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Institutional contexts of employers' use of irregular migrant labour: Evidence from five European countries

21 February 2026

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Abstract

The employment of irregular migrants – defined as migrants without the legal right to reside – has become a significant political and social concern across Europe. Yet the drivers of employers' reliance on irregular migrant labour remain poorly understood. To address this gap, this paper theorises and examines empirically the role of employers in diverse institutional contexts. We ask why employers use irregular migrant workers and how this use is influenced by national labour market and welfare institutions. Our empirical analysis draws on original data comprising 137 qualitative interviews and more than 500 survey responses from employers in four sectors – agriculture and food processing, restaurants, older adult care, and waste management – across five European countries (Austria, Italy, Poland, Sweden, and the UK). The findings show that specific features of labour market and welfare institutions – such as lenient regulations on employment agencies, entrenched informal work practices, and under-funded public care systems – can significantly influence employers' reliance on irregular migrant workers. These institutional effects can operate both independently and in interaction with immigration policies. Notably, where labour and welfare systems foster strong demand for migrant labour, but immigration policies provide no or only highly restricted legal employment options, the likelihood of irregular employment increases. By demonstrating how institutional contexts structure employers' options and incentives, our results refine prevailing 'actor-based' explanations that attribute irregularity primarily to the interests and behaviours of employers, migrants, and labour market intermediaries.

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1. Introduction

Irregular migrants, defined as migrants without the legal right to reside in their host countries, play a significant role in European labour markets. Of the estimated 3-4 million irregular migrants in Europe (Kierans and Vargas-Silva 2024), the majority is thought to work in lower-waged job in sectors such as agriculture, social care, construction, and hospitality (Spencer and Triandafyllidou 2020). Some of this is "essential" work integral to economic and social resilience to external shocks such as the Covid-19 pandemic (Anderson et al., 2021). Despite the prevalence and embeddedness of irregular migrants across European labour markets, we have limited understanding of the drivers of employment of irregular migrant labour, and of how and why this might vary across and within countries. In particular, the role of employers remains under-researched. Existing research on irregular migrant workers has largely focused on the conditions of migrants and/or the role of states and policies in creating and responding to irregularity in migration and employment (e.g. Ambrosini and Hajer, 2023). At the same time, research on the role of employers in labour migration has largely focused on employer demand for migrants with regular status (e.g. Kubiciel-Lodzińska and Maj, 2017; Ruhs and Anderson, 2010). This knowledge gap does not only matter for research; irregular migration has high political and social salience in many European countries (e.g. Geddes and Pettrachin, 2020; Ahlberg and Granada, 2022). To respond to public concerns (e.g. Gschwind et al, 2025) and to reduce vulnerabilities and exploitation in irregular migrant labour markets (e.g. Cases et al., 2026), it is necessary to understand better why some employers use *irregular* migrant workers specifically, and how and why this might vary across and within countries.

This paper contributes to the development of a theoretical framework and provides empirical analysis to explore why employers use irregular migrant labour and, in particular, how employers' use of irregular migrants is shaped by the national institutional context. We focus on two broad types of socio-economic 'institutions' of a country: national labour market regulations and welfare policies. These national institutions include sector-specific policies and frameworks (e.g. the regulatory framework for social care). There is a long-standing and large research literature on how institutions shape and constrain the actions and incentives of labour market actors including employers (e.g. Wood and Wilkinson 2014). There is also a smaller but growing literature on how institutions influence employers' demand for migrant labour (e.g. Marino and Keizer, 2023; van Hooren, 2012) and contribute to the considerable variations in the share of migrants employed across European sectors and countries (Broberg et al, 2024). To the best of our knowledge, however, this is the first paper to explore the role of institutions in shaping employers' use of *irregular* migrant workers.

To address this question, we analyse employers' perceptions and use of migrant workers across five European countries with different labour market and welfare institutions (Austria, Italy, Poland, Sweden, and the UK) and across four sectors that are characterised by fundamental differences in the nature of the product/service provided and in their regulatory frameworks (agriculture and food processing, restaurants, older adult care, and waste management and recycling). These institutional differences between countries and sectors allow us to explore whether and how the institutional context matters for employers' use of migrant workers with different types of legal status. Our analysis is primarily based on 137 qualitative interviews conducted in 2024-2025 with employers across these five countries and four sectors. We also draw on the results of an online survey of employers that we implemented in the same countries and sectors. As the response rates were generally low and highly variable across countries, we use this survey data mainly to supplement the analysis of the qualitative interviews.

A starting point of our research is that employers' use of irregular migrant workers cannot be understood without considering employer demand for migrant workers more generally: as will be discussed below, legal status is complex and not a black and white matter. Consequently, our employer interviews focused on employers' perceptions and use of migrant workers with different types of migration status. This approach helped us engage employers in a discussion of irregularity in migrant labour markets, a sensitive and politicised topic which many employers are reluctant to talk about. Those we interviewed who were prepared to discuss irregular migrant workers preferred to talk about them in relation to 'other employers'. Given these sensitivities and the (inevitable) limitations of any data collection on this topic, our empirical analysis necessarily remains exploratory.

Our findings indicate that national labour market and welfare institutions, alongside associated social norms and practices, can exert significant influence on employers' use of irregular migrant workers. These institutions shape employers' perceptions and migrant recruitment practices, both directly and in interaction with immigration policies. In particular, the likelihood of irregular migrant employment increases when immigration policies provide no or highly restricted legal employment options for migrants, and labour or welfare institutions generate employer demand for migrant labour. The latter could include, for example, a persistent lack of training systems for citizen workers, under-regulation of employment agencies, social norms permissive of informal working, and/or a persistent under-investment and structural reliance on low-cost labour in publicly funded sectors.

Our study makes at least three contributions to existing knowledge and research. First, current public and policy understandings of the use of irregular migrant labour are predominantly based on 'actor-based' explanations which attribute irregular migrant employment to the interests and behaviours of employers, migrants, and labour market intermediaries (e.g. Anderson and O'Connell Davidson, 2003; O'Connell Davidson, 2016). Our results refine and expand this explanation by emphasising the often-overlooked influence of institutional contexts. The results of our exploratory empirical analysis can be used to inform the further development of theory and future testing of refined hypotheses.

More generally, our new interview data and analysis advances research on the characteristics and determinants of the demand for migrant labour in high-income countries (Ruhs and Anderson, 2010; Boräng, 2018), thus contributing to larger research and policy debates on the characteristics, causes, and effects of the employment of migrants in European labour markets (e.g. Edo and Özgüzel, 2023; Glitz and Rapoport, 2023). Third, although focused on migrant labour, our study adds to broader research on how labour market and welfare institutions, and interactions between different types of institutions, shape the interests and behaviour of labour market actors (e.g. Hall and Soskice, 2001).

The paper is organised as follows. We begin, in section 2, by drawing on existing research to consider and develop expectations about how national institutions may affect employers' use of irregular migrant workers. These expectations provide a theoretical framework for our empirical analysis. Section 3 then gives an overview of our methods and the data we collected. In section 4, we present our key findings. The conclusion discusses the key contributions of our analysis to existing research, the potential implications for policy debates and policymaking, and avenues for further theoretical and empirical research.

2. National institutions and employer use of irregular migrant workers: What can we expect?

We define and understand 'institutions' to include both formal rules and policies – such as labour market regulations and welfare systems – as well as 'informal' institutions that include values, normative principles, and societal norms (cf. Streeck and Thelen 2005). National institutions include sector or issue-specific rules and values, e.g. the policies and norms that govern the provision of social care. A country's institutions are typically historically grown, socially embedded, and path dependent (e.g. Pierson 2000). As a consequence, although institutions can and do change, they tend to be relatively stable in the short run and provide the 'structural framework' within which actors develop their interests and preferences (cf. Fox-Ruhs et al, 2025). In the medium to long term, actors can influence/change institutions.

The primary focus in this paper is on how *national labour market regulations* and *welfare institutions* shape employer use of irregular migrant workers. We have to consider too the role of national immigration policies and related enforcement measures, which can also be considered part of the institutional context. Immigration policies play a key role in influencing the available migrant labour supply and, as we argue below, they interact with national labour regulations and welfare institutions to shape employer demand for migrant labour with irregular and other types of legal status. Given the highly politicised nature of immigration, national immigration policies tend to change more frequently than labour market and welfare institutions which typically provide a more stable and longer-lasting institutional context within which employers, migrants and other actors pursue their interests.

We also need to be clear about our definition and understanding of 'irregular' status. In line with most research, we consider a spectrum (rather than binary) of irregularity in the legal status and employment of migrants (e.g. Tapinos 1999). We follow Ruhs and Anderson (2010) in distinguishing between: 1) Migrants with *irregular* status who do not have the legal right to reside and, therefore, no legal right to work in the host country; 2) migrants with *regular* status who have a legal right to reside and work in the host country and who are in compliance with all the conditions and employment restrictions (if any) attached to their immigration status; and 3) migrants who have the legal right to reside but are working in violation of some of the conditions and employment restrictions attached to their legal migration status (e.g. migrants with the right to work in sector A but working in sector B). We refer to this status as 'semi-compliant'. Although most countries' immigration laws regard 'semi-compliance' as leading to 'irregular status' and, therefore, liability to removal, prior research (Ruhs and Anderson 2010) has shown that semi-compliance is a relevant and distinct category in perceptions of employers (and migrants) which is why we use this approach also in this paper.

Given these definitions, we now discuss how national immigration policies, labour market regulations, and welfare settings can be expected to influence employer use of irregular migrant workers, both independently and in interaction with each other.

