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# Discussion Paper

## DEMOGRAPHIC CHANGE ON THE POLITICAL AGENDA OF THE EUROPEAN COMMISSION

Ann Zimmermann

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Demographic Change on  
the Political Agenda  
of the European Commission

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## TABLE OF CONTENTS

INTRODUCTION	1
1. CONCEPTUAL SPECIFICATIONS AND DEFINITIONS	2
2. POPULATION POLICIES AT THE EU LEVEL	3
2.1 Employment and social policies	4
2.2 Health policies	4
2.3 Migration within the field of justice and citizens' rights	5
3. DEMOGRAPHIC CHANGE AS AN AREA OF POLITICAL ACTIVITY IN THE EUROPEAN COMMISSION	6
3.1 DG Employment, Social Affairs and Inclusion (DG EMPL)	6
3.2 DG Health and Food Safety (DG SANTE)	8
3.3 DG Migration and Home Affairs (DG HOME)	8
4. DEMOGRAPHIC CHANGE IN CURRENT POLITICAL STRATEGIES AND GUIDELINES	10
4.1 Europe 2020	10
4.2 Political guidelines of the Juncker Commission	10
5. THE DEVELOPMENT OF DEMOGRAPHIC CHANGE AS A POLITICAL ISSUE OVER TIME	12
5.1 Ageing and health	12
5.2 Fertility and family	18
5.2.1 Family changes as demographic challenge	19
5.2.2 Family policies to deal with the consequences of demographic change	19
5.2.3 Family policies to influence demographic change	22
5.3 Legal migration	23
6. CONCLUSIONS	28
NOTES	29
REFERENCES	32

The aim of this discussion paper is to shed light on the demographic agenda of the European Commission. It is part of Population Europe's three-part discussion paper series, which provides in-depth insights into contemporary discussions among demographic experts from research, policy and civil society at the European level.<sup>1</sup> The first issue "Perspectives of Policy-Relevant Population Studies" (Population Europe 2012) was devoted to the research perspective and provided an agenda of the most urgent topics and innovative approaches in the field of policy-relevant population studies. This second issue offers insights into how demographic change is discussed as a political challenge at the European Union (EU) level, specifically the European Commission. The third issue will focus on the perspective of European civil society actors on the issue of demographic change (Population Europe forthcoming). Together the three Population Europe discussion papers provide an overview of how different actors approach the issue of demographic change and what the most important topics and aspects are from their point of view. This provides a foundation for informed exchange and discussions about one of the most pressing issues of our time, which requires close cooperation between different societal stakeholders to develop effective and sustainable solutions.

This discussion paper is divided into six parts. Chapter 1 provides basic conceptual specifications and definitions on how population policies and demographic change are understood in this paper. Chapter 2 describes the institutional set-up and framework of population policies at the EU level: What is EU population policy? What are the political responsibilities of the European Commission in the fields this paper is concerned with? Who are the most important institutional bodies dealing with these areas within the European Commission? Chapter 3 gives a short overview of how demographic issues are institutionally framed as areas of political action within the European Commission. Here the most relevant Directorates-General of the European Commission in terms of demographic change – within the focus of this paper – are presented, as well as how population policies are embedded in their portfolio. Chapter 4 sheds light on the role of demographic change in the current political strategies and guidelines of the European Commission. Chapter 5 represents the main part

of the paper and delineates how demographic change has developed as a political issue on the agenda of the European Commission over time. Here the focus is not on implemented population policy measures, but on how demographic issues are discussed: Which topics are high on the political agenda? Which aspects are raised? Which approaches are proposed to deal with the problems identified? How did the debate develop over time? Finally we will provide some conclusions in chapter 6.

The aim of this paper is not to assess and evaluate how well the European Commission is dealing with the issue of demographic change, but to show how demographic change is discussed as a political issue at the European level. Therefore the sources we use are from the official representation of the European Commission in the form of their website and their publications, like White Papers, Communications and other relevant official reports.

## 1. CONCEPTIONAL SPECIFICATIONS AND DEFINITIONS

To understand how demographic change is discussed at the political level in the EU, this paper focuses on the European Commission as the executive body that proposes and develops policies and legislation, and represents the interests of the EU as a whole: “The Commission is centrally involved in EU decision-making at all levels and on all fronts. With an array of power resources and policy instruments at its disposal, and strengthened by the frequent unwillingness or inability of other EU institutions to provide clear leadership, the Commission is at the very heart of the EU system” (Nugent 2010: 105).

It is quite difficult to clearly define population policy, since it is a typical example of an umbrella policy that includes a number of different policy fields. It can be described as government policies designed to affect the size, composition, distribution and growth rate of a population.<sup>2</sup> Or as Demeny (1975: 147) framed it: “Population policies are customarily defined as purposeful measures aimed at affecting demographic processes, notably fertility, mortality, and migration.” More specifically May (2005: 828) proposes defining population policies as “direct or indirect actions taken in the interest of the greater good by public authorities in order to address imbalances between demographic changes and other social, economic, and political goals.” In this paper we have a similar perspective, since we only concentrate on those population policy issues that are discussed directly in regard to the question of how to mitigate the consequences of demographic change. Concerning demographic change we focus on the ageing of societies, which means the median age of a population increases because of an increasing number of older people (due to increasing longevity) and a comparably lower number of younger people (due to decreasing fertility levels).

On the topical level we look at discussions about how to deal with demographic change in three issue fields that correspond to the basic demographic processes of mortality, fertility and migration, namely: (1) ageing and health, (2) fertility and family, and (3) migration. From this more narrow approach, policy fields of particular relevance for this paper are economic and social policies, health policies and migration policies which refer to demographic change.<sup>3</sup>

Within the area of population policies one can distinguish between (1) direct political actions that set out to affect demographic change as such or address its consequences directly, and (2) indirect actions, which are not aiming to influence demographic change directly, but may have the effect of doing so. In this paper we are only concerned with the discussion about direct political actions, namely with political actions discussed in relation to demographic change. A further important distinction of population policy measures is the one made by Mayer (2011) between administering and designing<sup>4</sup>, which is similar to the distinction made by May (2005) between passive and active measures. Administering or passive measures centre around adapting to the effects of population change, for example, through the promotion of education and employment or the development of infrastructure strategies. In contrast, active or designing measures address the causes of population changes and are intended to influence basic demographic conditions and trends, such as health or the level of fertility.

To summarise this discussion paper focuses on the question of how demographic change (in the form of population ageing) is institutionalised on the level of the European Commission as a field of political activity and which approaches (in the areas of ageing and health, fertility and family, and migration) are discussed over time to alleviate the consequences of demographic change for European societies.

## 2. POPULATION POLICIES AT THE EU LEVEL

In general the EU is active in a number of policy fields as shown in Table 1. If we define population policy in a narrow sense (see chapter 1), three of these policy fields are particularly relevant: employment and social affairs, health policies, and the area of justice and citizens' rights, which on the European level includes migration.

Agriculture, fisheries and food	Environment and energy
Business	EU Institutional affairs
Culture and education	Health
Customs and tax	Justice and citizens' rights
Development and humanitarian aid	Regions and local development
Economy and finance	Science and technology
Employment and social affairs	Transport and travel
Enlargement and foreign affairs	

Table 1 EU Policy Areas

Source: [http://europa.eu/pol/index\\_en.htm](http://europa.eu/pol/index_en.htm) (25.09.2015)

As mentioned above all policy fields may be affected by demographic developments or may affect demographic developments themselves in one way or another. This is, of course, also true at the European level. Therefore – before turning to the three policy fields this paper will focus on – we will briefly give some examples of demographic change as an issue in other EU policy fields.

Within the field of economy and finance, the EU's economic governance framework aims to detect, prevent and correct problematic economic trends such as excessive government deficits or public debt levels, which can stunt growth and put economies at risk.<sup>5</sup> Here the effects of demographic change are also considered. The responsible Directorate-General (DG) for Economic and Financial Affairs (DG ECFIN) provides long-run economic and budgetary projections directed at assessing the impact of an ageing population in so-called Ageing Reports, which have been published five times since 2001.<sup>6</sup> In these reports age-related expenditures covering pensions, health care, long-term care, education and unemployment benefits are projected and analysed. The projections contribute to a variety of policy debates at the EU level, including the overarching Europe 2020 strategy for smart, sustainable and inclusive growth (see section 4.1). They are specifically used in the context of the European Semester<sup>7</sup> to identify policy challenges,

in the annual assessment of the sustainability of public finances under the Stability and Growth Pact, in the Open Method of Coordination<sup>8</sup> of pensions, health care and social inclusion, and in the analysis of the impact of ageing populations on the labour market and potential economic growth.

The area of regions and local development is also relevant in demographic terms. EU regional policy is characterised as a strategic investment policy targeting all EU regions and cities in order to support job creation, competitiveness, economic growth, improved quality of life and sustainable development.<sup>9</sup> Regional policy is delivered through three main funds: the European Regional Development Fund (ERDF), the Cohesion Fund (CF) and the European Social Fund (ESF). The bulk of cohesion policy<sup>10</sup> funding is concentrated on less developed European countries and regions in order to help them catch up and reduce economic, social and territorial disparities that still exist in the EU. Here demographic challenges (e.g. ageing and depopulation) also play an important role (e.g. DG REGIO 2008, Hungarian Presidency of the Council of the EU 2011). The responsible body within the European Commission is the DG for Regional and Urban Policy (DG REGIO).

In the field of culture and education, the area of education and training is particularly relevant in demographic terms.<sup>11</sup> Each EU country is responsible for its own education and training systems. EU policy is designed to support national action and help address common challenges, such as ageing societies, skills deficits in the workforce, technological developments and global competition. In 2009 four common EU objectives to address challenges in education and training systems by 2020 have been defined – most of them also having a strong demographic dimension: (1) making lifelong learning and mobility a reality; (2) improving the quality and efficiency of education and training; (3) promoting equity, social cohesion, and active citizenship; (4) enhancing creativity and innovation, including entrepreneurship, at all levels of education and training. The DG for Education and Culture (DG EAC) is the responsible body within the European Commission.



The policy area of science and technology includes the field of research and innovation in which demographic aspects are considered as one of the big challenges of our times, e.g. in the EU initiative “Innovation Union”<sup>12</sup>, which uses public sector intervention to stimulate the private sector and to remove bottlenecks which prevent ideas from reaching the market. In terms of research funding the EU launched its latest 7-year programme “Horizon 2020” in January 2014, which provides almost €80bn of EU funding available up to 2020. Its goals are: (1) to strengthen the EU’s position in science; (2) to strengthen industrial innovation; and (3) to address major social concerns, which also explicitly include population ageing. The EU is also working to create a unified European Research Area, where researchers will be able to work anywhere in the EU and cooperation across borders will be supported and encouraged. The responsible body in the European Commission is the DG for Research and Innovation (DG RTD).

Also in policy areas like agriculture, fisheries and food, demographic change plays a role, e.g. in the field of the Common Agricultural Policy (CAP). Here some demographic developments are seen as a serious challenge, for instance depopulation tendencies in rural areas or an ageing farming population. Furthermore a balanced territorial development is one of the three long-term CAP objectives defined in the CAP Reform 2014-2020 (European Commission 2013e).<sup>13</sup> The responsible body within the European Commission is the DG for Agricultural and Rural Development (DG AGRI).

We will now turn to the three EU policy fields this paper focuses on, namely employment and social policies (2.1), health policies (2.2) and legal migration of third-country nationals (2.3). The following will provide short summaries of the main treaty foundations and objectives, and the competences of the EU in the specific policy fields.<sup>14</sup>

## 2.1 EMPLOYMENT AND SOCIAL POLICIES

The main objectives of EU employment and social policy are to increase employment rates and worker mobility, improve the quality of jobs and working conditions, inform and consult workers, combat poverty and social ex-

clusion, promote equal opportunities, combat discrimination and to modernise social protection systems. On the Commission’s official website, alleviating the effects of demographic ageing is explicitly mentioned as one of the main goals: “To counteract the impact of demographic ageing, EU employment and social policy is designed to: ease the transition from school to work; make it easier to find a job; modernise social security systems; make it easier for workers to move freely around the EU; alleviate poverty; protect people with disabilities.”<sup>15</sup>

It is important to note that the development and implementation of social policies are largely left to the discretion of the Member States, since social policies are assumed to be implemented more effectively at that level. The EU has no formal competences in social policies like family policy, social security systems or pensions. However, it does have the ability to legislate in the field of employment and social rights (e.g. gender equality), and on matters that affect the functioning of the internal market, for instance, the free movement of people, which has a significant influence on other social policies at the national level (e.g. Parental Leave Directive 2010/18/EU). Overall, however, EU employment and social policy is mainly about coordinating separate independent national systems rather than harmonising them.

