



INTERNATIONAL TALENT MAP

A DATA DRIVEN BENCHMARK ACROSS SELECTED EUROPEAN COUNTRIES:

Drivers and challenges regarding attracting and retaining international talent for places and employers.

*INSIGHTS FROM 300+ COMPANIES
AND 2600+ TALENTS*

LINKÖPING
SCIENCE
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SWITCH TO
SWEDEN

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1. About the International Talent Map

Background

In 2022 Switch to Sweden in collaboration with Linköping Science Park, Terminal 5, and Future Place Leadership published the “Talent Map Report: Academic International Talent and Companies in Sweden.” The findings served to support the mapping of needs, challenges, and opportunities to understand more accurately the situation among attraction and retention of international talent in Sweden. This report serves as a direct sequel of these findings and acts as the first of its kind under this umbrella to conduct an international comparison across selected European countries.

The decision to expand the study on an international level serves two main purposes. Firstly, this provides a better understanding of the identified challenges and opportunities in a comparison manner. Secondly, the collaborative platform of European wide entities is a desired concrete step within Switch to Sweden in moving from recommendations to action serving to support mobility with Europe rather than a competitive war on talent across Europe.



Partnership

Linköping Science Park

Linköping Science Park is a world-class innovation hotspot – with 14,000 brilliant minds and more than 600 companies inspiring Linköping – and the globe – with technology, services, and an explorative mindset. It is the home of leading tech companies such as Sectra, IFS, and Qualcomm, as well as pioneering startups & scaleups like Worldish, XMReality, and Nano Textile Solutions. It is a place where businesses grow and break frontiers in close collaboration with academia and talents.

European Talent Mobility Forum

Orchestrated by Future Place Leadership, eleven leading European entities in regional talent attraction and retention have formed an alliance dedicated to go above and beyond in welcoming international talent and increasing mobility between regions. The Forum consists of Berlin Partner, Bizkaia Talent, Brainport Development, Copenhagen Capacity, International Citizen Hub Lund, Move to Gothenburg, TalentScotland, Turku Business Region, Work in Estonia, The Oslo Region Alliance, and ART-ER Attractiveness Research Territory of Emilia-Romagna.

Switch to Sweden

Switch to Sweden is a national program funded by Vinnova and driven by Linköping Science Park. The goal of the program is to increase the number of qualified matches between international academic talents in Sweden and recruiting companies. This is done through a facilitation process between key actors in academia, international students, and Swedish companies.

Future Place Leadership

Future Place Leadership is a data-led agency that empowers places – cities, regions, and countries – to attract and develop people and businesses. Headquartered in Stockholm, the company is based on Nordic values of co-creation, trust, and collaboration serving clients in the public and private sectors across most European markets with a remote team based in North America, Europe, Africa, and Asia.

Vinnova

Vinnova is Sweden's innovation agency. They help to build Sweden's innovation capacity, contributing to sustainable growth. Their vision is that Sweden is an innovative force in a sustainable world.

Target group & target markets

This report is intended for decision makers and project managers within talent attraction for places on a government, regional, and city (municipality) level across Europe. In addition, it serves as a great tool for not only companies and universities seeking directly to attract and retain international talents, but also for a large portfolio of key stakeholders ranging from science parks to chambers of commerce, clusters, startup hubs, and other entities acting as intermediaries between international talent and employers.

The main target group for the data collection has been two-fold:

1. **International master's, doctoral students, and working professionals primarily within Science, Technology, Engineering, and Mathematics (STEM) fields, who are already in Europe having relocated from another country.**
2. **Knowledge-intensive companies in Europe who either employ or are interested in employing international talent.**

The target markets for the outreach to gather responses have been defined as: Denmark, Sweden, Norway, Finland, Germany, The Netherlands, Estonia, Spain (incl. Basque Country), and Scotland. The target markets have been chosen partly to secure a relevant Nordic and European comparison benchmark as 2.0 to the initial Swedish study as well as a decision to focus on countries with strong efforts and collaborative across border commitment in the business of places and talent rather than geographical priorities. Meanwhile the focus of STEM is directly aligned to labor market needs.



Acknowledgments

We would like to thank in particular the pioneers in talent attraction and retention for places, who have provided their expertise and commitment to work together on talent mobility across Europe in this project, and in the process providing unmeasurable input to define the survey questions, secure data gathering, guide the analysis and form the recommendations: Rouven Sperling & Burkhard Volbracht, Berlin Partner; Linda Spence & Kerry McHugh, TalentScotland, Lisa Buchan, The Scottish Government; Ivan Jimenez, Bizkaia Talent; Leonardo Ortega, Work In Estonia; Mari Strømsvåg, Oslo Region Alliance; Merete Sandager, Copenhagen Capacity; Niklas Delersjö, Move to Gothenburg; Regina Ainla, Business Finland; Thomas van Waesberge & Nicole Zweetsloot; Brainport Development.

Furthermore, this project would not have been possible without the funding from Vinnova. We warmly thank them for their support and collaboration.

Linköping, December 2023
Linköping Science Park & Future Place
Leadership

2. Executive summary

Executive summary

The International Talent Map is a data driven benchmark across selected European countries seeking to explore drivers and challenges regarding attracting and retaining international talent for places, employers, and key stakeholders.

Responses from students, working professionals, and companies have been primarily collected from: Denmark, Sweden, Norway, Finland, Germany, The Netherlands, Estonia, Spain (incl. Basque Country), and Scotland. The target markets have been chosen partly to secure a relevant Nordic and European comparison benchmark as 2.0 to the initial Swedish study as well as a decision to focus on countries with strong efforts and collaborative across border commitment in the business of places and talent rather than geographical priorities.

From a company perspective, they see competencies as an important managerial challenge, they forecast that recruitment only will be more difficult in the next few years, and should be perceived as half the journey, as retention is also a significant concern. Companies surveyed also claim to be open to people of different backgrounds and cultures, while also being positive about recruiting international employees.

Yet, companies are still not knowledgeable enough about how to work with international skills. And maybe the hardship of the paperwork keeps them from going all in. Specifically, companies themselves acknowledge they need help and list legal complexities such as visas and work permits, finding talent, and understanding recruitment as to where they would like support. This corresponds well to what the companies also state as the main barriers in hiring competencies from abroad: long processing time for work permits, language challenges, and cultural challenges in that order.

**In total this
report is based on data
from 2600+ global talents
living all over Europe and
300+ European based
companies.**

Looking towards international relocation, the candidates themselves, the so-called international talent, seem in general to be satisfied with their experience in their new country. And while the actual settling-in experience is not smooth sailing, it could be worse. From the data we also see that relevant work experience does leave an international student with a higher perception that good opportunities and support are available to start and grow a career in the new country and slightly higher perception that good career opportunities for internationals like themselves exist in the new country, while also being slightly more positive about making new friends. It does not however change how welcome they feel in the country.

Across the participating countries, it appears that international talents overall have the highest satisfaction with the experience in Scotland and Spain and the least in Norway and Germany. When looking closer at specific profiles, then exchange students outperform all other categories in satisfaction whereas, job seekers and bachelor students are least satisfied. The Netherlands and

Estonia provide the best settling-in experience, whereas Norway, Germany, and Finland are the worst countries to settle in according to the data.

The International Talent Map also introduces a Mobility Attractiveness Index for the partner countries. This index represents the percentage of non-native respondents expressing interest in living and working in each listed partner country of the survey (excluding international talents already living in the country). The top 3 countries here - suggesting a strong international appeal - are Germany, Spain, and Denmark.

In total for 50 selected countries worldwide, combining both students and professionals and which country they prefer, non-STEM respondents predominantly favor English-speaking countries, with the UK and Canada in the lead whereas for STEM respondents Sweden tops the priority while Germany and Denmark also make the top 5.

It is clear that related to relocation to another country, global talents have main drivers such as work-life balance, the possibility to develop a career, and then the specific job opportunity more so than financial incentives. Meanwhile, the main drivers for accepting a job/starting a business abroad start with professional growth followed by work-life balance.

Asked what the main barriers in deciding to live in another country are, “Long distance to family and friends” is the biggest concern, followed by an “Unfriendly/Not welcoming country” and “Lack of network and social life”. For obvious reasons, distance cannot be changed (maybe closer geographical target markets are a better starting point). However, working with being a welcoming society for newcomers and providing access to people and connections opens up an improved social life for non-locals and may help overcome the main perceived challenges.

Nevertheless, without facilitating work permits we get nowhere. In essence, the talent and company responses are a fair mirror of each other. It is a holistic 24-7 experience beyond the job. The place

matters and the right value proposition aligning with the key drivers needs to be in place. Not just in words but also in action after they arrive. Here places and employers must come together and fix the challenges both sides experience.

Exploring, the interplay between companies’ strategies and international talents’ expectation, this survey points to the need for an increased focus on integration, inclusive language practices, streamlined bureaucratic processes, career development, and a culturally attuned work-life balance, which if improved companies can more effectively meet the nuanced needs of their international workforce.

The most sought-after profiles by the companies in the survey (Tech and Engineers), are also the ones that are more satisfied with life in general in the new country and also rate the actual experience in settling into the new country as easier. Hence there seems to be less of a concern related to retention of these profiles if they can be identified and convinced to relocate in the first place.



5 key learnings

1. It is not about the place or the job, it is about both!

Work-life balance takes the lead as the main driver for deciding to live in another country, followed by the possibility of developing a career, and then the specific job opportunity. Consequently, places and employers need to help each other, providing the recipe for success that is the 24-7 user journey - a life far beyond the job opportunity.

2. Main barriers for companies from hiring international talents are long processing time for work permits, language challenges, and cultural challenges.

Many of the responding companies in the survey claim to be open to people of different backgrounds and culture and also being positive about recruiting international employees. Yet, there are barriers that stop them.

3. Main barriers in deciding to live in another country are, “Long distance to family and friends”, “Unfriendly/Not welcoming country” and “Lack of network and social life”.

Distance cannot be changed, but working with being a welcoming society for newcomers and providing access to people and connections opening up for an improved social life for non-locals will help overcome the main perceived challenges.

4. Companies need to increase their focus on integration, inclusive language practise and career development.

Many companies are still not knowledgeable enough about how to work with international skills. In theory many of the responding companies stated that it was not deemed as important if the candidates had a solid understanding of the local language. Yet, in practice the international talents often must speak the local language or the companies do not feel strong enough in English as a common language.

5. Places/international welcome centers can be part of the solution.

Working with being a welcoming society for newcomers and providing access to people and connections opening up for an improved social life for non-locals will help overcome the main perceived challenges by international talents. There is also a need to find solutions to be able to provide support to overcome the perceived barriers from companies like long processing time for work permits, language challenges, and cultural challenges.

3. Introduction: Talent attraction and retention for places

Introduction: Talent attraction and retention for places

National and regional talent attraction management is becoming a key driver for innovation and growth. As companies struggle to identify and recruit the talent they need locally, they increasingly find the need to look not just regionally but internationally as well. However, the further away that they go to attract either the best and brightest in a certain field (the expert) or the more generic skills in demand everywhere (e.g., tech and engineering), the less known they are as corporate brands and the more they need to rely on a place brand. Consequently, the competition for international talent is massive, and many regional and national economic development boards have either entered this field or are in the process of doing so. In other words: Access to skills has become a key competitive advantage for places within economic development. And the competition for the best and the brightest is no longer only employer-led.

In addition, we live in unprecedented times, where places and employers need to adapt to a post-pandemic world or changes in the industry related to the way we work and from where we work, while considering the lifestyle and career preferences of the current and future workforce that are different from yesteryear.



Framework conditions to attract and retain international talent

In the last decade plus, many comparable countries in Europe and other parts of the world have taken comprehensive steps to actively attract and receive skilled labor. Ambitious objectives have been set from a national level, at the same time as significant resources are invested regionally and locally in coordinated and systematic efforts to market the country and the country's employers towards an international workforce and facilitate their establishment in the country after arrival.

Simply put: To be competitive in the global arena, governments have realized the need to actively create an attractive environment by reducing bureaucratic hurdles, offering tax incentives, and ensuring access to a skilled and adaptable workforce.

Still, the institutional setup and migration system across the participating countries vary significantly. Some do have a governmental strategy and significant resources behind the initiatives, while others appear to be acting more from a bottom-up local or regional needs basis. In certain countries, a regional vision is being developed as the backbone of initiatives in support of the nationwide strategy.



Does the country have a national strategy on international talent attraction and retention?

YES

Scotland

The Netherlands

Estonia

Finland

The Basque Country
within Spain

NO

Sweden

Denmark

Norway

Germany

- ❖ Talent Boost in Finland as the national programme to attract international talent and promote their immigration to and integration in Finland is one that industry peers often refer to.
- ❖ From the more bottom up local/regional approach, the project-based large nationwide partnership State of Denmark is worth a mention with more than 36 partners connecting the international talent ecosystem targeting all aspects as frame conditions, attraction, onboarding, and retaining international talent.
- ❖ A country like Germany may not have an official strategy, but currently are actively discussing a new Skilled Immigration Act, which is the central element of the German Government to make it easier to bring international talent from third countries to Germany.
- ❖ The Norwegian government published a white paper with suggestions for skilled labor support, and a strategy for better inclusion is in the works.
- ❖ In Sweden, at the moment most activities are driven by regions and cities. But soon things will happen regarding national strategy for talent attraction with a few national authorities taking initiatives.



Regardless of an existing strategy in place in the public domain, a common denominator across most markets is to address the effects of an aging population and the skills shortages of certain sectors with a commitment to explore how to support individuals and businesses to attract and retain talent. Work permits, fast track for critical in-demand skills, and access to housing in certain countries are of a more critical nature that is attempted to be dealt with.

Other interesting topics and areas of development across the selected countries include how international skills feed into the green transition, the more general attitude and change towards more diversity as a growth booster, and employers' mentality to hire internationally. Also, addressing immigration laws and finding the balance between migration of skilled workers and refugees, where part of the latter is almost part of the former, is mentioned by the project partners.

Or as summarized on behalf of most of the countries, the Danish case states: Denmark is still not perceived by global talents as an attractive talent destination. Thus, challenges besides being an unknown career destination also reflect cultural integration, aligning qualifications, and language barriers as well as the companies' level of maturity when it comes to hiring international talent.

4. Aim of the study

Aim of the study

The goal of this study is to provide tangible recommendations on how places and employers can improve their capacity and efforts towards attraction and retention of international talent.

Furthermore, the aspiration is to utilize the data findings to identify ways of collaborating across borders within Europe to provide state-of-the-art solutions to benefit directly global talents and the wider net of actors in the ecosystem.

Specifically, the aim of the talent survey is to:

- ❖ Define what opportunities global talent sees when moving to another country and what the main barriers are to doing so.
- ❖ Explore what challenges global talent experiences in the lifecycle from moving to settling in and deciding to stay long-term.
- ❖ Unfold the decision-making factors for coming and leaving.
- ❖ Recognize the help needed by the target group to succeed in their new country.

Specifically, the aim of the company survey is to:

- ❖ Identify how important is the (international) talent agenda.
- ❖ Explore their recruitment needs.
- ❖ Establish the opportunities and obstacles they see with recruiting international talents.
- ❖ Recognize the help needed by the target group.

Methodology and data collection

The initial questionnaire was built as an improved version of the initial Switch to Sweden Talent Map Report. In addition, Future Place Leadership provided guidance on the European context of best practices within such “Expat/Talent” surveys, while partners from all participating countries provided structural feedback and localization needs.

The data collection period was May 2023 through September 2023 with SurveyMonkey as the survey tool.

Respondents were secured primarily by organic outreach through partner and stakeholder engagement, newsletters, and social media promotion. A small budget was activated for paid promotion on social media as well.



5. Basic demographics: Who are the respondents

Basic demographics

Who are the respondents?

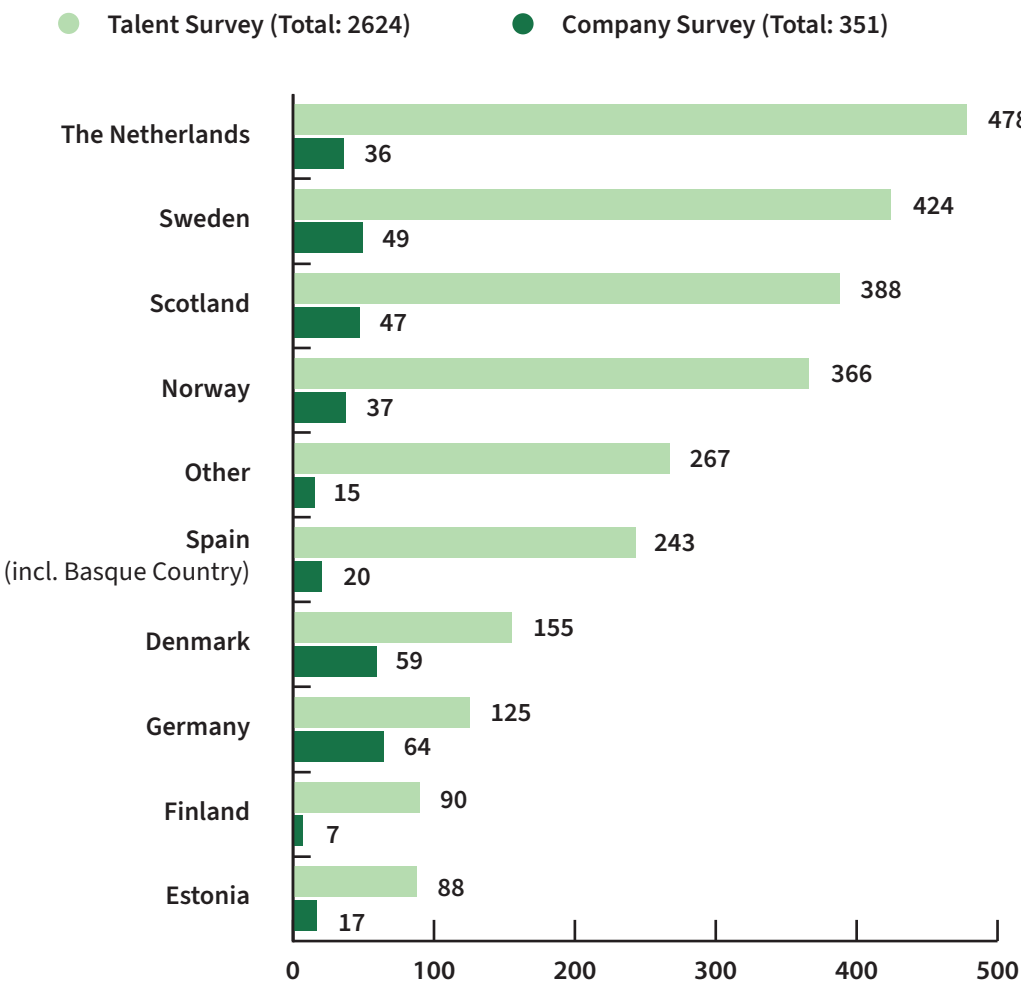
In total, the survey received responses from 2624 global talents and 351 companies mainly living and based in Europe.

Talent respondents

Close to 200 different nationalities took the survey with India, Spain, Nigeria, United States, and Germany as the most frequent passport holders.



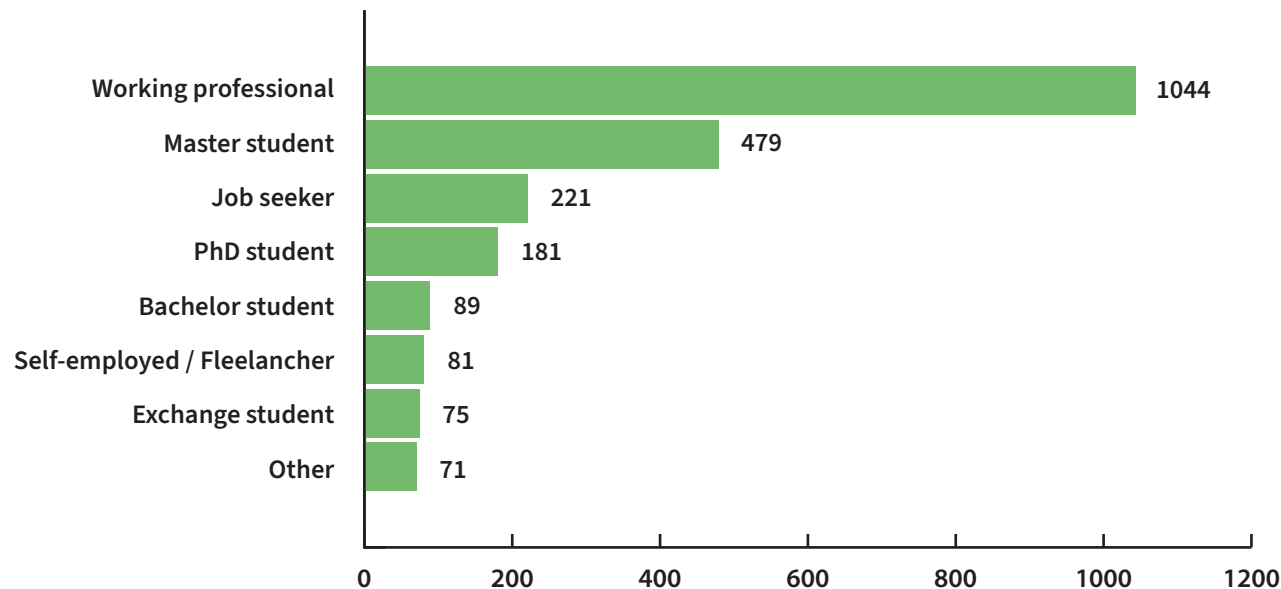
RESPONDENTS PER COUNTRY



*Other categories include Rest of Europe, North America, South America, Africa, the Middle East, and Asia.

A vast proportion (nearly half of the respondents) are working professionals, with master students (21%) the second biggest group, and actual job seekers (10%) coming third.

PRIMARY STATUS OF RESPONDENTS



Looking closer at the student population of the survey respondents, (36%) responded to STEM (Science, Technology, Engineering & Math), (21%) Business Administration and Economy, and (8%) Social and Behavioral Science as being their most recent field or degree program of academic focus.

With regards to the working professionals, engineers are the most frequent respondents encompassing (19%) with researchers the second largest with (18%).



Interesting facts about the talent population

- ❖ 82% were born between 1980 and 2000.
- ❖ Gender split: 54% female and 45% male (rest prefer not to say/non-binary, etc.).
- ❖ More than 6 out of 10 already spent a minimum of 6 months abroad elsewhere.
- ❖ Just below 30 % have spent less than a year in their current country, while just above 30% have been there for 5+ years.
- ❖ More than half were single when they relocated (54%), 27% came with a partner/spouse, 17% with a partner/spouse and kid(s), and below 2% came as single with kids.
- ❖ Just short of 50% of the students claim to have gained relevant work experience while in the country.
- ❖ Of the working professional's subpopulation, 40% of the respondents have 10+ years of professional experience, 25% have 6-10 years and 35% have 0 to 5 years of experience.



Company respondents

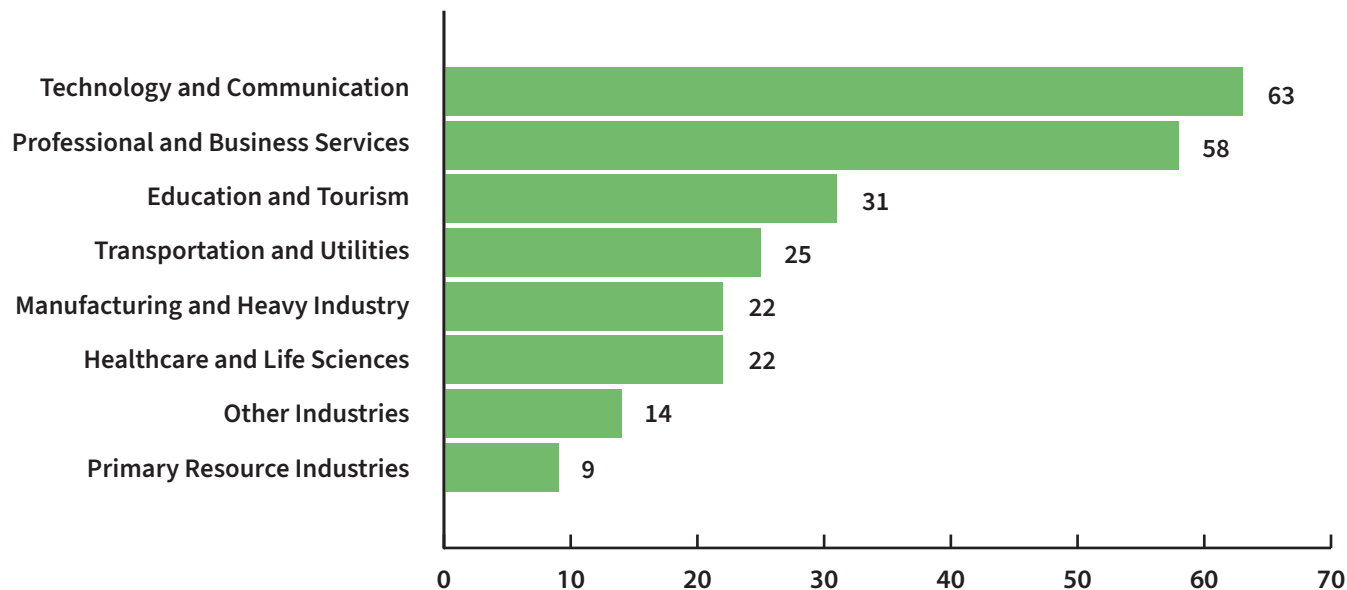
The company representatives taking the survey are mostly in HR (42%) and Leadership (23%) roles.

They work for companies that range from the self-employed to the 10000+ employees' size with the top 3 groupings being 11-50 employees (23%), 51-200 (22%), and 1001-5000 (14%).

Furthermore, the companies range from newly established to 20+ years in operation.

In terms of industry segments, the company presents a wide portfolio of business areas, with Technology & Communication as the largest subgroup followed by Professional and Business Services.

PRIMARY INDUSTRY OF COMPANIES

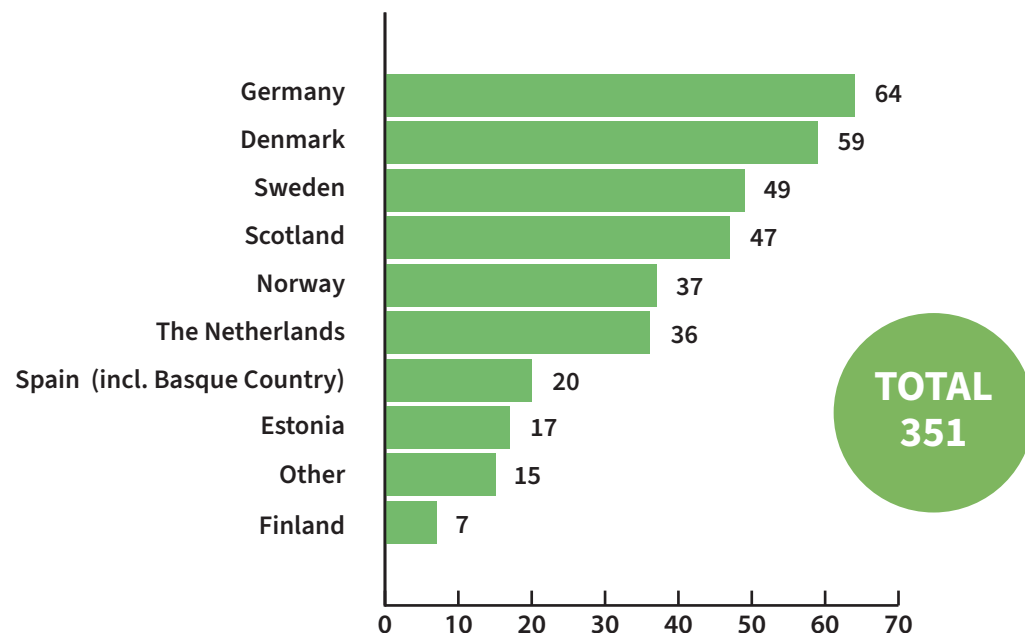


The companies in the survey have a high level of international operations as 88% have international customers, 84% international suppliers, and 61% have international subsidiaries.

They employ on average 25 international nationalities, although for an individual company in the survey, the range is wide from 1 to 100 different nationalities.

The 351 company respondents are demographically divided with most responses from Germany, Denmark, Sweden, and Scotland with fewest from Finland and Spain incl. Basque Country. Due to variations in response rates across countries, this report abstains from conducting a direct country-level comparison regarding company responses.

COMPANY RESPONDENTS PER COUNTRY



6. Key insights from the talent survey



Key insights from the talent survey

The customer journey: satisfaction level

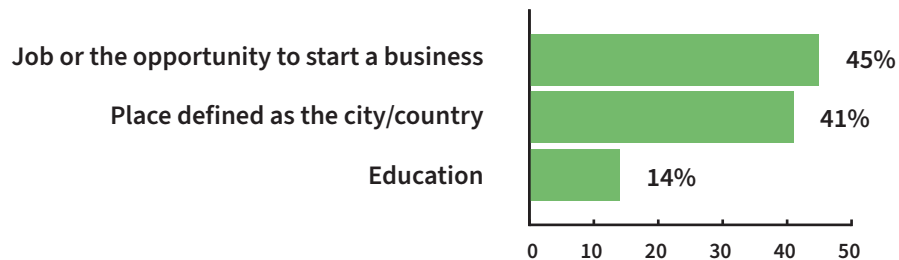
The data shows 3 statements on the general satisfaction level of the international talent related to their experience in their “home away from home”:

- ❖ Loving it may be a slight exaggeration, but the international talents are satisfied with their experience in their new country (Average score is 7 on a scale from 1 to 10 with 1 being “I cannot wait to leave” and 10 “being I love it here”).
- ❖ The settling-in experience is not smooth sailing but could be worse. (Average score is 6 on a scale from 1 to 10 with 1 being “very hard” and 10 being “very easy”).
- ❖ International students want (mostly) to stay after graduation (Average score is 7 on a scale of 1 to 10 with 1 being “low” and 10 being “high” on the interest of staying to work after finishing academic achievements).

When looking closer at specific profiles, exchange students outperform all other categories in satisfaction, whereas job seekers and bachelor students are least satisfied. Related to the actual settling-in experience, again, job seekers and bachelors have the worst experience.

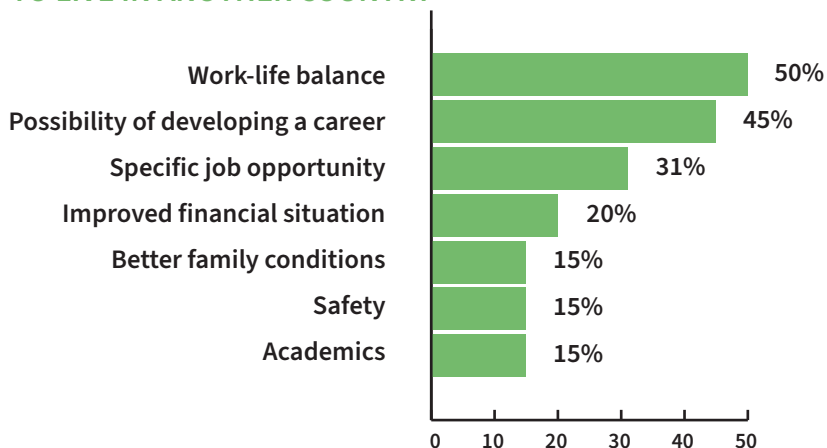
Drivers and Barriers in relocation to another country

WHAT MATTERS MOST WHEN CHOOSING TO LIVE IN ANOTHER COUNTRY

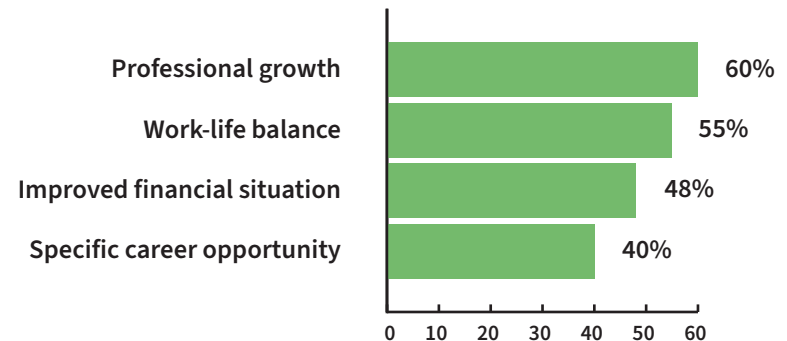


Exchange students and self-employed value the place the most of the different profile types in the survey. The data also tells us that the more professional experience you have, the more the job matters over the place.

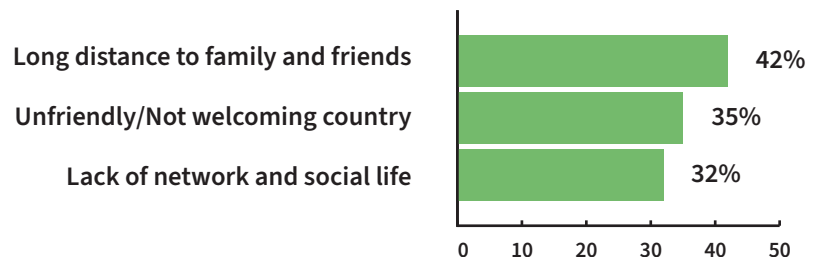
GENERAL MAIN DRIVERS FOR DECIDING TO LIVE IN ANOTHER COUNTRY



MAIN DRIVERS FOR ACCEPTING A JOB/STARTING A BUSINESS ABROAD



MAIN BARRIERS TO CHOOSING TO LIVE IN ANOTHER COUNTRY



“Long distance to friends” is a significant barrier for talents that have from 6 to 10 years of professional experience, while “Lack of network” is not a concern for talents that have 10+ years of experience. This subgroup, on the contrary, has an “Unfriendly country” as a relatively higher concern.

Should I stay or should I go?

In general terms, the respondents point to these key factors to evaluate whether they want to stay in the country (in priority order):

1. **Career opportunities**
2. **Work life balance**
3. **Higher level of social stability and security**
4. **Opportunities for my family**
5. **Lifestyle**

Note that Financial incentives is “only” in 6th place.