2.1 Immigration policies

Immigration policies play an important role in shaping the labour pool available to employers, not only in terms of size but also compositions and characteristics including the rights, incentives and vulnerabilities of different types of (migrant) workers. As Bridget Anderson (2010, p.300) has argued, 'immigration controls function as a mould, helping to form types of labour

with particular relations to employers and the labour market'. Migrants available to employers do not only include those who entered under labour immigration programmes but also those admitted as students, family members, or protection seekers/beneficiaries who may have a full, restricted, or no right to work. How exactly countries regulate the admission and access to welfare provision and the labour market for these groups of migrants – and especially whether and how freely asylum seekers can access the labour market – can have significant consequences, not only for the number and types of migrant workers employers can access legally in their country but also for the likelihood of employing migrants with irregular or semi-compliant status. This is because the existence, magnitude and types of any illegal practice are fundamentally related to existing laws and regulations. If there were open borders and no restrictions on migrants' access to the labour market, there would be no irregularity or semi-compliance in the employment of migrants, although of course there could be informality and illegal employment practices more generally. In a fundamental sense, therefore, the greater (and more complex) these legal migration and employment restrictions, the larger will be the room and potential for employer use of irregular or semi-compliant migrants.

It follows that a fundamental reason for some employers turning to irregular migrant workers is the absence of suitable channels for recruiting and employing migrants legally. It is important to add, however, that opportunities to employ migrants legally do not automatically eliminate or even reduce the prevalence of irregularity in migrant labour markets. Some employers may consider it preferable to recruit irregular migrant workers even when there are legal opportunities for accessing and hiring workers from abroad. For example, some employers may prefer irregular migrants to avoid costs associated with recruiting migrants through legal channels. Some employers may consider the deportability of irregular migrant workers a way of exercising control over migrants (e.g. De Genova, 2002) that allows them to lower wages and employment conditions – though important to note that migrants employed on work permits are also deportable if they lose their permits and some employers may feel they exercise more control over migrants with work permits than they do over those without regular status (Ruhs and Wadsworth, 2017). Of course, employers can only use migrants' irregular migration status to their advantage if they know and understand the facts and implications of migration status. This may not always be the case; for example, when migrants falsify identity documents.

Another important factor shaping employers' incentives to use irregular migrant labour is perceived risk. Detection can mean financial and other costs including, in some countries, criminal charges and business closure. Relatedly there is the reputation risk of being seen as "bad employers". Employers' assessments of risk of detection and associated costs will depend on the perceived probability of detection (partly dependent on the state's enforcement activities) and the level and types of sanctions involved (e.g. civil penalties, criminal sanctions, etc). Employers perceive and manage these in different ways, with some employers more risk averse than others. Some may use labour market intermediaries, such as employment agencies and other types of sub-contracting, to manage risks related to the legal status of their migrant workers (e.g. Ponzo 2025; Triandafyllidou and Bartolini, 2020), whereas others may choose to phoenix, that is, continue to operate in much the same way but under a different business name.

For all these reasons, employer use of irregular migrants can be expected to vary with the characteristics of national immigration policies and related enforcement measures which influence both the real and perceived vulnerabilities and motivations of the available migrant

workers as well as the potential risks and costs associated with the employment of migrants with irregular or semi-compliant status.

2.2 Labour market institutions

National labour market institutions – including minimum wages, collective bargaining arrangement and other types of labour market regulation and norms – influence the employment of migrant labour (Afonso and Devitt 2016; Wright 2012; Ruhs and Anderson 2010) and they can also be expected to shape employers' use of migrants with irregular or semi-compliant status. We focus on four aspects: the degree of regulation/flexibility of labour markets; the prevalence and regulation of employment agencies and other labour market intermediaries; the sectoral organisation of work; and the informality of labour markets and associated social employment practises.

First, labour market institutions can affect labour and skills shortages and employers' responses (cf. Broberg et al 2024; Fox-Ruhs et al 2025; Ruhs and Anderson 2010). For example, countries with lower levels of labour market regulations and fewer employment rights tend to be associated with more flexible, larger low-wage labour markets (see e.g. Grimshaw 2011) and greater demand for migrant labour (see e.g., Wright 2012; Devitt 2011). This is partly thanks to employers being able to lower wages and employment conditions but is also related to the deficiencies of domestic skills production systems. Flexible labour markets are often associated with relatively weak vocational training (cf. Afonso and Devitt 2016) and education and training systems that provide general rather than industry-specific skills (Hall and Soskice 2001). Critically, more flexible labour markets with limited enforcement of labour standards may not only generate a greater demand for migrant workers (in general) but can also be expected to encourage employers to make greater use of irregular migrant workers employed at sub-standard working conditions.

Second, employer use of different types of migrant workers is often heavily influenced by employment agencies that provide temporary workers to businesses. While some agencies are used by both migrant and citizen workers, others are sometimes more specialised in providing businesses with citizen or migrant workers. As a consequence, the size, composition, and regulation of these agencies (also known as 'labour providers') can have a significant impact on employers' use of migrant workers with different types of legal status. Countries with a poorly regulated employment agencies may experience more use of irregular migrants who are "provided" by employment agencies or expose regular migrants to irregularisation because of lack of proper documentation. Research has shown that some employers use employment agencies partly to "outsource" concerns about the legality of workers' legal residence status and rights to work (e.g. Fudge and Olsson 2014; Strauss and Fudge, 2017) .

How work is organised and regulated in specific sectors also affects employer demand for migrant labour with different types of legal status. Institutional and regulatory frameworks vary across different products/services within countries and can also vary for the same products/services across countries. For example, there are different ways of organising and regulating the provision of older adult care including care homes vs home care and publicly funded vs privately funded, with implications for the use of migrant workers (e.g. Marino and Keizer., 2023; van Hooren 2012). If the provision of a particular service is publicly funded, underinvestment in a publicly funded sector can put pressure on labour costs and create a structural demand for low-cost (including irregular) migrant labour as has been the case, for example, in the social care sector in the UK (e.g. Moriarty 2010).

The model for older adult care prevalent in a particular country may also influence the use of *irregular* migrants. For example, a home care model is likely to be associated with greater irregular employment of migrants than a care-home model, partly because care and employment in private homes is likely to be much less visible. Home care is also likely to be associated with greater degrees of informality and a higher prevalence of atypical working and contracts, and this may affect use of irregular migrants (Fox-Ruhs et al 2025).

Fourth, we also expect labour market norms to matter. In particular, the prevailing norms around informal working (i.e. its history, embeddedness in employment relations, and broader societal acceptance) may have spillover effects for the employment of irregular migrant workers. Specifically, we expect countries and sectors with larger informal working histories and practices (among all workers, not just migrants) to be associated with greater employment of irregular migrants which employers may see as less problematic.

2.3 Welfare institutions

Welfare institutions – broadly conceived to include public services and social policies aimed at addressing social needs including healthcare, education, housing, and economic security (Rice, 2012) – can have important direct and indirect effects on employer demand for migrant labour. First, as a basic direct effect, we expect institutions associated with higher non-wage costs for employers to be associated with greater incentives to employ workers informally (ILO 2021) and, perhaps to use more irregular migrants. This is most likely to be the case in lower-wage sectors with significant pressures on labour costs.

Second, a country's welfare policies can influence the size and characteristics of the available labour supply and thus affect perceived shortages and, consequently, demand for (irregular and other) migrant workers. For example, a country's benefits system can affect citizens' incentives to work (Chan and Moffit 2018) and the quality of jobs (e.g. Jones et al 2024). Active labour market policies can increase citizens' participation in employment (Card et al, 2010) and childcare policies can improve parents' labour market participation and outcomes (Olivetti and Petrangolo 2017; Halim et al 2023). Although welfare state regulation is acknowledged as a factor influencing citizens' labour market participation, its role in migrant labour market participation has thus far received more limited attention despite the extensive literature on migration and welfare states (Dias-Abey, 2021). A recent study of a policy reform in Denmark suggests that while restricting welfare access for refugees may increase their labour market participation in the short term, the long-term employment effects are much smaller (Dustmann et al, 2024). A review of the available evidence on the effects of cash transfers for migrants and refugees identifies mixed results (Fasani, 2024).

Critically, in addition to having such 'real' effects on labour supply, the characteristics of national welfare institutions, and especially the generosity of the social protection and benefits system, may also shape employers' *perceptions* of the motivations, suitability, and availability of different types of workers. The welfare norms and broader societal attitudes associated with particular welfare institutions are also likely to matter in this context. For example, we anticipate that the social acceptability of "living on benefits" may affect not only workers' actual incentives but also employers' perceptions of the motivations of different groups of workers. Gender norms are also likely to influence realities and employer perceptions of which workers will be available for what jobs and under what conditions (e.g. Huynh and Ku, 2025).

The nature of the public infrastructure and resources that enable individuals to meet caring responsibilities within the family are likely to play a particularly important role in shaping employer demand for migrant labour. Services like healthcare, education, and social assistance alongside childcare and housing which European states may subsidise or deliver, provide crucial support for this work as do labour market regulations like parental leave, and control over working hours. Cross country differences in these policies and practices can influence labour supply in complex and interacting ways. For example, weak welfare childcare institutions and support may limit citizens' ability to participate in the labour market, increasing employers' reliance on migrant labour, including irregular migrants, for low-wage roles. They may also pressurise citizens to engage in labour to meet the costs of e.g. elder care, or may increase demand for cheap, flexible care workers, which can lead to greater use of irregular migrants, especially women, or may have all three consequences to varying degrees depending on local factors.

Public housing and transport policies are another potentially important factor. A lack of affordable or public housing can lead to shortages of workers in particular areas (Hick et al. 2024). Similarly, transport policies can affect the cost of transport and local workers' willingness to take jobs away from where they live (Bastiaanssen et al 2020).

