

What role for skills mobility in the green agri-food transition?

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INTRODUCTION

As the EU enters a new five-year cycle, its ambitious Green Deal targets and European Climate Law face growing uncertainty due to concerns over industrial competitiveness and economic growth. Additionally, backlash against the EU's climate policies, fuelled by farmers' protests, could hinder the promise of a just green transition.

Yet, as the planet warms rapidly, climate change will continue to affect EU economic sectors, including agriculture and food. Greater climate variability and extremes will impact global food systems, posing supply chain challenges and heightening food insecurity.¹ These trends highlight the need to invest in sustainable agri-food systems as part of climate mitigation and adaptation. With an ageing population and demographic shifts, this transition rests on a stable workforce with both traditional and 'green' skills in the EU and beyond.

The OECD reports that the EU agri-food sector currently has a high rate of skills mismatch and is set to lose a further 13% of its skilled workers, mostly low-skilled, in the next decade.² Beyond seasonal and temporary farm workers, the sector will need medium- to high-skilled workers, not all of whom can be sourced domestically or via reskilling efforts.³ Furthermore, the Green Deal alone is expected to create an estimated 2.5 million more jobs by 2030.⁴

While there has been growing recognition in Europe of the need to scale up labour migration, the EU has been slow to act. As a result, about 60% of small- and medium-sized enterprises (SMEs) report difficulty

finding workers with the right skills.⁵ Yet, it is not only member states that face skills gaps that could undermine their economic productivity but also third countries, where this issue is often coupled with high informal work and youth unemployment rates.⁶

The EU will need to invest in skills mobility pathways to support greening agri-food systems in the EU and elsewhere. This would be in line with its Skills and Talent Mobility package, which aims to enhance legal migration and labour market access, and the global dimension of the Farm to Fork Strategy (F2F). Models like Global Skill Partnerships and newer initiatives such as the EU's Talent Partnerships offer opportunities, but few have focused on the agri-food sector, with most targeting ICT, construction, or healthcare.⁷

This Policy Brief explores the potential of skills mobility pathways – a term used here to encompass all labour mobility initiatives that promote skills development – to support F2F goals. The aim is not just to establish effective partnerships but to calibrate skills mobility to the 'triple win' of sustainable social, environmental, and economic development. Particular attention is given to policy priorities in the new EU cycle and implementation challenges that should be considered to strengthen agri-food-related skills mobility. With re- and upskilling high on the EU agenda but also cooperation on addressing irregular migration, including by offering more labour opportunities to partner countries, a special focus will be placed on the EU's Southern Neighbourhood, particularly North Africa.

BACKGROUND: SKILLS MOBILITY AND THE EU'S FARM TO FORK STRATEGY

While labour and skills shortages in various sectors and skills levels have attracted policymakers' and commentators' attention in recent years, the agri-food sector is often overlooked. Shortages of workers in healthcare regularly make headlines, while skills gaps hindering the transition to clean energy are receiving growing attention.⁸

The agri-food sector is mostly associated with seasonal and informal work. Yet, the EU agri-food sector risks losing up to 13% of mainly low-skilled workers in the next decade, partly due to limited worker attraction and retention and technological innovations supplanting certain roles. While the need for low-skilled labour will remain, most of the 'green' jobs will be at medium to high skills levels. Difficulties in finding a ready workforce for the green transition could widen existing skills gaps.⁹

As the sector adapts, skill profiles already in demand in the EU include specialists in agronomy, food science, circular economy and biotech, farming machinery, as well as "translators" who mediate between people and new technologies.¹⁰ Those with a "T-shaped" profile, meaning transferable knowledge and skills beyond one subject (e.g., engineers and technicians), will also be in growing demand.

Attracting, training, and retaining mid- to high-skilled workers will therefore become a priority. However, it is not only in the EU that these skills are needed but also in non-EU countries.

Skills profiles needed in North Africa include regulators for food safety and quality standards, and experts in precision agriculture, controlled-environment agriculture, circular economy practices, and post-harvest storage and processing to address aridity and temperature challenges.¹¹ Educational and practical training programmes must adapt to climate impacts and evolving farming methods to develop these capacities.

