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# Future skill demand and supply of migrant labor in Italy

Francesco Panzica and Natalia Popova

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## ABBREVIATIONS

|             |  |
|-------------|--|
| ANPAL       | Agenzia Nazionale Politiche Attive del Lavoro              |
| BLMA        | bilateral labor migration agreement                        |
| CEDEFOP     | European Centre for the Development of Vocational Training |
| CPIA        | Provincial Centre for Adult Education                      |
| DEF         | Economic and Financial Document of the Italian government  |
| FTE         | full time equivalent                                       |
| GDP         | gross domestic product                                     |
| ILO         | International Labour Organization                          |
| IMIS        | Integrated Migration Information System                    |
| INAPP       | National Institute for Public Policy Analysis              |
| ISCED       | International Standard Classification of Education         |
| ISCO        | International Standard Classification of Occupations       |
| ISMU        | Institute for the Study of Multi-ethnicity                 |
| ISTAT       | Italian National Institute of Statistics                   |
| MIUR        | Ministry of Education, University and Research             |
| MoLSP       | Ministry of Labour and Social Policies                     |
| PES         | Public Employment Services                                 |
| PNRR        | National Recovery and Resilience Plan                      |
| TVET        | Technical and Vocational Education and Training            |
| Unioncamere | Italian Association of the Chambers of Commerce            |
| WEF         | World Economic Forum                                       |

# Future skill demand and supply of migrant labor in Italy

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## EXECUTIVE SUMMARY

The present study considers the evolution of demand for migrant workers' skills and qualifications in Italy, and projects future demand, in order to provide policy makers with evidence-based advice. Its methodology combines quantitative and qualitative analyses and makes a technical comparison of different forecasting methods and tools.

Starting in the 1980s, Italy has been transforming into a destination and transit country for migrants from different parts of the world. Foreign workers residing in Italy represent 8.9 percent of the total population, one-third of them being from Member States of the European Union (EU). Currently, they account for 11.7 percent of the Italian labor force.

Most migrants work in the services sector, followed by industry, construction, and agriculture. Women migrant workers are highly concentrated in the services sector, at about 40 percent of all such workers, compared with 7 percent of men migrant workers. Migrant workers have been hit particularly hard by the COVID-19 pandemic due to differences in the distribution of occupations between migrant and national workers, and the type of contracts they have.

Two main sources are used to forecast the Italian labor market's demand for national and migrant workers, across skill levels:

- The Excelsior System, which forecasts the skills in demand for the next five years (2021–25). The analysis takes into consideration the impact of the COVID-19 pandemic. The largest occupational shortages are identified in manufacturing and services. Most of the new jobs estimated (almost 2.6 million) would be created due to replacement demand.
- The European Centre for the Development of Vocational Training (CEDEFOP), which in 2018 issued a long-term forecast that covered the period up to 2030. It assumed the EU economy's continuous but modest growth over the entire period, and forecasted increased demand for high-skilled occupations, such as business and administration associates and health professionals, as well as clerks and teaching professionals. The estimates have not yet been updated to reflect the impact of the COVID-19 pandemic.

To address the COVID-19 pandemic, the Italian government has invested about €180 billion in various measures and set an ambitious development plan that aims at relaunching the labor market and ensuring social cohesion.

Policy recommendations over the short term include the following:

- *Adopt a systemic approach in addressing the informal economy by extending migrant regularization measures to all sectors.* Irregular migrant workers' possibility of receiving a temporary work permit of six months could be extended to other sectors and for a longer period. For migrant workers exposed to the risk of unemployment, special measures for the renewal of work or residence permits can contribute to ensuring both access to essential services and

avoiding an increase in irregularity. Access to skills recognition and skills development measures could facilitate migrant workers' labor market integration.

Policy recommendations for the medium and long term may include the following steps:

- *Enhance the skill demand forecasting system* by integrating occupation-specific details that could enhance skills matching and improve the governance of labor migration. In this effort, there is a need to involve civil society and other key stakeholders.
- *Address the issue of over- and underqualification, affecting both national and migrant workers.* Being a structural problem, this could be addressed through collective bargaining and specific measures. The Ministry of Labour and Social Policies, in collaboration with regional governments, could launch programs for skills upgrading and professional reorientation, to be carried out at specific technical and vocational education and training centers.
- *Address the need for seasonal workers and the supply of qualifications and skills for hard-to-fill vacancies* by adapting the existing bilateral labor migration agreements or designing new ones, as appropriate. This could also help tackle the high rates of informality among seasonal migrant workers.

## INTRODUCTION

The Global Knowledge Partnership on Migration and Development (KNOMAD), chaired and managed by the World Bank, aims to support policy makers in origin, destination, and transit countries with analytical knowledge on labor migration.

In this context, KNOMAD, under its Thematic Working Group 2 on Labor Migration, chaired by Ibrahim Awad, Professor at the American University in Cairo, and cochaired by Michelle Leighton, Chief, Labour Migration Branch, International Labour Organization (ILO), is currently undertaking two case studies in one industrialized and one emerging economy, namely Italy and Costa Rica, focused on analyzing the evolution of the demand for migrant workers' skills and qualifications, and their projected future demand. The idea is to develop a methodological approach to be further tested in other national and regional contexts. The results could help countries formulate evidence-based labor migration policies that consider specific skill needs and address brain drain and brain waste.

The present report focuses on Italy and provides a systematic forecast of skill demand and an overview of labor migration policies. It could be used as an analytical tool to support policy makers. Given the current COVID-19 restrictions, collecting qualitative data through semistructured interviews of key informants proved unfeasible. Therefore, the research is based upon a desk review of secondary data sources, policy documents, laws and regulations, as well as relevant academic research on the development of the Italian labor market, including the role of migrant workers, over the past 30 years.

The report contains six sections, excluding the introduction. Section 1 describes the methodological approach. Section 2 provides an overview of the socioeconomic context of the country. Section 3 concentrates on the Italian labor market, including the role of migrant workers. Section 4 provides an overview of Italian migration policies. Section 5 analyzes the impact of the COVID-19 pandemic on the Italian labor market and, in particular, on labor migration. The last section summarizes the main findings and makes policy recommendations, based upon possible post-pandemic scenarios.

## SECTION 1. METHODOLOGY

### 1.1. Terminology

For the purposes of this research, foreign workers resident in Italy are distinguished by their country of origin. Those who are citizens of EU Member States benefit from the free movement of workers, which is a fundamental principle of Article 45 of the Treaty on the Functioning of the European Union. This implies that there is *no discrimination based on nationality between workers of the Member States as regards employment, remuneration and other conditions of work and employment* (EU 2012, 47–390). Therefore, foreign workers falling in this category are not considered migrant workers. Meanwhile, workers coming from countries outside of the European Union, who do not have automatic access to the EU labor market, are referred to as migrant workers.

It should be noted that “refugees and asylum-seekers may be members of the labour force in the destination country, but their reason for leaving the country of origin is purportedly to seek international protection and is not to seek work” (ILO 2018, para. 4). In the context of this paper, “working or seeking

work refugees and asylum-seekers, irrespective of authorization to work during processing of refugee status or sanctuary request” are covered, as per guidelines of the International Conference of Labour Statisticians concerning statistics on international labor migration (ILO 2018).

It is noteworthy that in the document the terms “skills anticipation” and “skills forecasting” are used interchangeably. Skills anticipation is a strategic and systematic process through which labour market actors identify and prepare to meet future skills needs, thus helping to avoid potential gaps between skills demand and supply (ILO 2015).

## 1.2. Methodological approach

The methodological approach builds on quantitative and qualitative analyses, based on different secondary data sources, both national and international. The added value of this methodological approach is to cover both labor demand at the macro level as well as specific occupational qualifications and skills gaps at the micro level, thus enhancing the accuracy of forecasts of recruitment needs. All quantitative data relating to demography, the labor market, and economic indicators have been derived, unless otherwise indicated, from the Italian National Institute of Statistics (ISTAT), with a reference year of 2020.

Regarding the analyses of labor demand in Italy, many organizations carry out short-term surveys on skills needs. Examples include surveys carried out by the National Institute for Public Policy Analysis (INAPP)<sup>2</sup> (e.g., the Participation, Labour, Unemployment Survey<sup>3</sup>; the *Programme for the International Assessment of Adult Competencies*<sup>4</sup>), Unioncamere through the Excelsior System, regional governments, employers’ organizations (e.g., Confindustria, Assolombarda), training institutions, and so on.

Since 2012, many resulting studies have been published in the National Integrated Information System of Professions’ (SISTAN), hosted by the ISTAT, to ensure a coherent approach and widespread information sharing.<sup>5</sup>

In this report, analyses of the demand for migrant workers in Italy are also based on the European Centre for the Development of Vocational Training’s (CEDEFOP’s) skill supply and demand quantitative projections up to 2030 (CEDEFOP and Eurofound 2018). CEDEFOP uses an E3ME type of model, and harmonized international data. For individual EU Member States, a common methodological approach is in place allowing cross-country comparisons of employment trends.<sup>6</sup> At the country level, the forecasts and methodologies are validated by a group of national experts. At present, these forecasts do not take into consideration the impact of the COVID-19 pandemic.

Policy analysis of labor migration governance in Italy is based on the Resolution Concerning Fair and Effective Labour Migration Governance (ILO 2017), as well as the ILO’s general practical guidance on promoting coherence among employment, education/training, and labor migration policies (Popova and

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<sup>2</sup> See [https://inapp.org/it/Rilevazioni\\_in\\_corso/indagine-campionaria-sulle-professioni](https://inapp.org/it/Rilevazioni_in_corso/indagine-campionaria-sulle-professioni).

<sup>3</sup> See <https://inapp.org/it/dati/plus>.

<sup>4</sup> See <https://inapp.org/it/dati/piaac>.

<sup>5</sup> See <https://www.istat.it/it/archivio/18841>.

<sup>6</sup> The E3ME is a computer-based model, developed by Cambridge Econometrica, of the world’s economic and energy systems and the environment. The model has been used for several recent high-profile assessments, including the contribution of employment projections to CEDEFOP’s annual skills forecasts.

Panzica 2017). The analysis encompasses the vertical coherence (at international, regional, national, and local levels) and horizontal coherence among labor migration, employment, and education/training policy domains.

Information on the impact of COVID-19 on the Italian labor market has been derived from recent studies and analyses carried out by national and international organizations. Scenarios for the years following the COVID-19 pandemic are based on assumptions derived from European and Italian government policy documents and social partners' forecasts.

### 1.3. Limitations of the study

The analysis is heavily conditioned by the ongoing effects of the COVID-19 pandemic and would require a complementary analysis in the future, allowing more detailed modeling of the actual impact of the pandemic on the economy and on labor migration trends. This situation also affects future labor demand estimates, as COVID-19's impact on skills demand has not yet been captured. In addition, it will be helpful to assess the changes introduced as a reaction to the COVID-19 pandemic in terms of tasks that can be performed in smart working, and emerging skills necessary amid increased digitalization. Most of the data were collected prior to the pandemic; however, official COVID-19 employment-related figures have been included, where available. In this regard, the replicability of the method is most likely in noncrisis situations.

The analysis has not benefitted from primary data collection and in-depth interviews with key informants due to travel restrictions imposed during the COVID-19 pandemic. This situation reduces the possibility of identifying future labor migration trends in detail.

