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Policy Brief

ELEVATING DIGITAL TALENT PARTNERSHIPS BETWEEN THE SOUTHERN NEIGHBOURHOOD AND EU13 COUNTRIES

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The continued global economic recession brought by the COVID-19 pandemic has placed enormous burdens on labour markets worldwide, and hampered the mobility of workers across countries. Despite improvements to digital access and infrastructure, significant labour gaps in the Euro-Mediterranean market remain unresolved. As EU13 countries aim to recruit highly-skilled, foreign information and communication technology (ICT) experts to meet the needs of their aging and highly mobile societies,[1] a pool of tech-savvy youths across the Mediterranean is actively seeking out international opportunities to apply their digital skills, as North African countries grapple with high youth unemployment. The potential of young ICT talents to help spur growth and shared prosperity in the Euro-Mediterranean market is therefore sizable. In order to unleash this potential, a mutually-cooperative migration policy that champions new legal labour mobility and innovative upskilling and reskilling schemes is more urgent than ever.

The good news is that the groundwork has already been laid. The 2015 Valletta Summit on Migration paved the way for numerous migration governance initiatives between the European Union (EU) and partner countries around the globe. To strengthen cooperation against irregular migration across

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[1] EU13 stands for the group of member states admitted to the EU since 2004: Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovak Republic and Slovenia, Romania, Bulgaria, and Croatia.

the Mediterranean, the European Commission (EC) launched the Mobility Partnership Facility (MPF),[2] a programme that co-funds innovative pilot initiatives that offer legal alternatives for migration. To date, ten projects are in operation (EC, 2022).[3] Last summer, Commissioner for Home Affairs Ylva Johansson built on the lessons drawn from early pilots and launched the Talent Partnership (TP) programme under the New Pact on Migration and Asylum to strengthen mutually-beneficial, cooperative labour arrangements with third countries (EC, 2021a; EC, 2021d). These partnerships are expected to initially pair up European and North African countries, before gradually branching out to include the Sahel and Sub-Saharan African regions (EC representative, personal communication, January 18, 2022).

Similar priorities have also been introduced by the New Agenda for the Mediterranean. The document pays special attention to leveraging the digital-migration nexus in the region to build up digital and innovation ecosystems. For instance, under Pillar 2, Flagship 7, the Agenda envisions support for Tunisia's 2025 Strategy for Digital Transformation and the development of Morocco's digital and innovation ecosystems. Furthermore, Pillar 3 emphasises the importance of flexible labour mobility schemes in establishing legal pathways to Europe (EC & EU HR/VP, 2021).

Taken together, these initiatives offer a solid framework for identifying complementarities between the digital ecosystems of the EU13 and Southern Neighbourhood countries. Going forward, the EC should define the contours of future sustainable TP programmes which, on the basis of close cooperation, would unleash the untapped potential of the ICT sector in both regions.

An EU13 model for leveraging the migration-digitalisation nexus

Among the ten MPF pilot projects that target legal migration and mobility, Lithuania's Digital Explorers stands out among the implementers since it is the only project that has leveraged the migration-digitalisation nexus to scale up linkages between an EU13 and a non-EU country. Launched in January 2019, the project advances a careers development programme that aims to "make an unexpected connection" between Lithuanian and Nigerian ICT markets. It combines elements of institutional exchange, temporary skilled labour mobility, and reintegration into the country of origin, as well as collaborations with the private sector to pair young Nigerian tech talents with Lithuanian enterprises (Digital Explorers, 2019).