2.4 Institutional interactions and path dependencies

In addition to these direct, independent effects of institutions, employers' use of irregular migrant workers is likely to be sensitive to interactions between immigration policies and socio-economic (labour market and welfare) institutions. Given the diversity of labour market regulations and welfare systems across Europe, a large range of potential institutional/policy configurations are possible, and they may also vary across sectors. We are, however, still able to develop a broad expectation: employer use of irregular migrant workers is more likely in contexts where there is a tension between national labour and welfare institutions and immigration policies, specifically where national labour and welfare institutions encourage use of greater migrant labour (in the ways discussed above) but the prevailing immigration policies either provide no legal channels or only highly limited legal opportunities for the employment of migrant workers.

How such institutional interactions and tensions shape employers' use of irregular migrant labour partly depends on the relative stability and path-dependence of the specific institutions involved. As mentioned above, national labour market and welfare institutions tend to be more stable than immigration policies which have, in recent years, been characterised by high degrees of politicisation and frequent policy changes. One implication of our theoretical discussion is that if employer demand for migrant labour is substantially driven by national labour and welfare institutions (e.g. by a poorly funded and therefore low-wage social care sector), a change in immigration policy (e.g. a reduction of social care work permits) without a change in the institutional context that caused the shortages of workers in the first place will be unlikely to reduce employer demand for low waged workers and risks various forms of informality and irregular employment including employment of irregular migrant workers.

3. Empirical approach

To address our core research questions – why employers use irregular migrant workers and how this is influenced by national labour and welfare institutions – we conducted qualitative and survey interviews with employers across four sectors in five European countries. The rationale underpinning our empirical approach and case selection was to pick countries that are geographically close to each other and broadly similar in economic development, but different in their national labour and welfare institutions. We restricted the interviews to specific sectors firstly, to provide some empirical focus and make the data collected across the five countries as comparable as possible and, secondly, to facilitate exploratory analysis of whether and how sector-specific institutional frameworks (as a sub-set of national labour market and welfare institutions) influence employers' use of (irregular) migrant workers.

It is important to highlight that the focus and highly sensitive nature of our research generate constraints for the empirical approach and analysis, not only in terms of accessing research subjects and identifying outcomes but also with implementing a comparative institutional research design. For example, the employers we managed to interview and survey are not representative of all employers in a specific sector and country, nor of employers of (irregular) migrants in a given sector. Furthermore, the interview data simply convey employer perceptions and strategies rather than their actual use of migrant workers with different types of (regular and irregular) migration status. All this means that any differences in employers' perceptions across countries and/or sectors that we identify as being in line with our expectations can only be suggestive of the likely role and effects of institutional contexts in influencing employers' behaviour and strategies.

3.1 Case selection: Countries, sectors, and employers

We interviewed employers in Austria, Italy, Poland, Sweden, and the UK. Table 1 below draws on common classifications in existing comparative welfare and labour market research to provide a brief overview of how these five countries differ in terms of their national labour market and welfare institutions.

Table 1: Overview of differences in welfare and labour market institutions across Austria, Italy, Poland, Sweden and the UK

	Variety of capitalism classification*	Welfare state regime§	Social insurance	Benefits generosity§	Means-tested benefits§	Labour Market Regulation§
Austria	Coordinated market economy	Continental corporatist	medium	High	medium	high
Italy	Coordinated market economy	Mediterranean corporatist	medium	High	low	high
Poland		State insurance	low	High	low	low
Sweden	Coordinated market economy	Universal	high	High	medium	medium
UK	Liberal market economy	Basic security	medium	Low	high	low

Sources: *Hall and Soskice (2001); §Österman et al. (2023), specifically Table 1 on page 383

Across the five countries, the interviews and surveys of employers focused on the following four sectors: restaurants; waste management and recycling; older adult care; and agriculture and food processing. In the restaurant sector, we concentrated on recruiting larger rather than small, migrant-owned establishments that dominate existing literature this topic (e.g. Bloch et al 2014). We excluded platform-based food delivery services, where there is also a rich existing scholarship (Sigona et al 2025; van Doorn et al 2022).

Waste management and recycling is a highly financialised sector, structured around complex international supply chains and dominated by a handful of multinational firms (Gregson 2023). Using the European Commission's statistical classification of economic activities (NACE), we focused on waste collection, waste treatment and disposal, materials recovery, remediation activities, and sector-specific labour provision.

In older adult care, we focused on recruiting employers operating care homes and nursing homes. We were especially interested in the relationship between the state and private providers, which varies across our focus countries.

Agriculture and food processing includes global agribusinesses with complex ownership structures – such as private equity-backed poultry firms – and smaller family-run farms supplying supermarkets and local stores. Given the size and diversity of the sector, there were some differences in the sub-sectors where we managed to secure qualitative interviews across countries. In Austria, we interviewed wine and organic farming; in Sweden, large food producers; in Poland, fruit and vegetable producers and meat and fish processing; and in the UK, poultry supply chains.

It is also important to clarify our understanding and operationalisation of the figure of the 'employer'. An employer is legally defined as the party to a contract of employment who engages another person to perform work (Deakin & Wilkinson, 2005), but this definition is increasingly blurred by subcontracting, agency work, diverse contracts, and dispersed managerial responsibilities. Migration research often overlooks these complexities and the broader supply chains in which employers operate. To address this, we adopted a broad definition of "employer," including those with recruitment or managerial authority, even if not business owners. Our sample encompassed owners at site, regional, and national levels, as well as HR managers, Compliance Officers, and Operations Managers with responsibility for personnel management. Given variation in organisational structures and size, restricting interviews to one type was not feasible; our data therefore presents a non-representative cross section.

Existing literature highlights that employer size significantly influences recruitment strategies, with larger firms typically adopting formalised, multi-channel approaches and smaller firms relying on informal networks (Brändle et al., 2022; MAC, 2022). Larger employers also invest more in training and have greater capacity to navigate complex immigration systems (Holtmann & Idson, 1993; CIPD, 2023). Yet the effects of employer size and type remain under-addressed in migration research. Given access limitations, we aimed to be mindful of these dynamics when examining the use of irregular migrant labour.

3.2 Qualitative interviews and online surveys

We took two complementary approaches to data collection. Our primary approach involved semi-structured interviews with employers undertaken between September 2024 and April 2025. As a secondary approach, we conducted online surveys of employers between April 2024

and June 2025. The interview and survey instruments were both designed to investigate how employers engage with migrant labour in relation to institutional and immigration policy contexts. As the response rate to the survey was low and highly variable across countries, the analysis in this paper is largely based on the qualitative interviews. We use survey responses to supplement and further illustrate key results of the qualitative interviews, where helpful and appropriate.

The interviews and surveys were conducted by national country teams (all part of the larger PRIME project). Each of the five country research teams tailored their access strategies to national and sectoral contexts. In some countries, access to interview participants built on the employer survey. We asked survey respondents to indicate whether they would be interested in taking part in an interview and snowballed, asking participants to make introductions to interested colleagues. Other recruitment strategies included attending trade fairs, articles published in trade press, and snowballing from key policy actors working for employers' associations.

Table 2 below presents the sectoral distribution of the numbers of participants in qualitative interviews across the five countries.

Table 2 Overview of qualitative interviews conducted across countries and sectors

	Older adult care	Restaurants	Agriculture and food processing	Waste management	Total
Austria	7	13	10	5	35
Italy	3	4	10	2	19
Poland	8	8	11	10	37
UK	13	6	9	4	32
Sweden	5	2	4	3	14
Total	35	33	44	24	137

Turning to the online survey, which we conducted using the 'LimeSurvey' software, we began recruitment by cascading invitations to key contacts in trade associations, cold emails via publicly available contact data, and hard copy flyers. Challenges in this approach led to most country teams moving away from in-person outreach and direct distribution towards collaborations with market research agencies and paying for access to databases of employer email addresses. Such approaches are increasingly widespread in survey research (e.g. Forde et al., 2024). Collaborations with market research agencies proved more effective, at least in some countries. In Poland, targeted social media advertising led to more people opening the link but there was not a corresponding uptick in participation. Table 3 below summarises responses by country and sector.

Table 3 Numbers of survey respondents across countries and sectors

	Older adult care	Restaurants	Agriculture and food processing	Waste management	Labour provision	TOTAL
Austria	8	9	8	3	0	28
Italy	0	4	65	0	1	70
Poland	13	20	17	6	13	69
UK	51	25	53	11	7	147
Sweden	42	102	93	18	14	269
TOTAL	114	160	236	38	35	583

More detailed characteristics of the characteristics of survey respondents can be found in the Appendix. The vast majority (just over 90%) of the businesses surveyed were small-and medium-enterprises (SMEs), with some significant sector variations (e.g. as shown in Table A1, over two thirds of businesses surveyed in agriculture employed/used fewer than 10 workers, while over 20 percent in waste management were large companies that employed/used over 250 workers). The reported shares of labour cost in total revenue were highest in the care sector, and lowest in agriculture (Table A2). Two thirds of businesses experienced labour/skills shortages during the past year (Table A3); shortages were lowest in the waste management sector. Just under 60% reported difficulties with recruiting national workers (again lowest in the waste management sector), although there were some country variations, e.g. employers in the care sector in Poland reported fewer such difficulties than their counterparts in the other four countries (Table A4). Just under half of the businesses surveyed used migrant workers. This overall share was highest in the care sector and lowest in the waste management sector, but again there are significant variations across countries (Table A5). Finally, among those businesses that employed/used migrants 45 percent used mainly non-EU migrants, 15 percent mainly EU migrants, and the rest a mix of both groups (Table A6).

4. Findings from five European countries

Our empirical analysis is structured around the expectations that we developed in section 2. As already explained earlier in the paper, the purpose of developing theoretical expectations was to guide the empirical analysis rather than to provide formal hypotheses for 'testing' (as the nature of our data makes formal testing impossible in this paper).

We first consider the role and effects of immigration and related enforcement policies on employer use of irregular migrant labour. The subsequent sections focus on the roles of labour market and welfare institutions.