### 1.4. Applicability of the methodological approach in other contexts

The replicability of the methodological approach used in this paper requires the presence of a minimum set of conditions, listed below, which may present country-specific risks:

- *A consistent financial effort, a strong organizational structure, and a legal framework.* The sample of enterprises should be large enough to be representative and the response to the questionnaire compulsory. This could be challenging in contexts with a widespread informal economy, and lack of effective compliance mechanisms. It is necessary that data collected from the questionnaire be cross-checked with other sources. In addition, the organization in charge of the surveys should be in a position to analyze and contextualize the data collected and present it in a user-friendly format.
- *Surveys to be organized by the National Statistical Office, the Ministry of Labour, or the Public Employment Services (PES).* The strong involvement of social partners in survey design and implementation, and their continuous improvement, are critical. It is also important to communicate labor market demand and skills gaps to the education and training system. Social partners' contribution to all phases of the labor migration policy process will not only enhance skills matching but also the protection of migrant workers' rights. In Italy, social partners are actively involved in policy making in the employment, migration, and education domains. The

replicability of the methodological approach outlined in this study requires the participation of the government and social partners.

## SECTION 2. SOCIOECONOMIC CONTEXT

Starting in the 1980s, Italy has been transforming into a destination and transit country for migrants from different parts of the world. Migration flows have been increasing, while the national population has been decreasing in the past five years, due to a falling birth rate (1.18 per woman in 2019). Italy is now facing an advanced stage of the demographic transition, with younger generations not being able to replace older ones and migration being insufficient to counter this trend (Goujon et al. 2021).

The number of births (435,000), with a net migration of 143,000, does not balance the number of the deaths (647,000). As of January 2021, the resident population in Italy was 59.6 million persons **out** of which 8.5 percent (5,040,000) were foreigners. The median age is 45.7 years, indicating an aging trend (ISTAT 2021b).

The gross domestic product (GDP) shows a limited annual increase, and has been heavily influenced by international shocks such as the 2008 financial crisis. Concerning GDP per capita, in 2018 the World Bank estimated purchasing power parity (PPP) at US\$42,798 (World Bank 2020). This indicator must be considered together with an uneven wealth distribution due to north-south economic disparities, and poverty levels affecting many families. According to ISTAT, in 2019, 1.7 million families (4.6 million individuals) were in absolute poverty.<sup>7</sup> Ten percent of the families in Southern Italy belonged to this category, while 5.3 percent and 5.8 percent, respectively, were in Central and Northern Italy. It is important to note that in 2005, 1.9 million persons were in absolute poverty, indicating a trend of growing absolute poverty, which was also influenced by the global financial crisis in 2008. In 2018, absolute poverty severely affected foreign citizens (with 30.3 percent, or 1.5 million, in absolute poverty).

A significant macroeconomic factor that limits the state's ability to provide social and economic assistance is the country's large public debt, which reached €2,447 billion in February 2020. This could be traced back to the period 1970–90, which was characterized by increasing public expenditure, high inflation, and low GDP growth rates. The public debt in 2020 represents 157.5 percent of the GDP. The public debt will further increase due to additional extraordinary measures necessary for combating the effects of the COVID-19 pandemic.

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<sup>7</sup> As per ISTAT's definition, the level of absolute poverty is based upon the minimum amount necessary for purchasing a bundle of goods and services necessary for life. It changes according to the composition of the family and the geographical location.

## SECTION 3. THE ITALIAN LABOUR MARKET

The high public debt, combined with the effects of the financial crisis in 2008, had a strong impact on the Italian labor market, resulting in the high death rate of enterprises (-43,274 in 2009, +9,857 in 2010, -34,941 in 2011), negative GDP (-2.4 percent in 2012 and -1.9 percent in 2013), and job losses (-336,000 in 2009, -153,000 in 2010).

In 2019, the labor force participation rate in Italy was 65.7 percent with a considerable gender gap: the rate for males was 75.0 percent and 56.5 percent for women. Most employment opportunities were concentrated in the service sector (70.1 per cent), while industry (including construction) and agriculture accounted, respectively, for 26.1 percent and 3.8 percent. Most female employment was in the services sector.

Almost two-thirds of jobs are in small enterprises, while big enterprises (250+ employees) create 22.5 percent of jobs, even if they represent less than 0.1 percent of the total enterprises in Italy.

The Italian labor force is characterized by relatively high levels of educational attainment, even if lower than the EU averages. In 2018, 61.7 percent of the age group 25–64 years had at least a secondary education diploma (in the EU-28, the average was 78.8 percent). The persons with tertiary education are 19.3 percent in Italy, compared with 32.3 percent in the European Union.

In 2019, 29 percent of the 15+ population had low levels of education (levels 0–2 of ISCED<sup>8</sup> 2011), 47.0 percent had medium levels of education (ISCED levels 3–4), and 23.3 percent had a higher education level (ISCED levels 5–8).

Skills mismatches appear to be an important challenge. In 2017 almost one-third of workers with higher and secondary education (respectively, 33.1 percent and 36.0 percent) were in jobs requiring a lower level of education.

In the fourth quarter of 2020, almost 35.4 percent (or 13,503,000 persons) in the working-age group (15–64 years) were found to be inactive (ISTAT 2021a). Most had low levels of education, while 30.1 percent had completed secondary education and 16.9 percent tertiary education. This group includes persons in education or training (33 percent), persons with family responsibilities (22.3 percent), retired persons (15.5 percent), discouraged workers (10.7 percent), and others (18.5 percent). It might also include persons working in the informal economy, which in Italy, in 2017, was estimated at €211 billion, or 12.1 percent of GDP. The undeclared work involved 3.7 million workers, mainly in specific economic sectors, such as in services (16.8 percent), agriculture (18.4 percent), construction (17.0 percent), and industry (7.6 percent) (ISTAT 2017).

### 3.1. [Migrant workers in Italy](#)

#### 3.1.1. Overview of migration trends

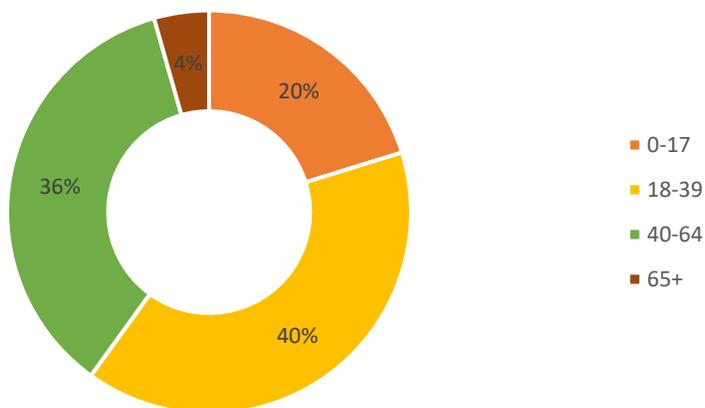
As already mentioned, the foreigners residing in Italy represent 8.5 percent of the total population. One-third of the foreigners are from EU Member States, while most of the migrants from outside the EU come from Africa (21.6 percent), Asia (20.8 percent), and the Western Balkans (19.9 percent).

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<sup>8</sup> International Standard Classification of Education.

The distribution of the foreign population by age (see figure 3.1) shows an average of 34.8 years of age, far lower than the national population (45.7 years).

**Figure 3.1 Age distribution of foreign population in Italy**



Source: ISTAT 2019.

Foreign workers account for 11.7 percent of the total Italian labor force (see table 3.1).

**Table 3.1 Workforce in Italy by nationality and employment status, 2019**

| Nationality        | Employed          | Unemployed       | Inactive          |
|--------------------|-------------------|------------------|-------------------|
| Italy              | 20,854,680        | 2,179,568        | 11,998,679        |
| EU countries       | 820,764           | 133,068          | 345,407           |
| Extra EU countries | 1,684,422         | 268,892          | 829,652           |
| <b>Total</b>       | <b>23,359,866</b> | <b>2,581,528</b> | <b>13,173,738</b> |

The above figures show that foreign workers have higher employment rates than native-born workers. More challenging appears to be the situation of women migrant workers, who present a lower employment rate and a higher inactivity rate (see table 3.2).

**Table 3.2 Labor market rates by nationality and sex (15–64 years), 2019**

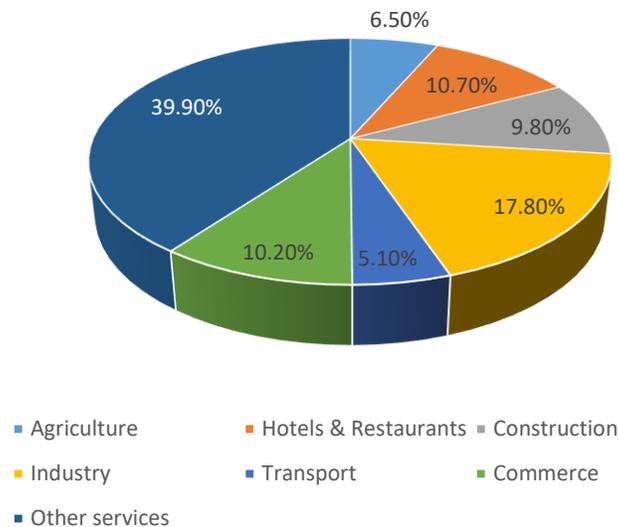
| Nationality              | Employment rate |      |       | Unemployment rate |      |       | Inactivity rate |      |       |
|--------------------------|-----------------|------|-------|-------------------|------|-------|-----------------|------|-------|
|                          | M               | F    | Total | M                 | F    | Total | M               | F    | Total |
| Italian                  | 67.3            | 50.2 | 58.8  | 8.8               | 10.4 | 9.5   | 26.0            | 43.9 | 34.9  |
| EU mobile workers        | 74.1            | 55.0 | 62.8  | 12.1              | 15.6 | 14.0  | 15.7            | 34.7 | 26.9  |
| Extra EU migrant workers | 74.0            | 46.5 | 60.1  | 11.7              | 16.7 | 13.8  | 16.2            | 43.9 | 30.2  |

Source: MLSP 2020.

This could be explained by many women’s need to take care of children and families. Similarly, the high rates of unemployment among both male and female migrant workers can be explained by their relative vulnerability in the labor market, leaving them to be the hardest hit by economic fluctuations.

Most migrants work in the services sector, followed by industry and construction (see figure 3.2). Agriculture absorbs only 6.5 percent of migrant workers, but their presence constitutes 16.9 percent of all employees in the sector.

**Figure 3.2 Migrant workers by economic sector**



Source: ISTAT 2019.

As with other EU Member States, the aging society in Italy has produced increasing demand for health and long-term care services, which has been satisfied with intra-EU mobility and labor migration from third countries. Of the EU’s almost 2 million foreign-born workers in health and long-term care services, two-thirds were absorbed by Germany, Italy, France, Spain, and Sweden (Grubanov-Boskovic et al. 2021).