From 2019 to 2021, 30 young Nigerians were trained and 26 of them relocated to Lithuania on two mobility tracks: a one-year employment contract[4] or a 6-month paid traineeship.[5] They joined 13 companies specialising in ICT, engineering, FinTech, and data science. Both sides were supported throughout the programme. On the one hand, Nigerians undertook technical and soft skills training to further enhance their career prospects, while, on the other, companies were consulted on business development in Africa, integrating international and diversity management (The Baltic Times, 2019). After the programme, 18 participants were retained by Lithuanian ICT companies, while others returned to continue their careers in Nigeria. In November 2021, Telesoftas, one of the participating

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[2] The Directorate-General for Migration and Home Affairs tasked the International Centre for Migration Policy Development (ICMPD) to implement MPF in 2015.

[3] As of February 2022, these projects include Belgium, France, Spain, Lithuania, Slovak Republic and Italy on the EU side, and Morocco, Tunisia, Egypt, Nigeria and Senegal on the Southern Neighborhood partner countries side.
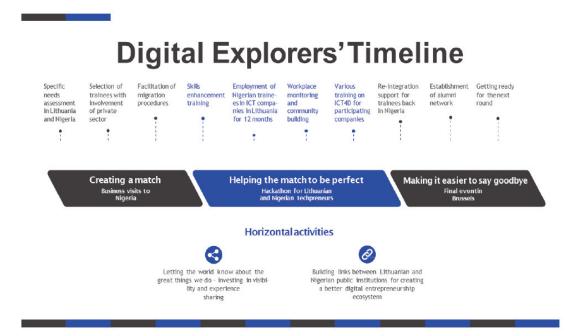
[4] In contrast to other MPF pilots, Digital Explorers explicitly facilitated employment rather than educational opportunities or other schemes which do not depend on contractual commitments and salary payments by participating companies. While the project provided comprehensive facilitation, Nigerian professionals were directly employed by Lithuanian firms. Salaries paid by companies were the only financial compensation that specialists received. Likewise, ICT companies did not receive any direct financial contributions from the project (Friederici, 2021).

[5] In the spirit of the "dual-track" approach of Global Skills Partnerships, 15 participants of the Female Track received immersive training in data science, four of whom remained in the Nigerian market afterwards.

Lithuanian ICT companies, opened its first international branch in Nigeria's capital, Abuja, and also aims to hire at least 30 local engineers by the end of 2022 and up to 100 in 2023 (Modern Diplomacy, 2022).

During the preparatory stages of the project, the Lithuanian Ministry of Foreign affairs opened up visa centres in Abuja and Lagos to accelerate visa processes (Lithuanian MFA, 2019). In parallel, Lithuanian and Nigerian public organisations were matched to exchange knowledge about FinTech regulation, digital entrepreneurship and start-up promotion. Other activities included a public outreach campaign to generate goodwill among future stakeholders and attract candidates in Nigeria and companies in Lithuania, a comprehensive arrival package for Nigerian professionals, and reintegration support for participants returning to Nigeria (see Figure 1).[6]

Figure 1. Workflow of Digital Explorers programme

Source: Digital Explorers (2019).

Notwithstanding its experimental nature and mobility hurdles posed by the pandemic, the project shows positive outcomes and offers valuable insights into the mutual benefits that TP programmes in the ICT sector like Digital Explorers can create. One of the key strengths is stakeholder heterogeneity. The programme enjoys considerable support from ongoing collaboration between public, private and non-profit organisations in Lithuania and Nigeria (Friederici, 2021).[7] Official support from the Lithuanian Ministry of Foreign Affairs, the Ministry of Economy and Innovation, and the Ministry of Social Security and Labour minimised bureaucratic and operational challenges throughout the programme.

The ingenuity of Lithuania's Digital Explorers is a reminder why EU13 countries should be at the forefront to help spearhead exchanges between the EU and its Southern Neighbourhood partners. Its engagements with Nigerian partners indicate that TPs can create a crucial gateway into new talent pools and knowledge about export markets and business practices on both sides. These

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[6] The interviewee also mentioned that Tunisian talents would also greatly benefit from particular organisational skills such as meeting deadlines and team communication.