The main policy instrument that the EU does have to influence national social policies is the Open Method of Coordination (OMC). The OMC is a framework for cooperation that enables the EU to steer the national policies of the Member States towards common objectives that are subsequently monitored by the EU without using formal sanctions. In addition the EU can promote further ‘soft law’ measures, such as codes of good practice. At the European Commission level the responsible body is the DG for Employment, Social Affairs and Inclusion (DG EMPL; see section 3.1).

## 2.2 HEALTH POLICIES

The Treaty on the Functioning of the EU (2007) specifies in article 168(1) that a “high level of human health protection shall be ensured in the definition and implementation of all Union policies and activities.” The main

objectives of EU health policies are to prevent diseases, promote healthier lifestyles, promote well-being, protect people from serious cross-border threats to health, improve access to health care, promote health information and education, improve patient safety, support dynamic health systems and new technologies, and set high quality and safety standards for organs and other substances of human origin, medicinal products and devices for medical use.

In the field of health policy the EU has supporting competences, which means the EU can only carry out actions to support, coordinate or supplement Member States' actions. The EU does not define health policies, nor the organisation and provision of health services and medical care. The primary responsibility for health protection and health care systems lies with the Member States. The responsible body in the European Commission is the DG for Health and Food Safety (DG SANTE; see section 3.2).

## 2.3 MIGRATION WITHIN THE FIELD OF JUSTICE AND CITIZENS' RIGHTS

The EU Treaty specifies the following objectives for the creation of an "Area of Freedom, Security and Justice" for EU citizens: ensure the free movement of persons, frame a common policy on asylum and immigration, offer a high level of protection to citizens, manage the EU's external borders, cooperate at the judicial level in civil and criminal matters, police cooperation, and fight against crime.

Two of these fields are especially relevant in demographic terms: free movement of EU citizens and immigration from third countries. In this paper we will focus on the field of legal migration from third countries. We will not include issues of asylum and irregular migration since these aspects are usually not discussed as means of dealing with demographic change in Europe.<sup>16</sup> We will also not include the issue of intra-EU mobility, which refers to the migration of EU citizens to other EU Member States. Intra-EU mobility, of course, may also have significant effects in demographic terms, but unfortunately we are not able to include this area because of reasons

of feasibility in regard to the scope of this paper.

The responsible body in the European Commission for legal migration is the DG for Migration and Home Affairs (DG HOME; see section 3.3). The overall objectives of EU immigration policy as laid out in the EU treaty are twofold: Firstly the development of a common immigration policy aimed at ensuring, at all stages, the efficient management of migration flows, fair treatment of third-country nationals residing legally in Member States, and the prevention of, and enhanced measures to combat, illegal immigration and trafficking of human beings. Secondly EU immigration policies should be governed by the principle of solidarity and fair sharing of responsibility, including its financial implications, between the Member States.

Regarding legal migration policies the EU can determine the conditions of entry and residence for third-country nationals entering and residing legally in one Member State for purposes of employment, study or family reunification. This ability, however, is shared with the Member States, who have the right to determine admission rates for people coming from third countries to seek work. On the level of migrant integration the EU may provide incentives and support for measures taken by Member States to promote the integration of legally residing, third-country nationals, but there is no provision for the harmonisation of national laws and regulations.

Before turning to the question of how demographic change is discussed as a political issue in the current political strategies of the EU (chapter 4) and how the debate has developed over time (chapter 5), we will give a short overview in the following chapter of the most relevant Directorates-General related to the policy areas of employment and social policy, health policy and migration policy, and show how population policies are embedded in their portfolio.

### 3. DEMOGRAPHIC CHANGE AS AN AREA OF POLITICAL ACTIVITY IN THE EUROPEAN COMMISSION

As shown in chapter 2, there are three DGs of the European Commission that are specifically addressing issues related to demographic change as understood in this paper: DG Employment, Social Affairs and Inclusion (DG EMPL), DG Health and Food Safety (DG SANTE), and DG Migration and Home Affairs (DG HOME). In the following each DG will be briefly introduced in the context of how it frames issues of demographic change in its political activities. Apart from these DGs, Eurostat – the statistical office of the European Commission – plays an important role in providing a solid foundation of reliable and objective statistics concerning demographic developments in the EU, which informs and facilitates debates by providing facts, analysis and projections. This is not only essential in policy debates, but also to inform the general public and gather wider support for policy reforms (e.g. raising pension ages).<sup>17</sup>

#### 3.1 DG EMPLOYMENT, SOCIAL AFFAIRS AND INCLUSION (DG EMPL)

The Commissioner responsible for DG EMPL in the current legislative period is Marianne Thyssen from Belgium. The mission letter she received from European Commission President Jean-Claude Juncker specified duties and goals to reach during her mandate as Commissioner for Employment, Social Affairs, Skills and Labour Mobility. Here demographic issues – next to the economic and financial crisis – play a central role: “Our population is ageing: longer life expectancy is a clear sign of progress but it has an impact on our workforce and we need to accommodate the costs that come with it. Inequalities have been on the rise and are calling into question the fairness and effectiveness of our social market economy. Our education and training systems are struggling to meet 21st century expectations, including longer working lives and digital skills. Labour market reforms have been implemented to a varying extent and there are still many obstacles to job creation and mobility in the workforce.”<sup>18</sup> Against this background Juncker defines the focus of the Commissioner’s work to be the modernisation of labour markets and social protection systems, promotion of the free movement of workers, develop-

ment of the skills level of the European workforce, and support of the work of the Commissioner for Migration and Home Affairs in developing a new European policy on legal migration to Europe to address skill shortages and to attract the talents that Europe needs. In addition Juncker specifies the overall aim as: “Ensuring that employment and social consideration, including the impact of ageing and skills needed are appropriately taken into account in all Commission proposals and activities”.<sup>19</sup>

On the DG EMPL website it states: “The European Union is facing unprecedented demographic changes (...). In light of these challenges it is important, both at the EU and the national level, to review and adapt existing policies.”<sup>20</sup> Referring to the 2006 Communication of the European Commission “The Demographic Future of Europe – From challenge to opportunity”, the following five key policy responses are highlighted (COM(2006) 571):

1. supporting demographic renewal through better conditions for families and improved reconciliation of work and family life;
2. promoting employment – more jobs and longer working lives of better quality;
3. increasing productivity and economic performance by investing in education and research;
4. receiving and integrating migrants into Europe;
5. ensuring sustainable public finances to guarantee adequate pensions, health care and long-term care.

Moving & working in Europe	Skills
Social Protection and Inclusion	Funding
Analysis, evaluation, impact assessment	Rights at work
European Employment Strategy	Agencies and partners

Table 2 Policies and Activities of DG EMPL.

Source: <http://ec.europa.eu/social/main.jsp?catId=1> (25.09.2015)

DG EMPL differentiates its policy portfolio into nine areas of “policies and activities” (see table 2). Demographic change and related aspects are most comprehensively dealt with in the area of “social protection and social inclusion”.<sup>21</sup> Here – apart from the economic crisis – demographic changes are described as “enormous”

challenges: “[T]he working-age population in Europe is shrinking, while the proportion of older people is growing. Solutions must be found to ensure sustainable and adequate social protection systems.”<sup>22</sup>

Under the headline of “Social Protection and Social Inclusion” in Table 2, DG EMPL specifies a number of activity areas of which two are especially important in demographic terms: (1) social investment and (2) social protection:

(1) Social investment is one of the core concepts DG EMPL is relying on to deal with the challenges of demographic change. The concept refers to social policies designed to strengthen people’s skills and capacities, and to support their full participation in employment and social life over the life course. In the foreword of DG EMPL’s brochure on “Investing in Social Europe”, former Commissioner László Andor wrote: “Challenges must be turned into opportunities. Europe’s workforce is ageing and shrinking and we are certain to see labour market shortages in the future. We can restore and maintain prosperity in Europe if we invest in our human capital, from cradle to old age. Building up people’s professional and social skills, and ensuring they have an opportunity to apply them in the labour market, is an investment we need to make. It is what social investment is about” (European Commission 2013a). As shown in Table 3, DG EMPL especially emphasises seven goals related to its social investment approach.<sup>23</sup>

(2) In terms of social protection the main policy framework is the Europe 2020 strategy (see section 4.1) and the Open Method of Coordination for social protection and social inclusion (Social OMC)<sup>24</sup>, which aims to promote social cohesion and equality through adequate, accessible and financially sustainable social protection systems and social inclusion policies. Through the Social OMC – and in collaboration with the Social Protection Committee<sup>25</sup> – the EU provides a framework for national strategy development, as well as for coordinating policies between EU countries on issues related to health care, long-term care and pensions.

Active inclusion	enabling every citizen (esp. the most disadvantaged) to fully participate in society
Social innovation	developing new ideas, services and models to better address social issues with input from public and private actors (incl. civil society) to improve social services
Investing in children	a preventive and integrated approach to break the cycle of disadvantage in early years by helping children live up to their full potential
Homelessness	long-term, housing-led, integrated homelessness strategies and introduction of efficient policies to prevent evictions
Poverty and social exclusion	to bring at least 20 million people out of poverty and social exclusion by 2020
Active ageing	helping people to stay in charge of their own lives for as long as possible as they age and, where possible, to contribute to the economy and society
Social services of general interest	clarifying the situation in regard to Community rules and social services and supporting the quality of social services

Table 3 DG EMPL’s aims on the level of social investment

Source: <http://ec.europa.eu/social/main.jsp?catId=1044&langID=en> (25.09.2015)

DG EMPL is also active in demographic analysis: Since 2007 DG EMPL, together with Eurostat, provides regular European Demography Reports<sup>26</sup>, which lay out the main facts and figures concerning demographic change and discuss appropriate policy responses.<sup>27</sup> Between 2006 and 2013 a European Demography Forum was held every two years to give European policy makers, stakeholders and experts the opportunity to share their knowledge and to discuss how to best address demographic change in regard to different aspects. Furthermore DG EMPL provides a knowledge bank as an information repository of facts and data on social protection and social inclusion for policy development and cooperation between Member States in the areas of social investment, demography and expert networks on social inclusion.<sup>28</sup> In addition DG EMPL runs the European Platform for Investing in Children (EPIC), which is an open platform where stakeholders and interested users can submit innovative and effective practices in the area of child and family policy.<sup>29</sup>

DG EMPL also participates in the so-called European Semester.<sup>30</sup> This is part of the joint economic governance wherein the Commission proposes recommendations to Member States for the European Council to adopt within the EU growth and stability pact. Some of the recommendations are about demographic change and relate to child education, reconciliation of work and private

life, integration of migrants and, most commonly, social services for older people, particularly pension systems. Under this recurring yearly process, Member State progress towards meeting the recommendations is assessed with a view to adapting the focus of national reforms.

In a nutshell DG EMPL focuses on a broad array of aspects of demography and ageing, aiming for instance at fostering longer working lives, developing occupational and private pensions to supplement state pensions, increasing the reconciliation of work and family life, promoting gender equality and more. It does this foremost within the Open Method of Coordination mentioned above and principally by disseminating good practices across Member States. Overall, DG EMPL is the body within the European Commission that is concerned with demographic change most extensively, which can be seen by its comprehensive view on demographic challenges and on the question of how to best mitigate the consequences of ageing. DG SANTE and DG HOME – in correspondence with their responsibilities – are dealing primarily with those aspects of demographic change that are related to health (DG SANTE) and migration (DG HOME), which will be discussed in the following two sections.

### 3.2 DG HEALTH AND FOOD SAFETY (DG SANTE)

Since 2014 Vytenis Andriukaitis from Lithuania has been the Commissioner for Health and Food Safety. In its self-description DG SANTE emphasises that – as well as being a value in itself – health is a precondition for economic prosperity and efficient spending on health can promote growth. Therefore Europe should invest wisely in health by spending smarter, but not necessarily more, in sustainable health systems, investing in people's health and investing in health coverage as a way of reducing inequalities and tackling social exclusion.<sup>31</sup>

The EU's overall health strategy is laid out in the White Paper "Together for Health" (COM(2007) 630) and has three main objectives, which also all have a strong demographic dimension: (1) fostering good health in an ageing Europe, (2) protecting citizens from health threats and (3) supporting dynamic health systems

and new technologies. In regard to ageing DG SANTE emphasises: "Ageing is one of the greatest social and economic challenges of the 21st century for European societies. It will affect all EU countries and most policy areas. By 2025 more than 20% of Europeans will be 65 or over, with a particularly rapid increase in numbers of over-80s. Because older people have different health care requirements, health systems will need to adapt so they can provide adequate care and remain financially sustainable."<sup>32</sup> DG SANTE focuses on ageing primarily within the area of "health in society" where three activities are specifically highlighted that concern ageing:

- the European Innovation Partnership on Active and Healthy Ageing, which attempts to increase average healthy life years in the EU by two years by 2020;<sup>33</sup>
- promoting healthy and dignified ageing by helping EU countries make their health systems more efficient;
- addressing Alzheimer's disease and other types of dementia.

