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**RECRUIT4TOMORROW**

**Encouraging employment of third-country nationals  
through social dialogue**

**Deliverable D2.1**

**National Analysis Report for Bulgaria**

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## **Executive summary**

The deliverable, National Analysis Report for Bulgaria, presents the findings from the survey amongst Bulgarian employers regarding the employment of third-country nationals in Bulgaria which was executed as part of the WP2 in the project. In the scope of WP2, we analysed and researched the challenges that labour market stakeholders are facing when dealing with the matching of labour supply and demand by employment of third-country nationals.

The presented deliverable is a detailed report from the national survey results in Bulgaria which will be a basis and a starting point for further analysis and social dialogue on all levels in WP3 where the consortia partners will prepare measures to address the labour market needs and recommendations for policymakers. The first part of the deliverable presents the national survey report in English and the second part (Chapter 2) presents the Bulgarian translation.

## 1. Recruit4Tomorrow - Report on the survey conducted in Bulgaria

In recent years, Bulgaria has faced a labour shortage and challenges for companies in finding suitable personnel. The roots of the workforce crisis in the country can be traced back to the transition from a planned to a market economy, the decline of industrial production and the subsequent emigration. The demographic crisis in Bulgaria and all of Europe led to a significant reduction in the working-age population. Another key driver of change in the labour market was the pandemic and the resulting transformation of the workplace, changes in wages and difficulties in reconciling personal and professional life.

The factors mentioned prompted the need to address the labour shortage by hiring workers from third countries. It's important to note that this approach involves overcoming certain stereotypes and prejudices that employers have developed over the years. Despite that, evidence shows that employers are increasingly turning to this alternative. The purpose of the present survey was to identify the obstacles and challenges in recruiting third-country workers.

The study was conducted through an online survey in the period 22 April – 30 June 2024 and included 102 Bulgarian companies that gave full or partial answers to questions related to the employment of third-country nationals. The first part of the report presents a brief summary of the characteristics of the participating companies, the current state of employment of workers from abroad and third countries, their origins and their salaries. The second part examines the advantages and obstacles to the recruitment of third-country workers, their representation and gaps in supporting their employment.

### 1.1. Characteristics of companies

The characteristics of the companies included in the sample are shown in Table 1.

**Table 1: Company size, classification and industry**

		Frequency	Percent
<b>Size (number of workers) (N = 98)</b>	Less than 10	13	13%
	11-50	32	33%
	51-250	29	30%
	251-500	13	13%
	More than 500	11	11%
<b>Company classification (N = 86)</b>	Family-owned company	10	12%
	Domestic private company	54	63%
	Domestic public company	6	7%
	MNE subsidiary	4	5%
	Other	12	14%

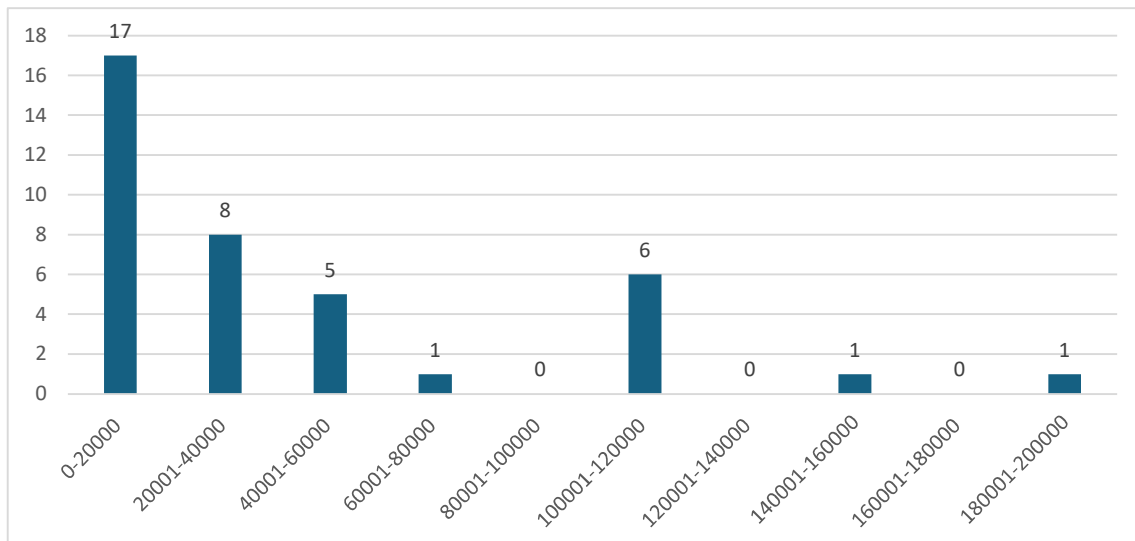
<b>Industry (N = 96)</b>	Construction	19	20%
	Hospitality and tourism	12	13%
	Healthcare	4	4%
	Manufacturing	7	7%
	Oil and gas sector	0	0%
	Automotive sector	2	2%
	ICT (IT) sector	33	34%
	Trade	2	2%
	Other services	17	18%

Source: Own calculations based on the survey

The average value added per worker in Bulgaria in 2023 is EUR 46,525.6, according to the survey data. The values vary in a very wide range, but the majority of respondents who answered this question indicate values of up to EUR 40,000 (Figure 1).

In addition, the average gross salary reported by the companies surveyed was EUR 1824,7 per month which is almost 80% higher if compared to the average gross salary in Bulgaria in 2023 (around EUR 1,022.58). The highest average salaries were recorded in the city of Sofia, where the average gross monthly salary reached 2,722 BGN (around EUR 1,391.74)<sup>1</sup>.

**Figure 1: Value added per worker (per year, in EUR) in 2023**



N=39

Source: Own calculations based on the survey

The survey involved representatives of companies occupying different positions, with two-thirds of them being representatives of management teams, followed by professionals in human resource offices (Table 2). Most of the respondents are men.

<sup>1</sup> [Bulgaria: Statistics institute announces average annual salaries in 2023 – The Sofia Globe](#)



**Table 2: Respondent's position in the company**

	<b>Frequency</b>	<b>Percent</b>
CEO / Director / Member of the management board	24	27%
Head of HR	11	12%
HR professional	12	13%
Head of Legal Department	1	1%
Legal professional	0	0%
Other	42	47%

N=90

Source: Own calculations based on the survey

In addition, all respondents have at least 5 years of professional experience, and most of them have more than 15 years in their respective fields (Table 3).

**Table 3: Duration of working experience of respondents**

	<b>Frequency</b>	<b>Percent</b>
Less than 5 years	8	9%
5 - 15 years	39	42%
16 - 25 years	30	33%
26 - 35 years	14	15%
More than 35 years	1	1%

N=92

Source: Own calculations based on the survey

## 1.2. Employment of foreign workers – current situation

The majority, namely 84% of the companies surveyed, report that they are currently employing foreign workers (Table 4). Half of the respondents report that they employ foreign workers from non-EU countries.