[7] For instance, see UX Riga (2021).

mutual interactions create positive spillover effects on the market and immigration, such as augmenting institutional capacities to absorb flows of migration and spur innovation, as well as attracting new flows of foreign direct investment in the post-pilot period.[8] Nevertheless, although Digital Explorers has the capacity to serve as a blueprint for new TPs, the operational architecture behind the pilot programme should not be straightforwardly replicated in the Southern Neighbourhood.

For EU13 countries to effectively design and administer similar matching programs, they need to thoroughly consider the readiness of their own ICT ecosystems, enterprises, and human capital. Likewise, specific needs and skills mismatches should be assessed for the Southern Partners. Finally, with a view of managing feasible risks of "brain drain," pre-departure and reintegration activities should target not only talents set for legal migration pathways, but also candidates remaining in the labor markets of the Southern Neighborhood countries.[9]

The EU13 ICT sector: opportunities and challenges for talent matchmaking

Unsurprisingly, old member states have played a dominant role in leading development cooperation across the Mediterranean. However, both "hard" (technical) and "soft" (people) indicators suggest that many EU13 countries have implemented reforms that now place them in a strong position to meaningfully cooperate with countries in the Southern Neighbourhood on labor mobility.

Regarding migration, EU13 countries have embarked on reforms to improve labor market mobility for non-EU nationals in recent years. On the Migration Integration Policy Index's labour market mobility dimension, the EU13 countries (as a bloc) scored 46 out of 100 in 2020, recording a nine-point increase from 2013 (Solano & Huddleston, 2020).[10] Moreover, the bloc agreed to adopt the EC's 2014 Directive on Intra-Corporate Transferees, which sets the conditions under which companies can legally transfer third-country managers, specialists, and trainee employees from their foreign branches to work in the EU (EC, 2014). For TPs, instruments like the Intra-Corporate Directive can, for instance, provide EU13 countries with greater flexibility in elevating the initial gains made by their pilot programmes in the future.

On the technical side, the ICT sector has proved to be the most resilient economic sector to the boom and bust cycles. From 2011 to 2020, the share of ICT specialists in total employment across the EU increased from 3.0% to 4.3% (Eurostat, 2021). This translates into a 50% increase in absolute terms, which outpaced the growth of total employment nearly nine times. The pandemic accelerated this process even further, with the annual growth rate reaching 7.5% between 2019 and 2020 (Eurostat, 2021). Despite this growth, shortages of ICT specialists in Europe were estimated to reach around 500,000 by 2020, with an additional 50,000 vacancies estimated for each year until 2025 (European Communities, 2017).

The need for ICT specialists is even more pronounced in Central and Eastern European countries, the nucleus of the EU13 bloc. The region's labour capacity is reaching its limits due to increased age-dependency and brain drain, which further hinders digital-led growth. Estonia already reports among the highest proportion of ICT specialists in total employment (6.5%) in the EU, whereas Czechia, Malta, Slovak Republic and Slovenia are in line with or surpass the EU average (4.3%) (Eurostat, 2021). Nevertheless, the EU13 countries have made impressive strides in transforming their digital ecosystems. In 2020, the regional digital economy grew more than 10% (Grzegorczyk,

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[8] In May 2020, Baltic countries coordinated to form the first "travel bubble" in Europe.

[9] For more on the "dual-track" approach in Global Skills Partnerships, see Clemens and Gough (2018), also methodologies of PALIM legal migration pilot and Female Track of the Digital Explorers programme.

[10] While this was lower than the EU average of 52, it nevertheless represents improvements over the years.

2020). Their digital infrastructures are well-developed and citizens enjoy relatively low Internet prices, extensive 4G coverage (<90%), and a broadband connection that covers nearly 50% of the region's territory. In the past decade, there has also been an unmatched increase in the value of attracted venture capital, coupled with a new market of almost 12 million users of online services in the region (Marciniak et al., 2020).

