills Panorama', accessed September 2020.

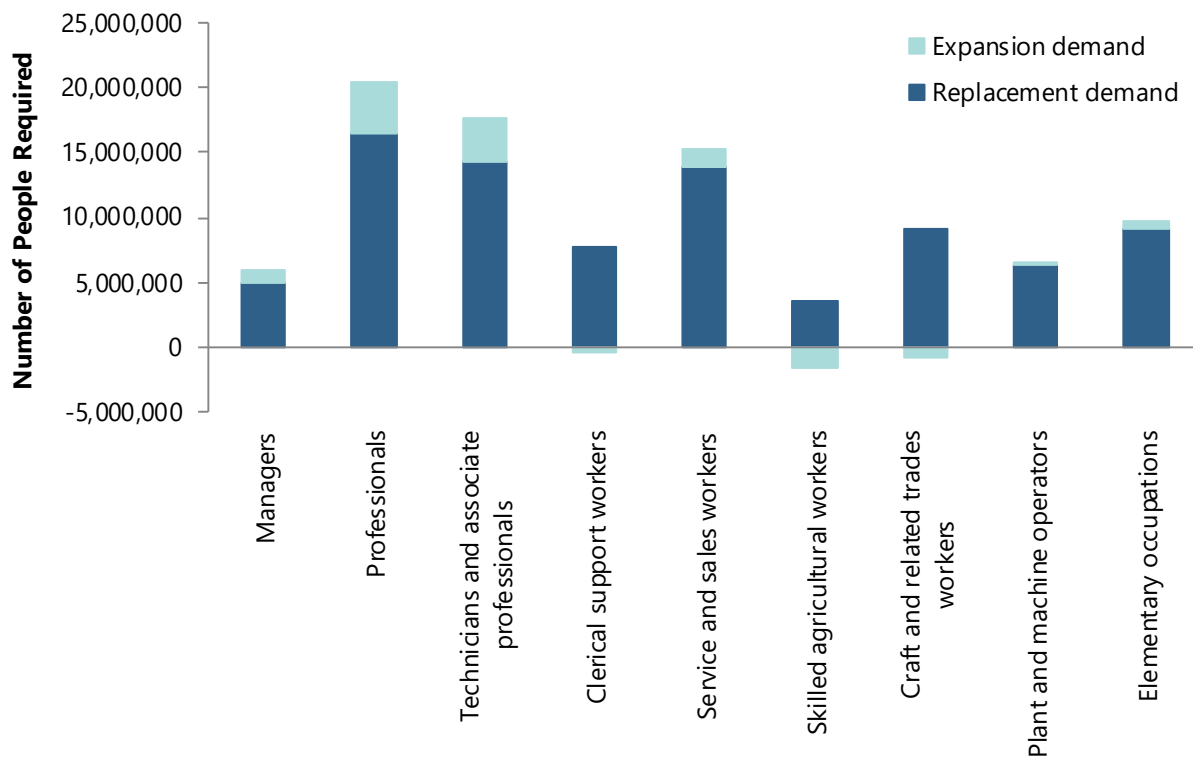
Centre for the Development of Vocational Training (Cedefop) indicate that this trend is likely to continue. But Cedefop’s projections of future employment also recognise that many people working in a particular job or occupation today will likely leave that job in the future for various reasons, such as retirement. These people will need to be replaced at least in part. As a result, even in those jobs where the total number of people employed is expected to decline (negative expansion demand), there will still be job openings that will need to be filled simply as a consequence of needing to replace workers who leave (replacement demand).

The level of replacement demand tends to be substantial, as can be seen in Figure 3. Technological change may reduce the overall level of demand for some jobs or occupations, but the need to replace workers exiting those occupations means that the

net impact is likely to be much more limited than might be initially expected when considering estimates of, say, 9 per cent to 14 per cent of jobs being substituted by automation.