**Table 4: Employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
Yes	81	84%
No	15	16%

N=96

Source: Own calculations based on the survey

The survey also examined the attitudes of those companies that currently do not employ foreign workers (Table 5), including questions about their future plans to employ foreign workers. Of these respondents, 90% (21 respondents) plan to hire foreign workers in the future. Specifically, more than half of respondents indicated that they plan to hire workers from third countries. Only 10% (2 respondents) do not plan to hire foreign workers in the future.

**Table 5: Strategy for hiring foreign workers in the future**

	<b>Frequency</b>	<b>Percent</b>
We plan to employ foreign workers in the future (from EU countries)	8	38%
We plan to employ third-country workers in the future	11	52%
We do not plan to employ any foreign workers in the future	2	10%

N=21

Source: Own calculations based on the survey

### **1.3. Employment of third-country (non-EU) workers**

The results in terms of the number of third-country workers currently employed in companies are interesting. A quarter of respondents report that less than 5% of their workforce is made up of third-country workers, and a fifth report that their share is between 6% and 10%. Notably, 25% of companies have more than 20% non-EU nationals in their workforce (Table 6). These companies operate in construction, manufacturing, and other services.

**Table 6: Distribution of third-country workers in the workforce of surveyed companies**

	<b>Frequency</b>	<b>Percent</b>
Less than 5% of the total workforce	13	24%
6-10%	11	20%
11-15%	7	13%
16-20%	13	24%
More than 20%	9	17%
Don't know exactly	1	2%

N=54

Source: Own calculations based on the survey

Comparing the level of education of workers from third countries, we can say that although there is a great diversity in results, the main share of them have secondary and higher education. Respondents consider that the educational structure of workers from third countries is comparable to that of the total workforce in the company (67%). However, 22% of them consider that workers from third countries have a lower level of education (Table 7). The age structure of third-country workers in the companies surveyed shows that the majority of them are between 31 and 40 years old.

**Table 7: Level of education of the company's workers compared to those from third countries**

	Frequency	Percent
Comparable	34	67%
On average, third-country workers have lower education.	11	22%
On average, third-country workers have higher education.	1	2%
Difficult to answer	4	8%

N=51

Source: Own calculations based on the survey

Non-EU workers are mainly employed for service work (11%) and elementary work (14%), followed by those in manufacturing and professional and technical activities (Table 8). As for some of the other types of work that non-EU workers perform the respondents reported construction, programming, social work, cooking, IT etc.

**Table 8: Types of work of third-country workers**

	Frequency	Percent
Service work (sales, personal care, protective services, personal services, etc)	7	11%
Professional and technical work (healthcare services, legal and other professional services, science and engineering professional services, etc)	6	10%
Production work	8	13%
Elementary work (cleaning services, agriculture, fishing and forestry services, food preparation assistance, etc.)	9	14%
Managerial work	3	5%
Other	29	47%

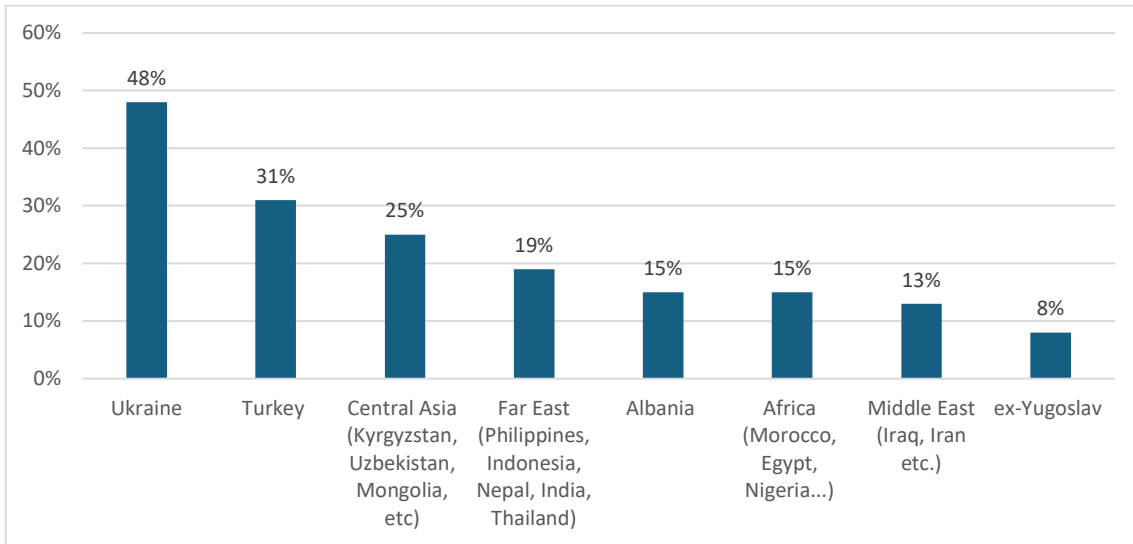
N=62

Source: Own calculations based on the survey

#### **1.4. The origin of workers from third countries**

The companies surveyed indicate that in Bulgaria workers from third countries come mainly from Ukraine and Turkey. A significant number of third-country workers are from countries in the Far East such as Nepal and Thailand, as well as from Central Asia (Figure 2).

**Figure 2: Origin of workers from third countries**



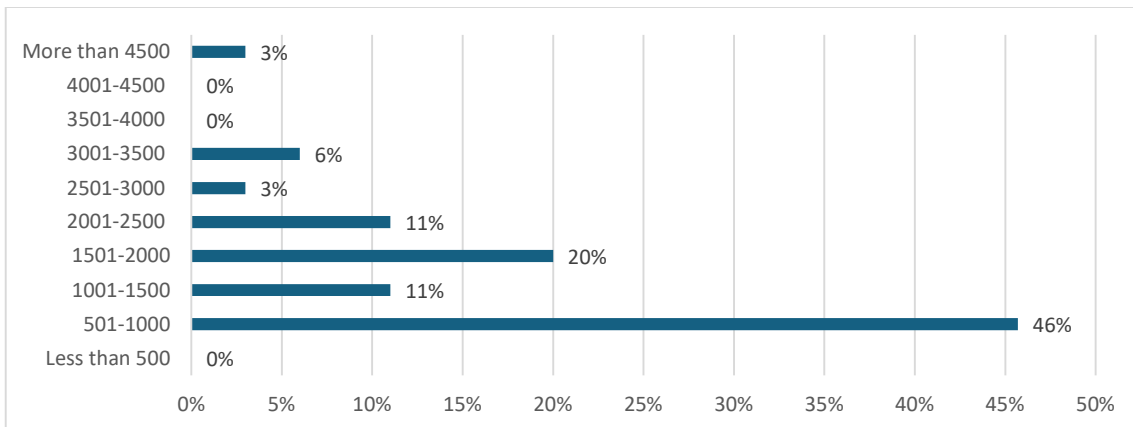
N=52

Source: Own calculations based on the survey

### 1.5. Wages of third-country workers

According to the results obtained, the average gross wage of third-country workers in the companies surveyed was EUR 1505.4. Comparing this result with the data obtained on the average wage in the same companies, we can say that the average gross wage of workers from third countries is lower. Figure 3 illustrates the distribution of average gross wages (per month, in euro) paid to third-country workers in the companies surveyed.