In light of these obstacles, digital TPs with Southern Neighbourhood countries can give a much needed boost in deepening the EU13 digital economies. Likewise, talent mobility programmes in the digital sector can mutually support partner countries' efforts to transform their economies in line with their national digital strategies. For countries already supplied with high-skilled ICT talents like Tunisia and Morocco, TPs can, based on Telesoftas' successful opening of its first foreign subsidiary in Nigeria, usher in foreign direct investments that contribute to unemployment reduction. For countries experiencing comparatively lower human capital to drive digital transformation, such as Egypt and Algeria, TPs with EU13 countries provide non-EU talents with an immersive environment to further apply their ICT digital skills and gain exposure to international digital business practices (Moneim, 2020; Digital Arabia Network, 2020).

A closer look at EU13 digital profiles

The capacity and density of each EU13 country's digital ecosystem vary across the European spectrum (see Figure 2 and 3). In particular, three clusters emerge when gauging their digital potential: *Digital Frontrunners, Digital Accelerators* and *Digital Arrivers.* Based on these regional imbalances, not all EU13 countries possess the digital readiness to drive and sustain digital TP programmes.

Cluster 1: Digital Frontrunners

EU13 countries with high readiness to leverage TPs in the ICT sector are Estonia, Malta and Slovenia. They rank among the highest in the EU's Digital Economy and Society Index, even leading some of the old member states such as France, Portugal and Italy (EC, 2021b).[11] This cluster scores notably higher than the EU average with respect to human capital. Estonia and Malta also perform significantly higher than their European counterparts in sub-components, such as the share of ICT graduates, number of employed ICT specialists, and individuals with above basic digital skills (EC, 2021c). Notwithstanding their comparative advantages, some *Digital Frontrunners* countries face the need to upskill their digital workforces. For instance, only 17% of Estonian companies provided ICT training to their employees in 2021 (the same percentage as in 2019), below the EU average of 20% (EC, 2021c).

Cluster 2: Digital Accelerators

EU13 countries in the *Digital Accelerators* cluster Croatia, Czech Republic, Latvia, Lithuania, and Slovak Republic – show comparatively moderate readiness although they continue to make great strides in accelerating digital transformation. In comparison to their *Digital Frontrunners* counterparts, the human capital among these countries is relatively in line with, or slightly below, the EU average. The Czech Republic maintains a demonstrably higher proportion of the number of enterprises providing ICT training to their employees than the EU average and other countries in this cluster (EC, 2021c). Lithuania and the Slovak Republic fall behind their counterparts in the share of ICT graduates (EC, 2021c). While there are variations across the sub-indicators of the human capital, a common challenge that runs through this cluster is shortage in the supply

[11] The Digital Economy and Society Index monitors Europe's overall digital performance and tracks the progress of EU countries regarding their digital competitiveness. Reports on the performance of member states in digital connectivity, skills, public services and online activities are released on an annual basis.

of ICT specialists to meet the demands of the labour markets. Although the Czech Republic leads the pack in this aspect, the geographic concentration of digital expertise predominantly in the capital is a barrier to digital transformation in smaller cities with fewer digital opportunities (EC, 2021c).

Figure 2. Digitalisation and innovation in EU13 and Southern Neighbourhood countries[12]

Countries	2021 Digital Economy and Society Index (DESI) / out of 27 EU countries	Human capital / out of 27 EU countries (DESI 2021)	Digital Integration of Digital Technology / out of 27 EU countries (DESI 2021)	Global Innovation Index (GII) / out of 132 countries	ICT infrastructure / out of 132 countries (GII 2021)	% of ICT services exports in total trade / out of 132 countries (GII 2021)
EU13						
Bulgaria	26	27	27	35	42	20
Croatia	19	16	13	42	39	34
Cyprus	21	23	20	28	14	1
Czech Republic	18	15	15	24	53	44
Estonia	7	5	9	21	5	19
Hungary	23	22	26	34	55	54
Latvia	17	20	23	38	68	17
Lithuania	14	17	12	39	40	60
Malta	6	11	4	N/A	20	94
Poland	24	24	24	40	24	37
Romania	27	26	25	48	52	10
Slovak Republic	22	19	21	37	54	63
Slovenia	13	13	8	32	25	66
Southern Neighbourhood partners						
Algeria	N/A	N/A	N/A	120	112	106
Egypt	N/A	N/A	N/A	94	92	73
Morocco	N/A	N/A	N/A	77	90	30
Tunisia	N/A	N/A	N/A	71	78	76