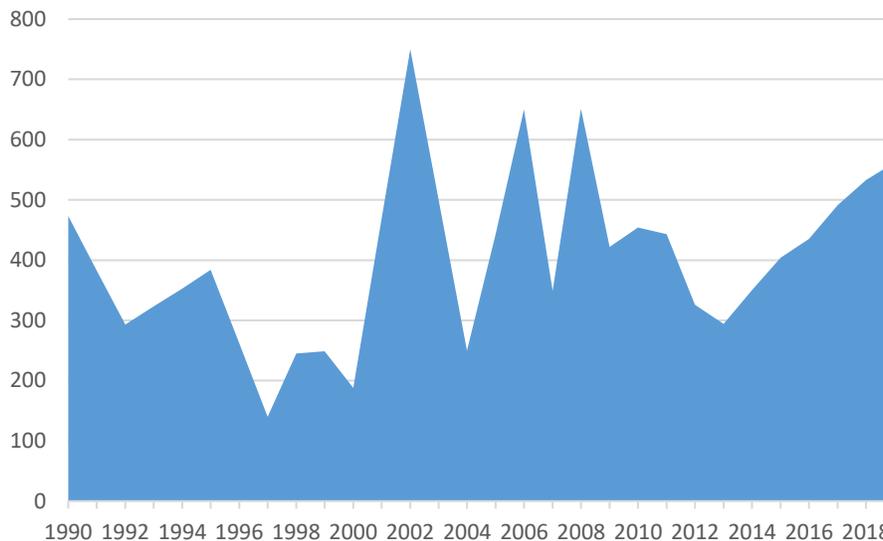
The geographical distribution of migrant workers mirrors the economic structure of the country and thus workers are concentrated in the northern regions of Italy (57.9 percent) followed by the central ones (26.3 per cent). Only 15.8 percent of migrants can be found in the south.

Women migrant workers represented an average of 51.7 percent of all migrant workers in 2019, but the gender composition varies greatly by country of origin: women account for most migrants from Romania, Ukraine, Moldova, Poland, and Latin American countries. The situation is the reverse in the case of African and Asian communities. Women migrant workers are highly concentrated in the services sector, at about 40 percent, compared to 7 percent of men migrant workers (Frattini and Sartori 2021).

The COVID-19 pandemic had a much stronger impact on migrant workers than nonmigrants. Among other factors, this could be attributed to the differences in the distribution of occupations between migrant and national workers, and the type of contracts. Migrant workers have more temporary contracts compared to nationals (in 2019: 20 percent vs. 14 percent). In addition, many jobs held by migrant workers cannot be carried out remotely; in a word they are less “teleworkable” (Frattini and Sartori 2021).

A significant share of foreigners in Italy consists of irregular migrants, yet it is difficult to find reliable figures. In 2020, the Foundation on Initiatives and Study on Multi-ethnicity (Fondazione ISMU 2020) estimated 562,000 irregular migrant workers. As shown in figure 3.3, the number of irregular migrants has fluctuated a lot, and has gradually declined, due to periodic regularizations, for example, in 2002 and in 2006. The increasing numbers from 2014 onward capture the growing inflows in those years and probably the impact of the recent restrictive norms for asylum.

**Figure 3.3 Estimated irregular migrants in Italy (in 000s), 1990–2019**



Source: Fondazione ISMU 2020.

Note: The number of irregular migrants includes all foreigners without a valid permit of stay.

The labor market integration of migrant workers is particularly challenging for those working in the informal economy. Non-migrant workers can admittedly also be undeclared, but the phenomenon is more significant for migrant workers. According to ISTAT, in 2017 the highest incidence of informal work was observed in agriculture (18.4 percent), services (16.8 percent), construction (17.0 percent), and trade, transport, hotels, and restaurants (15.8 percent). In some sectors, such as agriculture and construction, informality can be associated with cases of severe exploitation linked to forced labor and human trafficking. When it comes to implementation of the bilateral labor migration agreements (BLMAs), the Italian Ministry of Labour, together with the PES, carries out international recruitment.

To address this reality, the Italian government adopted Law No. 199 of 2016, declaring abusive recruitment practices and exploitation as crimes. Further, the Ministry of Labour and Social Policies (MLSP) launched a three-year Action Plan on February 20, 2020. The plan is based on the principles of the ILO Forced Labour Convention, 1930 (No. 29), and the related Recommendation (No. 203) of 2014 (ILO 1930, 2014), as well as the EU Directive on Preventing and Combating Trafficking in Human Beings and Protecting Its Victims (EU 2011). It elaborates 10 specific actions in the main areas of prevention, enforcement, assistance, and socioeconomic reintegration of workers in the informal economy.

Another important indicator of migrants' integration is provided by the level of their wages, compared to those of nationals. In 2018, the average yearly wage of migrant workers was 35 percent less than the average wage earned by nationals—€13,992 and €21,693, respectively. Part of this difference could be explained by the fact that migrant workers held lower-skilled jobs and worked fewer days (MLSP 2019).

The wage difference is particularly high for women migrant workers, who received an average net monthly wage of €852 (-30.2 percent). In 2018, female citizens of the EU received €959 (-22 percent), compared with €1,230 for national women workers (MLSP 2019). These differences have a significant impact on the living conditions of migrant workers in Italy. ISTAT calculated that in 2018, 30.3 percent of the migrant workers were living in absolute poverty.

Another area of integration could be through entrepreneurship and the establishment of new enterprises. According to Unioncamere data, at the end of 2019, migrants owned 602,180 or 9.9 percent of Italian enterprises; out of these, 379,161 were owned by Extra EU migrants (IDOS 2019). The majority are individual companies and operate in trading, construction, and services. The Moroccan, Chinese, Romanian, Albanian, Bangladeshi, and Senegalese communities are among the most active in entrepreneurship.

## 3.2. Labor market demand and supply

### 3.2.1. The education and training system in Italy

The first cycle of education is compulsory and lasts eight years (covering children from 5 to 14 years of age). This cycle is made up of:

- Primary education (lasting 5 years), for children between 6 and 11 years of age.
- Lower secondary school (lasting 3 years) for children between 11 and 14 years of age.

At the end of the compulsory cycle, students can choose between the following pathways:

- Upper secondary school (lasting 5 years) for students from 14 to 19 years of age. This is offered by lyceums, technical institutes, and vocational institutes. All offer access to university.
- Three- and four-year vocational training courses for students who have completed the first cycle of education, organized by regions. Three-year courses lead up to a vocational training certificate; four-year courses result in a diploma. A specialization with an additional fifth year of training is currently offered only in the Province of Bolzano and in the Lombardy Region.

In the 2018–19 school year, 860,000 foreign students (or 10 percent of the total students) were enrolled in the Italian education system. Foreign students prefer to opt for technical and vocational training after the compulsory cycle, while only 20 percent choose to go to upper secondary schools. These choices are often conditioned by the need for students from migrant families to enter the labor market as soon as possible to be able to earn a livelihood. The dropout rates among students with a migrant background are high: at the end of the first year of upper secondary school, only 65.8 percent of them proceed to the following year, compared to 79.7 percent of Italians (MIUR 2019).

Apprenticeship programs are important tools fostering the professional orientation and skills development of migrant workers and students. In 2018, 37,428 migrants were enrolled as apprentices out of a total of 369,133 individuals (MLSP 2019) Lasting up to six months, apprenticeships are promoted by regions and provinces and implemented by contracted enterprises. Potential migrant workers may apply for these programs while still in their origin countries if they have knowledge of the Italian language and can obtain a permit of residence for study purposes, within the annual quota for migration, “*Decreto Flussi*.”

### 3.2.2. Recognition of qualifications and skills

In Italy, at the tertiary level, the recognition of foreign degrees is left up to the judgment of each university, leading to a fragmented approach and a lack of homogeneity. In cases when migrants would like to continue their studies at the university level, the same inconsistent approach exists. Universities usually publish information on their recognition process on their websites. Migrants must choose those universities that agree to recognize their qualifications.

The issue is more complicated for the recognition of certificates related to technical and vocational education and training (TVET) qualifications. Since, in Italy, the competence for this type of education is at the regional level, few migrant workers have the possibility to access TVET recognition processes. In contrast with tertiary education, the lack of homogeneity in this area has been exacerbated by the limited mobility of workers, including migrant workers.

It should be noted that recognition of secondary school qualifications is accessible only to EU citizens and to recipients of international protection.

The recognition process in Italy is influenced by the EU framework in this field (see box 3.1).

#### Box 3.1 EU systems for recognizing qualifications

##### Tertiary education

The recognition of higher education qualifications is regulated by two international treaties:

(1) The Lisbon Convention (1997)<sup>9</sup>

The treaty disciplines the modalities for *a formal acknowledgement by a competent authority of the value of a foreign educational qualification with a view to access educational and/or employment activities*. The implementation of the convention is done by the European Network of Information Centres in the European Region (ENIC), which cooperates closely with the EU network of National Academic Recognition Information Centres (NARIC).

(2) Bologna Process (1999)<sup>10</sup>

Under the initiative of the Council of Europe, the Bologna Process aims at facilitating skills mobility using tools like the European Credit Transfer and Accumulation System (ECTS) and the Diploma Supplement. A full-time student would need to complete 60 ECTS per academic year, which represents about 1,500 to 1,800 hours of study. The Diploma Supplement provides detailed information on the studies successfully completed by the graduate.

##### Regulated professions

The recognition of qualifications and skills related to regulated professions is disciplined by Directive 2005/36/EC<sup>11</sup> on the recognition of professional qualifications.

Professionals in the European Union can move across borders and practice their occupation in other Member States. The directive covers all regulated professions, except those for which there are specific legal stipulations (seafarers, air traffic controllers, etc.).

<sup>9</sup> <https://www.coe.int/en/web/higher-education-and-research/lisbon-recognition-convention>.

<sup>10</sup> <https://ehea.info/>.

<sup>11</sup> The Directive was amended by Directive 2013/55/EU (see EU 2013).

### **Mobility of professionals**

The European Professional Card (EPC)<sup>12</sup> allows several professional categories, such as nurses responsible for general care, pharmacists, and physiotherapists to receive qualification recognition online in EU countries other than their own.

### **Vocational education and training**

The European Credit System for Vocational Education and Training (ECVET)<sup>13</sup> allows learning outcomes acquired in various contexts, both in other countries and through formal, informal, or nonformal learning, to be formalized and recorded. When a qualification is included in a VET certificate, a detailed description of the knowledge and skills acquired by the holders can be provided through a *Certificate Supplement*.

### **Migrant workers**

The EU Skills Profile Tool for Third Country Nationals<sup>14</sup> is a multilingual tool that can be used by organizations offering assistance to migrant workers, helping to map the skills, qualifications, and work experiences of the workers concerned and providing customized advice on further steps, for example, a referral for recognition of diplomas, skills validation, needs for further training, or employment support services.

*Sources:* Authors' elaboration of ILO Skills Module on BLMA (2020b and Grubanov-Boskovic, Mazza, and Belmonte (2021).

Italian legislation has introduced the Recognition of Prior Learning (RPL) as part of its labor market reform through Law No. 92/2012, the so-called “*legge Fornero*,” and bylaw No. 13/2013—pursuant to the EU Council Recommendation of 20 December 2012 (2012/C 398/01) on the validation of informal and nonformal learning in the Member States. The “*legge Fornero*” allows the harmonization of qualifications across the entire country, and was followed by the interministerial Decree of 30 June 2015, which established a mechanism of mutual recognition among the regional qualifications and skills; and procedures for the validation and certification of nonformal and informal learning. In order to have the new system operationalized, it was necessary to establish the National Qualifications Framework through the Interministerial Decree of 8 January 2018, in line with the European Qualification Framework (INAPP 2018). In the specific case of Italy, since the regions used to have their own qualification frameworks, there was a need to constitute a national framework to ensure the system’s homogeneity.

### **3.2.3. Occupational profiles**

The MLSP database on employment contracts in 2018 confirms that most jobs performed by migrant workers are of low and medium skill levels (see table 3.3).