Whilst technological change will affect the demand for skills over the medium to long term, this can be easily overstated as the evidence above indicates. There is likely to be a continuing demand for people to work in existing jobs. But as technological change raises demand for skilled workers, it appears that these skill demands are becoming more difficult to satisfy. A series of surveys by the multinational staffing firm Manpower, which ask employers about their recruitment difficulties, indicates that it has become increasingly difficult for employers to find the talent or skills they need. In their 2019 survey, they reported that more than half of all employers globally faced problems recruiting workers with the

**FIGURE 3**  
**Replacement and Expansion Demands in the EU-28, by Occupation, 2018–30**



Sources: Author calculations based on data from Cedefop ‘Skills Forecasts’, accessed September 2020; Cedefop, ‘Skills Panorama’.



skills or talents they needed.<sup>11</sup> The skills or jobs that employers found most difficult to fill included skilled trades, sales and marketing, IT, technicians, driving and logistics, engineering, and health care. In other words, employers continue to experience shortages across a wide range of skilled occupations.

Even if the COVID-19 pandemic reduces shortages if overall labour demand falls, these types of shortages may well reappear in the future, and employers will look to satisfy their demand wherever the skills are available—including outside the European Union. Accordingly, the need to attract highly qualified and skilled people from non-EU countries is likely to remain a feature of the labour market in Europe, as will be the European Union's policies to improve the skills of its existing population.

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Over recent decades many, if not all, EU Member States have invested heavily in their skill anticipation systems.<sup>12</sup> Cedefop has also undertaken extensive research on trying to prioritise skill shortage occupations—that is, to understand the extent to which the shortages were due to national education and training systems producing insufficient numbers of people with skills that (a) the labour market has a demand for, and that (b) have relatively long lead times associated with their development.<sup>13</sup> Individual countries have also sought to develop systems that transparently demonstrate the jobs for which it might be necessary to recruit from a third country. The Shortage Occupation List produced by the Migration Advisory Committee (MAC) in the United Kingdom is one example.<sup>14</sup> This list is based on a transparent system for identifying whether an occupation is experiencing shortages, with the meth-

odology publicly available and subject to periodic review. Australia has developed a similar methodology.<sup>15</sup> This kind of transparent approach to identifying which jobs or occupations should be open to migrants can be important, and especially so at a time of high unemployment because such systems can clearly demonstrate which vacancies are unlikely to be filled solely by resident workers and alternative sources of labour supply need to be found.

### 3 Policy Responses to Emerging Skills Needs

Skills policy at the EU level has been focused on, amongst other things, driving up the demand for and the supply of skills. Tilting the European Union towards a high-skill equilibrium was always a formidable task, even before the arrival of COVID-19. For example, there is a need to develop or attract workers able to meet demand for the range of digital skills that seem to increasingly be a feature of nearly every job. And the European Union's Green Deal emphasises the need to invest in those skills linked to various targets to reduce carbon emissions and increase energy efficiency.<sup>16</sup> But evidence from the Programme for the International Assessment of Adult Competencies illustrates the challenge at hand, given that a substantial share of EU residents lack basic skills in numeracy, literacy, and use of information and communication technology.<sup>17</sup> Eurostat's own surveys of technology usage indicate that, as of 2019, 29 per cent of Europeans possessed a low level digital skills.<sup>18</sup>

At the European level, the challenges set out above have translated into policy priorities across a number of different portfolios, including:

- ▶ an economic policy agenda focused on shifting more activity into high-skilled, high-value-added segments of the global market and on developing the policies related

to research and development, improving competitiveness, and so on that are needed to achieve this goal;

- ▶ a skills policy that recognises the need to better satisfy the current and future skill needs of the labour market (at all levels) and, at the same time, that looks to ratchet up the skill levels of EU residents;
- ▶ a social inclusion agenda that, amongst other things, seeks to give all EU citizens and residents an opportunity to develop their skills; and
- ▶ a recognition that the European Union needs to be able to attract highly skilled and educated labour from across the world and, at the same time, to ensure that opportunities remain open to non-EU migrants already residing in Europe.