Source: Prepared by the authors based on data from EC (2021e); World Bank (2019)

Cluster 3: Digital Arrivers

EU13 countries in the *Digital Arrivers* cluster Bulgaria, Cyprus, Hungary, Poland, and Romania demonstrate below-average readiness although their governments continue to develop and promote ICT initiatives. In terms of the overall human capital, their performances are among the

[12] Despite the usefulness of rankings of DESI and GII, countries should be compared with one another with respect to actual values of various sub-indicators (i.e. broadband coverage) instead of the overall ranking itself.

lowest in the EU. For instance, while Bulgaria has a slightly higher share of ICT graduates than the EU average, people with at least basic digital skills account for 29% of the total Bulgarian population aged 16 to 74 (EC, 2021c).[13] In addition, there are shortages of ICT specialists in the labour market, and 7% of Bulgarian enterprises now only provide ICT training to their employees as opposed to 10% in 2019, which is considerably less than Hungary (16%) and Poland (18%) (EC, 2021c). The skills mismatch is especially stark in Romania, reporting an above average share of ICT graduates (6.3% vs. 3.9% of the EU) but a below average share of ICT specialists (2.6% vs. 4.3% of the EU) (EC, 2021c). Moreover, the number of Romanian companies that provide ICT training to their employees remained unchanged from 2019 at 6% (EC, 2021c).
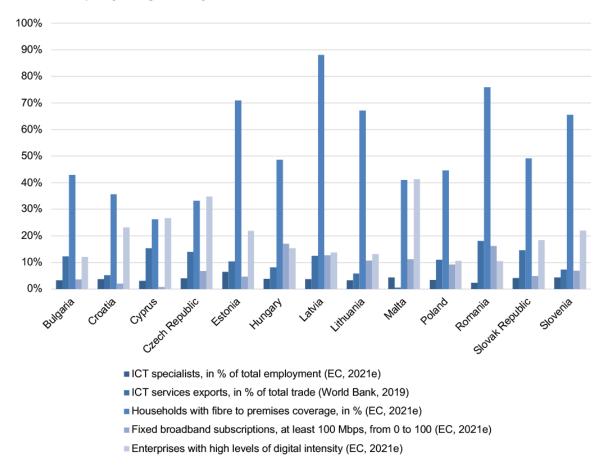
Figure 3. Capacity of digital ecosystems in EU13 countries

Source: Prepared by the authors based on data from EC (2021e); World Bank (2019)
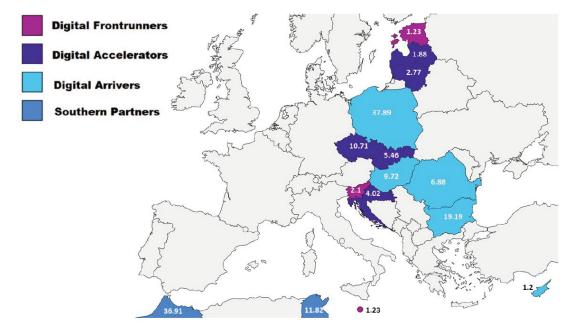
The Baltics and Tunisia: new partners for digital growth

