



Central European
Labour Studies
Institute

Bargaining for working conditions and social rights of migrant workers in Central and Eastern European countries (BARMIG)



Comparative Report

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CELSI Research Report No. 53

August 2022

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This report was financed
by European Commission Grant
No. VS/2020/0119

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Table of contents



| | |
|---|----|
| Introduction | 1 |
| Chapter 1. Regulatory environment | 4 |
| Chapter 2. What data and research say | 8 |
| 2.1. Data availability and local state-of-the-art research | 8 |
| 2.2. Main findings: assessment based on administrative data | 9 |
| 2.3. Employment patterns and forms | 11 |
| Chapter 3. Migrant workers in CEE media | 14 |
| Chapter 4. Social dialogue and collective bargaining | 16 |
| 4.1. Industrial relations and social dialogue: general institutional characteristics and findings | 16 |
| 4.2. Strategies and engagement of social partners – national and sectoral comparison | 18 |
| Chapter 5. Sectoral analysis | 22 |
| 5.1. Platform economy | 22 |
| 5.2. Construction | 24 |
| 5.3. Automotives | 25 |
| 5.4. Services | 26 |
| 5.5. Health care | 29 |
| Conclusions | 36 |
| References | 40 |
| Appendix / Interviews | 41 |

Introduction



Since 2016 the former socialist EU Member States have experienced acute labour shortages, especially due to the outmigration of workers to labour markets in western EU states, but also due to demographic factors. The resulting labour shortage has increasingly been compensated for by employing migrant workers from neighbouring non-EU countries, especially from Serbia and Ukraine. The BARMIG project's original logframe was defined in 2019 to analyse developments in industrial relations in the six Central and Eastern European (CEE) states in order to address challenges and opportunities for trade unions and employer organisations stemming from the above-mentioned labour market developments. Due to the Covid-19 pandemic and the subsequent crisis, the plan of the project was modified also in order to incorporate the impact of Covid-19 on the labour markets in general, and more particularly its effect on the employment of migrant workers, along with reactions from social partners. The research analysed developments in the period between January 2016 and December 2021. The BARMIG project thus could not deal with the entirely new situation stemming from the Russian aggression on Ukraine and the war which also affects production, labour markets and employment of migrant workers in Central and Eastern Europe. Nevertheless, the final output of the project, the conference in April 2022, with the participation of social partner organisations and renowned experts, also shed light on problems of migrant workers from Ukraine and Russia after February 2022.

The basis of the comparative report are six national reports, covering developments in Croatia (Butković, Samardžija, and Rukavina 2022), Czechia (Martiškova and Šumichrast 2022), Estonia (Masso, Roosaar, and Karma 2021), Hungary (Meszmann 2022), Poland (Polkowska et al 2022) and Slovakia (ZEPSR 2022). These reports assessed constraints, opportunities and challenges for industrial-relations actors, which stem from the increased presence of migrant workers in four traditional sectors – health care, construction, hospitality and retail services, and metal manufacturing, as well as services provided as part of the digitised economy (i.e. platform work). The national reports also analysed how, and with what capacities, trade unions and employer organisations in the six countries responded to these changes and challenges in general, and more particularly how collective bargaining and social dialogue tackled the issue of migrant workers. The labour-market integration of migrant workers from the countries neighbouring the EU – especially Ukraine and Serbia – was of particular concern to the research. The national reports mapped opportunities for

trade unions and employer organisations to influence policy in the areas of migration, protection and representation of migrant workers' interests, fair employment, equal rights and integration of migrant workers, also through collective bargaining.

The reports were based on certain quantitative and qualitative data. The research teams combined desk research and data collection with interviews. A review of secondary literature informed the research and main background analysed thereafter. To shed more light on the public reception of increased migrant workers' presence, in all the six countries we also gathered and analysed relevant articles from the most popular online media. In total, 110 interviews were conducted with trade union representatives, employer organisation representatives, experts, civil society and worker activists, as well as with representatives of official organisations and institutions. The Appendix contains the list of interviews, including country, stakeholder type and sector specifications, as well as the interview questions for semi-structured interviews. The reports also took into account information from background reports and presentations on Serbia and Ukraine as countries of origin of migrant workers in focus. The media analysis was conducted in 6 languages and it applied a mixed method approach. The main method used was a three-step mixed approach (quantitative and qualitative) that was designed to reconstruct topics hidden in newspaper articles.

In this spirit and background, the comparative report provides a comparative analysis through which we can see the differences and similarities in the development of social partners' reactions to the increased presence and employment of migrant workers in CEE. We use double comparison, applying both cross-national and cross-sectoral perspectives. The comparative report also includes an additional exogenous element: research also shed light on what impact the Covid-19 crisis, as an unfolding phenomenon, had on employment and labour market integration of migrant workers. The comparative report builds on sections of national reports: besides collecting relevant statistical data and information about the institutional environment, national reports also analysed the regulations on third country nationals' employment, including labour market integration of migrant workers. The comparative report thus first provides an overview of the changes in the regulatory environment related to employment of third country migrant workers. Here in Chapter 1, we compare regulations on migrant workers in 6 CEE countries, and then show the recent changes in regulations. Chapter 2 documents trends and data quality and availability related to employment – mostly the number of the employed and forms of employment – of “third/country” migrant workers. Chapter 3 compares media coverage of the topic of migrant workers in CEE (“public environment”) and Chapter 4 outlines similarities and differences in social dialogue and collective bargaining (“institutional environment”). Whereas the first four chapters apply a cross-national perspective, the longest Chapter 5 provides

a sectoral comparison. Here we concentrate more on comparison of trade union and employer engagement with migrant labour, indicating also obstacles to labour market integration of migrant workers. We spell out concrete best practices either in terms of collective bargaining or social partner attempts to integrate migrant workers onto the labour market, which we hope could pave the way for better outcomes for all parties involved. The final part of the report is for conclusions, where we summarise main findings but also recommendations of the national reports.

Chapter 1. / Regulatory environment

Regulations on employment of third country nationals outlined a specific pattern of employment of migrant workers but also contributed to their rather shallow, instrumental labour market integration. As a main rule, regulations on third country nationals' employment are restrictive in all the countries. The general rule is that third country citizens could establish an employment relationship only after a work permit had been issued by relevant bodies. There is a quota system or a rather lengthy labour market test in place. A strict quota system is in place in Estonia, and until 2021 there was a flexible quota system in Croatia. In contrast, there is a labour market test system in Czechia, Poland, Hungary, Slovakia, and in Croatia since January 2021. Compared to the quota system, the labour market test system causes excessive bureaucratic procedures and reporting, which makes employment of migrant workers very slow and practically problematic for employers. Strict legal regulations on labour migration induce marginalisation and vulnerability of migrant workers. In addition, at least in some cases, as in Hungary, or under new circumstances, as during the Covid-19 crisis in Slovakia, migration becomes a highly politicised, sensitive topic, and goes hand-in-hand with an untransparent migration policy. Most alarmingly, as in Hungary, the government treats migration as a marginal issue, mostly as a policing and security issue, and from the EU law perspective, views it as a task that entails legal-harmonisation requirements (Tóth 2013, 249).

Under the conditions of acute labour shortages such rigid regulations in most cases became “diluted” with an increasing number of exceptions, which goes against the spirit of the strict rule. Poland is the country that liberalised its labour market the most via introducing various visa types to third country nationals. However, employment of migrant workers concentrates on seasonal, short-term and temporary employment schemes. Furthermore, in Poland seasonal work permits were introduced from 1 January 2018, where an employer applies to the competent head

of the district. In Estonia the reference period for “seasonal” employment became increasingly prolonged. Since 2017, in Estonia TCN migrant workers could work up to 365 days within a period of 455 days or, in the case of seasonal work, 270 days within 365 days (!). This is a tremendous development if we take into account that until 2016 the maximum duration of short-term employment was 6 months. Finally, the Covid-19 crisis entitled the government to introduce “short term employment” for foreign nationals to a maximum of 730 days within 913 consecutive days (Masso et al 2021). In Hungary, besides allowing TCN workers from some countries to be employed seasonally, for up to 90 days without a work permit, several precarious employment forms are also open for TCN migrant workers, most notoriously, the public work employment.

In Estonia, special regulations allow international students to work during their studies, and after graduation they have nine months to look for a job. International students are part-time workers during their study in Hungary, where decrees and amendments to legislation made large-scale exceptions available and accommodated seasonal employment to workers coming from Ukraine and Serbia, but the list of eligible countries has been significantly extended, last time in autumn 2021. In Czechia, third country nationals can obtain a short-term visa for employment for up to 90 days within 180 days. Finally, special government programs were introduced in some countries, especially in Poland and Czechia, directed at employment of specific professions of migrant workers from targeted countries.

Poland and Czechia seem to have liberalised the entry to their labour markets the fastest, but in different ways. In Czechia, the government first launched a program to attract highly skilled specialists from some countries (IT specialists from Ukraine and India) and in 2016 “Regime Ukraine” program was also adopted to attract medium skilled workers, while in 2018 a programme was developed to attract agricultural workers from Ukraine. In Czechia these programmes gradually became the dominant instruments of migration policy for TCN workers. The “Poland. Business Harbor” programme targets all Belarusian citizens, skilled workers and companies. Poland introduced several types of visas that enabled many workers, especially from Ukraine, to enter its labour market, but also other EU labour markets via posting. Other countries also increasingly introduce exception regimes. In Estonia, TCN migrant workers with temporary residence permits are permitted to work as agency workers (Masso et al 2021), and student workers are not only present in the labour market, but their integration is also encouraged. In Hungary, employers who concluded strategic partnership agreements with the government could employ TCN workers directly; among them there are also increasing numbers of temporary work agencies. Students in some CEE countries are entitled to work without a work per-

mit part-time and full-time for two months. Student work or work via student co-operatives are especially widespread in some countries, particularly in Estonia and Hungary.