**Figure 3: Distribution of average gross wages paid to third-country workers (per month, in EUR)**



N=35

Source: Own calculations based on the survey

Regardless of the difference in average wages, the majority of companies consider that the wages of third-country workers are comparable to those of their other employees (Table 9).

**Table 9: Qualitatively comparing average gross wages of third-country workers to other workers in the same company**

	Frequency	Percent
Lower	6	12%
Comparable	43	86%
Higher	1	2%
I don't know	0	0

N=50

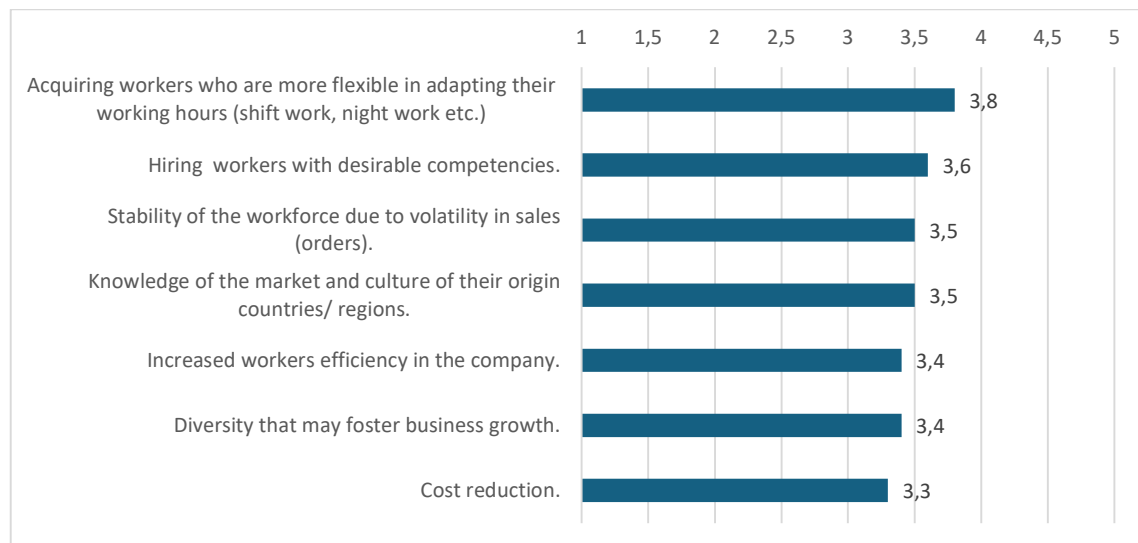
Source: Own calculations based on the survey

Only one of the surveyed companies stated that they received subsidies for hiring workers from third countries to which other workers were not entitled. The subsidy received was from the National Programme for Employment and Training of Refugees, which was run by the Employment agency in the scope of a one-time programme activity of the United Nations High Commissioner for Refugees which allowed funding of start-ups. This programme funded refugees only and is not active anymore.

### 1.6. Advantages and barriers to hiring workers from third countries

The main advantages that companies see in hiring third-country nationals are the acquisition of workers who are more flexible in adapting their working hours (shift work, night work, etc.), possess the desired competencies, stability of the workforce due to the volatility of sales (orders) and knowledge of the market and the culture of their countries/regions of origin. They do not consider cost reduction to be an advantage when hiring workers from third countries (Figure 4).

**Figure 4: Advantages of employing third-country workers (1 = fully disagree, 5 = fully agree)**

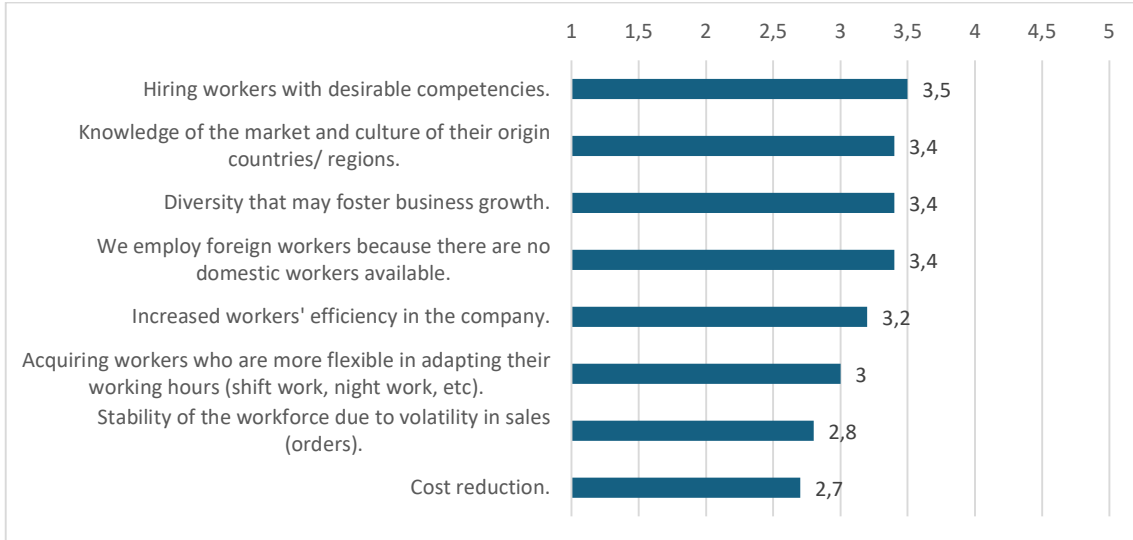


N=15

Source: Own calculations based on the survey

In any case, one of the main reasons why companies decide to employ foreign workers is hiring workers with desirable competencies, knowledge of the market and the culture of their origin countries, diversity and lack of domestic workers (Figure 5).