Comparison of market sizes along with soft and hard indicators of digital readiness among EU13 and Southern Neighbourhood countries indicates several options for matchmaking. First, Tunisia can either be paired with the Czech Republic, the Adriatic (Slovenia, Croatia), or Baltic (Lithuania, Latvia, Estonia) countries due to the single or combined capacities for digital talent intake and overlapping networks of stakeholders (i.e. regional businesses, intergovernmental institutions, and ICT associations). Second, Poland and Morocco can also be paired due to similar market sizes, although the former's overall digital readiness is one of the lowest in the EU (EC, 2021c). Given that Lithuania

[13] The EU average for basic digital skills is 56%.

is the only EU13 country that has so far implemented a TP within the MPF framework with a non-EU country, a Baltics-Tunisia match that builds on the experiences of the Digital Explorers programme would be the most feasible option. A coalition of Baltic countries, guided by the EC, can leverage shared resources, expertise and skills that help address the needs of both regions and bring in greater mutual returns than an individually-led initiative by a single member state.

Figure 4. Country clusters and population size (millions)

Source: World Bank (2020)

The Baltics offer a broad selection of ICT sub-sectors for talent placements in local and international tech corporations, as well as within the vibrant start-up scene. Estonia excels in e-government, Lithuania serves as a European FinTech hub, whereas Latvia as much as others sees a high demand for mobile and web developers, quality assurance specialists, data scientists and other ICT specialists (Lithuanian digital economy researcher, personal communication, January 20, 2022). On the other hand, a Baltics-Tunisia match would elevate the digital and innovative potential of Tunisia's economy. For the past years, the Tunisian government has sought to look beyond the manufacturing sector as sources of transformation by making ICT the new centrepiece of its economic agenda.

Through different initiatives, Tunisia has cultivated strong fundamentals for ICT talent development from primary to higher education. The "Tawasol" project led by the Institute of Electrical and Electronics Engineers connects primary schools across the country to the Internet, and provides students with ICT skills workshops (Abdel-Sadek, 2021). Forty percent of Tunisian universities specialise in ICT technologies, whereas more than 2,000 European companies and 3,500 other global companies have been established in Tunisia, including tech giants, such as Microsoft, IBM and Cisco (Invest for Jobs, 2020). The Tunisian digital economy is set for further growth, with the World Bank recent investments providing 175 million USD for the development of innovative start-ups and small and medium-sized businesses (SMEs), as well as e-services in social security and education systems (World Bank, 2019).

Tunisia stands out among its Southern Neighbourhood partners with a large and dynamic pool of young ICT talents.[14] Each year, roughly 10,000 students graduate from universities in ICT-related areas (Tunisia Investment Authority, 2019). Furthermore, Tunisia ranks 9th among the 19 economies in the Middle East and North Africa (MENA) region in terms of innovation capabilities, higher than Morocco, Egypt and Algeria (Global Innovation Index, 2021). A new committee in the Ministry of Education was also recently organised to discuss the issue of ICT talent cultivation (CEO of a Tunisian FinTech start-up, personal communication, January 12, 2022).[15]

Although Tunisian universities have successfully equipped their graduates with strong technical skills, much work is needed to strengthen their non-tech competencies such as project management and organisational skills (CEO of a Tunisian FinTech start-up, personal communication, January 12, 2022). Through more hands-on experiences and exposure to the international working environment, these Tunisian ICT talents would be able to enhance these skill sets so that they, upon their return to Tunisia, can help spur digital growth. Moreover, there is a talent gap in Tunisia when it comes to digital design and user experience (UX) (Tunisian digital economy expert, personal communication, January 21, 2022), which could be effectively tackled through upskilling and reskilling placements in Baltic countries that have, in the past years, seen a fast-paced growth in these ICT sub-industries.[16]

Involving the Baltics in the multilateral approach of stakeholders to support Tunisia's digital growth can enable forms of partnerships that are grounded in the notion of transregional solidarity and cooperation at eye level. Estonian, Latvian and Lithuanian enterprises would benefit from the expertise of Tunisian ICT specialists, knowledge about areas of untapped potential in North African markets, and the multicultural values they bring to their host countries. Likewise, the Baltic countries would also be more sensitised to the needs of the Tunisian digital economy and be in a better position to design talent programmes for sectors where returnees could make the most impact, including hospitality, tourism and freelance (Tunisian digital economy expert, personal communication, January 21, 2022).