When asked what specifically the challenges in staying long term in the country are, the top 3 issues highlighted by the respondents are (mostly student answers):

1. **Not being eligible for a residence permit, or the application process is too complicated (long processing times, unpredictable decisions, and difficult-to-understand rules (24%).**
2. **Not having contacts with potential local employers (18%).**
3. **Not speaking the native language (14%).**





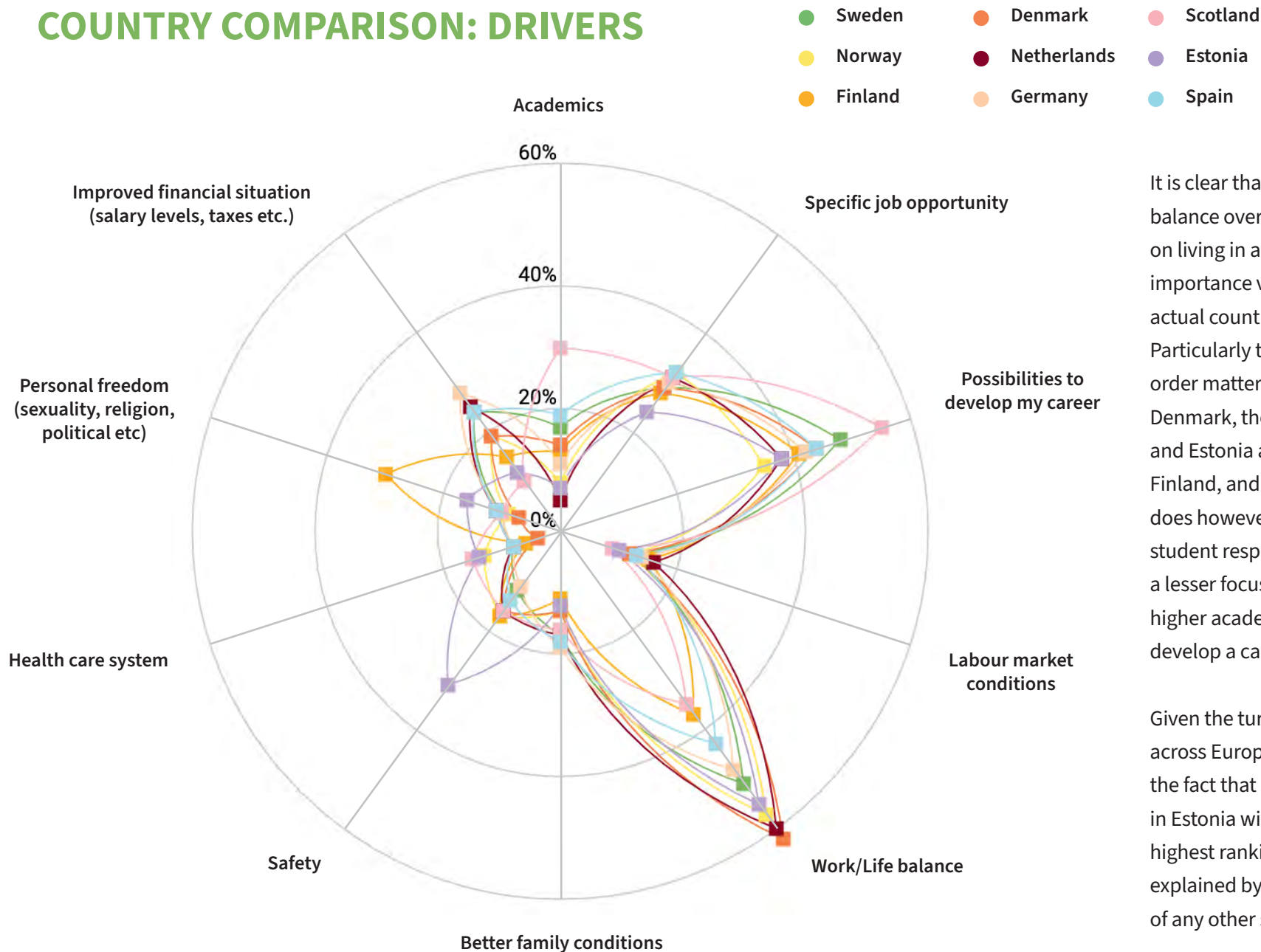
Country comparison

Amongst the 9 partner countries, overall international talents have the highest satisfaction with the experience of living in Scotland and Spain and the least satisfaction with the living experience in Norway and Germany.

The Netherlands and Estonia provide the best settling-in experience, whereas Norway, Germany, and Finland are the worst countries to settle in to according to the data.*

*Note: Responses from Finland and Estonia are much lower than other countries and hence statistically more skewed towards the opinions of a smaller sample.

COUNTRY COMPARISON: DRIVERS



It is clear that as much as work-life balance overall is a main driver to decide on living in another country, the relative importance varies a lot depending on the actual country people have relocated to. Particularly the importance in significant order matters to internationals in Denmark, the Netherlands, Norway, and Estonia and much less in Scotland, Finland, and Spain. Scotland for example does however have a high proportion of student respondents, which may explain a lesser focus on work-life balance and higher academic drive and possibility to develop a career than other countries.

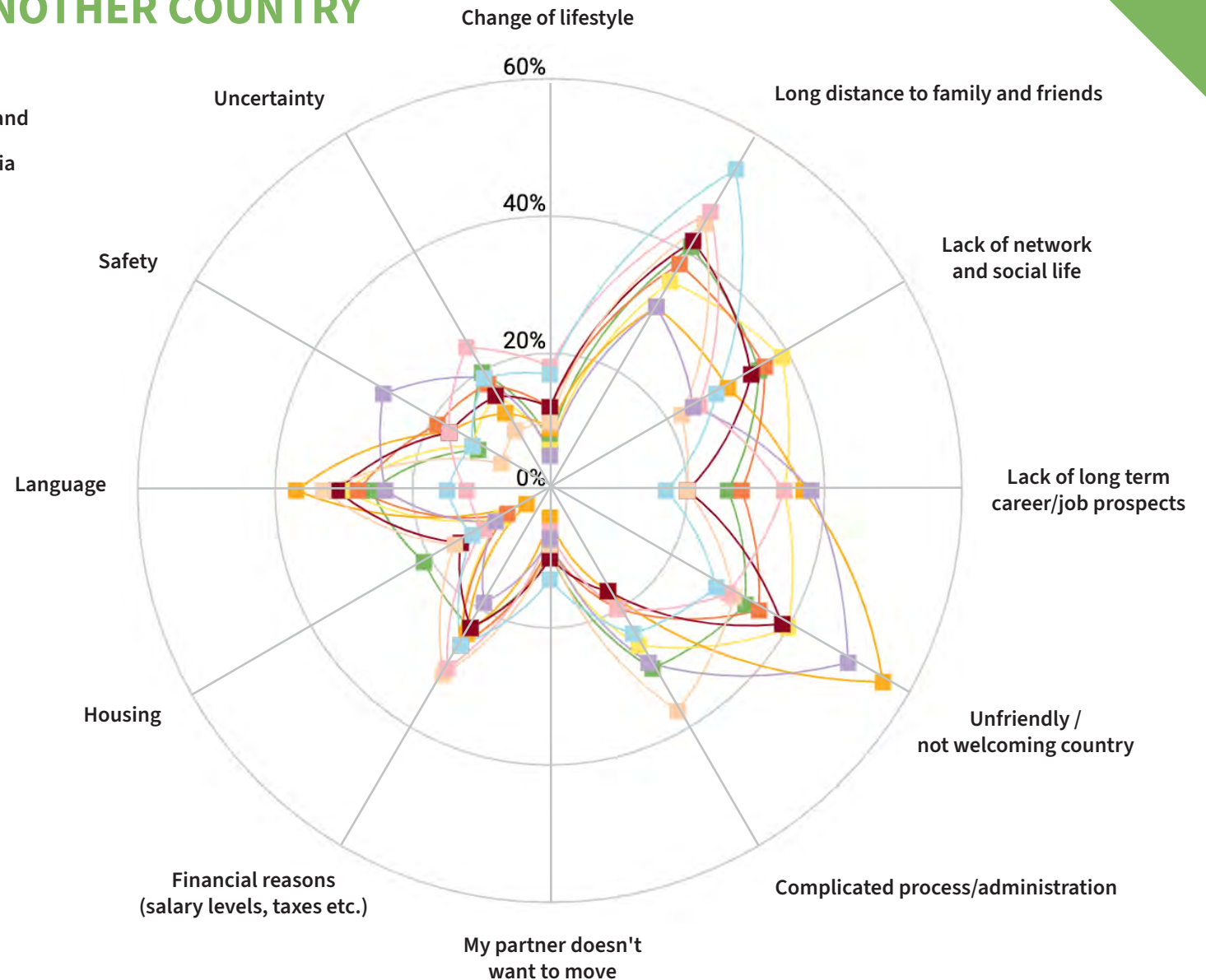
Given the turmoil of the geopolitical issues across Europe and the war in Ukraine, the fact that safety is a much bigger issue in Estonia with Finland being the second highest ranking on that dimension can be explained by the closer proximity to Russia of any other survey countries.

COUNTRY COMPARISON: BARRIERS - CHOOSING TO LIVE IN ANOTHER COUNTRY



Regarding the main barrier defined as “Long distance to family and friends”, Spain does stand out significantly as having this topic being an issue. On the other hand, it is a very limited barrier in Estonia.

The second main barrier - the unfriendly country - matters a lot more to global talents in Finland and Estonia and much less on the other end to the target group living in Spain, Scotland, and Germany.



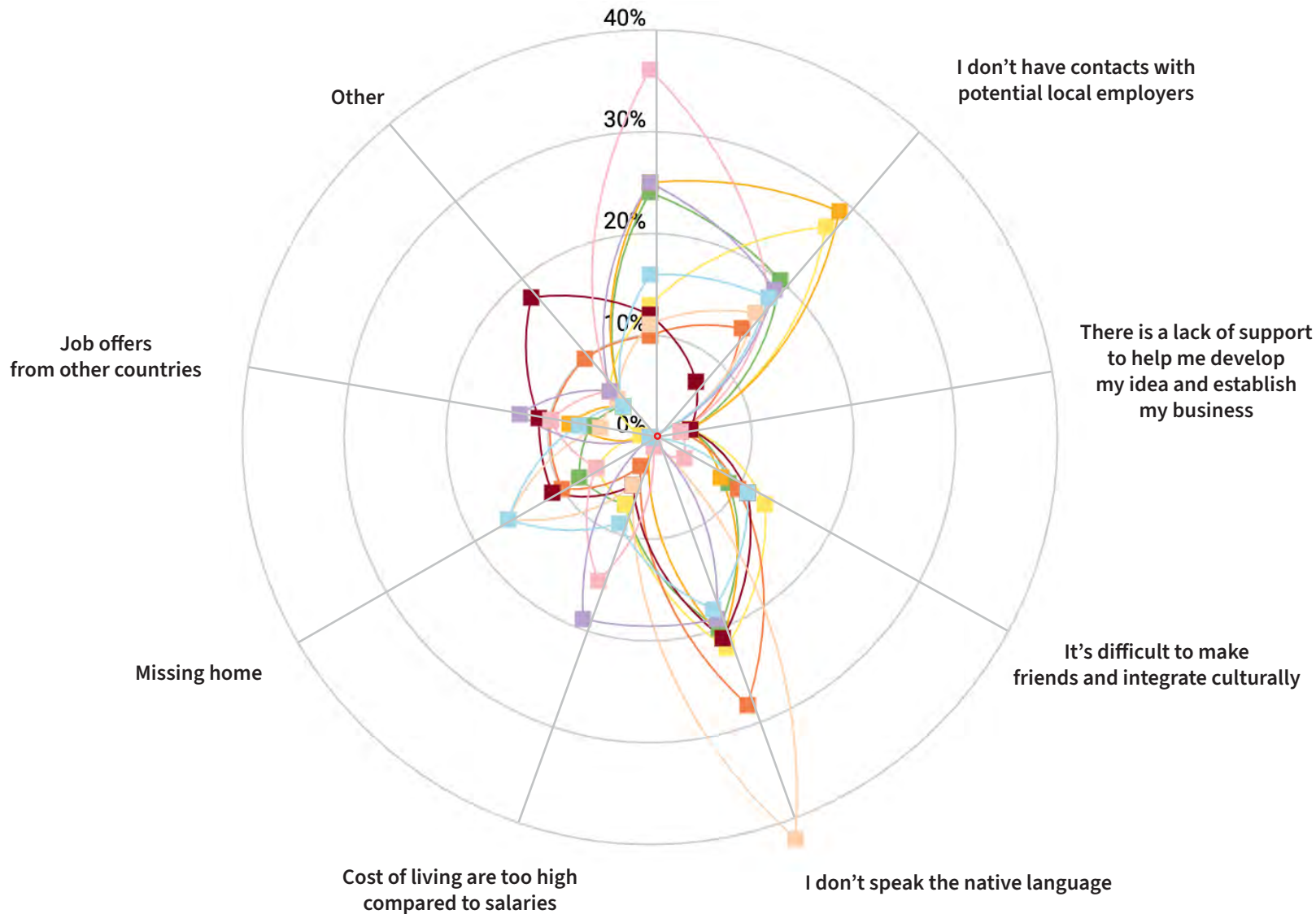
COUNTRY COMPARISON: LONG TERM BARRIERS

I am not eligible for a residence permit, or the application process is too complicated

Sweden
Norway
Finland

Denmark
Netherlands
Germany

Scotland
Estonia
Spain



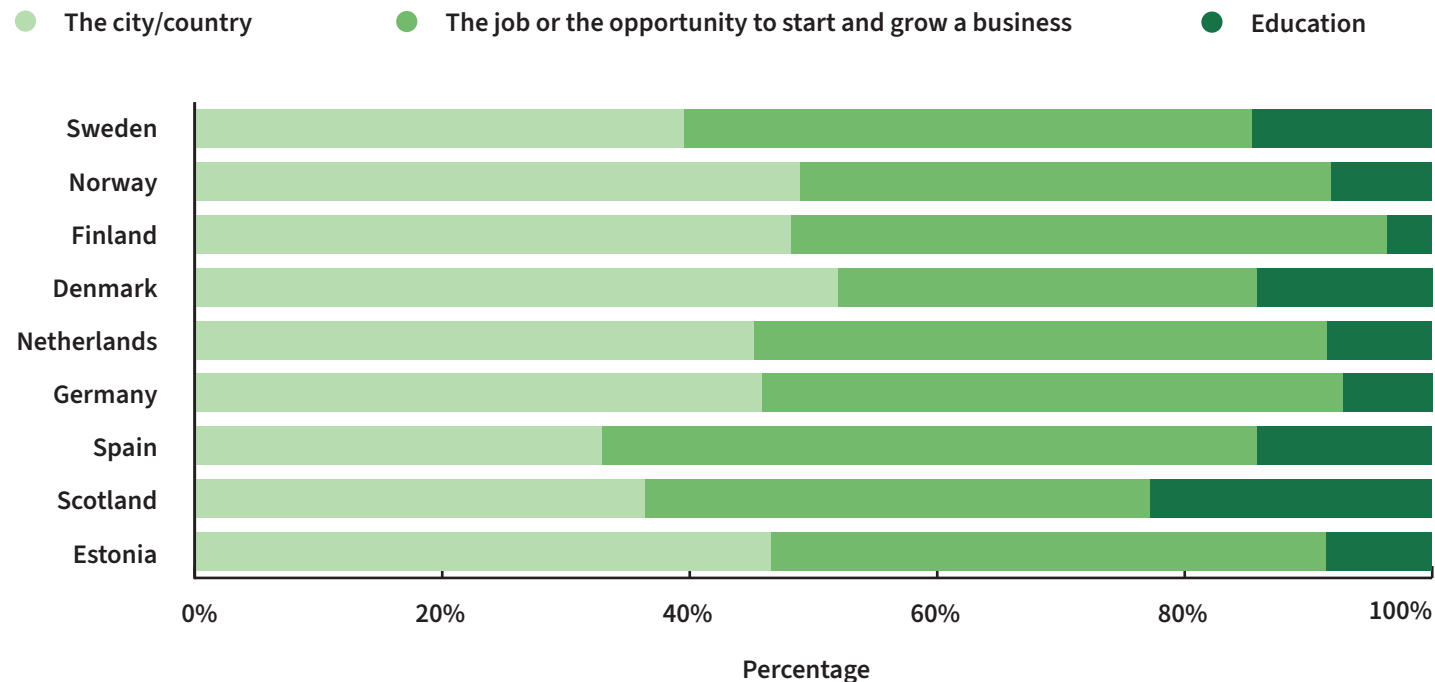
Taking the critical factors of deciding to stay more long term to a country level, the data tells us:

- ❖ Scotland, Estonia, and Sweden have the biggest challenges around residence permits and processing times.
- ❖ Contact with employers is more of an issue in Finland and in Norway, while the Netherlands is strong in this category.
- ❖ Germany stands out as a country where local language is perceived as needed, while Denmark also appears to have that issue more than others.

How important is the place?

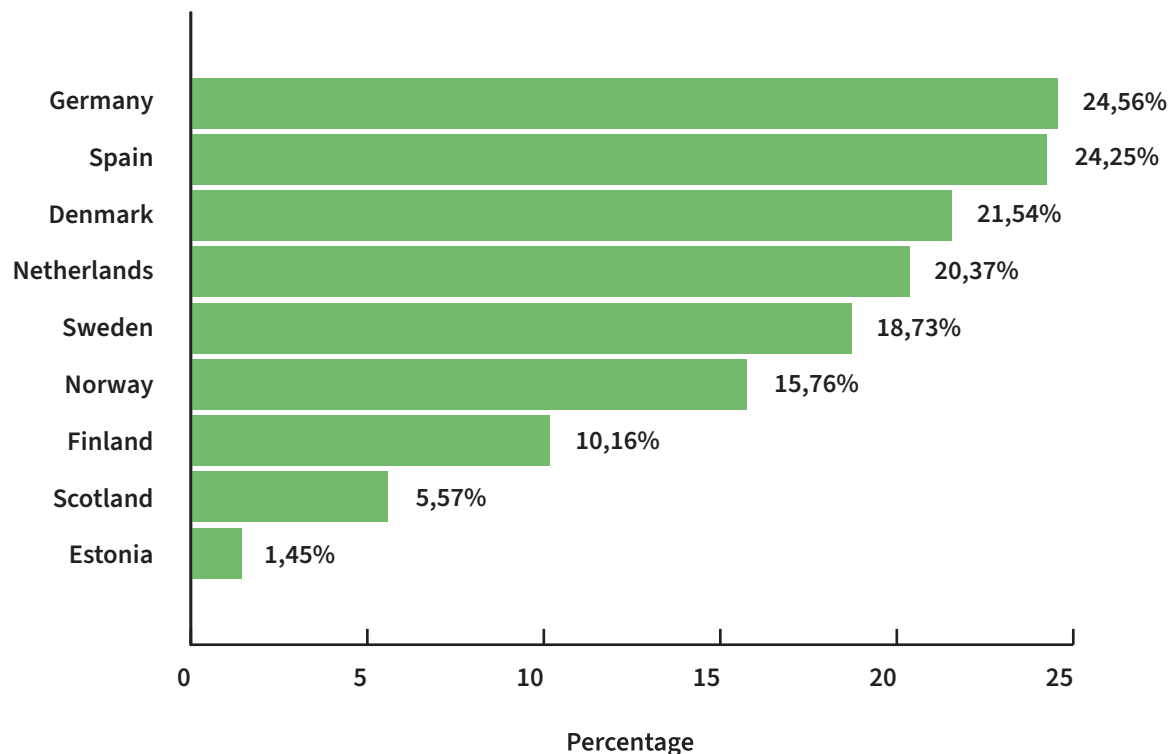
Denmark, Norway, Finland, and Estonia are the top countries in terms of choosing the place over job/education, but it is quite clear that the place matters regardless of the location. Although Sweden is lacking behind, it seems the Nordics to a certain degree have a stronger place value proposition that matters to the global workforce than the other countries.

DO PEOPLE MOVE FOR A CAREER OR FOR A PLACE?



Mobility Attractiveness Index for International Talent Map partner countries

In the survey we asked the talent respondents to select from a list of 50 countries, where would you consider to live and work? This index represents the percentage of non-native respondents expressing interest in living and working in each listed partner country of the survey (excluding international talents already living in the country). For instance, 24.56% of respondents considering moving countries are interested in Germany, highlighting its significant appeal as a destination for international mobility.



The percentages provide a clear indication of each country's relative attractiveness to potential international movers. Higher percentages, as seen for Germany, Spain, and Denmark, suggest a strong international appeal, potentially due to factors like economic opportunities, quality of life, and cultural richness. Lower percentages, such as for Estonia and Scotland*, indicate more specialized or niche appeal, possibly drawing interest for unique cultural or economic opportunities.

*Included here are only Scotland specific answers. The United Kingdom as a whole lands at number 1 in the top 50 country selection, with 611 out of 1924 answers, but the data does not allow to exclude respondents from the UK specifically. In short, Scotland is most likely more popular than shown here.

TENNAS FROM
IC



Focus area - Academics

In this section we look closer at statistical differences between master's students and Ph.D. students related to pursuing academic endeavors abroad, the main drivers to live in another country, and what would make them accept a job offer/start a business abroad. We also explore why students, in general, go abroad in the first place, and if having a relevant job in the new country impacts the experience of living there.

The primary reason to pursue academic endeavors abroad:

In relative comparison, PhDs value funding and scholarships, interesting education subjects, lifestyle and culture, and education in English significantly more than master students do. They in return focus on the ranking of the university, the opportunity to pursue a career abroad after education, and gaining international experience.

Main drivers for deciding to live in another country:

Master students prioritize much more the possibility of growing their career, specific job opportunities, and support for starting and growing a business than what is the case for PhDs. To the latter, softer elements such as personal freedom, work-life balance, and flat hierarchy stand out in relative comparison to master students.

Main drivers to accepting a job offer/starting a business abroad:

In comparison, here the conclusion is pretty straightforward: PhDs are looking for specific jobs, master students for professional growth.

Does a student job boost the experience?

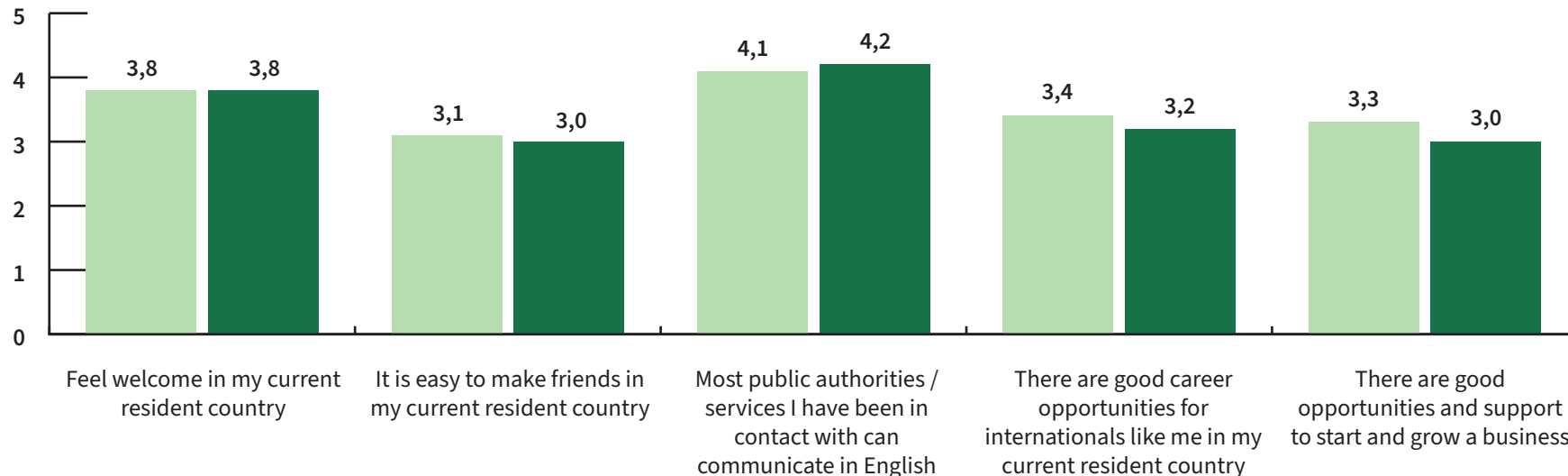
Of the surveyed students, (45%) have gained what they assess to be study relevant work experience in the new country through paid or unpaid internships, and part-time/ full-time positions.

What we see from the data is that relevant work experience does leave a student with a higher perception that good opportunities and support are available to start and grow a career in the new country and a slightly higher perception that good career opportunities for internationals like themselves exist in the new country while also being slightly more positive about making new friends. It does not however change how welcome they feel in the country.

DOES RELEVANT WORK EXPERIENCE MATTER?

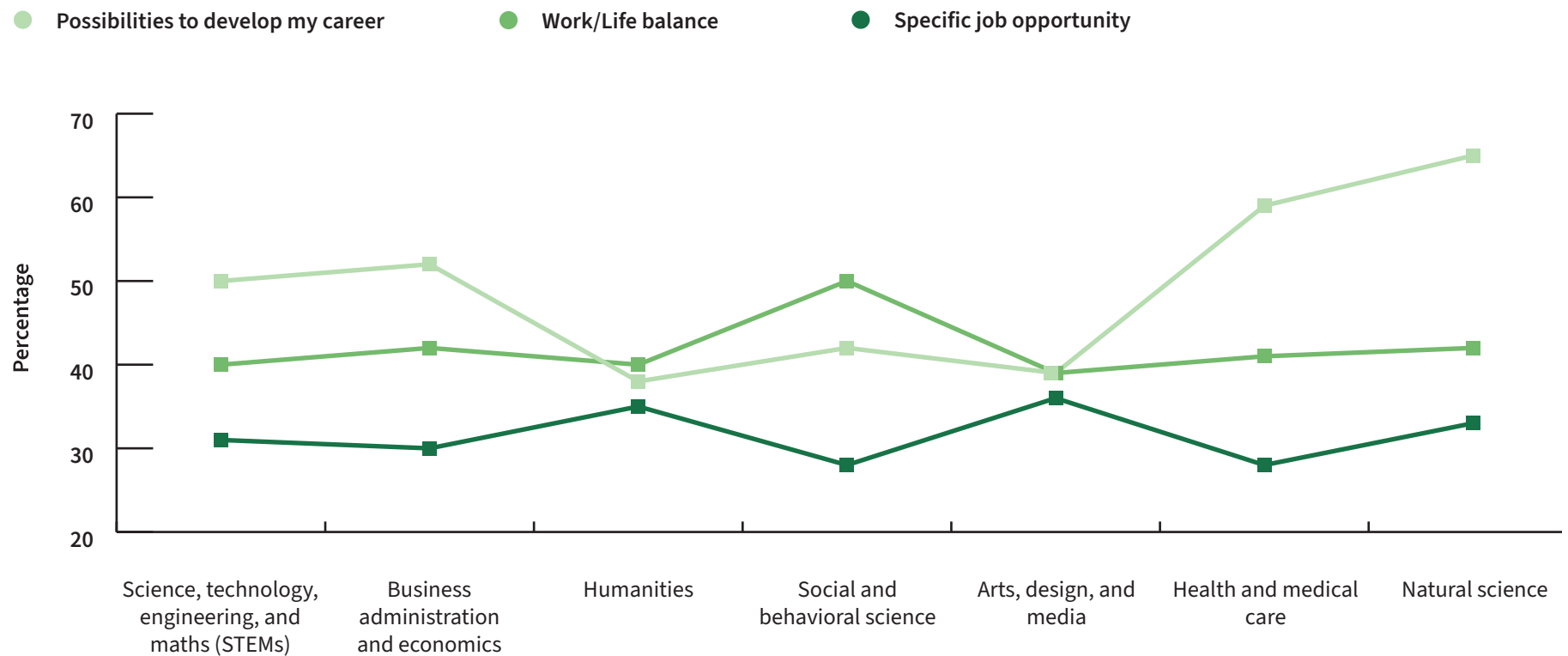
● Students with relevant work experience

● Students without relevant work experience



Why do students go abroad in the first place?

Asked what main drivers for deciding to live in another country are, it is noteworthy that students do not rate “Academics or Schools” as high importance. The top 3 reasons are in general centered around “Possibilities to develop my career”, “Work-life balance” and “Specific job opportunity” with, as the figure outlines, interesting differences in the priority of these depending on the type of study.



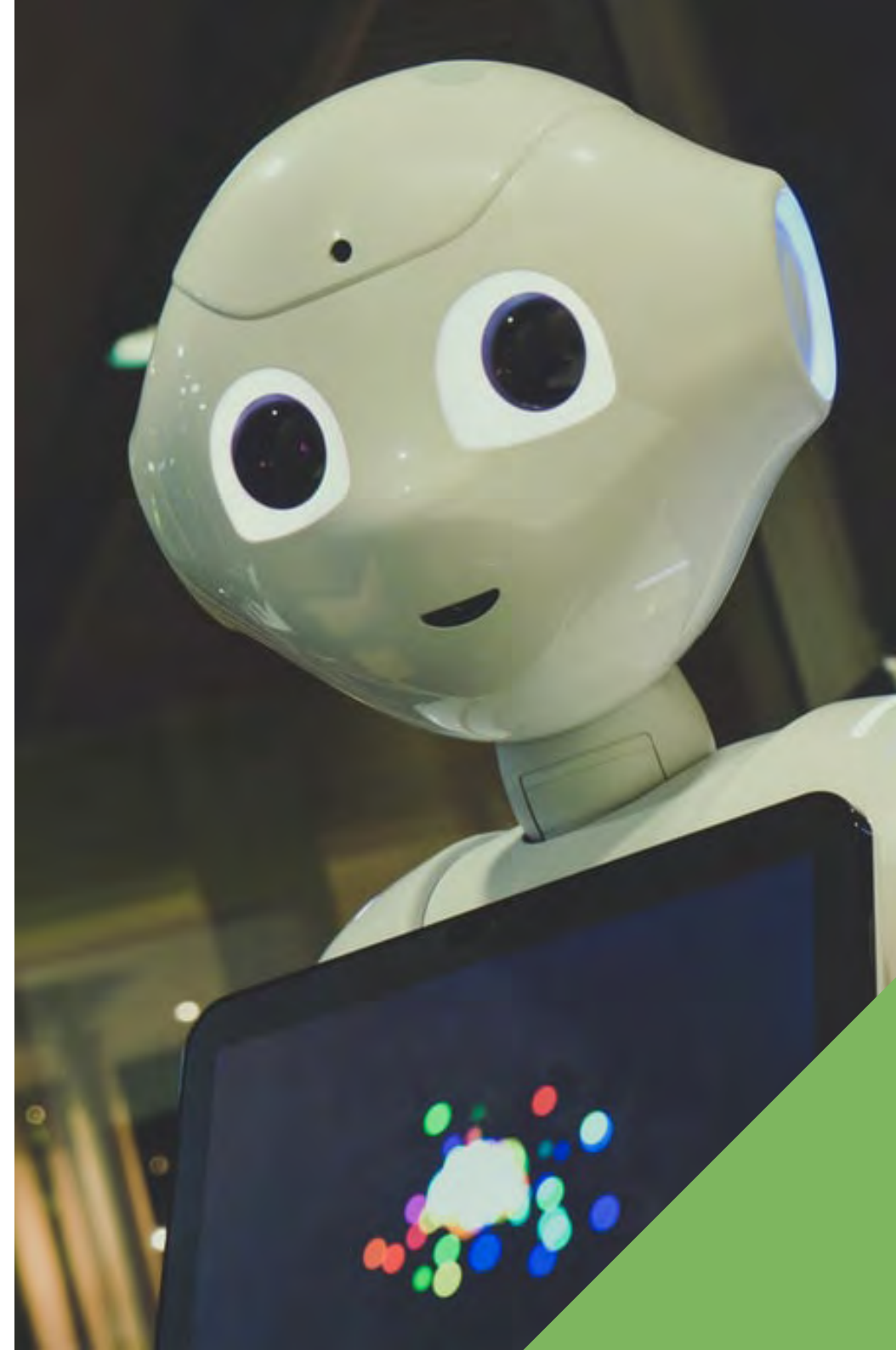
Focus area:

From STEM to gender and family status: what matters?

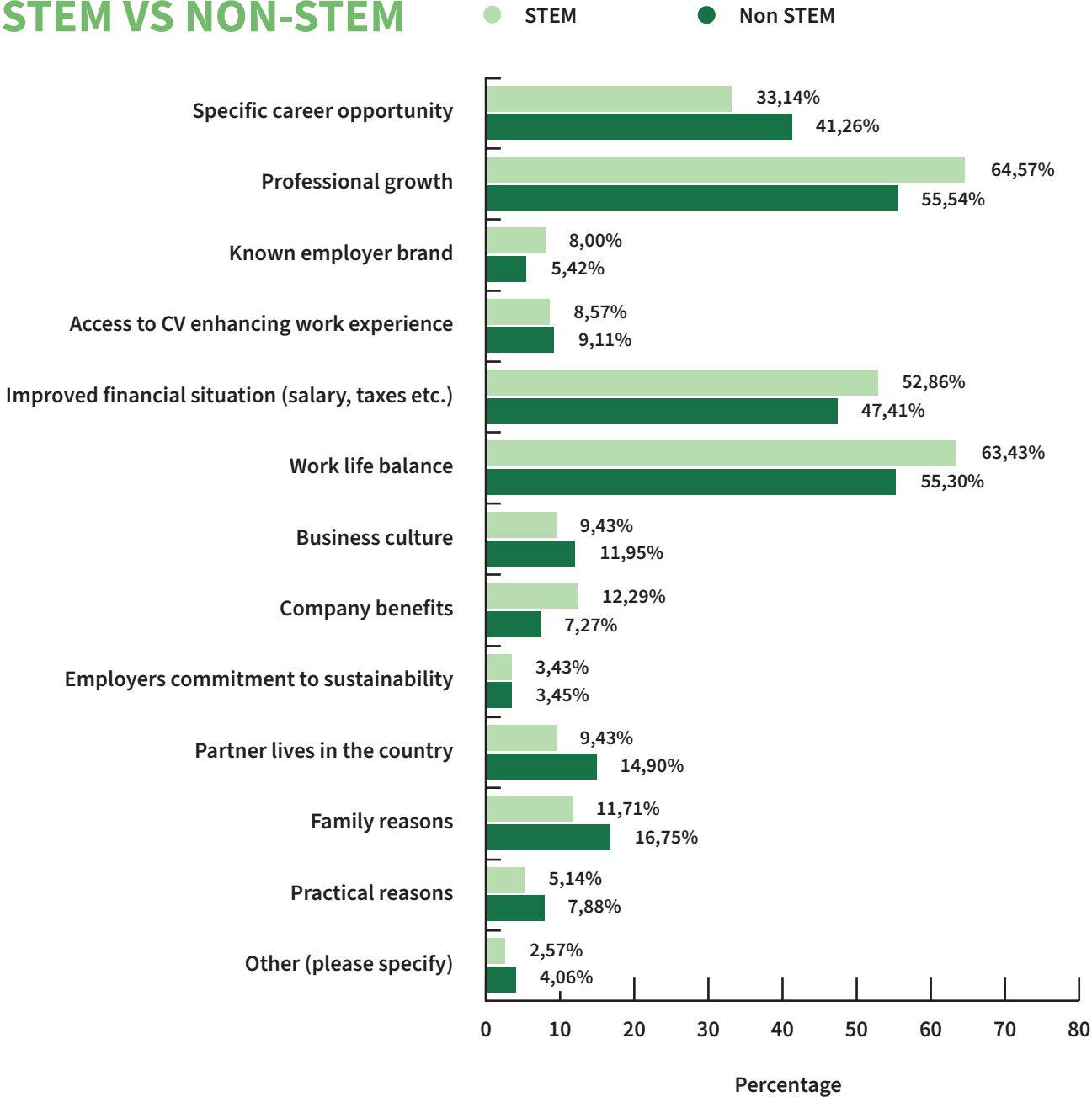
STEM vs. Non-STEM

The most sought-after profiles by the companies in the survey (IT and Engineers), are also the ones that are more satisfied with life in general in the new country (7.3 vs 7.0 on a 1 to 10 scale) and also rate the actual experience in settling into the new country you as easier (6.5 vs 6.1 on a 1 to 10 scale).