The role of intermediaries has increased in all the countries. In Hungary third country nationals got increasing access to employment via temporary work agencies, as these intermediaries received more and more rights to employ third country nationals. In Slovakia amendments to the rigid regulations were introduced only in 2018, which resulted in employment for seasonal 3- month periods and large-scale illegal employment. Finally, as most national reports also indicate, a substantial part of migrant workers work in the informal economy, or less regulated sectors, such as agriculture, domestic work, or the platform economy, with minimal or no social protection.

In “regulated” sectors, employment of migrant workers in Estonia and Czechia is subject to the requirement that the national average gross salary is paid (Estonia) or higher wages are paid than for locals (Czechia). In Czechia a renewed programme of the minimum wage for foreigners was introduced: for highly qualified employees, the minimum wage is at the level of the average wage for highly qualified employees in the country, for medium qualified jobs in construction and industry, the minimum wage for migrant workers is set at 1.2 of the statutory minimum wage. These are the only two countries that attempt to protect wage levels in their labour markets. However, in these two countries posting of third country nationals based typically on Polish visas was reportedly significant. In these configurations, posting works against attempts to protect wage levels. Especially posted workers from Ukraine on the Czech or Estonian labour market had precarious, low-paid and dangerous jobs, exposed not only to exploitation but also to health hazards at work. Thus, both Estonia and Czechia are affected by the liberal migration policies of neighbouring Poland, which creates a grey zone for false and illegal posting of migrant workers from Ukraine.

In all the countries there is a lack of policies that would facilitate or pave the way to the integration of migrant workers and their families into the CEE labour markets and societies. Migrant workers without residence permits could not enjoy social security but would be holders of private insurance. During the first waves of the Covid-19 crisis these workers also quickly lost their jobs. Most alarmingly, sometimes infected workers were requested to go back to their home country. Instead of integration measures, policing of migrant workers was pronounced in some, if not most of the studied countries (at least the Visegrad 4). (See e.g. the 2015 Strategy of Migration Policy of Czechia). A telling indicator of limited or sporadic integration

infrastructure is the lack of language courses which are typically limited in most countries to asylum seekers and refugees. Civil society organisations in most countries attempted to fill this massive gap.

The national reports have also found the existence of traditionally present or more entrenched migrant workers in these labour markets (Hungarian-speakers from most countries neighbouring Hungary, ethnic Slovaks in Slovakia, Ukrainians in Poland, migrant workers from former Yugoslav republics in Croatia, Slovaks in Czechia, and arguably Russian-speakers in Estonia), whose integration did not necessitate a more significant infrastructure and was less costly. This default entrenched configuration is now insufficient in the case of migrant workers arriving from more distant, culturally very different places.

Chapter 2. / What data and research say

2.1. Data availability and local state-of-the-art research

There are significant differences in availability and quality of data and up-to date research on migrants. Data from the Labour Force Surveys and from the previous national census (2011) were in most cases not appropriate to assess changes in migrant workers' presence in labour markets of the 6 Central Eastern European countries. The reports thus relied heavily on administrative data, as a proxy for migrant workers' labour market presence. Administrative data were used to assess changes, as both stock and flow data. In Estonia, the quality of statistical data was good, and enabled also e.g. wage estimates of recent migrants. In most cases, data could be disaggregated annually, by visa or permit types, sectoral composition of migrant workers, and country of origin. In some cases, as in Slovakia, cases of illegal employment were also recorded. Even for Estonia it was noted that data sets underestimated the actual presence of migrant workers in the labour market. On the other hand, as it was noted in the case of Hungary, administrative data for seasonal employment did not reveal whether the same person was registered for a seasonal permit more than once during one year.

Labour market research on migrant workers seems to have been the most advanced in Poland: several up-to-date studies have been conducted, related to the presence and integration of migrant workers. In Estonia, there are many relevant quantitative studies that take note and monitor changes in the labour markets. In contrast, in the other countries in recent years research on migrant workers was conducted typically only by non-governmental organisations or international organisations. In the case of Croatia, Czechia and Hungary there are no recent large-scale research projects, and representative studies were also extremely rare after 2013. Thus, estimates and assessments were still based on earlier research.

2.2. Main findings: assessment based on administrative data

Administrative data in all the countries indicated a massive increase in work permits issued or third country migrant workers registered since 2015. The peak year for most countries was 2019. Judging from the number of residence permits issued and registration, compared to 2015 as the base year, in all the countries the number of third country migrant workers multiplied manifold. It more than doubled in Slovakia, and multiplied by six times in Poland. The Covid-19 crisis impacted on migrant workers presence, however, not equally in all the countries. In Slovakia, the increase in the number of registered migrant workers slowed down, whereas there was a more abrupt change detected in Hungary and Estonia. In Slovakia, immediately at the beginning of the crisis, the government adopted restrictive measures: the authorities significantly limited the issuance of employment permits, as a result of which the arrival of foreign workers was reduced. In Poland and Czechia, the inflow also slowed down but only temporarily: in autumn 2020 the numbers reached the pre-Covid levels.

In all the countries, until 2020, the majority or a huge cohort of migrant workers arrived from Ukraine (Poland, Czechia, Estonia), but Serbia (most significantly in Slovakia), Bosnia (in Croatia), Russia (Czechia, Estonia, Slovakia) and, more recently, Belarus (Poland) also featured. Ukrainian migrants were prevalent in Poland, Czechia and Estonia. The most significant number of Serbian migrants was recorded in Czechia, while the highest number of Bosnian migrants in Croatia. Most Russian migrants were recorded in Czechia, Estonia and Slovakia, while Belarusian migrants were present in Poland. In the last years, and also after the first waves of the Covid-19 crisis, the numbers of migrant workers from non-European, especially from Asian or African countries, increased significantly.

A more recent trend, characteristic since 2018, was also the increase in seasonal employment forms. In Poland alone, a newly introduced (2019) seasonal visa constituted about a quarter of all employment visas. In Croatia, seasonal work quotas were also introduced. In Slovakia, a more recent development was registration for independent economic activity/“self-employment”, which enabled easier, but more shady economic activity in the labour market. In Estonia and in Czechia posted workers or workers with a Polish visa added to the numbers.

Among those registered and/or having work permits, migrant workers were employed typically in construction in all the countries, and also, in varying degrees due to specificities of national economies, in services, retail or tourism (less typically

in Slovakia) and in manufacturing (less typically in Croatia) related sectors, especially in logistics. Statistical data indicate that TCN migrant workers usually provide their labour in less regulated, low-wage sectors, where seasonal or temporary employment is also characteristic. Administrative data did not show significant presence of third country nationals in the health sector, and there was no official data for platform work. Altogether, migrant workers were employed in low-wage sectors and, with the partial exception of manufacturing, in sectors where less formal contracting was also present.

Table 1. Sectoral presence of TCN migrant workers in the six countries (assessment as at 2020)

| | platform “sector” personal transport – taxi | construction | retail and/or HCT | automotives (metal) | hospital inpatient care |
|-----------------|--|---|--|-------------------------------------|--|
| Czechia | high | very high – 27.6% (2020) | low/medium | 15.5%, uneven presence by companies | relatively low but increasing and concentrated at one or a few hospitals |
| Croatia | NA | very high – 32.6% (2020) | high (tourism), around 11% win 2020 | medium/low, increasing | low, less than 1%, but growing |
| Estonia | medium/high, the share of Russian speakers among platform workers is also higher than of Estonian speakers | ca 10% (medium/high) | low, uneven – significant in some sub-branches of services, in metropolitan area | 10-15% (engineering) | low but increasing, uneven – concentrated at some hospitals |
| Hungary | very low | medium – 5-6%, estimate based on inspection reports (2016-2019) | low but rising, uneven – concentrated at large retailers | NA, uneven | low but rising – uneven, more concentrated at some hospitals |
| Poland | estimated at 50% | high, ca 15% | low/medium (rising after Covid), uneven – concentrated at large companies | NA, uneven | low but increasing |
| Slovakia | NA | significant, no estimate available | low | NA, uneven | low/medium |

Table 1 summarises the main findings of the research in terms of migrant workers’ presence in various sectors, as a share of migrant workers among all employees. Table 1 shows that migrant workers are the least present in the most regulated la-

bour market of health care professionals, and the most present in the labour intensive, less regulated sectors. Migrant workers' presence is significant in construction everywhere, and varies greatly in services and platform work. In metal and automotives, but also hospitals and retailers, migrant workers' presence is uneven, concentrated at large companies or establishments. In addition, researchers highlight that migrant workers are also present in other, less regulated sectors with weak social dialogue and institutions of industrial relations, such as agriculture (e.g. in Estonia, Hungary) and in care, domestic work (Czechia, Poland), but also in platform work (Estonia, Poland, Czechia).

2.3. Employment patterns and forms

Overall, in the covered six countries, we can see that rigid employment regulations are in place with increasing tolerance for temporary and seasonal jobs for migrant workers. With such a background it is not surprising that in all the countries a pattern of cyclical migration was detected. This is the point with which we can associate the issue of shallow labour market integration as an interrelated macro phenomenon. Interviews with social partners and experts, as well as administrative data highlighted seasonal or temporary job contracting, with limited social security as typical in most sectors.