**Figure 5: Reasons for employing third-country workers (1 = fully disagree, 5 = fully agree)**

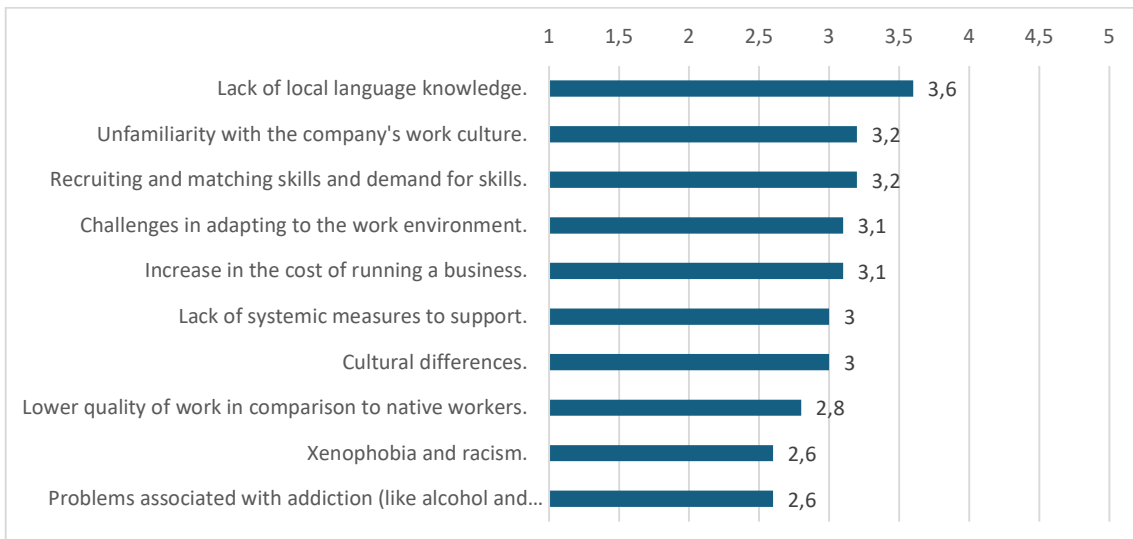


N=46

Source: Own calculations based on the survey

The main problems that respondents believe make it difficult to employ workers from third countries in Bulgaria are: lack of knowledge of the local language, lack of knowledge of the company's work culture and recruitment and combination of in-demand and actual skills. (figure 6).

**Figure 6: Potential problems related to employing third-country workers (1 = fully disagree, 5 = fully agree)**

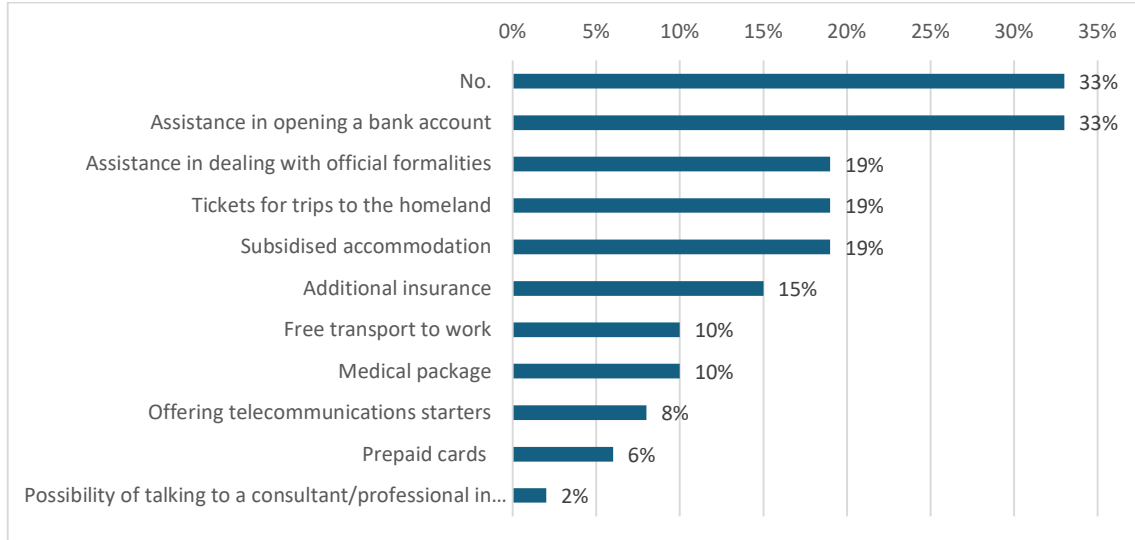


N=82

Source: Own calculations based on the survey

One-third of Bulgarian companies do not offer facilities to hired workers from third countries, the same number provide assistance in opening a bank account and 19% provide assistance in settling official formalities (Figure 7).

**Figure 7: Amenities offered to third-country workers**

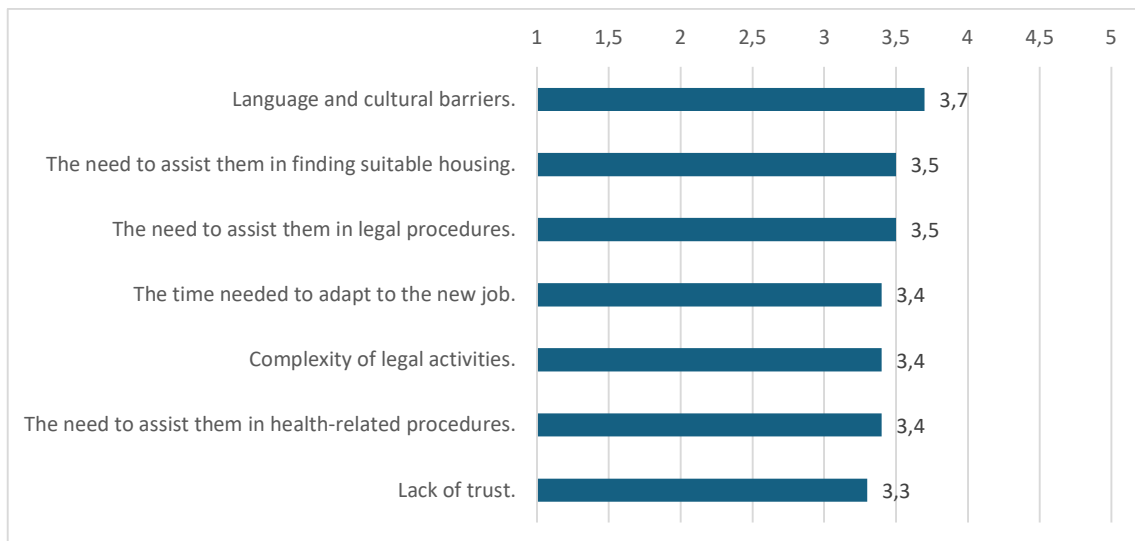


N=48

Source: Own calculations based on the survey

The main difficulties that Bulgarian companies face in hiring workers from third countries are language and cultural barriers, the need to provide assistance in finding suitable housing and the implementation of legal procedures. The time needed to adapt, legal difficulties and the need for assistance in performing health procedures are also significant challenges. The lack of trust turns out to be a less significant barrier (Figure 8).