Since health is determined to a large extent by factors outside the health area, DG SANTE stresses that an effective health policy must involve all relevant policy areas, in particular social and regional policy, taxation, environment, education and research.<sup>34</sup> One example of these cross-cutting issues are the increasing concerns about inequalities in life expectancies due to different socio-economic backgrounds, which do not only concern health policy, but also economic and social policy as well as education policy.

### 3.3 DG MIGRATION AND HOME AFFAIRS (DG HOME)

Dimitris Avramopoulos from Greece has been the Commissioner for Migration, Home Affairs and Citizenship since 2014. The European Commission President Juncker wrote in his mission letter: "Migration is one of the pressing challenges I have highlighted in my Political Guidelines. Europe needs to manage migration better, in all its aspects. A successful migration policy is both a humanitarian and an economic imperative. We need to show that the EU can offer both a compelling case to attract global talent, and a vision of how to robustly address the

challenge of irregular migration. We need a new policy on migration that will address skill shortages and the demographic challenges the EU faces and that will modernise the way the EU addresses these challenges.” That migration has been placed high on the political agenda of the new Commission President is also evident based on the change of the DG from the DG for Home Affairs to the DG for Migration and Home Affairs.

DG HOME describes its main areas of activities as: building a common EU migration and asylum policy; ensuring EU security, dialogue and cooperation with non-EU countries; funding of the EU home affairs policy; and a “Europe for Citizens”. In this paper we only focus on the issue of legal migration of non-EU citizens. DG HOME states in this regard: “Greater mobility brings with it opportunities and challenges. A balanced, comprehensive and common migration policy will help the EU to seize these opportunities while tackling the challenges head-on. This policy – currently under development – is built upon solidarity and responsibility. It will have the added advantage of making a valuable contribution to the EU’s economic development and performance in the long term.”<sup>35</sup> So far legal migration is dealt with under five categories:

- **Work:** Labour immigration is seen as having a key role to play in driving economic development in the long term and in addressing current and future demographic challenges in the EU. The goal is to produce flexible admission systems responsive to the priorities of each EU State, while enabling migrant workers to make full use of their skills. Measures cover the conditions of entry and residence for certain categories of immigrants such as highly qualified workers (e.g. Blue Card Directive), seasonal workers and intra-corporate transferees, as well as the establishment of a single work and residence permit.
- **Family reunification:** DG HOME stresses that for the past 20 years, family reunification has been one of the main reasons for immigration to the EU. Reunification is seen as creating socio-cultural stability and facilitating the integration of non-EU nationals, and thereby the promotion of economic and social cohesion.
- **Study, research and training:** One of the objectives of EU action in education is to promote Europe as a world centre of excellence for studies and vocational training: “Bringing more non-EU nationals into the EU for studies

is a key factor in that strategy. Migration in this case clearly constitutes a form of mutual enrichment: for the migrants concerned, their country of origin and the host EU State, and helps to promote familiarity with other cultures.”<sup>36</sup>

- **Integration** of migrants is seen as the key to maximizing the opportunities of legal migration and to making the most of the contributions that immigrants can make to the economic, social and cultural development of European societies.

- **Long-term residents:** The integration of non-EU nationals who are long-term residents in EU States is understood as crucial to promoting economic and social cohesion. DG HOME emphasises that non-EU nationals who have legally resided in an EU State for a certain period of time should be granted a set of uniform rights, almost identical to those enjoyed by EU citizens.

On the European Website on Integration (<https://ec.europa.eu/migrant-integration>), DG HOME provides a portal for an exchange of information, documentation and online data collection, as well as for community-building activities between integration stakeholders in Europe. The aim of the European Website on Integration is to help improve the effectiveness of integration policies and practices in the EU by sharing successful strategies and supporting cooperation between practitioners. It is intended as a tool for people working in the field of integration, both in non-governmental and governmental organisations.

The policy development in the different Directorates-General takes place within the framework of the overall political strategies and guidelines of the European Commission. Which role demographic change plays at this level will be the subject of chapter 4.

## 4. DEMOGRAPHIC CHANGE IN CURRENT POLITICAL STRATEGIES AND GUIDELINES

Before turning to the question of how demographic change developed over time as an issue on the political agenda of the EU (chapter 5), we will briefly show which role demographic change played in the current overall political strategy of the European Commission. Therefore we will first have a look at the “Europe 2020” strategy (4.1) and then at the guidelines, which current Commission President Juncker has developed for his Presidency (4.2).

### 4.1 EUROPE 2020

Europe 2020<sup>37</sup> is the EU’s ten-year strategy for growth and jobs following the Lisbon strategy<sup>38</sup>. It was launched as a partnership between the EU and its Member States in 2010 to create the conditions for smart, sustainable and inclusive growth.

Ageing of the population is named as one of the three big, long-term challenges Europe is facing: “The crisis has wiped out years of economic and social progress and exposed structural weaknesses in Europe’s economy. In the meantime, the world is moving fast and long-term challenges – globalisation, pressure on resources, ageing – intensify. The EU must now take charge of its future” (COM(2010) 2020: 5). The European Commission stresses that ageing is a more pressing issue in Europe than in other parts of the world, which is especially problematic in combination with Europe’s employment rate also being comparably lower than, for example, in the U.S. or Japan because of the lower participation rates of woman and older workers: “The combination of a smaller working population and a higher share of retired people will place additional strains on our welfare systems” (COM(2010) 2020: 7).

The Commission laid out five headline targets for the EU to achieve by the end of 2020 with three of them directly or indirectly referring to demographic aspects:

- 75% of the population aged 20-64 should be employed;
- the share of early school leavers should be under 10% and at least 40% of those aged 30-34 should have a tertiary degree;

- 20 million less people should be at risk of poverty than in 2008.

To catalyse progress at the EU level, the Commission created seven flagship initiatives, which include specific work programmes in areas identified as important levers for smart, sustainable and inclusive growth. Four of them include a strong demographic dimension:

- “Innovation Union” aims to re-focus research and development, and innovation policy on the challenges facing society including ageing and demographic change.
- “Youth on the move” is a package of policy initiatives focused on education and employment for young people in Europe to reduce youth unemployment and increase the youth employment rate.
- “An agenda for new skills and jobs” sets out to promote gender equality, lifelong learning, access to childcare facilities and care for other dependents, flexicurity principles<sup>39</sup>, intra-EU labour mobility, a forward-looking and comprehensive labour migration policy, the reconciliation of work and family life, new forms of work-life balances and active ageing policies.
- “European platform against poverty” has a focus on combating poverty and social exclusion, reducing health inequalities, promoting healthy and active ageing, supporting especially the most vulnerable groups (e.g. one-parent families, elderly women, minorities) and improving access to work, social security, education and essential services such as health care.

While Europe 2020 represents the Commission’s long-term strategy until the year 2020, the Presidents of the European Commission develop political guidelines for their terms in office within this overall framework. In the following we will present the political guidelines of the current European Commission under the presidency of Jean-Claude Juncker (2014-2019).

### 4.2 POLITICAL GUIDELINES OF THE JUNCKER COMMISSION

In his political guidelines “A New Start for Europe: My Agenda for Jobs, Growth, Fairness and Demographic Change”, current European Commission President

Juncker stated that after spending several years focusing on crisis management due to the financial and economic crisis, “Europe is finding it is often ill-prepared for the global challenges ahead, be it with regard to the digital age, the race for innovation and skills, the scarcity of natural resources, the safety of our food, the cost of energy, the impact of climate change, the ageing of our population or the pain and poverty at Europe’s external borders” (Juncker 2014:2).<sup>40</sup>

Juncker claims that the time has come for a new approach that focuses on ten policy areas, one of which is formulated explicitly against the backdrop of demographic ageing, namely migration.<sup>41</sup> He points out that for the first time, managing migration better is an explicit priority for the European Commission.<sup>42</sup> On the one hand he stressed that it is a humanitarian imperative to protect those in need and to ensure that situations such as the one in Lampedusa never arise again. On the other hand he argues that Europe needs a new European policy on legal migration which “could help us to address shortages of specific skills and attract talent to better cope with the demographic challenges of the European Union. I want Europe to become at least as attractive as the favourite migration destinations such as Australia, Canada and the USA” (Juncker 2014: 9f.). Against this background he specifies five main objectives, which are mostly related to asylum and irregular migration.<sup>43</sup> Looking at legal migration – which this paper focuses on – he aims at promoting the legal migration of persons with skills needed in Europe through a review of the ‘Blue Card’ legislation.<sup>44</sup>

This increased importance that Juncker is ascribing to migration is also reflected in the creation of a European Commissioner for Migration, Home Affairs and Citizenship in 2014 accompanied by a restructuring of the European Commission to “prioritise a new policy on migration that will robustly tackle irregular migration, whilst at the same time making Europe an attractive destination for top talents.”<sup>45</sup>

This short review of the current political strategies and guidelines of the European Commission shows that demographic change is an important issue on the political agenda of the EU today. The specific aspects of demo-

graphic change that are the focus of interest, however, change in accordance with the important political, economic and social developments at the time, like the economic crisis which led to a focus on boosting growth and employment in the Europe 2020 strategy and most recently the refugee crisis in Europe, which placed migration policy high on the political agenda of the current Juncker Commission.



## 5. THE DEVELOPMENT OF DEMOGRAPHIC CHANGE AS A POLITICAL ISSUE OVER TIME

In order to get an impression of how demographic change developed over time as an issue on the political agenda of the EU, we will look at issue-related White Papers<sup>46</sup>, topics of European Years and other important Communications and Reports of the European Commission since the early 1990s. The focus is not on concrete policy measures adopted, but on which aspects are seen to be important and which policy actions are considered in this regard as relevant. The following overview is organised along the three topics this paper focuses on (see chapter 1): “ageing and health”, “family and fertility” and “legal migration”.

### 5.1 AGEING AND HEALTH

Ageing becomes a prominently visible issue on the EU’s political agenda in the early 1990s. In 1991 the European Commission established an “observatory” to study the impact of national policies on ageing and older people (Walker and Maltby 2012). Two years later in 1993, the “European Year of Older People and Solidarity between Generations” represented the first proclamation of the issue at this level<sup>47</sup>: “After 10 years of progress on issues of aging, the Community agreed in 1990 on the first EC program for older people. This three-year effort, culminating in the European Year, marked an official recognition by the Council of Ministers of the relevance of older people’s issues to the European policy agenda” (Chapman 1993: 6). The objectives of the “European Year of Older People and Solidarity between Generations” were defined to (Commission of the European Communities 1995):

- highlight the Community’s social dimension;
- raise general awareness of the situation of older people;
- promote a debate about changes needed to meet the challenge of ageing;
- promote intergenerational solidarity;
- involve older people in the process of Community integration.

Also in 1993 the White Paper “Growth, Competitiveness, Employment – The challenges and ways forward into the 21st century” – which is devoted to the issue of

unemployment – briefly mentions ageing of the population as one of two major challenges in demographic terms, next to the transformation of family structures. In this White Paper the Commission mainly calls for more active solidarity between the generations “with an eye to the repercussions of a demographic trend which will see falling numbers of persons of adult working age. It is absolutely essential that all decisions taken today take account of this demographic dimension” (COM(93) 700: 15).

One year later in the White Paper “European Social Policy – A way forward for the Union” (COM(94) 333), the European Commission stresses that the challenge of ageing is bigger than traditional issues of pensions and care services, but a high level of integration of the older population needs to be maintained: “Achieving this will require new thinking on many issues that have been granted until now, such as traditional career patterns, retirement age and the role of nuclear and extended family. Account also needs to be taken of the fact that women are in a majority among older people, and that women of this age usually have much lower incomes” (COM(94) 333: 39). Concrete aspects mentioned in this regard are the need to adapt social protection schemes, long-term care insurance for people who become dependent and the encouragement of active and creative contribution by older people to society.