It is important to keep in mind that our interview data convey employers' *perceptions* and articulations of their employment and recruitment practices. In general, employers acknowledged employment of irregular workers in their sector but, with some exceptions, attributed it to colleagues, often sympathetically described as having been put in "impossible positions".

4.1 Immigration and related enforcement policies

Even in highly flexible labour markets employment of *migrant* labour is highly regulated. Our interviews confirm previous research, that immigration status, including legal status, facilitates control.

Legal pathways: Changing access and rights

Employers appreciated legal schemes as providing access to a labour pool 'not contaminated by Europe' (PL-e-26 agriculture). In some cases, the absence or removal of a legal labour supply of migrants was claimed to be associated with an increase in irregular employment.

For example, in the UK Brexit was cited as a serious shock to labour supply:

> 'Before Brexit, our largest workforce demographic was made up of Eastern European – and then Brexit happened… Where are we going to get these people – the Romanians, and the Polish, especially?' (UK-e-32 agriculture and food processing).
>
> They're really good and they want to come, and they can't come and I'm willing to take the risk, you know. Where we are, we're a farm stuck out in the middle of nowhere, well we're not a factory in a middle of a town or something. So, it's a little bit easier to get away with things I think sometimes (UK-e-07 agriculture).

Conversely, migrant workers *gaining* rights made employment of legally resident migrants less attractive. When, after the Russian full-scale invasion of Ukraine, Poland implemented Temporary Protection Status for Ukrainians, Ukrainians could register for a PESEL-UKR number, which provided legal residence, access to the labour market, and social benefits. Ukrainians already resident in Poland gained these rights too. They also found it easier to migrate to other European countries where they could earn more. A combination of these factors seems to have changed employer attitudes:

> A foreigner [*later clarified as meaning Ukrainian*] at the moment is a difficult worker. He used to be easier… Since there's a war…he's demanding. He knows what he wants. He is no longer as cheap as he used to be… They want to earn more money, even though they don't have that experience and full education really… And their mentality has changed. They have claims, they demand' (PL-e-3 care).
>
> Ukrainian woman used to be – it was the so-called "cheap labour". Now it is a thing of the past. Now they are hired and go on sick leaves and so we do not have an employee (Pl -e-19 care).

Legal pathways: production of semi-compliance

Legal pathways that deny or restrict migrants' rights to employment can lead to semi-compliance, i.e. a situation where migrants with legal residence status are employed in a way that violates the work restrictions attached to their status. Semi-compliance, as contrasted with employing fully irregular migrants, can come with plausible deniability where at most you 'get a slap on the wrist from the Home Office' (UK-e-25 restaurant).

Student and dependent visa holders

Student and family/dependent visas are an important labour source in all the countries where we conducted research. All five countries limit the number of hours student visa holders can work, except for Sweden where the only requirement is that work should not interfere with studies. Recruiting students reduces the bureaucratic burdens of third country recruitment and can offer intersecting advantages of gender and age to employers, particularly in the restaurant sector, which we found was the sector most likely to employ student visa holders. The restrictions on hours are hard to monitor for enforcement, giving employers wriggle room, but meaning that student visa holders risk, deliberately or not, falling into semi-compliance:

> Sometimes we're a bit more fluid on the hours. You can't get it down absolutely to a fine tee. There's some fluctuation. As long as the correct amount is showing on the payslip, I don't know how much of a blind eye the Home Office will take or how much they scrutinise with the employer (UK-e-25 restaurant).

The production of semi-compliance is further illustrated by the status of dependents. In the UK, for example, dependents of Skilled Worker visa, Family Visa, and Health and Care Worker visa holders generally have relatively unrestricted access to the labour market. If the visa holder's status becomes semi-compliant – e.g. by exceeding permitted working hours – the dependent's status also becomes semi-compliant, even if the dependent has been working legally.

Asylum seekers

People seeking asylum who work in breach of employment restrictions is a form of semi-compliance that has attracted significant policy concern across Europe. The legal access of asylum seekers to national labour markets is restricted in all five countries, some more drastically than others. In Austria, with the exception of seasonal agricultural work, employers are required to preferentially accept Austrian/EEA residents before being permitted to recruit an asylum seeker. In the UK and Austria, where asylum seekers' access to the labour market is particularly restricted, employers were keen to loosen restrictions:

> Clearly the situation in Syria and the situation around the world is going to drive people to countries that are safe. We need to understand that that's potential workforce and rather than having them sit in serviced hotels waiting for paperwork, they're waiting to work. But unfortunately, presently our laws, our regulations, and the general public if you like, don't want to put them to work (UK-e-28 agriculture and food processing).

Employers often favour asylum seekers' access to the labour market but with continuing maintenance of some restrictions i.e. additional labour control mechanisms:

> If we were to look at a way of having these people work under license with agencies compliant and controlling this, then you'd be raising money rather than spending money (UK-e-06 agriculture and food processing).

Specific visas

Student visas and asylum seeker status are immigration statuses whose relations to the labour market are complex but broadly similar across Europe. However, there are also visas which create vulnerabilities to semi-compliance. The details of how this works depends on the route,

the sector, and the country. We give the example of the UK's Health and Care Worker visa here for illustrative purposes.

The structure of this visa creates the conditions under which *semi-compliance* can emerge. For example, UK parliamentary scrutiny shows that the rapid expansion of the Health and Care Worker route occurred without adequate assessment of exploitation and non-compliance risks, and the sector has seen rising instances of abuse, underpayment and unstable hours, conditions that push workers to compensate by seeking additional, often unauthorised, employment. At the same time, the visa imposes strict limits on supplementary work, only permitting up to 20 additional hours on the same occupation code, meaning that many care workers resort to informal or unpermitted jobs to meet basic living costs, a pattern illustrated by enforcement cases where Health and Care Worker visa holders were penalised for taking on second jobs outside the permitted scope.

Enforcement and perceived risks

The risk of being discovered employing undocumented workers is an important factor in employers' decision-making processes. It is a risk that varies across countries. A waste management employer who operates both in Poland and another EU country, noted 'there is no risk in Poland, in other countries there are labour and environmental inspectors. In Poland if there's going to be a labour inspection, you're given advance notice so you can prepare' (PL-e-02 waste). There is a perceived relation between immigration and other inspections and regulations, including sector specific regulatory regimes. An Italian meat processor explained that artisanal meat production is too heavily regulated to allow irregular workers while in Sweden, health and social care employers cannot hire anyone not approved by the Inspection for Health and Social Care (SE-e-73 care).

Digital technologies mediate risk of discovery, but in contrasting ways. In Sweden, the shift to digital payroll systems and a cashless economy has made irregular employment harder (SE-e-57 restaurant). Conversely, in the UK, digital banking tools can facilitate irregular recruitment. One employer explained:

> So, there's one José Manuel Hernandez – and he is legit – and there are probably six or seven people using his ID to get a bank account, which is… you know, as long as it's online – your Monzo account – a Tide account – or something else – where the challenger banks – some are more rigorous than others. So, there's an opportunity still to get paid – until you're found out – and then you just move 'em (UK-e-31 restaurant).

There is anxiety about the employment of irregular workers attracting other forms of scrutiny: in Italy, hiring a non-Italian can be a 'beacon' for inspection more generally (IT-e-02 agriculture) while in the UK immigration enforcement is much more vigorous than labour standards enforcements. For example, in 2024 there were 2,600 National Minimum Wage workplace enforcement visits (LPC 2024) and 828 immigration workplace raids in the single month of January 2025. Nevertheless, irregular employment is more common in poorly regulated or low-enforcement sectors, such as live-in care. Employers often cited urgency and cost as drivers

> The fact is certainly due to the urgency of the need and to solve a need, but also for economic reasons, hence a lower cost. Today, a family that takes on an irregular worker

> risks, risks a lot, just like any other employer. If this one is also irregular from the point of view of documents, then of course there is a great risk for the family (IT-e-05 care).

Bureaucracy

The perceived complexity of bureaucratic systems and processes for recruiting migrant workers – especially recruiting from abroad – was seen as creating more room for the employment of irregular workers across all four of our sectors. Some employers claimed overly complex procedures and long waiting times could push employers into employing illegally.

> The police headquarters have a monstrous backlog, so we sometimes take in workers whose permits have expired and are awaiting renewal. And this also complicates our lives because, naturally, we include them with doubts... It has happened, a few rare times it has happened. And we have also addressed this issue with the authorities, and in principle it has always been made clear that the problem does not lie with the family, but with the system, which cannot bear responsibility (IT-e-5 care).

> Well, I know of a neighbour who ... planted in January and needed employees and he registered everything on time. But he didn't get the permit until much too late... the quota had not yet been released and he said: 'I have the plants. I have to work now'... Then he was checked... and he ended up in front of the judge and had a criminal record. he got so upset and said, 'What am I supposed to do?' Yes, he registered them with the health insurance company. But they didn't have a work permit (AT-e-27 agriculture).

This last example is a consequence of bureaucratic processes associated with the Austrian *Arbeitsmarktservice* (AMS) or Austrian Public Employment Service, a labour market institution which connects jobseekers with employers. It implements and oversees requirements and processes such as labour market tests, quota management, and permit renewals. Employers must apply for an employment permit at the regional AMS which may send alternative candidates who are Austrian, EEA citizens, or resident third-country nationals with unrestricted access to the labour market before the regional advisory board recommends approval of an employment permit for a non-EU worker.

> I have to tell them: Well, that's the specific person who wants to work on my farm and I can apply for that specific person. And then I have to wait four to five weeks and in that time they could basically send me any unemployed person, which is from an employer's perspective, a pain in the ass, because I want to employ specifically that person and not just anyone. I think it is stupid system, because it assumes people are basically working robots (AT-e-07agriculture).