**Figure 8: Barriers in employing third-country workers (1 = fully disagree, 5 = fully agree)**

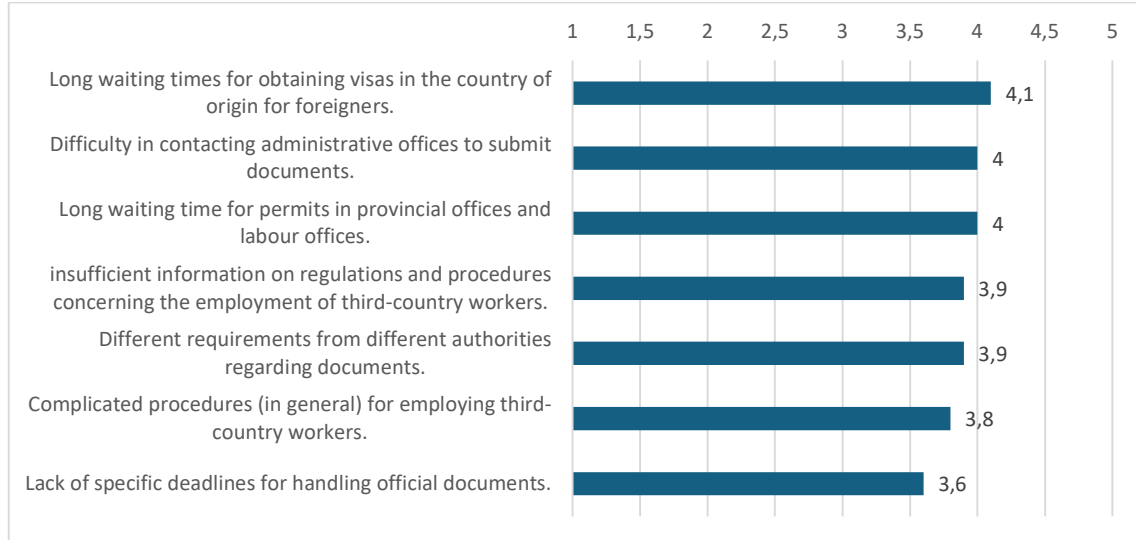


N=76

Source: Own calculations based on the survey

Regarding the difficulties encountered by Bulgarian companies in hiring workers from third countries, obtaining visas, permits and difficulties in contacting administrative offices stand out, which extend the deadline for settling the formalities of the procedures (Figure 9).

**Figure 9: Formal barriers that are related to legal activities (1 = fully disagree, 5 = fully agree)**

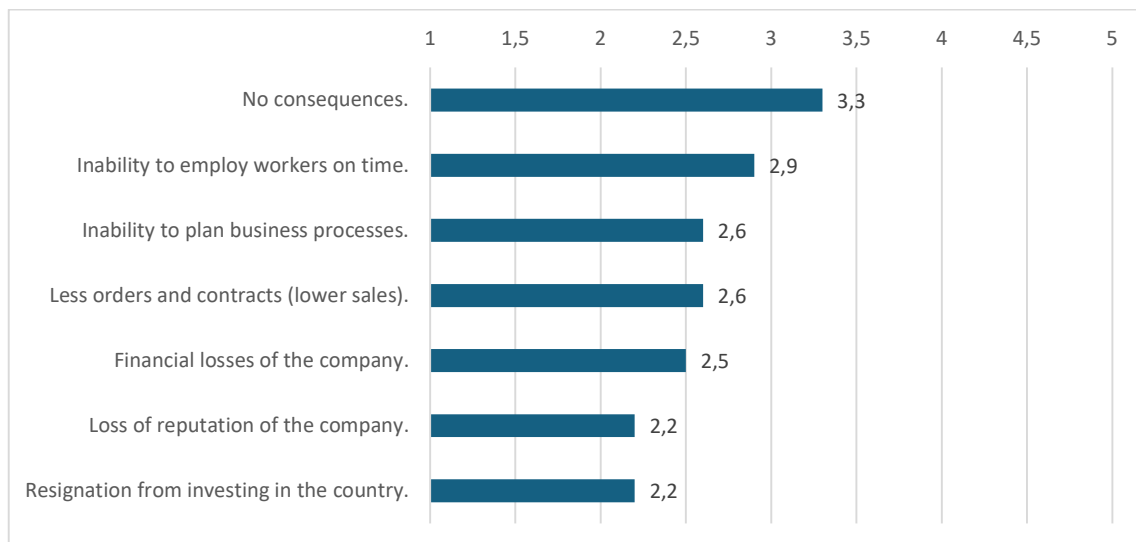


N=30

Source: Own calculations based on the survey

As a result of the above-mentioned extended procedures, companies mostly agree that the obstacles companies face when employing third-country workers have no consequences, followed by the opinion that it causes the inability to employ workers on time. In general, respondents disagree that obstacles caused resignation from investing in the country or loss of the company's reputation. (Figure 10).

**Figure 10: Consequences of obstacles that companies face when employing third-country workers (1 = fully disagree, 5 = fully agree)**



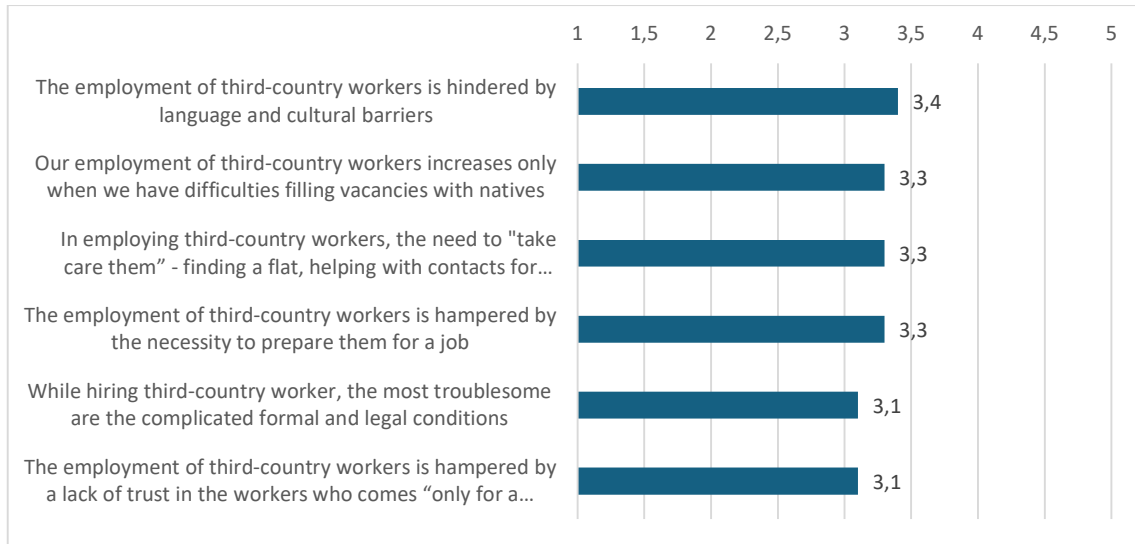
N=70

Source: Own calculations based on the survey



Companies in Bulgaria consider language and cultural barriers to be a major problem when hiring third-country workers (Figure 11). Statements that employment of third-country workers increases only when they have problems filling vacancies with natives, that they have to take care of them and that the employment is hampered by the necessity to prepare them for a job received reached a high level of support.