Successive EU skills agendas have emphasised the need to raise skills levels in Europe to tackle the three-pronged challenge of (1) increasing productivity and competitiveness, (2) managing the process of technological change in both its digital and green guises, and (3) bringing about increased levels of social inclusion. To differing degrees, these have been present in *New Skills for New Jobs* (2010), the *New Skills Agenda for Europe* (2016), and, most recently, the *European Skills Agenda for Sustainable Competitiveness, Social Fairness, and Resilience* (2020).<sup>19</sup> Reskilling and upskilling are a common priority: the 2016 *New Skills Agenda*, for instance, placed a particular emphasis upon Upskilling Pathways designed to help adults acquire the minimum level of literacy, numeracy, and digital skills and/or a broader set of skills by working towards an upper secondary qualification equivalent to Levels 3 or 4 in the European Qualifications Framework. All of these aims have been boosted by the first chapter of the European Pillar of Social Rights, which says: ‘Everyone has the right to quality and inclusive education, training,

and life-long learning in order to maintain and acquire skills that enable them to participate fully in society and manage successfully transitions in the labour market.’<sup>20</sup>

The 2020 skills agenda is keenly aware of the factors that are likely to inhibit reskilling and upskilling. It emphasises strengthening skills intelligence and providing a means to empower individuals to take up their right to training via, for instance, individual learning accounts.<sup>21</sup> This empowerment-focused element is particularly novel, in that it gives individuals the means to access training as a right. The ambitious training targets that accompany the new skills agenda are designed to further boost participation in reskilling and upskilling initiatives.

But progress towards meeting the goals of the various skill agendas has been, arguably, slow. The magnitude of the European Union’s proposed changes (and their systemic nature) means this transformation was always likely to be incremental. Nevertheless, the European Union needs to redouble its efforts to meet emerging skill needs over the short to medium term if its global competitiveness is to be improved. This is clear from all its successive skill agendas. This is where migration policy can play a role.

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In recent years, the European Union and several of its Member States have introduced reforms designed to attract and retain skilled workers from outside Europe. At the EU level, the new Pact on Migration and Asylum published in September 2020



included plans to enhance legal pathways into the European Union, including through new ‘talent partnerships’ and plans to relaunch negotiations to reform the Blue Card Directive to attract highly skilled workers.<sup>22</sup> And at the national level, Germany’s *Skilled Immigration Act* came into force in March 2020, expanding the definition of skilled workers to include those with vocational qualifications, while the United Kingdom continues to work on a post-Brexit immigration system that will focus on middle- and high-skilled workers.<sup>23</sup> Other countries, such as France, have introduced policies targeting workers and entrepreneurs in high-growth sectors such as tech.<sup>24</sup>

Alongside these labour migration schemes, policies to attract and retain international students can also be an important source of skilled labour. The European Union is a relatively attractive destination for students from outside the bloc (with numbers increasing in recent years),<sup>25</sup> but even before the pandemic, concerns were aired about retention—that is, the rates at which students remain in Europe after completing their studies. It has been estimated that between 16 per cent and 30 per cent of international students exchange their education-related residence permits for another type of stay permit.<sup>26</sup> And there have been policy initiatives at both the EU level (e.g., the Students and Researchers Directive 2016/801) and the national level to make it easier for highly skilled and qualified migrants from third countries to remain in the European Union (e.g., post-study visas).<sup>27</sup>

At the same time, the impact of immigration in both meeting skills needs and mitigating longer-term demographic trends hinges on migrants’ successful labour market integration. Indeed, a 2019 study involving a set of demographic scenarios suggests that the contribution immigration can make towards solving the European Union’s ageing population problem is very much dependent upon their integration and participation in the labour force.<sup>28</sup>

While a substantial share of non-EU migrants hold high-skilled jobs, their overall position in the labour market remains relatively weak. The occupational profile of third-country nationals reveals that they are more likely to be working in relatively low-skilled jobs compared with either native-born workers or migrants from other parts of the European Union.<sup>29</sup> And labour outcomes are especially poor for young migrants, where the NEET rate (the share not in education, employment, or training, including both those seeking and not seeking work) is particularly high compared with peers born in the European Union (see Table 1). There are also concerns that the labour force participation of non-EU migrant women is on average relatively low compared with women born in the European Union, although this varies significantly among different nationalities.<sup>30</sup> This suggests that the existing stock of non-EU-born people in the European Union is a potential source of skills that could be more fully activated.