Article 7 of the Protocol on social policy to the Treaty of Maastricht (1992) states: “The Commission shall draw up a report each year on progress in achieving the objective of Article 1, including the demographic situation in the Community.”<sup>48</sup> Following this the first demography report was published by the European Commission in 1994 (COM(94) 595). The report is organised along four aspects considered to be the most relevant in contemporary European demography at that time:

1. the main trends in European demography in the world and related issues;
2. the development of age structures in the EU and its consequences in terms of the situation of the elderly, labour organisation and the financing of retirement;
3. the growing differences in households and family

life that are parallel to population ageing (see section 5.2);

4. migration and the questions of whether it could help to modify demographic evolution, particularly the ageing process (see section 5.3).

Considering the social and economic impact of ageing, the Commission states: "These considerations bear out the idea that the ageing of populations is not simply a demographic matter but, more than a simple modification of age structures, has become an overall problem of society. It has more, further reaching and more subtle implications than has long been supposed. Over and above the very real questions raised by this development in the area of family policy, of financial balance between the generations and of differential systems for financing pensions, it needs to be tackled from a forward-looking and dynamic point of view" (COM(94) 595: 31). The Commission sees two immediate and considerable challenges: (1) how to maintain economic performance with a smaller and older labour force and (2) how to ensure the same level of social protection for increasing numbers of social security claimants with greater chances of survival. In the course of the analysis a number of key points for further consideration are raised, e.g.:

- the effects of ageing on today's economic and social organisation;
- the potential of investment in human capital to finance tomorrow's pensioners;
- to overcome practices which artificially accentuate ageing (e.g. age limits on jobs, linear career models, fixed retirement).

The second demography report in 1995 focuses on the extent and acceleration of the ageing process (European Commission 1995b): "The recent demographic change means that Member States will experience ageing in different ways and to different degrees, but in all of them there will be numerous effects in fields such as the economy (in its widest sense), social protection, solidarity between generations, and the dialogue between the social partners." The demographic future is described by four major trends – fall in population, decline in the number of children and young people, shrinking workforce and an explosion in the number of people approaching re-

tirement age – which are expected to have "time bomb" effects in many fields, particularly in respect to (European Commission 1995b: 21):

- **Economy:** The labour market will have to adapt to a different kind of demand, principally in the fields of education, housing, health, transportation and leisure. "This will have to be done precisely at a time when those producing the resources needed by the economy are steadily decreasing in numbers and when the future generations (who will have to be highly educated and trained if growth is to be achieved) will also be fewer and fewer in number" (European Commission 1995b: 21).

- **Social protection and solidarity between the generations:** "All aspects of social and family life will be thus dominated by the needs of older people. What concessions will the elderly be prepared to make to the younger generations, and how will the latter finance pensions? There can be no doubt that the principle of solidarity between generations will emerge as a key factor in the adjustments which will have to be made" (European Commission 1995b: 21).

- **Dialogue between the social partners:** Collective agreements will have to consider new redistribution models in a time when the reorganisation of work (structure, working hours) may constitute a necessary response to demographic change.

In 1995 the White Paper "Teaching and Learning – Towards the learning society" set another approach to deal with an ageing society prominently on the agenda, namely lifelong learning (European Commission 1995a: 5): "Demographic trends have increased life expectancy radically changing at the same time the age structure of the population, thereby increasing the need for lifelong learning." The main purpose of the White Paper is to plot out the route to a learning society by identifying the options available to the EU in education and training – also against the background of education and training as a means for tackling the employment problem of the time. The White Paper also launched the "European Year of Lifelong Learning" in 1996, which focused on themes like high-quality general education, vocational training and motivation to acquire education and training.<sup>49</sup>

As a contribution to the United Nations (UN) "Inter-

national Year of Older Persons” in 1999, the European Commission published the communication “Towards a Europe for All Ages – Promoting prosperity and inter-generational solidarity” (COM(1999) 221). In this Communication the Commission lays out its view on policy changes required to deal with demographic ageing regarding employment, pensions, health, care and social cohesion:

- On the level of employment the focus is on the low employment level of older workers. Measures proposed are: supporting workers’ capacities, lifelong learning, flexible working arrangements, incentives to take up job offers and training opportunities, adaptation of the workplace for ageing employees, promotion of job mobility, use of modern technology and ergonomics, and promotion of equal opportunities between women and men.

- In regard to pensions the Commission stresses the need to reverse the trend towards early retirement, to explore new forms of gradual retirement and to make pension schemes more sustainable and flexible.

- To deal with the growing need for old-age care and health care, it is proposed to promote accident prevention, post-illness rehabilitation and healthy ageing. Ageing-relevant health promotion should also be directed at the young and the middle-aged. Access to health treatment needs to be improved for all ages and all older persons, and an adequate supply of quality care for the very old and for frail persons should be provided.

- Finally the Commission is concerned about the growing diversity among older people in terms of resources and needs. In order to better reflect these diversities, policies are supposed to better mobilise the resources at the disposal of large segments of the older population and to more effectively combat the risk of social exclusion late in life, especially in regard to women.

In 2001 the first Ageing Report was released in which age-related expenditures covering pensions, health care, long-term care, education and unemployment transfers are projected and analysed. Ageing Reports are published regularly by the DG for Economic and Financial Affairs (DG ECFIN) and the Ageing Working Group of the Economic Policy Committee (EPC). They are supposed to provide long-term projections that give an indication of the timing and scale of challenges that

would result from an ageing population.<sup>50</sup>

In early 2002 the Commission responded to a call by the Stockholm European Council “to report jointly (...) on how to increase labour force participation and promote active ageing” with a report focusing on labour force participation in the context of demographic developments (COM(2002) 9). Here, the Commission stresses that demographic ageing requires policy measures that address all age groups of the working population. The report identifies a number of key factors which influence labour market participation: availability and attractiveness of jobs, balance of financial incentives, education and training, a supportive environment, public employment services, childcare and elder care, and mobility support. On this basis the Commission defines three overall policy aims: (1) to ensure that present and future working generations will remain active as they grow older, (2) to attract a substantial part of those currently inactive but able to work, particularly women, to the labour market on a lasting basis, and (3) to maintain the participation of today’s older workers. Overall the Commission follows a life cycle approach aiming at maximizing each individual’s capacity to participate over his or her whole life cycle.<sup>51</sup>

Also in 2002 the European Commission contributed to the 2nd World Assembly on Ageing organised by the UN with the communication “Europe’s Response to World Ageing – Promoting economic and social progress in an ageing world” (COM(2002) 143). Here the Commission summarises four key challenges: (1) managing the economic implication of ageing in order to maintain growth and sound public finances, (2) adjusting well to an ageing and shrinking workforce, (3) ensuring adequate, sustainable and adaptable pensions, and (4) achieving access to high quality health care for all while ensuring the financial viability of health care systems. The Commission summarises its policy approach as the following: “Adjusting well to population ageing is an issue for people of all ages and a life course approach can help the development of adequate policy responses taking account of the related age and gender specific issues. This results in an orientation towards active ageing policies and practices. Core active ageing practices include lifelong learning, working longer, retiring later

and more gradually, being active after retirement and engaging in capacity enhancing and health sustaining activities. Such practices aim to raise the average quality of individual lives and at the same time, at societal level, contribute to larger growth, lower dependency burdens and substantial cost savings in pensions and health” (COM(2002) 143: 5f.).

Two years later the Commission again warns that “the low employment of older workers in Europe represents a waste of individual life opportunities and societal potential” in its communication “Increasing the Employment of Older Workers and Delaying the Exit from the Labour Market” (COM(2004) 146: 3). The Commission asks the Member States and social partners for “drastic action” to address the key factors for sustaining the employment of older workers: financial incentives to discourage early retirement, making sure that work pays, access to training and lifelong learning strategies and effective labour market policies, good working conditions conducive to job retention, flexible working arrangements and care services, and real prospects for employment.

In 2005 the Commission published the Green Paper<sup>52</sup> “Confronting Demographic Change – A new solidarity between generations” (COM(2005) 94).<sup>53</sup> The focus is on getting people jobs, innovation, increasing productivity and on the possible contribution of immigration (see section 5.3). It is stressed that it is also necessary to continue modernising social protection systems, to ensure their social and economic sustainability and to enable them to cope with the effects of demographic ageing. In regard to all of these aspects a number of questions are formulated for public consultation. An aspect that was prominently discussed in this Green Paper for the first time as a challenge that should also be dealt with directly are the low birth rates themselves (see section 5.2). As a conclusion the European Commission defined three essential priorities that Europe should pursue in order to face demographic change: (1) return to demographic growth, (2) ensure a balance between the generations, and (3) find new bridges between the stages of life.

One year later the Commission comprehensively presented its views on the demographic challenge and on the best ways for tackling it in its communication “The

Demographic Future of Europe – From challenge to opportunity” (COM(2006) 571). This Communication presents a kind of “demography strategy”, which provides the framework for the Commission’s approach to demographic change until today. The Commission defines five key areas for constructive policy responses to take full advantage of the opportunities offered by longer lives while also generating demographic renewal:

1. Promoting demographic renewal by creating conditions supportive of those who wish to have children: more equal opportunities for citizens with and without children, universal access to assistance services for parents (esp. childcare), better work-life balance through flexible forms of work, effective gender equality policies, and parental leave.

2. Promoting employment with more jobs and longer working lives: e.g. improvement of education systems, “flexicurity”, combating discriminatory prejudices against older workers, promoting a genuine European public health policy, reducing differences in life expectancy, increasing the number of women and people over the age of 55 in work.

3. More productive and dynamic Europe by giving different economic operators the chance to take full advantage of the opportunities presented by demographic change (new markets for goods and services responding to the needs of an older clientele) and by encouraging economic actors to incorporate the ageing phenomenon into their innovation strategies.

4. Receiving and integrating immigrants through the development of a common policy on legal immigration, attracting a qualified labour force from outside in order to meet the needs of the labour market, promoting diversity and combating prejudice in order to facilitate the economic and social integration.

5. Sustainable public finances by increasing the employment participation rate, avoiding early withdrawal from the labour market, raising the age of definitive retirement, guaranteeing adequate social protection and equity between the generations, allowing an increase in retirement income with supplementary pensions, ensuring better balance between contributions and benefits, creating stable and secure conditions for individuals to save and invest.

The Commission concludes: "The source of the problem is not higher life expectancy as such, rather it is the inability of current policies to adapt to the new demographic order and the reluctance of businesses and citizens to change their expectations and attitudes, particularly in the context of labour market modernisation. In short the Member States are facing a problem of retirement rather than a problem of ageing" (COM(2006) 571: 13).

The demography report published in 2007 (SEC(2007) 638) summarises the analytical work carried out prior to the adoption of the Communication on Europe's demographic future one year before (COM(2006) 571) and provides facts and figures to illustrate the potential of each of the five key policy areas the Commission points out in order to achieve constructive responses to the demographic challenge. The main focus of the demography report is on mitigating the challenges of ageing through increasing the overall size of the workforce.

Also in 2007 the European Commission launched its communication "Ageing Well in the Information Society" (COM(2007) 332). The Commission stresses that the ageing of Europe's population also provides economic and social opportunities. The action plan seeks to promote and coordinate the development of ICTs (Information and Communication Technology) associated with services for older people in the EU: (1) to enable them to prolong their working life (while maintaining a work-life balance); (2) to stay socially active and creative (through networking and access to public and commercial services); and (3) to age well at home (through ICTs providing a higher quality of life and degree of independence). The objectives of the Commission's action plan are also aimed at businesses by emphasising the increased market size and market opportunities, the better skilled and productive work force and a stronger position in the growing markets worldwide. Possible benefits for public authorities are also addressed, like cost reductions, increased efficiency and better overall quality of health and social care systems.

A further aspect that came into special focus in 2007 related to ageing is health. In its White Paper "Together for Health – A strategic approach for the EU 2008-2013" (COM(2007) 630), the European Commission set out a

new Community health strategy. Population ageing is among the main issues discussed: "[D]emographic changes including population ageing are changing disease patterns and putting pressure on the sustainability of EU health systems. For the Commission, supporting healthy ageing means promoting health throughout the lifespan, aiming to prevent health problems and disabilities from an early age, and tackling inequities in health linked to social, economic and environmental factors" (COM(2007) 630: 2).

In 2008 the Commission again identifies population ageing, alongside with technological progress and globalisation, as one of the key drivers of societal change in its communication "Renewed Social Agenda" (COM(2008) 412: 4)<sup>54</sup>:

"The renewed social agenda set out in this Communication is built around opportunities, access and solidarity. Generating opportunities requires a continued effort to creating more and better jobs and increasing welfare. It means dismantling barriers, facilitating mobility, fighting discrimination, fostering gender equality, supporting families and tackling new forms of social exclusion. To exploit opportunities, individuals need access – to education, health care, social services of general interest. They should be able to actively participate and integrate in the societies in which they live. Those individuals and regions that cannot cope and are left behind by the rapid pace of change need support. Therefore, the renewed social agenda is also one of solidarity – stepping up efforts to fight poverty and social exclusion and explore new ways to help individuals adjust to globalisation and technological change."