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<sup>12</sup> See [https://europa.eu/youreurope/citizens/work/professional-qualifications/european-professional-card/index\\_en.htm](https://europa.eu/youreurope/citizens/work/professional-qualifications/european-professional-card/index_en.htm).

<sup>13</sup> [https://ec.europa.eu/education/resources-and-tools/the-european-credit-system-for-vocational-education-and-training-ecvet\\_en](https://ec.europa.eu/education/resources-and-tools/the-european-credit-system-for-vocational-education-and-training-ecvet_en).

<sup>14</sup> <https://ec.europa.eu/migrantskills/#/>.

**Table 3.3 Occupations of EU mobile citizens and migrant workers from outside EU, contracted in 2018 (some examples)**

| Occupational profile             | Migrant workers | EU mobile citizens |
|----------------------------------|-----------------|--------------------|
| Crop farm laborers               | 334,397         | 237,941            |
| Waiters                          | 101,042         | 56,760             |
| Home-based personal care workers | 96,227          | 75,058             |
| Domestic housekeepers            | 84,575          | 29,762             |
| Food preparation assistants      | 74,266          | 14,038             |
| Luggage porters                  | 60,088          | 15,397             |
| Cooks                            | 55,895          | 11,530             |
| Building construction laborers   | 45,561          | 21,464             |
| Bartenders                       | 20,713          | 12,078             |

Source: MLSP 2019

The data summarized in table 3.3 help explain the significant skills mismatch registered in 2018 by migrant workers: 69.3 percent of them performed jobs below their level of education, while the corresponding mismatch was 32.2 percent for national workers.

One of the main reasons for the large number of overqualified migrant workers may be the fact that their competences cannot be recognized because the existing normative framework is too complex and costly for them to access.

### 3.2.4. Skills anticipation

In Italy, skills anticipation encounters several challenges, namely:

- Employers have difficulties in identifying the skills they need over the medium term;
- There is a limited coordination of efforts to determine the skills needs at the national level;
- Training programs are not sufficiently flexible to address changes in skills demand in the medium term; and
- The structured forecasts, such as the continuous surveys of the Excelsior system,<sup>15</sup> do not cover agriculture and care work, sectors with high numbers of migrant workers.

In Italy, bilateral sector entities<sup>16</sup> consisting of employers' and workers' organizations continuously assess skills needs and provide training directly, as appropriate, at the sector level. These skills assessments do not forecast but rather analyze immediate skill needs and could be used to design adequate training programs in the short run, including for migrant workers.

As already mentioned, in the medium to long term, there are two kinds of skills forecasts available in Italy: one provided by the Excelsior system (see box 3.2) and one by CEDEFOP.

#### Box 3.2 The Excelsior system

The Excelsior information system was created by the Union of the Chambers of Commerce. Given that all private enterprises should be registered with the Chamber of Commerce, the Excelsior system can rely upon a large network of data sources: in 2019, this amounted to

<sup>15</sup> It should be noted that the medium-term forecast of the Excelsior system includes all economic sectors but domestic work.

<sup>16</sup> For example, EBNT for the tourism sector: <https://www.ebnt.it/>; EBAN for agriculture: <https://www.enteeban.it/>; FORMEDIL for construction: <http://www.formedil.it/>.

1,297,000 enterprises representing a total of 12,640,000 workers. Information entered into the system is cross-checked against compulsory forms filled in by employers and sent to the National Social Security System (INPS 2017).

Due to the characteristics of the Excelsior database, the analyses and forecasts provided do not include entities that are not registered with chambers of commerce (e.g., public administration institutions and agencies, nongovernmental organizations, and professional associations). The database does not include agricultural sector enterprises, due to the specificity of the occupational profiles.

Every month, the Excelsior system conducts a survey, through a detailed compulsory questionnaire, aimed at collecting information on occupational needs, recruitment channels, hard-to-fill vacancies, demand for migrant workers, and so on. The survey is based upon the Computer Aided Web Interviewing (CAWI) methodology and allows for an estimation of labor demand for the following quarter. The outcomes of the monthly surveys are used for the preparation of monthly and annual reports.

The annual report, integrated by the Italian National Institute of Statistics historical data series, allows the Unioncamere Excelsior System to make a medium-term forecast, over the next five years, of labor demand in Italy, including for foreign labor. The forecasting methodology is based upon a Vector Autoregressive model.

*Source: Unioncamere-ANPAL 2021b*

#### *The Excelsior medium-term forecast 2021–25*

The different variables and their relationships are elaborated using a Vector autoregression (VAR) statistical model. Based upon the broad database of the Unioncamere and the statistical historical series, the model has integrated the impact of the COVID-19 pandemic, which has been considered temporary.

Concerning expected labor demand, the Excelsior uses the CEDEFOP approach and considers the expansion of demand, or newly created jobs, separately from replacement demand.

Concerning GDP, the Excelsior model refers to ] government estimates published in April 2021 in the Economic and Financial Document (DEF) (MEF 2021a). This document foresees that after a decline of 8.9 percent in 2020, GDP will increase by 4.5 percent in 2021, 4.8 percent in 2022, 2.65 percent in 2023, and 1.8 percent in 2024. The assumption is that the pandemic is under control and the economy can resume being fully operational. These estimates are in line, for 2021, with those formulated by the International Monetary Fund (IMF 2021b), European Commission (EC 2021), and Bank of Italy (Banca d'Italia 2021), all of which use estimates between 3.0 and 3.5 percent. The Excelsior uses these parameters for preparing the forecasts according to a less optimistic scenario (scenario A) and a more optimistic one (scenario B).

Most of the jobs are estimated to be created as a result of replacement demand (almost 2.6 million jobs in total). The expansion demand is estimated at 933,200 in scenario A and 1,286,800 in scenario B. Many of the jobs will be created by the private sector and are foreseen in services, health and education, trade, and industry (see table 3.4).

**Table 3.4 Estimated expansion and replacement demand by sector, 2021–25**

| Sector                           | Expansion demand |            | Replacement demand<br>Scenario A-B |
|----------------------------------|------------------|------------|------------------------------------|
|                                  | Scenario A       | Scenario B |                                    |
| Agriculture                      | 9,200            | 29,000     | 100,600                            |
| Industry                         | 63,100           | 127,800    | 598,300                            |
| Trade                            | 34,700           | 60,600     | 337,400                            |
| Tourism                          | 82,500           | 186,600    | 113,800                            |
| Transport                        | 56,600           | 57,100     | 131,900                            |
| Media and TLC                    | 3,800            | 4,400      | 22,000                             |
| ITC                              | 79,900           | 93,500     | 33,100                             |
| Services to the enterprises      | 268,400          | 305,000    | 165,300                            |
| Education                        | 54,800           | 71,000     | 266,100                            |
| Financial services and insurance | -18,300          | -13,200    | 85,800                             |
| Health                           | 142,800          | 151,500    | 324,100                            |
| Culture and sports               | 66,400           | 88,300     | 50,600                             |
| Other services                   | 80,300           | 115,100    | 126,300                            |

Source: Unioncamere-ANPAL 2021b

The occupations that will likely be in demand in the future are displayed in table 3.5.

**Table 3.5 Estimated demand by occupational group, 2021–25**

| Occupations                                | Scenario A | Scenario B |
|--|------------|------------|
| Managers                                   | 50,500     | 54,600     |
| Professionals                              | 731,600    | 762,800    |
| Technicians and associate professionals    | 749,200    | 773,900    |
| Clerical support workers                   | 432,100    | 490,600    |
| Services and sales workers                 | 608,000    | 728,000    |
| Craft and related trades workers           | 328,200    | 371,500    |
| Plant and machine operators and assemblers | 209,300    | 225,600    |
| Elementary occupations                     | 326,200    | 362,200    |
| Armed forces occupations                   | 4,200      | 4,200      |
| Total                                      | 3,439,300  | 3,773,200  |

Source: Unioncamere-ANPAL 2021b.

Note: Estimates for the agriculture sector are not included.

The level of education in demand in the coming years is detailed in table 3.6.

**Table 3.6. Rate of education for future jobs under scenarios A and B (percentage)**

| Education level                   | Scenario A (%) | Scenario B (%) |
|-----------------------------------|----------------|----------------|
| Higher education                  | 33.1           | 31.6           |
| Secondary education               | 36.6           | 36.5           |
| TVET                              | 22.3           | 22.8           |
| No specific education requirement | 8.0            | 9.1            |

Source: Unioncamere-ANPAL 2021b

Note: TVET = technical and vocational education and training.

Concerning the future development of occupations in the agriculture sector, it is necessary to wait for the strategic plan that the Italian Ministry of Agricultural Policies, Food and Forestry has to adopt for the implementation of the new European Common Agriculture Policy 2021–27 (EC n.d.). This aims at enhancing agricultural productivity, tackling climate change and the sustainable management of natural resources, and promoting jobs in farming, agri-food industries, and associated sectors. The policy also pledges actions targeting the protection and integration of migrant workers in the sector. To support companies active in the agricultural sector affected by the COVID-19 outbreak, the Italian government has included in the legal decree “Care Italy” a fund of €100 million (Government of Italy 2020a).

#### *CEDEFOP 2018–30 long-run skills forecasts*

In 2018 the CEDEFOP issued a long-term forecast that covered projections for the whole of Europe for the period up to 2030. The model was replicated for each of the Member States. As for Italy, the forecasts have been updated for the period 2020–30.

The forecasts considered the global economic developments up to May 2017 in the European Union as a whole, and in each Member State. The assumptions were that the EU economy would see continuous but modest growth over the entire period, supported by increased household expenditure, reduced unemployment, and growing investments.

According to the CEDEFOP (2020) forecast, in Italy the jobs available up to a horizon of 2030 are mainly driven by replacement demand. Expansion demand is foreseen only for managers, professionals, and technicians and associated professionals. All other occupations might be affected by jobs lost, which appears more relevant for services and elementary occupations.

While the share of workers with medium-level qualifications remains stable at around 48 percent, the share of low-skilled workers is indicated as declining (see table 3.7). Further, the CEDEFOP forecast envisages a deficit of high-skilled workers that might be filled by medium-skilled ones. The reasons for the mismatch are often on the supply side of the education system, which produces skills not in line with labor demand (e.g., humanities instead of technical skills).

**Table 3.7 Share of jobs by level of qualifications in Italy and the European Union, 2022, 2026, and 2030**

| Year | Low qualification |       | Medium qualification |       | High qualification |       |
|------|-------------------|-------|----------------------|-------|--------------------|-------|
|      | EU-27             | Italy | EU-27                | Italy | EU-27              | Italy |
| 2022 | 18                | 27    | 48                   | 48    | 34                 | 25    |
| 2026 | 17                | 23    | 47                   | 48    | 37                 | 29    |
| 2030 | 15                | 19    | 45                   | 48    | 40                 | 34    |

## SECTION 4. LABOR MIGRATION POLICY

This section analyzes how competences for labor migration are shared among the public institutions in Italy and the role of various stakeholders involved, including social partners. The relevant legal framework has been presented and discussed in terms of the ways and means for ensuring regular migration pathways. A brief analysis of the migration entry system (quota system) has been included, as well as the existing mechanisms for labor market integration.

### 4.1. Institutional settings

Currently, the following actors are involved in the migration process in Italy. At the level of policy design, the competence on migration is shared among different ministries with some coordination, when appropriate (e.g., the Ministry of Interior and MLSP collaborate on the definition of the annual labor migration quotas). As for policy implementation, given the multilevel governance and the involvement of the regions and local authorities, the coordination is ensured by the National Coordination Board of the Ministry of Interior. The board is composed of representatives of the main line ministries (interior and labor), regions, local authorities, the United Nations High Commissioner for Refugees, and other organizations, as appropriate.