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pathways will have to benefit both origin and destination countries as well as mobile persons to make a difference. They will have to address food production needs and build resilience to climate and socio-economic risks while contributing to human capital development. If skills gaps are not addressed, it will be harder to maintain domestic production levels and reduce emissions as part of the commitment to reach net zero by 2050.¹²

The EU's Farm to Fork Strategy: A contested path to more sustainable agri-food systems

Launched in 2020 in the context of the European Green Deal, the European Commission's Farm to Fork (F2F) Strategy is a comprehensive plan to address the challenges of producing and consuming food in a fair and sustainable way.¹³ The Strategy seeks to strengthen food systems by addressing all stages of the supply chain. It goes beyond "food production and farmers' interests", aiming for a comprehensive transformation through reduced pesticide use and food waste, and lowering animal product consumption.¹⁴ It also reinforced the EU's goal to align trade agreements with sustainability norms and encourage partner countries to match the EU's safety and sustainability standards, widening access to the EU Single Market in return.

However, actions under the Green Deal, European Commission President Ursula von der Leyen's flagship initiative, attracted criticism from within the European Parliament, including from her own political group, the European People's Party (EPP) Group, which tried to present itself as a 'farmers party', and several member states. This led to watered-down legislative and policy initiatives.¹⁵ Protests from farmers in several EU countries further highlighted concerns over demanding administrative compliance, excessive regulations, and market disadvantages.¹⁶

In response, President von der Leyen launched the Strategic Dialogue on the future of EU agriculture in early 2024, seeking to address the challenges facing the agri-food chain with input from farmers. This effort, alongside the Transition Pathway for the agri-food industrial ecosystem, aimed to refocus F2F objectives. The Dialogue Conclusions reflected the importance of skills, knowledge exchange, worker retention, and mobility opportunities, including for non-EU nationals, as outlined in the European Skills Agenda and Agri-food Pact for Skills.¹⁷ However, meeting labour and skills shortages at scale is and will remain a challenge unless more channels and training opportunities are developed.

Models of skills mobility

Existing and future skills shortages raise questions about the suitability of existing mobility pathways to the EU and their alignment with shared climate and sustainability objectives.

At EU level, the EU Blue Card is limited to highly skilled professionals and requires recognised higher education qualifications, which may be challenging to prove with emerging green jobs.¹⁸ The Single Permit does not

contain restrictions on skills levels but is intended for work rather than skills development or training purposes.¹⁹ The one-way nature of these immigration pathways precludes mutual development benefits and has limited impact on driving sustainability agendas forward in Europe and non-EU countries.

Over time, skills mobility models at EU and international levels have evolved, complementing bilateral agreements targeted at national, sector-specific needs, mostly outside the realm of green jobs.²⁰ In 2022, the European Commission proposed a Talent Pool and Talent Partnerships to address skills gaps and improve migration cooperation. The Talent Pool, which remains under negotiation, is an online platform for skills-matching. Talent Partnerships are intended to facilitate mobility of a limited number of persons based on matching skills and labour market needs between member states and partner countries. Flexible in design and implementation, these multistakeholder partnerships involving the Commission, member states, and UN agencies like the International Labor Organization have so far targeted five countries - Egypt, Tunisia, Morocco, Bangladesh, and Pakistan. Exploratory talks are taking place with others. Few details on the sectoral focus are yet available, though agriculture is mentioned in the case of Bangladesh and Egypt.²¹

As reflected in the Talent Partnerships launched so far, skills mobility is however also tied to broader migration or trade cooperation and can be conditional on addressing irregular migration. The choice of the above-mentioned countries is based on their strategic importance for migration management, considering comparatively high numbers of irregular departures as well as low return rates of their nationals.²²

Subsuming labour mobility opportunities into irregular migration considerations is part of a larger trend, as also seen in recent EU deals with Tunisia and Egypt, signed respectively in 2023 and 2024.²³ Primarily aimed at stabilising the economy through macro-financial assistance, the parties also committed to cooperation on reducing irregular migration and increasing return and readmission while investing in legal migration pathways including through the Talent Partnerships.²⁴

While Talent Partnerships could potentially be implemented in a credible and mutually beneficial way, skills mobility could end up an empty promise, considering the dominance of EU-set objectives but also the limited scale of existing and planned partnerships. Despite such human capital development being an economically attractive incentive to cooperate, countries may be reluctant to partner up, especially if they are expected to stem irregular migration, or are wary of brain drain and losing remittances if more nationals return than move abroad for work or training.