Against this background the Commission presents concrete measures in seven priority areas: (1) children and youth, (2) investing in people, more and better jobs, new skills, (3) mobility, (4) longer and healthier lives, (5) combating poverty and social exclusion, (6) fighting discrimination, and (7) opportunities, access and solidarity on the global scene. In addition the Commission is convinced that Europe's ageing society demands a variety of further policy responses: From supporting research into how information technology can improve the health and well-being of older people, to assessing what health

care and pension reforms are needed to meet the needs of an ageing population while ensuring the sustainability of public financing.

Following this communication the Demography Report 2008 placed the analysis under the theme of “Meeting Social Needs in an Ageing Society” (SEC(2008) 2911). The report focuses on two issues in particular: the modernisation of family policies (see section 5.2) and opportunities for enhancing the contribution of older people to the economy and society. In regard to the latter, the Commission calls on policy makers to develop adequate policy responses which provide: opportunities to stay active in the labour market and in society, access to goods and services that preserve older people’s autonomy, and solidarity with the dependent and protection of their dignity. Moreover the Commission warns that an increase in employment might not be enough to tackle the challenges of ageing: “While there is still good potential for increasing employment through increased labour force participation, notably of women and older workers, it can be expected that within about one decade, the decline of the working-age population will be such (...) that rising employment rates will no longer be sufficient to compensate for this decline. From then on the source of economic growth will have to be increases in productivity, which need to be achieved through investment in human and physical capital and in innovation” (SEC(2008) 2911).

The next demography report in 2010 “Older, More Numerous and Diverse Europeans” (European Commission 2011: 6) concludes that Europe’s future depends to a great extent on its capacity to tap the strong potential of the two fastest growing segments in its population: older people and immigrants (see section 5.3). Subsequently the Commission identifies three crucial policy areas to boost economic growth and achieve greater social cohesion: (1) promotion of active ageing to allow older people to contribute to society, (2) integration of migrants and their descendants, and (3) reconciliation of paid work and family commitments. Again the need for an increase in productivity is also emphasised: “At the same time, Europe needs to find ways of maintaining greater productivity while preparing for increasing levels of ageing-related expenditures, despite the demise

of public finances as a result of the recession” (European Commission 2011: 6).

The year 2012 was declared the “Year of Active Ageing” by the European Commission.<sup>55</sup> In this initiative many aspects were picked up and promoted that had been discussed on the European agenda in the years prior, especially regarding the level of older people’s employment, participation and independent living: “Promoting active ageing means creating better opportunities so that older women and men can play their part in the labour market, combating poverty, particularly that of women, and social exclusion, fostering volunteering and active participation in family life and society and encouraging healthy ageing in dignity. This involves, inter alia, adapting working conditions, combating negative age stereotypes and age discrimination, improving health and safety at work, adapting lifelong learning systems to the needs of an ageing workforce and ensuring that social protection systems are adequate and provide the right incentives” (Decision No 940/2011/EU).

Furthermore in 2012 the EU published the White Paper “An Agenda for Adequate, Safe and Sustainable Pensions” (COM(2012) 55) with the first sentences stating: “An ageing population presents a major challenge to pension systems in all Member States. Unless women and men, as they live longer, also stay longer in employment and save more for their retirement, the adequacy of pensions cannot be guaranteed as the required increase in expenditure would be unsustainable” (COM(2012) 55: 2). The White Paper proposes, in particular, to:

- create better opportunities for older workers to stay in the labour market by adapting work place and labour market practices, bring older workers into work, promote lifelong learning, support healthy ageing, combat gender and age discrimination and try to reconcile work, private and family life;
- develop complementary private retirement schemes;
- enhance the safety of supplementary pension schemes and make supplementary pensions compatible with mobility;
- promote longer working lives by linking retirement age with life expectancy, restrict access to early retirement and close the pension gap between men and women;

- continue to monitor the adequacy, sustainability and safety of pensions and support pension reforms in the Member States.

While most of these aspects are related to mitigating the effects of demographic change, one aspect was explicitly linked to reverse demographic change itself: “Addressing gender inequalities by facilitating the reconciliation of work and private life can also have long-term indirect benefits for pension systems by making it easier for people to raise a family, thus raising birth rates and mitigating the long-term decline in the working-age population” (COM(2012) 55: 12).

In 2013 a short demography report was published as a special supplement to the Quarterly Review “EU Employment and Social Situation” (European Commission 2013c). It provided an overview of recent demographic trends in the EU without reaching further conclusions or political recommendations. The latest demography report was published in 2015 and concluded after a comprehensive overview of recent demographic trends: “Under these circumstances: (1) In the short term: EU’s human resource potential should be fully tapped into in order to bring so-far inactive parts of WAP (those neither in employment nor in unemployment) back to the labour market. Under the assumptions made here, tapping into so-far inactive labour resources could prolong the EU’s potential of ‘unlimited’ employment growth by one decade. (2) In the medium term: this open window of opportunity should be used to implement policies designed to speed productivity growth. Productivity gains are expected to become the only remaining source of economic growth in the long run” (European Commission 2015: 52). To close the EU’s productivity gap vis-à-vis the U.S., the Commission recommends to invest in human resources through training and education, which are also expected “to help to create the jobs necessary to ensure high levels of growth in times of demographic change” (European Commission 2015: 52).

This overview has shown that the issue of ageing and health has been firmly established on the political agenda of the European Commission. The issue started to gain high political visibility at the beginning of the 1990s with a clear focus on the situation of older people, their

integration in society and intergenerational solidarity. Shortly thereafter, the question of how to maintain economic performance with a smaller and older labour force also came into focus, as well as the question of how to ensure adequate levels of social protection for an ageing population. The main strategies discussed to deal with these challenges were directed at increasing the overall size of the workforce, promoting active ageing, and ensuring sustainable and adaptable pensions. In the last several years it was increasingly emphasised that this alone may not be sufficient in the long run to compensate for the decline in the working-age population, but that there is also the strong need to increase productivity through investment in human and physical capital and innovation. These different strands of the discussion about how to deal best with demographic ageing – and the numerous related aspects – accumulated in the formulation of the demography strategy of the European Commission in 1996. Here the five areas have been defined which until today represent the main dimensions of demographic change as a political issue on the agenda of the European Commission: (1) promoting demographic renewal, (2) promoting employment, (3) more productive and dynamic Europe, (4) receiving and integrating immigrants and (5) sustainable public finances. Within these areas a broad range of possible policy measures to reach these declared goals are discussed today, which have been developed in the discussion over the last 25 years.

While this section took a broader view on how the issue of demographic change in terms of “ageing and health” has developed over time, the next two sections will look more closely at how the specific fields of “family and fertility” (5.2) and “legal migration” (5.3) have been discussed as means of dealing with the consequences of demographic ageing over time.

## 5.2 FERTILITY AND FAMILY

Regarding “fertility and family”, one can distinguish at least three dimensions in which these issues are discussed in regard to demographic change by the European Commission:

1. The transformation of family structures as a demo-

graphic challenge: Which changes in family formations and related aspects are perceived as challenging the demographic set-up of European populations?

2. Family policies to deal with the consequences of demographic change: Which family-related policies are discussed to adapt to the effects of population change?

3. Family policies to influence the dynamic of demographic change: Which family policies are considered to directly influence the sources of demographic change?

In the following we will shed light on these three dimensions in more detail on the basis of official publications by the European Commission since the beginning of the 1990s.

### 5.2.1 FAMILY CHANGES AS DEMOGRAPHIC CHALLENGE

In 1993 the European Commission, declared the transformation of family structures as one of the major demographic challenges in its White Paper "Growth, Competitiveness, Employment – The challenges and ways forward into the 21st century" (COM(93) 700: 128), namely: the progressive decline in the importance of traditional households (husband, wife and children) as the main economic and social unit in society, the increasing participation of women in the labour market and the decline of birth rates. Moreover, in the first demography report published in 1994, the Commission states that the family "seems to be the key protagonist in future trends in demographic evolution" (COM(94) 595: 41) and defines key points for further consideration:

- The complexity of family histories, e.g. cohabitation and births outside marriage, separation, divorce and reconstituted households.
- The change in the very basis of the family from an institution and means of social integration to a pact between two individuals looking for fulfilment.
- The instability of some families, combined with economic problems, as a challenge for young people (e.g. late independence, loss of fixed reference points).
- Women's emancipation, which – through the massive entry of women into the labour market and control over fertility has entailed radical and permanent changes in

economic and social organisation, and in the relationships between generations and between the genders.

The Commission concludes: "Despite these changes, the family is the main network of individual relationships and solidarity. It plays an important part in social equilibrium. In a period of dwindling resources and doubts about state intervention in the family arena, the time has come to think about an answer to the following question: What place should the European Union give to the family and children in the light of the key issue of social ties and social cohesion?" (Demography Report 1994: 62).

Further aspects of family related transformations considered important by the Commission are, for example, changes in regard to youth as exemplified in the White Paper "A New Impetus for European Youth" (COM(2001) 681). According to this youth has changed significantly in three dimensions: (1) The period of being considered a youth is lasting longer and young people are on average older when they reach the various stages of life; (2) The paths through life are becoming less linear as societies no longer offer the same guarantees; (3) Because of increasingly individualised pathways, the organisation of individuals' family, marriage and career plans is no longer standardised, which is having a particularly strong impact on public authorities' policies.

The Commission also has a special focus on children, for example, in its recommendations "Investing in Children: Breaking the cycle of disadvantage" (European Commission 2013d), which, however, did not link the issue directly to demographic change. Children and youth were also considered one of the priority areas in the Commission's Renewed Social Agenda of 2008 (COM(2008) 412).

### 5.2.2 FAMILY POLICIES TO DEAL WITH THE CONSEQUENCES OF DEMOGRAPHIC CHANGE

In the White Paper "European Social Policy – A way forward for the Union", the Commission stresses the need to adapt social protection systems to new family structures through the individualisation of rights and contributions (COM(94) 333: 36). Another aspect highlighted



is the possibility of reconciling professional and family life, including career breaks such as parental leave. Here the Commission called for the provision of leave arrangements for fathers, as well as mothers, and for policy action to promote a more equal sharing of care responsibility: "Changing demographic trends mean that the responsibility for elderly dependents is moving up the social agenda, although childcare is still the major problem for working parents in many Member States. New social infrastructures are needed to support the household and the family, and the question of how families can be helped to carry the costs remains to be addressed. Progress towards new ways of perceiving family responsibilities may slowly relieve the burden of women and allow men to play a more fulfilling role in society. However, greater solidarity between men and women is needed if men are to take on greater responsibility for the caring role in our societies and if flexibility in employment is not to lead to new pressure on women to return to the ranks of the non-salaried population or be obliged to accept paid work at home in isolation from community" (COM(94) 333: 32f.).

The communication "Towards a Europe for All Ages – Promoting prosperity and intergenerational solidarity" (COM(1999) 221: 11) especially emphasises the need to promote equal opportunities in regard to the goal of reconciling family and working life by:

- facilitating female access to more secure and better paid careers and securing equal opportunities for participation in training and updating of one's skills throughout working life;
- creating a stronger policy focus on reconciliation of family and working life, on fostering a better sharing of family responsibilities between women and men (e.g. elder and childcare) and on more career-friendly employment policies;
- further exploring the possibilities for using fiscal and family policy tools to promote female labour force participation.

In this context the Commission specifically stresses the issue of gender equality in regard to the organisation of care: "[T]he majority of persons needing permanent assistance and care are attended to in their own home by

spouses or other relatives. This is an area where equality between women and men in their share of responsibility is far from being reached: women aged 45-65 provide the bulk of all elder care as unpaid work at home. Yet it is unrealistic to expect women to be able to take on this burden in the context of demographic ageing. It is likely that women's increasing workforce participation will reduce their traditional availability to care for older relations at home just as that need increases. We need to achieve a better sharing of informal caring duties between the genders and a great expansion of the capacity of formal care systems" (COM(1999) 221: 19). Furthermore the Commission calls for special measures to compensate for the frequent inadequacy of pension schemes in meeting the needs of women, e.g. in regard to "the effects of marital breakdown on social pension systems geared to models of male breadwinners in stable nuclear families" (COM(1999) 221: 16).