While employers in all four sectors in Austria have many complaints about the AMS, employers of seasonal agricultural workers were particularly unhappy with the labour market test ('nothing good comes from AMS' ; AT-e-28 agriculture). One common employer complaint relates to the dates quotas are released for non-EU workers, and that employing workers before the quota is released and the permit is granted is considered illegal employment, even if the employer acted in good faith.

It is important to be cognisant of the more informal usage of 'bureaucracy' by employers to suggest excessive paperwork and rigid procedures that bog down decision making and frustrate users. Employers across sectors and countries complained bureaucracy made it difficult to meet labour needs and increased the workloads of existing staff. Many believe complex visa systems work in favour of larger businesses and are a way to consolidate market dominance among firms who can invest in legal and HR teams. 'Basically, we legislate… and we goldplate these things so that the processes are so labour intensive and so drawn out that unless you have a decent HR department…' (UK-e-2 agriculture).

> Polish employers complained about the inconsistencies and the bureaucratic challenges related to obtaining work permits, also noting that processing times varied by region (PL-e-10 agriculture).

Bureaucracy, that is reporting, reporting of employees. It should be somehow in an electronic form, immediate even, that I as a business entity report to a specific party that I accept such and such employee. And there is no problem with that, so to speak. And not that there is such an artificially extended waiting period. Because I understand that an employee can wait a week or two for a permit, but not three months. I had a case when a lady was employed here, I sent her for a card, only not in this unit, but in another one, and I only got a work permit after a year, for 2 years. So I'm telling it from history, from my experience, from history I'm telling it, because I experienced it. And I don't like it. Because she was a very good employee, and unfortunately later we had to drop her and the contract was terminated, because I didn't have a work permit for her, and I didn't want to keep her on the black market, because I was simply afraid of the responsibility (PL-e-09 care).

Labour market tests and the procedure of obtaining work permits can require employers to spend time and money on monitoring to ensure they are compliant (or alternatively turn a blind eye), because there are multiple ways that workers too can bypass the system:

> There's a lot more admin management of those individuals so it's much more labour intensive for our permanent workforce. It also increases the compliance risk a lot… people are having to try and find other ways to get in essentially, and whilst we would always expect that to happen, we've had to adapt very quickly (UK-e-20 waste).

In addition to claims that excessive and unnecessary bureaucracy can push employers into inadvertently hiring illegally, there were also claims that it can motivate employers to take on people illegally. 'If we tighten these laws, I think there will be groups that specialise in acquiring, bringing these people in container' (PL e-7-labprov).

> The complexity of registering third country nationals who want to work. In combination with the fact that local people don't want to do that… Again, the bureaucracy, the complexity of the bureaucracy… What happens in the catering industry. What happens in the construction industry, I don't think agriculture is so much worse [*regarding irregularity*] than others or worse than many other industries (AT-e-31 agriculture).

Complaints about the bureaucracy of systems governing the recruitment of labour from abroad are surprisingly similar given the systems themselves vary significantly. Across different countries and sectors the general feeling is that recruiting from abroad is not the cheap option

but rather a long-term investment. Overall, many of the employers we interviewed expressed a significant degree of dissatisfaction with how their countries' immigration policies operated. This is also reflected in the results of our online survey of employers. Over half of survey respondents rated the performance of their government in regulating labour immigration as either "poor" or very "poor", and less than 10% indicated a "good" or "very good" rating. These results are fairly consistent across sectors (Table A8) and countries (Table A9), although the Austrian employers we surveyed stand out for their particularly high disapproval rates.

4.2 Labour market institutions

We now turn to how the rules, structures, practices and organisations that regulate the workplace and relations between employers, shape usage of irregular migrants. As discussed earlier, labour market institutions can affect employers' use of (irregular) migrant labour independently and in interaction with immigration policies.

Agency labour and subcontracting

As noted above, the complexity of immigration processes can encourage some employers to outsource to agencies (even though some might be 'shady' (AT-e-07 agriculture)). Employers can also turn to agencies (temporary employment agencies or labour subcontractors) to outsource employment responsibilities, reduce costs and avoid long-term commitments. Labour agency use tends to be more prevalent in deregulated or liberal market economies (Jackson and Kirsch, 2014). The use of agencies varies across sectors. In our non-representative online survey of businesses, the use of agency as a way of recruiting labour was highest in the care sector and lowest in agriculture and food processing (see Table A10).

In Section 2 we discussed how labour market intermediaries can facilitate the employment of migrant workers:

> Agency rates have come down significantly over the last two years due simply to the influx of immigrants basically, because they're all from Nigeria, Sri Lanka, Bangladesh, and India, and they're charging £18 and £17.50 an hour for agency. Well, my level twos are on £13 an hour. I pay £1 an hour more at weekends. My level threes are on £14 an hour, once again £1 more at... and my deputy managers on £16 an hour. Well, when you add on the 34% which is employer's national insurance, holiday, pension, ignoring any possible others like sickness, maternity, and all of rest of them, there's 34% in there, you bang that on top of those wages, agency staff now are cheaper, and so in the short-term they solve a problem (UK-e-26 care).

The combination of complex policies and demand for migrant labour can encourage the emergence of businesses supporting employers to access migrant workers. Even in more regulated economies, agency labour can be important for specific sectors, including agriculture and care where it has been shown to enable illegal practices including super exploitation and migrant irregularity (Neef 2020, Triandafyllidou and Bartolini 2020). Employers in Sweden, for example, viewed irregularity as more likely in situations where labour intermediaries are used: 'outsourced, agency labour is where criminality occurs' (SE-e-60 waste). In Poland, employers who rely on migrant workers often use "documentary middlemen" to put workers' documents in order:

> I've had cases like this where an employee comes and tells me 'I don't have the documents. Can you get me the documents?' 'Yes'. And then I take this agency, the agency that gets the documents there, and with the employee there we arrange it (PL-e-2 waste).

Of course, this does not mean that workers' documents *are* in order and can require that the end user of the labour undertakes additional monitoring:

> I still verify them [agencies] on a quarterly basis. I do internal audits. ...Working with them is a very dubious and difficult activity. If we want to work ethically and only cooperate with partners who are honest with their temporary employees... We had a big problem because ... at one point the company stopped paying its employees' salaries, and ... if they were paying salaries, they were certainly not paying social security contributions. And here we were afraid that we would be held financially responsible (PL-e-21 agriculture).

Some end users of labour know that irregular migrants are 'hidden' (IT-e-01 agriculture) in labour teams, or that subcontractors are working in breach of various laws (tax evasion, underpayment, and potentially immigration (IT-e-11 agriculture)) but nevertheless plausibly claim ignorance and thereby avoid penalties.

In the UK, agency labour is widespread, and most home care providers are agencies. Despite the reintroduction of regulation for care agencies by the Care Quality Commission in 2024, enforcement capacity is limited: the Employment Agency Standards Inspectorate oversaw 40,000 agencies in 2023 with only 33 staff and 20 inspectors in 2024, restricting action to the most egregious cases. 'Phoenixing', where agencies declare insolvency to evade liabilities before reopening under a new name, is common. Employers were frank about the lack of regulation:

> I think bringing back regulations and for all agencies, not just the ones that do domiciliary care, I think they should have those inspections going on and it should be routine. If you set up a care agency, you should have, premises where you can be visited by CQC at any time (UK-e-10 care).

We found sub-contracting to be especially prevalent among large companies. Sub-contracting relationships and wider market pressures can also drive down wages and conditions while driving up the use of irregular migrant workers and other forms of irregular labour and employment practices. This is especially the case where, for example, a multinational using several subcontractors (who in turn may use several labour agencies) might pressure suppliers further down the supply chain. As one Polish waste management company owner explained:

> I would like, I really would like my employees to earn twice as much, to make a good living. Only the client doesn't pay me that much. There are some market prices. And everyone in this market is trying to fight over price, because price alone rules. I can say I have great employees, but they earn so much. The customer will tell me that he doesn't

> care. After all, he has a budget, and I have to fit into it. So, this is it. This is the problem that I can't pay people much (PL-e-2 waste).

Efficiency seeking in tendering practices across the supply chain can increase the need for migrant workers because 'without them, I would have to hire Poles for twice as much' (PL-e-2 waste). While demand for irregular migrant workers is often claimed to come from unscrupulous "small" players seeking to cut corners in fact the small players can also at times be responding to demands and pressure on margins from clients or other economic stakeholders. Most obviously in publicly funded sectors like waste and care, wages and conditions are largely determined by the extent to which government is prepared to fund them. In the private sector, one interviewee who operates a relatively small farm with a handful of employees described how he is compelled to make significant fixed investments - on-site worker housing, infrastructure, and digital connectivity - in order to secure and retain workers. He didn't frame these investments as productivity-enhancing or profit-generating, but as necessary costs of maintaining supply under conditions of chronic labour scarcity, geographic isolation, and infrastructural withdrawal when he had to provide produce consistently to a big buyer. Not only do the dynamics of agency use and patterns of subcontracting highlight how the question of 'who is the employer' is obscured, but the layers of distance in contracting arrangements can reinforce the diffusion of responsibility through complex corporate structures.

Labour market norms: Informality

Some employers argued that employment of irregular workers must be understood in the context of multiple types of informality and illegality which exists because the "normal" labour market institutions are too cumbersome to deal with the reality on the ground. Keeping a business going can require 'overstepping their bounds' and 'cheating on tax' (AT-e-29 agriculture) and working excessive hours or paying cash to circumvent non-wage costs are regarded as "normal" in some sectors. Such norms are products of the sector's history, its relationship with a range of institutional settings, and its structure, but can also change over time.

> When I started, it was quite common with "black" payment. They didn't care if they were migrant workers or people who came from Sweden or Stockholm to work. It was more common that they demanded "black" payment. The rule has completely changed. Now people want real wages and insurance, which is good. Then there will always be people who will pay "black" (SE-e-57 restaurant).