Speaking of this target group - the more STEM-related profiles - the data set also points to some interesting findings on the decision-making process (main drivers) to accept a job offer/starting a business abroad. “Professional growth” and “Work-life balance” are statistically much more important to STEM profiles than non-STEM, whereas “Specific career opportunities”, “Partner lives”, “Improved financial situation”, and “Family reasons” matter much more to non-STEM individuals.



STEM VS NON-STEM



When asked about the biggest challenges related to integration into the new country there are huge differences between STEM and non-STEM in two specific areas: Non-STEM find it much harder to get a job whereas housing is a much bigger problem for STEM individuals although the data gives no insights into why that is.

Which countries do STEM vs non-STEM prefer?

Combining both students and professionals and which country they prefer, non-STEM respondents predominantly favor English-speaking countries, with the UK and Canada in the lead and only one non-English native speaking country in the top 5 - literally with Sweden as number 5. For STEM respondents Sweden tops the priority while Germany and Denmark also make the top 5, illustrating the varied appeal of European countries to different demographic groups based on their career focus and interests.

Non-STEM Respondents' Top 5 Preferences:

1. UNITED KINGDOM
2. CANADA
3. SCOTLAND
4. UNITED STATES OF AMERICA
5. SWEDEN

STEM Respondents' Top 5 Preferences:

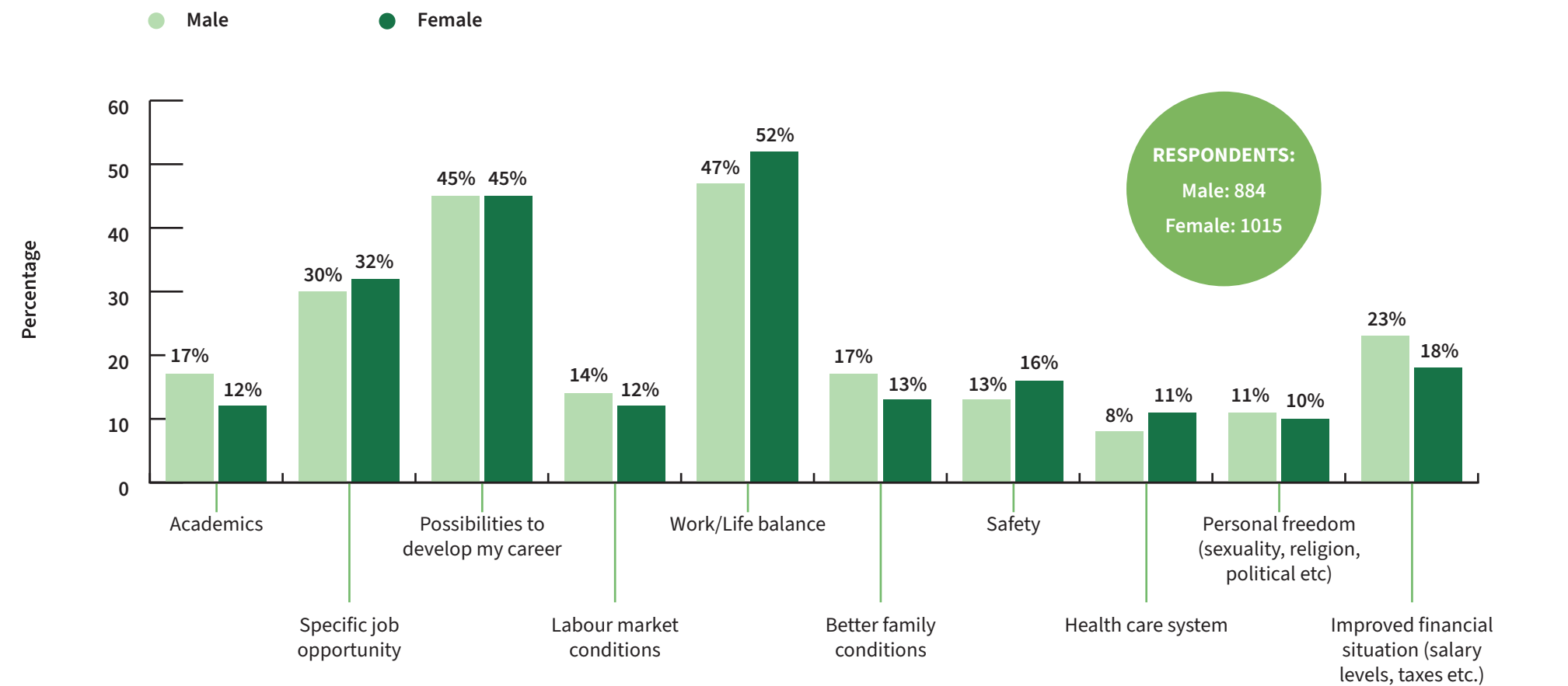
1. SWEDEN
2. UNITED KINGDOM
3. GERMANY
4. CANADA
5. DENMARK

Gender and family status

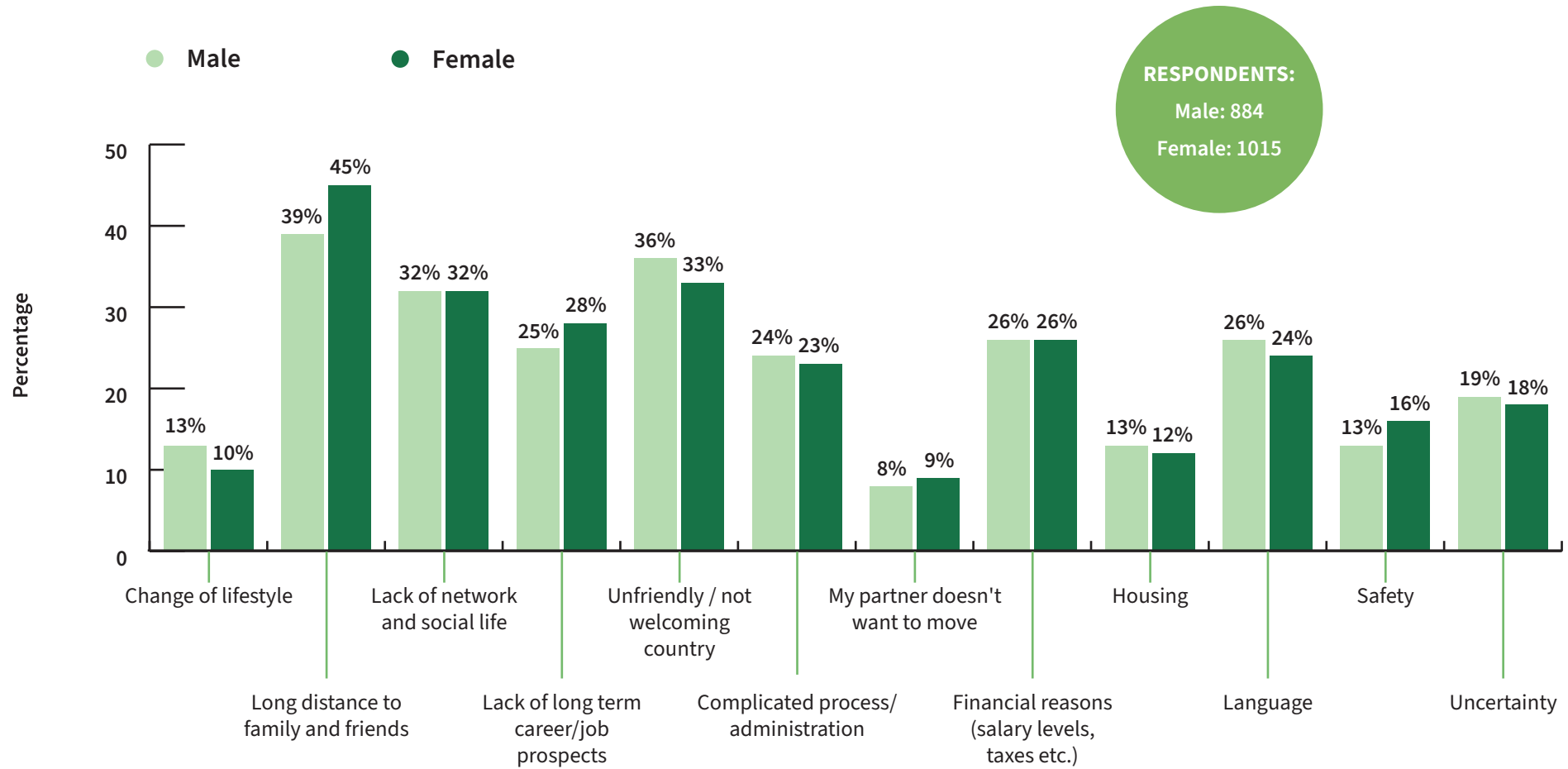
In general, the data set tells us that differences in drivers and barriers related to “moving to”, “accepting a job offer”, and “deciding to stay longer” are more significant between a single person vs. one moving/living with a family and then isolated gender male vs. female.

If we look at females vs. males the data confirms more stereotypical notions that for example work life balance is slightly more important to females than males with an improved financial situation more important to men. Furthermore, to females, “Long distance to family and friends”, “Safety and lack of long-term career/job prospects” are relatively speaking higher barriers in comparison to men. The more long-term focus on career/job can either be perceived as females having a different time perspective than males. Another classic challenge related to relocation is being a job for spouses which is a natural next step after the initial relocation and where females still often are the target group more so than men.

DRIVERS: GENDER

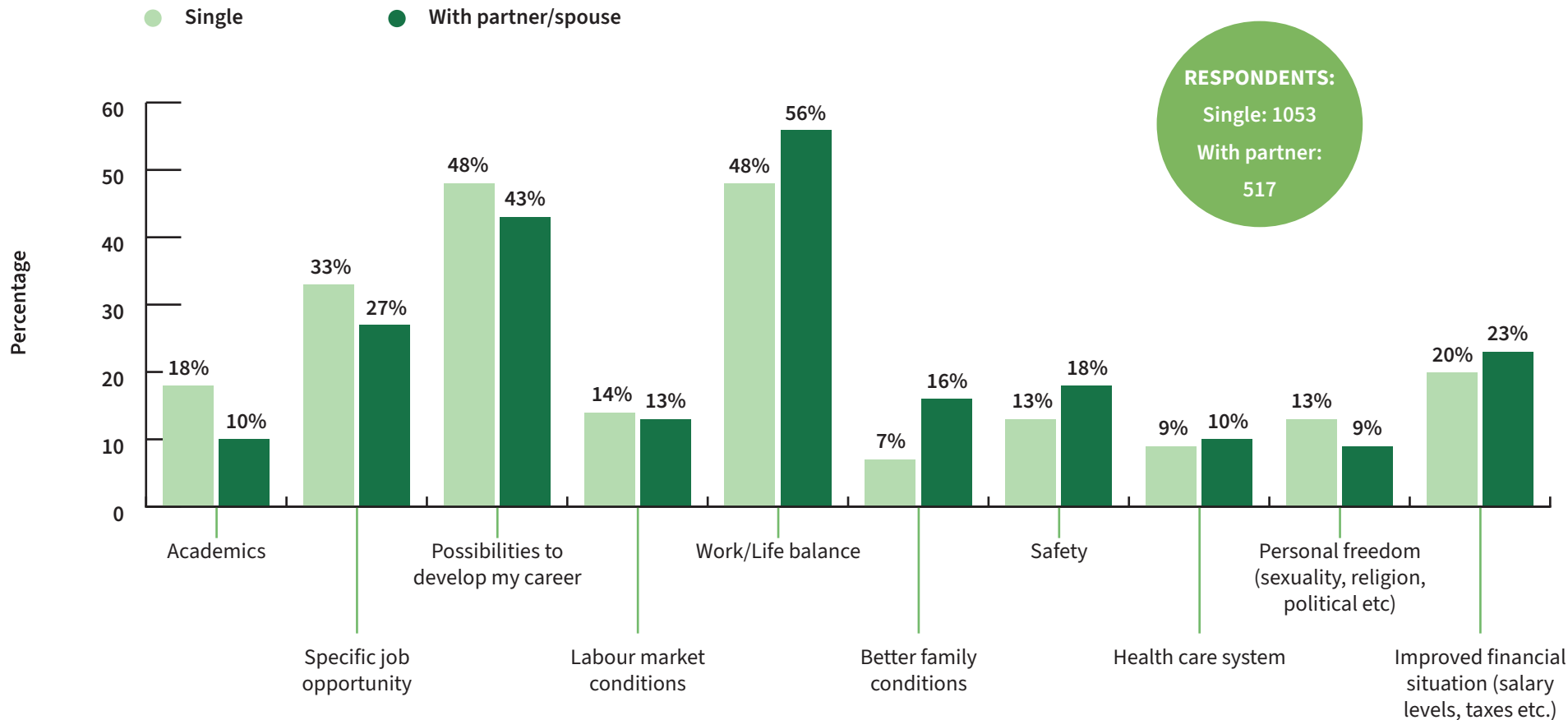


BARRIERS: GENDER

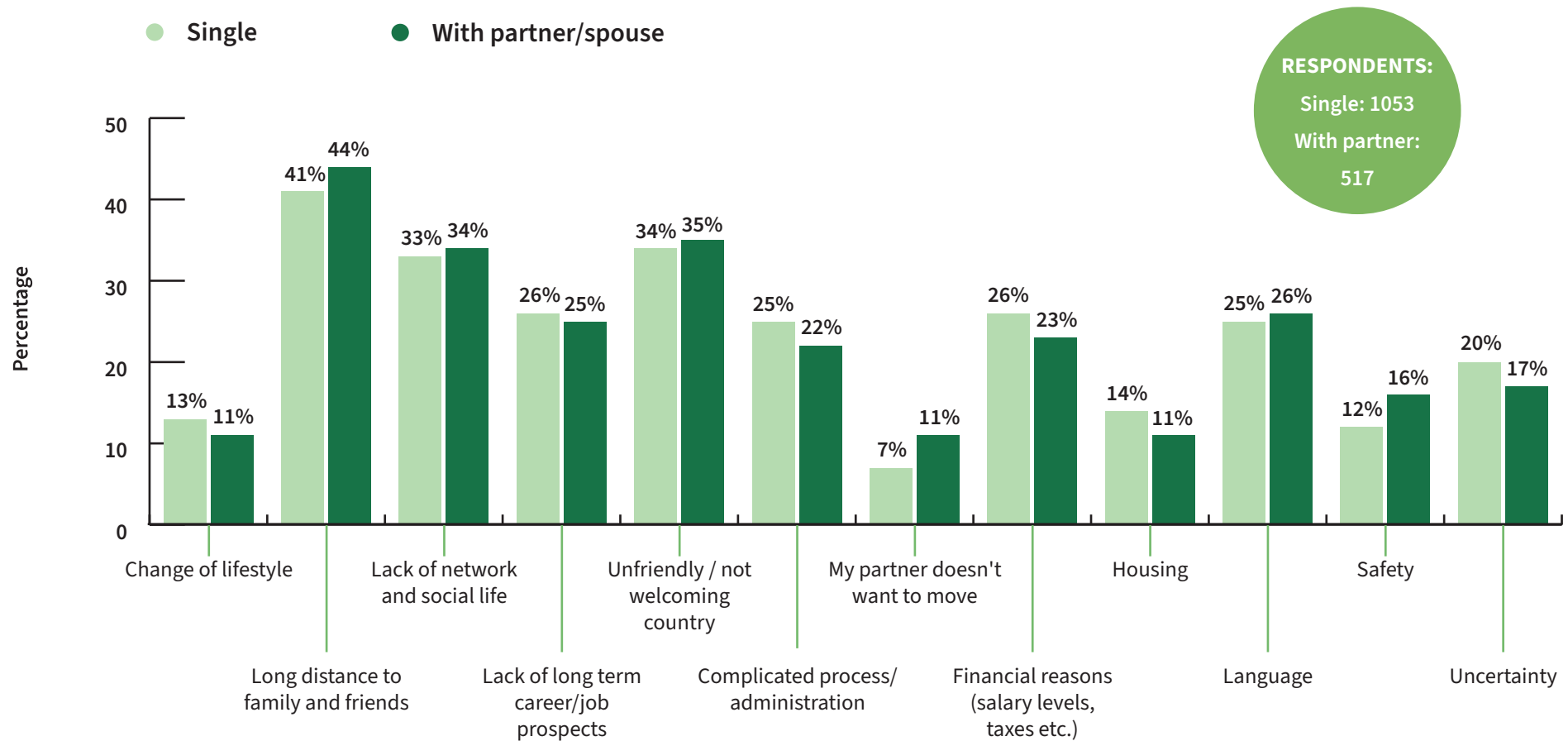


The differences in drivers regarding international mobility stand out quite clearly when comparing singles vs. those with partners. To single individuals, “Academics”, “Specific jobs”, “Develop my career”, and “Personal freedom” are much more important than those with a partner. On the contrary, those with a partner prioritize “Work-life balance”, “Family Conditions” (somewhat obvious), “Safety”, and “Improved financial situation”. The latter may be because there is a family to care for and thus a bigger financial commitment in life in general.

DRIVERS: SINGLE VS WITH PARTNER/SPOUSE



BARRIERS: SINGLE VS WITH PARTNER/SPOUSE



7. Key insights from the company survey



Key insights from the company survey

The importance of the talent agenda

The data shows 3 statements on the general importance of the talent agenda amongst the participating companies:

- ❖ Competence is an important managerial challenge in 2023 (Average score is 8 on a scale from 1 to 10 with 1 being “low” and 10 being “high”).
- ❖ Recruitment will only be more difficult in the next few years (True statement by 67%).
- ❖ Recruitment is most important, but only half the journey, as retention is also a significant concern, whereas onboarding is to a lesser degree.

Opportunities and barriers regarding recruiting international talent

Not surprisingly, we see a very linear model in the way that the bigger the surveyed company is, the more there is a tendency to have international customers, suppliers, and subsidiaries. And there is a similar correlation to the more international employees they have the more international the operations are related to those categories. Maybe more interesting is that we see a steady increase in comparing a company's age versus how many nationalities they employ. It may correlate with the size of the company but also the maturity of being more established.

Opportunities

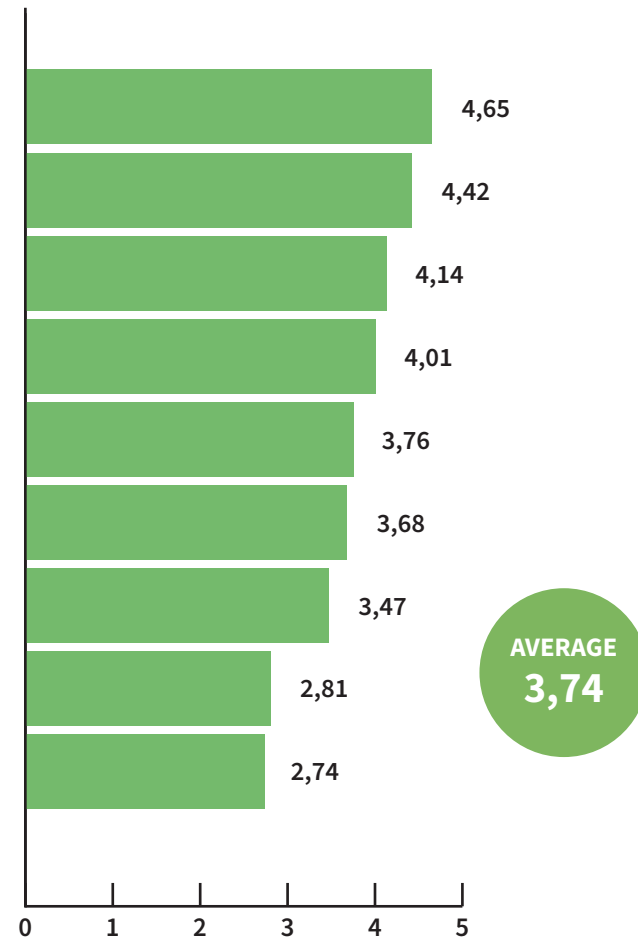
With a weighted average of where the companies most agree to the perception of the importance of certain groups of talent or type of skill, the companies claim to be open to people of different backgrounds and culture, while also being positive about recruiting international employees. In the same vein, the need for a solid understanding of a local language is not deemed as important. On the more academic level, graduate students in general seem to be more relevant than both international students and PhDs of any kind.



HOW IMPORTANT DO YOU SEE THESE TRAITS AND GROUPS TO YOUR ORGANIZATION?

1. In our company, we are open to people of different backgrounds and culture
2. In our company, we are positive about recruiting international employees
3. In our company, hiring graduate students directly from university is something we are open to
4. In our company, hiring PhDs is something we are open to
5. In our company, we want more international students to stay and work after their studies
6. In our company, we need to regularly recruit employees with a master's degree
7. In our company, we want more international researchers to stay and work after postgraduate education
8. In our company, we need to regularly recruit employees with a PhD
9. In our company people must have a solid understanding of our local language

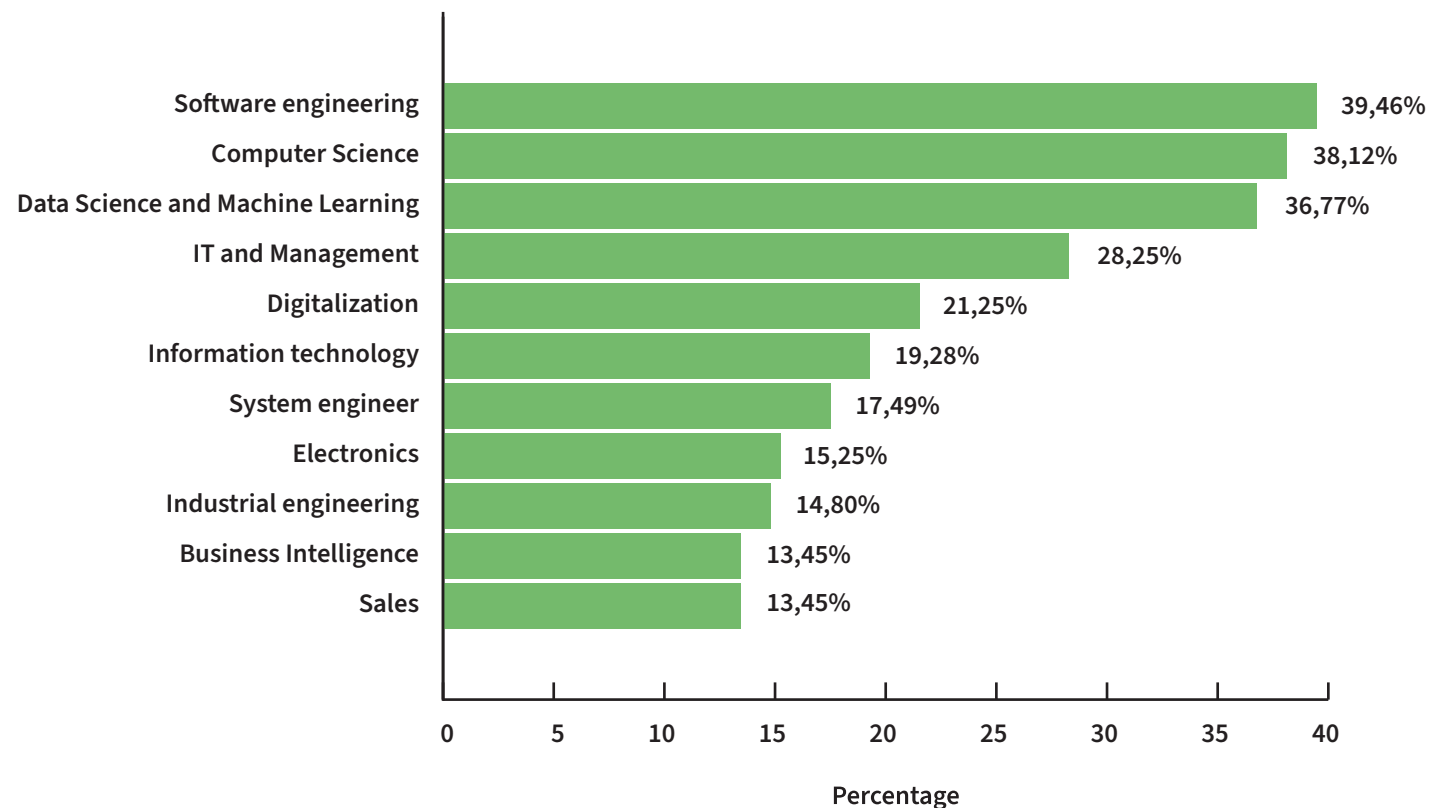
Weighted average based on a 5 point scale ranging from completely disagree to completely agree



On the topic of international recruitment and retention, the companies very interestingly do not find it harder to either recruit or retain international skills compared to domestic skills. But there is a significantly higher uncertainty (don't know) about the group of international talent.

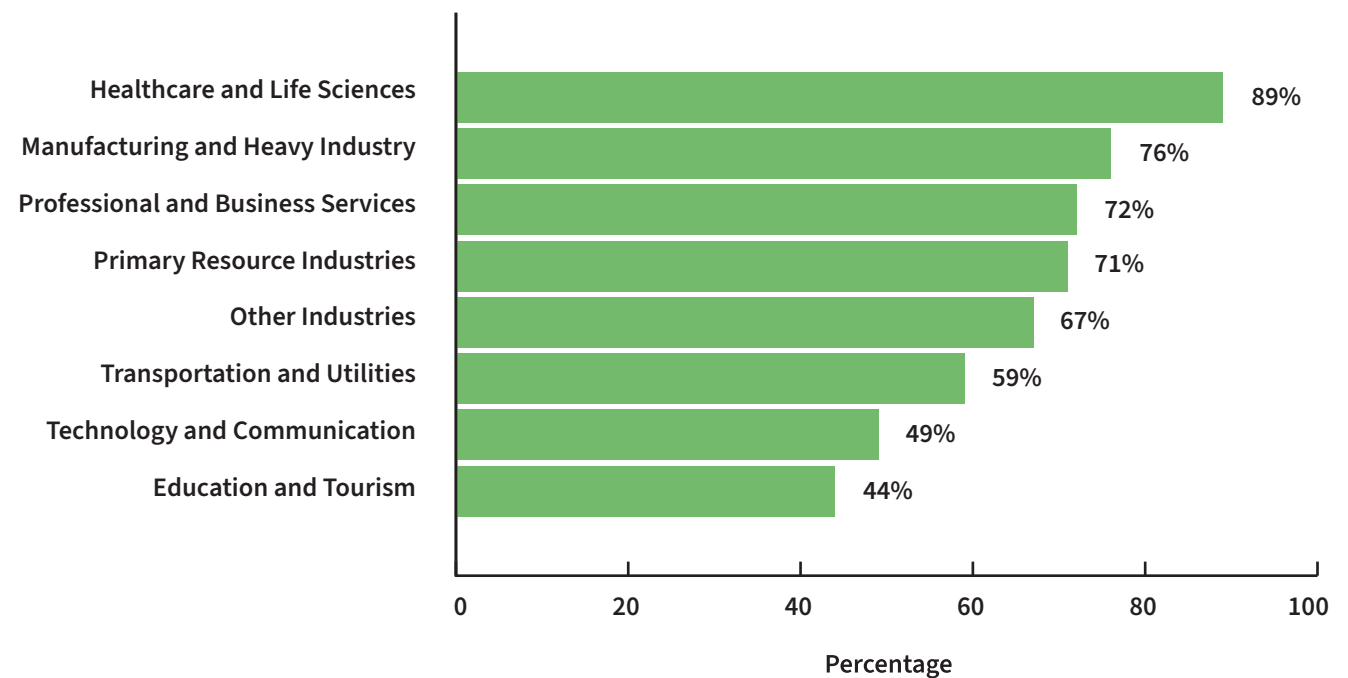
Asked specifically which educational specializations companies highlight a need for, we find the greatest need for international talent within STEM.

NEED FOR INTERNATIONAL TALENT BY EDUCATION SPECIALIZATION



Across the industries of respondents, it appears that Healthcare and Life Sciences, Manufacturing and Heavy Industry, as well as Primary Resource Industries are the ones who expect that it will be more difficult to recruit the competences they need in the next few years.

EXPECTATION BY INDUSTRY THAT IT WILL BE MORE DIFFICULT TO RECRUIT THE COMPETENCES IN THE NEXT FEW YEARS



Difficulties in recruitment of in demand skills by industry

Correlating the industries forecasting the biggest challenges in recruiting the competences they need in the next few years, and their own assessment of most in demand skills defined by educational specializations, what we see is that:

Healthcare and Life Sciences expect to find it difficult to primarily recruit:

- ❖ Biotechnology, Computer Science, and Data Science and Machine Learning

Manufacturing and Heavy Industry expect to find it difficult to primarily recruit:

- ❖ Industrial Engineering, Software Engineering, Electronics, and Mechanical Engineering

Professional and Business Services expect to find it difficult to primarily recruit:

- ❖ Data Science and Machine Learning, Computer Science, and Software Engineering

Furthermore, the largest sample of company respondents is the Technology and Communication industry. Here the biggest need specifically is:

- ❖ Software Engineering, Computer Science, Data Science and Machine Learning, and IT and Management

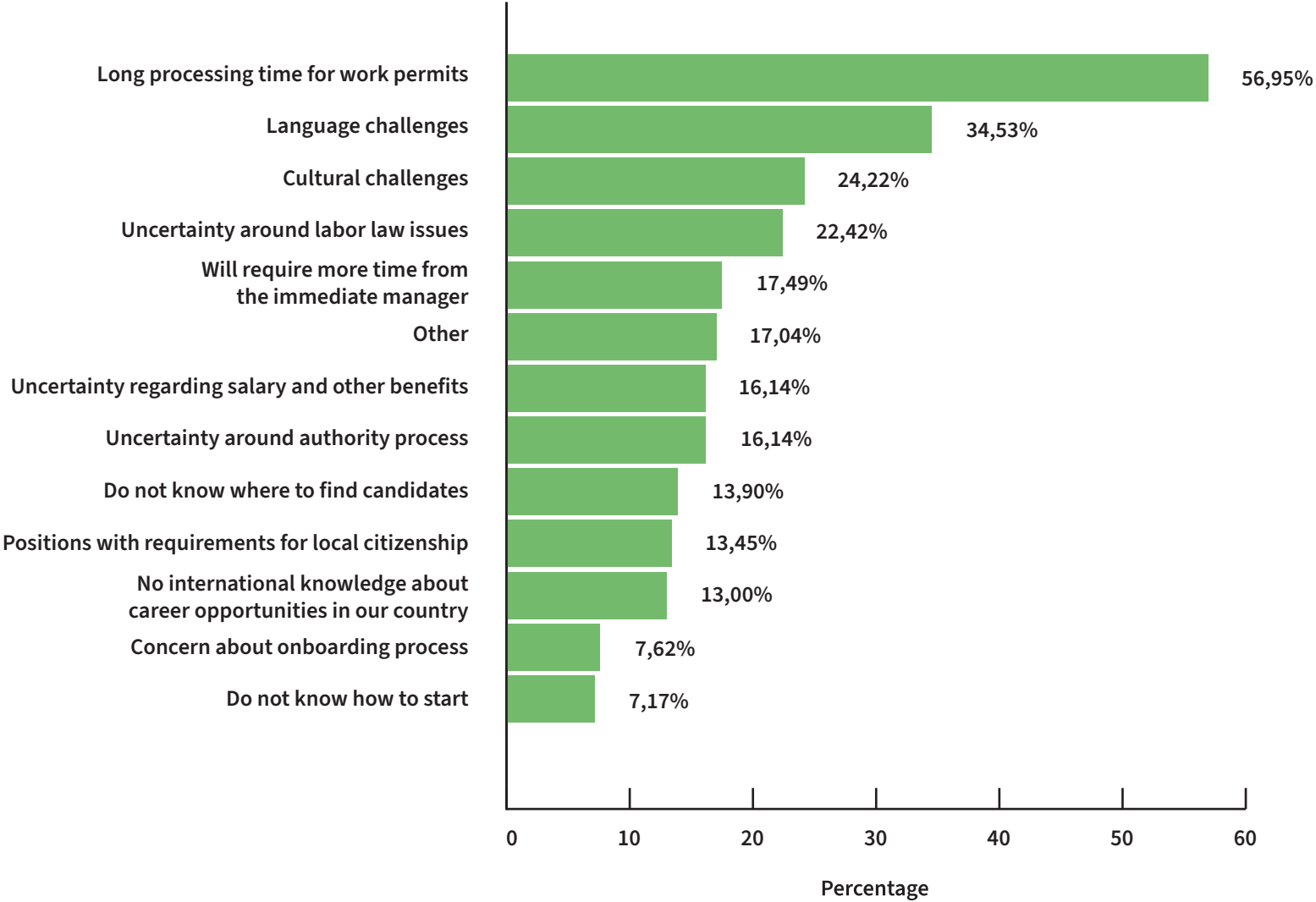


Barriers

The main elements that prevent our participating companies from recruiting international talent are in prioritized order:

- 1. Long processing time for work permits
- 2. Language challenges
- 3. Cultural challenges
- 4. Uncertainty about labor law issues
- 5. Extra time requirement from the immediate manager

WHICH OF THE FOLLOWING DO YOU THINK IS PREVENTING YOUR COMPANY FROM RECRUITING INTERNATIONAL TALENT?