Alternative models like Skills Mobility Partnerships (SMP) or the Global Skill Partnership (GSP) could also contribute to global climate and sustainable production goals if targeted to sectors such as agri-food or renewable energy (see Table 1). According to these models, countries of origin and destination invest in skills and training needed in both labour markets, while migrants themselves stand to benefit from greater economic opportunities at home and abroad beyond training and education in the country of origin. Also aligned with the Global Compact on Migration and the Sustainable Development Goals (SDGs), the GSPs are more focused on human capital development at the mid-skills level in countries of origin, whereas IOM's SMPs are more flexible in terms of skills levels and mobility outcomes.²⁵

Table 1.

OVERVIEW OF SKILLS MOBILITY PATHWAYS

Name	Driving Institution	Type of Mobility	Funding Structure	EU Partner Countries	Sectors Covered
Skills Mobility Partnerships (SMP)	IOM	Temporary with option of stay in destination country, onward migration or return to country of origin	Cost-sharing models involving public funding from origin and destination countries, employers, and sometimes migrants	Various (including some pilot projects)	Various, but none related to the agri-food sector
Global Skill Partnership (GSP)	Center for Global Development	“Dual-track” model involving one cohort of ‘home-stayers’ and one cohort moving abroad temporarily	Public-private partnerships with the aim of no cost for the country of origin	Morocco, Kosovo	ICT, construction, and various others
Talent Partnerships	European Commission	Temporary, circular, or long-term	Asylum, Migration and Integration Fund (AMIF) and NDICI	Egypt, Tunisia, Bangladesh, Pakistan, Morocco	ICT, tourism, healthcare, logistics, agriculture, construction
Pilot projects on legal migration (see also State of play section)	European Commission	Temporary or circular	At least 90% covered by AMIF in most cases	Morocco, Senegal, Tunisia, Nigeria, Pakistan, Iraq, Ethiopia, Kenya, Ghana, Egypt	ICT, construction, education, plastics, green economy, agriculture
Bilateral migration schemes ²⁶	National governments	Circular	Public sector	Various	Healthcare, agriculture

STATE OF PLAY: THE GREEN SKILLS-MOBILITY NEXUS IN THE EU'S NEW INSTITUTIONAL CYCLE

At first glance, the new EU policy cycle could offer opportunities to strengthen the links between green skills and mobility pathways. The von der Leyen Commission 2.0 has committed to building on the skills agenda.²⁷ Linked to economic and social imperatives, skills appear across several Commissioner portfolios. In agriculture, addressing the growing risk of generational loss and labour and skills shortages is seen with greater urgency, as reflected in the Conclusions of the Strategic Dialogue. With the new College of Commissioners, the EU is also set to pursue partnerships in areas such as migration and jobs as part of the New Pact for the Mediterranean.²⁸

However, with the prevention of irregular migration as high as ever on the EU and member states' agenda, skills mobility could be deprioritised in the face of other such overriding objectives.²⁹ The stronger focus on industrial competitiveness also entails a more domestic focus on skills development. This shift, coupled with the contested F2F initiatives, could lead to less ambitious EU efforts to align agri-food standards and practices with partner countries, potentially undermining its overall climate commitments and the potential for skills mobility.

With the F2F Strategy focusing primarily on EU domestic goals, limited alignment between the Union and partner countries could have repercussions for both shared sustainability objectives as well as on economic cooperation.