Employers also made charges of hypocrisy, saying that the practice of paying in cash to avoid taxes is widespread and asking why employing irregular migrants is regarded as particularly egregious. One employer in Italy explained that irregular working in the restaurant sector has always existed whether in the form of tax avoidance or internal migration (IT-e-06).

Some employers related norms to their specific sectors. This was particularly noticeable in the agricultural sector often in the context of seasonal working (AT-e-27 agriculture).

> Farmers have always traded in cash, they've sold sheep for cash, they've loaned tractors for cash etc. And so, they've fulfilled their staff need by paying cash. So, you

> know, I understand that the government wants the NI wants the tax, wants the legal side of payroll. But, you know, I think we always get into these debates, and we've got to be very, very careful (UK-e-03 agriculture).

Employers in Austria (AT-e-27) and Italy talked about the problem of formalisation – that previously it would have been possible to call on neighbours and family members to help in harvest times but that this is no longer possible (IT-e-02 agriculture).

Labour market norms: the imagined labour pool

The use of migrant labour is in some cases directly regarded as a replacement for an embedded local labour supply. In the UK and Austria employers talked about a generation of older women citizens who are now moving out of care with no citizens to replace them:

> I remember 20 years ago when I when I got into care generally it'd be local ladies that would come in and they would be so kind. Because they'd been used to looking after their mum or their dad or their family member or whatever, ...They want to do something and they would provide amazing care...But the minute you said right, we're going to stick a computer in now, you got to write your notes, they go oh, don't know. I can't type, or read or write (UK-e-08 care).

In Poland, in many places it was possible to meet the strong preference for Polish workers locally (PL-e-17 care, PL-e- 9 care) but there might be some changes afoot. In Warsaw, a labour provider acknowledged 'wages are too low' (PL-e-19 care) and suggested there is a shift to employing migrants, but even in this case estimated only about 10 percent of their placements were migrants, mainly from Europe.

In contrast with care's history of local labour agricultural employers talked about a history of seasonal mobile labour, including internal migration in Poland (PL-e-32) and in the UK:

> But clearly in history whether you look at seasonality and farming in terms of picking fruit, whether you go back to the old days of the hops. You know, we have a history in the UK and most European countries of seasonally bringing in the skill set. So, I don't think that's ever going to change (UK-e-28 agriculture and food processing).

What several of our employers felt was changing in these cases is not the use of non-local workers, but a shift in national origins: 'As far as I can remember, we've always had foreign employees. It was only the country that changed. So, when I was a child, our employees were from Serbia, from Yugoslavia. and then... it was Romanians... And then the Ukrainians came' (AT-e-28 agriculture). There are different ways that people become aware of these new overseas sources of labour: through agencies, through the global consolidation of agri-businesses, through being approached directly, through migrant networks, and through government immigration routes.

In all five countries, there was a gap between employers and policymakers in terms of how labour supply is imagined. Government representations of and policies on labour supply tend to assume a national frame (inflected by the state level in federated countries). In other words, central or federal governments focus on the relation between international migration and the *national* labour market (we suspect this might not be the case for local government). However,

employers discussed recruitment very much in terms of the local or in some cases the regional, and then the international labour market, but *not* the national labour market: 'ultimately let's face it for £12 an hour, you're hardly going to relocate to a different part of the country to get a job' (UK-e-08 care).

Employers recognised the importance of national institutions - the welfare state, education, housing and infrastructure, labour laws - in shaping the local or regional labour supply. They also recognised that these mediate access to international labour: 'a small business down the road from an immigration hotel… if they need a couple of people to do whatever it is they're doing. They all know conversations take place' (UK-e-06 agriculture and food processing). In some areas – eastern Austria and eastern Poland, for example – part of the specificity of the region is that it borders a source country of international migrants. Employers in eastern Austria found workers value being able to travel home relatively easily and so prefer to work in Austria rather than working in Germany which requires a longer-term stay. In contrast, farmers in western Austria complained that migrant workers were more attracted to Germany because they had fewer deductions (non-wage labour costs) and therefore higher take home wages: 'non-wage labour costs in Germany are about 23% of wages for a seasonal worker. In Austria, the figure is almost 29%, 28.9%' (AT-e-39 agriculture). Austrian waste management employers similarly complained that Austrian Heavy Goods Vehicle drivers would rather work in Switzerland. Care employers too made this comparison, but some of them also recruited international migrants via Germany. This was because both Austria and Germany require migrants to go through qualification recognition and language training (in Austria "nostrification"). These processes are more demanding in Germany and people who have failed under the German system might nonetheless pass in Austria, particularly after having experienced one year of speaking German in Germany.

Some businesses operating in different regions of the same country noted different experiences of recruitment in different areas with dependence on migrant labour varying by region. In regions where there is a concentration of similar employers, for example, areas where farmers farm the same crop, there were strikingly comparable complaints about workers leaving to work for a neighbouring farm for a very small improvement in wages (AT-e-31 agriculture). In the case of the care sector, businesses located in areas with a high proportion of retirees, and a low ratio of younger people can find intense competition for workers. In waste management in Italy and the UK, the location of larger facilities mean that employers have diversified how they recruit workers, expanding to include recovering addicts and prison leavers.

This complicates how we think about path dependence by illustrating how different institutional dynamics create and sustain reliance on irregular migrant workers. In the waste management example, the challenge of geographical marginality increases the dependence on labour agencies who can afford to 'pick people up all over the place' (UK-e-19 waste). The use of irregular workers is consequently a product of overlapping institutional factors: worker mobility (both regional and national), employer business models, sectoral norms, and labour market institutions. Non-migration levers shape both worker supply and demand creating institutional lock-in exacerbated by visa categories and administrative routines.

4.3 Welfare institutions

Based on the theoretical discussion earlier in the paper, we focus our analysis of the effects of welfare institutions on employer use of (irregular) migrant workers on non-wage costs, the social protections system, costs and policies related to family care as well as public housing and transport policies.

Non-wage costs and perceived differences in 'work ethic'

From the perspective of employers, employing workers irregularly means not having to pay holidays, sickness, maternity, pensions i.e. the non-wage costs that are employers' contributions to welfare institutions: 'but when I look at it, I need an average of €24,000 gross to pay out €13,000 in net salaries' (AT-e-26 restaurant and AT-e-25 restaurant). When employers speak about these non-wage costs, they often link them with perceived differences in work ethic between migrants and local workers, based on assumptions about how workers with different national characteristics and 'cultures' think differently about work and welfare:

> Because it's just English mentality – I really do think it's that. They want a good work-life balance. A lot of the people that work with us… they're not shy of hard work – maybe their families are not living here – they're living back home – so they can do these long hours – they can send money back home (UK-e-32 agriculture and food processing).

Employers' perceptions of citizens' 'inferior' work ethic compared to migrants were also evident in the results of our survey of employers, When asked about the reason why local (national) workers choose not to work in the sector (see Table A12), respondents mentioned "poor work ethic" as frequently as "unattractive salary" (the latter was the factor most frequently mentioned in the care sector).

Social assistance and unemployment benefits

Irrespective of legal status, non-citizens who are not legal permanent residents typically have restricted access to welfare states and social protection, particularly social assistance (i.e. non-contributory low-income support based on need) and unemployment benefits. As a consequence, migrants with and without legal status can share common pressures to take low waged, precarious or otherwise undesirable work.

Despite differences in social assistance, unemployment benefits, and other welfare state settings across countries, employers feel that welfare disincentives citizen workers irrespective of welfare generosity.

> maybe two people came. But it was one day, and they ran away. I mean they came, but sort of… I don't know, I guess there's a system there that they have to come so they can remain in the system of unemployed and have insurance. I say gee, they just waste my time (PL-e-4, care).

Employers focussed on the *disbenefit* of citizens' too easy access to social assistance: 'the way I see it, we're all doing a bit too well there. And in agriculture in particular we have the problem that we are almost in competition with the social welfare that you simply get in Austria' (AT-e-27agriculture). Similarly, in Italy employers complained about the *Reddito di cittadinanza* or Citizens' Income, a conditional minimum income scheme active from April 2019 to January

2024[1] designed to support economically vulnerable individuals and families. Eligibility depended on household income and assets, and participation in activation programmes, but employers felt that it diminished people's desire for work:

> There's a big slice of beneficiaries, including non-EU people, who take the citizenship income. So for us, as a company, today, going to an employment centre, ...those who still want to work go and register there and find a person really specialised in that sector is difficult, apart from - frankly - the blacks, who are really, really good people in the field and who work (IT-e-02 agriculture).

The RdC does not seem to have increased the availability of care workers in Italy. A 2024 evaluation using INAPP-PLUS data found that labour market participation among RdC recipients did not significantly increase, especially for women and older workers. Notably, despite being overrepresented in the care sector, migrant carers were largely excluded from RdC due to the 10-year residency requirement.

Migrant workers' lack of access to social assistance and unemployment benefits is thus seen as a motivating force, ensuring that they remain a reliable source of low-cost labour. Employers also pointed to migrant workers' lack of caring responsibilities.

Invisible costs of care

As well as non-wage costs, employers sometimes must accommodate demands of elder and childcare, leading in some cases to a preference for workers with no caring reproductive responsibilities.

> I understand that when you have a family of, for example, three children, someone has to help the family or the woman has to take care of them, and it is difficult to combine family commitments with work. We are talking about Polish women, of course. The ladies from Ukraine leave their belongings and children with their grandmothers and go (PL-e-26 agriculture).

Employers often saw the fact that migrant staff did not have immediate family obligations as a positive benefit to management of labour and shifts.

> Invariably, two or three days a week, somebody can't come in because something's happened, whether it's, you know, children falling off skateboards, somebody's mum not well, they've come down with a cold, you know, they've got a cracked tooth (UK-e-13 care).