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Evidence suggests that the economic crisis that began in 2008 adversely affected non-EU migrants more so than people born in the European Union,<sup>31</sup> especially so in relation to unemployment. But even when immigrants are able to remain in employment during tough economic times, this can sometimes take the form of in-work poverty. In 2017, in the European Union, 18 per cent of immigrants were in poverty compared with 8 per cent of their native-born counterparts.<sup>32</sup> Whilst the labour market position of migrants has improved since the last recession, there is the risk that this will be undone as a

**TABLE 1**  
**Educational and Labour Market Characteristics of People in the European Union, by Nativity, 2009 and 2019**

	Born outside EU-27			Born inside EU-27		
	2009	2019	% Point Change	2009	2019	% Point Change
<b>Education</b>						
At most, educational attainment equivalent to lower secondary school (all adults)	45.9%	39.8%	-6.1	31.3%	24.1%	-7.2
At most, educational attainment equivalent to lower secondary school (18-to-24-year-olds, i.e., early leavers)	33.0%	22.5%	-10.5	12.6%	8.9%	-3.7
<b>Young People (ages 15–24)</b>						
Not in education, employment, or training* (NEET)	22.8%	17.4%	-5.4	11.7%	9.5%	-2.2
Youth unemployment	31.7%	23.4%	-8.3	19.9%	14.5%	-5.4
<b>Labour Market</b>						
Economically active	71.3%	71.1%	-0.2	69.9%	73.4%	3.5
Unemployment rate	17.6%	12.4%	-5.2	8.4%	6.1%	-2.3

ISCED = International Standard Classification of Education.

\* The NEET rate includes both unemployed individuals (those without a job and seeking one) and individuals not in the labour force (those without a job and *not* seeking one).

Sources: Eurostat, 'Activity Rates by Sex, Age, and Country of Birth (%) [lfsa\_argacob]', updated 11 November 2020; Eurostat, 'Unemployment Rates by Sex, Age, and Country of Birth (%) [lfsa\_urgacob]', updated 11 November 2020; Eurostat, 'Young People Neither in Employment nor in Education and Training by Sex, Age, and Country of Birth (NEET Rates) [edat\_lfse\_28]', updated 8 October 2020; Eurostat, 'Early Leavers from Education and Training by Sex and Country of Birth [edat\_lfse\_02]', updated 8 October 2020; Eurostat, 'Population by Educational Attainment Level, Sex, Age, and Country of Birth (%) [edat\_lfs\_9912]', updated 6 November 2020. See also Eurostat, 'Migrant Integration Statistics – Labour Market Indicators', updated April 2020; Eurostat, 'Migrant Integration Statistics – Education', updated April 2020.

consequence of the COVID-19 pandemic and resulting severe economic downturn.

In sum, the skill challenge facing the European Union over the medium term is a formidable one. Improving the skills of EU residents via, for instance, the Upskilling Pathways and the various national policies oriented towards improving skill levels are vitally important. Immigration has a role to play too in boosting the supply of labour and skills. But if immigration is to have a role, the integration of people who move to the European Union—whether

through labour or other channels—is all important so that they do not become marginalised. The economic crisis that has followed hard on the heels of the pandemic has radically changed the context in which discussions of employment, labour, and skills are taking place, and it typically takes several years for employment to recover to pre-recession levels. At a time like this, when there is an excess supply of labour within European countries, it is not necessarily an opportune moment to advocate for policies that encourage migration. But, as noted above, there is a need to look beyond the short term and to

think about the longer-term needs of the EU labour market. The European Union, with its *Skills Agenda for Sustainable Competitiveness, Social Fairness, and Resilience*, set an ambitious target for itself that will require it to maximise all of the skills potentially within its reach, including by attracting skilled workers from outside the European Union.