Table 2 presents the main findings in terms of characteristic employment forms, and attempts to indicate also whether migrant workers are employed in a given sector under worse conditions. We indicated in green good practices, where no significant differences occur between locals and TCN migrant workers with respect to contracting, in yellow where problems are visible, and in red the sectors where TCN migrant workers are employed typically under worse conditions than locals. As indicated in the Table, contracting had sectoral specificities in all the countries. Thus, in the personal transport segment of the platform economy, work via intermediary fleet companies was common in most countries, temporary agency work was common in automotives, minor and shady employment contracting was common in construction. In the service sector, in all the countries, contracting varied greatly depending on the size of the employer: in large companies, standard, fixed term or temporary agency work was used, in smaller entities informal employment or minor contracting was common.

In health care, in some countries, as in Czechia and Poland, migrant health care professionals worked as assistants under the supervision of local superiors, until necessary exams were passed. However, examinations were cancelled during Covid, assistantships remained, while many faced the actual situation of independent work (which was against regulations), but they were still paid as assistants. A specific difference was that in Estonia and Czechia posting also appeared in construction and metal manufacturing, and in Croatia temp agency work was less common than in other countries.

Temporary employment arrangements ranged from seasonal employment and cyclical fixed-term employment to employment via intermediaries, usually temporary work agencies. Except for health care, in all sectors, employment via temporary agency, marginal employment contracts or semi-legal civil contracts were used in employing migrant workers. It must be highlighted that these employment forms are widely used in the labour market; however, it seems that migrant workers are more commonly employed via these contracts than domestic and local workers. As it will be highlighted in the next section, for experts, social partners, and especially for trade unions this meant two issues: pressure on contracting standards (social dumping) and challenge for some sectors to become entirely migrant labour sectors.

Table 2 Characteristic employment forms of migrant workers, by countries and sectors

| | platform “sector” personal transport | construction | retail and/or HCT | automotives (metal) | hospital inpatient care |
|----------|--|--|---|---|--|
| Czechia | outsourced (fleet companies) | informal, seasonal contracting (outsourcing) | informal/self-employed | typical: temp agency work, not covered by CBAs, employment below standards due to cost pressure, via Polish visa and false agency work | standard employment contracts – low wage in public hospitals, work under supervision |
| Croatia* | semi-legal contracting via fleet companies | direct fixed-term or standard contracting, CBA coverage | high/fixed term contracting, informal contracting, but also standard with CBA | fixed term contracts, also via TWA, but same terms, permanent contracts possible and used! Part time work during Covid. Difficulties in enforcement/application | fixed term contracts, carers in ancillary jobs (work below qualifications) – while waiting for recognition and exams |
| Estonia* | temporary service work, student work | seasonal employment 9-12 months, TWA, posting, illegal –shady employment | seasonal employment, fixed term or via temp agency | posting from Poland via temp work agencies, fixed term (project) contracts; high turnover, high flexibility and workload | fixed term employment, probationary period |
| Hungary | semi-legal contracting via fleet companies | informal/seasonal work (outsourcing, subcontracting) | seasonal, informal/TWA | typical employment via temp agencies, extremely flexible work arrangements occur. Vulnerability / exposure to shocks – e.g. Covid | fixed term employment contracts, indirectly lower tariff categories |
| Poland | self-employed, contract of mandate/fleet companies, illegal | fixed term – 6 month, seasonal employment contracts | retail: permanent or temp agency contracts | temp agency work, 6 month fixed term contracts, transnational posting via temps; language barriers; permanent employment in OEMs and flexible employment in suppliers (via temps) | employment contracts (fixed term) vs. individually bargained contracts (physicians), nurses work for minimum wage |
| Slovakia | low, minor employment contracting, service “self-employment” contracting | service contracting/ outsourcing via “self-employed”, seasonal work | shady contracting common, not in large entities | full time, fixed term, seasonal contracting, also: use of TWA and (illegal) outsourcing, language barriers | due to problems with recognition of diplomas, mostly employed in ancillary occupations/jobs |

Chapter 3. / Migrant workers in CEE media

In order to assess the general discourse on the increased presence of migrant workers in the CEE labour markets, and to assess trade union and employer organisations' involvement in the media, research teams gathered and analysed articles from the most popular online media in the six countries, which were published between 1 January 2016 and 15 November 2020. The main method used was a three-step mixed approach (quantitative and qualitative) that was designed to reconstruct topics hidden in newspaper articles.

Data, in the form of newspaper articles, were collected from the selected most popular online journals and weeklies based on keyword search. In addition, the goal was to select and analyse ideologically diverse media (left, centre, right) in all the countries. Each team defined up to four keywords related to migrants' work which were then used as search terms in the article databases of selected media websites. Before the analysis, we removed stop words (e.g. prepositions and pronouns) from text corpora made of the collected articles. Such procedure was applied to all six languages present in the project: Croatian, Czech, Estonian, Hungarian, Slovak and Polish. After the initial content analysis, we looked deeper into the articles by conducting two analytical tests borrowed from natural language processing: (i) n-gram analysis (n items from a given sample of text) with network visualisation, (ii) topic modelling with the Latent Dirichlet Allocation (LDA), a generative algorithm designed to extract topics hidden in sample articles (Blei, Ng, Jordan 2003).

There were some common or similar issues identified in the articles collected in all the countries. Media analysis indicated that in all the countries migration was mentioned in relation to labour shortages. However, there were differences in the structure of shortages. Although this situation is relatively new in the CEE region, all countries – except Croatia – have deep structural problems which result in permanent shortages of labour resources. Croatia, due to the economy that relies heavily on tourism, has suffered mainly from seasonal labour shortages so far. Interestingly, an analysis of the Hungarian media showed that the problem of labour market shortages was associated with unskilled workers (*szakképzetlen*). In Slovakia the

headlines reflected on the reduction in the number of employed migrants but at the same time continued to report on the labour shortage in the Slovak market and the displacement of the migrant labour force further into the future.

According to the media, workers from Ukraine – “Ukrainians” – are the most frequently mentioned nationals who supply the Central and Eastern European labour markets. The Polish media also frequently mentioned Belarusians as migrants who filled gaps in the domestic labour market. Surprisingly, no other nation was mentioned that frequently in media articles as Ukrainians and Belarusians. In Czechia, migration was frequently connected with illegality: “What seems to be important is that the most frequent bigrams referred to the issue of “commuting” and “expelling” Ukrainians, thus referring to the recurring short-term migration and illegal work, which are the main characteristics of Ukrainian migrant work in Czechia” (Martišková and Šumichrast 2022: 23)

The topic associated with migrant workers that appeared in all the national media titles was the COVID-19 pandemic. For example, in Poland the media discussed issues related to work permits, and Warsaw appeared to be a city particularly dependent on migrant labour. In Croatia, the media frequently reported that employers in the tourism sector were highly dependent on foreign workers. The Croatian government’s work on the new Aliens Act was also in the spotlight. The need to increase quotas for foreign labour or to remove quotas entirely from the Aliens Act was the topic of many articles in Estonia. Moreover, the Estonian press emphasised that agriculture cannot survive without migrants. Hungarian press suggested that the issue of migrant workers was highly politicised, as the key political figures were frequently associated with this topic. The LDA analysis also produced a great variety of country-specific topics.

Chapter 4. / Social dialogue and collective bargaining

4.1. Industrial relations and social dialogue: general institutional characteristics and findings

National level forums for social dialogue exist, but have a modest role in all the six countries. Particularly, their role in discussing employment and integration of migrant workers in the local labour markets was rather symbolic. Collective bargaining coverage varied both across sectors and among countries.

Estonia is among the countries with a more liberal social model, meaning also fewer channels and less significance of social dialogue, which traditionally has low competence/representativeness for both parties and limited resources. Nevertheless, the role of social partners has increased after the financial crisis, there are regular consultations over legislation and meetings with the prime minister, and capacities have grown due to higher EU structural funds. Tripartite talks have been restored since 2018, but their operation and role is highly dependent on governing coalitions (Masso, Themás, Aksen 2019). A diametrically different situation occurs in Poland and Hungary where national level forums for social dialogue were relatively important, but their role deteriorated significantly in the last decade or more recently, as in Poland. In both countries social dialogue has been restored rather abruptly, and new institutions of social dialogue do not perform a major role, but increasingly symbolic, sometimes politicised. At the sectoral level, in Hungary sectoral social dialogue committees exist, but mostly only symbolically as they do not receive funding for operation. Only in Czechia, Croatia, and Slovakia social dialogue forums are relatively stable. However, in Slovakia the role of social dialogue and especially its influence over legislation have deteriorated in the last 5-10 years. There are two, frequently used instruments that enable direct bypassing of the national social dialogue forum: MPs can submit bills directly, and legislative stages are possible after consultations at the social dialogue forum.

In Poland, and especially in Slovakia, there are currently ongoing national projects that aim to increase capacities of social partners, also in terms of dealing with labour migration. In Croatia, consultations over relevant legislation were regular. However, the role of the Economic and Social Council has weakened in the last ten years and the Council was not active at all during 2020. after the 2008 crisis but regained some of its former importance in the aftermath of the Covid-19 pandemic. Finally, in Czechia the national level social dialogue concerns both legislation and economic issues, and especially trade unions value its existence highly.

Collective bargaining in all the countries is mostly decentralised to company and establishment levels, and in some countries the sectoral level also has a certain role. Sectoral bargaining occurs in Croatia, Slovakia and Czechia, but sporadically it happens also in Hungary and Estonia in some sectors: health in Estonia, construction and tourism in Hungary, but with a very narrow agenda. Bargaining coverage varies and is the highest in Croatia, followed by modest coverage rates in Czechia, Slovakia and Hungary, while the lowest ones are in Estonia and Poland. In all the countries trade unions struggled with deteriorating membership and acted with low or decreasing organisational capacities, but employer organisations in most cases also reported modest capacities. The issue of foreign worker employment featured sporadically during collective bargaining at some companies, but nowhere as a central issue.