**Figure 11: Evaluation of statements regarding the employment of third-country workers (1 = fully disagree, 5 = fully agree)**

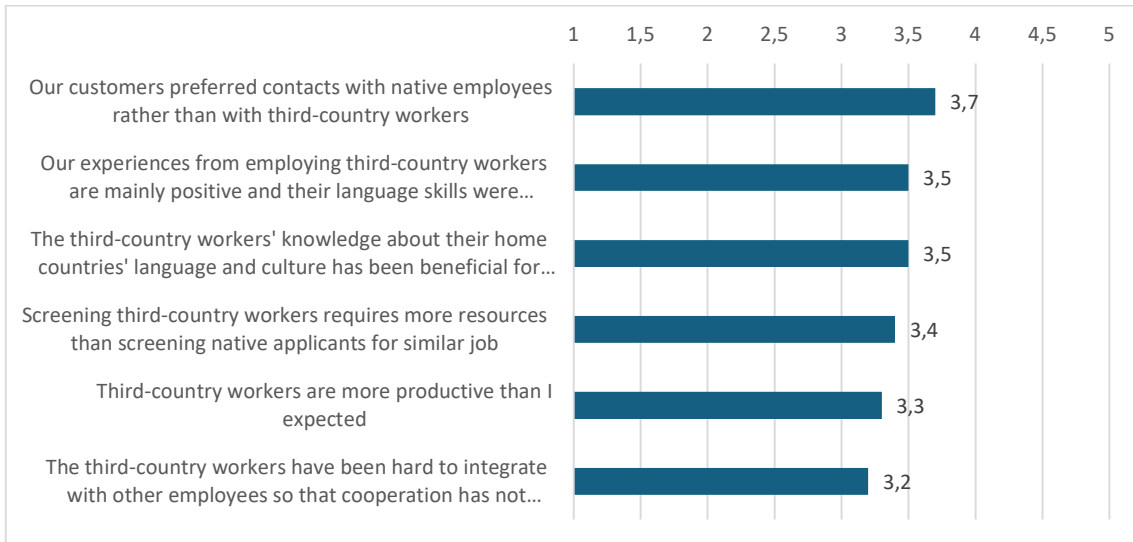


N=46

Source: Own calculations based on the survey

In general, customers of Bulgarian companies prefer that the goods and services offered to them are not made by third-country workers, although the employers' experience is mostly positive and the language skills of third-country workers are sufficient to do their job well (Figure 12). Another interesting fact is that Bulgarian companies do not consider that workers from third countries were difficult to integrate with other employees.

**Figure 12: Experiences with employing third-country employees (1 = fully disagree, 5 = fully agree)**



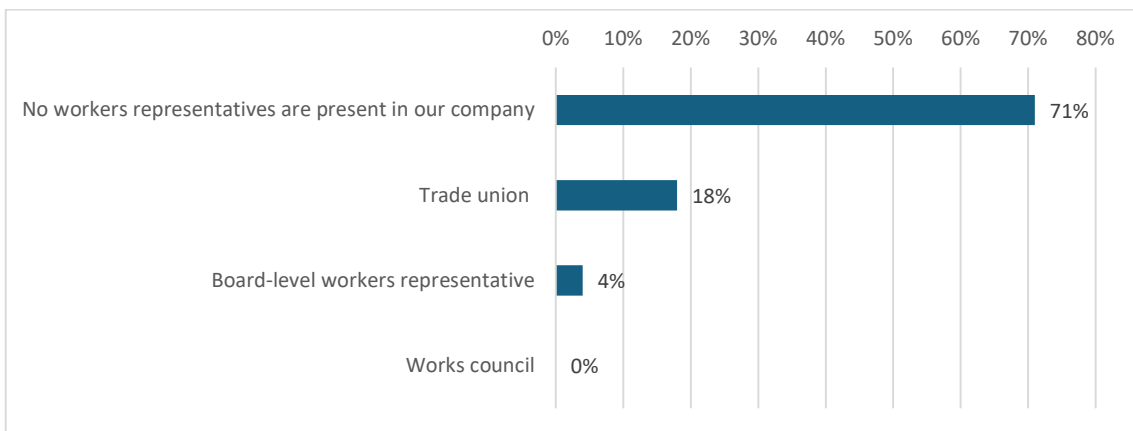
N=43

Source: Own calculations based on the survey

### 1.7. Workers' representation in companies

The survey included questions about workers' representation in the decision-making process and the intention to include topics related to third-country workers in the stakeholders' discussion. The surveyed companies are dominated by a lack of workers' representation, with less than a fifth of them having a trade union (Figure 13).

**Figure 13: Workers' representation in companies**

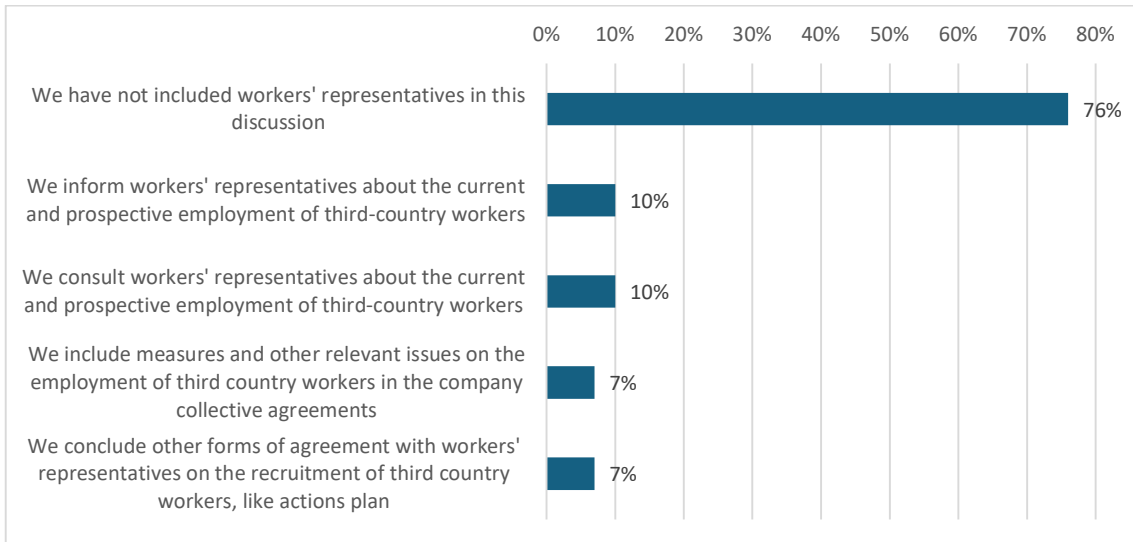


N=28

Source: Own calculations based on the survey

Three-quarters of companies that have some form of worker representation did not include these representatives in the discussion of challenges related to third-country workers (Figure 14). The same applies to their future plans (Figure 15).