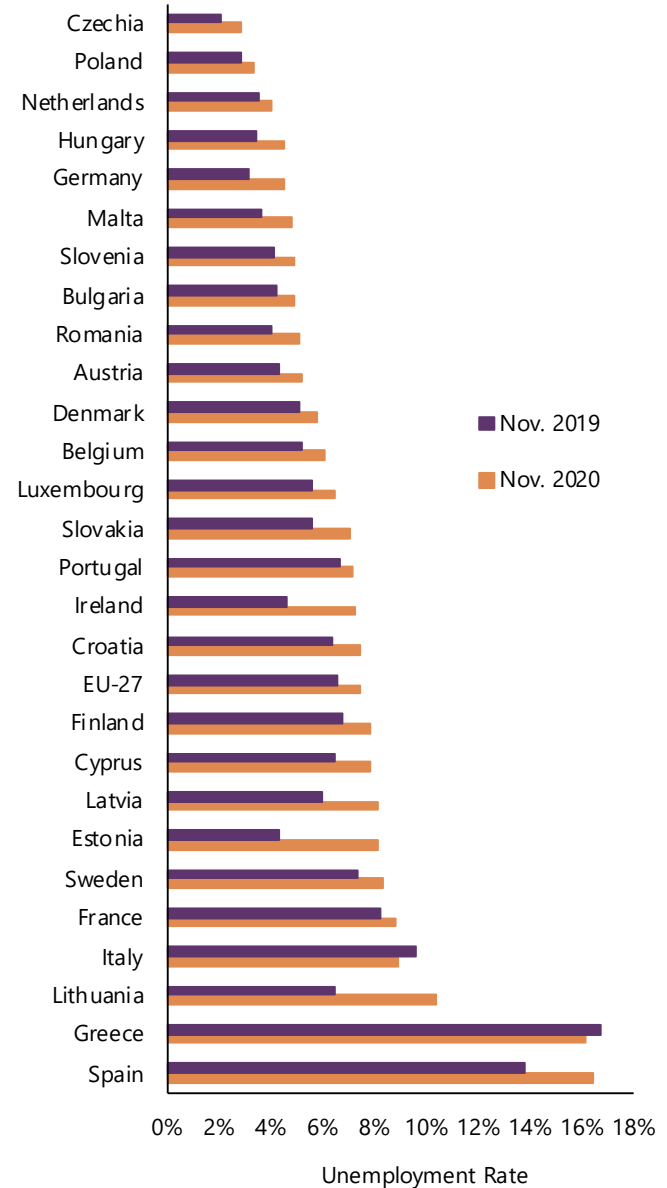
## 4 The Impact of COVID-19 on the Demand for Skills and the Future of Work

The recession following the onset of the pandemic is deep. The forecast is for output to fall by -7.4 per cent in the EU-27 during 2020, but this varies by Member State.<sup>33</sup> Germany’s economy, for example, is forecast to fall by -5.6 per cent, but the drop is expected to be -12.4 per cent in Spain, -9.9 per cent in Italy, and -9.4 per cent in France.<sup>34</sup> A rapid bounce back is forecast for 2021, when the EU-27 economy is expected to grow by 4.1 per cent, but much uncertainty surrounds these forecasts as they are linked to the future trajectory of the pandemic. It is readily apparent that the number of infections has picked up again as Europe headed into winter. Whether this will affect the economy as it did in the first half of 2020, when the EU economy was operating at 25 per cent to 30 per cent below capacity, remains to be seen.<sup>35</sup>

Figure 4 shows how the unemployment rate has risen across Europe from November 2019, before the pandemic, to November 2020, when countries were beginning to emerge from their lockdowns. The fear is that unemployment levels will rise into 2021 as job support schemes are withdrawn or provide more targeted assistance. There does tend to be a lag between an economy’s output falling and unemployment beginning to rise; similarly, once output

begins to increase there tends to be a lag before unemployment levels begin to fall.

**FIGURE 4**  
**Unemployment Levels in the EU-27, November 2019 and November 2020**



Source: Eurostat, ‘Unemployment by Sex and Age – Monthly Data [une\_rt\_m]’, updated January 2021.

Job vacancies have also fallen away. In Germany, Eurostat vacancy data reveals that the number of vacancies fell by 31 per cent between quarter three of 2019 and quarter three of 2020, and the United

**BOX 1****Sectors Most Affected by the Pandemic**

While many aspects of European economies have been affected by the COVID-19 pandemic, sectors that fall into the following two categories have been hit particularly hard:

- ▶ **Mostly nonessential and partly active, not teleworkable sectors.** This includes the majority of manufacturing, as well as some machine and computer repair activities and construction. These activities are neither essential nor teleworkable, but since occupations within them generally do not involve directly interacting with clients, many have been allowed to continue operations, with strict safety measures, in areas where regular confinement measures are in place to stop the spread of the virus (as opposed to more complete lockdowns).
- ▶ **Sectors affected by closures.** This includes hotels and accommodations, restaurants, estate and travel agencies, and leisure and recreation services. Jobs in these sectors are generally deemed nonessential, and many businesses have explicitly been closed by confinement decrees and cannot continue to function via telework.

Source: definitions adapted from Marta Fana et al., *The COVID Confinement Measures and EU Labour Markets* (Luxembourg: Publications Office of the European Union, 2020).