Help needed

47% of all companies confirm they need more knowledge about recruiting international skills. Asked specifically, what kind of help they need, the most frequent topics mentioned are:

- ❖ **Legal complexities: visas and work permits.**
- ❖ **Uncertainty in starting, finding talent & understanding recruitment.**
- ❖ **Recognized need, but lack of structured process.**
- ❖ **Integration of foreign talents and bureaucratic navigation.**
- ❖ **Seeking expert guidance and trusted partners for assistance.**



8. The mirror: Experiences and insights from talents and companies



The mirror: Experiences and insights from talents and companies

Access to competencies is clearly stated as an important managerial challenge in 2023 in this survey and companies foresee that recruitment only will be more difficult in the next few years. To what extent, then, is the international workforce part of the solution?

The data shows a stereotypical side of companies claiming to be open to people of different backgrounds and culture, while also being positive about recruiting international employees. But what-if anything - is holding them back? As previously shown, the top 3 barriers companies perceive to hiring an international workforce are: “Long processing time for work permits”, “Language challenges”, and “Cultural challenges”.

Here language is particularly interesting as the companies elsewhere in the survey also state that the need for the candidate to have a solid understanding of a local language is not deemed as important. Maybe the conclusion is that talents often must speak the local language or that the companies do not feel strong enough in English as a common language.

What may be holding companies back is the interesting insight that companies have a significantly higher uncertainty (don't know) about the group of international talent as a hiring pool than domestic talent. They claim to not find it harder to either recruit or retain international skills compared to skills in general, but the knowledge is much lower about the international element. This is also supported by the notion that "Uncertainty in starting: finding talent" and "Understanding recruitment" is the second most referenced topic of "help needed" by companies. The highest being "Legal complexities: visas and work permits". Here migration systems and government action come into play, which is neither in the hands of the talents nor the companies beyond a lobby effort for improved framework conditions. So maybe since the companies "don't know", it is easier to do what you do know better and to avoid what is hard and time-consuming related to admin burden and processing times of seeking to hire internationally.

When we look at it from the talent perspective, they are somewhat split between the job or the opportunity to start a business and the place defined as the city/country on deciding to go abroad. So, it is not "just" on the employer. The place assets matter. They also point to the settling-in experience to be not perfect smooth sailing.

The question begs to what degree is that a public sector task or a company onboarding responsibility? Maybe, the truth is somewhat in the middle. And of course, highly dependent on the framework conditions being offered in a given country.

In that vein, let's recall that the main drivers both related to moving abroad more in general and to accepting a specific job offer are less financial incentives offered by employment contracts but more so areas such as work-life balance, possibility to develop a career and gaining professional growth and of course actual job offers. Now to have a great work-life balance often is perceived beyond the working conditions at a given company and the labor laws of the country, but also the actual leadership style, cultural openness, and what life has to offer of amenities and experiences in the given place. Consequently, again we step into an area of both private and public intervention needed to provide what talents are looking for. Still, maybe companies to a higher degree need to look more at what they can offer that is more in tune with the drivers of the global talent pool, while going at least one step further than they do now in considering onboarding as a 24-7 lifecycle supporting the internationals after they leave the office (or turn of the computer remotely) to a higher degree with social and cultural integration.

And nothing happens without the work/ residence permit, which - in particular - students state is the biggest barrier for staying long term. Which also is the number one concern among companies. So that is one place to start for the mirror to meet each other.

In conclusion, deepening the understanding of the interplay between companies' strategies and international talents' expectations. By focusing on integration, inclusive language practices, streamlined bureaucratic processes, career development, and a culturally attuned work-life balance, companies can more effectively meet the nuanced needs of their international workforce. These key areas highlight opportunities for both private and public sectors to collaborate in creating a more favorable environment for international talents, enriching the dialogue on global mobility and talent management.

As stated in the analysis of this report, it is interesting to see that the most sought-after profiles by the companies in the survey (IT and Engineers), are also the ones that are more satisfied with life in general in the new country (7.3 vs 7.0 on a 1 to 10 scale) and also rate the actual experience in settling into the new country you as easier (6.5 vs 6.1 on a 1 to 10 scale). Hence there seems to be less of a concern related to retention of these profiles if they can be identified and convinced to relocate in the first place.



9. Conclusions

Conclusions

The survey tells us that both places and companies need to acknowledge that it is not about the place or the job, it is about both. Drivers and barriers related to global mobility are much more than the job itself and financial incentives.

Work-life balance takes the lead as the main driver for deciding to live in another country, followed by the possibility of developing a career, and then the specific job opportunity. Meanwhile, the main drivers for accepting a job/starting a business abroad start with professional growth followed by work-life balance. Consequently, places and employers need to help each other, providing the recipe for success that is the 24-7 user journey - a life far beyond the job opportunity. It is not just about saying the right things in the marketing and recruitment efforts, but to walk-the-talk and provide an actual holistic experience of studying, living, and working in the place.

Asked what the main barriers in deciding to live in another country are, “Long distance to family and friends” is the biggest concern, followed by an “Unfriendly/Not welcoming country” and “Lack of network and social life”. For obvious reasons, distance cannot be changed, but working with being a welcoming society for newcomers and providing access to people and connections opening up for an improved social life for non-locals will help overcome the main perceived challenges.





And let's also consider what would make people stay longer term. Not being eligible for a residence permit, or the application process is too complicated is a concern that is generally number one and even more so for students, while not having contacts with potential local employers and not speaking the native language also is frequently mentioned.

Also, subgroups differ from STEM to non-STEM profiles in preferences and challenges; from singles to families, from students to professionals, and from male to female to name a few. Each experience is different. Some countries are more successful than others. Still, the data tells us that the issues are transborder and thus we can work together to solve them.

The interest is there for sure from companies, as they acknowledge the importance of access to competencies and see recruitment and retention as a significant growing challenge of the future.

Yet, companies are still not knowledgeable enough about how to work with international skills. And maybe the hardship of the paperwork keeps them from going all in. It may be debatable to what degree language comes into play here, but exploring more the overall maturity of companies is definitely a recommended action. Specifically, companies themselves acknowledge they need help and list legal complexities: visas and work permits, uncertainty in starting: finding talent, and understanding recruitment as to where they would like support. This corresponds well with what the companies state as the main barriers in hiring competencies from abroad: long processing time for work permits, language challenges, and cultural challenges in that order. In essence a fair mirror of what we hear from global workers.

10. Recommendations

Recommendations

Based on the interpretation of the data responses, some suggested actions are recommended. Considering the participant groups (international talents, companies, and governmental offices) as the main actors to improve the overall experience.

Initiative from companies

❖ Extending integration beyond recruitment:

Complementing the observation about companies' openness to international talents, it is pivotal to extend focus beyond recruitment. A more comprehensive approach to onboarding and integration, encompassing not only job-related support but also social and cultural assimilation, can significantly improve the talent experience.

❖ Inclusive language practices in workplaces:

Echoing the language-related observations made earlier, a critical aspect is the operational language in workplaces. Even when companies do not prioritize local language proficiency in hiring, the predominant use of the local language can create barriers. A shift towards more inclusive language practices or providing language support can enhance inclusivity.





- ❖ Cultivating a culturally compatible work-life balance:

Adding to the discussion on work-life balance, it's crucial for companies to ensure their culture is compatible with the diverse needs of their international workforce. This goes beyond job specifications to encompass cultural openness and lifestyle considerations that impact talent satisfaction and retention.

- ❖ Offer international students part-time jobs or internships:

What we see from the data is that relevant work experience does leave an international student with a higher perception that good opportunities and support are available to start and grow a career in the new country and a slightly higher perception that good career opportunities for internationals like themselves exist in the new country while also being slightly more positive about making new friends. It does not however change how welcome they feel in the country.

- ❖ Focus on career development and satisfaction:

Building on the idea of what attracts international talents, companies can further their appeal by emphasizing career growth and professional development opportunities. This aligns with the aspirations of talents seeking not just a job but a pathway for career progression.

Initiative from government organizations

❖ Streamlining bureaucratic processes:

In line with the shared concerns about bureaucratic hurdles, simplifying work permit processes and advocating for supportive government policies could be a mutual goal for both companies and talents, easing a major impediment to talent mobility.

Initiative from international talents

❖ Active interest and participation of international talents to learn the local labor market, language, and culture:

Part of the success of the process of attracting and retaining international talent is the curiosity and effort to understand the local context. Active participation and self-leadership to develop a career plan are necessary for all international talents who want to join the local workforce.

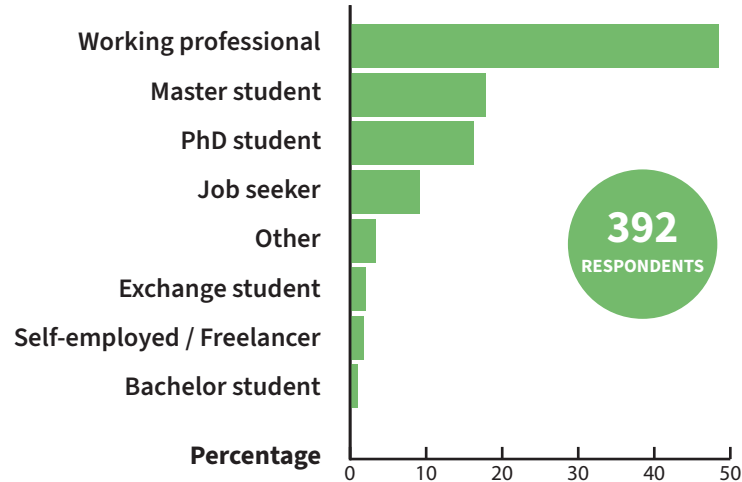
Interestingly it seems that techies and engineers, who happen to be very sought after by employers, tend to be happier than the average global mobile worker in their new country. So maybe we start doing more of what works and address the help the companies are asking for. And the bottlenecks in the user journey the mobile international workforce points out.

Let's get to work!



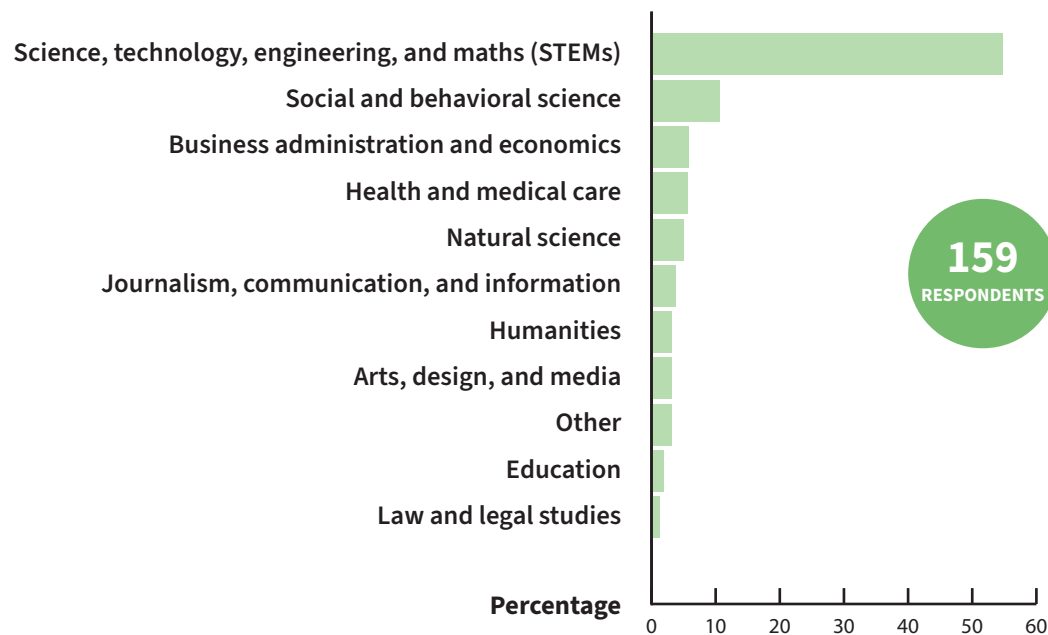
11. Appendix

What is your current primary status

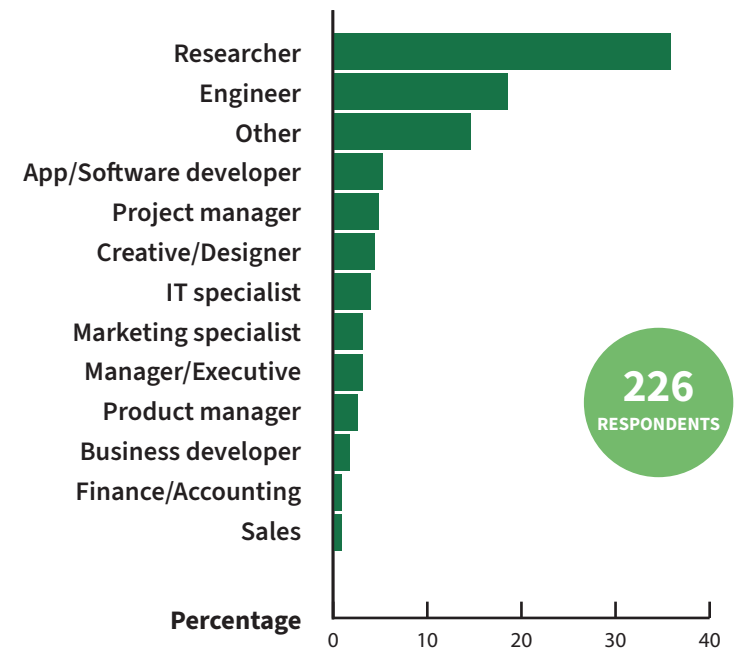


Sweden

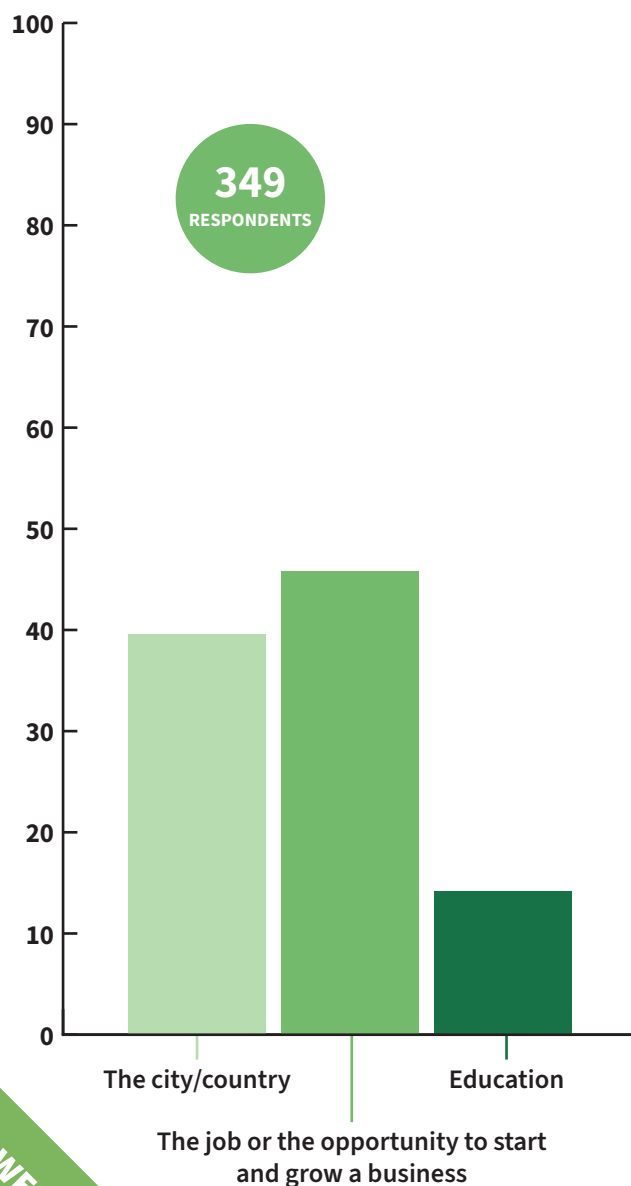
For students: What is your academic field or most recent degree programme?



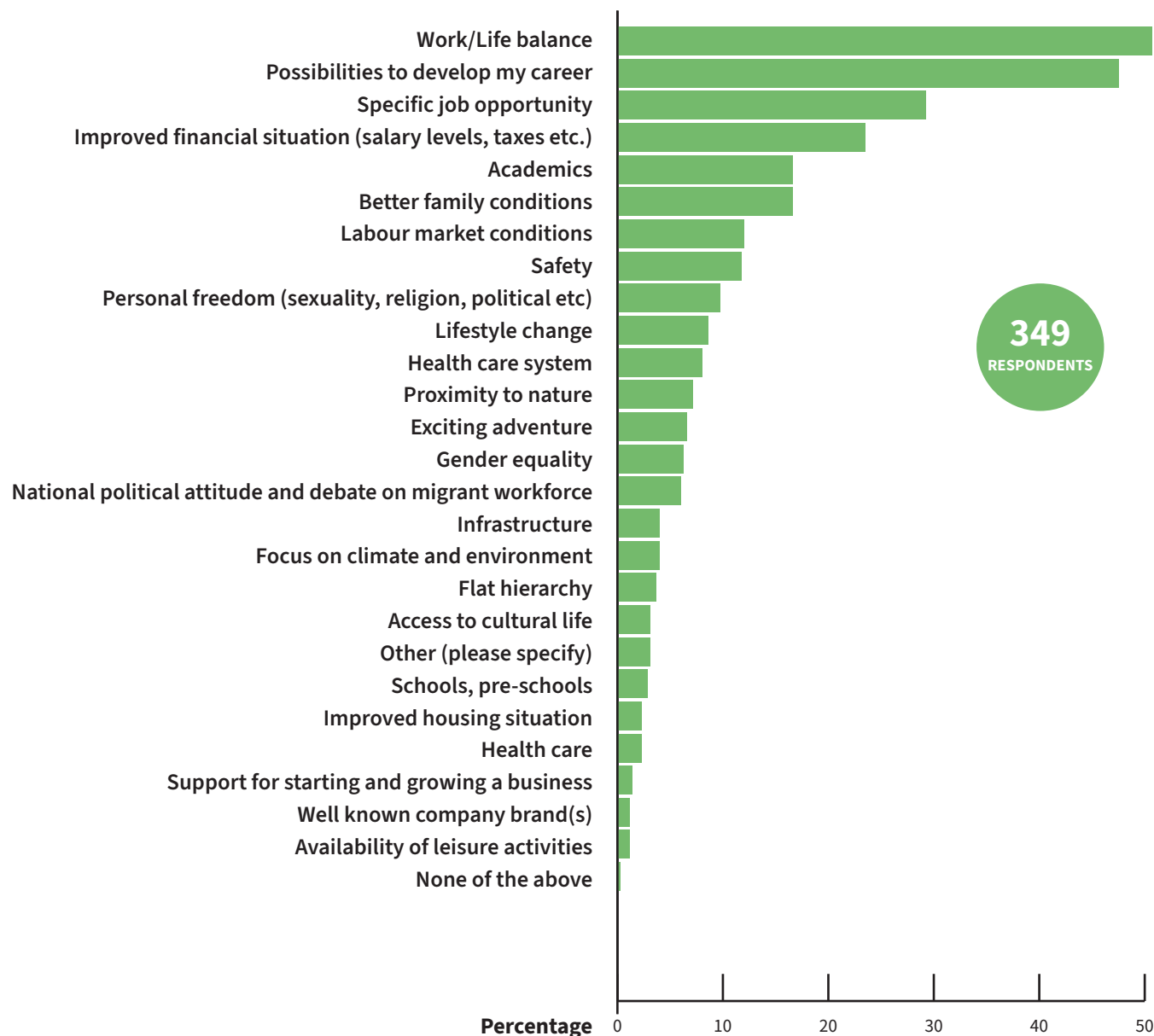
For professionals: Which category below is closest to your primary profession?



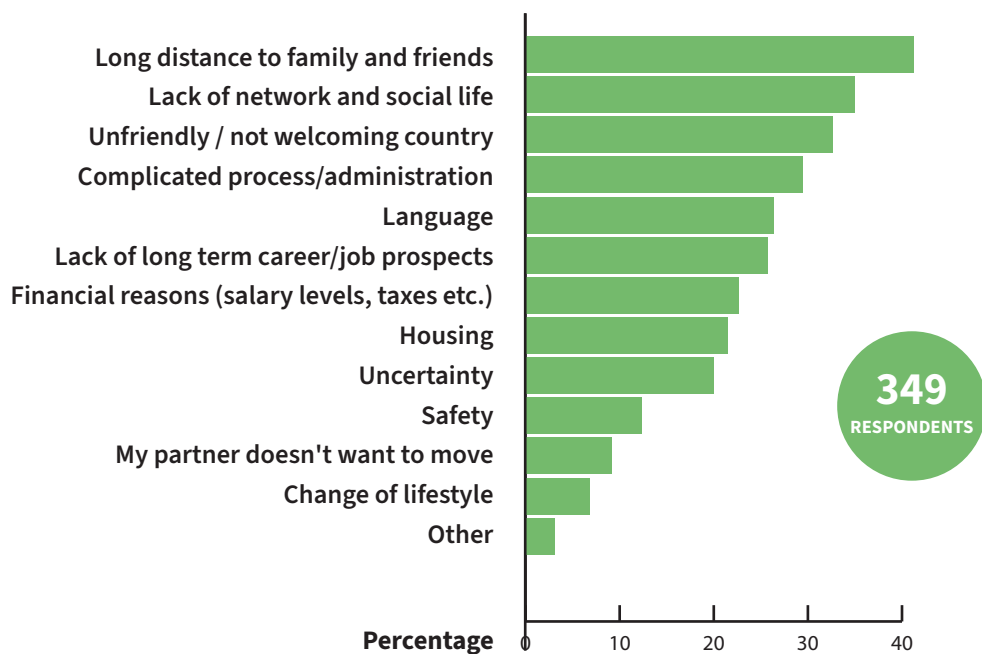
What do you think matters most when choosing to live abroad?



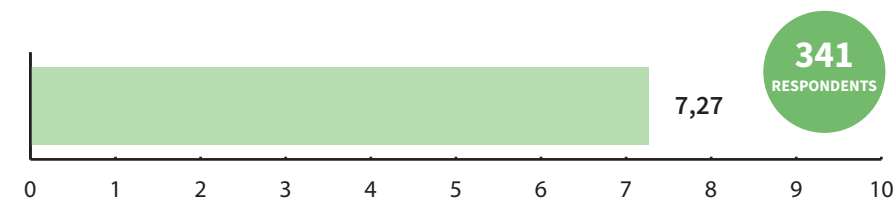
In general, what would be your main drivers for deciding to live in another country?



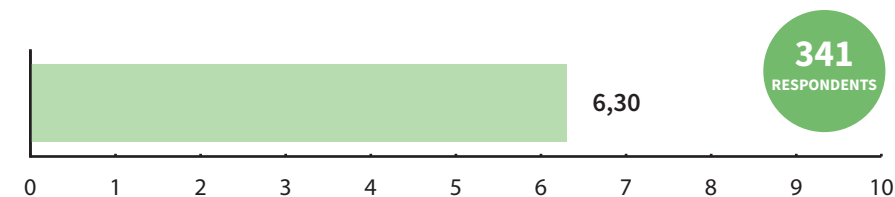
In general, what are the main barriers for you to choose to live in another country?



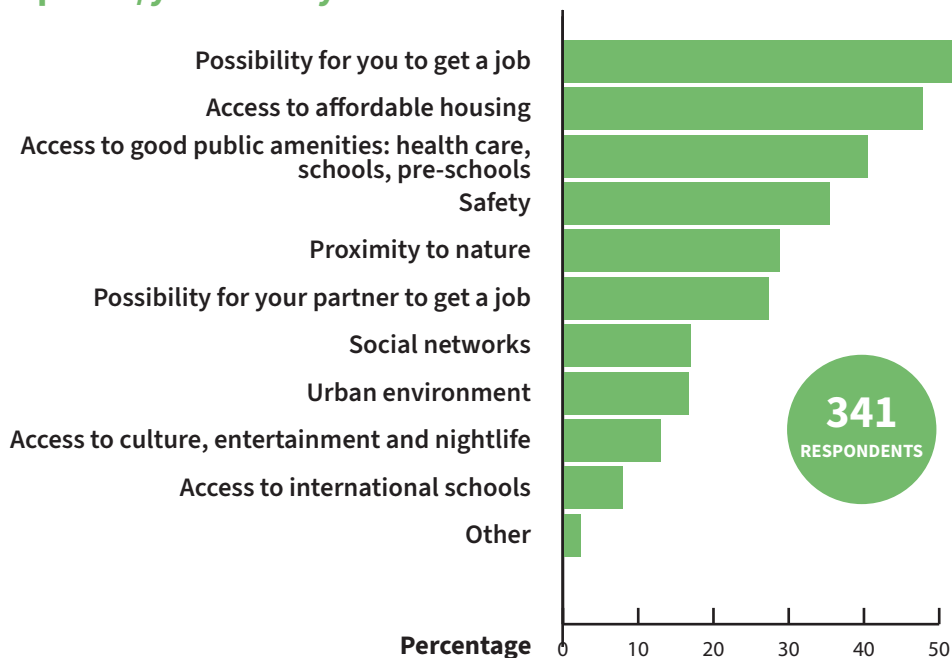
On a scale from 1 to 10 with 1 being I cannot wait to leave and 10 being I love it here, how satisfied are you with living in the country you currently reside in?



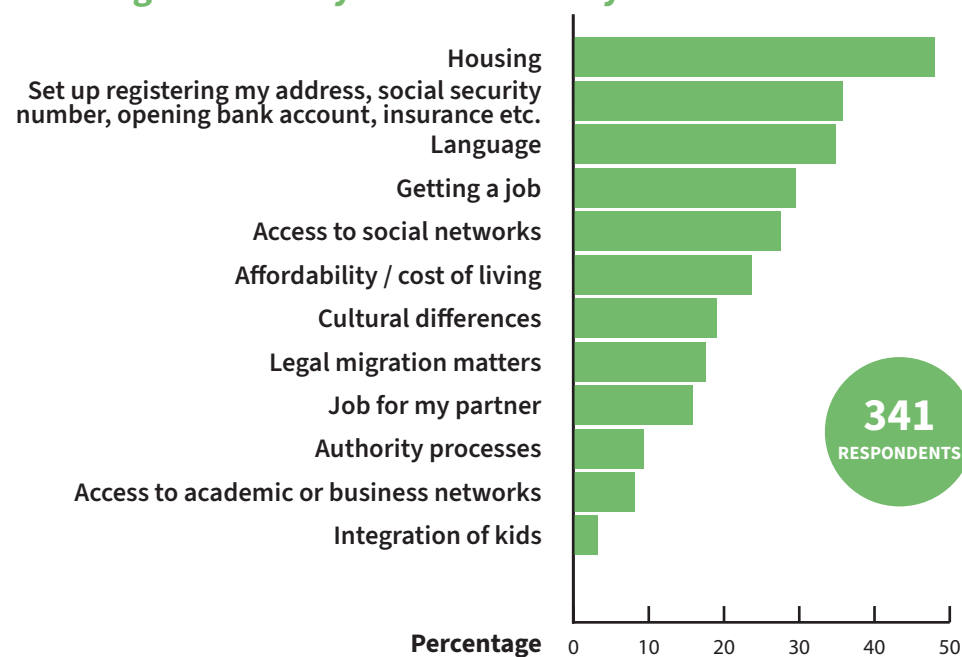
On a scale from 1 to 10 with 1 being very hard and 10 being very easy, how would you rate your experience in settling into the country you currently reside in?



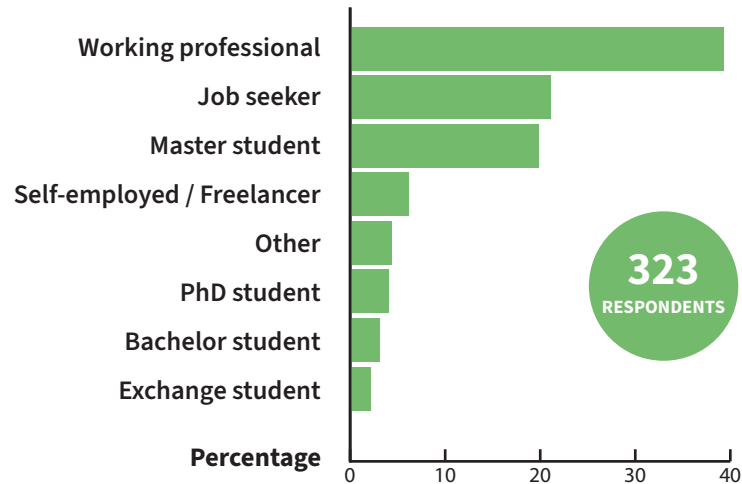
Which amenities are important for you/your spouse/your family to settle in?



What have been your biggest challenges related to integration into your new country?

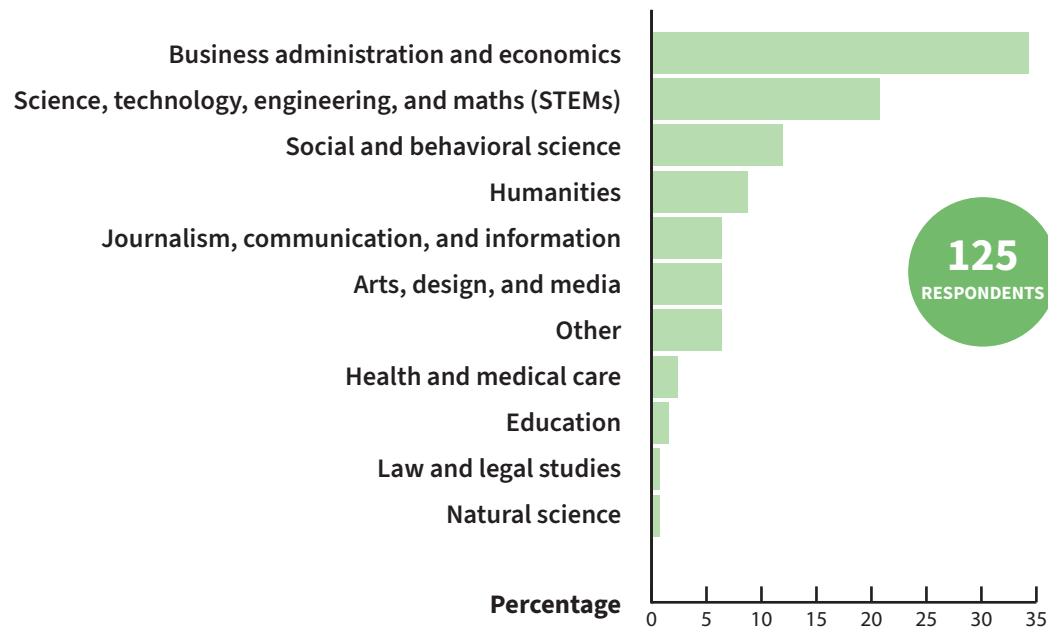


What is your current primary status

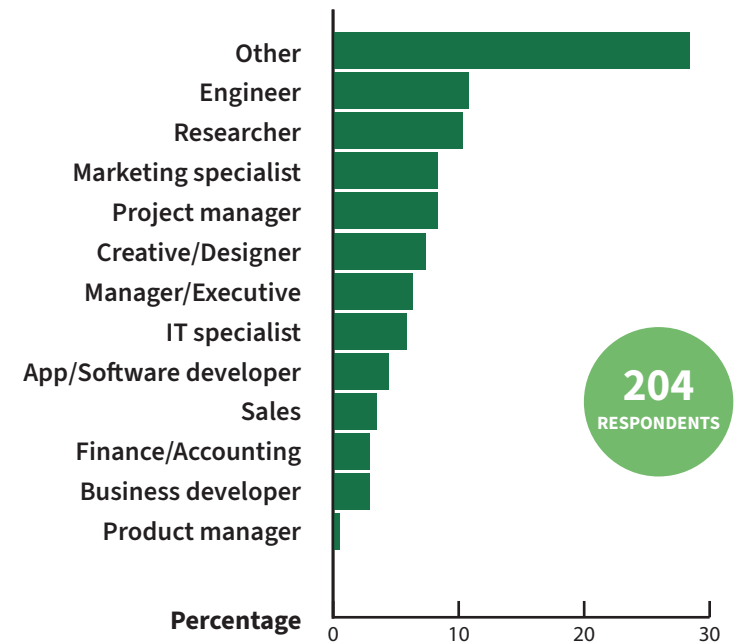


Norway

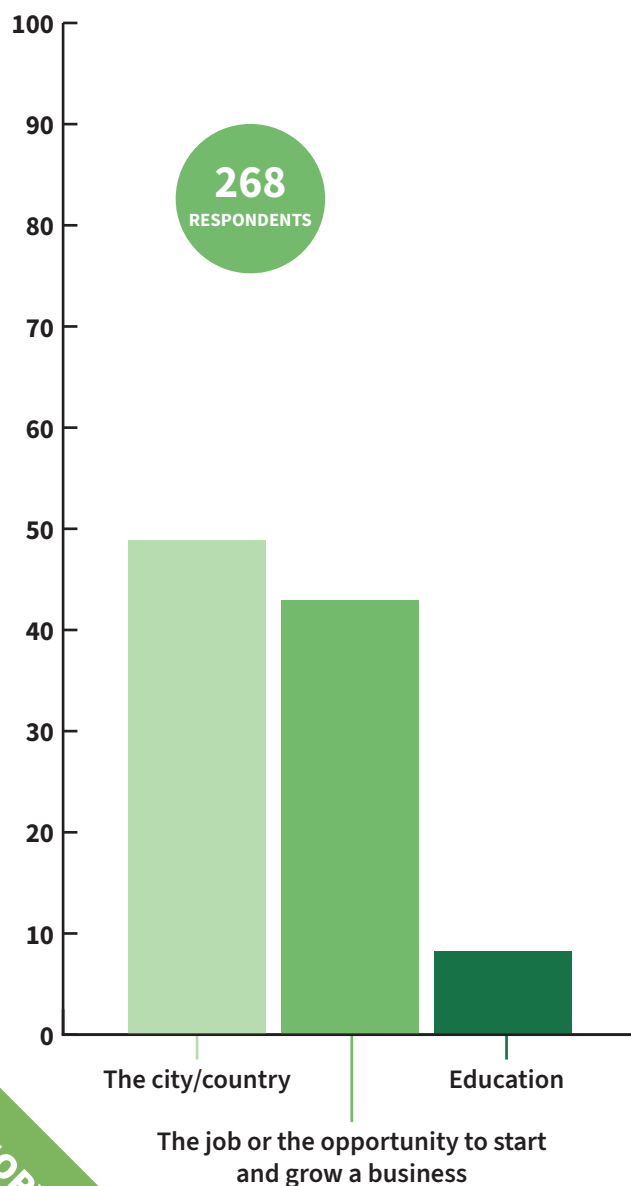
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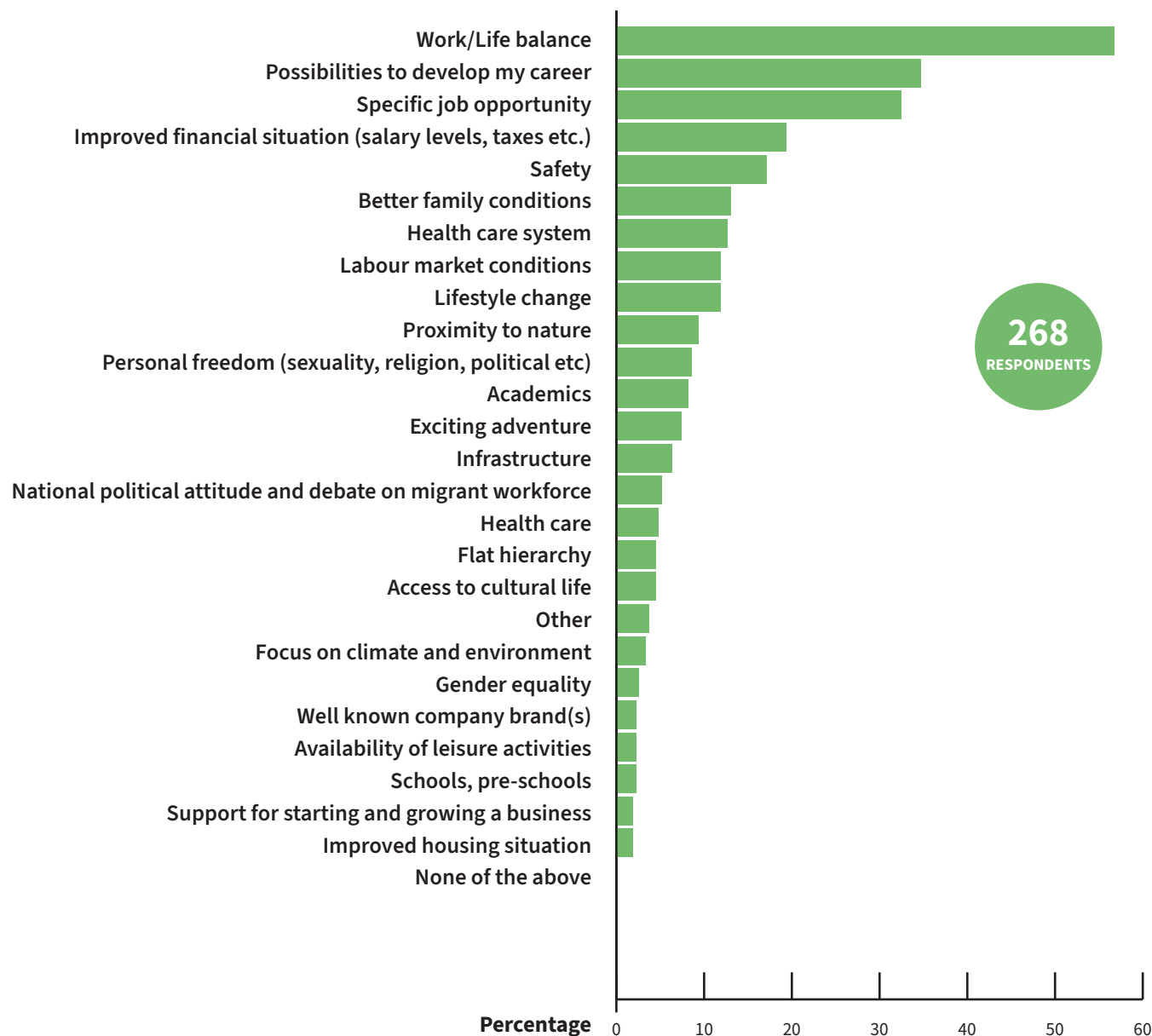
For professionals: Which category below is closest to your primary profession?



