

## **EU Demographic Outlook 2026: Supporting the Mainstreaming of Demographic Considerations in EU Policies**

As governments worldwide begin to acknowledge the significance of demographic challenges posed by declining fertility rates and ageing populations with dedicated population strategies, the EU has been anticipatory in addressing these issues.

In 2019-2024, the EU assigned an exclusive and dedicated competence on demography and democracy to Vice-President Šuica. One of the key legacies of this mandate has been the release of the Communication on the Demography Toolbox.

The Toolbox provides a mapping of national and EU policies, structured around four pillars: supporting parents in reconciling family aspirations with paid work; empowering younger generations to thrive, develop their skills, and access the labour market and affordable housing; empowering older generations and sustaining their welfare through reforms and labour market policies; and addressing labour shortages through managed legal migration, complemented by harnessing talents from within the EU.

The Communication has been recognised by several commentators as a good starting point for establishing a long-term policy agenda on demography.

The current Commission has maintained a responsibility for demography, which is assigned to Commissioner Šuica within a larger responsibility for the Mediterranean region.

The Commissioner's mandate specifies four main areas of work for demography: 1) implementing the Demography Toolbox, 2) addressing international aspects of demography, 3) promoting regular dialogues and exchanges at all levels, and 4) increasing labour force participation.

The generic reference to dialogues can be seen as a continuation of the approach outlined in the Demography Toolbox, which, amongst others, aims to mainstream demographic considerations within and outside the Commission.

Given the fragmented competences on demography across policy domains as well as the limited legal space for manoeuvre under the Treaties, policy coordination efforts remain the main avenue for action to move from mapping to policy implementation.

In this paper, we demonstrate how part of the task of policy development and implementation is supported through analytical efforts, translating population

statistics and projections into analyses of their implications for labour markets, public finances, long-term care (LTC), health, and social policies such as housing and inter-generational fairness.

The paper is timely, coinciding with the release of updated population statistics, national population projections by Eurostat in March and April 2026, and regional projections calibrated on the national level by the Joint Research Centre in May 2026.

The paper is structured into three main sections.

The first part briefly describes EU trends, drivers based on original EU data and projections.

The second part explores the implications for policy areas, showing how demographic projections are used to inform EU policies. The analysis starts from two main high-level references: the Draghi and Letta reports, which are extensively referred to in the mandate letters for the current Commission, and progresses to consider the main demographic insights in analytical documents produced by policy Directorates-General in the Commission: the 2024 Ageing Report, the 2025 Employment and Social Developments in Europe report, the 2023 Cohesion Report, the 2025 Annual Report on Taxation, the 2021 Long-Term Care Report, the forthcoming Staff Working Document on the Affordable Housing Plan, and the Intergenerational Fairness Strategy.

The third part concludes by highlighting directions for future policy development informed by demographic concepts, such as demographic inertia, ageing from the bottom, differing time scales of demographic change and policy intervention, demographic resilience versus demographic reversal, and regional divergence within overarching long-term convergence.

These concepts, which are the object of mainstream demographic research risk passing unnoticed in political debates often exclusively centred on the contraposition between pursuing fertility targets and migration.

The paper makes two main scientific contributions: providing a mapping of more recent policy development in the EU and showing how demographic evidence and research is already informing various EU policies.

In terms of policy contribution, this paper aims to support, through an analytical lens, the mainstreaming of demographic considerations in EU policies.