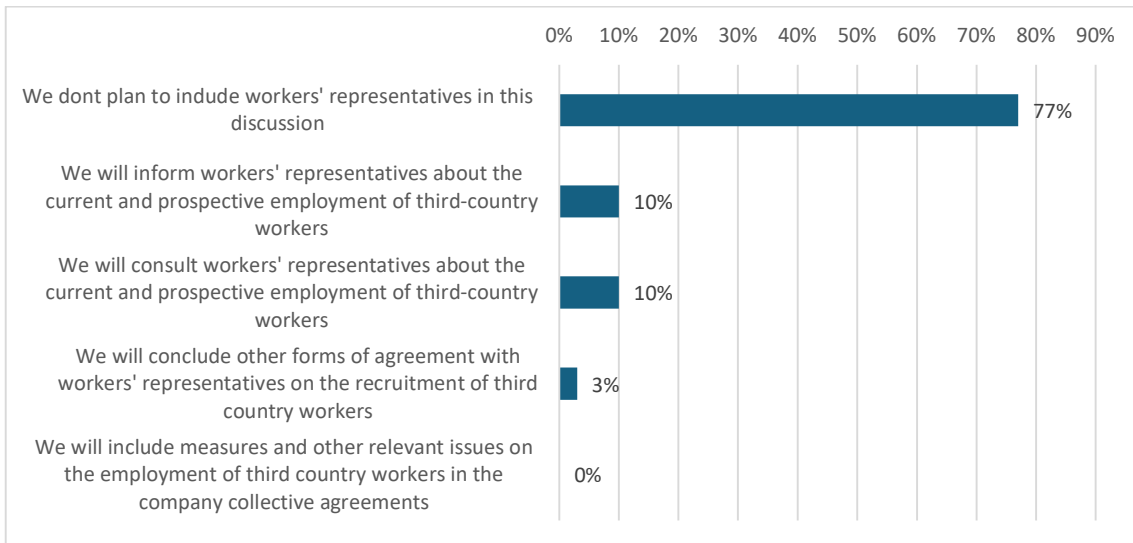
**Figure 14: Dealing with the challenges related to third-country workers**



N=29

Source: Own calculations based on the survey

**Figure 15: Plans to deal with the challenges related to third-country workers**



N=31

Source: Own calculations based on the survey

The survey shows that the majority (72%) of companies are not aware of the social partners' discussions on employment and challenges related to third-country workers at the sectoral and national level. A small proportion of them (16%) are familiar with the discussions but do not know what it is about.

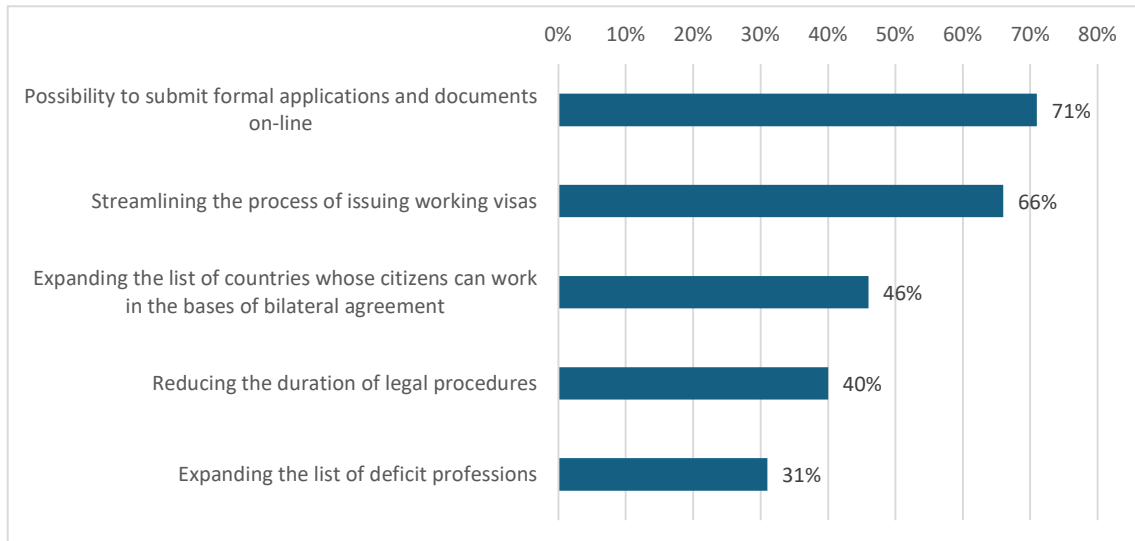
## 1.8. Gaps in supporting the employment of third-country nationals

The shortage of workers makes it difficult for companies to operate, which is why they are making significant efforts to implement various training and qualification measures to support the integration into the labour market of workers from third countries. Respondents identified the fight against overskilling as areas with the most significant gaps, the use of digital tools and the recognition of qualifications/skills assessment. The language barrier is proving to be a significant barrier to the integration of third-country workers, with respondents noting significant gaps in the provision of additional language courses, computer literacy and communication skills. The main gaps that respondents point out in terms of information and consulting are career development, increasing knowledge about the labour market and IT programs/applications.

Bulgarian companies consider that, despite their efforts, there are significant gaps in terms of preventing discrimination, raising awareness of diversity in the workplace and providing civic/social and cultural orientation courses.

The main priorities for facilitating the employment of third-country nationals, according to the surveyed companies from Bulgaria, should be: providing the opportunity to submit formal applications and documents online, streamlining the process of issuing work visas and expanding the list of countries whose nationals can work under a bilateral agreement (Figure 16).

**Figure 16: Proposed changes in regulations to facilitate third-country workers employment**



N=35

Source: Own calculations based on the survey

## 2. Recruit4Tomorrow - Доклад за проучване, проведено в България

През последните години в България се наблюдава недостиг на работна ръка и трудности за набавяне на подходящ персонал от предприятието. Началото на кризата с персонала в страната може да се търси много назад в годините с прехода от планова към пазарна икономика, спада на индустриалното производство и последвалата емиграция. Демографската криза в България и цяла Европа доведе до значително намаление на населението в трудоспособна възраст. Друг ключов фактор за промяна на пазара на труда беше пандемията и настъпилите в резултат от това трансформация на работното място, промени в заплащането и трудности при съвместяването на личен и професионален живот.

Посочените фактори наложиха търсенето на решение на проблема с работната ръка чрез наемане на работници от трети страни. Тук е редно да упоменем, че това е свързано с преодоляване на някои стереотипи и предразсъдъци, наслоени с години от работодателите. Фактите показват, че въпреки това, все по-често, те се насочват към тази алтернатива. Целта на настоящото проучване беше да се идентифицират пречките и предизвикателствата при наемане работници от трети страни.

Проучването е проведено чрез онлайн анкета в периода 22 април – 30 юни 2024 година и включва 102 български предприятия, които са дали пълни или частични отговори на въпроси, свързани с наемането на граждани на трети страни. В първата част на доклада е представено кратко обобщение на характеристиките на участвалите предприятия, текущото състояние при наемане на работници от чужбина и трети страни, техния произход и заплатите им. Втората част разглежда предимствата и пречките пред наемането на работници от трети държави, тяхното представителство и пропуските в подкрепа на тяхната заетост.

### 2.1. Характеристика на предприятията

Характеристиките на предприятията, включени в проучването, са показани в Таблица 1.