Corresponding with the goals of the EC, lessons learned from the Baltics' initial foray can potentially expand the scope initiative to include new host countries and partner countries outside of the Baltics and North Africa.

Recommendations

To promote economic convergence and prosperity in the EU and the Southern Neighbourhood, the **EC should incentivise EU13 governments to explore possibilities for digital talent partnerships with North African counterparts.** Starting with the Baltics-Tunisia pair, the EC should take the following steps:

1. **Incentivise regional EU13 cooperation**
   Existing regional cooperation platforms should be leveraged to spearhead partnerships with the Southern Neighbourhood. For instance, the Baltic Assembly and the Baltic Council of Ministers can be mobilised to promote high level coordination. The focus on the migration-digitalisation nexus would be a logical continuation of the Baltic dialogue on digital transformation, already prioritised on the trilateral agenda. Lithuania, Latvia and Estonia could also build on good faith acquired through joint COVID-19 pandemic response[17] and collaborations on strategic energy and infrastructure projects, such as Baltic electric grid synchronisation and Rail Baltica. High-level Baltic government representatives would also be able to initiate and maintain fruitful dialogues on core issues such as

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[14] Examples of successful matching of European ICT companies and Tunisian talents are already accumulating. Among others, the Tech216 initiative of the Digital Transformation Center Tunisia serves as a point of contact for German companies aiming to outsource IT services and processes to Tunisia or to develop joint business projects. Pilots between BMW Group and two Tunisian IT service providers have been running since early 2020 (Invest for Jobs, 2020).

[15] The interviewee also mentioned that Tunisian talents would also greatly benefit from particular organisational skills such as meeting deadlines and team communication.

[16] For instance, see UX Riga (2021).

[17] In May 2020, Baltic countries coordinated to form the first "travel bubble" in Europe.

the simplification of visa procedures and other immigration reforms to enhance digital talent attraction strategies collectively.

Non-governmental voices, such as business leaders and experts, would also help shape the dialogue on a joint Baltic approach to TPs through consultations with ICT associations like INFOBALT Lithuania, Latvian IT Cluster, and ITL Estonia.

2. Organise an annual EU13-Southern Neighbourhood digital summit
The investment authorities in EU13 countries should collaborate with each other and their Southern Neighbourhood counterparts in organising an annual summit to promote exchanges between specialists, companies and administrative bodies from both regions. The EC should foresee allowances administered through competitive open calls via the ICMPD for organising the summit for EU13 and North African stakeholders. This would enable them to develop meaningful networks, familiarise themselves with each other's markets and talent potential, and learn about EU instruments available for private sector initiatives. Activities such as hackathons can also be set up as part of the summit's programme where EU13 business representatives can directly engage with North African specialists on business problems that would allow them to better assess the needs of the local markets and consider models that champion "brain circulation" as opposed to brain drain.[18]

3. Invest in studies of other potential matches
The EC should allocate funds to study other potential matches like Poland-Morocco, Czech Republic-Tunisia, and Adriatic group-Tunisia. These studies should pay special attention to the interoperability of target ecosystems based on "soft" (i.e. diversity, language, culture) and "hard" (i.e. dominant coding languages and ICT sub-sectors) aspects. This would comprehensively provide the Commission with more nuanced profiles of key stakeholders and beneficiaries critical for strengthening future legal migration pathways that would help close the skills and labour market gaps across the Euro-Mediterranean.

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[18] For instance, see the video recap of the selection hackathon of the Digital Explorers project (Ventures Platform, 2019).

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