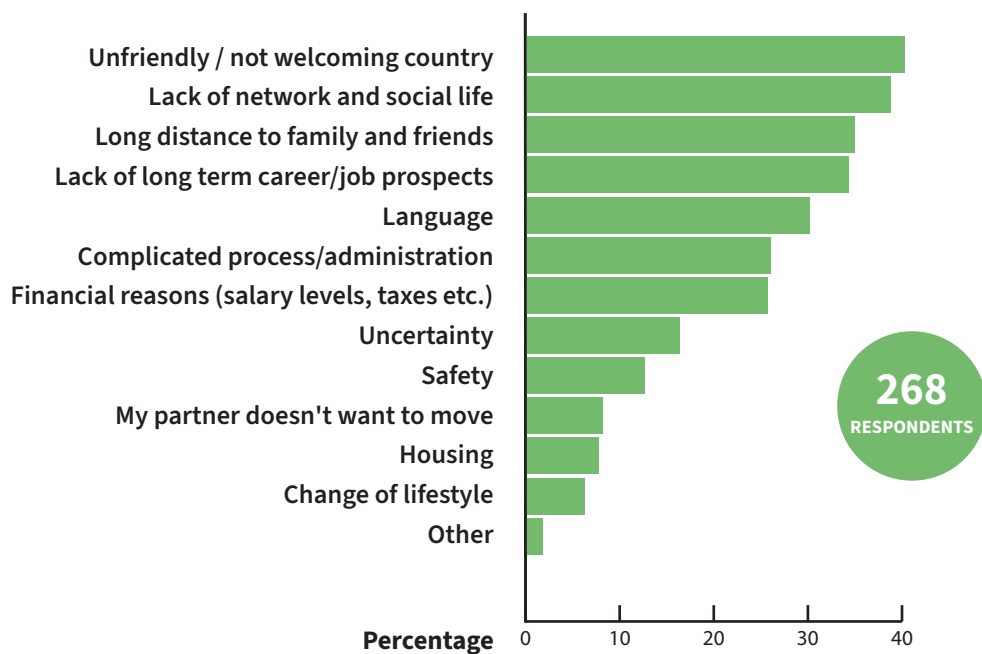
What do you think matters most when choosing to live abroad?



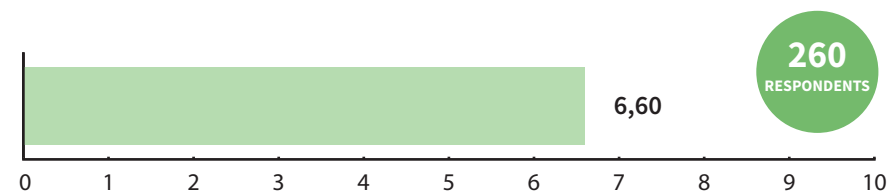
In general, what would be your main drivers for deciding to live in another country?



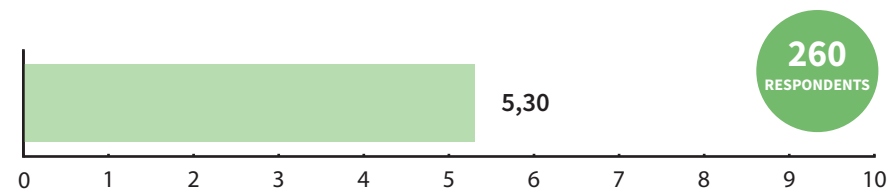
In general, what are the main barriers for you to choose to live in another country?



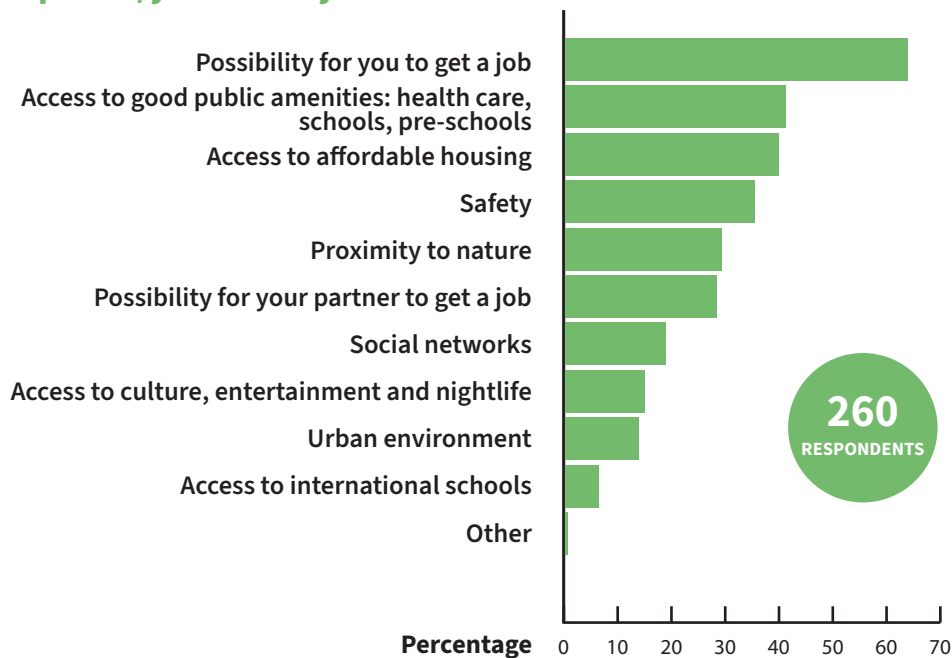
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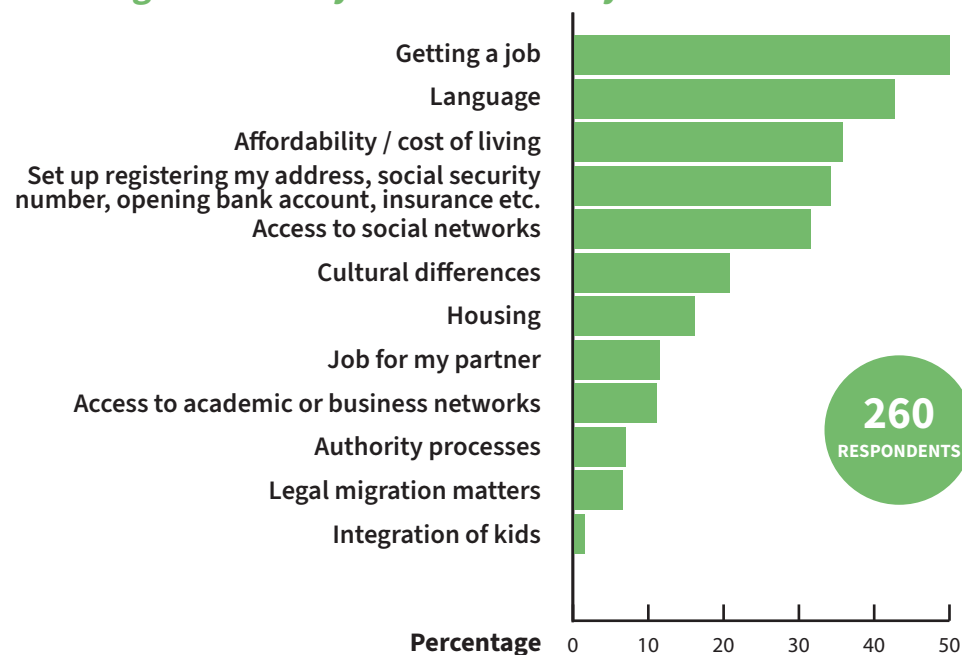
On a scale from 1 to 10 with 1 being very hard and 10 being very easy, how would you rate your experience in settling into the country you currently reside in?



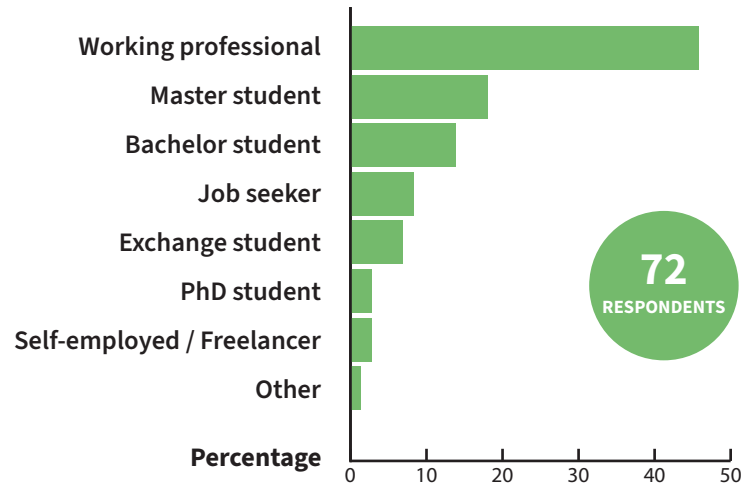
Which amenities are important for you/your spouse/your family to settle in?



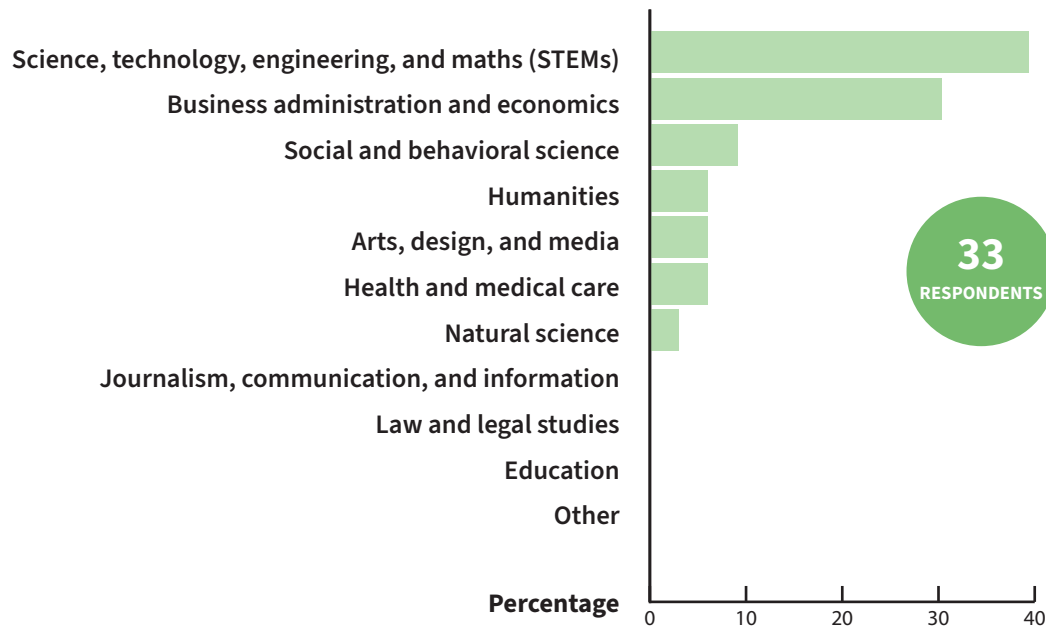
What have been your biggest challenges related to integration into your new country?



What is your current primary status



For students: What is your academic field or most recent degree programme?

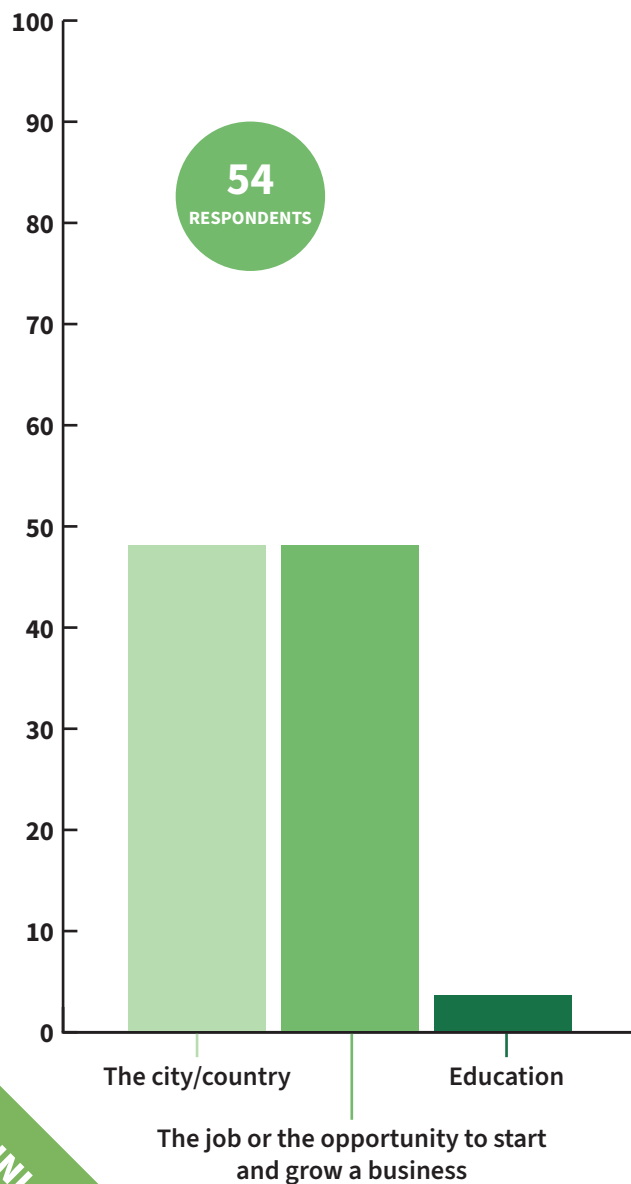


Finland

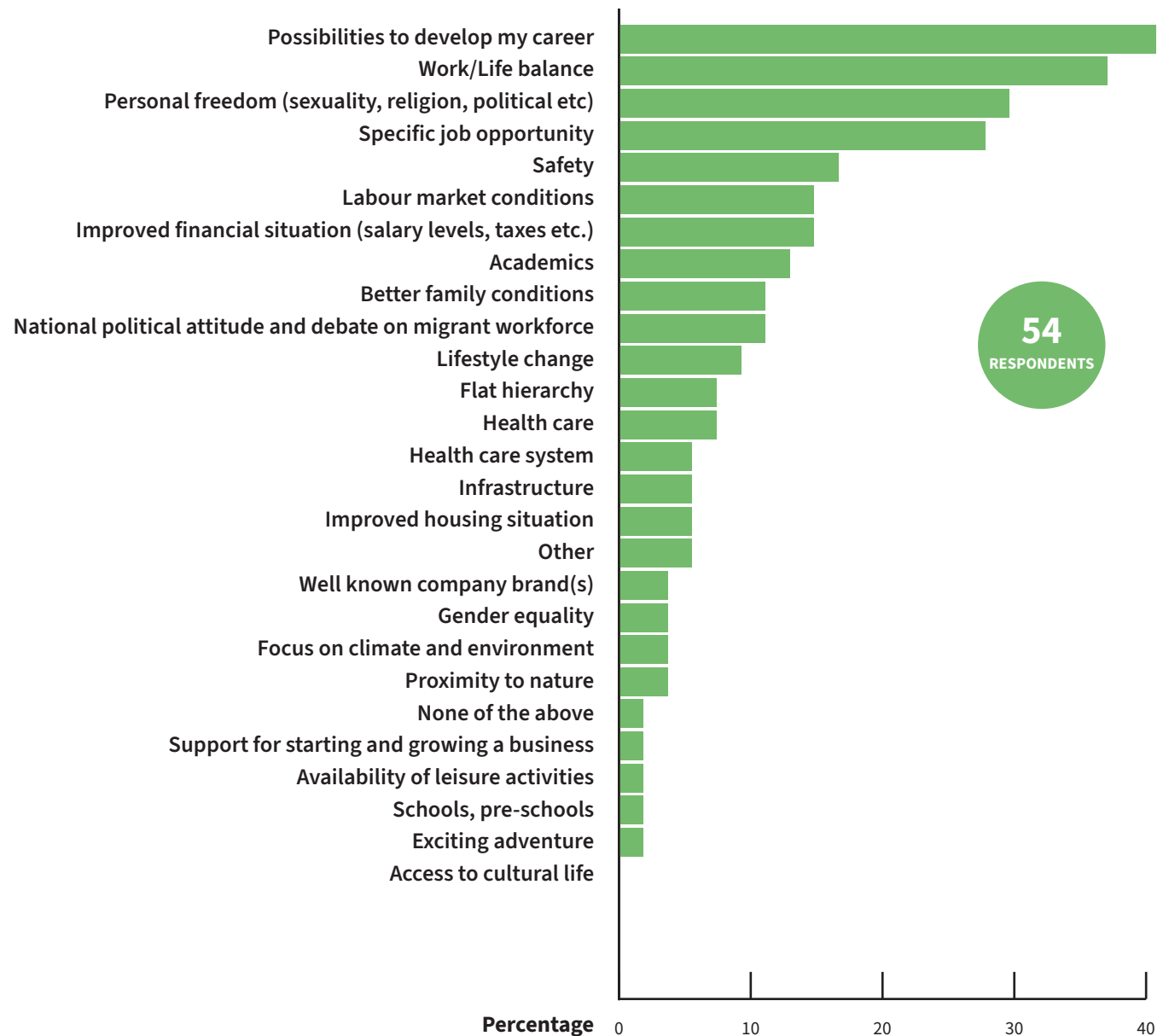
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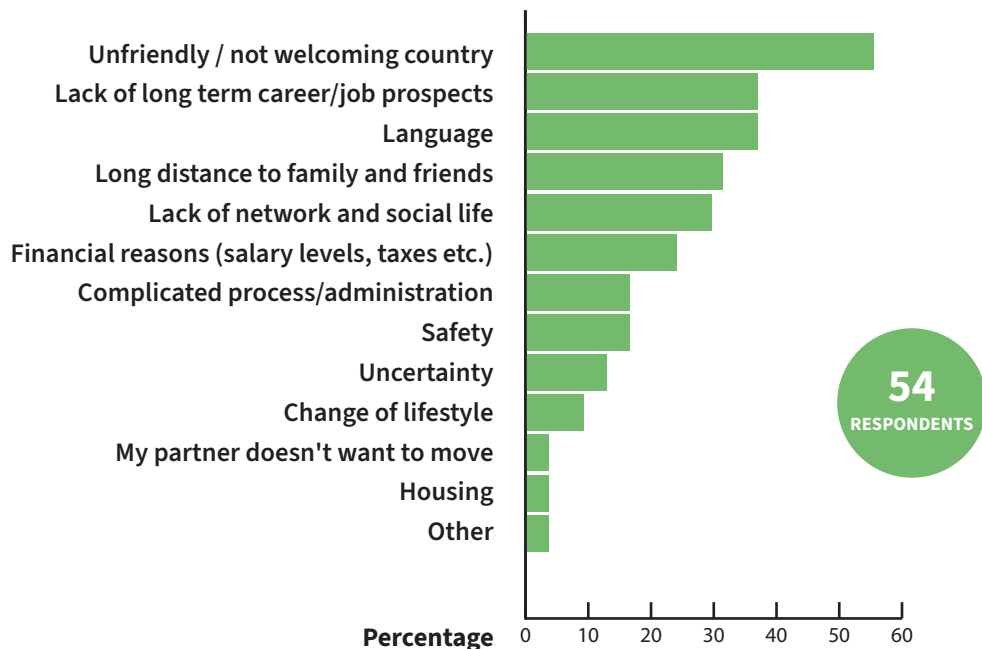
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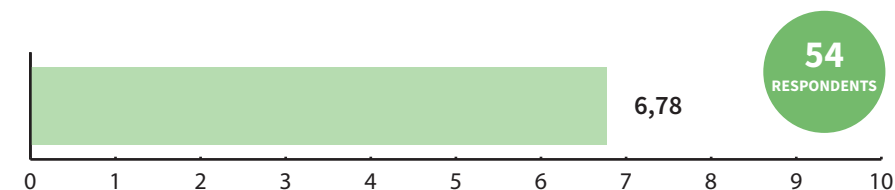
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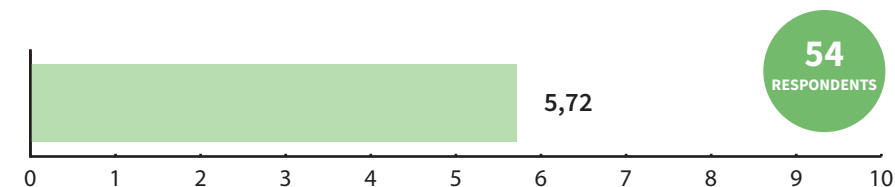
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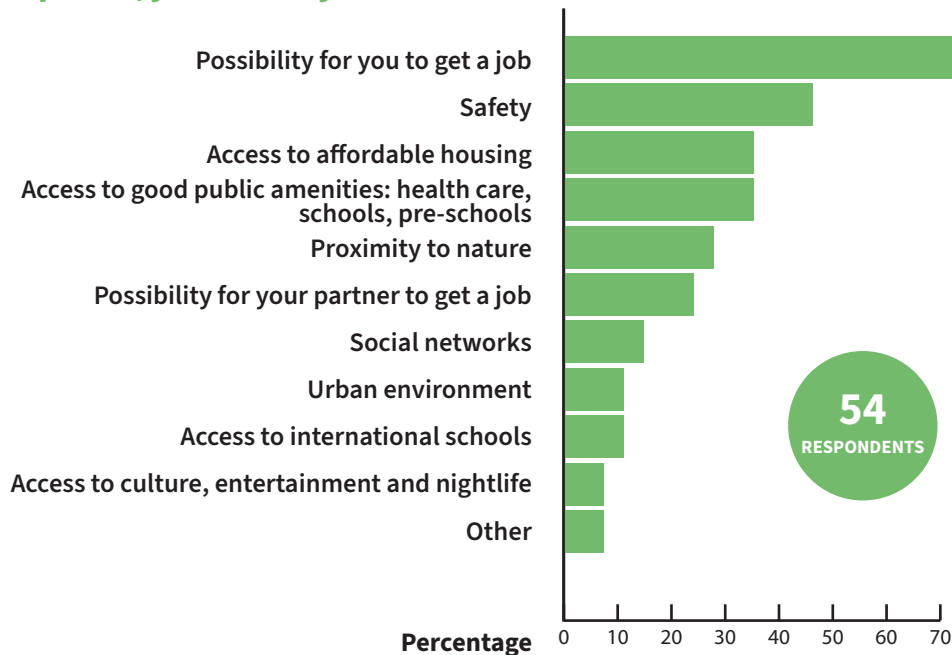
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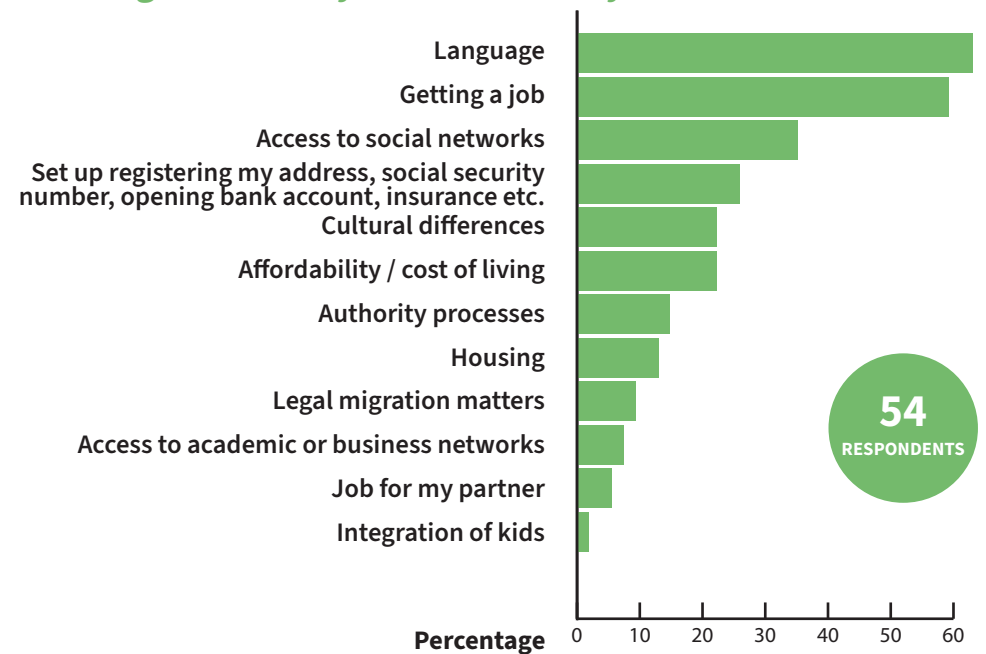
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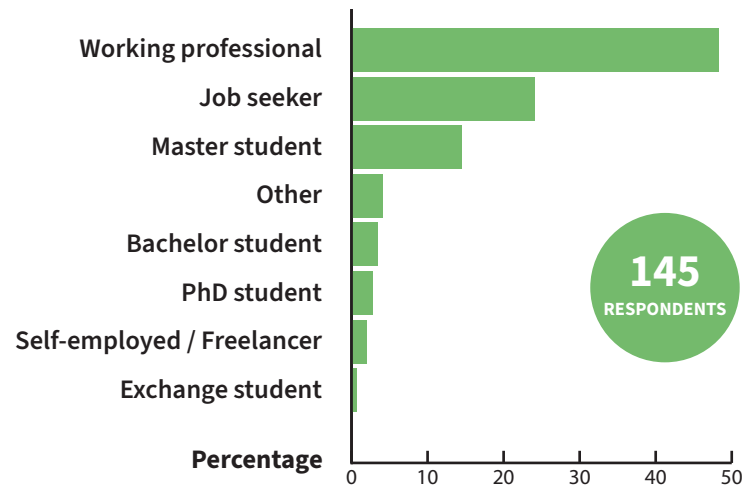


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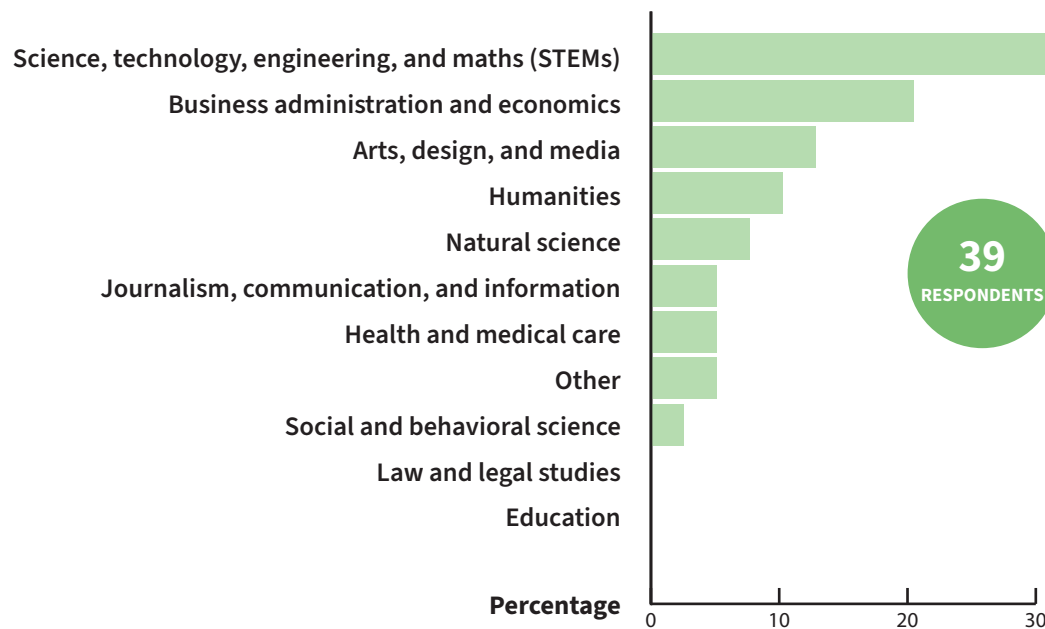