Between 2016 and 2021 the issue of worker migration appeared during meetings of social partners, and in most cases was related to changes in the regulations. In Estonia, employers suggested to increase and loosen the very strict migration quota (Masso et al., 2018), and more recently also have posited that the current quota system is outdated and have pointed out that the widespread use of temporary labour is an emergency solution. (Masso et al 2021). In Hungary, since 2016, at the main national level forum for social dialogue, the issue of migrant work has appeared twice, but not as a separate point. First, it was discussed as a point related to labour shortage management, while on the second occasion it was related to regulatory changes that facilitated easier employment of third country nationals. Whereas employer organisations initiated the process, the government drafted the regulation and the trade unions assumed a reactive role. Here, social partners were not involved in consultations about changes in the regulation. Whereas employer organisations' suggestions mattered in the sense of initiating the process, union confederation activity consisted in public reactions to legislative and regulatory changes introduced by the government. (Meszmann 2022: 42).

In Croatia, social partners discussed thoroughly and were involved in drafting of the new Aliens Act. On the other hand, the issue of migrant work was not dis-

cussed as a separate topic in social dialogue forums at national or sectoral levels (Butkovic et al 2022: 6). In Poland, in 2018, within the working group for the reform of the labour market policy of the tripartite body, there was an analysis of needs of the Polish labour market in terms of employment of foreigners and discussion of possible amendments to relevant regulation. The body also agreed to monitor the effects of the introduced amendments and to prepare guidelines for a long-term migration policy. However, in the following years, the issues related to the employment of foreigners were no longer discussed. (Polkowska et al 2022: 27). In Slovakia, positions are similar, but dialogue is more intense. Employers' representatives take positions mainly on procedural matters concerning residence and work permits, whereas union representatives are more concerned with the social aspect of the employment of third country nationals and stress the need for companies to give preference to the employment of domestic workers. In 2018 employers exerted pressure to change the legislative conditions, unions agreed to liberalisation measures and to amendments to the legislation (ZEP 2022). Czechia is probably the most positive example, as the topic of labour migration is addressed at the level of tripartite work teams. In particular, there is a working group for employing migrant workers, which follows the issue. In March 2020, at a meeting of the working group, "Ten Points for Employers Employing Foreigners in Times of Emergency" were agreed upon, setting out the principles of action towards migrant workers employed in Czechia. Both employers and trade unions agreed to prevent misuse of the fragile situation of foreigners during the pandemic-related emergency. (Martišková and Šumichrast 2022: 25-26)

4.2. Strategies and engagement of social partners — national and sectoral comparison

The following two tables, Table 3 and Table 4 summarise capacities and main strategies of social partners related to employment and labour market integration of migrant workers in six countries and in five sectors studied.

Table 3. shows that the platform economy is beyond capacities and engagement of employer organisations, also since the platform driven economy is not sufficiently regulated in any of the countries. Red indicates no strategy, yellow instrumental approach, and green real engagement. In other sectors, employer organisations or individual employers attempted to find good solutions also for migrant workers, in varying degrees. Positive cases include: employer practices and initiatives in the Hungarian tourism (individual employers), in the construction industry: sectoral contracting practices in Croatia and initiatives in Slovakia, and contracting practices

in the Croatian metal sector. In the health sector in Poland and Czechia there also seem to be good initiatives on an individual establishment level. In most sectors and countries, employers take an instrumental approach, focusing on rather swift ways to address short-term labour needs, without thinking about long-term accommodating solutions.

As shown in Table 4, in some sectors there are no employee representatives at all: this is the case in the platform sector, but also there is no trade union in the construction sector in Estonia. Except for the positive case of Croatia, where trade unions in the construction sector are open to organise migrant workers and insist on sector level collective bargaining, but also engage in transnational cooperation actions with other trade unions, in other countries in the construction sector union capacities are acutely weak, and they attempt at best to exert influence over legislation via national level union confederations. In the selected service sectors, unions reached out to migrant workers typically only at large retailers, and attempted to unionise them. Health care and automotives were similar in the sense that unions in both sectors in all the countries had a default strategy of representing all the employed, and migrant workers were not excluded. However, whereas unions were open to migrant workers, there were no specific services developed for them. Positive cases were recorded in Czech automotives and in Estonian health care. In Czech automotives, besides being open to migrants, unions distributed information leaflets in native languages of migrant workers. In Estonian health care, unions were in favour of language courses for migrants, and increased their involvement in social dialogue.

Table 3. Engagement of employers (capacities and existing strategies toward LM integration)

| | platform “sector” personal transport | construction | retail and/or HCT | automotives (metal) | health hospital care |
|----------|---|--|---|--|--|
| Czechia | Acknowledge state authorities action against illegal employment via agency/ fleet companies) | low-concentrated at large employers. | Low. No clear strategy. | medium. solving labour shortages also via reliance on TWAs and subcontractors. | low-medium? public vs. private. In public: standard employment but outsourcing of non-medical services (cleaning – more migrants) |
| Croatia | NA. fleet companies escape regulation, shady contracting | medium-high. open ended employment contracts for migrants, prevention of abuse of work licences by fictitious agencies | Low-medium. Default: no special attention paid to migrants | Medium. Securing migrant labour via open ended contracts, regulation via company level agreements (covering all) | low/medium? (yes) need for migrant workers recognized, also for intermediaries – employment agencies, but high screening standards |
| Estonia | NA-Low. no specific strategy. availability of information in English | no specific strategies, beyond increasing labour supply, preferring more legality. | Low. Insisting on legal employment. | Metal: moderate. Lobbying for increase of the migrant labour pool | Medium. Considerations and debates to reformulate entry requirements for migrant professionals, with state involvement. |
| Hungary | NA. Fleet companies escape regulation, shady contracting | medium. more flexible regulation/administration, securing labour via various means, less concern about integration | Medium/low. HCT: more flexible regulation, advertising good solutions, special procedure developed for special groups | medium/low – decentralised. Default reliance on TWAs, direct employment possible for strategic partners. | Low/medium. Establishment based, NA |
| Poland | Low-non existent (platform company part of employer association, fleet companies escape regulation) | Medium. Modifying regulation: excessive bureaucracy, inappropriateness | Low. (Decentralised). No special employer strategy, reliance on TWA. | Low. Reliance on temp agencies | Medium. Problems due to (laxing) professional requirements and filling acute shortages. |
| Slovakia | NA. Platform companies part of employer association | targeting regulation via umbrella employer organisation, CBAs, targeting unfair competition/ complex policy | Low/medium. Temporary, shady employment, illegal employment (wo permits). | medium-high. more flexible regulation, consultations, warnings about unfair competition | Laxing strict regulation, also for nostrification of diplomas. |

Table 4. Union strategies and initiatives

| | platform “sector” | construction | retail and or HCT | automotives (metal) | hospital inpatient care |
|----------|---|---|---|--|---|
| Czechia | informal online groups of workers, but few migrants | influence over legislation via national confederation | no strategy/recorded initiative | workplace level unionisation, info sharing-leaflets and indirect influence over legislation, limiting TWA | Default strategy. No differentiated treatment recorded |
| Croatia | union established for platform workers | open unionisation, ensuring same rights via CBAs on two levels | unionisation-rare, inclusion in CBA covered workplaces, no special attention paid to migrants | workplace level unionisation, coverage by CBAs, tackling migrant work via addressing fake TWA | default strategy of inclusive representation, also via international cooperation |
| Estonia | no strategies or interests on behalf of unions, no self-organisation recorded | Absence of a trade union! | Addressing social dumping, health and safety enforcement. No members in the union. | Metal: not addressing migrant workers, also due to failed attempts at unionisation. Following the situation on company levels. | Initiative: Language courses provided by the state to qualified migrant workers, increase of specialised social dialogue. |
| Hungary | info exchange, internet forum | no strategy due to claimed low numbers | unions limited to large units. sporadic attempts of unionisation and info exchange | sporadic workplace level unionisation, membership based services, tackling migrant work and temp work simultaneously | Default strategy, representing all workers |
| Poland | drivers union negative stance towards unregulated platforms, no self-organisation initiatives | no clear strategy and expressed interest | default strategy – representing all workers. Migrants also union members, but only at large units | tackling migrant work and temp work simultaneously. workplace level unionisation, membership based services | default strategy – representing all workers. Little interest, due to conviction of equal treatment |
| Slovakia | no self-organisation and union initiatives | difficulties in addressing precarious migrant workers, cooperation with employers to fight unfair competition | Unions active in large retailers only, CBAs don't cover migrant workers | limiting migrant work, equal employment conditions for all – at unionised workplaces | Default strategy, representing all workers, improving working conditions. |

Chapter 5. / Sectoral analysis

In this chapter we compare migrant workers' employment forms and associated problems (working conditions, social rights), as well as sectoral social partners' capacities and strategies in addressing employment and labour market integration of migrant workers, via social dialogue or collective bargaining. The interviewed social partners reflected on general and autonomous regulation, i.e. collective bargaining agreements. Throughout the project we analysed 5 sectors of the economy, 4 traditional and one new – the so-called platform economy, within which we concentrated mostly on personal transport (taxi or intercity). Among traditional sectors, construction, automotives (metal manufacturing), services (retail and/or HCT), and inpatient, hospital-based health care were in focus. The five sections of this chapter cover these five sectors.