In 2002 the report "Increasing Labour Force Participation and Promoting Active Ageing" (COM(2002) 9) again refers to the issue of gender equality and employment: "There are strong gender differences in the reasons for inactivity. Men are inactive mainly because of education or retirement, while almost half of inactivity for women aged 25-54 is due to family and homecare responsibilities" (COM(2002) 9: 96). The Commission proposes a life cycle perspective to deal with these issues: "Moreover, appropriate incentives and services at decisive stages in life, for example the provision of childcare facilities for parents and better reconciliation between work and family responsibilities, will avoid early exits from the labour market. Under such a dynamic approach, a reduction in participation at certain points in life – young people taking up studies, adults opting for reduced working time – should be weighed against the advantage of greater participation over the whole life" (COM(2002) 9: 10). It is also emphasised that the provision of support services has a double effect on participation: "In addition to facilitating access to the labour market for those who use these services, they are themselves a major provider of jobs" (COM(2002) 9: 24).

In terms of family policies, the communication "Europe's Response to World Ageing" (COM(2002) 143) also points out the issues of reconciliation and gender equality:

“In relation to the employment rates of women it furthermore underlines the crucial pertinence of policies aimed at securing gender equality in the world of work and reconciling the demands of family and work life” (COM(2002) 143: 7). The gender aspect of pensions is also considered: “Importantly pensions should offer the same incentives to men and women and gender distinctions based on outdated perceptions of the man as the sole or main breadwinner of the family should be phased out” (COM(2002) 143: 9). Finally the issue of care is given attention: “Family and household structures are undergoing profound changes in many countries. Families tend to become less able to manage all the caring possibilities and to provide alone the support required by dependent and frail members. Structures of formal care provision may therefore have to be erected” (COM(2002) 143: 12).

The Green Paper “Confronting Demographic Change – A new solidarity between generations” (COM(2005) 94) addresses the question of reconciliation from a “working life cycle” perspective: “Young employed people may want to spend more time with their children and work more at another time in their life. These demographic changes may therefore lead to a new, more adaptable and flexible organisation of working time. Technological developments are another way of better balancing family life and work” (COM(2005) 94: 8). In this regard the Commission raises the question: “How can young couples’ integration in working life be facilitated and how can we help them to find a balance between flexibility and security to bring up their children, to train and update their skills to meet the demands of the labour market?” (COM(2005) 94: 8). The question of how to best support families – especially women – in regard to the care of dependent family members is also raised for the consultation process initiated by this Green Paper.

One year later, in 2006, the European Commission again reiterates the importance of the reconciliation of work, private and family life in the communication “A Roadmap for Equality between Women and Men” (COM(2006) 92: 5), which calls for action in three areas: flexible working arrangements for women and men, increasing care services and better reconciliation policies for women and men.

In its communication “Promoting Solidarity between the Generations” (COM(2007) 244), the European Commission highlights the importance of reconciliation and gender equality, also in regard to the aspect of intergenerational solidarity: “It has become clear that the balance in European societies rests on a set of intergenerational solidarity relationships which are more complex than in the past. Young adults live under their parents’ roof for longer, while, increasingly often, the parents have to support dependent elderly people. The resulting burdens are borne mainly by the young or intermediate generations, and generally by women. Equality between men and women, and equal opportunities more generally, would therefore appear to be key conditions for the establishing of a new solidarity relationship between the generations” (COM(2007) 244: 3). The focus is on improving the balance between professional and family life, but also on reducing pay disparities between men and women to encourage a fairer sharing of family and domestic responsibilities. The Commission concludes: “National family policies will strengthen solidarity between generations by encouraging a better response to the needs of families as regards childcare and dependency care and a more balanced distribution of family and domestic responsibilities. The anticipated outcome is a better quality of life for all, as well as a situation which is more conducive to the fulfilment of family plans. The new orientations for family policies will also contribute to growth and employment, notably by facilitating female labour force participation” (COM(2007) 244: 9).

The European Commission presented a proposal in its communication “A Better Work-Life Balance: Stronger support for reconciling professional, private and family support” (COM(2008) 635) to improve and modernise the European regulatory framework to better support reconciliation measures to “enable women to achieve greater economic independence and encourage men to play a greater role in family life” (COM(2008) 635: 9). The Commission highlights childcare facilities, leave entitlement and flexible working time arrangements as core components of the policy mix required.

In the “Demography Report 2010”, considering the reconciliation of work and family commitments, the Commission warns: “[P]eople with caring responsibilities still

lack adequate support and suitable arrangements for combining their different responsibilities. As a result, economic growth is hampered because too many people are not able to exploit their high level of skills and education on the labour market. Women are particularly affected because of the persistent gender–employment and pay gaps” (European Commission 2011: 6).

### 5.2.3 FAMILY POLICIES TO INFLUENCE DEMOGRAPHIC CHANGE

In 1995 the second demography report asks: “Are couples really having the children they want?” (European Commission 1995b: 10). Ten years later the Commission is discussing in depth the issue of how to raise fertility levels to reverse the demographic decline in its Green Paper “Confronting Demographic Change – A new solidarity between generations” (COM(2005) 94: 2): “Europeans would like to have more children. But they are discouraged from doing so by all kinds of problems that limit their freedom of choice, including difficulties in finding housing. It is also the case that families (...) do not find the environment in which they live conducive to child-rearing. If Europe is to reverse this demographic decline, families must be further encouraged by public policies that allow women and men to reconcile family life and work. Furthermore the family will continue to play an important role in solidarity between the generations.” The Commission particularly stresses the following obstacles to private choices of having children: late access to employment, job instability, expensive housing and lack of incentives. They concluded: “We must ask two simple questions: What value do we attach to children? Do we want to give families, whatever their structure, their due place in European society?” (COM(2005) 94: 10).

One year later in the communication “The Demographic Future of Europe”, the Commission defines demographic renewal as one of five core policy directions to turn the challenges of demographic change into an opportunity (COM(2006) 571: 5):

“The EU Member States can prevent demographic decline or react to the falling birth rate, which for some of them is reaching a worrying level. These reactions are both necessary and realistic: neces-

sary because surveys show that in all EU countries couples would like to have more children; realistic because international comparisons underline the effectiveness of family and other policies consistently implemented by some countries over several decades to create conditions supportive of those who wish to have children. There are many different such policies but they generally have three aspects in common, aiming to (i) reduce the inequality of opportunities offered to citizens with and without children, (ii) offer universal access to assistance services for parents, in particular for education and care for young children, and (iii) manage working hours to offer both men and women better opportunities for lifelong learning and for balancing their private and working lives. Furthermore, the most recent analyses of the fall in the birth rate emphasise the substantial impact of the rise in the age at which women have their first child, reflecting the growing reluctance of couples to have children. These analyses attach growing importance to reducing uncertainties accompanying the entry of young adults into the labour market and, more generally, to the improvement of their living conditions. In addition, effective gender equality policies make it easier for parents to consider when to have children. We must therefore tackle the problems of access to accommodation, facilitate access to affordable and quality childcare and generally improve the work-life balance through flexible forms of work, making use of new technologies.”

In the communication “Promoting Solidarity between the Generations” (COM(2007) 244), the Commission again stresses that the improvement of family life conditions, particularly by balancing professional and private life, could help Europeans have their ideal number of children: “[E]mpirical comparison shows that the countries which have implemented global policies to promote equality between women and men, have developed integrated systems for the supply of services and individual entitlement to parental leave for both men and women, have invested in the quality of childcare services and have moved towards the more flexible organisation of working time generally have both high birth rates and high levels of female

employment" (COM(2007) 244: 5).

The 2007 demography report argues in a similar way: "While the choice to have or not to have (more) children is and must remain a private one, there appears to be scope for policies to enable families to make their choices" (SEC(2007) 638: 10). The Commission emphasises again that public policies that promote greater gender equality and facilitate the reconciliation of work and family seem to be most successful, since it is primarily women who adjust their career ambitions to the needs of their families, either by dropping out of the labour market or working part-time.

Until today the two main dimensions in the political discussion within the field of "Family and Fertility" at the level of the European Commission regarding the question of how to alleviate the consequences of ageing are (1) reconciliation of professional and family life and (2) equality between men and women. Both approaches are seen as crucial in regard to dealing with the consequences of demographic ageing, but also in influencing – at least indirectly – the demographic development itself.

### 5.3 LEGAL MIGRATION

In this section we will delineate how the issue of legal migration has been discussed in regard to demographic change at the level of the European Commission since the mid-1990s. We do not include asylum, irregular migration and mobility of EU citizens. Although these issues are also relevant in demographic terms, the restricted scope of this paper necessitated a selection due to feasibility reasons. We decided to include legal migration, since it is one of the classical topics within demographic debates.

In the first demography report published in 1994, one chapter is devoted to migration and the question of whether it could help to modify demographic change (COM(94) 595). The Commission concludes that international migration cannot "in any case" counteract the effects of population ageing in the Member States: "Studies at national level have unequivocally shown, that it

takes less than one generation for immigrants settling in a country to adopt its demographic behaviour, in particular as regards fertility and mortality. It is not therefore possible to rely, in order to 'rejuvenate' the population, on the long-term impact of migration. Massive immigration by a population with a very young structure is the only other way of plugging the 'gaps' in our age pyramids. Over and above the practical and ethical problems that massive immigration would entail from the point of view of the reception of these populations, immigration largely by young children, i.e. the group that contains the deficits that are causing ageing, is unthinkable" (COM(94) 595: 77).

The second demography report published one year later also concludes that migration will not work as a compensation for ageing. Migration, however, is expected to play a major role in growth: "Given the fall in fertility and the ageing of the population, the migration balance will become an increasingly important factor in demographic growth in the Union" (European Commission 1995b: 19).

After the Treaty of Amsterdam (1999) came into effect, which established for the first time Community competence for immigration and asylum, the Commission published the communication "On a Community Immigration Policy" (COM(2000) 757) in which demographic aspects also play an important role: "[T]his Communication comes at a time when the question of the role of the EU with respect to immigration is of particular pertinence for a number of reasons. The projected decline in population in the EU over the next few decades has caught the attention of public opinion. At the same time labour shortages in some sectors are creating difficulties in a number of countries. There is a growing recognition that, in this new economic and demographic context, the existing 'zero' immigration policies which have dominated thinking over the past 30 years are no longer appropriate" (COM(2000) 757: 6). Accordingly the communication is primarily concerned about economic migration, claiming that sufficient attention has not yet been given to the role of third-country nationals in the EU labour market nor to the need for accompanying measures in support of the integration of existing and prospective migrants. The Commission, however, stress-

es that related strategies are not focused on the “adoption of a policy of replacement migration (...) as a possible scenario to counteract demographic decline. Rather they make up a controlled approach which is based on a common assessment of the economic and demographic development of the Union, and of the situation in the countries of origin, and takes account of its capacity of reception” (COM(2000) 757: 14). The Commission again underlines that migrants can make a positive contribution to the labour market, to economic growth and to the sustainability of social protection systems. Therefore the Commission calls for a shift to a proactive immigration policy which “will require strong political leadership and a clear commitment to the promotion of pluralistic societies and a condemnation of racism and xenophobia. It will be necessary to emphasise the benefits of immigration and of cultural diversity and, in commenting on issues related to immigration and asylum, avoid language which could incite racism or aggravate tensions between communities” (COM(2000) 757: 22).

The next year the Commission again highlights the importance of migration in times of demographic change, but also the necessity of effective integration in the White Paper “A New Impetus for European Youth” (COM(2001) 681): The “ageing of the population will also make it necessary to call on human resources from outside the European Union in order to make up for labour shortages. Our societies will have to diversify in ethnic, religious, social and linguistic terms. And all this will have to be properly controlled, particularly with regards to young people, if we are to avoid social tensions or negative repercussions for education systems and the labour market” (COM(2001) 681: 9).

In 2003 the Commission published the communication “On Immigration, Integration and Employment” in which the role of immigration in regard to demographic ageing is discussed in more detail: “Within the context of the EU, the immigration policies of one country inevitably have an impact on the others. There is now a common additional factor – the pressure of demographic change throughout the EU. The EU must therefore prepare for current and future immigration in a responsible and effective way” (COM(2003) 336: 26). The Commission warns that a zero increase in net flows would result in

significantly lower rates of employment and economic growth, while it re-emphasises that immigration to fully compensate for the impact of demographic ageing on the labour market is not a realistic option: “Immigration can help in filling current and future needs of the EU labour markets. In addition it can contribute to spreading the effects of the demographic transition between 2010 and 2030 over a longer period of time, bearing in mind that, on its own, it cannot solve all the effects of population ageing. It will therefore be important to find ways of managing (...) migratory pressures through adequate policies of entry and settlement. It will be of equal importance to realise the potential benefits of immigration and to facilitate the integration of immigrants through better policies on immigration and integration at local, regional, national and EU level” (COM(2003) 336: 17). Against this background the Commission discussed a number of challenges concerning immigration as a means to mitigate the consequences of demographic change, for example:

- the attraction and recruitment of migrants suitable for the EU labour force in terms of qualifications, experience and personal abilities;
- the need to ensure a level playing field in regards to the competition within the EU and between OECD countries in terms of suitable migrants;
- the effective integration of migrants into the labour market may require some time and the attenuation of the demographic imbalances will depend largely on permanent immigration;
- the recourse to immigrants should not be detrimental to developing countries (“brain drain”);
- economic immigration should not lead to lasting discrepancies between the sectoral or occupational distribution of immigrants and nationals in the EU;
- shaping immigration requires that changes in the status of migrants or in the duration of their stay are under control and that undeclared work of immigrants is tackled;
- non-economic types of immigration will always play a role in migration flows and it is important to also acknowledge and develop the aptitudes and skills of these immigrants;

- to address the consequences of demographic ageing, the EU must also tap into its existing human resources in terms of immigrants already residing in the EU.