Kingdom's vacancies fell by 41 per cent in this period. This represents a rapid and deep weakening of labour demand.<sup>36</sup>

One way of assessing which parts of the economy are being particularly acutely affected by the pandemic is to categorise jobs as to whether they are in sectors that were closed during the lockdown or that were considered nonessential and not amenable to telework—conditions that imply at least some workers would have been laid off.<sup>37</sup> The sectors in each category are presented in Box 1. Within the 'closed' category are sectors typically associated with tourism, an industry that employs many people from outside the European Union.

Another way of looking at the jobs particularly at risk from COVID-19 is by looking at whether a job is at risk of being disrupted by social-distancing measures. A study published in May 2020 using information from the European Skills and Jobs Survey—which contains data on the level of physical proximity or contact workers have with others and

on the degree to which a given job can be done remotely using digital technologies—identified particularly at-risk jobs.<sup>38</sup> The results reveal that around one-quarter of jobs (23 per cent) have a very high risk of being disrupted by COVID-19, and a further one-fifth (22 per cent)—mostly in medium- to lower-skilled service provision—are exposed to some risk. The analysis notes that the burden falls disproportionately on women, older employees, migrants, and those with relatively low levels of education.<sup>39</sup> Table 2 shows the jobs and sectors identified as most at risk. Again, these include occupations such as accommodation and food service worker jobs that tend to employ people from outside the European Union.

Other estimates suggest that under a pessimistic scenario where the pandemic proves difficult to contain in Europe, unemployment could continue to rise, peaking at 11 per cent in 2021 before recovering to pre-pandemic levels in 2024.<sup>40</sup> Most of the projected job losses would appear to be concentrated in customer service and sales (25 per cent), food

TABLE 2

**Sectors and Jobs at Risk of Being Disrupted by the COVID-19 Pandemic**

Sectors	Occupations / Jobs
<i>Very high risk</i>	
Accommodation and food services	Care workers
Wholesale and retail trade, sales, and shopping	Personal service workers
Social and personal services	Hospitality and retail managers
	Health professionals (e.g., doctors, dentists)
	Food preparation helpers
	Health associate professionals (e.g., medical technicians)
<i>High risk</i>	
Education and health services	Drivers and vehicle operators
Agriculture, horticulture, forestry, and fishing	Cleaners and helpers
Cultural industries (arts and entertainment)	Customer clerks
Transportation and storage	Protection workers (e.g., security guards)
	Street service workers
	Agricultural labourers
	Farmworkers and gardeners
	Construction workers
	Business managers
	Teaching professionals
	Forestry and fishery workers
	CEOs, legislators, and senior officials

Source: Konstantinos Pouliakas and Jiri Branka, 'EU Jobs at Highest Risk of Covid-19 Social Distancing: Is the Pandemic Exacerbating the Labour Market Divide?' (Cedefop Working Paper No 1., Publications Office of the European Union, Luxembourg, May 2020).

services (13 per cent), and building occupations (12 per cent). Whether or not these job losses come to pass will be dependent upon the extent to which:

- ▶ various active labour market measures (such as furloughs or short-time working schemes) have the capability to offset job losses; and
- ▶ increased demand for jobs directly related to the pandemic (e.g., delivery jobs, given increased online retailing) is able to absorb some of the expected job losses.

Across Europe, countries have introduced a mix of policies to prevent unemployment from accelerating too quickly.<sup>41</sup> These include:

- ▶ job retention schemes, including short-time working and wage subsidies;
- ▶ increases to unemployment benefits; and
- ▶ enhanced active labour market policies to assist people in finding work (e.g., retraining programmes), especially those in vulnerable groups.

The number of people taking advantage of these policies has been substantial. In Germany, for example, the short-time working allowance scheme (in which the state meets a share of employees' wages if their hours have been reduced) received applications for 42,206 employees in February 2020.<sup>42</sup> This



had increased to 1,059,467 in May 2020. Similarly, in the United Kingdom, which had not previously had a short-time working scheme before the pandemic, 3.8 million furloughed workers were receiving part of their wage from the state in April and this had risen to 9.9 million in December 2020.<sup>43</sup> In both the German and UK cases, migrant workers have been eligible for the schemes.