5.1. Platform economy

In the platform economy there are no trade unions representing workers. With few exceptions, as in Slovakia and Poland, platforms do not consider themselves employers, either. As summarised in Table 5, employment forms available to migrant workers are highly precarious, ranging from minor employment contracts (2 or 4 hours, but actually working 12 or more hours) to small entrepreneurs, “self-employed”.

Regulation in terms of getting a job is easy in most cases, which explains that in most countries migrant workers are present in the platform driven sector. However, such easy access goes along with precarious arrangements for those employed in the sector. Employers, either registered platform companies or intermediary fleet companies, seem to design their strategies without much concern about social rights of workers, but in terms of creating a flexible business strategy. On the other hand, there are at best “proxy” trade unions present, such as traditional cab driver unions, which typically consider platform driven personal transport to be a threat to working conditions and, to a lesser extent, income. Typically, platform workers are at best clandestinely organised in online groups, for information sharing. Migrant workers, as a subgroup, are invisible in many cases, and their increased fragility on the labour market does not come to the fore. Activist initiatives, as in the case of Croatia, seem to bring to the fore their specific problems.

Table 5. Platform driven personal transport: Employment forms, regulation and engagement of trade unions and employers

| | employment forms and problems | regulation | strategies of employers | capacities and strategies of unions |
|----------|---|---|---|--|
| Czechia | Illegal work, under false accounts: Czech account but migrant worker uses it, work via Polish visas and Polish temp agencies (for locals: work transfer arrangements, can be supervised by inspectors). | Easy access for drivers, low threshold to enter the market. If inspectors come to a driver who does not have papers in order, they call the police to deal with the case further. | Fleet companies – illegal agencies as lucrative business: beyond the scope of labour inspectorates. | No attempt from the union side to organise platform workers. |
| Croatia | Minor / shady/ part time employment contract for 2-4 hours, for actually 12+ hours. | Platform work is poorly regulated. Better regulation is expected in 2023 with the new Labour Law coming into force. | Some fleet companies specialise in attracting, recruiting and employing migrant workers. | Croatian Digital Platform Workers union exists, but platform drivers are insufficiently organised. |
| Estonia | Short term gig (high turnover), service providers based on registration for tax obligations, difficult working conditions, critical health and safety issues. | Minimal requirements to become a driver/Bolt partner. Students entitled to work, as well as those with residence permits – e.g. their family members (no work permit needed). | Rely on international students work: no limitation of their employment via platforms, no special staff for migrant workers. | No trade union or association of platform workers. The confederation of trade unions does not see its role in representing platform workers in general, let alone migrant workers. |
| Hungary | Marginal employment contract with fleet companies or shady arrangement/illegal work, drivers are incentivised to cheat. | Low threshold for drivers employed via fleets, high threshold for entrepreneurs. | Platform companies increased the labour pool via decreasing the threshold, and introduced cheaper service via tech innovation. | No trade union or association. Minimal communication in online communities. |
| Poland | Minor “shady” civil law contract with fleet organising companies, work on the fringes of the law. | Online platform company Uber – registered as employer, but actual employers are fleet companies. | Fleet companies employ also workers who speak Ukrainian to attract/recruit migrant workers as drivers. | No union of platform workers. |
| Slovakia | Small entrepreneurs (rarely), marginal employment via a fleet company, service contract/agreement, illegal employment common. | Entrepreneurship needed (taxi license) or employment via a fleet company. | Employers – fleet companies take advantage of current legislative situation and use all possibilities to recruit workers. Uber is a member of an employer organisation, but not formally employing. | No organisation of platform workers. |

5.2. Construction

In the construction sector, the interviewed social partners and experts focused their evaluation on the general regulatory environment, highlighting problems and issues related to its implementation, i.e. enforcement of local labour standards in the case of migrant workers. In Estonia and Czechia, transnational posting of migrant workers was especially difficult to monitor, which was the key obstacle to enforcing labour standards and eliminating unfair competition. In both countries, either provisions of a sectoral collective agreement could not be applied, or provisions on wages in the case of migrant workers (Estonia). In Hungary, Poland and Slovakia, migrant workers were employed on the basis of labour cost-saving minor employment forms, and shady or even illegal contracting occurred. In contrast, especially to Czechia and Croatia, trade unions did not have the capacity for engagement with the issue. In these three countries, a high proportion of local workers were also outside of the scope of collective agreements and their enforcement. Table 6 summarises the main comparative findings.

Employer organisations were mostly concerned about securing labour and avoiding bottlenecks due to long administration proceedings. In most countries, newly introduced seasonal employment forms came into being partly due to the lobbying activity of employer organisations. For trade unions, at least in those countries where trade unions existed (i.e. except Estonia), the minimum standpoint was to insist on compliance with the existing minimal conditions of employment, and health and safety standards in particular, as in Slovakia. Unions were also concerned because of illegal employment and called for increased control and inspection.

Challenges and best practices

There are good practices, recorded in four countries.

In Estonia an NGO has managed to reach out to migrant workers and convince them to bring their problems to the labour inspectorate. In Slovakia, both the employers and trade unions are engaged to find solutions for migrant workers via social dialogue, as equal conditions for domestic and foreign workers are being discussed. Both partners are aware that the cost of employment of migrants is more expensive (if legal) or cheaper (if illegal).

In Croatia, social partners are involved in finding good jobs also for migrant workers. The union has migrant workers among members and plans information sharing actions. The union has experience with Croatian emigrant or posted workers, via cooperation with the union in Sweden, the experience of which is transposed to migrant workers employed in Croatia. It concludes collective bargaining agreements

also for posted workers. Moreover, employers take steps to integrate foreigners into the workplace collective, but also into the local society at large, via organising language courses, training etc. In Czechia, trade unions formulated measures to fight social dumping, collaborated with inspectorates against illegal employment, and supported the employment of foreigners for higher wages than for domestic workers.

5.3. Automotives

In all the countries studied, labour shortage was reported in the sector (in Estonia and Croatia in all the metal sector), which was increasingly affecting skilled professions. In addition, the prestige of work in the automotive industry was decreasing in many countries, which further aggravated labour shortages. A more volatile business environment also contributed to the increased use of precarious employment in the sector. A typical employer strategy was lobbying the government to amend legislation on employment of migrant workers and thus increase the available labour pool, as well as instrumental reliance on intermediary employers, temp agencies or posting to remedy acute shortages.

Except for Croatia, where fixed term contracting was more common, employment of migrant workers via temp agencies was characteristic of the sector. In Estonia and in Czechia, posting of workers was also reported as a cost-reducing strategy. In all the countries, migrant worker presence was significant but uneven, as migrant workers were employed in some plants more commonly, and less in others. Only in a few cases there are actual estimates of migrant worker presence, as in Czechia (15%) and Estonia (10-15%). (See Table 1 and Table 2).

Table 7 summarises the main findings in terms of general and autonomous regulation, as well as unions and employers' engagement with the issue. For trade unions, high turnover of migrant workers, as well as a short-term, income maximizing strategy of migrant workers represented a major challenge in creating their own strategy. Most unions were open to unionise migrant workers, but there were no capacities developed to deal with migrant worker problems, or offer specialised services.

Challenges and best practices

In Hungary some migrant workers are also union members. A major challenge for unions is the anti-migration (xenophobic) atmosphere, which hampers integration of migrant workers. Social costs and needs of local communities are not discussed. Similarly, in Slovakia a strategic document with specific measures in the field of migration and integration was prepared, but no specific integration measures were implemented for migrant workers.

In Czechia, integration centres were opened in 13 towns that had a large migrant worker presence. Policing measures were more problematic in these integration centres. Some employers offered integration courses, but expert critics highlighted the increased dependence of migrants on employers stemming from this institutionalised practice. Migrant workers are partly unionised at large companies. A major challenge, especially for unions, was migrant workers' concentrated presence in particular regions and towns.

In Croatia, at the request of an employer organisation, the Ministry of Interior allowed standard permanent employment contracts for migrant workers with one-year residence permits. The employer association petitioned the government to agree to the issuance of open-ended contracts for certain profiles of migrant workers in high demand. Employers tabled a recommendation to have regular language courses at intervals of 3 and 6 months for migrant workers. (Butkovic et al 2022) The sectoral trade union established international cooperation with unions from the sending countries but also EU countries where Croatian workers emigrate, which informs its strategies and increases capacities. The Croatian trade union is open to migrant workers from all countries.

5.4. Services

As it has already been presented at Table 1, there is a huge variation among CEE countries in terms of migrant workers' presence in services: whereas their presence in Croatia is high, in most of the countries it is around 10 percent of all the employed, and in others it is more likely to be low, as in Estonia. Employers either dealt independently with employment of migrant workers, or in some cases, as in Croatia and Estonia, organized lobbying activity for more liberal regulation. On the other hand, trade unions had weak capacities to deal with migrant workers in both tourism and retail, and rarely had a clearly formulated strategy. Similarly to the construction sector, securing minimal standards, including health and safety at the workplace, was a demand, as in the case of unions in Estonia. Characteristic to all countries is single company collective bargaining (exclusive in Poland), with some cases of sectoral agreements (tourism in Hungary, Croatia, Slovakia), multi-employer agreements (Czechia), or social dialogue (retail, Hungary, Estonia).

Challenges and best practices

In Croatia, in the tourism sector, social partners are preparing a model to apply open-ended contracts to a larger group of migrant workers. There was also a project-based activity which involved a civil society organisation, where employees would provide legal assistance and advice to migrant workers.