To achieve the green agri-food transition through skills development and mobility, policymakers in the EU and partner countries will have to consider several challenges. This Brief further examines the i) limited alignment on goals, ii) difficulties in aligning skills mobility with employers' needs versus development goals, iii) challenges in the recognition of skills and qualifications, iv) risk of brain drain in EU partner countries, and v) funding stability. Further challenges, such as difficulties assessing skills availability and needs in the agri-food sectors of destination and origin countries, are not examined due to limited space.³⁰

i) Limited alignment between EU and partner countries on F2F standards and goals

With the F2F Strategy focusing primarily on EU domestic goals, limited alignment between the Union and partner countries could have repercussions for both shared sustainability objectives as well as on economic cooperation.

Common agri-food-related challenges and goals are being addressed in various cooperation frameworks. From a climate policy perspective, EU cooperation has advanced the most with Morocco, which is investing in sustainable agricultural value chains as part of the ongoing Green Partnership with the EU since 2022. Also in North Africa, the EU-Tunisia Memorandum of Understanding (MoU) emphasises cooperation on sustainable agriculture and water management, two key issues facing Tunisia's agricultural sector.³¹ While such high-level political commitments are an important step, lagging policy reform on adaptation in the agri-food sector in non-EU countries could make targeted investments in (green) skills development harder. Egypt, for instance, has become more vocal on the importance of food systems at global level, and stands to benefit from EU investments in climate smart agriculture. However, it has no dedicated agri-food strategy beyond its broader Sustainable Development Strategy (SDS) *Egypt Vision 2030* that could act as a basis for closer cooperation, also on skills needs.³²

Limited regulatory alignment and advancement on common climate and agri-food goals could also have economic repercussions for partner countries. Especially for those for whom the EU represents their biggest trading partner, greater access to the EU Single Market could be an important incentive for non-EU countries to undertake policy reform and support adaptation in the food production sector. Countries wishing to export goods such as fertiliser into the EU will have to account for the Carbon Border Adjustment Mechanism (CBAM), set to go into full effect in 2026. Introduced to encourage cleaner industrial production through carbon pricing on non-EU goods, the CBAM, together with tariff rate quotas for certain types of agricultural produce, could spur the green agri-food transition to continue reaping trade benefits. However, the adjustment could prove cumbersome for export partners. Moreover, EU member states might also be reluctant to increase quotas for fruits and vegetables, already exported at high rates from North Africa, due to concerns among EU producers.³³

ii) Difficulties aligning skills mobility with employers' needs versus development goals

At EU level, there has been a small, but growing number of projects focused on the green skills-mobility nexus (see the pilot projects in Table 1). However, in addition to regulatory challenges, difficulties in aligning and meeting labour market needs and development goals could limit skills mobility's appeal, especially for employers and partner countries (see also the sub-section on brain drain).

For instance, the EU's Migration Partnership Facility (MPF), an initiative to facilitate the implementation of the external dimension of EU migration policy, has supported projects like MOVE_GREEN, which provided training and internships to Moroccan graduates in Spain on green economy skills, and MOBILISE, an ongoing training and internship scheme in the Netherlands for young professionals from Tunisia, Egypt, and Ethiopia focused on climate-smart agriculture and horticulture.³⁴ These projects reflect EU member states' preferred mobility pathways. The small-scale nature and emphasis on circular migration, however, limit the potential for longer-term contributions to member states' labour markets. Of the EU pilot projects in the 'green' skills sector, only NET-Work You between Italy and Egypt explicitly mentions potential long-term employment in Europe.³⁵ This circular focus could reduce the attractiveness of such schemes to EU-based employers, as they would not necessarily reap the benefits from investing into the training of prospective workers.

Looking ahead, the Talent Partnerships and the proposed Talent Pool aim to address the gap between skills training and employment by allowing beneficiaries of the Partnerships to register their profiles and find jobs. Compared to other economic sectors, current EU-funded schemes in the green economy suggest a preference for short-term mobility, however. While they enable the validation of skills in labour markets in countries of origin, take up by EU employers, including through the Talent Pool, if adopted, depends on whether targeted, longer-term pathways are made available and whether short-term employment needs are effectively met through the existing pathways.³⁶

Other models focus less on work opportunities and instead prioritise longer-term development by fostering skills growth in countries of origin to build local capacity and prevent brain drain. Various skills mobility pathways, including Skills Mobility Partnerships (SMP) and three Global Skill Partnerships (GSP), have been launched in recent years, reflecting growing interest in this model from governments and the private sector. However, none have yet focused on the agri-food sector. The absence of such programmes may stem from both broader and sector-specific barriers, such as a lack of

funding, dedicated educational curricula or emphasis on seasonal work programmes.