The **Ministry of Labour and Social Policies (MLSP)** is responsible for the negotiation, signature, and implementation of bilateral labor migration agreements (BLMAs). It contributes to the identification of domestic labor market needs, for the inclusion in the annual migration quota, indicating the number of foreign workers who can enter the country for seasonal, temporary, and permanent jobs. It has two implementing agencies: (1) the National Institute for Public Policy Analysis (INAPP, former ISFOL<sup>17</sup>), which covers vocational training; and (2) the National Agency for Active Labor Policies (ANPAL, former Italia Lavoro), which is responsible for the implementation of labor market policies, including migration-related initiatives.

Job mediation for nationals and migrant workers is carried out mainly by the Public Employment Services (PES) (ANPAL 2018) and private employment agencies (PrEAs). PES is managed by the regions, under the coordination of the MLSP. Migrant workers are eligible to apply for the active labor market measures that PES provides to national workers (counselling, training, job mediation). PES is the only institution that can provide migrant and national workers with a certification of unemployment that can entitle them to receive social benefits, such as unemployment allowance and free health care.

Based on the Legislative Decree No. 276 of September 10, 2003, the PrEAs should be licensed by the Ministry of Labour. Migrant workers can receive counselling, training, and job mediation, as appropriate. All services are paid by employers, with no charge for workers.

The **Ministry of Foreign Affairs** provides support for the negotiation and monitoring of BLMAs through its diplomatic network. It is also responsible for entry visa and family reunification. The ministry is active, through its implementing arm, the Italian Agency for Development Cooperation (AICS). The AICS has signed a Cooperation Protocol with the MLSP in 2018 for joint activities in partner countries. Based on the provisions of Law No. 125/2014 (MEF 2014), the AICS plans the involvement of diaspora associations in

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<sup>17</sup> Institute for the Development of Vocational Training of Workers.

Italy in the policy development process, following a bottom-up approach. As a result, there is a special project, called the “Summit Nazionale delle Diaspore,” which has been organizing a forum every year since 2017 with all relevant partners in the migration process, including diaspora organizations.<sup>18</sup>

The **Ministry of Interior** is responsible for dealing with irregular migration; the integration of foreigners, including migrant workers; and the identification, in collaboration with the MLSP, of domestic labor market needs for inclusion in the annual decree on foreign workers permitted to enter the country for work. It is also responsible for the implementation of procedures for asylum and the treatment of refugees. With regard to the integration process, it benefits from the support and advice of the diaspora associations in Italy.

The **Ministry of Education, University and Research (MIUR)** ensures that migrants and their families can have access to all education levels and provides language and support services for the effective insertion of foreigners in the education system.

The **Ministry of Agriculture** promotes the integration of migrant workers in the agricultural sector and regular employment, addressing the issue of forced labor and other abusive practices, such as the *caporalato*. The term *caporalato* refers to a very ancient system of organization of temporary agricultural work, carried out by laborers, organized into working groups of different sizes. A *caporale* is tasked with finding agricultural workers, taking them to the workplace, and directing them during the working activity. Currently, due to the economic crisis and the collapse of prices of agricultural products, the phenomenon of *caporalato* has shifted away from the honest work of labor brokers/recruiters/contractors (different terms apply depending on the organization of the workforce at the farm level), as in the past, to an activity associated with problems of labor exploitation (and trafficking at times) (Fondazione Metes 2019). To combat exploitation, the Ministry of Agriculture, in cooperation with the MLSP and support from the ILO, has adopted a specific National Action Plan (2020–22) (Ministry of Agricultural, Food and Forestry Policies 2013).

#### 4.2. Evolution of labor migration legislation

Italy is fully integrated in the international community and has ratified many of the ILO conventions, including those related to labor migration, namely the Migration for Employment Convention (Revised), 1949 (No. 97) and Migrant Workers (Supplementary Provisions) Convention, 1975 (No. 143) (ILO 1949, 1975).

The first systemic regulation on labor migration was done through Law No. 39 of 1990. Ever since, regulatory intervention has reflected the polarization of the political debate on migration between labor market needs and security issues. Therefore, while focusing on the creation of a system that could match the needs of the labor market, the legislation tries to prevent and reduce irregular migration, as a priority. Law 39/1990 established for the first time the yearly identification of labor market needs that allowed the competent authorities to issue working permits to migrant workers. The law also indicated that the condition of irregular migration was a crime and envisaged forced repatriation through administrative, and not judiciary, procedures.

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<sup>18</sup> See: <https://summitdiaspore.org/>

In the 1990s, this restrictive approach was adopted to respond to public concern over the frequent arrival of irregular migrants, especially from Albania, and the possible risks of the inflow increasing due to the collapse of the Soviet regime. This was also a concern of other EU Member States as the inclusion of Italy into the Schengen agreement would have provoked a flood of migrants into their territories.

Regardless of the restrictions introduced by the abovementioned law, migration flows continued. In order to manage the irregular migration from Albania, Law No. 563 of 1995 established some host centers along the Apulian coast for identification of migrants and further repatriation decisions, as appropriate. This approach still constitutes the basis of Italy's first reception system.

With legislative Decree No. 286/98, the Consolidated Migration Act was introduced, aimed at harmonizing the different norms on migration in a specific, coordinated text. The Migration Act has been continuously updated. With the Decree of the President of the Republic No. 394 of August 31, 1999, the regulation for implementation of the Migration Act was approved.

Law No. 40 of 1998, which enhanced the mechanisms for the planning of migratory flows, was integrated into national policy through a system of privileged quotas in favor of the countries that collaborated in the repatriation of immigrants expelled from Italy. This law, however, proved to be ineffective and irregular migration increased in the following years. Therefore, in 2002, a new Law No. 189, the so-called Bossi-Fini Law, tightened sanctions and made the expulsion procedures more rigid. It also launched a regularization campaign that was used by more than 650,000 migrant workers. As the flow of irregular migrants did not stop, a new regularization campaign was launched in 2006, involving more than 500,000 labor migrants.

During this period, the issue of asylum gained much attention at the European level and brought about the adoption of directives that Italy implemented through the adoption of specific decrees:

- Legislative Decree No. 140 of 2005 for the implementation of the Council Directive 2003/9/EC of 27 January 2003 laying down minimum standards for the reception of asylum seekers.
- Legislative Decree No. 251 of 2007 for the Council Directive 2004/83/EC of 29 April 2004 on minimum standards for the qualification and status of third country nationals or stateless persons as refugees or as persons who otherwise need international protection and the content of the protection granted.
- Legislative Decree No. 25 of 2008 for the Council Directive 2005/85/EC of December 1, 2005, on minimum standards on procedures in Member States for granting and withdrawing refugee status.

From 2009, Law No. 94 shifted the focus more toward the security aspects linked to migration. Thus, the norms on sanctions and expulsions were further tightened. In parallel, the labor market demand for migrant workers declined rapidly as witnessed by the annual "*Decreto Flussi*"<sup>19</sup> that fixed a need for less than 31,000 migrant workers per year from 2012 to 2016. This number included seasonal workers in the agriculture and tourism sectors, and the regularization of migrant workers already present in the country.

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<sup>19</sup> Every year, the Italian government identifies labor needs and issues two decrees, indicating how many migrant workers can enter the country for seasonal and nonseasonal jobs. Employers willing to hire migrant workers request for the issuance of work permits up to the quota established for that year.

Asylum seeking was seen by many migrant workers as an entry point to the country. In the period 2014–17, there were a total of 624,328 migrants. According to the Dublin Regulation,<sup>20</sup> the responsibility for the recognition of refugee status is with the country of first entry. In this regard, Italy is both a transit and a destination country.

The political debate and public opinions brought about the issue of Law No. 13 of 2017 that introduced faster procedures for decisions on asylum, resulting in an increased number of forced expulsions. Further to agreements with Libyan authorities, concluded in 2017, for preventing human trafficking, the flows of migrants dropped in 2018 to 23,210 and in 2019 to 11,439. With Law No. 113 of 2018 (the so-called Salvini Law), procedures for granting asylum have been made much more stringent.

### 4.3. The Italian quota system

Since 1990, Law 39/1990 established a mechanism for the yearly identification of labor market needs that could be addressed by migrant workers (quota).

The system is demand driven as it is based upon labor shortages identified by the Italian government. Each year the government (in particular the Ministry of Interior and the MLSP), defines the quota for labor migration that is included in a Prime Ministerial Decree (the so-called *Decreto Flussi*). The estimation is done using data from the ISTAT labor force and enterprises surveys conducted by Unioncamere (Excelsior). Additional information on labor market needs is collected from other line ministries, job centers, local authorities, and workers' and employers' organizations.

The system of entry quotas for migrant workers, which at first appeared to be an adequate approach for effectively managing migration admissions, has proven to be largely ineffective. In fact, the quotas did not allow for new migrant workers, as were used during the regularization campaigns for migrants who were already on Italian territory. It is important to note here that the entry quota does not apply to BLMAs, which are negotiated separately on a country-by-country basis.

### 4.4. Migrant workers' integration

Italy has established a well-developed integration system in order to address the growing demographic challenges, as well as ensure social cohesion. The Ministry of Interior plays a leading role in the integration process, in collaboration with the ministries of labor, education, and health.

#### ***Citizenship***

A powerful tool for the integration of migrants in the society of the destination country is offered by the possibility to acquire citizenship. Migrants can apply for Italian citizenship after 10 years of regular stay in the country. The duration is decreased to 5 years in the case of foreign nationals being granted the status of stateless persons or refugees and to 4 years for EU citizens. The acquisition of Italian citizenship is regulated under Law No. 91 of 1992 and implementing regulations No. 572/93 and No. 362/94 (Government of Italy 1992, 1993, and 1994).

#### ***Residence and work permit***

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<sup>20</sup> Regulation (EU) No. 604/2013 of the European Parliament and of the Council of 26 June 2013 establishing the criteria and mechanisms for determining the Member State responsible for examining an application for international protection lodged in one of the Member States by a third-country national or a stateless person.

Pursuant to European Directive 2011/98/EU, Legislative Decree No. 40 of 04 March 2014 has introduced the single work permit that allows foreign nationals to reside and work in the country to enjoy the same rights as national workers in the field of employment (working conditions, education and vocational training, social security, etc.).

Migrants who are resident in Italy for more than five years are entitled to apply for the EU residence permit. This permit allows them to be employed or self-employed in another EU Member State (Article 14 of the Council Directive 2003/109/EC) (EU 2003).

### ***Access of migrant workers to the Italian labor market***

Migrant workers with a regular residence permit have access to the Italian labor market. For this purpose, they can contact the local office of PES, the so-called Job Center (Centro per l'Impiego), to receive necessary assistance.

It should be noted that the recruitment channels in Italy, including for migrant workers, seem not to rely too often on PES services. As shown in table 4.1, employers prefer hiring workers directly or through informal channels such as recommendations from relatives and friends. This is particularly relevant in the case of employment in care services.