The level of support available, or rather the form in which it is given, has raised concerns that nonviable jobs are being sustained, which may impede the structural adjustments necessary to bring about a quick bounce-back in 2021 and beyond. This has the potential to act as a drag on productivity growth if nonviable companies survive because they are being propped up by various forms of government support. This suggests that likely increases in unemployment levels are being delayed as governments concentrate on maintaining current levels of employment. It is worth bearing in mind that the European Union's Next Generation EU Recovery Plan of 750 billion euros—which will provide support for investment, mainly after 2021, through a mixture of grants and loans—may be vitally important in quickening the pace of recovery.<sup>44</sup>

There are, however, some new job openings emerging as a direct result of the pandemic. This is particularly the case for health and social care jobs (which employ relatively large numbers of migrant workers in countries such as the United Kingdom), COVID-19 tracers, and delivery jobs. To meet these needs, governments have explored ways to tap the pool of recently unemployed workers. In Sweden, there have been moves to retrain airline cabin workers for health-care roles, for example.<sup>45</sup> Moreover, there have been attempts to redeploy workers who have lost their jobs to work in those areas of the economy that have been reliant upon migrant workers and are facing labour shortages due to travel restrictions, such as seasonal agriculture, albeit with mixed results to date.<sup>46</sup>

But there are limitations to these efforts, especially in the short term. Labour markets are not always able to rapidly adjust to shocks such as the current one; it is not always possible to shift people from one skill group to another, especially if it takes several years to train someone to enter a particular occupation. Even in a relatively flexible labour market, such as the United Kingdom, it is apparent that there are occupations for which it still proves difficult to recruit people and that should be included on the list of shortage occupations open to third-country migrants, even during an economic downturn. These include senior care workers and nursing assistants.<sup>47</sup> There are also likely to be labour market rigidities of one kind or another that affect the reallocation of labour within countries. It is worth bearing in mind that as the inevitable recovery gathers pace, there is always the risk that unaddressed skill shortages might inhibit it in some way.

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To date, the primary economic impact of COVID-19 has been inducing a skill-biased recession, in so far as it appears to be affecting less skilled and educated groups the most—a pattern it shares with many past recessions.<sup>48</sup> To some extent, there may well be bumping down in the economy, whereby more highly skilled and educated workers take up jobs that might have once been held by less-skilled workers. The short-term prognosis is that migrants are amongst the groups most affected because they are more likely to be in relatively precarious jobs, have a heightened risk of job loss or substantially reduced earnings, and/or of becoming increasingly socially excluded as a consequence of the pandemic.

## 5 Conclusion and Recommendations

For the time being, governments appear to be trying to hold the fort—attempting to help people remain in their current jobs and avoid a potentially massive rise in unemployment in the hope that the recovery will come quickly in 2021 and be a rapid one, and that the various forms of support on offer can be withdrawn or have fewer claims made on them. As vaccines become increasingly available, this may well provide the much-needed fillip to the economy. Still, the risk remains that if employers substantially reduce their number of employees now, and in doing so lose their skills, there is no guarantee that they will be able to re-recruit workers with those skills when the economy recovers. Thus, policies focused on keeping people in work and meeting longer-term skills needs are of utmost importance as Europe looks ahead.

As the analysis in this brief makes clear, the European Union has in recent years sought to increase its attractiveness to migrants who can contribute to its social and economic goals. In light of the pandemic and severe economic downturn, employment, skills, and migration policies need to address three primary concerns: the situation of migrants and other workers already resident in the European Union; short-term skill needs; and longer-term skill needs.

### A. *The position of migrants and other workers in the European Union*

Member States have introduced various policies to increase the economic activity rates of members of migrant households, address relatively high NEET rates amongst young people, and so on. It is important that these policies do not become abandoned or fall into abeyance. The jobs market may be a

depressingly weak one, but there is still much that can be undertaken or maintained to help people become active labour market participants and potentially increase Europe's labour supply.

In forging ahead with existing policies or designing new ones, it is important to recognise that recessions tend to affect disproportionately those whose position in the labour market is already relatively weak. Thus, there is a need to learn from previous recessions what works well in helping people—especially those who occupy a relatively weak labour market position—either retain their jobs or access the retraining opportunities that will allow them to eventually find new jobs. It is also important to ensure that this economic downturn does not undo much of the progress made in the recent past.