Beyond projects supported through EU migration and development funds, there is potential for programmes like Erasmus+ to support agri-food skills development. However, it remains unclear whether access will be expanded to non-EU nationals or restricted within Europe.³⁷

III) Challenges in qualifications and skills recognition

Difficulties with the recognition of qualifications across the EU27 have long hindered labour market integration for foreign workers. Cumbersome processes, the risk of 'overqualification' and skills mismatch are some of the obstacles identified.³⁸ In 2023, the European Commission issued a Recommendation to simplify, speed up, and harmonise national procedures for skills recognition.³⁹ However, the non-binding nature leaves discretion to member states. Moreover, while several typologies of 'green' skills or jobs exist, it may be necessary to further define them for purposes of mutual recognition and so that they can be linked to shortage occupations.⁴⁰

IV) Risk of brain drain

The SMP and GSP models aim to reduce brain drain by investing in skills development in origin countries and offering flexibility for participants to stay or work abroad. These models are especially important for countries with slow economic growth and high youth unemployment. While their circularity and local training opportunities can assuage fears of losing workers, the prospect of financial remittances - 5-10% of GDP in some countries - provides an incentive for investment if schemes are linked to income-generating activities.

At the EU level, brain drain risks are considered in Talent Partnerships through sector-specific labour assessments. The Talent Pool, if adopted, would offer ways to target shortage occupations relevant to the agri-food sector, such as engineers and technicians. Therefore, there is a risk of depleting talents in these very occupations in origin countries. Morocco, for example, reportedly loses around 600 engineers annually.⁴¹

V) Funding stability

Skills mobility schemes have so far relied heavily on public funding at national or EU levels. While effective as initial 'seed funding', this setup does not ensure long-term sustainability. This may become a greater obstacle should more austere fiscal policies - including in the context of the negotiations on the Multiannual Financial Framework (MFF) 2028-2034 - other than restrictive immigration agendas gain headwind in the next policy cycle. Funding by the private sector and other untapped sources is crucial to mitigate these risks. Despite the private sector's agility, SMEs, more impacted by labour shortages, may need time and reassurances that their investment in training workers will pay off.

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PROSPECTS AND RECOMMENDATIONS

The new EU policy cycle comes with reinforced awareness by the EU and member states of the need to address skills and labour shortages. While the stronger focus on industrial competitiveness and a contested F2F agenda suggest a domestic turn, the EU will not be able to fill gaps through re- and upskilling measures for the existing workforce alone.⁴² Skills development and mobility of non-EU nationals represent an important piece of how the EU and partner countries can undertake the green agri-food transition. Notwithstanding the risks posed by an increasingly restrictive EU immigration agenda, this Policy Brief puts forward the following recommendations:

- **Address challenges in qualifications recognition and ensure transferability of skills:** It is key that EU member states expedite and harmonise skills and qualifications recognition processes. Adapting recognition frameworks to encompass green skills relevant for the agri-food sector is important to ensure the transferability of skills and improve employability across the EU and upon return to origin countries. Especially where skills mobility is only foreseen on a short-term basis, greater alignment between skills mobility schemes and development projects could also support job creation and placement in local markets in countries of origin.
- **Encourage partner countries to align policy and regulatory frameworks with EU sustainability and production standards:** Lacking policy and regulatory alignment around F2F principles could hamper closer cooperation on sustainable food production. The EU should encourage governments of partner countries to align their policy and regulatory frameworks even if couched more in terms of economic and trade benefits rather than climate considerations. Beyond this, similar regulatory environments would enable the development of more tailor-made, sector-specific skills mobility pathways.
- **Promote private sector investment in skills mobility as part of cost-sharing efforts:** The EU, member states, and partner countries should encourage private sector investment in skills development and mobility to ensure longer-term sustainability of programmes. Support from employers' associations, chambers of commerce, and business promotion measures could also help. International financial institutions (IFIs) like the World Bank, European Investment Bank, and European Bank for Reconstruction and Development, which invest in education and skills development, could offer further backing through trust funds or guarantees to build technical expertise in green skills for the agri-food sector.
- **Utilise Talent Partnerships to support skills development for the agri-food sector:** More Talent Partnerships are set to roll out in the new policy cycle, with the choice of partner countries strongly determined by irregular migration considerations. Even so, the EU and partner countries should consider supporting skills development for agri-food jobs. Training programmes should take into account green skills needs. For professionals with relevant profiles for the green agri-food transition, such as engineers and agricultural machine mechanics, EU member states should expedite recognition processes and admission for work purposes.
- **Encourage European agri-food employers to use the Talent Pool, if adopted, to fill shortages in line with shortage occupations, with an eye to 'brain gain':** Considering the acute risk of generational loss in the farming sector, and the limited possibility to fill labour shortages only through re- and upskilling of the domestic workforce, employers in the agri-food sector should make ample use of the Talent Pool to recruit skilled workers, should it be adopted. The European Commission and member states should ensure that shortage occupations are regularly updated, considering the changing nature of green jobs and partner country concerns on the risk of brain drain.
- **Adapt national-level requirements and pathways, including through 'green skills visas':** To address labour and skills shortages in the agri-food sector, and complementary to Talent Partnerships, member states should create more cost-effective opportunities at the national level. This could mean loosening certain admissions criteria in existing pathways. Member states could also consider introducing sector-specific 'green skills visas', also linked to relevant shortage occupations. Notwithstanding potential bureaucratic hurdles and possible issues as to the definition and rapidly changing nature of 'green jobs', this would allow member states to target labour needs in a short time.

Skills development and mobility of non-EU nationals represents an important piece of how the EU and partner countries can undertake the green agri-food transition.

- **Extend the Agri-Food Pact for Skills to partner countries to enable exchange on skills development and mobility beyond the EU context:** The Pact for Skills initiative, launched as part of the European Skills Agenda, is a dialogue aimed at connecting European agri-food stakeholders. It is currently limited to European associations and social partners, national associations, and some international companies. An extension of the Pact to non-EU countries should be considered to facilitate skills development and mobility, foster mutual understanding of the challenges faced along the food-supply chain, and enable skills development and mobility programmes based on both EU and partner country needs.

The European Commission and member states should ensure that shortage occupations are regularly updated, considering the changing nature of green jobs and partner country concerns on the risk of brain drain.

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- ³⁷ European Commission (2024), *Transition pathway for the agri-food industrial ecosystem*, Brussels: European Commission, p. 44.
- ³⁸ Celine Chateau (2023), Unlocking Third-Country Nationals' Full Potential to Feed in the EU Future of Work, in: *System Updates: Resetting the Future of Work*, Washington, DC: Bertelsmann Foundation.
- ³⁹ Commission Recommendation EU 2023/7700 of 15 November 2023 on the recognition of qualifications of third-country nationals.
- ⁴⁰ The ILO defines 'green jobs' as “decent jobs in any economic sector (e.g., agriculture, industry, services, administration) which contribute to preserving, restoring and enhancing environmental quality”, while organizations like Cedefop define 'green skills' as “the knowledge, abilities, values and attitudes needed to live in, develop and support a sustainable and resource-efficient society”. See: OECD (2023), *Job Creation and Local Economic Development 2023: Bridging the Great Green Divide*, Paris: OECD Publishing.
- ⁴¹ ETF (2021), *Skills and Migration Country Fiche Morocco*, Turin: European Training Foundation, p. 7.
- ⁴² See also: Tommaso Grossi (2024), *Skills for Tomorrow: What Strategies for Building a Competitive EU Workforce?*, Discussion Paper, Brussels: European Policy Centre; and Anastasia Karatzas (2024), *Skills for Tomorrow: Unlocking the Potential of Mobility and Labour Migration*, Discussion Paper, Brussels: European Policy Centre.