Table 6. Collective (autonomous) and general regulation, and engagement of trade unions and employers.
CBA – collective bargaining agreement

| country | regulation | strategies of employers | capacities and strategies of unions | collective regulation |
|---------|--|---|--|---|
| Czechia | Complicated procedure for employment of third country nationals – leading to illegal employment practices. High control of inspectorates, but unregistered agency work with Polish visa is difficult/lengthy to uncover. | High coverage among companies; increase in labour supply via relaxing the quota system and easing administrative burdens. Recommendation: procurement bids should include criteria on employees and standards. Limited engagement concentrated at large employers. | Influence over legislation via national confederation. Attempt to limit temporary agency work in the sector, collaboration with inspectorates to fight illegal employment. | Sectoral level collective regulation, social dialogue operating in practice. CBA has no provisions on employment of migrant workers. Clauses also cannot be applied to transnational workers (typically, Ukrainians with D type visa) |
| Croatia | Quota system and complicated procedure for employment. The quota system was in place until 2021 when it was replaced by the labour market test system. | Easing/abolishing the quota system, increasing labour supply. Exerting influence over regulation, pressing the state for a quality migration policy. In favour of open-ended employment contracts for migrants, prevention of abuse of work licences by fictitious agencies/restrictions on issuing licences to some TWA. Preference for workers from the region who understand Croatian, both for health and safety etc. but also for decreasing other costs. | Open unionisation, ensuring the same rights via CBAs on two levels. Challenge: access to migrant workers to provide information about rights. | Extended sectoral collective agreement, high level of interaction, revision every two years. Two level bargaining and agreements: also at the level of companies. |
| Estonia | If employment is established via a transnational arrangement (temp agency) it is especially difficult to monitor and enforce labour standards/eliminate unfair competition. | Increasing labour supply – adjusting/raising the quota system at times of business cycle/GDP growth. Preferring more legality/less seasonality, increasing the duration of visas necessary for employment to at least 2 years. Recommendation to create positive incentives for businesses – instead of penalties – to avoid semi-legal, grey employment practices. Support for targeted migration measures, especially to attract highly qualified workers on a regular basis. | Absence of a trade union! (construction workers sporadically organised via a cross-industry union) | Absent |

| | | | | |
|----------|--|--|---|---|
| Hungary | The regulatory environment and poor enforcement create a situation in which extra-institutional trust matters for migrant workers, i.e. careful selection of employers based on trust, not on rights and entitlements. | Lobbying for more flexible regulation/administration, proposing bilateral agreements, in favour of securing labour via various means, less concern about integration. | No strategy due to claimed low numbers. Language barrier and information deficit perceived as the biggest problem. | The sectoral collective agreement in place, concluded with the aim to define minimal standards. |
| Poland | Inflexibility of regulation – not adjusted to sectoral needs: “permits issued for one workplace block the possibility of posting workers to other construction sites.” | Strategy of targeting regulation: to ease excessive bureaucracy, inappropriateness. Support for liberalisation measures in order to increase labour supply. Also decentralisation: local governments should be granted regulatory autonomy helping employers to fill gaps in local labour markets. | No clear strategy. Unions did not express their interest in unionising migrant workers. | NA |
| Slovakia | Increasing the labour supply via recognition of qualifications earned abroad. | Targeting regulation via umbrella employer organisation, CBAs, targeting unfair competition. Bilateral agreements needed with the sending countries, recognition of education problematic. | Insisting on compliance with existing minimal conditions of employment and OSH in particular. Call for increased control of illegal work. Concerns over illegal employment, whereas illegal employment is on the rise. Difficulties in addressing precarious migrant workers, cooperation with authorities (and employers) to fight unfair competition. Maximising the number of jobs for unskilled migrant workers | Sectoral level collective bargaining agreements, and coverage at few large enterprises. |

In Estonia the challenge of coping with language barriers was detected. Thus, employers compiled a few pages of expressions and useful words required in certain encounters, lent study books to migrant employees etc. The topic of migrant workers has been discussed at association level working groups exchanging positive experiences and problem solving.

In Hungary, in the HCT sector, a special practice was used for solving problems of the employee cohort of Hungarian-speaking migrant workers from neighbouring countries.

In Poland, a working group was created for migrant workers at an employer organisation. There was also a plan to certify temp agencies in terms of respecting minimal employment standards for migrant workers.

5.5. Health care

Compared to other sectors, there were fewer migrant workers in the health sector, but in some cases, their number was rising in the recent years. An interesting development is the concentrated employment of physicians and nurses at some hospitals in most countries, especially Estonia, Czechia and Poland, but there are indications that a similar development occurs also in Hungary. Table 9 shows that the main reason for the low numbers is more demanding regulation for employment of professionals who, apart from passing relevant exams, also need to be fluent speakers of the local language. In terms of integration, the question of language courses is an issue that social partners are also intensively following. A common solution for many countries is to set up temporary assistant positions for professionals with migrant backgrounds. In some countries, as in Hungary and Poland, specialised working groups were established to deal with migration issues. In other countries, employers requested simplified procedures to employ migrant health professionals, as in Poland, while in Czechia employers tended not to engage in social dialogue but to concentrate their activities on lobbying. Trade unions in all the countries tended to have a general strategy, directed towards all health care workers: improve working conditions and increase wages, and had no special strategy or available capacities to deal with migrant workers.

In Estonia social partners spelled out a concrete challenge. Migrant workers were to learn the language before they arrived in Estonia, which prevented many from coming. On the other hand, those migrants who did arrive did not tend to stay for a long period in Estonia. Thus, a curious dual bottleneck persisted, of high investment and commitments and a high risk of turnover, which seems to prevent an easy solution of the situation.

Table 7. Collective (autonomous) and general regulation, and engagement of trade unions and employers.

| country | regulation | strategies of employers | capacities and strategies of unions | collective bargaining and regulation |
|---------|---|--|---|---|
| Czechia | Stiff migration rules, except for specifically designed immigration programmes and worker cohorts. | Pressing the government to increase labour supply via relaxing administrative burdens and quota, more transparent administration, improvement of integration rules. Solving labour shortages also via reliance on TWAs and subcontractors. | Managing complicated relationships between locals and migrants, occasional workplace level unionisation, info sharing leaflets and indirect influence over legislation, limiting TWA to max. 10% per company, higher enforcement of legislation, enforced co-determination rights at workplaces in terms of employment policy. Reporting cases of maltreatment to labour inspectors, project-based cooperation with NGOs. | Company level collective bargaining and CBA. Posted and temp workers – typical migrant workers rarely covered. Trade union pressing for sectoral regulation. No social dialogue in the sector. |
| Croatia | New Aliens Act in place, which abolished the quota system and replaced it with the labour market test system. Social partners were involved and cooperated during the legislative procedure via the tripartite Economic and Social Council. Better, but in the view of social partners, adjustments still needed. | Securing migrant labour via open-ended contracts, regulation via company-level agreements (covering all). Exerting influence over new legislation (modifications) with less administrative/bureaucratic procedure, and thus increasing competitiveness (no labour market test, but a 7-day trial period, as in Slovenia) | Workplace level unionisation, coverage by CBAs, tackling migrant work via addressing fake TWA. Recognised problem/challenge of employment of skilled migrant workers via temp agencies – as it seems that temp arrangement is framed as permanent. | Indirect participation of metal industry in the national Economic and Social Council. Well-functioning bipartite social dialogue at the sectoral level, but no sectoral collective bargaining. Company-level bargaining and CBA, 85% of workers covered. Agreements do not contain specific provisions related to migrant workers, but there might be a possibility to regulate education and integration needs of migrant workers. |
| Estonia | Employment of migrants is pegged to average wage, which leads wage/costs sensitive employers to turn to temp agencies registered abroad (typically in Poland) and ask for posted workers. | Lobbying government for measures in order to increase the migrant labour pool. Expectation from the government and temp agencies to inform migrant workers about their social rights etc. Easing labour shortages with higher work productivity, including automatisisation. | Metal industry: not addressing migrant workers, also due to failed attempts at unionisation. Following the situation on company levels. Low membership and capacities. Recommendations: language courses for workers in daytime. More control from labour inspectorates is needed. | Few company level CBAs and collective bargaining. |

| | | | | |
|----------|--|---|--|--|
| Hungary | Employment via temp agencies and of nationals of some third countries easier, also for seasonal employment (probationary period). Strategic partners of the government can also employ faster/directly, with less time and administrative burden. | More efficient and intensive use of labour and education reform, plus default reliance on TWAs. Direct employment of migrant workers possible for strategic partners of the government. | Typically, no developed capacities to deal with migrant workers and their integration. Information deficit on housing and travel arrangements for migrant workers. Sporadic workplace level unionisation, membership-based services, tackling migrant work and temp work simultaneously. Strategy: tackle temp work and migrant work simultaneously – limit the first one. | Sectoral social dialogue forum in practice not operating for 10+ years. Company level collective bargaining and CBA in some companies. Posted and temp workers – typical migrant workers rarely covered. Trade union pressure for sectoral regulation. Employer organisations not interested in/ authorised for collective bargaining on sectoral lines. |
| Poland | Various types of visas | Exerting influence over regulation/employment policy. Easing bureaucratic barriers and higher decentralisation – increasing the competences of local authorities. Demanding extension of temporary permits to 2 years for migrant workers. Reliance on temp agencies. | Dialogue with government representatives, formulating recommendations. Tackling migrant work and temp work simultaneously. Workplace level unionisation, membership-based services. Unions encourage migrant workers to join. Challenge: protection of posted temp workers. | Company-level collective bargaining and CBA. Posted temporary and locally employed temporary workers – typical migrant workers not covered. |
| Slovakia | Complex administration, lengthy procedures, uncertainty in approving work permits, lack of enforcement personnel, lack of information exchange between administrative units, stiff regulation. Political decision – in times of Covid – without consultation, suspending the practice of issuing work permits. | Lobbying for more flexible regulation, setting up a specialised working group for employment of migrant workers, with labour law and migration experts. Consultations, warnings about unfair competition. | Preference for employment of local workers, limiting migrant work, equal employment conditions for all – at unionised workplaces, openness to migrants unionisation. | Two-tiered collective bargaining and regulation. Social dialogue on the sector level and CBAs on company levels. No specific clauses on employment and integration of migrant workers. |