**Table 4.1 Recruitment channels preferred by Italian employers, 2019**

| Recruitment channel  | Percentage <sup>21</sup> |
|--|--------------------------|
| Public employment services   | 5.9                      |
| Private employment agencies  | 10.0                     |
| Curricula sent by potential workers  | 38.8                     |
| Agreements with schools, vocational centers, universities                                  | 8.9                      |
| Personal acquaintance  | 47.0                     |
| Internet   | 7.5                      |
| Suggestions from other enterprises   | 5.6                      |
| Informal networks (relatives, friends)   | 28.8                     |
| Other channels (e.g., trade unions, economic sector organization, ads in newspapers, etc.) | 12.3                     |

Source: Unioncamere-ANPAL 2019

The recruitment procedure for a regular migrant worker requires that the employer send a Mandatory Employment Notification form to the Job Center. The notification should fulfill all the statutory obligations, including those to the National Social Security Institute (INPS), the National Institute for Insurance against Accidents at Work (INAIL), and to the prefecture of the relevant province.

It should be noted that foreign citizens holding an entry permit for study reasons are allowed to work in Italy, provided that the contract envisages no more than 20 working hours per week and a maximum of

<sup>21</sup> The question on the mechanism chosen by the Italian entrepreneurs for recruitment of needed workers foresaw multiple answers.

1,040 hours per year. The permit for study reasons could also be converted into a working permit if the migrant has the necessary requirements and there is such possibility in the annual *Decreto Flussi*.

### **Social security**

A migrant worker who is regularly employed is subject to and can benefit from the social protection foreseen for national workers. S/he is entitled to pension and unemployment from the INPS, while the INAIL provides a coverage for risks linked to work accidents and occupational diseases. Women migrant workers are entitled to maternity leave via the INPS.

The portability of pensions is possible if Italy has a specific bilateral agreement with the origin country of the migrant worker (though few agreements of this type exist<sup>22</sup>). If such an agreement does not exist, and if the migrant worker is already entitled to an Italian pension, it is possible to transfer the payments abroad.

### **Health**

Regular migrant workers and their families living in Italy are entitled to the health care provided by the National Healthcare Service (SSN), with the same rights and duties as Italian citizens. In cases of medical emergency, irregular migrants also have the right to receive treatment.

### **Access of migrant workers to education and training**

Access to the compulsory cycle of education is a constitutional right for all resident persons, including foreign citizens. For migrants, access to secondary- and tertiary-level education is the same as for nationals.

Special attention is devoted to reducing language barriers through Italian language training organized by the state. Migrant workers can participate, free of charge, in courses aimed at the achievement of proficiency level A2 of the Common European Framework of Reference for Languages.<sup>23</sup> Training is organized by the Provincial Centers for Adult Education (CPIAs), under the responsibility of the MIUR.

Foreign citizens can also compete at the same conditions as nationals, for opportunities to pursue education, scholarships, student loans, and housing services offered by Italian public or private organizations.

### **Housing**

Article 5 of the Consolidated Law on Immigration and Article 35 of the Implementing Regulations establishes the obligation of the employer who is hiring a migrant worker to provide appropriate accommodation. The employer also has to pay for travel expenses in case of the repatriation of migrant workers. Such obligations are formalized in a specific Residence Contract, or included in the Mandatory

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<sup>22</sup> There are, among others, bilateral agreements with Bosnia and Herzegovina, Serbia, Capo Verde, and Tunisia. See the [complete list at: https://www.inps.it/nuovoportaleinps/default.aspx?sPathID=%3b0%3b45138%3b45346%3b45368%3b45369%3b45372%3b&lastMenu=45372&iMenu=1&iNodo=45372&p4=2](https://www.inps.it/nuovoportaleinps/default.aspx?sPathID=%3b0%3b45138%3b45346%3b45368%3b45369%3b45372%3b&lastMenu=45372&iMenu=1&iNodo=45372&p4=2).

<sup>23</sup> See the description of different levels of the Common European Framework of Reference for Languages (CEFR) at: <https://www.coe.int/en/web/common-european-framework-reference-languages/table-1-cefr-3.3-common-reference-levels-global-scale>.

Employment Notification form, signed before employment starts. The Residence Contract does not replace the employment contract.

#### 4.5. Bilateral labor migration agreements

The large inflow of migrants in the past years was addressed in two ways: (1) by establishing a national policy on regular migration and creating a normative framework for addressing irregular migration; however, this approach needed frequent adaptation; and (2) by activating the collaboration with main origin countries. As a result, the MLSP signed bilateral labor agreements with Egypt (2005), Morocco (2005), Albania (2008), the Republic of Moldova (2011), Sri Lanka (2011), and Mauritius (2012).<sup>24</sup> The objective of the BLMAs was mainly to prevent irregular migration, and did not encompass business and skills forecasting. The Italian government signed repatriation agreements with many origin countries, indicating ways and means for the return of irregular migrant workers (see box 4.1). Very few migrant workers came to Italy through BLMAs. Many migrant workers have come through irregular channels, and have been subsequently regularized. That is why BLMAs have had a limited impact on labor demand.

Concerning the repatriation agreements, beside the difficulties in identifying the country of origin (many of these migrants have no identity documents), the modalities and costs of repatriating such a large number of people reduced the effectiveness of the measure.

##### Box 4.1 The Egypt-Italy migration corridor

Egypt and Italy have a long tradition of cooperation and, following negotiations aimed at creating a channel for safe and regular labor migration, the countries signed two documents:

- (1) A bilateral labor migration agreement (BLMA), including an implementing protocol, dated November 28, 2005. The agreement envisaged in Article 5 the possibility of granting to Egypt an annual quota for regular migration to Italy of 7,000 work contracts per year, which was subsequently increased to 10,000 as of 2007. According to the agreement, “migrant workers enjoy the same rights and the same protection accorded to workers who are nationals of the receiving state, including social security, in accordance with the regulations of the receiving states.”

The BLMA was complemented by a memorandum of understanding (MoU), signed on May 17, 2011, aimed at providing effective mechanisms for the implementation of the 2005 Agreement. The MoU foresaw the creation of a local coordination office by the Italian Ministry of Labour to support the process of matching labor demand and supply within the BLMA. Detailed procedures were defined for the selection of candidates for labor migration. Article 6 refers to the language and vocational training of selected workers and stipulates that candidates will not bear any costs during the training process. Article 9 indicated the issuance of a three-year working permit by Italian authorities to Egyptian seasonal workers.

- (2) A readmission agreement, including an executive protocol, dated January 9, 2007, which fixed the modalities for the identification of the nationality of irregular migrants, and procedures and costs for their repatriation.

<sup>24</sup> These are the BLMAs that are still currently in force: [http://sitiarcheologici.lavoro.gov.it/AreaSociale/Immigrazione/flussi\\_migratori/Pages/default.aspx](http://sitiarcheologici.lavoro.gov.it/AreaSociale/Immigrazione/flussi_migratori/Pages/default.aspx).

The formal agreements between the two countries were complemented by two initiatives in the field of migration: (1) the creation of an integrated migration information system (IMIS), which lasted up to 2016; and (2) the Information Dissemination for the Prevention of Irregular Migration (IDOM) project aimed at preventing irregular migration through the provision of appropriate information (Ghoneim 2010).

The scope of IMIS was to create a web-matching mechanism for potential migrant workers and employers for filling job vacancies abroad. The practical impact of the tool proved to be limited due to internal and external factors (ETF 2012):

- (1) There were too many electronic tools for labor market matching, such as the migration databases of the Egyptian Employment Services (Semlali and Angel-Urdinola 2012) or the Flexi platform of the Italian Ministry of Labour and Social Policies, now replaced by a new platform, *Cliclavoro*,<sup>25</sup> which created parallel systems and additional workload.
- (2) The database was vast and detailed, but the competences of potential migrants were only self-declared by the jobseekers themselves. Though there was a Validation Unit, it only ensured that the missing data were provided, and it did not carry out quality checks.
- (3) Even when a group of potential migrants was selected by the Ministry of Manpower and Migration, very few Egyptian workers could come to Italy due to the time required for training and issuing a visa. There are no exact figures on the number of migrant workers who benefitted from IMIS and the BLMA.
- (4) The most important limitation was the fact that the overall quota for potential migrants was mainly used for the regularization of irregular migrants already present in Italy, thus leaving little or no space for additional migrant workers from Egypt.

Source: IOM Egypt 2016.

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<sup>25</sup> See <https://www.cliclavoro.gov.it/Clicomunica/News/2017>.

## SECTION 5. THE IMPACT OF COVID-19, AND LABOR MARKET & MIGRATION PROJECTIONS TO 2030

To control the diffusion of the COVID-19 pandemic, the EU Member States adopted extraordinary measures, including the lockdown of many economic activities and the adoption of border restrictions. To ensure the availability of goods and the functioning of essential services, the EU Commission issued specific guidelines aimed at facilitating the movement of workers operating in essential services (EU 2020). Migrant workers have an important role in the necessary functioning of essential services (see box 5.1).

### Box 5.1 The role of migrant workers in Europe during the COVID-19 pandemic

Many European countries were forced to adopt lockdown measures, keeping only essential services such as health and food chains functioning. Key workers performed those crucial tasks. The main categories of key workers in the European Union (EC 2020b) are: teaching professionals (14.5 percent), skilled agricultural workers (11.9 percent), science and engineering associate professionals (11.1 percent), personal care workers (10.3 percent), and cleaners and helpers (9.9 percent). Some of the key occupations are clearly female dominated: personal care workers, cleaners and helpers, health-associated professionals, teaching professionals, health professionals, and personal service workers. On average 13 percent of key workers are migrants. In some occupations, for example, cleaners and helpers, and laborers in mining and construction, up to a third of key workers are foreign born.

This implies that migrant workers are playing a critical role in helping European countries deal with the crisis. These workers also include low-educated migrants, who are scarcely considered in migration policies, which focus almost entirely on attracting high-skilled migrants.

*Source: Fasani and Mazza 2020.*

The Italian government imposed a national quarantine and declared a state of emergency on March 9, 2020 (Government of Italy 2020b), restricting the movement of the population, except in cases of necessity, including certain types of work, and health emergencies. The lockdown restrictions included the temporary closure of nonessential shops and businesses.

As expected, the lockdown had an immediate negative impact on many economic sectors. The medium- and long-term effects need to be further analyzed, considering the structural challenges that the Italian economy had already been experiencing before COVID-19, as well as the impact of the pandemic on Italy's relations with its main trading partners.

### 5.1. An overview of the impact of COVID-19 at the end of the lockdown

The main economic sectors affected by the lockdown were tourism, hospitality, catering, retail, entertainment, and transport. Many industries in the automotive and mechanics sectors have met increasing difficulties due to the restrictions on export, and challenges related to the procurement of components that are manufactured in China.

In general terms, the overall production level was reduced by 16.6 percent in March 2020, reaching 1978 levels (Confindustria 2020). The impact on employment was acute, even if softened by the social safety nets such as the Wages Guarantee Fund (CIG), and unemployment benefits. ISTAT has calculated that there were about 8 million workers in the activities frozen during the lockdown, the majority of which were from industrial sectors. Of these, only 4.5 million were permanent employees; 1.1 million were temporary workers and 2.2 million were self-employed.

It is not possible at the moment to estimate the impact of the pandemic on informal employment. Of the estimated 3 million workers in the informal economy in Italy, the majority are employed in tourism, hotels and restaurants, and construction, many of them migrant workers.