Denmark

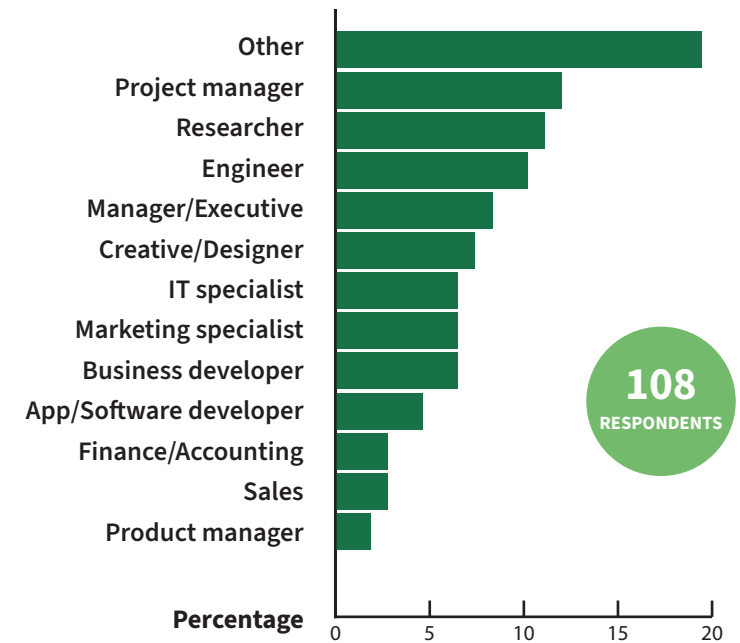
What is your current primary status



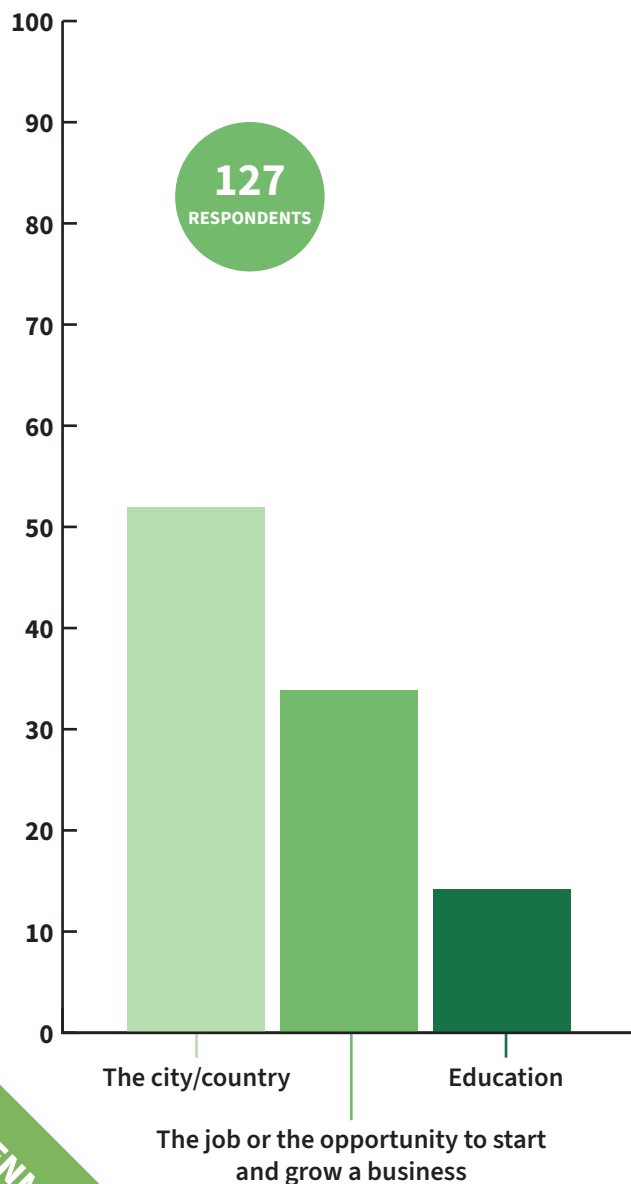
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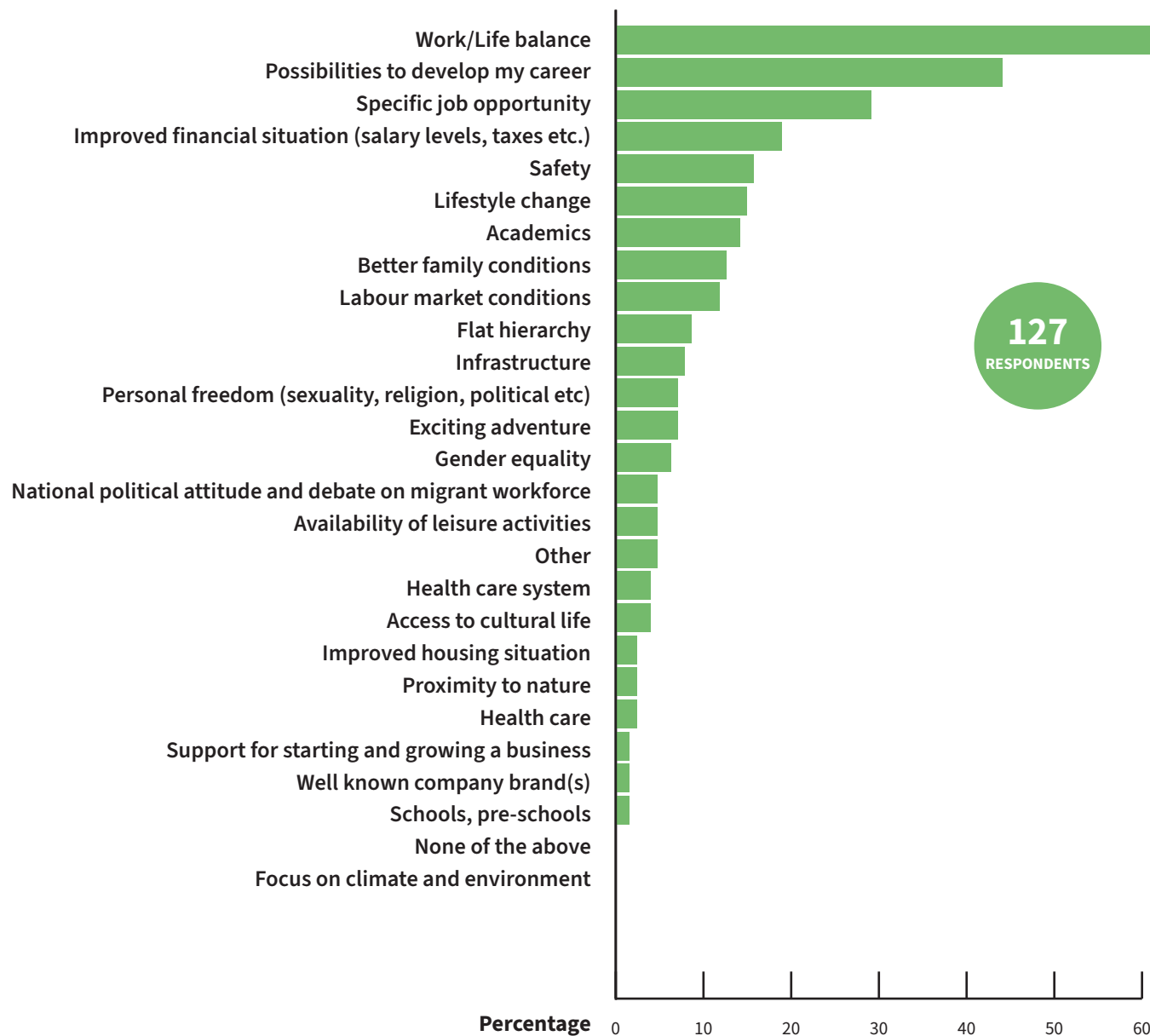
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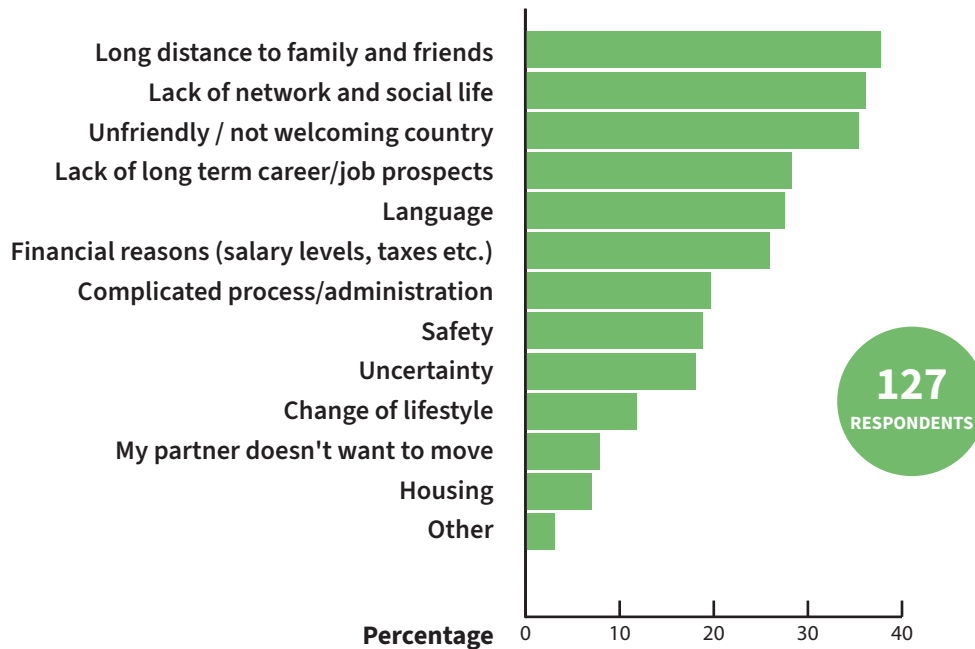
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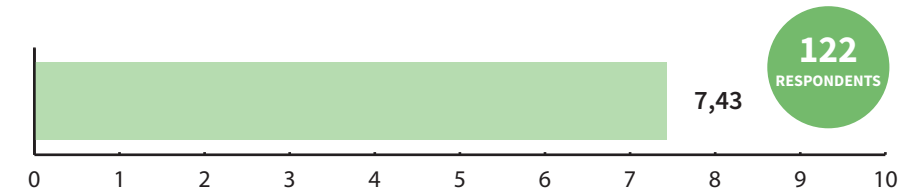
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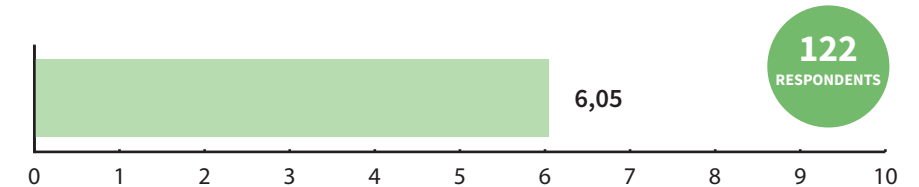
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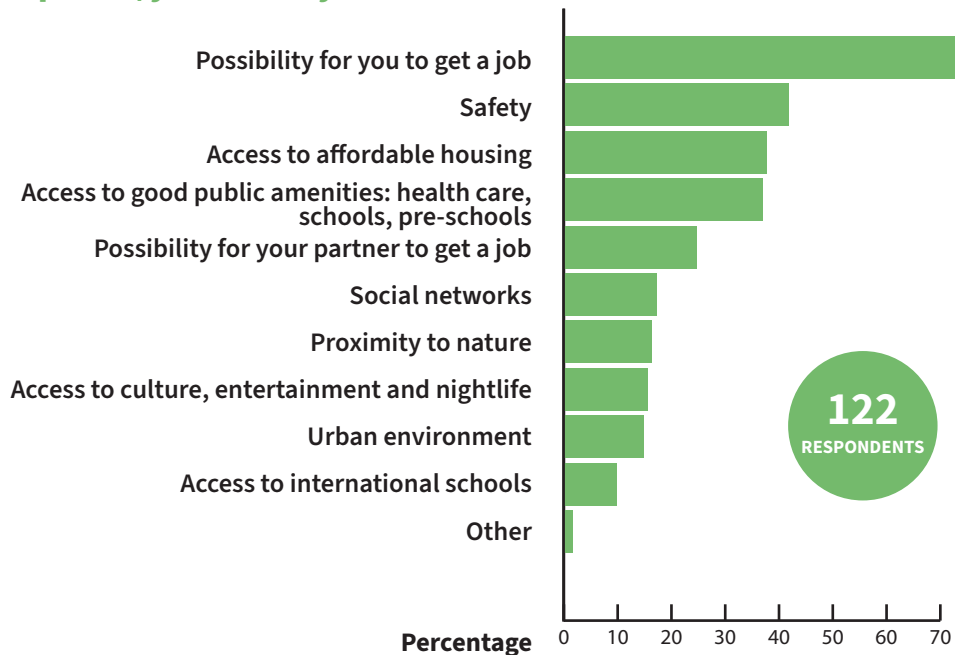
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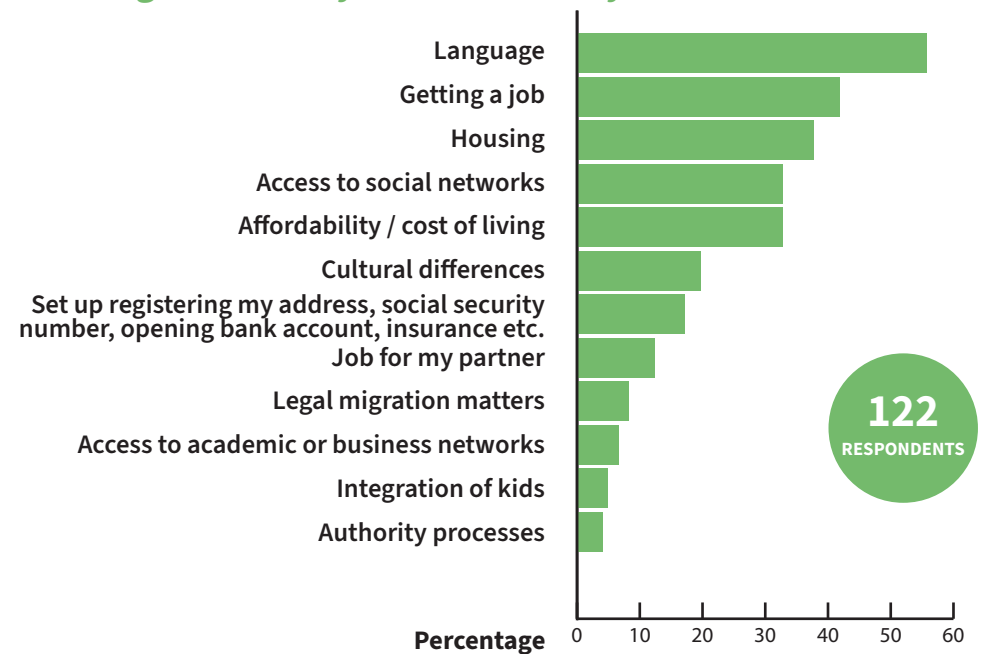
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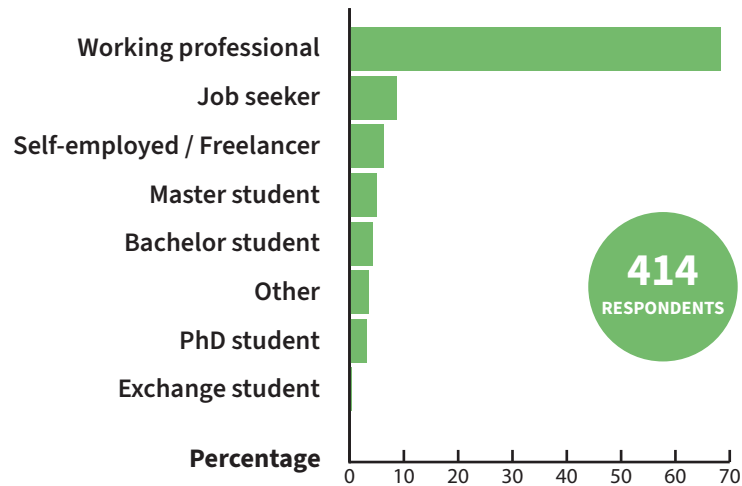
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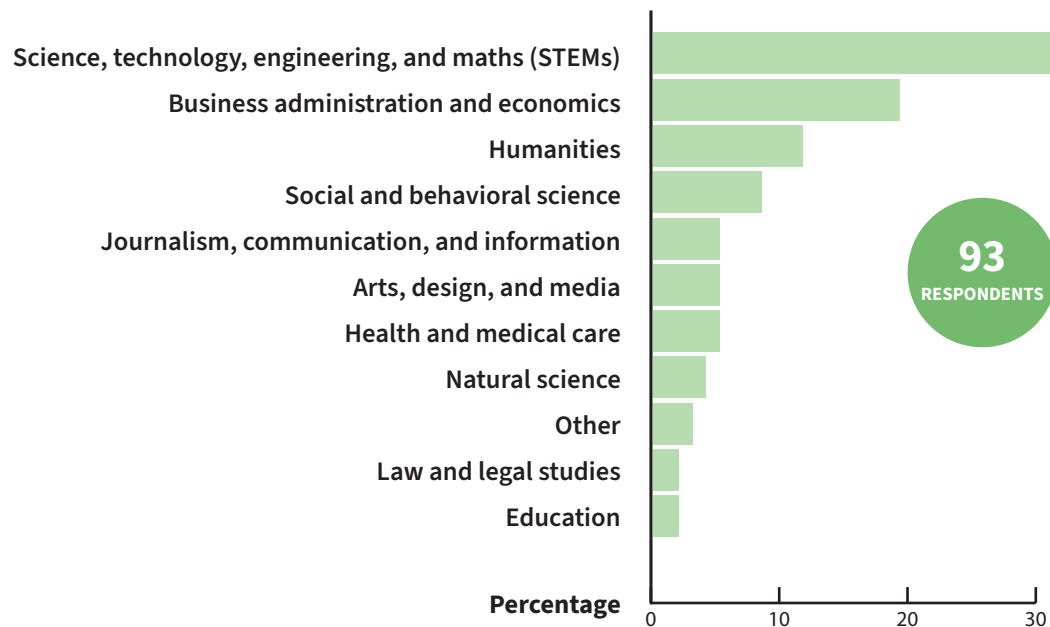
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What is your current primary status

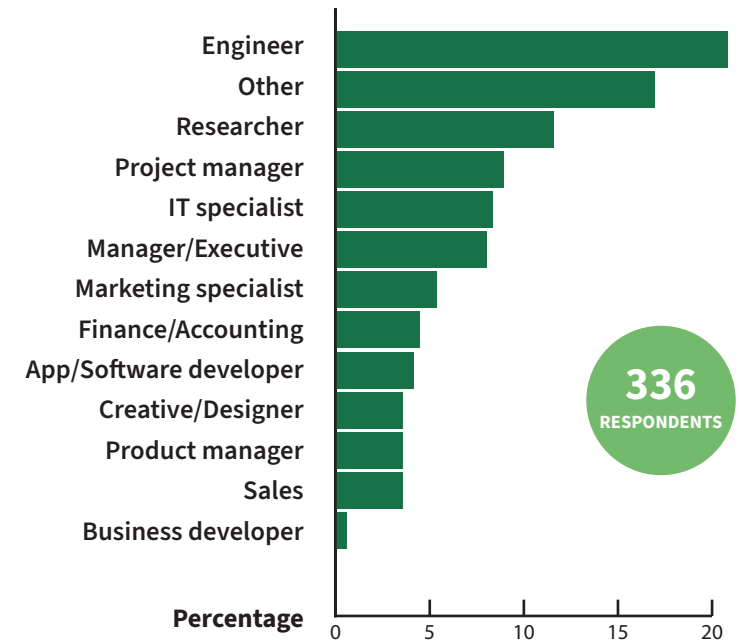


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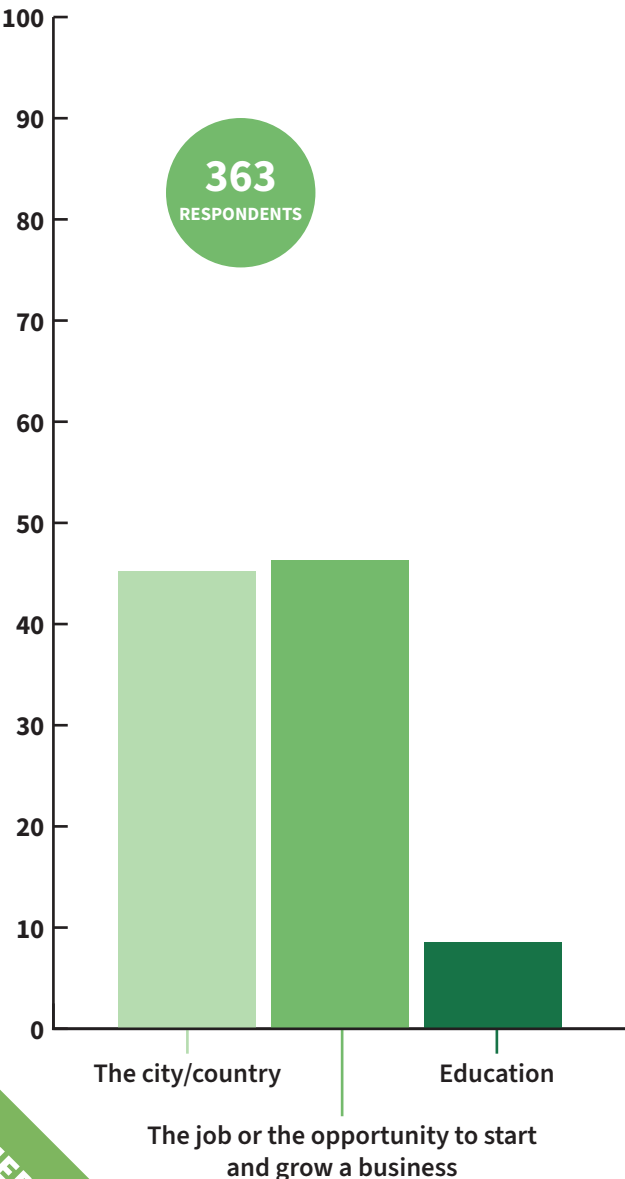


Netherlands

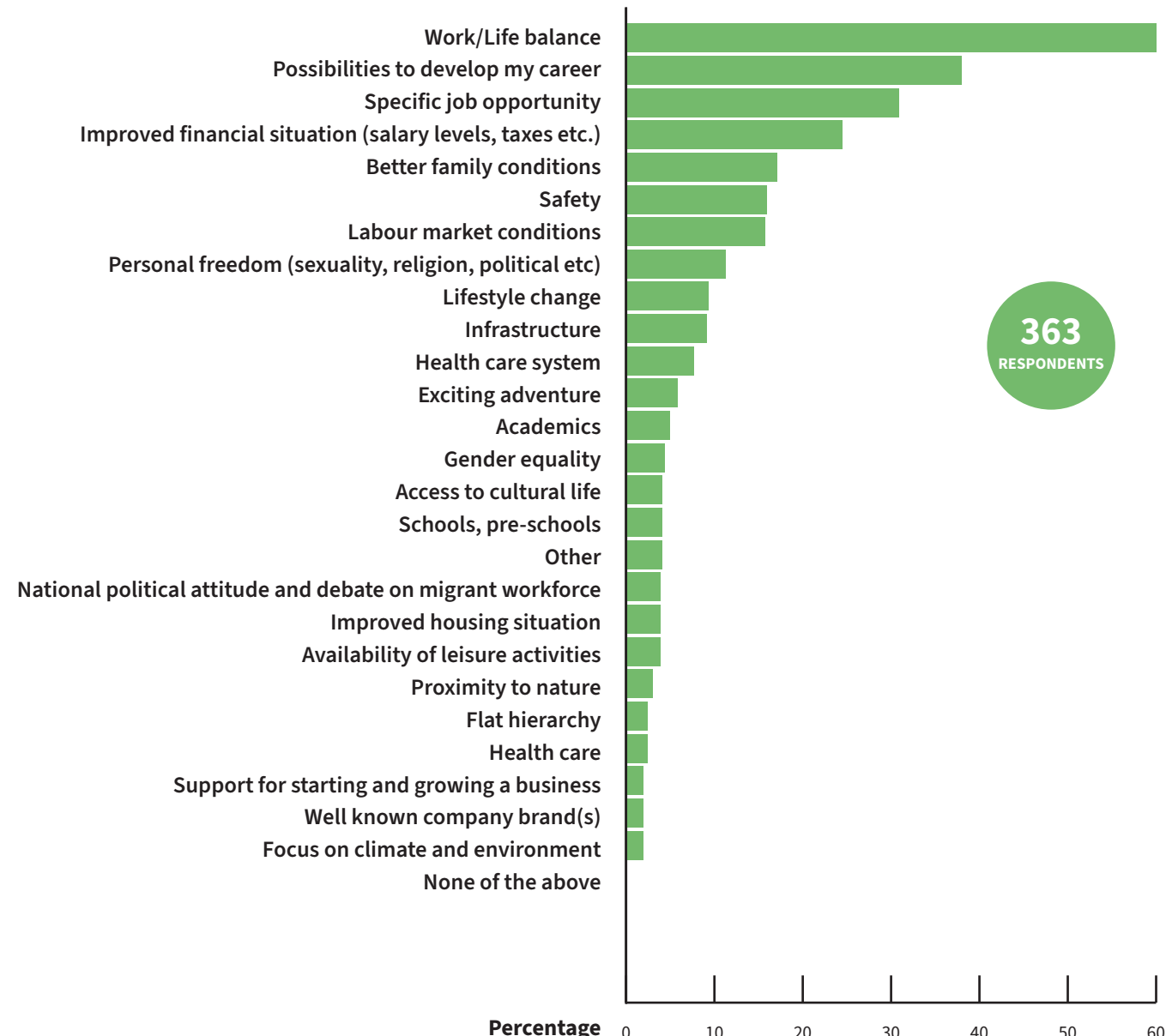
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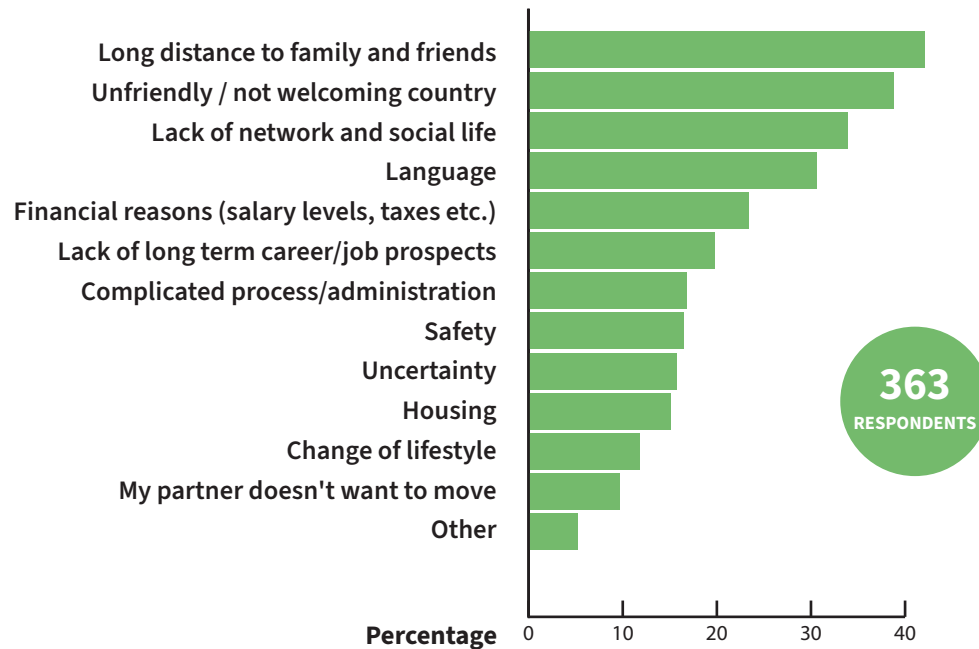
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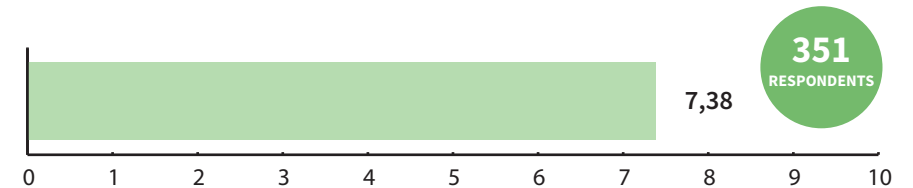
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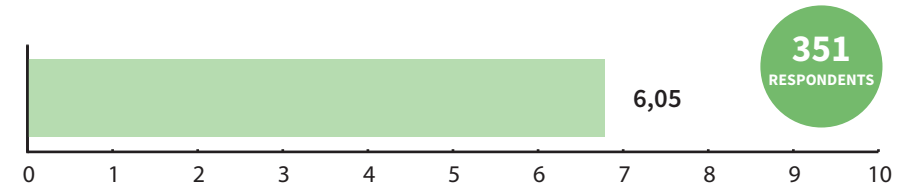
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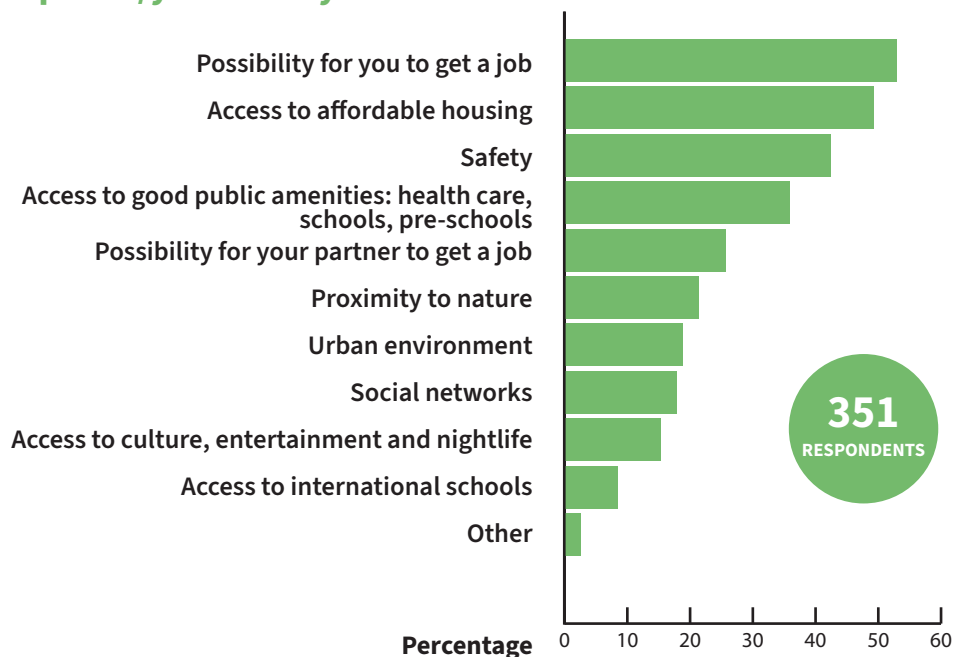
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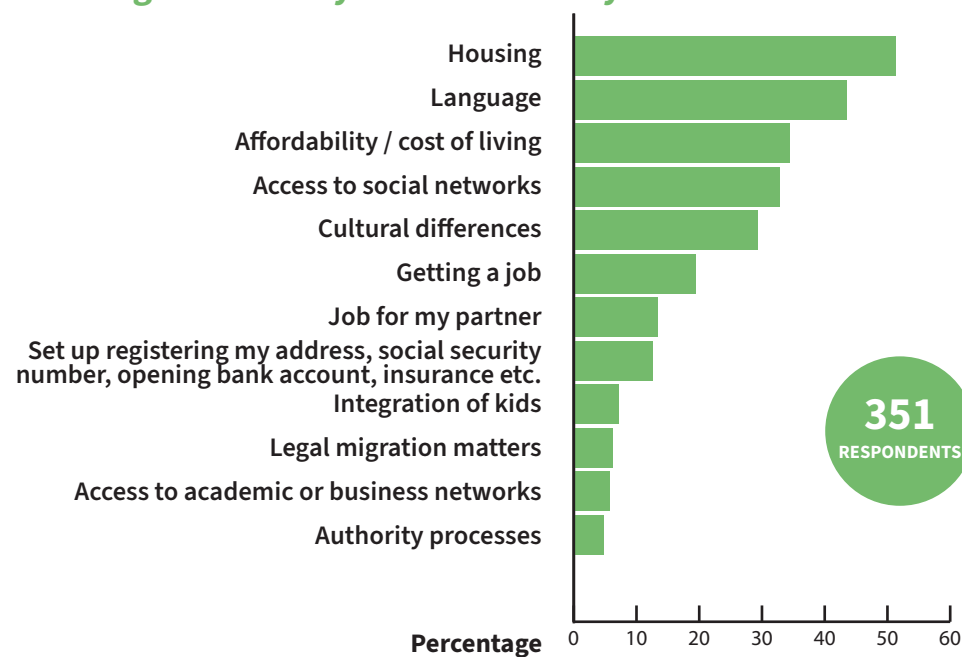
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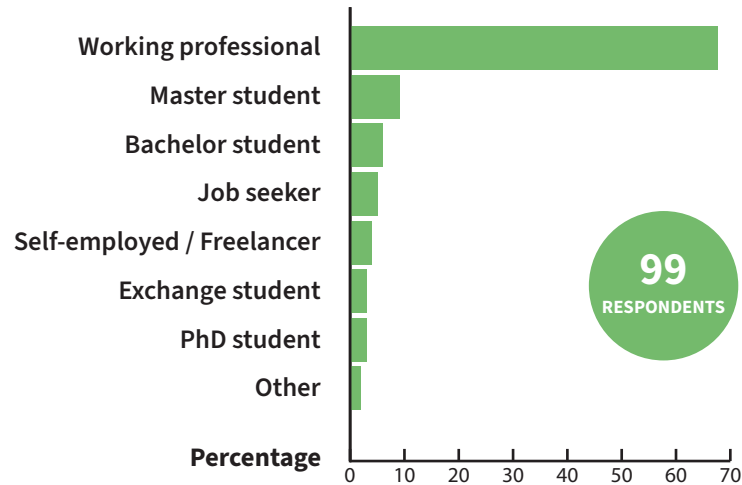
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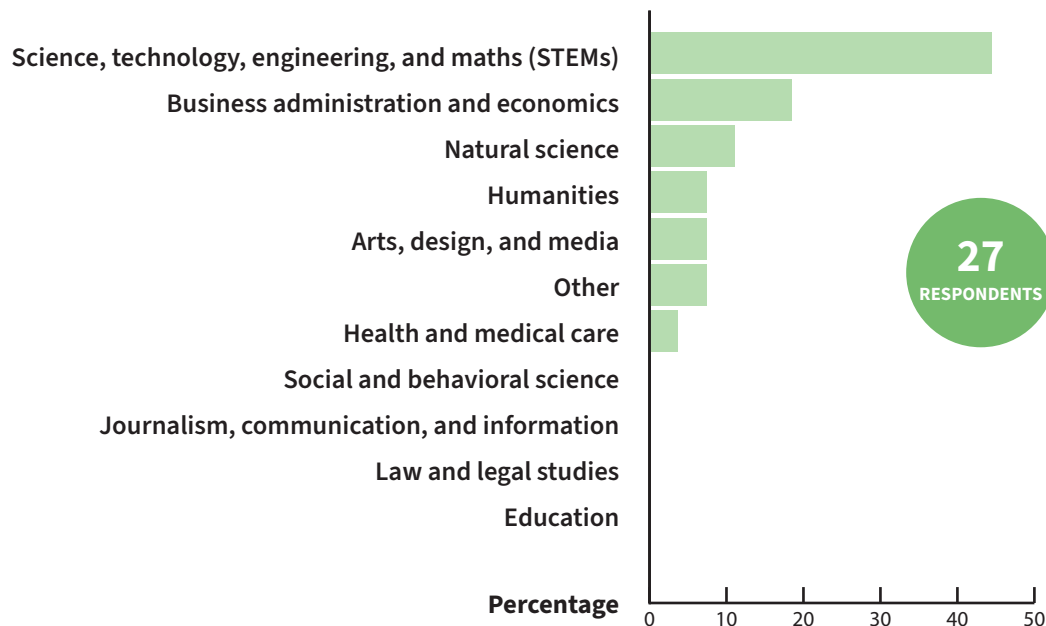