Table 8. Collective (autonomous) and general regulation, and engagement of trade unions and employers.

| | regulation | strategies of employers | capacities and strategies of unions | collective bargaining and regulation |
|----------------|--|--|--|---|
| Czechia | High threshold for regulated employment and low capacities of social partners to deal with it | Increasing labour supply individually. | Limited union capacities in the sector, no specific strategy identified. | Multi-employer CBA, but no improved working conditions compared to general legislation, company level CBA limited to large companies. |
| Croatia | The union evaluates unfavourably the new liberalised Aliens Act, employers also see it is not apt for the sector needs. | Lobbying for more weighted migration policy and easier employment of foreigners. | Low capacities and interest to deal with migrant workers. Concerns about internal conflicts with local workers (extra benefits to migrant workers in the form of free food and accommodation). | Sectoral (in force, and biannually renegotiated since 2002, sectoral minimum wages negotiated) and company level collective agreements, cooperation on health and safety for all workers. During Covid the sectoral CBA was not extended to the whole sector. SMEs had greater problems during Covid. Migrant work never discussed as a separate point. |
| Estonia | Administration more demanding for employment of migrants but sufficiently good, allows employment with somewhat more administrative costs. Influence on legislation and regulation at the national level social forum dependent on political party in power. | Employers recommend further liberalisation according to needs of the sector: extending the list of specialists needed, and extending the period for seasonal work. | Low capacities of the union, high worker turnover, unions with no real contact with migrant workers also due to seasonal work, raised concerns about internal conflicts/fear of migrant workers. Main concern of the union: secure and enforceable health and safety standards also for migrant workers, including them under standard employment contracts. | Company level CBAs in large retailers and sectoral social dialogue. |

| | | | | |
|-----------------|---|---|---|---|
| Hungary | Social security of migrant workers unresolved, regulation allowing seasonal employment, regulation leads to many forms of shady employment in the sector in general and also among migrant workers. Illegal practices also in small and micro companies. Limited enforcement due to low capacities of labour inspectorates. | Employers deal mostly individually with the employment of migrant workers. Large employers rely on temp agencies. Greater challenge for smaller companies to employ legally (cost issues). | HCT: very weak union, no capacity to deal with migrant work, Covid affected all employees and union members. Retail: did not deal specifically with migrant workers but they appeared on its agenda, attempt to unionise migrant workers (failed due to language barriers). | HCT: sectoral level CBA, but only minimal standards, company level CBAs limited to few large employers. Retail: social dialogue on the sectoral level, as a channel of information exchange and interest reconciliation working well, company level CBAs limited to some large retailers. |
| Poland | Effectiveness and implementation of current legislation are perceived as a major challenges. | Employer organisations rarely deal with migration issues, complain about administrative requirements and cooperation with public offices. Individual employers recruit separately migrant workers, provide extra bonuses. | Open to individual members but there are difficulties and few members. Unions fight for improvement of working conditions and wages for all the employed. | Collective bargaining at company level |
| Slovakia | No impact of social partners on legislation. During Covid a political decision prevented issuing work permits, which translated into service contracts for migrant workers. | Employers deal independently with employment of migrant workers, own experts and contracts with temp agencies. | Low interest to unions, it is necessary to increase labour inspections and to raise awareness among the affected employees of the impact of grey economy on all employees. | Sectoral (multi-employer?) and company level collective bargaining agreements in place, migrant worker issues not regulated, only minimal standards. Sectoral social dialogue poor. |

Table 9. Collective (autonomous) and general regulation, and engagement of trade unions and employers.

| employment forms and problems | regulation | strategies of employers | capacities and strategies of unions | collective bargaining and regulation |
|-------------------------------|--|--|--|--|
| Czechia | In line with EU regulation. Exam/test required – high threshold to enter the labour market, including passing a language test. | Employer organisations operate as interest groups rather than social partners, migration not at the centre of their activities. | General strategy for all health care workers, intention to increase control over the employment and quality requirements from migrant workers. | No sectoral dialogue, working conditions are guided by legislation, wages set by a governmental order in public health care, establishment level collective bargaining agreements/unilaterally in the private health care. Protests of nurses outside of trade union/social dialogue channels. |
| Croatia | Highly regulated, high threshold. Recognition of qualifications is a precondition for work permits and it can last 6-12 months or even more. In addition: qualification check in the profession, adjustment period of up to 3 years, professional exam, language test. | Ministry of Health developed no specific strategy for employment of migrant workers, health care institutions have autonomy to hire via public calls (tenders?). | Unions primarily aim to keep domestic nurses (and doctors) and encourage young people to enrol in medical schools. | Two-level: sectoral collective agreement and establishment level in place, plus social dialogue for health care. CBAs do not address the presence/needs of migrant workers, but there are clauses generally applicable to them. |
| Estonia | First, work placement (1-12 months), then a theoretical exam and a language test under the direction /placement of Tartu University. Hospitals in charge of language skills. | Lobbying for more liberal legislation, participation in preparing public health development plans. | No specific strategy. Coping with lack of labour via reorganisation of work. | Sectoral level collective bargaining, improvements in social dialogue, but also conflict (strike of nurses). Migrant workers fall under the CBA and enjoy the same rights. |
| Hungary | No influence over general regulation from social partners. Absence of language courses and integrative measures (e.g. evaluation of wage and tariff system in the case of foreigners) | Working group for migration established at an employer umbrella organisation. Solutions tend to be hospital specific. | General strategy for all health care workers, inclusive of migrant workers in terms of membership, but no special services designed for migrant workers. | Social dialogue on sectoral level and establishment level collective bargaining (separate rules for private and public), since February 2021 all collective agreements declared null and void, under the new regulation no collective bargaining agreements and strike possible. Until 2021, there were no special clauses on foreign born or migrant workers. |

| | | | | |
|----------|--|--|---|---|
| Slovakia | <p>Liberalised legislation (decentralisation of responsibility to establishments related to employment of migrant workers. Language proficiency needed, as well as at least 3 years praxis in the last 5), without sufficient consultation with social partners, especially unions. Long process of validation of medical diplomas for foreigners.</p> | <p>In public health care, the state aims to increase the labour supply.</p> | <p>Strategy directed towards all health care workers: improve working conditions and increase wages. No special strategy for migrant workers. Migration recognized as a threat to the quality of health care services (language and professional skills).</p> | <p>Social dialogue at the Ministry of Health, but poorly functioning, possibility of multi-establishment (sectoral?) level collective agreements, establishment level collective bargaining and agreements. Social dialogue in crisis, one confederation left the body.</p> |
| Poland | <p>High threshold-exams which few migrant workers pass, recognition of qualifications is long (several months), high fees for additional examinations. More recent changes towards liberalisation.</p> | <p>Employer representatives established specialised working groups, and employment of migrants is in focus. Requested simplified access to health professionals and increase in health care funding.</p> | <p>Improvement in working conditions for all the employed and better work-life balance.</p> | <p>Social dialogue, collective bargaining and agreements on sectoral and establishment levels – in public and private health care. No provisions on the employment of migrant workers. Social partners should be more involved in legislation.</p> |

Conclusions

The analysed 6 CEE countries have experienced acute labour shortages since 2016. The reports highlight that migrant workers are increasingly present in labour markets, particularly in the labour-intensive, low-wage sectors, and sectors which face higher insecurity on the product market, such as automotives. The report compared developments in Croatia, Czechia, Estonia, Hungary, Poland and Slovakia in terms of constraints, opportunities and challenges for industrial-relations actors, which stem from the increased presence of migrant workers in four traditional sectors – health care, construction, hospitality and retail services, and metal manufacturing, as well as services provided as part of the digitised economy (i.e. platform work). The report compared capacities and engagement among national and sectoral trade unions and employer organisations in the six countries. More particularly, the report also assessed how collective bargaining and social dialogue tackled the issue of migrant workers in the analysed countries, and indicated similarities and differences in social partner responses.

Employment regulations on third country nationals outlined a specific pattern of employment of migrant workers but also contributed to their rather shallow, instrumental labour market integration. As a main rule, regulation of third country nationals' employment is restrictive in all the countries. The general rule is that third country citizens could establish an employment relationship only after a work permit had been issued by relevant bodies. Under conditions of acute labour shortages such rigid regulations in most cases became “diluted” with an increasing number of exceptions, which goes against the spirit of the strict rule. Employment of migrant workers concentrates on seasonal, short-term and temporary employment schemes, in which the role of transnational posting and the role of intermediaries, particularly temporary work agencies, increased in almost all the countries, but in varying degrees among sectors. In the countries in which migrant workers were to be employed under conditions where wage levels should be maintained, transnational posting was a challenge (Estonia, Czechia). In others, temp agency work was predominant, particularly in Hungary, Poland and Slovakia. Croatia represents a partial exception, as both of these forms were present, but not to the same degree as in other countries.

In the analysed six countries, we can see that rigid employment regulations are in place with increasing tolerance for temporary and seasonal jobs for migrant workers. Such regulatory background went hand in hand with cyclical migration in all the countries. Moreover, the dominantly temporary, cyclical migratory movements also induced shallow labour market integration of TCN migrant workers. Interviews with social partners and experts, as well as administrative data highlighted typically seasonal or temporary job contracting, with limited social security.