Policymakers should also remain fully committed to supporting the integration of migrants resident in Europe, even in this challenging economic environment. In part, this is a signalling exercise, showing people who have been granted permission to live and work in the European Union that they are regarded as long-term assets who can contribute to Europe's long-term economic and social goals. It also sends a clear message to prospective immigrants that Europe is a place that will value their contributions.

### B. *Short-term employment and skill needs*

Across Europe, it is apparent that there are skill needs that are still proving difficult to meet, despite the weakening of the labour market. One example is the addition of occupations such as senior care workers to the UK Shortage Occupation List in 2020, even though labour demand in the country is weakening. Just because employment is falling does not mean that those who have lost their jobs can be readily transferred to the jobs that are available. And

pervasive skill shortages not only pose immediate challenges for providing essential goods and services, but they also risk constraining business development and potentially slowing the post-pandemic economic recovery.

Even during this severe economic recession, immigration is likely to be an important tool for helping European countries meet some skill needs. Governments will need to carefully consider the sensitivities around continuing to recruit from abroad during this period. Namely, it is important to ensure there are transparent mechanisms in place to prevent migrant labour being used to undercut the wages of workers already living in the European Union (both EU and third-country nationals); these may include labour market tests, salary thresholds, or limiting labour immigration to occupations designated as experiencing shortages. It will also be critical that policymakers are able to explain the rationale behind migration policies to the public. In the context of a weak labour market, it is crucial to have a system in place that clearly signals when and under what circumstances skills may need to be imported from abroad, and as a result, how migration can complement ongoing upskilling and retraining initiatives for resident workers.

### *C. Longer-term employment and skill needs*

Policymakers must also keep one eye towards the longer-term trends shaping European economies. Chief among these is the hollowing out of the labour market, with more people being employed in relatively high- and relatively low-skilled jobs, and fewer in middle-skilled positions. Even though the European Union, through its various skills agendas, has put in place measures to increase and improve the domestic skills supply, there is a recognition that skills will still need to be recruited from around the world to meet emerging needs.

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### *Policymakers must also keep one eye towards the longer-term trends shaping European economies.*

To attract highly skilled individuals and exceptional talent, the European Union and its Member States need to continue reviewing their policies to make it easier for those with particularly scarce skills to enter and, in doing so, allow Europe to better compete with other regions for such workers. Even during this period of deep recession, it is important to continue pursuing these policies (such as reforming the Blue Card scheme) to ensure that Europe will have the skills it needs for a rapid and sustained economic recovery and future growth.

Students from third countries are an important source of future skills for the European Union. The pandemic will potentially reduce the number of international students attending European universities, and from a skills perspective, it is important to ensure that any such dip in student numbers is temporary. Now may be the time to think about how to design or improve policies aimed at retaining students once they complete their studies, especially if they possess skills that will fuel technological change and innovation.

All of the above points to the value of having an EU perspective on future skill needs and the extent to which they can or cannot be filled by workers from within the European Union. EU Member States over the past 20 years or so have invested heavily in skills anticipation systems. There is potential scope to use these systems to assess the extent to which labour supply is sufficient to meet future skills and, if not, how (and to what extent) migration can be a source of labour and skills. For the time being, much of the emphasis is likely to be on reducing domestic unemployment, but it is also important to plan for the longer term. There is scope at the EU level to develop a means or framework for assessing whether

a vacancy should be open to workers from outside the European Union. To do so, it could build upon the work that has already been undertaken at the national level to map and anticipate skills needs.

#### *D. Final reflections*

The ongoing COVID-19 crisis and its impact on the labour market—especially employment and unemployment levels—run the danger of diverting attention from the longer-term skill needs of the European Union. But as this issue brief highlights, migration from third countries has and will continue

to have an important role in Europe's efforts to meet these needs and remain competitive. Yet if migration to the European Union is to continue, even at a time of relatively weak labour market demand, there needs to be a transparent system in place to indicate where there are needs and why immigration is the right tool to meet them. High level messages are important—such as on the need to attract exceptional talent to the European Union—but so too is detailed information about why certain jobs need to be open to third-country nationals. Such an approach will be vital to the policy discourse around meeting Europe's skills needs and the role of migration, both in the immediate and the longer term.

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