What is your current primary status

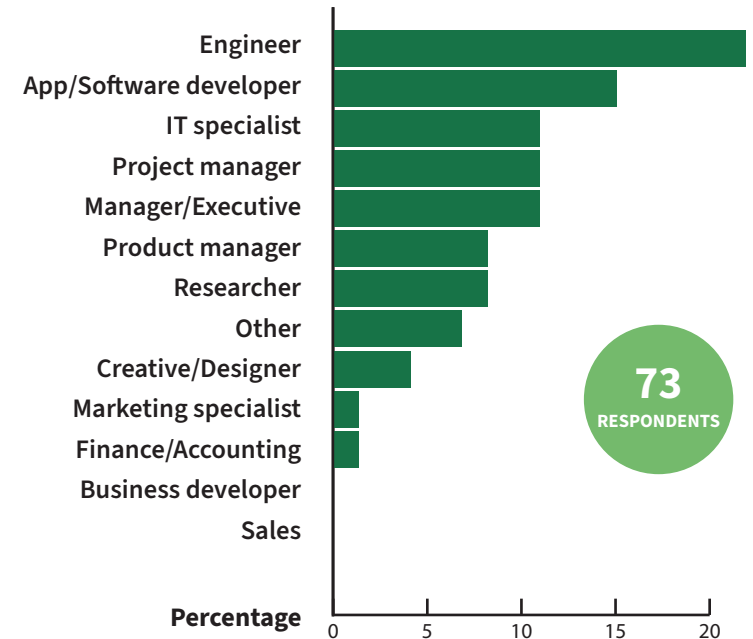


Germany

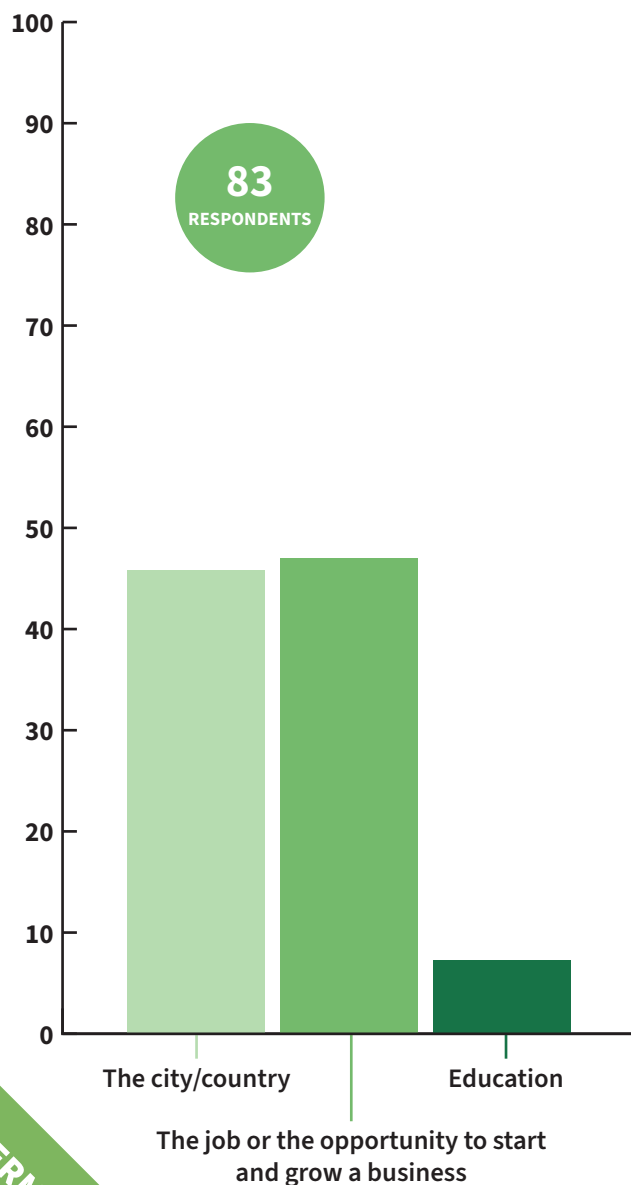
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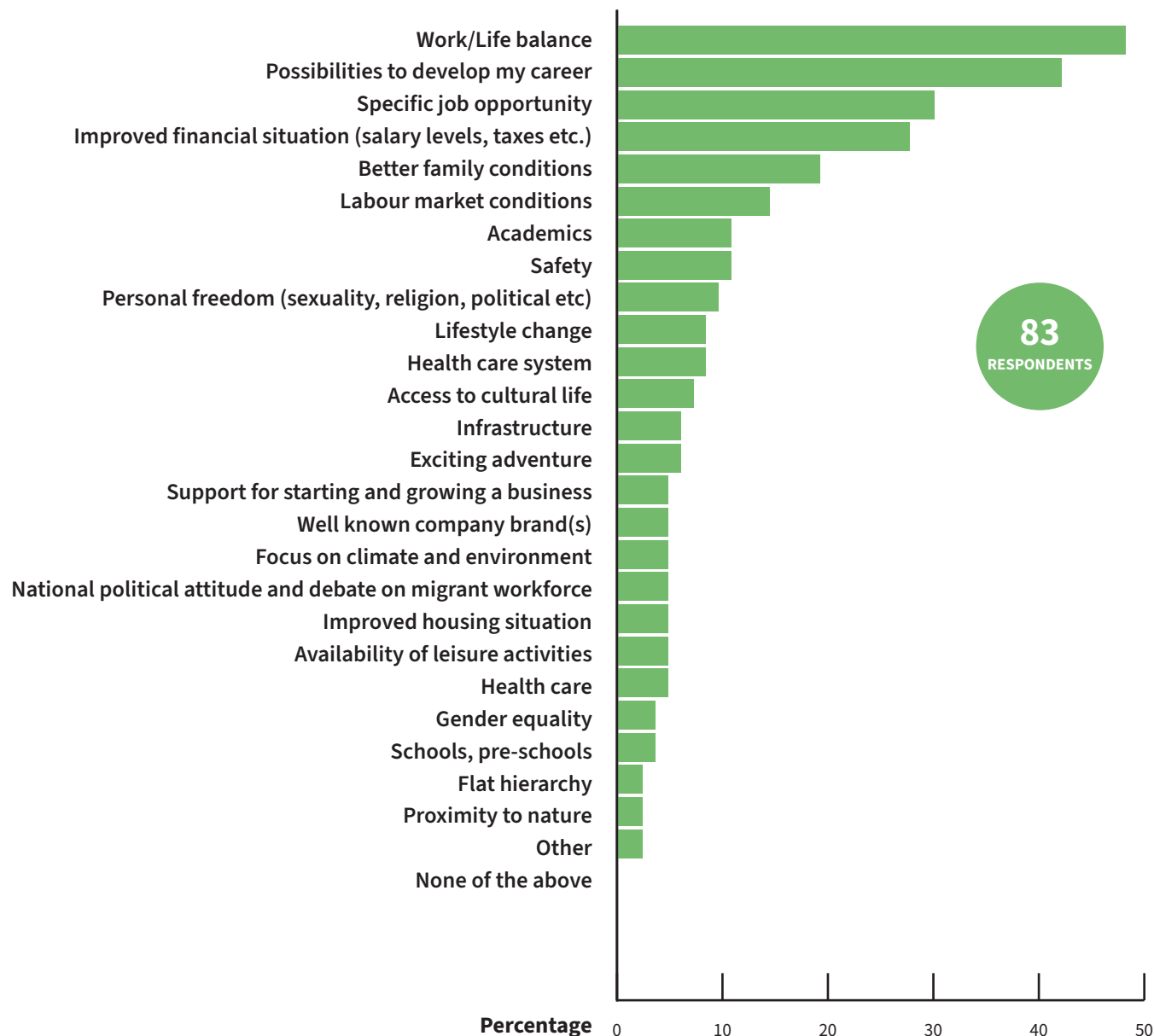
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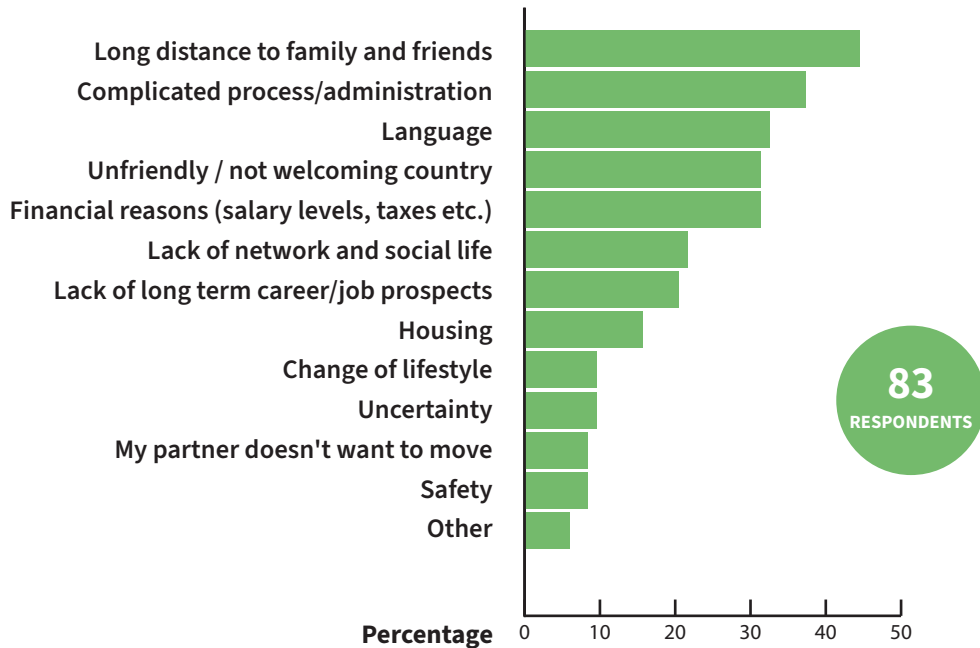
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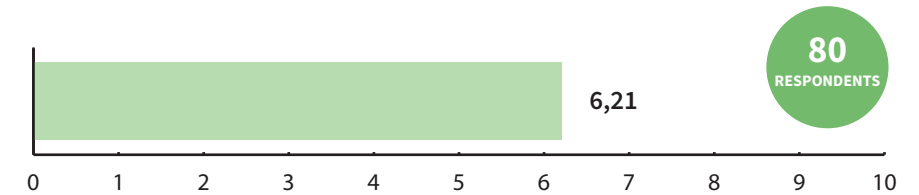
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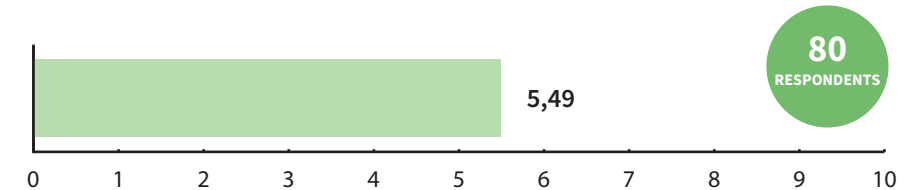
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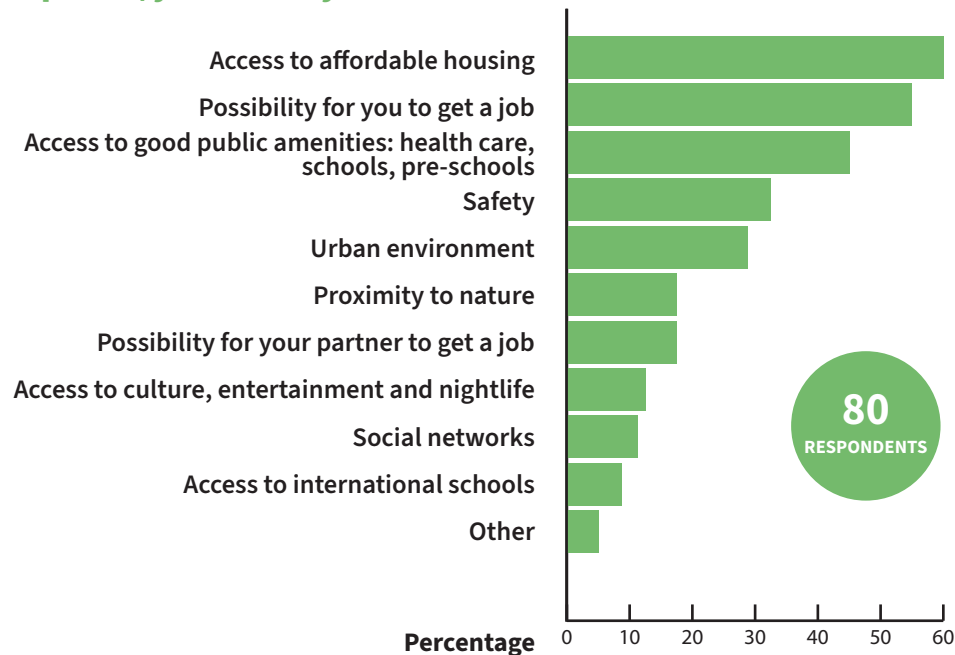
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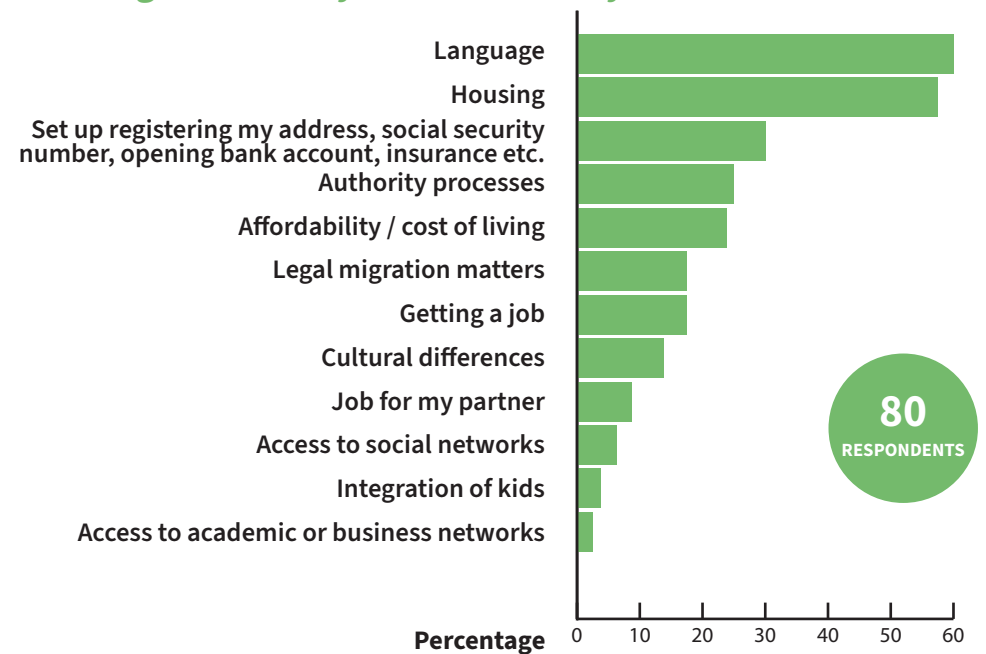
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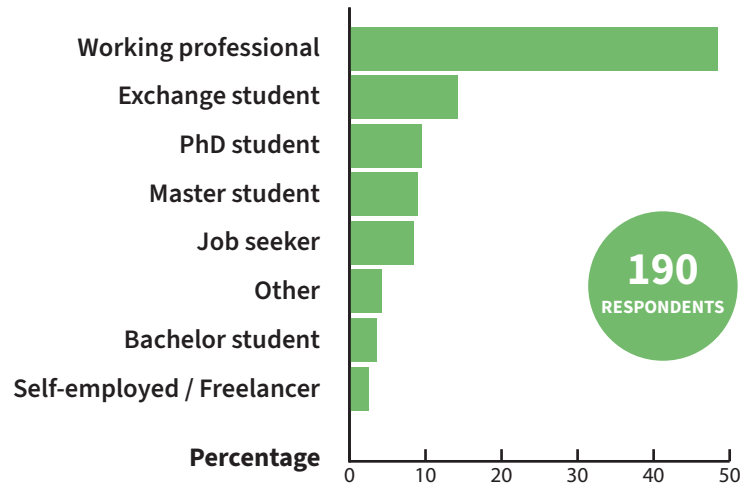
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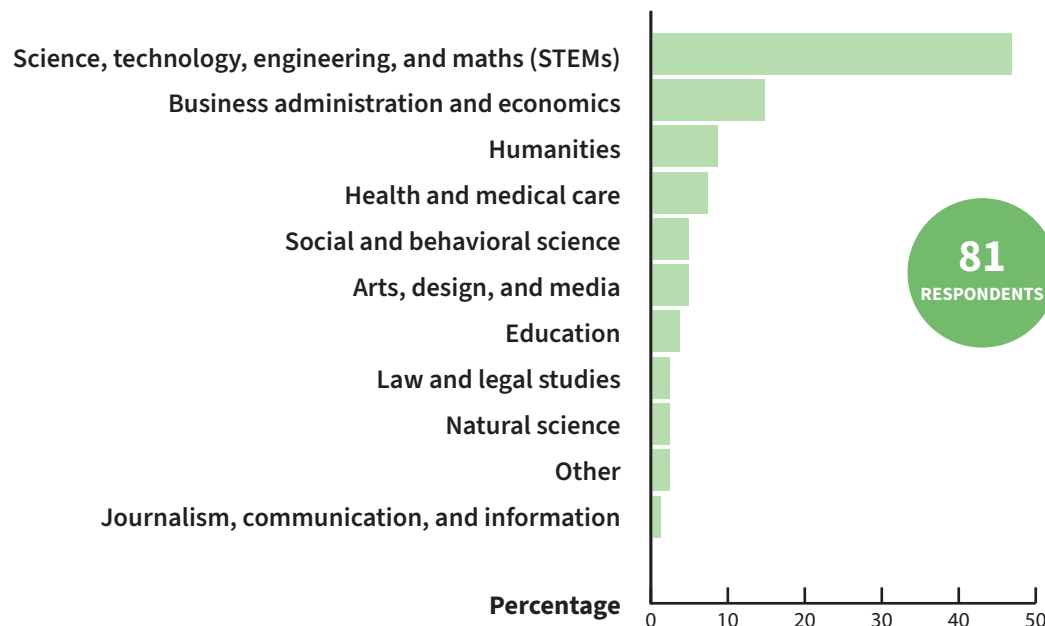


What is your current primary status

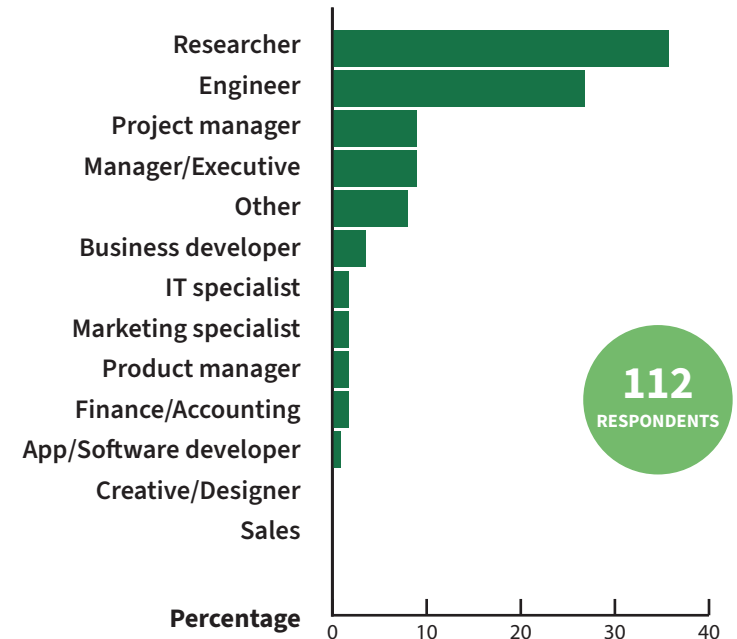


Spain (incl. the Basque Country)

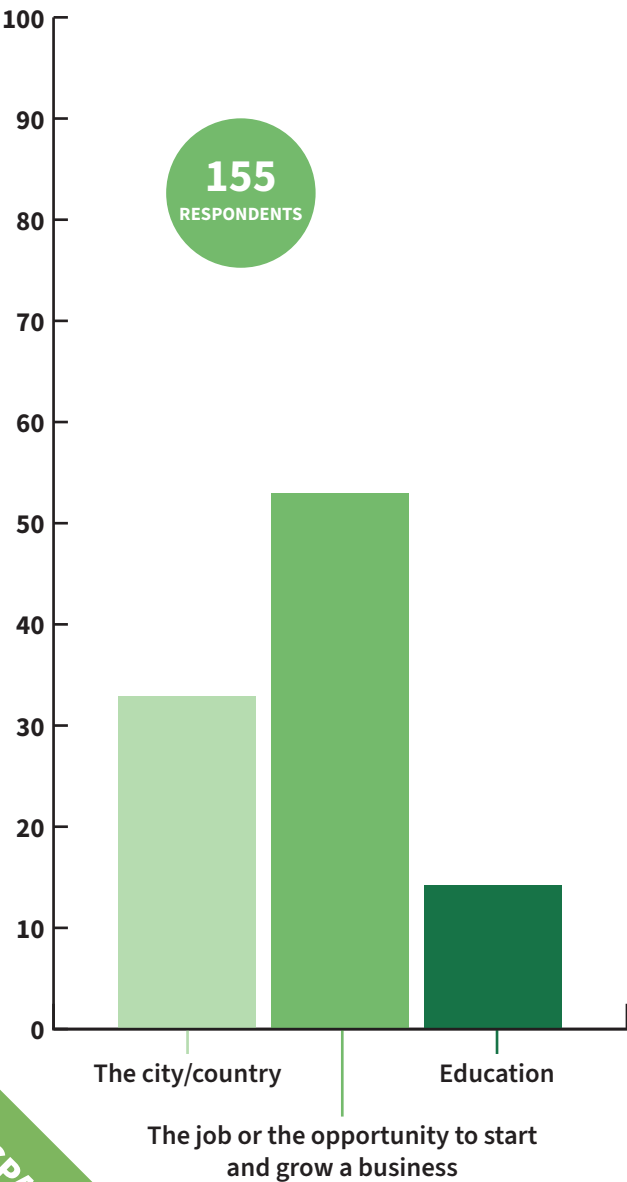
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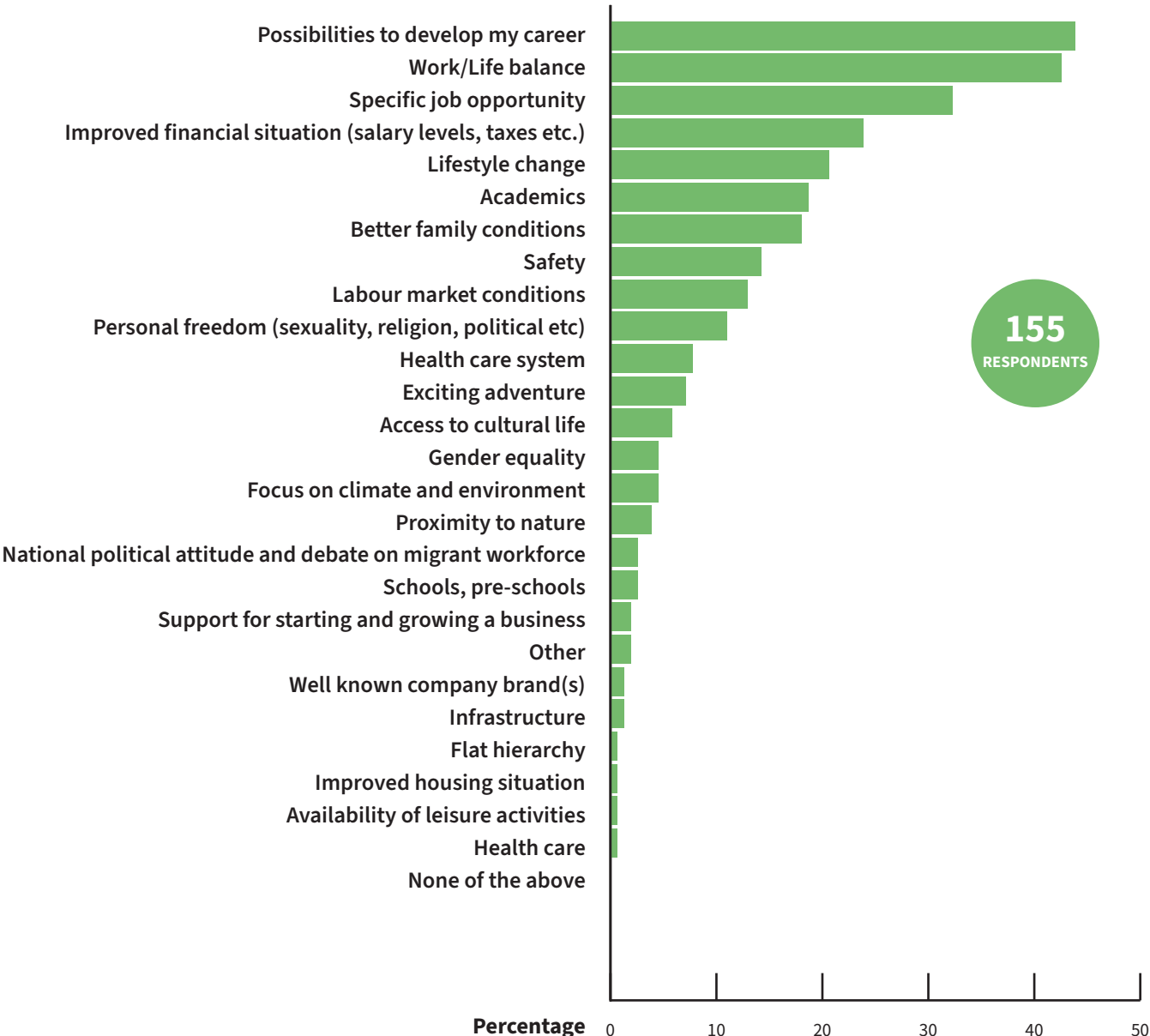
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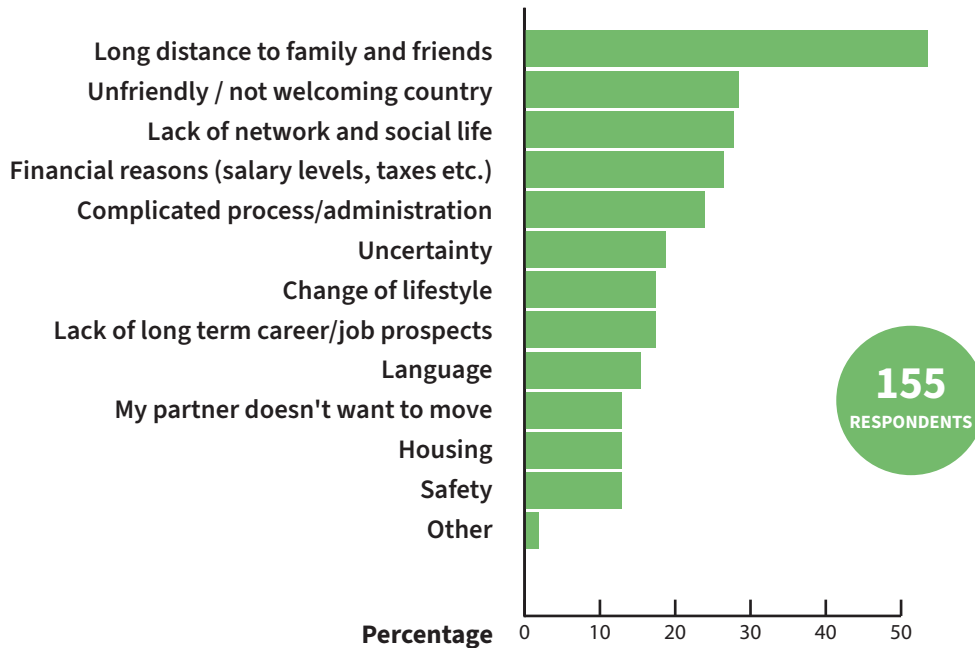


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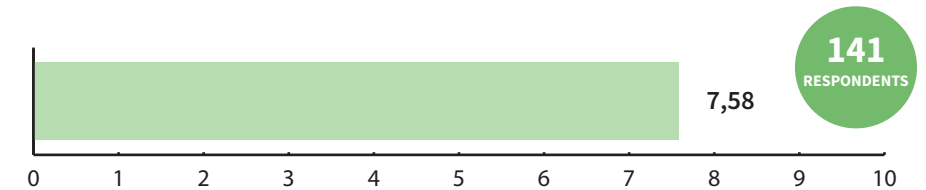


SPAIN
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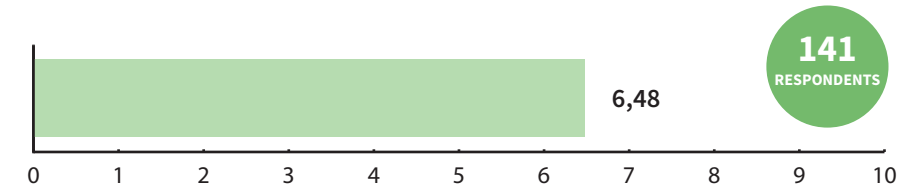
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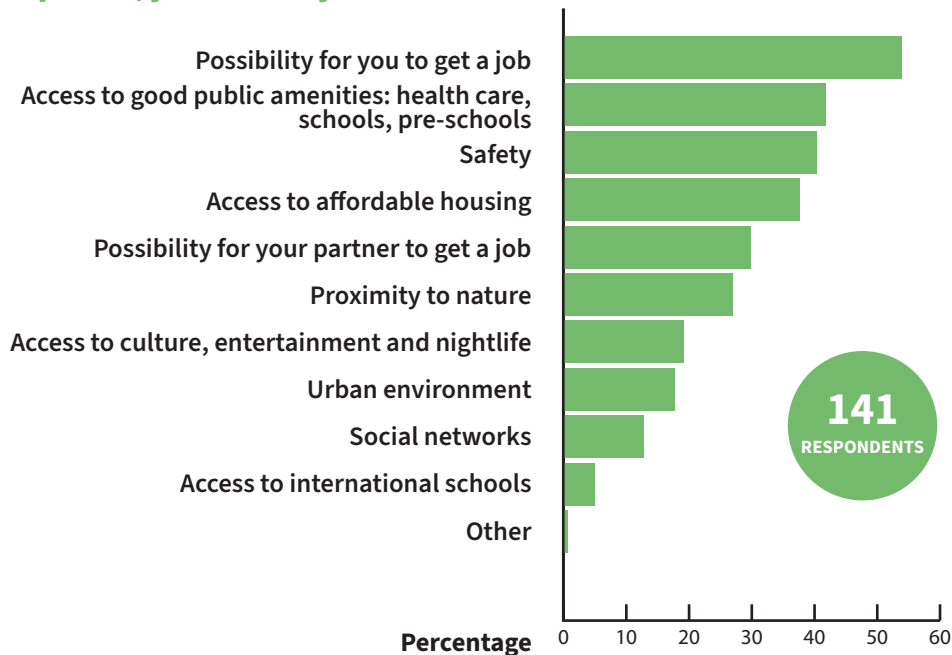
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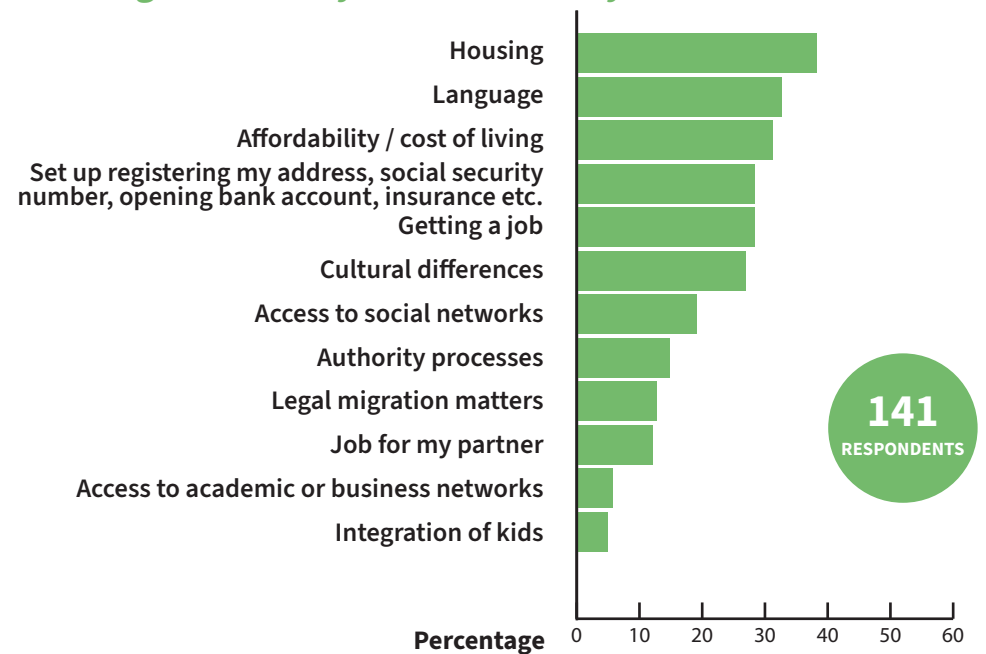
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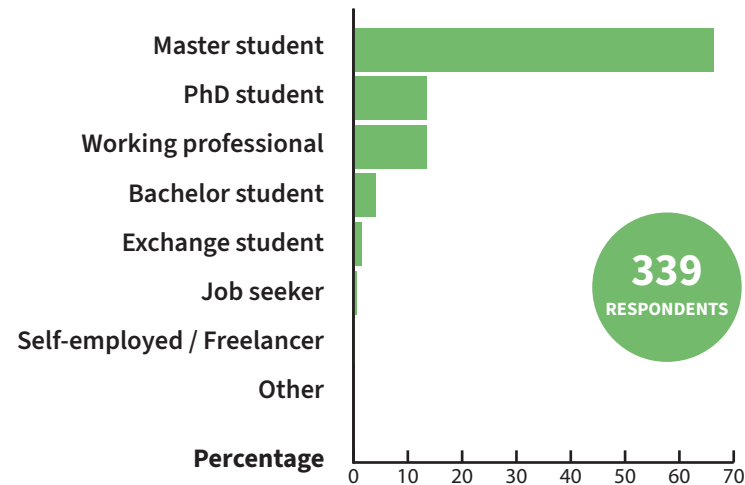
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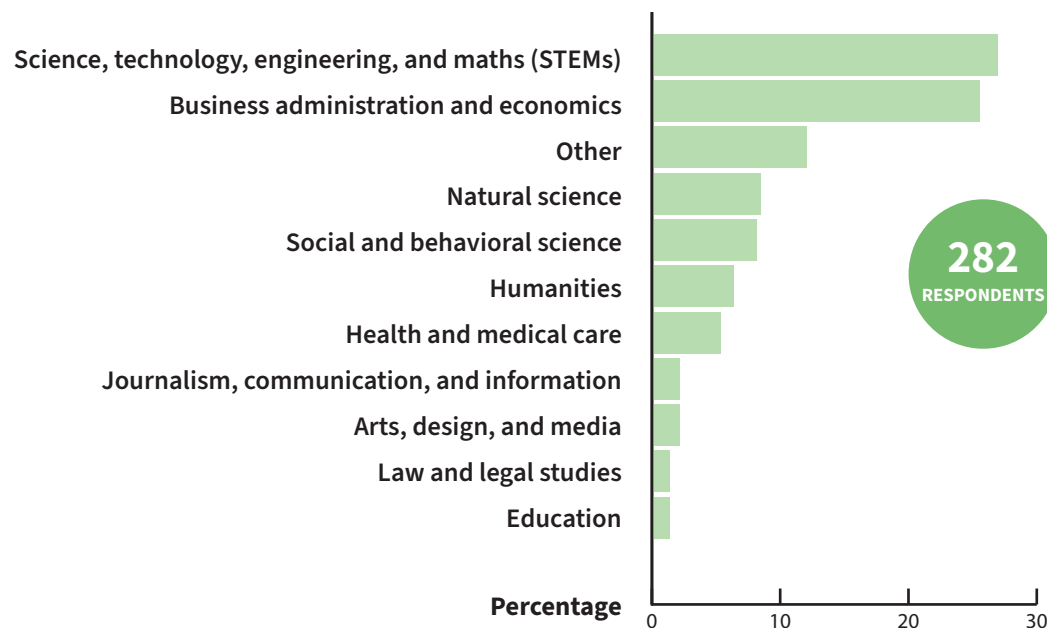