Regulation was also at the centre of social dialogue, but social partners' and especially unions' concerns about implementation and preservation of standards surfaced, as well. Employer organisations and trade unions interpreted labour migration from outside the EU differently. Employer organisations in general had more capacities than trade unions, which they used to lobby or launch initiatives to amend and liberalise the regulations. Trade unions typically used available national social dialogue forums to exert influence, but at least in some cases noticed the deterioration of social dialogue at the national level, especially in Hungary, but also in Poland, and partially in Slovakia. Social dialogue improved in Estonia, however it developed from a very modest role compared to other countries.

Collective bargaining in all the countries is decentralised to company and establishment levels, and in some countries the sectoral level also has a certain role. Sectoral bargaining occurs in Croatia, Slovakia and Czechia, but sporadically it happens also in Hungary in some sectors, as in construction and tourism, but with a very narrow agenda. Bargaining coverage varies and is the highest in Croatia, followed by modest coverage rates in Czechia, Slovakia and Hungary, while the lowest ones are in Estonia and Poland. The platform economy is beyond capacities and engagement of employer organisations, also since the platform-driven economy is not sufficiently regulated in any of the countries. In other sectors, employer organisations or individual employers attempted to find good solutions also for migrant workers, in varying degrees. Positive cases include: employer practices and initiatives in the Hungarian tourism (individual employers), in the construction industry: sectoral contracting practices in Croatia and initiatives in Slovakia, and contracting practices in the Croatian metal sector. In the health sector in Poland and Czechia there also seem to be good initiatives on an individual establishment level.

Collective bargaining has not covered TCN migrants and their integration in the labour market so far. No joint solutions are proposed. Likewise, in social dialogues, where employers and trade unions meet, there is no debate on migrant workers from neighbouring non-EU member states.

In some sectors there are no employee representatives at all: this is the case in the platform sector, but also there is no trade union in the construction sector in Estonia. Except for the positive case of Croatia, where trade unions are open to organise migrant workers and insist on sector level collective bargaining, but also engage in transnational cooperation actions with other trade unions, in other countries in the construction sector union capacities are acutely weak, and the unions attempt at best to exert influence over legislation via national level union confederations. In the selected service sectors unions reached out to migrant workers typically only at large retailers, and attempted to unionise them. Health care and automotives were similar in the sense that unions in both sectors in all the countries had a default strategy of representing all the employed, and migrant workers were not excluded. However, whereas unions were open to migrant workers, there were no specific services developed for them. Positive cases were recorded in Czech automotives and in Estonian health care.

National reports also formulated recommendations both to national authorities and social partners. The Russian aggression and war, and the resulting wave of refugees from Ukraine, as well as the global crisis only increased the importance of these conclusions and recommendations.

Country reports had similar recommendations, which could be classified into five main claims.

1. Increase state support for social dialogue, put the issue of integration of migrant workers on the agenda, and hold regular discussions. As part of social dialogue most national reports also highlighted the need to re-evaluate regulation of migrant workers' employment and social security, as well as to develop long-term strategies for labour market integration of migrant workers.
2. In order to engage in informed discussions, development of capacities of social partners, especially trade unions, is needed. In particular, trade unions face language barriers and other difficulties in addressing and unionising migrant workers, typically uninformed, employer-dependent employees. Cooperation with civil society organisations or longer-term project-based work with migrant workers could be a possible way to go ahead.
3. Strengthen implementation of regulations, so as to enforce fair competition and prevent social dumping. Such measures are especially important in labour cost sensitive sectors, where informal contracting or transnational contracting (posting) are common.

4. Develop comprehensive policies and actions, especially those in support of social rights of migrants. These policies and actions should include: organisation of language courses for migrant workers, informing migrant workers about their rights, e.g. via info points, as well as awareness rising about the rights of migrant workers among employees of public services.

5. Monitor and assess the situation of migrant workers on the labour market, by collecting good and up-to-date information (covering aspects such as age, education level, gender etc.), and conducting comprehensive and regular research on migrant workers and their labour market integration. Creation of publicly available databases with relevant data is also important to tackle anti-migrant sentiments in all the countries.

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Appendix / Interviews

| COUNTRY | INTERVIEW CODE / DATE | POSITION/ROLE |
|----------------|----------------------------|--|
| CZECHIA | IO01CZ12022021 | Expert |
| | EX01CZ02022021 | Expert |
| | TU01CZ13042021 | Trade union representative |
| | EM01CZ23012021 | Employer organisation representative |
| | TU02CZ02022021 | Trade union representative |
| | WK01CZ01022021 | Worker, platform economy |
| | EM02CZ19022021 | Employer organisation representative |
| | EX02CZ24012021 | Civil or other intermediary support organization |
| | TU03CZ17022021 | Trade union representative |
| | IO02CZ04032021 | Civil or other intermediary support organization |
| | TU04CZ02032021 | Trade union representative |
| | TU05CZ12012021 | Trade union representative |
| | WK02CZ13052021 | Trade union representative |
| TU07CZ27082021 | Trade union representative | |
| SLOVAKIA | EM01SK23022021 | Representative of an employer organizations |
| | EM02SK26022021 | Employer |
| | EM03SK30032021 | Employer |
| | EM04SK11042021 | Representative of an employer organizations |
| | EM05SK12042021 | Representative of an employer organizations |
| | EM06SK12042021 | Employer |
| | EM07SK12042021 | Employer |
| | EM08SK13042021 | Representative of an employer organizations |
| | EM09SK25052021 | Employer |
| | EM10SK25052021 | Employer |
| | TU01SK15032021 | Trade union representative |
| | TU02SK21092021 | Trade union representative |
| | EX01SK26032021 | Expert |

| | | |
|---------|--|---|
| | EX02SK29042021 EX03SK19052021 EX04SK22062021 IO01SK16032021 WK01SK09042021 RT01SK15032021 RT02SK02042021 | Expert Expert Expert Civil or other intermediary support organization Worker Recruiter, temp agency representative Recruiter, temp agency representative |
| ESTONIA | TU1EE060121 EM1EE140121 TU2EE200121 EM4EE030221 EM6EE150221 TU3EE280121 EM3EE030221/RT1EE030221 EM5EE100221 EM2EE010221 TU4EE010421 EM7EE110321 RT2EE060421 | Trade union representative Employer organisation representative Trade union representative Employer organisation representative Employer organisation representative Trade union representative Employer organisation, temp agency representative Employer organisation representative Employer organisation representative Trade union representative Employer organisation representative Temporary work agency representative |
| POLAND | IO01PL21012021 EM02PL26012021 RT01PL26022021 EM01PL24032021 TU01PL25032021 TU02PL281220 EX01PL02032021 EM02PL02022021 EM03PL05022021 WK01PL01042021 EM03PL05022021 EM01PL25032021 EM02PL27032021 RT02PL03162021 TU03PL18032021 IO04PL01042021 IO05PL01042021 EX02PL29042021 RT02PL26032021 | Civil society organisation representative Employer organisation representative Temporary work agency representative Employer organisation representative Trade union representative Trade union representative Expert Employer organisation representative Employer organisation representative Worker Employer organisation representative Employer organisation representative Employer organisation representative Temporary work agency representative Trade union representative Civil society organisation representative Civil society organisation representative Expert Temporary work agency representative |

| | | |
|---------------|----------------------|--|
| CROATIA | RT06PL23022021 | Temporary work agency representative |
| | TU04PL20042021 | Trade union representative |
| | 20 March 2021 | Expert |
| | 5 March 2021 | Chamber of Nurses |
| | 5 March 2021 | Employers' Association – Association of Metal Industry |
| | 9 March 2021 | Interview Croatian Employers' Association and Association of Construction Employers |
| | 4 March 2021 | Croatian Employers' Association and Association of Hospitality and Tourism |
| | 27 May 2021 | Croatian Employment Service |
| | 27 May 2021 | Interview CMDC – Croatian Medical Doctors Chamber |
| | 20 May 2021 | Croatian Trade Union of Nurses – Medical Technicians |
| | 8 October 2021 | Digital Platform Workers' Trade Union |
| | 8 April 2021 | Expert, labour economy |
| | 28 May 2021 | Expert, Migration |
| | 28 May 2021 | Trade Union of Health and Social Welfare representative |
| | 7 October 2021 | Worker activist, expert |
| | 24 April 2021 | Ministry of the Interior |
| | 1 July 2021 | Ministry of Health of the Republic of Croatia |
| | 23 February 2021 | Trade Union of Construction Industry representative |
| | 10 March 2021 | Trade Union of Metal Workers, Industry level Trade Union |
| | 24 April 2021 | Trade Union of Tourism and Services |
| 18 March 2021 | Expert | |
| 11 May 2021 | Expert, Legal | |
| 23 March 2021 | Expert, construction | |
| HUNGARY | TU01HU04022021 | Trade union representative |
| | EX02HU03022021 | Expert |
| | EM01HU23022021 | Employer / representative of an employer organisations |
| | EM02HU26022021 | Employer / representative of an employer organisations |
| | EX01HU14012021 | Expert |
| | TU03HU11022021 | Trade union representative |
| | TU04HU12022021 | Trade union representative |
| | TU05HU18022021 | Trade union representative |

| | |
|----------------|----------------------------|
| IO01HU02042021 | Expert |
| TU02HU08022021 | Trade union representative |
| WK01HU10052021 | Worker / worker activist |
| TU06HU04062021 | Trade union representative |
| WK02HU02062021 | Worker / worker activist |
| EX03HU05032021 | Expert |
| IO0312072021 | Interpreter |
| WK03HU04082021 | Student worker |
| TU07HU | Trade union representative |
| EX04HU24062021 | Ministry of Economy |

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