## 5.2. COVID-19 measures adopted by the Italian government with effects on migrant workers

### ***Legal Decree No. 18 of 17 March 2020(Care Italy)***

The law provided support in the amount of €25 billion along four main lines:

1. Increasing resources for the health care system for prevention, mitigation, and containment of the epidemic;
2. Protecting income and work, and widening existing social safety nets to all companies forced to limit or stop business due to COVID-19;
3. Supporting the liquidity of businesses and households, by deferring the social security contribution deadlines, and strengthening the Central Guarantee Fund for small and medium enterprises (SMEs);
4. Providing aid to the most affected sectors, such as tourism, hotels, transport, catering and bars, culture (cinemas, theaters), sports, and education.

Migrant workers were eligible for social protection and SMEs were guaranteed loans.

### ***Legal Decree No. 33 of 16 May 2020—“Relaunch”***

The law foresaw measures costing €55 billion. The main interventions for which migrant workers were eligible for included:

- *Emergency income.* The new measure foresees a subsidy from €400 to €800 for all persons, including regular resident foreigners, with a low annual income (less than €15,000), excluded from other benefits.
- *Formalization of informal workers in the sectors of agriculture and care.* This applies also to foreign workers who can prove their residence in Italy before March 8, 2020, in the specific sectors mentioned before. If they are in an irregular position, with the foreseen procedures, they will receive a residency permit.
- *Temporary residency permits.* For irregular migrant workers working in the agriculture, domestic, and personal care sectors who have lost their jobs, a six-month temporary permit will be issued, allowing them to look for new employment.

In the second half of 2020, the government adopted a selective lockdown policy together with measures aimed at lessening the impact of the crisis on workers and employers. In particular (1) the August 2020 legal decree,<sup>26</sup> (2) the “Ristori” decrees of 2020,<sup>27</sup> and (3) the “Sostegni” decrees of 2021.<sup>28</sup> The total investment in the extraordinary measures adopted during the COVID-19 pandemic amounted to around €180 billion, equivalent to 11.8 percent of GDP.<sup>29</sup>

The adopted measures were necessary to address the emergency situation, yet more interventions will be necessary for addressing structural problems and reorienting the industrial policy in a changing worldwide economic environment. These interventions require an extended political consensus and additional financial resources.

The government was also working on the adoption of measures that can help the country to restart after the crisis using the opportunities offered by the European Union (e.g., through the Next Generation EU) for modernizing the economy of the country along specific strategic lines. In this context, the National Recovery and Resilience Plan (PNRR) will mobilize more than €240 billion including EU and national funds, and will focus on six main axes (see box 5.2).

#### Box 5.2 The National Recovery and Resilience Plan (PNRR)

1. **Digitization, innovation, competitiveness, and culture:** modernization of public administration and the production system through digitalization; systemic reforms (such as justice and public administration) and investments in tourism and culture.
2. **Green revolution and ecological transition: the energy efficiency and requalification of buildings; the energy transition; sustainable local mobility; protection and enhancement of land and water resources; green business and the circular economy.**
3. **Infrastructure for sustainable mobility: high-speed rail and road maintenance, and the competitiveness and environmental sustainability of the port system.**
4. **Education and research: the enhancement of skills, including** teaching; science, technology, engineering, and mathematics, (STEM); and multilingualism; also, the application of research findings to business opportunities.
5. **Inclusion and cohesion: employment policies,** a structural reform of active measures, and strengthening of public employment centers targeting young people, women, and vulnerable groups.
6. **Health care: improving** health services and modernizing the technological equipment of the national health system.

Source: MEF 2021b.

<sup>26</sup> Reinforcement of the measures already approved with previous Care Italy and Relaunch laws and inclusion of tourism and cultural economic activities among those covered by fiscal and financial support measures.

<sup>27</sup> Ensuring continuous funding for the support measures already existing and adding new ones (e.g., tax deferral, contribution for covering rental costs).

<sup>28</sup> A total of €72 billion for financing existing support measures and partially for development projects that cannot be funded by the EU funds.

<sup>29</sup> It should be noted that the EU Stability Pact, temporarily suspended due to the COVID-19 pandemic, fixed at 3 percent of GDP the maximum debt per year.

In the first half of 2021, the pandemic has continued and the vaccination campaign has met with some delays. The expected rebound of GDP from -8.9 percent at the end of 2020 to an estimated 7.3 percent in 2021 would be difficult to achieve. In Italy, the employment rate (full-time equivalent, FTE) is estimated to diminish by 9.8 percent in 2020 and rebound to 5 percent in 2021. According to the United Nations (2020), the burden of the crisis is on the most vulnerable in the labor market: youth, older workers, migrant workers, and workers in the informal economy. Particularly challenging are the conditions of irregular migrants. While for regular migrant workers, the government has foreseen the extension of social safety nets, for the irregular migrants there is no temporary support. The measures are still to be defined and will require time for their implementation. The most urgent survival needs are partially taken care of by charities and nongovernmental organizations. Despite the massive intervention of the government in reducing the impact of the crisis on the labor market, ISTAT registered in the last year a loss of 945,000 jobs (-2.2 percent). This number includes 590,000 employees and 355,000 self-employed. Many of them (717,000) became inactive, probably discouraged by the lack of job opportunities. As a result, the inactivity rate increased by 5.4 percent (ISTAT 2021a). Currently, there are two main scenarios based on assumptions and estimations, formulated by the European Union and the European Bank (BCE) (EC 2020a), the Bank of Italy (Banca d'Italia 2021), and the Italian government (MEF 2021a).

### ***COVID-19 development option 1***

The DEF 2021 envisages an increase in GDP of 4.5 percent in 2021, 4.8 percent in 2022, 2.6 percent in 2023, and 1.8 percent in 2024. In this scenario, provided that the pandemic is definitively over, Italy could come back to its pre-COVID GDP levels in 2022. The estimates of the Italian government are in line with the World Economic Outlook's (IMF 2021a) provisions of +4.2 percent for 2021 and of 3.6 percent in 2022. For the following years, the implementation of the PNRR could have an estimated impact on GDP of +3 percent annually. This will help reduce the public debt to the limits prescribed by the EU norms.

In Option 1, the tourism sector might become fully operational from summer 2021, recovering partially. The possibility to travel again in Europe through the adoption of the Green Vaccination Passport could allow the presence of foreign clients in many tourist destinations like Rome, Florence, Venice, and so on. This new perspective will influence employment possibilities in a sector that includes many migrant workers.

The construction sector is also restarting with completion of public works and building sites that were frozen during the lockdown. On April 16, 2021, the Ministry of Infrastructures and Transport appointed specific commissioners to take charge of carrying out the start-up or completion of 83 major infrastructure projects that will ensure an additional average annual employment of 68,400 FTE till 2030 (Ministry of Sustainable Infrastructure and Mobility 2021). The government has provided incentives for the restructuring of private buildings through its legal decree Relaunch. In this sector, the presence of migrant workers is very significant, as in agriculture. Agriculture had been only partially affected due to the need to preserve food supply chains.

### ***COVID-19 development option 2***

A second, less-optimistic development, envisages the impact of the pandemic to be more serious than expected. An analysis conducted by ISTAT (2021c) on the productivity of enterprises foresees that more

than one-third of them might not reopen or survive, not only because most of the Italian economy is made of small and micro enterprises, but also due to the lack of appropriate strategies for dealing with the crisis. To assess the capacity of the Italian enterprises to deal with the COVID-19 generated crisis, ISTAT (2021c) has screened enterprises with at least three staff members, using the predictive model Receiver Operation Characteristics (ROC). As a result, the screened universe has been divided into four groups:

(1) Enterprises at structural risk, exposed to exogenous crises. This segment represents 44.8 percent of the total enterprises and 20 percent of employment.

(2) Vulnerable, not immediately at risk, but could be confronted with challenges in dealing with crises. This group is made of 15.2 percent of the total enterprises and represents 9.4 percent of total employment.

(3) Resilient, made by 19.0 percent of enterprises that have already adopted strategies to deal with the changing environment (e.g., differentiating products, adopting e-commerce techniques, etc.). They account for 17.9 percent of total employment.

(4) Robust, already well equipped for dealing with the crisis. This group is smaller and represents only 11.0 percent of enterprises, but 46.3 percent of total employment.

### 5.3. Labor demand post COVID-19

There are no indications at the moment on the occupational profiles that will be demanded in the coming years. The only existing forecasts are the Excelsior system (up to 2025) and CEDEFOP (up to 2030); however, the CEDEFOP projections have not yet taken into account the impact of COVID-19. At the global level, the ILO estimated that through the year 2020 there was a global decline of 255 million full-time jobs due to COVID-19 (ILO 2021).

The Excelsior system registered in March 2021 the intention of employers to recruit 292,010 workers, with a projection of 923,410 recruitments for the quarter March–May 2021 (Unioncamere-ANPAL 2021a). This figure is not subdivided by national and migrant workers. The recruitment is foreseen to cover two-thirds of the service sector (62.3 percent) and the rest will be in the industry sector (agriculture has not been included). The main occupations in demand are summarized in table 5.1. The recruitment is foreseen at 46 percent through fixed-term contracts, and 27 percent through indefinite duration contracts and other forms of collaboration.

**Table 5.1 Expected recruitment in March 2021 by occupation**

| Occupations                                | Expected recruitment |
|--|----------------------|
| Managers                                   | 580                  |
| Professionals                              | 21,590               |
| Technicians and associate professionals    | 42,580               |
| Clerical support workers                   | 27,440               |
| Services and sales workers                 | 54,080               |
| Craft and related trades workers           | 59,050               |
| Plant and machine operators and assemblers | 46,560               |
| Elementary occupations                     | 40,120               |
| Total                                      | 292,010              |

Source: Unioncamere-ANPAL 2021a.

The Excelsior projections up to 2025 consider the changes in the labor market that will be driven by the PNRR, especially in the green economy and due to digitalization. These two sectors will have an impact on

occupation profiles, both envisaging new competences in existing professions and the creation of new ones.

The analysis of the Excelsior system is confirmed by the survey of the World Economic Forum (WEF 2020) (see box 5.3). The identification of future demand for specific occupational profiles will be useful in designing or adapting the national labor migration policies and defining the annual migration quotas.

| <b>Box 5.3 World Economic Forum (WEF) 2020—The Future of Jobs</b>  |   |
|--|---|
| <p>The COVID-19 pandemic obliged companies to change their strategies by (1) accelerating the digitalization of work processes (e.g., use of digital tools, video conferencing); (2) giving employees more opportunities to work remotely; (3) accelerating the automation of tasks; (4) accelerating the digitalization of upskilling/reskilling (e.g., education technology providers); and (5) accelerating the implementation of upskilling/reskilling programs.</p> <p>Concerning the occupation profiles in the changing environment determined by the COVID-19 pandemic, the WEF survey identifies those that are in growing demand, including new ones, and those that will be increasingly redundant by 2025:</p> |   |
| <p><b><i>Emerging occupation profiles</i></b></p> <ul style="list-style-type: none"> <li>AI and machine learning specialists</li> <li>Internet of things specialists</li> <li>Data analysts and scientists</li> <li>Digital transformation specialists managers</li> <li>Assembly and factory workers</li> <li>Project managers</li> <li>Process automation specialists</li> <li>General and operations managers</li> <li>Big data specialists</li> <li>Application engineers</li> </ul>   | <p><b><i>Declining occupation profiles</i></b></p> <ul style="list-style-type: none"> <li>Data entry clerks</li> <li>Administrative and executive secretaries</li> <li>Accounting, bookkeeping, and payroll clerks</li> <li>Business services and administration</li> <li>Assembly and factory workers</li> <li>Accountants and auditors</li> <li>Human resources specialists</li> <li>Financial and investment advisers</li> <li>Electronics and telecommunications installers and repairers</li> <li>Credit and loans officers</li> </ul> |
| <p><i>Source:</i> WEF 2020.</p>  |   |

In agriculture, a large percentage of workers are seasonal. The Italian agriculture association Confagricoltura estimated that some 250,000 workers would be necessary for harvesting, picking fruits, and vineyard maintenance (Confagricoltura Toscana 2020). No detailed estimates are available on the impact of the antipandemic measures on migrant workers; however, the lockdown and closure of borders in response to COVID-19 and the restrictions to the mobility of migrant workers create difficulties for many economic sectors, in particular to the agriculture sector. The quarantine that the Italian government introduced in July 2020 for Bulgarian and Romanian citizens has also had an impact on the availability of seasonal workers in agriculture and domestic care.