What is your current primary status

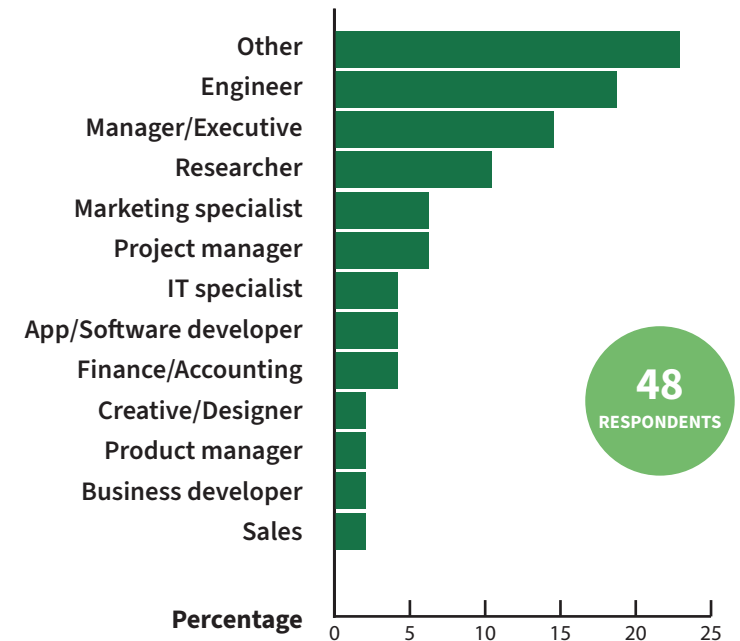


Scotland

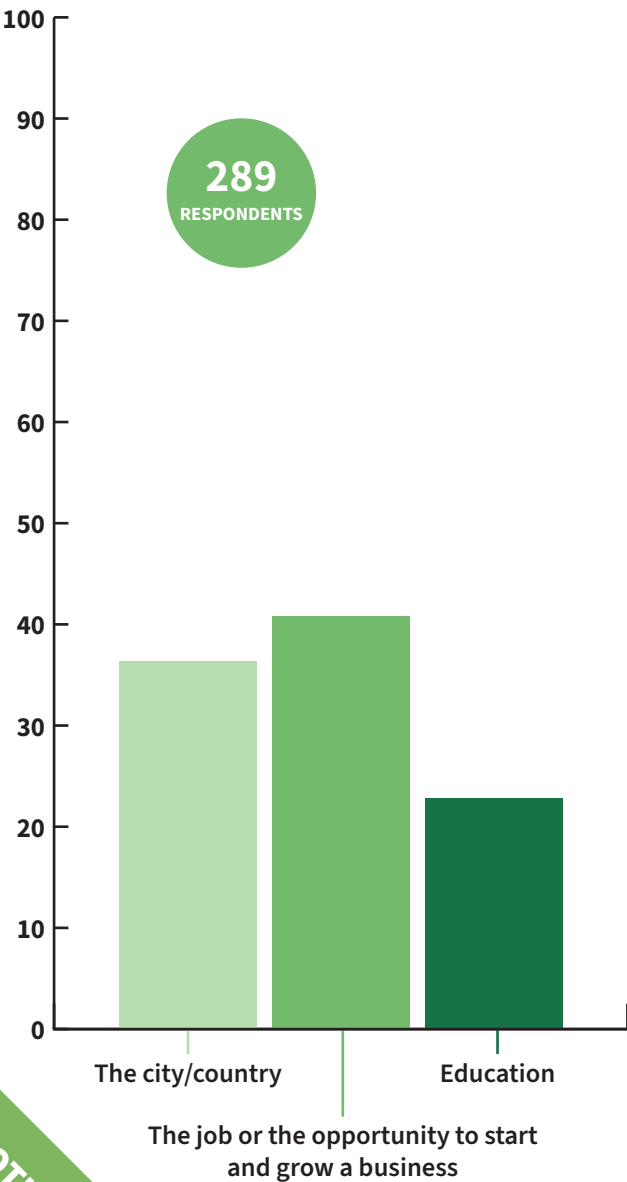
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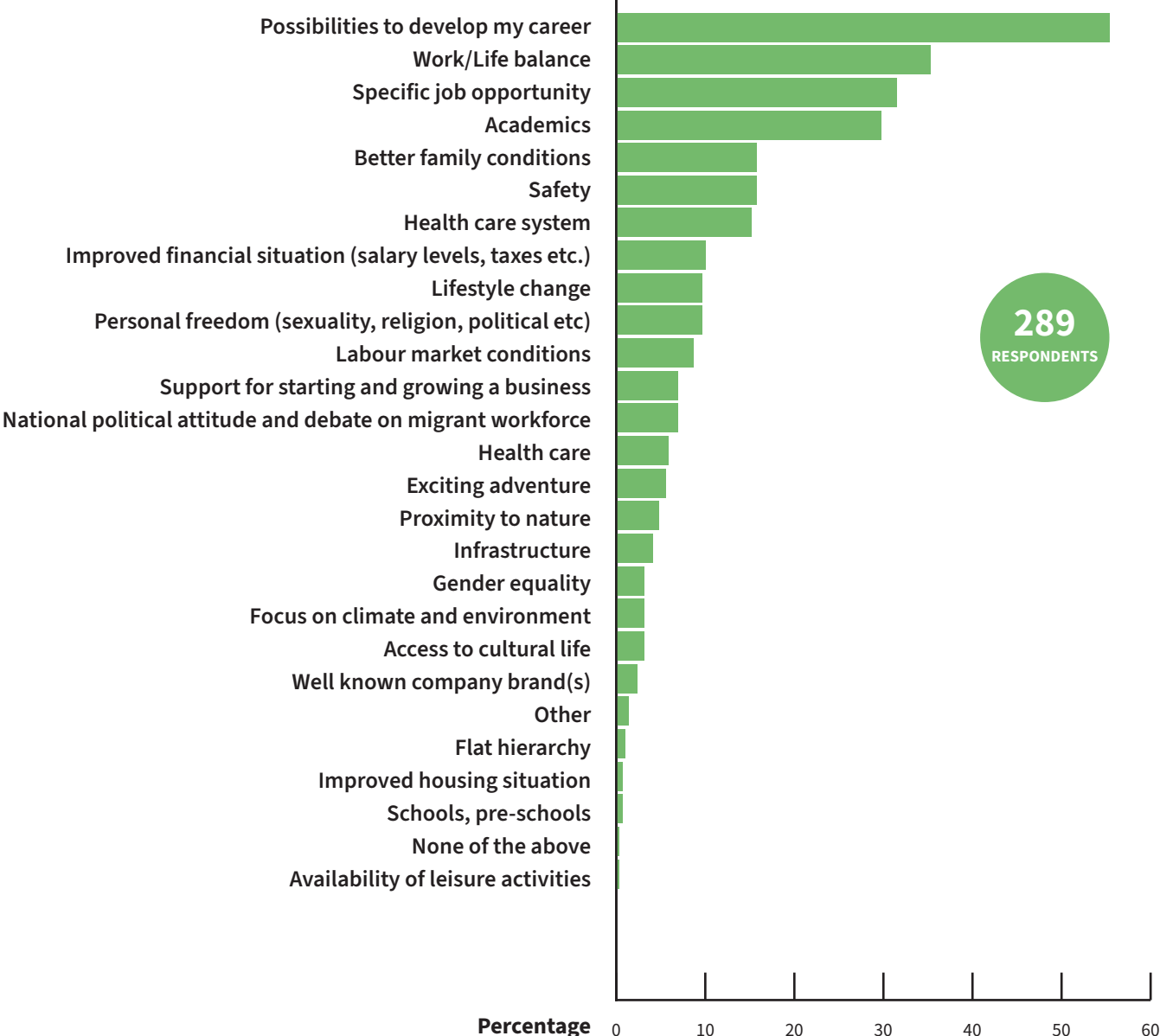
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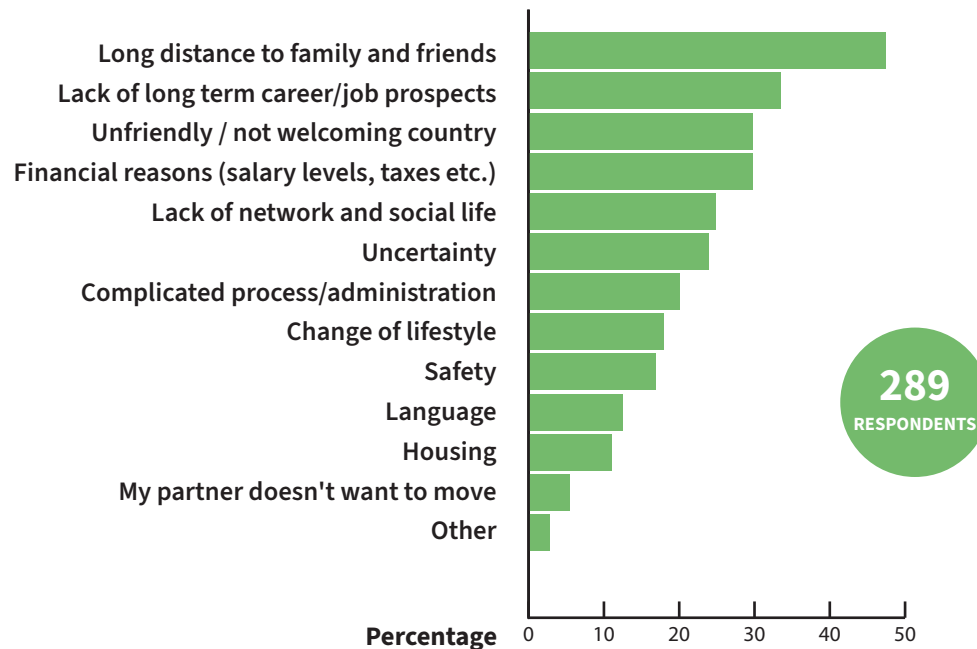


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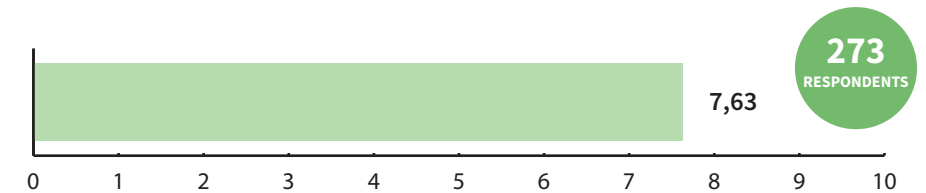


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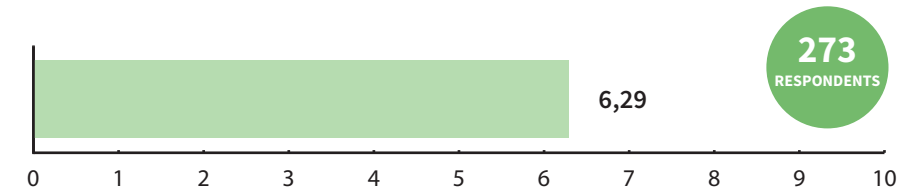
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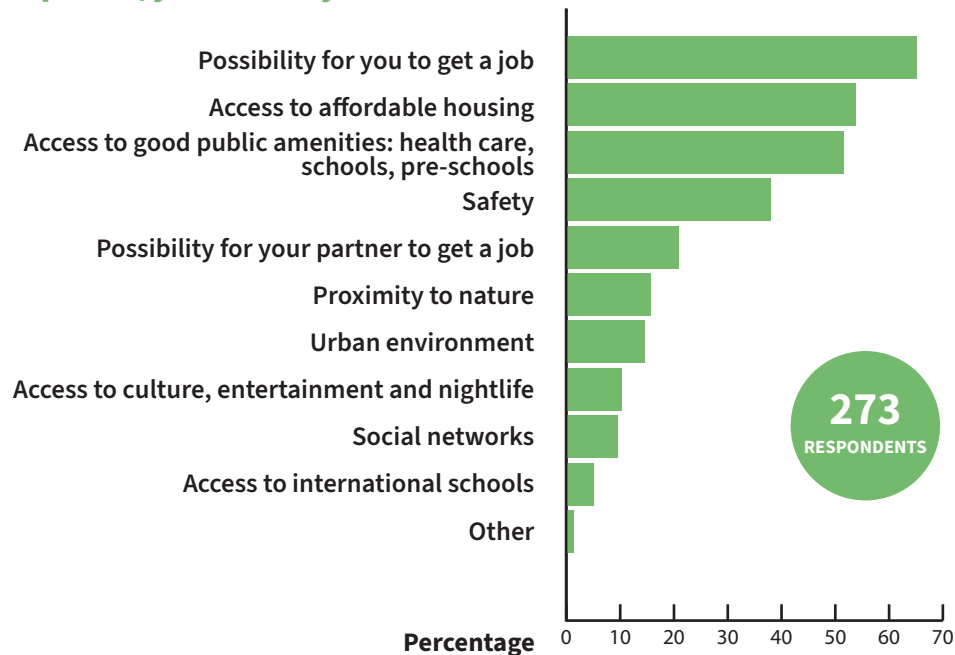
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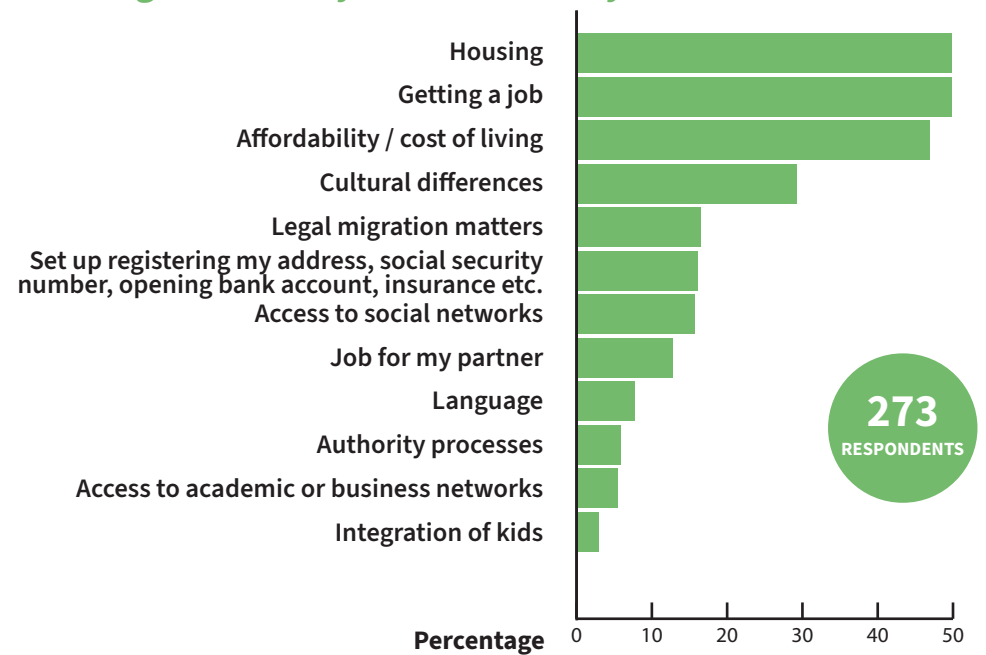
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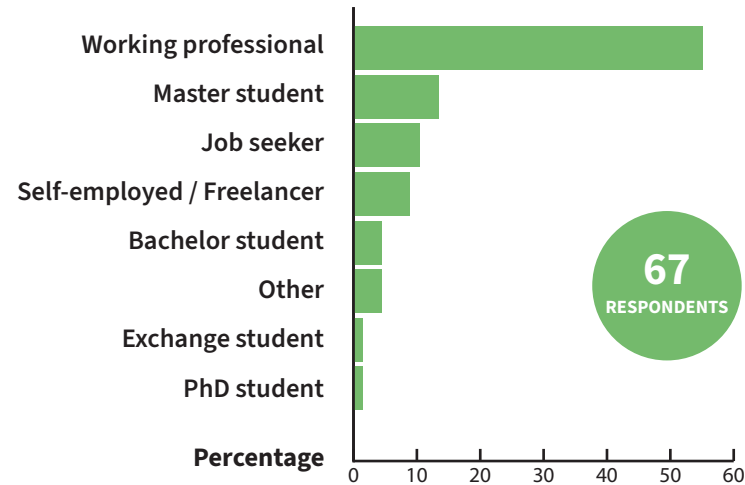


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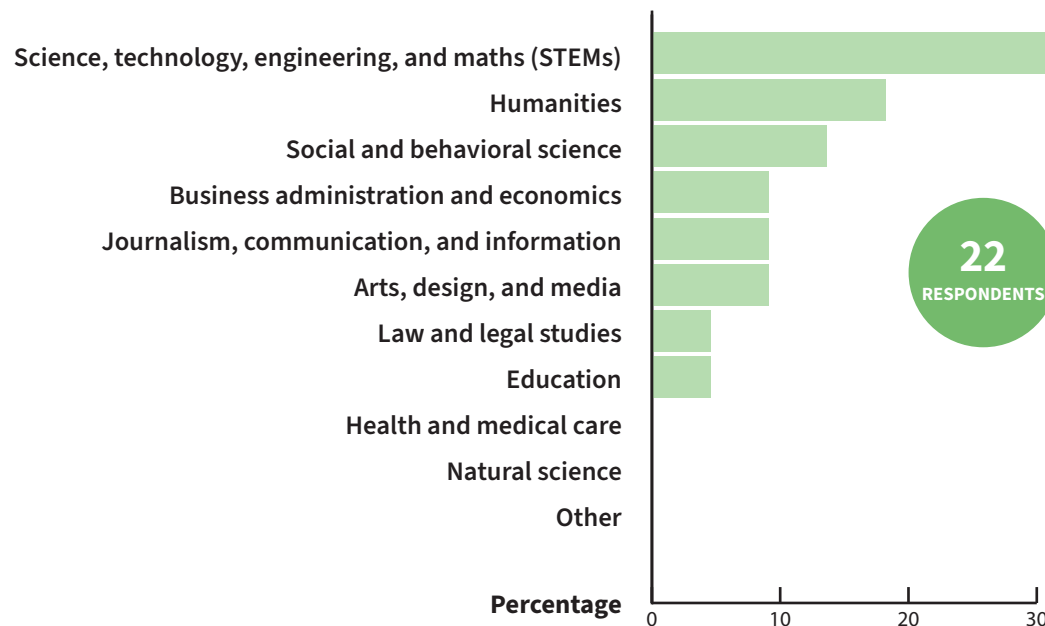


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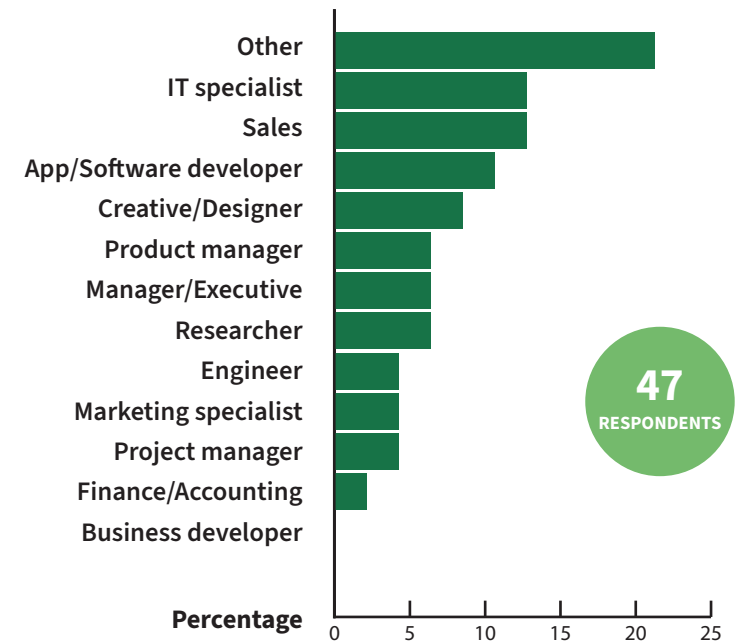
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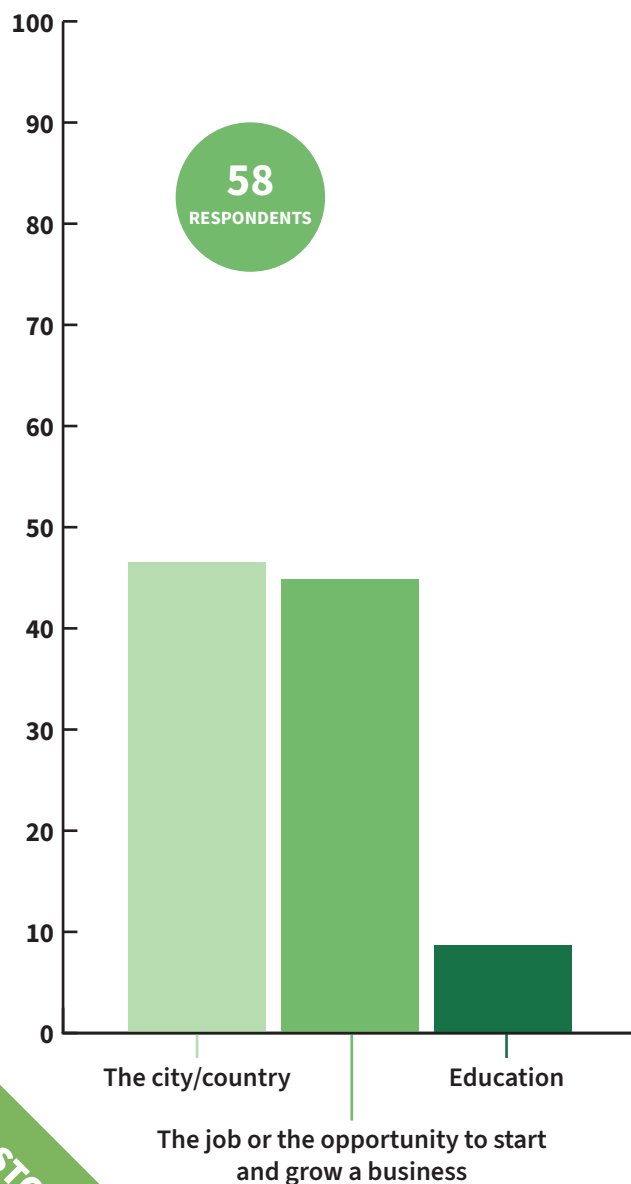
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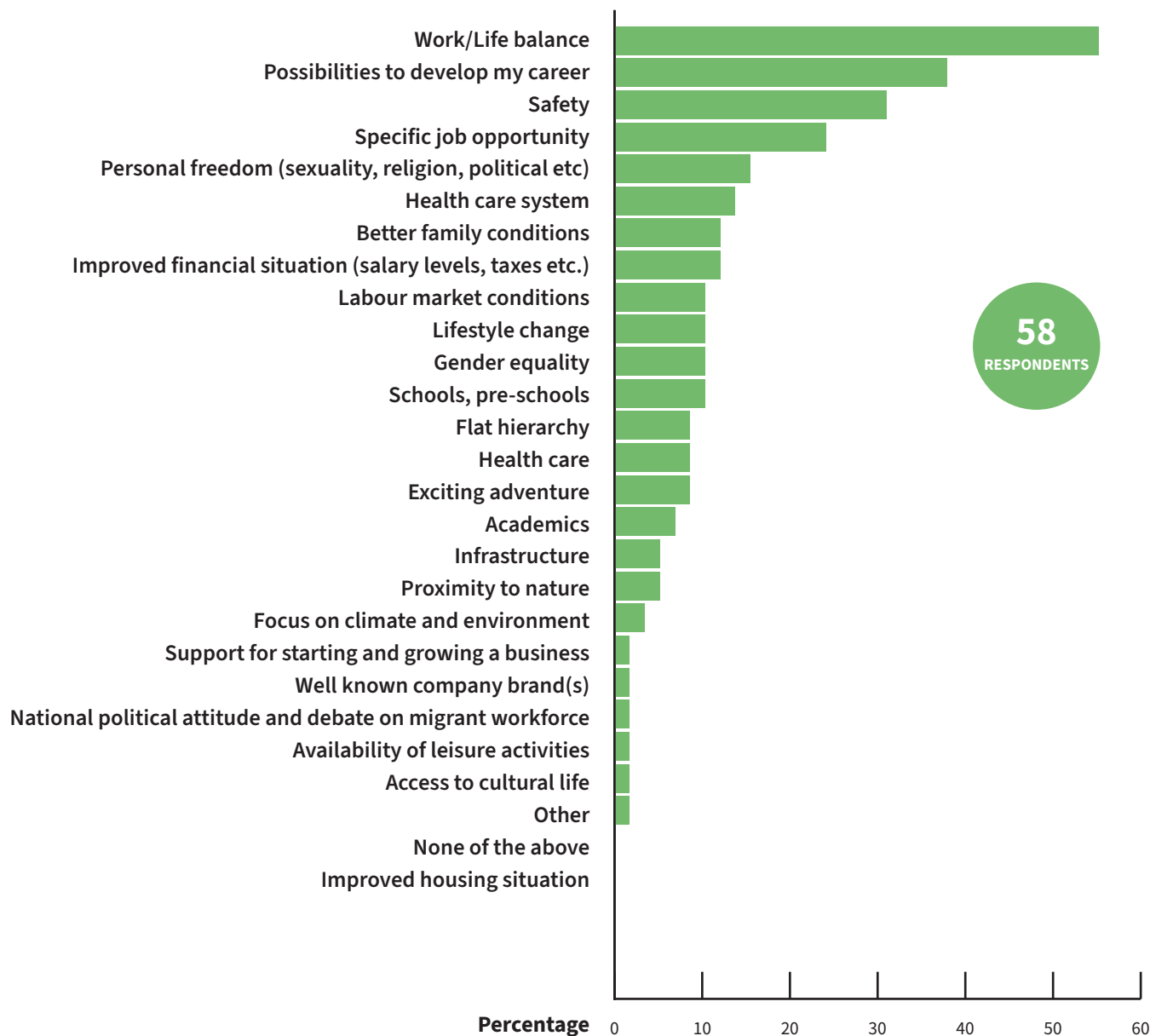
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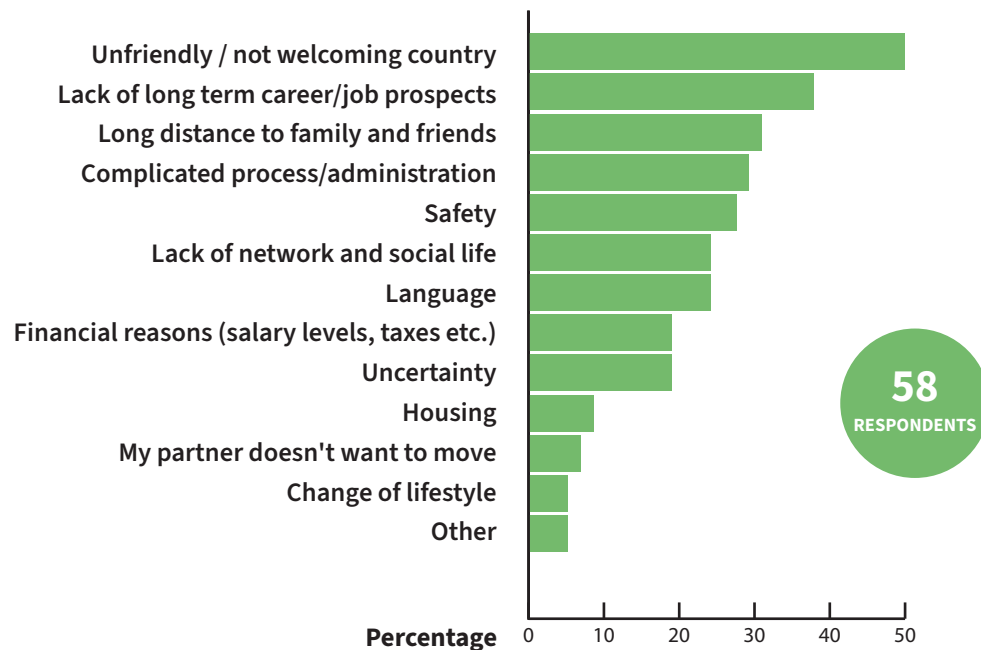
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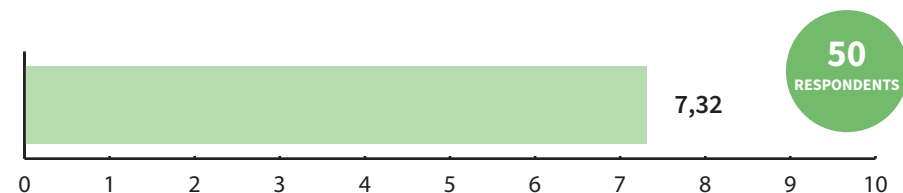
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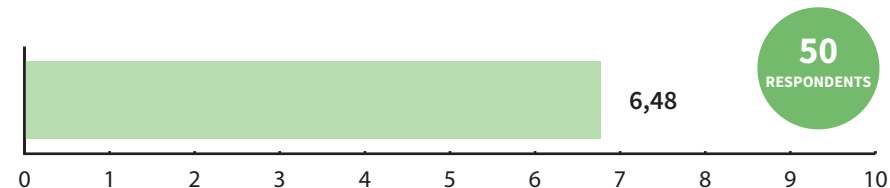
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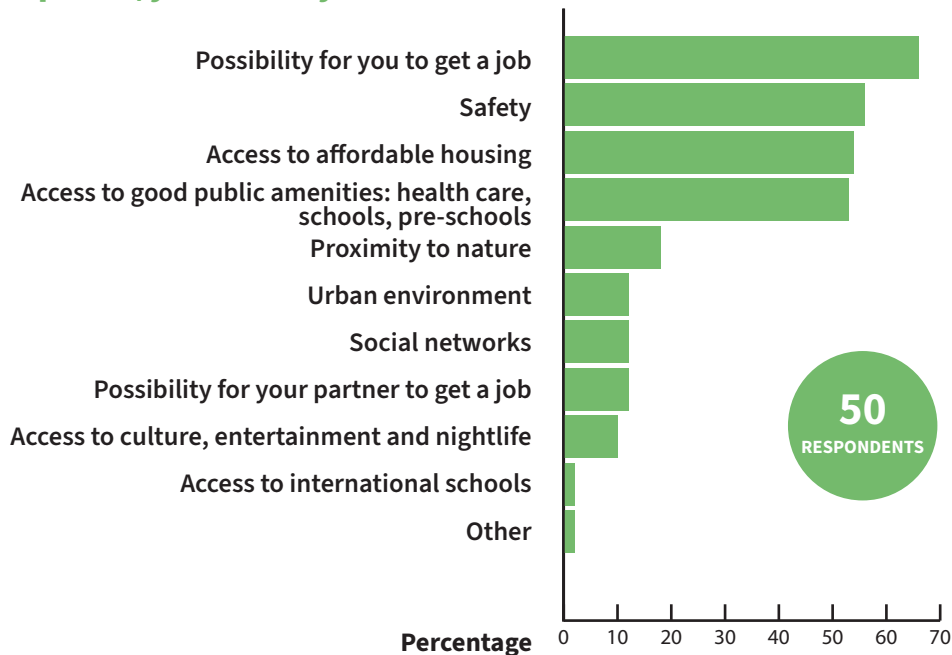
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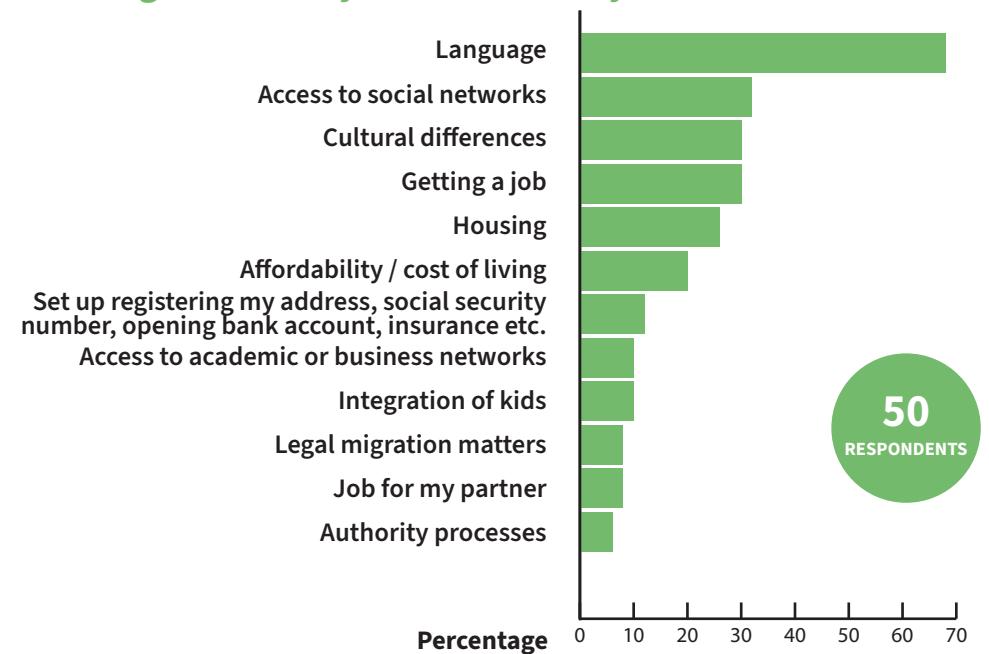
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To access the data, go to:
<https://www.europeantalentmobility.com>

Photographers

All images except the ones below are photographed by Crelle Photography, www.crelle.se at various events in Linköping Science Park. The image on page 26 is photographed by Pernilla Andersson. The images on pages 4, 16, 20 and 42 are from Unsplash.

With special thanks to