In early 2005 the Commission launched the Green Paper “EU Approach to Managing Economic Migration”, which highlights the need to review immigration policies “recognising the impact of demographic decline and ageing on the economy” (COM(2004) 811: 3). The paper outlines the main issues at stake and puts forward possible options for an EU legislative framework on economic migration regarding the degree of harmonisation, admission procedures for paid employment and self-employment, applications for work and residence permits, possibility of changing employer/sector, rights of migrant workers and accompanying measures.

The Green Paper was followed by “Policy Plan on Legal Migration” in which the Commission defines a road map for the 2006-2009 period containing actions and legislative initiatives to pursue a coherent development of EU legal migration policy (COM(2005) 669). On the level of legislative measures the focus is on the conditions and the procedures of admission for selected categories of economic immigrants (highly skilled workers, seasonal workers, intra-corporate transferees, remunerated trainees). Another focus is on establishing which rights immigrants shall enjoy in employment – not only out of reasons of fairness for the immigrants, but also to establish a level playing field within the EU. On a general level, the Commission again points out that immigration in itself does not provide a long-term solution to falling birth rates and an ageing population, but that it is one of the available tools within a broader policy mix to tackle the effects of demographic change. It is further emphasised that “admission of economic immigrants is as inseparable from measures on integration on the one hand, as it is from the fight against illegal immigration and employment, including trafficking on the other” (COM(2005) 669: 4).

Also in 2005 the Green Paper “Confronting Demographic Change – A new solidarity between generations” (COM(2005) 94) discusses the possible benefits of immigration: “Immigration from outside the EU could help to mitigate the effects of the falling population be-

tween now and 2025, although it is not enough on its own to solve all the problems associated with ageing and it is no substitute for economic reforms. (...) Given the demographic situation in Europe and its geographical environment, this immigration will also be intended to reinforce the population in general, and not only to supply manpower. This means that the admission mechanisms for third country nationals must be managed effectively and transparently, and proactive integration and equal opportunities policies must be ensured, in order to achieve a balance between the respective rights and responsibilities of migrants and host societies. The option of a wider recourse to immigration as part of the response to demographic ageing needs to be discussed at national and European levels, as well as with the countries of origin” (COM(2005) 94: 6).

One year later, in 2006, the Commission defines in its communication “The Demographic Future of Europe – From challenge to opportunity”, the issue of “receiving and integrating immigrants in Europe” as one of the five key areas for constructive policy responses to take full advantage of the opportunities of demographic change. The Commission points out a number of issues that need to be considered in this regard (COM(2006) 571: 4f.):

- The impact of immigrants on population ageing will depend on how well they integrate into the formal economy.
- Immigration may temporarily help to reduce the financial impact of an ageing population when immigrants pay contributions into public pension schemes. However, economically active immigrants will also accumulate their own pension rights. Their longer-term contribution to a sustainable balance in public finances will therefore depend on the existence of well-designed pension schemes.
- For the countries of origin, the emigration of a large section of the young educated population is likely, for certain countries and sectors, to give rise to a “brain drain”. Therefore, the possibilities offered by temporary migration and the voluntary return of migrants to their countries of origin should not be ignored.

The Commission concludes: “[T]he EU today is working with the Member States to develop elements of a com-

mon policy on legal immigration, focusing particularly on immigration for work purposes in order to satisfy requirements in certain sectors of the labour market. This policy should be supplemented by tighter policies on integrating third-country nationals, allocating greater financial resources, and by striking up partnerships with emigration countries" (COM(2006) 571: 11).

One year later the Commission re-emphasises the importance of an effective European immigration policy in its communication "Towards a Common Immigration Policy" (COM(2007) 780: 11): "Immigration can make a significant contribution to the prosperity of the EU, but this requires a big improvement in the match between labour market needs, the skills of migrants and their overall integration." The Commission claims that discussions should focus on the actions needed to manage immigration effectively, on the resources needed and on the potential impact and challenges of immigration. Four possible positive effects of migration are specifically highlighted:

- Immigrants do not only increase the overall size of the labour market, but they may establish themselves as entrepreneurs, while there is also growing evidence of a business case for diversity (e.g. ethnic diversity).
- Immigrants help to alleviate labour shortages, e.g. in the service and health sector due to population ageing and an increase in women's participation in the labour market. In addition, highly-skilled immigrants bring technical expertise, broaden the skill base and improve the quality of human capital.
- Immigration can contribute to the financing of the public pay-as-you-go pension schemes in the medium term, while appropriate pension reforms are necessary in the long term.
- Immigrants contribute to the economic development of the Member States because they are tax payers and consumers of goods and services.

The Commission, however, again points out that the "potential for significant overall gains from immigration can only be realised if integration is successful. Integration policy should therefore be seen as a continuum, running from entry through to settlement and to social and economic inclusion" (COM(2007) 780: 8).

In 2008 the Commission proposes principles on which a common immigration policy should build upon in its communication "A Common Immigration Policy for Europe: Principles, actions and tools" (COM(2008) 359). In the introduction it stresses that: "In a context of an ageing Europe, the potential contribution of immigration to EU economic performance is significant." The Commission defines ten principles grouped under three headings: prosperity, security and solidarity. From the perspective of legal immigration as a means to mitigate the effects of demographic change, the principles defined under the heading of "prosperity" are particularly relevant in which the different threads of the debate thus far are summarised: (1) clear rules and a level playing field, (2) matching skills and needs, and (3) integration as a key to successful immigration.

In its "Communication on Migration" (COM(2011) 248) the Commission aims at placing recent and future policy proposals into a framework that takes into account all relevant aspects and allows the EU and its Member States to manage asylum, migration and mobility of third-country nationals in a secure environment. In terms of the demographic potential of migration, the Commission states (COM(2011) 248: 4):

"A comprehensive migration policy for non-EU-nationals based on common admission procedures, which treats third-country nationals fairly, will moreover contribute to the EU's future prosperity. As underlined in the Europe 2020 Strategy, one of the most pressing economic challenges faced by Europe is the need to address the demographic decline in its working age population coupled with significant projected skills shortages in certain sectors. To remain competitive and allow it to maintain its social model in a sustainable way, Europe needs to adopt measures to improve the employment rates of EU residents, but must at the same time take concrete steps to meet its projected labour needs via targeted immigration of third country nationals."

The discussion about migration and demographic change follows the thematic lines presented so far in the following years. At the general level the focus has moved more towards human and security aspects of migration policy in light of the events in the Southern Mediter-

anean since the 2011 Arab Spring, and wars and other crises from Ukraine to the Middle East and North Africa, which have given the issue a new sense of urgency. Thus the Commission states in its communication “The Global Approach to Migration and Mobility” (COM(2011)743: 2): “Migration is now firmly at the top of the European Union’s political agenda”.

In its communication “A European Agenda on Migration” (COM(2015) 240) the Commission presents a proposal that outlines the steps the EU should take now and in the coming years to build up a coherent and comprehensive approach to reap the benefits and address the challenges deriving from migration, stating that “the reality is that across Europe, there are serious doubts about whether our migration policy is equal to the pressure of thousands of migrants, to the need to integrate migrants in our societies, or to the economic demands of a Europe in demographic decline” (COM(2015) 240: 2). The first part of the new European Agenda on migration responds to the need for swift and determined action in response to the human tragedy in the whole of the Mediterranean and focuses on immediate action in the areas of saving lives at sea, targeting criminal smuggling networks, relocation, resettlement, working with third countries to tackle migration upstream, and providing help for frontline Member States. In the second part four pillars to better manage migration are laid out: (1) reducing the incentives for irregular migration, (2) border management, (3) a strong common asylum policy and (4) a new policy on legal migration.

In the development of the pillar on legal migration – which from the perspective of this paper is the most relevant one – the Commission underlines that the EU is competing with other economies to attract workers with the skills needed, while it is facing a series of long-term economic and demographic challenges: “Migration will increasingly be an important way to enhance the sustainability of our welfare system and to ensure sustainable growth of the EU economy. This is why, even if the case for legal migration will always be difficult at a time of high unemployment and social change, it is important to have in place a clear and rigorous common system, which reflects the EU interest, including by maintaining Europe as an attractive destination for mi-

grants” (COM(2015) 240: 14). The Commission focuses on the following areas within the legal migration pillar to be further developed: well-managed regular migration and visa policy, effective integration and maximizing the development benefits for countries of origin.



## 6. CONCLUSIONS

Over the last 25 years demographic change has been firmly established on the political agenda of the European Commission as a cross-sectional issue particularly relevant in the fields of employment and social policy, health and migration. In institutional terms DG EMPL is most concerned with demographic change with a more general view on demographic developments and challenges, and on how to best mitigate the consequences of ageing, but also with a special focus on employment, social protection and social inclusion. DG SANTE and DG HOME are dealing primarily with those aspects of demographic change that are related to health and migration, respectively.

Overall the Commission specifically highlights four interrelated aspects of demographic ageing: the fall in population, the decline in the number of children and young people, the shrinking workforce and the increase in the number of people approaching retirement age. The main – also interlinked – challenges discussed over the years against this background can be roughly summarised as: How can growth and sound public finances be maintained? How can we adjust well to an ageing and shrinking workforce? How can adequate and sustainable pensions be secured? How can access to a high quality health care system with financial viability and sustainability be assured for all? To deal with these challenges the Commission proposes political activities specifically in five dimensions: demographic renewal, employment, economic growth, migration and integration, and public finances. One approach that is considered to be crucial in regards to more or less all of these dimensions is an increase in the overall size of the workforce. Related and further key concepts of the discussion are, for example, active and healthy ageing, lifelong learning, investment in human capital, reconciliation of work and family, flexible retirement and pension schemes, gender equality, social cohesion, intergenerational solidarity, and innovation and growth.

Over the years the Commission has emphasised more and more the need for a life course approach to mitigate the consequences of ageing by not only focusing on older people, but on all generations by strengthening people's skills, capacities, health, as well as their economic and social integration over the whole life course with a

special focus on the bridges between different stages of life. In the Commission's view, such an investment would lead to larger growth, lower dependency burdens and substantial cost savings in public spending.

One should not forget that most of the political competences regarding legislation and legally binding acts in the policy fields with a special demographic relevance are the responsibility of the national governments of the EU Member States. The main role of the EU in terms of population policies is one of supporting national policy development and fostering exchange of knowledge and best practices. Therefore the accumulation, discussion and dissemination of such knowledge on the European level is crucial to find sustainable solutions to one of the biggest challenges of our time.