## SECTION 6. POLICY CONCLUSIONS AND RECOMMENDATIONS

The key ILO recommendations for migrant workers and the COVID-19 response (ILO 2020) focuses on the following areas:

*a) Inclusion of migrant workers in national COVID-19 responses*

As mentioned in the previous section, migrant workers have been included in national measures (e.g., the legal decrees “Care Italy” and “Relaunch”) that aim at preserving the livelihood and social benefits of workers, including migrant workers. Yet, there is still a need for further measures during the recovery phase to facilitate labor market integration in general, and for migrant workers in particular.

*b) Ensuring migrant workers have regular status or do not fall into irregular status*

In Italy, a specific measure was envisaged for the formalization of irregular migrant workers operating in the agriculture sector and in care services. As for the migrant workers in other sectors, the current measures have frozen the possibility of dismissing workers in general till end of June 2021. There is a risk that they might fall into unemployment afterward.

*c) Policies based upon social dialogue and full involvement of employers’ and workers’ organizations can foster inclusion of migrant workers in national responses*

Many consultations with social partners have been organized by the Italian government (Prime Minister and MLSP) for the preparation of labor policy measures to be adopted during the COVID-19 emergency. Tripartite consultations were held for the identification of essential economic activities and services to be exempted from the lockdown. In addition, on March 14, 2020, a tripartite agreement was signed on measures to combat and contain the spread of the COVID-19 virus in the workplace. The agreement, further updated on April 24, was included in a Decree of the President of the Council of 11 June 2020 (Government of Italy 2020c).

### 6.1. Policy recommendations over the short term

There is a need to make a concerted effort to address informal work, which heavily affects migrant workers. It is suggested that the current legal decree “Relaunch” be extended to all sectors, beyond agricultural and domestic work. The legal decree enables irregular migrant workers working in the agricultural and domestic work sectors and who had lost their jobs due to COVID-19 to receive a temporary work permit of six months. This period should allow them to find a job; however, the issue of their status will still remain at the end of the six months. Considering the weak labor market demand in this period, the duration of such work permits might prove too short for finding new employment, except in agriculture. It is therefore suggested that the validity of the permit be extended for up to one year. For migrant workers exposed to the risk of unemployment, special measures for the renewal of work or

residence permits can also contribute to ensuring access to essential services, avoiding an increase in irregularity.

According to data from the Ministry of Interior, the applicants to the regularization program have been 207,542 in total: 85 percent of them were domestic workers and 15 percent agricultural workers. There were only 12,986 applications for a residence permit for the purpose of seeking employment.

Considering that undocumented migrants are estimated to be around 517,000 (Fondazione ISMU 2020), it might be helpful to consider the extension of the regularization program to other sectors in which the presence of migrant workers is relevant, such as the construction, transport, and hospitality industries. The modality for the implementation of this program might be reconsidered since migrant workers have no role in the regularization—only employers can initiate the process of regularization. For the agriculture sector, due to the presence of intermediaries (“*Caporalato*”), the employers do not always have a direct relationship with the migrant worker. Therefore, special attention has to be given to preventing the risk of fraud and exploitation.

Special attention has also to be devoted to poverty alleviation measures as the pandemic is affecting a large component of Italian society, with the families of migrant workers more likely to be hit harder. The introduction of an “emergency income” (REM: Article 82 of Decree Law 33/2020) is a good initiative; however, more structured and long-lasting measures need to be put in place.

The effective recognition of qualifications is usually linked to a formal contractual relationship. It is for this reason that skills matching is traditionally only discussed in the context of formal employment. If migrant workers have access to skills recognition, they often have higher chances of obtaining formal employment. For this reason, it is necessary that specific skill development measures be designed and implemented, such as strengthening distance and e-learning, specifically targeting migrant workers. The fact that migrant workers need to work to maintain themselves and their families often forces them to engage in the informal economy, where they work in poor and unsafe conditions and are often exploited.

It is important to note that situations of abuse are not limited to irregular migrants. Migrants often present various levels of vulnerabilities, namely a weak social network, lack of adequate language proficiency, and limited knowledge of the institutional and labor market context.

Positive results could be achieved by conducting awareness-raising campaigns targeting migrants—but also employers and the society as a whole—regarding the human, economic, and social costs of undeclared work. These types of initiatives could also have a positive impact on national workers, as informality affects both Italian and foreign workers. These campaigns need to be designed in such a way that they successfully reach migrant workers, resulting in the effective use of public funds.

When it comes to regular migrant workers, integration services and measures have been well developed in Italy. The PES has the competency to implement such actions, which have been used to varying success by migrant workers due to administrative obligations, for example, the need for confirming employment/unemployment status. In 2019, 6.5 percent of regular migrant workers used job counselling, 0.3 percent received a job offer, and 0.5 percent benefited from regional training opportunities (MLSP 2019). There is a need to further raise awareness about the employment services offered, and diaspora organizations could play a facilitating role in this regard.

It should be noted that there is a regional approach to labor market integration measures, in particular when it comes to skills development and skills recognition, though not at the tertiary level. The Italian National Qualification Framework, adopted in 2018, is the guiding tool which regions are currently using for implementing skills matching measures. This regional approach allows for flexibility and for better matching with the effective skill needs of local labor markets and of different economic sectors. In this context, Italian bilateral sector entities could also play a role in terms of providing information on skill needs, as well as up-to-date training.

## 6.2. Policy recommendations over the medium and long term

The focus of labor migration policy in Italy has been on establishing a legal framework, which considers labor market demands while addressing undocumented migration at the same time. The large inflow of irregular migrants and the frequent need for regularizations have confirmed that current Italian labor migration policies need to be further strengthened in order to fulfill these objectives. In the current COVID-19 context, the regulatory emphasis to cope with the changing economic and social developments in Italy and in origin countries, in terms of push factors for migration, needs to be further analyzed due to current data limitations.

The recurring and consistent gaps between the planned entry quotas and the existing labor shortages may be attributed to the insufficiency of the current labor needs forecasting systems. The Excelsior Survey is a reliable tool, and its forecasts are both short and medium term (one to five years). Other existing mechanisms, based upon current labor market demands, have proven to be ineffective because of the long lapse between the time the Italian employers submit their request and the migrant worker's actual recruitment and job placement. This is linked to the finalization of migration procedures.

The skills forecasting carried out at the EU level provides general indications of labor market needs; however, it does not provide occupation-specific details, which could potentially orient skills matching for managed labor migration purposes. There is a need to design and implement a medium-term skill forecasting system, covering all sectors, including agriculture and care work, at the national level. This should be done in close cooperation with the social partners and other key stakeholders and allow for better coordination of training programs to respond to medium-term needs too.

Furthermore, the existing system for vacancy placement at the EU level—EURES<sup>30</sup>—is open only to the European Economic Area countries. Unfilled vacancies are not therefore accessible to third-country nationals. This has resulted in extremely limited opportunities for regular labor migration and inadequate skills matching from countries outside of the European Union. There are several pilot experiences, yet they have not been translated into a systemic labor migration policy response.

The issue of over- and underqualification affects both national and migrant workers, and it is a structural problem that could be also addressed through collective bargaining. In the future, the changing productive modalities might need a different skill set for national and migration workers. In this regard, the MLSP, in collaboration with regions, could launch programs for updating and reorienting skills, to be carried out in specific TVET centers. These programs could be potentially co-financed by the European Social Fund.

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<sup>30</sup> EURES (European Job Mobility Portal of the European Commission) is available at: <https://ec.europa.eu/eures/public/homepage>.

The need for seasonal workers and the supply of qualifications and skills for hard-to-fill vacancies could be addressed through adapting the existing BLMAs or designing new ones. Such efforts could also tackle the high rates of informality among seasonal migrant workers. Particularly important is the identification of modalities for ensuring that labor migration is effective and corresponding to the clauses of the BLMA that have to include provisions for the protection of migrants' rights, at all skill levels. Further, the agreements should have built-in incentives for migrants' reinsertion into the domestic labor market upon completion of their work abroad. There should be a clear division of tasks and responsibilities among the institutions involved, so that implementation can really take place.

As the quota system proved not effective in addressing the needs of the labor market, as already discussed, a possible solution could be offered by the instrument of BLMAs. The agreement with the origin countries could indicate the skills on demand and detail the recruitment modalities, including assessments of migrant workers' competencies. Once they identify the skills and qualifications, the BLMAs could envisage that specific training initiatives are organized in origin countries, including predeparture language and occupation-specific training. Another option could be to prepare migrant workers for specific occupations, where training could be envisaged in the origin countries, with practical training taking place within enterprises in Italy. Timing is very important in order to address employers' needs.

In general, the Italian approach to BLMAs has been to develop together rather than impose cooperation in the area of labor migration. That is why vocational education and training have been at the center, as well as very close collaboration with employers to understand their needs. An area that proved to be challenging is the identification of priority sectors in origin countries, which will be the basis for joint activities. Then, based on the selection, vocational education and training will be provided, based on real labor market needs at home and abroad.

At the same time, it should also be noted that the assessment of experiences in migrants' countries of origin has enabled the Italian authorities to come up with improved functional mechanisms for the implementation of skills matching arrangements. The creation of a database of potential migrant workers in Egypt (IMIS Plus) demonstrates how difficult it is to successfully manage a large dataset due to the lack of monitoring mechanisms on the information entered; for instance, there was no way of verifying the skill levels of the applicants. One way to overcome these difficulties is to invest in the creation of networks between the countries of origin and destination to facilitate the design of relevant labor migration policies. Another solution would be to involve education and training institutions in countries of origin, and/or develop skills assessment and recognition procedures (Recognition of Prior Learning, RPL) in countries of origin and countries of destination.

There is a need to coordinate between the Ministry of Labour and the Ministry of Foreign Affairs when it comes to the design and implementation of BLMAs. The challenge for the Ministry of Labour is that it does not have offices abroad, while the Ministry of Foreign Affairs works abroad through the offices of the Italian Development Cooperation Agency and the diplomatic network.

When piloting skills matching initiatives between Italy and origin countries, there should be a sustainable approach—otherwise the impact could be limited. Attention should focus on building on existing project results and institutions, rather than on starting completely new initiatives to ensure continuity and sustainability. There has already been considerable investment in both human and financial resources in many origin countries, and even though some of it might have been lost—due to high turnover in the public sector for instance—the effort should concentrate on reinforcing the existing institutions and

capacities. It is necessary to strengthen the implementation of lessons learned and good practices at a systemic level.

It should also be noted that the current Italian migration policy places a special emphasis on involving the diasporas in order to facilitate integration. The idea is that this type of cooperation could also facilitate skills and job matching through information sharing. It would also be good to consider involving the diaspora in the BLMA preparations.

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