[1] In 2024, it was replaced by two new programmes:

1. Assegno di Inclusione (Inclusion Allowance) – for vulnerable groups (e.g., elderly, disabled, families with young children).
2. Supporto Formazione e Lavoro (Training and Work Support) – for working-age individuals (18–59) who are not in vulnerable categories. This provides €350/month, conditional on participation in training or socially useful work

One employer described their ideal employment contract as one that would eliminate those with small children:

> Look I'm a mother, but from a certain point on I immediately eliminated those who had small children. Because if they're not sick, the children are sick…I can't write on a contract that absences due to illness of the child are not tolerated, to say things… you know what I mean? You can't do that! (IT-e-09 restaurant).

Social infrastructure: affordable housing and public transport

While affordable housing is not always treated as a social welfare matter, for some employers the relationship between labour and housing is both pressing and direct. Agricultural employers in all five countries provide their workers with housing – usually in the form of caravans, camps, or hostels. Providing workers with housing was also widespread in the care and restaurant sectors. Providing accommodation was seen as an effective way to narrow workers' social worlds:

> We do provide accommodation for them. The money they get for their work is purely the money they really earn. They have no other expenses unless they drink something. Or they go out and smoke. No idea. Private things. They even have access to our restaurants at any time. And they can also cook anything they want. So, they really don't have any expenses. None at all. And we are very much looking to ensure that they are integrated here. Because they are so capable, they hardly feel the need to go out (AT-e-25 restaurant).

Housing pressures in terms of affordability were exacerbated by geography and the availability of public transport:

> Some of those who have got cars and they're great because they're super valuable. They can just jump in the car and say, I'll be there in ten minutes or so those are – they're very valuable those people (UK-e-11 restaurant).

5. Conclusion

Current understandings of the reasons why employers across European countries use irregular migrant labour are predominantly based on 'actor-based' explanations which attribute irregular migrant employment to the interests and behaviours of employers, migrants, and labour market intermediaries. Our results refine and expand upon this explanation by emphasising the critical and often overlooked influence of institutional contexts in shaping employer perceptions and their dependence on irregular and other migrant workers.

Consistent with our expectations, we found that labour market institutions – specifically the regulation of employment agencies and sub-contracting – and associated norms, such as entrenched informal work practises, play a significant role in influencing employers' attitudes and recruitment decisions regarding irregular migrant workers. Similarly, our data show that welfare policies – ranging from social assistance to the provision of affordable housing – affect employers' perceptions of the available labour supply and the terms and conditions under which citizens and migrants are willing to work. These welfare institutions, therefore, also affect employers' labour demands and recruitment practices when it comes to using migrants with and/or without regular status. An interesting finding that cuts across the countries and sectors

we examined is that many employers saw the potential labour pool as local or regional, or alternatively as international, rather than national which is the scale that policy is focussed on.

Although our analysis focuses on general national institutions that are not specific to migrants, we found that the characteristics of the prevailing immigration and related enforcement policies also exert significant influence over employer use of irregular migrant workers. This is as we expected, but crucially we found that it is not just the presence or absence of opportunities for employing migrants legally and the risks associated with enforcement that influenced employers' choices but also the perceived complexity and associated "bureaucracy" of the immigration policies. Of course, employers may be expected to complain about "excessive" bureaucracy and "red tape" (also a common employer complaint in other policy areas) but our findings suggest that the complexity of immigration policy procedures, such as the specifics of labour market test requirements, do have real consequences.

While immigration policies and institutions do have direct effects on employers' use of (irregular) migrant labour, so too do their interactions and conflicts. While the nature and limits of our data did not allow us to make systematic comparisons across countries and different sectors, our analysis makes clear that irregularity in the employment of migrant is more likely where the institutional context generates strong demand for migrant labour but the prevailing immigration policies do not provide adequate opportunities for employing migrants legally. This tension can be exacerbated by different temporalities of change: while institutions tend to be relatively stable over time immigration policy is highly sensitive to politics and increasingly volatile.

The analysis presented in this paper points to several avenues for future research. First, our findings provide a foundation for developing more refined theories and expectations about how institutions, both independently and in interaction, shape employers' use of irregular and other migrant workers. Second, future research should engage more directly than was possible in this study with the figure of the employer in migration studies, paying closer attention to the role and effects of corporate form, ownership models, and processes related to financialisation and marketisation. This would help illuminate, for example, how larger firms – especially those with the capacity to navigate complex bureaucratic processes related to visa sponsorship – shape the landscape of migrant labour and the use of irregular migrant workers. Additionally, the role of digital transformation across the sectors that we studied warrants closer attention, especially in relation to payroll systems and the shift toward cashless transactions, which may be reshaping the mechanisms through which irregular migrant workers are recruited, managed, and remunerated.

Although the analysis in this paper has been exploratory, our results have implications for public debates and policymaking. When considering how to respond to the employment of irregular migrant workers, it is critical for governments to think beyond immigration and related enforcement policies and also consider how the institutional context, especially labour market and welfare institutions, shape the incentives of employers and other key actors (including migrants and citizen workers). If the broader institutional context encourages the use of irregular workers, more restrictive enforcement of immigration policies will, on their own, not be effective in reducing the employment of irregular migrants.

At the same time, our analysis has also shown that the characteristics of immigration policies and related enforcement measures do matter for both the scale and types of irregularity that are likely to emerge in migrant labour markets. Depending on the context, both "too much" and "too

little" regulation can create irregularity. Effective policy-making requires a context-sensitive approach that takes account of how immigration rules interact with existing labour market structures, welfare institutions, and the norms and practises associated with them.

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APPENDIX: Selected results of PRIME (online) survey of employers

Tables A1-A13 are based on data from the (online) PRIME surveys of employers in four sectors (agriculture and food processing; older adult care; restaurants; and waste management and recycling) across five countries (Austria, Italy, Poland, Sweden, and the UK). Results for 'labour providers' are reported separately from the four sectors.

As discussed in the main text of the paper, these results simply describe our sample of businesses surveyed and they are not representative of all employers in the sectors and countries under consideration.

Table A1. Firm size by sector and country (excl. labour providers), percent

All countries	Agriculture	Care	Restaurants	Waste	Total
<10	157	6	54	15	232
%	*67.1*	*5.4*	*33.7*	*39.5*	*42.6*
10-49	52	43	70	12	177
%	*22.2*	*38.4*	*43.7*	*31.6*	*32.5*
50-249	15	47	22	3	87
%	*6.4*	*41.9*	*13.7*	*7.9*	*15.9*
>250	10	16	14	8	48
%	*4.3*	*14.4*	*8.7*	*21.1*	*8.8*
Total	234	112	160	38	544
%	*100.0*	*100.0*	*100.0*	*100.0*	*100.0*

Italy	Agriculture	Care	Restaurants	Waste	Total
<10	48		1		49
%	*73.8*		*25.0*		*71.0*
10-49	15		0		15
%	*23.1*		*0.0*		*21.7*
50-249	2		2		4
%	*3.1*		*50.0*		*5.8*
>250	0		1		1
%	*0.00*		*25.0*		*1.4*
Total	65		4		69
%	*100.0*		*100.0*		*100.0*

Austria	Agriculture	Care	Restaurants	Waste	Total
<10	1	0	4	0	5
%	*12.5*	*0.0*	*44.4*	*0.0*	*17.9*
10-49	3	2	2	1	8
%	*37.5*	*25.0*	*22.2*	*33.3*	*28.6*
50-249	2	2	1	0	5
%	*25.0*	*25.0*	*11.1*	*0.0*	*17.9*
>250	2	4	2	2	10

%	*25.0*	*50.0*	*22.2*	*66.7*	*35.7*
Total	8	8	9	3	28
%	*100.0*	*100.0*	*100.0*	*100.0*	*100.0*

UK	Agriculture	Care	Restaurants	Waste	Total
<10	24	4	7	5	40
%	*45.2*	*8.0*	*28.0*	*45.4*	*28.8*
10-49	16	24	16	5	61
%	*30.1*	*48.0*	*64.0*	*45.4*	*43.9*
50-249	7	19	2	0	28
%	*13.2*	*38.0*	*8.0*	*0.0*	*20.1*
>250	6	3	0	1	10
%	*11.3*	*6.0*	*0.0*	*9.1*	*7.2*
Total	53	50	25	11	139
%	*100.0*	*100.0*	*100.00*	*100.0*	*100.0*

Sweden	Agriculture	Care	Restaurants	Waste	Total
<10	82	1	35	7	125
%	*90.1*	*2.4*	*34.3*	*38.9*	*49.6*
10-49	8	11	43	5	67
%	*8.8*	*26.8*	*42.2*	*27.9*	*26.6*
50-249	1	20	16	2	39
%	*1.1*	*48.8*	*15.7*	*11.19*	*15.5*
>250	0	9	8	4	21
%	*0.0*	*21.9*	*7.8*	*22.2*	*8.3*
Total	91	41	102	18	252
%	*100.0*	*100.0*	*100.0*	*100.00*	*100.0*

Poland	Agriculture	Care	Restaurants	Waste	Total
<10	2	1	7	3	13
%	*11.8*	*7.7*	*35.0*	*50.0*	*23.2*
10-49	10	6	9	1	26
%	*58.8*	*46.1*	*45.0*	*16.7*	*46.4*
50-249	3	6	1	1	11
%	*17.6*	*46.1*	*5.0*	*16.7*	*19.6*
>250	2	0	3	1	6
%	*11.8*	*0.0*	*15.0*	*16.7*	*10.7*
Total	17	13	20	6	56
%	*100.0*	*100.0*	*100.0*	*100.0*	*100.0*

Source: PRIME survey of employers

Table A2: Share of labour costs in turnover among businesses surveyed (excl. labour providers)