- [1] The discussion paper series is part of Population Europe's strategy to promote comprehensive knowledge and new insights that are based on top research findings and to also make them easily accessible to non-academic audiences interested in Europe's demographic future ([www.population-europe.eu](http://www.population-europe.eu)). As the collaborative network of Europe's leading demographic research centres, Population Europe has developed an extensive set of tools to efficiently disseminate research outcomes to researchers, policy makers, civil society, the media and other interested audiences. Furthermore, Population Europe actively promotes direct exchange between scientists and societal decision-makers through regular conferences and workshops jointly organised with its partners.
- [2] In some countries, population policies are known as demography policies as, for example, in Germany for historical reasons (e.g. Bundesministerium des Innern 2015).
- [3] Population policies are much harder to delineate when a broader approach is taken. It is difficult to find a policy area that may not have an influence on the demographic set-up of a society or that may not react to demographic developments. From this perspective, it can be described as an umbrella policy covering all political programmes and activities that are directly or indirectly influencing population variables. Understood in this broad sense, it is a highly complex policy field including numerous different policy areas. This is especially true for industrialised countries like the Member States of the EU: "In fact, whereas population policies in developing countries are generally well defined and focused on a few key interventions (e.g., family planning programs), the situation is different in industrialized countries, which have complex systems of social policies that are more difficult to adjust to fit new orientations. In this context, it is difficult to coordinate population policy measures since they take the form of an array of socioeconomic regulations that must be implemented by many different agencies" (May 2005: 843).
- [4] In the original German text Mayer (2011) talks about "verwalten" and "gestalten".
- [5] [http://ec.europa.eu/economy\\_finance/economic\\_governance/index\\_en.htm](http://ec.europa.eu/economy_finance/economic_governance/index_en.htm) (02.11.15).
- [6] [http://ec.europa.eu/economy\\_finance/publications/european\\_economy/ageing\\_report/index\\_en.htm](http://ec.europa.eu/economy_finance/publications/european_economy/ageing_report/index_en.htm) (27.10.15).
- [7] Implementation of the EU's economic rules is organised annually in a cycle known as the European Semester. For further information, see: [http://ec.europa.eu/economy\\_finance/economic\\_governance/the\\_european\\_semester/index\\_en.htm](http://ec.europa.eu/economy_finance/economic_governance/the_european_semester/index_en.htm) (02.11.15).
- [8] "The Open Method of Coordination (OMC) is used by Member States to support the definition, implementation and evaluation of their social policies and to develop their mutual cooperation. A tool of governance based on common objectives and indicators, the method supplements the legislative and financial instruments of social policy." [Http://europa.eu/legislation\\_summaries/employment\\_and\\_social\\_policy/social\\_inclusion\\_fight\\_against\\_poverty/em0011\\_en.htm](http://europa.eu/legislation_summaries/employment_and_social_policy/social_inclusion_fight_against_poverty/em0011_en.htm) (25.09.15).
- [9] [http://ec.europa.eu/regional\\_policy/en/](http://ec.europa.eu/regional_policy/en/) (02.11.15).
- [10] "Economic and social cohesion – as defined in the 1986 Single European Act – is about 'reducing disparities between the various regions and the backwardness of the least-favoured regions'. The EU's most recent treaty, the Lisbon Treaty, adds another facet to cohesion, referring to 'economic, social and territorial cohesion.'" [http://ec.europa.eu/regional\\_policy/en/faq/#1](http://ec.europa.eu/regional_policy/en/faq/#1) (02.11.15).
- [11] [http://ec.europa.eu/education/policy/strategic-framework/index\\_en.htm](http://ec.europa.eu/education/policy/strategic-framework/index_en.htm) (02.11.15).
- [12] The Innovation Union (<http://ec.europa.eu/research/innovation-union>, 25.09.15) is one of seven flagship initiatives of the Europe 2020 strategy for smart, sustainable and inclusive growth (see paragraph 3.1). It contains over thirty action points with the intention to (1) make Europe into a world-class science performer; (2) remove obstacles to innovation which currently prevent ideas getting quickly to market; and (3) revolutionise the way public and private sectors work together.
- [13] The other two are viable food production and sustainable management of natural resources and climate action.
- [14] See for the summaries <http://eur-lex.europa.eu/browse/summaries.html> (25.09.15).
- [15] [http://europa.eu/pol/socio/index\\_en.htm](http://europa.eu/pol/socio/index_en.htm) (25.09.15).
- [16] This is at least true from the perspective of EU countries that act as receiving countries. It might, however, be an issue when considering the countries of origin, where demographic developments might increase the migratory pressure.
- [17] Data about demographic developments can be found on Eurostat's website in the section "Population and social conditions" (<http://ec.europa.eu/eurostat/data/browse-statistics-by-theme>, 02.11.15). Numerous reports and other publications about demographic topics are available online at <http://ec.europa.eu/eurostat> (02.11.15).

- [18] [http://ec.europa.eu/archives/juncker-commission/mission/index\\_en.htm](http://ec.europa.eu/archives/juncker-commission/mission/index_en.htm) (25.09.15).
- [19] [http://ec.europa.eu/archives/juncker-commission/mission/index\\_en.htm](http://ec.europa.eu/archives/juncker-commission/mission/index_en.htm) (25.09.15).
- [20] <http://ec.europa.eu/social/main.jsp?Catid=502&langid=en> (25.09.15).
- [21] The other areas of “policy and activities” of DG EMPL (see Table 2) touch upon demographic issues more indirectly or in regard to issues that are not within the scope of this paper. For further information see: <http://ec.europa.eu/social/main.jsp?Langid=en&catid=1> (25.09.15).
- [22] <http://ec.europa.eu/social/main.jsp?Catid=1044&langid=en> (25.09.15).
- [23] <http://ec.europa.eu/social/main.jsp?Catid=1044&langid=en> (25.09.15).
- [24] “The Open Method of Coordination (OMC) is used by Member States to support the definition, implementation and evaluation of their social policies and to develop their mutual cooperation. A tool of governance based on common objectives and indicators, the method supplements the legislative and financial instruments of social policy.” ([http://europa.eu/legislation\\_summaries/employment\\_and\\_social\\_policy/social\\_inclusion\\_fight\\_against\\_poverty/em0011\\_en.htm](http://europa.eu/legislation_summaries/employment_and_social_policy/social_inclusion_fight_against_poverty/em0011_en.htm), 25.09.15).
- [25] The Social Protection Committee (SPC) is an EU advisory policy committee for the Employment and Social Affairs Ministers in the Employment and Social Affairs Council (EPSCO) (<http://ec.europa.eu/social/main.jsp?Catid=758&langid=en>, 25.09.15).
- [26] There were also Demography Reports in 1994 (COM(94) 595) and in 1995 (European Commission (1995b)).
- [27] The reports are available online at: <http://ec.europa.eu/social/main.jsp?Catid=502> (25.09.15).
- [28] <http://ec.europa.eu/social/main.jsp?Catid=1065&langid=en> (25.09.15).
- [29] [http://europa.eu/epic/index\\_en.htm](http://europa.eu/epic/index_en.htm) (02.11.15).
- [30] [http://ec.europa.eu/economy\\_finance/economic\\_governance/the\\_european\\_semester/index\\_en.htm](http://ec.europa.eu/economy_finance/economic_governance/the_european_semester/index_en.htm) (02.11.15).
- [31] [http://ec.europa.eu/health/strategy/policy/index\\_en.htm](http://ec.europa.eu/health/strategy/policy/index_en.htm) (25.09.15).
- [32] [http://ec.europa.eu/health/ageing/policy/index\\_en.htm](http://ec.europa.eu/health/ageing/policy/index_en.htm) (25.09.15).
- [33] [http://ec.europa.eu/health/ageing/innovation/index\\_en.htm](http://ec.europa.eu/health/ageing/innovation/index_en.htm) (25.09.15).
- [34] [http://ec.europa.eu/health/health\\_policies/policy/index\\_en.htm](http://ec.europa.eu/health/health_policies/policy/index_en.htm) (02.11.15).
- [35] [http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/legal-migration/index\\_en.htm](http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/legal-migration/index_en.htm) (25.09.15).
- [36] [http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/legal-migration/study-research-or-training/index\\_en.htm](http://ec.europa.eu/dgs/home-affairs/what-we-do/policies/legal-migration/study-research-or-training/index_en.htm) (25.09.15).
- [37] For the following see: [http://ec.europa.eu/europe2020/index\\_en.htm](http://ec.europa.eu/europe2020/index_en.htm) (25.09.15).
- [38] The aim of the Lisbon Strategy, launched in March 2000, was to make Europe “the most competitive and dynamic knowledge-based economy in the world, capable of sustainable economic growth with more and better jobs and greater social cohesion” ([http://www.consilium.europa.eu/en/uedocs/cms\\_data/docs/pressdata/en/ec/00100-r1.en0.htm](http://www.consilium.europa.eu/en/uedocs/cms_data/docs/pressdata/en/ec/00100-r1.en0.htm), 24.09.15).
- [39] The European Commission defines flexicurity as “an integrated strategy for enhancing, at the same time, flexibility and security in the labour market. It attempts to reconcile employers’ need for a flexible workforce with workers’ need for security – confidence that they will not face long periods of unemployment” (<http://ec.europa.eu/social/main.jsp?Catid=102>, 25.09.15).
- [40] See also: [http://ec.europa.eu/index\\_en.htm](http://ec.europa.eu/index_en.htm) (25.09.15).
- [41] The other policy areas are: “Jobs, Growth and Investment”, “Digital Single Market”, “Energy Union and Climate”, “Internal Market”, “Economic and Monetary Union”, “EU-US Free Trade”, “An Area of Justice and Fundamental Rights Based”, “EU as a Global Actor” and “Democratic Change”.

- [42] See the Press Release about the launch of the new agenda from 4 March 2015 under: [http://europa.eu/rapid/press-release\\_IP-15-4545\\_en.htm](http://europa.eu/rapid/press-release_IP-15-4545_en.htm) (25.09.15).
- [43] The objectives in regard to asylum and irregular migration are: ensuring that all EU countries apply asylum rules in the same manner by fully implementing the Common European Asylum System (CEAS); enforcing EU laws that vigorously penalise human traffickers; protecting EU's external borders better by increasing the budget of the European border agency Frontex; cooperating more closely with non-EU countries to smooth repatriation of irregular migrants.
- [44] The Blue Card is an EU-wide work permit for high-skilled non-EU citizens to work and live in any country within the EU, except for Denmark, Ireland and the United Kingdom (Council Directive 2009/50/EC).
- [45] Press release by the European Commission from 10 September 2014 "The Juncker Commission: A strong and experienced team standing for change." ([http://ec.europa.eu/cyprus/news/20140910\\_press\\_release\\_en.htm](http://ec.europa.eu/cyprus/news/20140910_press_release_en.htm), 25.09.15).
- [46] Commission White Papers are documents containing proposals for Community action in a specific area. In some cases they follow a Green Paper published to launch a consultation process at the European level. When a White Paper is favourably received by the Council, it can lead to an action programme for the Union in the area concerned ([http://ec.europa.eu/white-papers/index\\_en.htm](http://ec.europa.eu/white-papers/index_en.htm), 25.09.15).
- [47] The aim of the European Years is to raise awareness of certain topics, encourage debate and change attitudes. "The European Year can also send a strong commitment and political signal from the EU institutions and member governments that the subject will be taken into consideration in future policy-making" ([http://europa.eu/about-eu/basic-information/european-years/index\\_en.htm](http://europa.eu/about-eu/basic-information/european-years/index_en.htm), 25.09.15).
- [48] Article 1 provides that "The Community and the Member States shall have as their objectives the promotion of employment, improved living and working conditions, proper social protection, dialogue between management and labour, the development of human resources with a view to lasting high employment and the combating of exclusion."
- [49] Decision No 2493/95/EC of the European Parliament and of the Council of 23 October 1995 establishing 1996 as the "European Year of Lifelong Learning".
- [50] [http://ec.europa.eu/economy\\_finance/structural\\_reforms/ageing/index\\_en.htm](http://ec.europa.eu/economy_finance/structural_reforms/ageing/index_en.htm) (25.09.15).
- [51] "[T]he basic educational level achieved has a fundamental long-term impact on participation. Activity rates are significantly higher at all stages, the more educated the work force. Preventing the erosion of skills throughout adult working life will increase the chances of people remaining in employment longer. High employment and activity rates among the prime age group could be translated into significantly higher employment rates for older workers up to a decade later if a dynamic approach is taken to retain these workers longer in the labour market through better working arrangements and quality in work. Moreover, appropriate incentives and services at decisive stages in life, for example the provision of childcare facilities for parents and better reconciliation between work and family responsibilities, will avoid early exits from the labour market. Under such a dynamic approach, a reduction in participation at certain points in life – young people taking up studies, adults opting for reduced working time – should be weighed against the advantages of greater participation over the whole life time." (COM(2002) 9: 9f.).
- [52] Green Papers are documents published by the European Commission to stimulate discussion on given topics at the European level. They invite the relevant parties to participate in a consultation process and debate on the basis of the proposals they put forward. Green Papers may give rise to legislative developments that are then outlined in White Papers ([http://ec.europa.eu/green-papers/index\\_en.htm](http://ec.europa.eu/green-papers/index_en.htm), 25.09.15).
- [53] The Commission published several Green Papers with references to demographic change, but these were mostly followed by White Papers, which we included in our discussion instead, e.g. the White Paper on Pensions (COM(2012) 55), which followed the Green Paper "Towards Adequate, Sustainable and Safe European Pension Systems" (COM(2010)365) published in 2010.
- [54] The Communication sets out a series of measures in priority areas identified in the European Commission's communication "Opportunities, Access and Solidarity: Towards a new social vision for 21st century Europe" (COM(2007) 726).
- [55] <http://ec.europa.eu/archives/ey2012/> (25.09.15).

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