All countries	Agriculture	Care	Restaurants	Waste	Total
Under 10%	65	2	3	5	75
%	27.5	1.8	1.9	13.2	13.7
10% - 30%	96	7	38	9	150
%	40.7	6.2	23.79	23.7	27.4
31% - 50%	35	12	96	10	153
%	14.8	10.6	60.09	26.3	28.0
51% - 75%	11	43	11	5	70
%	4.7	38.1	6.9	13.1	12.8
More 75%	1	29	3	1	34
%	0.4	25.7	1.9	2.6	6.2
Variable, can't say	11	8	5	1	25
%	4.7	7.1	3.1	2.6	4.6
Don't know	17	12	4	7	40
%	7.2	10.6	2.5	18.4	7.3
Total	236	113	160	38	547
%	100.0	100.0	100.0	100.0	100.0

Source: PRIME survey of employers

Table A3: % businesses experienced labour/skills shortages during the past year

	Agriculture	Care	Restaurants	Waste	LabourProv	Total
All countries	54.7	79.6	77.5	47.4	57.1	65.5
Italy	64.1					66.7
Austria	87.5	100.0	77.8			85.7
Uk	65.4	76.0	72.0	45.4	28.6	66.9
Sweden	36.6	92.9	79.4	50.0	64.3	63.9
Poland	70.6	38.5	70.0	33.3	61.5	59.4

*Cells with with fewer than. 5 obs not reported

Source: PRIME survey of employers

Table A4: % business reporting difficulties with recruiting national workers

	Agriculture	Care	Restaurants	Waste	LabourProv	Total
All countries	56.1	67.3	57.9	28.9	54.5	56.9
Italy	73.4					73.9
Austria	75.0	87.5	77.8			78.6
UK	72.9	80.0	58.3	27.3	40.0	68.1
Sweden	34.4	59.5	53.9	27.8	50.0	46.1
Poland	52.9	30.8	65.0	16.7	61.5	50.7

*Cells with with fewer than. 5 obs not reported
Source: PRIME survey of employers

Table A5: % businesses surveyed who employ/use migrants (excl. labour providers)

	Agriculture	Care	Restaurants	Waste	Total	*Sample size*
All	39.16	60.9	56.2	24.2	47.5	*495*
Italy	64.66		75.0		65.2	*69*
Austria	87.56	87.5	88.9		89.3	*28*
Uk	44.16	72.4	50.0	33.3	54.0	*87*
Sweden	8.66	45.2	50.0	11.1	31.4	*255*
Poland	76.5	69.2	75.0	16.7	67.9	*56*

Source: PRIME survey of employers

Table A6 : Origin of migrants as reported by businesses (excl. labour providers) that employ/use migrant labour

	Agriculture	Care	Restaurants	Waste	Total
Mostly from outside the EU	43	23	40	1	107
%	*50.0*	*41.1*	*46.5*	*12.5*	*45.3*
Mostly from the EU	18	5	8	3	34
%	*20.9*	*8.9*	*9.3*	*37.5*	*14.4*
A mix of both	25	28	38	3	94
%	*29.1*	*50.0*	*44.2*	*37.5*	*39.8*
Don't know	0	0	0	1	1
%	*0.0*	*0.0*	*0.0*	*12.5*	*0.4*
Total	86	56	86	8	236
%	*100.0*	*100.0*	*100.0*	*100.0*	*100.0*

Source: PRIME survey of employers

Table A7: % of businesses (excl labour providers) reporting that their migrant workers are "mostly from outside the EU"

	Agriculture	Care	Restaurants	Waste	Total	*Sample size*
All countries	50.0	41.1	46.5	12.5	45.3	*236*
Italy	64.3		66.7		64.4	*45*
Austria	0.0	0.0	37.5	0.0	12.0	*25*
Uk	6.2	57.1	33.3	0.0	33.3	*48*
Sweden	62.5	31.6	45.1	0.0	42.5	*80*
Poland	76.9	55.6	60.0	100.0	65.8	*38*

*Cells with with fewer than. 5 obs not reported
Source: PRIME survey of employers

Table A8: Ratings of government's labour immigration policies, by sector

	Agriculture	Care	Restaurants	Waste	LabourProv	Total
Very good	3	1	4	2	0	10
%	*1.2*	*0.9*	*2.5*	*5.3*	*0.0*	*1.7*
Good	10	7	10	2	4	33
%	*4.3*	*6.2*	*6.3*	*5.3*	*11.4*	*5.7*
Okay	36	22	26	4	4	92
%	*15.4*	*19.5*	*16.5*	*10.5*	*11.4*	*15.9*
Poor	81	36	51	12	13	193
%	*34.6*	*31.9*	*32.3*	*31.6*	*37.1*	*33.4*
Very poor	66	27	49	6	7	155
%	*28.2*	*23.9*	*31.0*	*15.8*	*20.0*	*26.8*
Don't know	38	20	18	12	7	95
%	*16.2*	*17.7*	*11.4*	*31.6*	*20.0*	*16.4*
Total	234	113	158	38	35	578
%	100.0	100.0	100.0	100.0	100.0	100.0

Source: PRIME survey of employers

Table A9: Ratings of government's labour immigration policies, by country

	Italy	Austria	UK	Sweden	Poland	Total
Very good	1	1	0	7	1	10
%	1.4	3.2	0.0	2.6	1.4	1.7
Good	3	2	6	16	6	33
%	4.3	6.4	4.1	6.00	8.6	5.6
Okay	12	5	25	33	19	94
%	17.1	16.1	17.0	12.4	27.1	16.1
Poor	28	13	40	93	22	196
%	40.0	41.9	27.2	34.8	31.4	33.5
Very poor	13	10	62	64	7	156
%	18.6	32.3	42.2	24.00	10.0	26.7
Don't know	13	0	14	54	15	96
%	18.6	0.0	9.5	20.2	21.4	16.4
Total	70	31	147	267	70	585
	100.0	100.0	100.0	100.0	100.0	100.0

Source: PRIME survey of employers

Table A10: Ways of recruiting workers as reported by businesses, by sector (excl. labour providers)

	Agriculture and food processing	Older adult care	Restaurants	Waste management	Total
social media	28,8%	59,3%	68,1%	57,9%	48,6%
labour agencies	26,3%	54,0%	50,0%	47,4%	40,4%
company website	15,3%	69,9%	50,6%	50,0%	39,3%
trade press	10,2%	21,2%	8,8%	18,4%	12,6%
general press	5,9%	23,9%	6,9%	21,1%	11,0%
word of mouth	60,6%	56,6%	53,8%	34,2%	55,9%
business networks	26,7%	29,2%	51,3%	39,5%	35,3%
government schemes	5,1%	15,0%	5,6%	5,3%	7,3%
employee referrals	33,5%	47,8%	45,0%	36,8%	40,0%

Source: PRIME survey of employers

Table A11: Ways of recruiting workers as reported by businesses (excl. labour providers), by country

	Italy	Austria	UK	Sweden	Poland	Total
social media	14,5%	78,6%	63,3%	46,3%	50,0%	48,6%
labour agencies	21,7%	60,7%	39,6%	47,1%	25,0%	40,4%
company website	4,3%	75,0%	46,8%	39,2%	46,4%	39,3%
trade press	0,0%	32,1%	20,9%	8,6%	16,1%	12,6%
general press	2,9%	39,3%	17,3%	3,5%	25,0%	11,0%
word of mouth	76,8%	82,1%	69,1%	40,8%	53,6%	55,9%
business networks	1,4%	25,0%	23,7%	51,4%	37,5%	35,3%
government schemes	4,3%	21,4%	15,8%	2,7%	3,6%	7,3%
employee referrals	44,9%	71,4%	48,2%	28,6%	50,0%	40,0%

Source: PRIME survey of employers

Table A12: Perceived reasons why local (national) workers choose not to work in sector, by sector

	Agriculture and food processing	Older adult care	Restaurants	Waste management	Labour provision	Total
Long hours	30,2%	27,6%	41,3%	0,0%	22,2%	31,3%
Physically demanding work	62,0%	51,3%	51,1%	18,2%	55,6%	54,6%
Job is hazardous/dirty	17,8%	18,4%	0,0%	18,2%	11,1%	12,6%
Unpredictable shift/work patterns	31,0%	43,4%	51,1%	9,1%	22,2%	38,3%
Job requires accommodation	14,0%	6,6%	12,0%	0,0%	11,1%	11,0%
Unattractive salary	22,5%	67,1%	45,7%	9,1%	44,4%	40,2%
Poor work ethic	42,6%	40,8%	40,2%	27,3%	5,6%	39,0%
Claim social welfare	30,2%	36,8%	27,2%	9,1%	5,6%	28,8%
Lack of skills	38,0%	25,0%	31,5%	27,3%	33,3%	32,5%
Lack of respect for sector	45,0%	67,1%	39,1%	18,2%	22,2%	46,3%

Source: PRIME survey of employers

Table A13: Perceived reasons why local (national) workers choose not to work in sector, by country

	Italy	Austria	UK	Sweden	Poland	Total
Long hours	21,6%	25,0%	45,3%	23,4%	37,1%	31,0%
Physically demanding work	58,8%	70,8%	48,4%	53,2%	54,3%	54,1%
Job is hazardous/dirty	11,8%	20,8%	20,0%	4,8%	14,3%	12,5%
Unpredictable shift/work patterns	35,3%	50,0%	42,1%	37,9%	22,9%	38,0%
Job requires accommodation	9,8%	4,2%	3,2%	19,4%	8,6%	10,9%
Unattractive salary	11,8%	20,8%	42,1%	52,4%	42,9%	39,8%
Poor work ethic	27,5%	41,7%	60,0%	29,0%	31,4%	38,9%
Claim social welfare	35,3%	25,0%	43,2%	21,8%	5,7%	28,6%
Lack of skills	23,5%	33,3%	34,7%	35,5%	31,4%	32,8%
Lack of respect for sector	43,1%	50,0%	53,7%	41,1%	42,9%	45,9%

Source: PRIME survey of employers