Таблица 1: Размер на предприятието, класификация и отрасъл

		Честота	Процент
<b>Размер (брой работници) (N = 98)</b>	По-малко от 10	13	13%
	11-50	32	33%
	51-250	29	30%
	251-500	13	13%
	Повече от 500	11	11%
<b>Класификация на фирмите (N = 86)</b>	Семейна фирма	10	12%
	Местно частно предприятие	54	63%



	Местно публично предприятие	6	7%
	Дъщерно дружество на мултинационална компания	4	5%
	Друго	12	14%
<b>Промишленост (N = 96)</b>	Строителство	19	20%
	Хотелиерство и туризъм	12	13%
	Здравеопазване	4	4%
	Производство	7	7%
	Петролен и газов сектор	0	0%
	Автомобилен сектор	2	2%
	Сектор на ИКТ (ИТ)	33	34%
	Търговия	2	2%
	Други услуги	17	18%

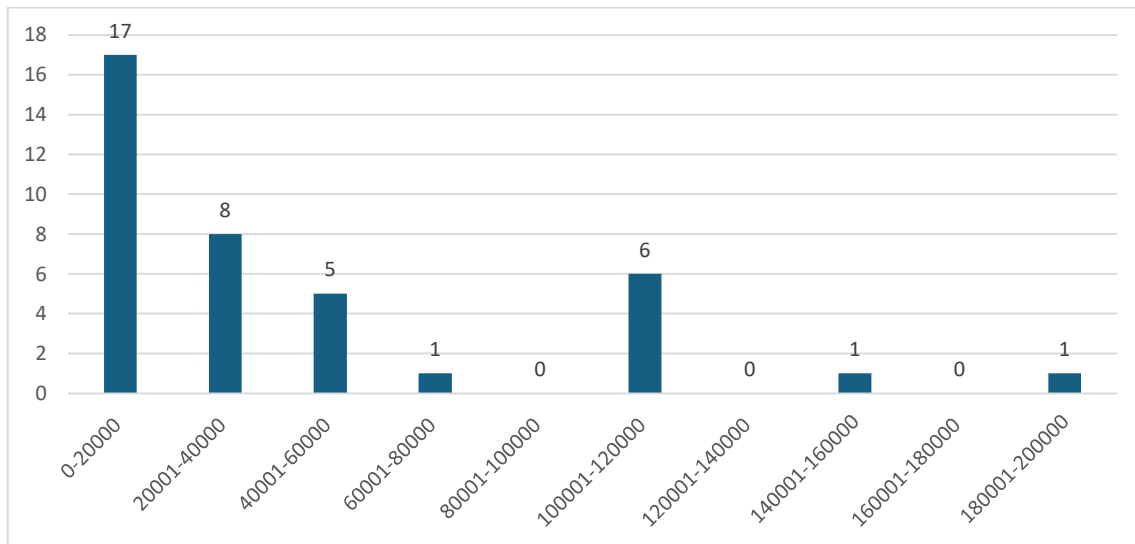
Източник: Собствени изчисления въз основа на проучването

Средната добавена стойност на работник в България през 2023 г. е 46 525,6 евро, сочат данните от изследването. Стойностите варират в много широк диапазон, но по-голямата част от респондентите, отговорили на този въпрос, посочват стойности до 40 000 EUR (фигура 1).

Освен това средната брутна заплата, посочена от анкетираните предприятия, е 1824,7 евро на месец, което е с почти 80% по-високо в сравнение със средната брутна заплата в България през 2023 г. (около 1 022,58 евро). Най-високите средни заплати са регистрирани в град София, където средната брутна месечна заплата достига 2 722 лв. (около EUR 1,391.74)<sup>2</sup>.

<sup>2</sup> [Bulgaria: Statistics institute announces average annual salaries in 2023 – The Sofia Globe](#)

**Фигура 1: Добавена стойност на работник (годишно, в евро) през 2023 г.**



N=39

Източник: Собствени изчисления въз основа на проучването

В проучването са включени представители на предприятия, заемащи различни длъжности, като две трети от тях са представители на управленски екипи, следвани от професионалисти в отдели за човешки ресурси (Таблица 2). Повечето от анкетираните са мъже.

**Таблица 2: Позиция на респондентите в предприятието**

	Честота	Процент
Изпълнителен директор / Директор / Член на Управителния съвет	24	27%
Ръководител човешки ресурси	11	12%
Специалист по човешки ресурси	12	13%
Ръководител на правен отдел	1	1%
Юрист	0	0%
Друго	42	47%

N=90

Източник: Собствени изчисления въз основа на проучването

Освен това всички респонденти имат най-малко 5 години професионален опит, а повечето от тях имат повече от 15 години в съответните си области (таблица 3).

**Таблица 3: Продължителност на трудовия стаж на респондентите**

	Честота	Процент
По-малко от 5 години	8	9%
5 - 15 години	39	42%
16 - 25 години	30	33%
26 - 35 години	14	15%
Повече от 35 години	1	1%

N=92

Източник: Собствени изчисления въз основа на проучването

## 2.2. Заетост на чуждестранни работници – текуща ситуация

Мнозинството, а именно 84% от анкетираните предприятия, съобщават, че в момента наемат чуждестранни работници (Таблица 4). Половината от анкетираните съобщават, че наемат чуждестранни работници от държави извън ЕС.

**Таблица 4: Заетост на чуждестранни работници**

	Честота	Процент
Да	81	84%
Не	15	16%

N=96

Източник: Собствени изчисления въз основа на проучването

Проучването също така изследва нагласите на онези предприятия, които понастоящем не наемат чуждестранни работници (Таблица 5), включително въпроси за бъдещите им планове за наемане на чуждестранни работници. От тези респонденти 90% (21 респонденти) планират да наемат чуждестранни работници в бъдеще. По-конкретно, повече от половината от респондентите са посочили, че планират да наемат работници от трети държави. Само 10% (2 респонденти) не планират да наемат чуждестранни работници в бъдеще.

**Таблица 5: Стратегия за наемане на чуждестранни работници в бъдеще**

	Честота	Процент
Планираме да наемем чуждестранни работници в бъдеще (от страни от ЕС)	8	38%
Планираме да наемем работници от трети държави в бъдеще	11	52%
Не планираме да наемаме чуждестранни работници в бъдеще	2	10%

N=21

Източник: Собствени изчисления въз основа на проучването



### 2.3. Заетост на работници от трети държави (извън ЕС)

Резултатите по отношение на броя на работниците от трети държави, които в момента работят в предприятията, са интересни. Една четвърт от анкетираните съобщават, че по-малко от 5 % от работната им сила се състои от работници от трети държави, а една пета съобщават, че техният дял е между 6 % и 10 %. По-специално, 25 % от предприятията имат повече от 20 % граждани на държави извън ЕС в работната си сила (таблица 6). Тези предприятия работят в строителството, производството и други услуги.

**Таблица 6: Разпределение на работниците от трети държави в работната сила на изследваните предприятия**

	Честота	Процент
По-малко от 5 % от общата работна сила	13	24%
6-10%	11	20%
11-15%	7	13%
16-20%	13	24%
Повече от 20%	9	17%
Не знам точно	1	2%

N=54

Източник: Собствени изчисления въз основа на проучването

Сравнявайки нивото на образование на работниците от трети страни, можем да кажем, че въпреки че има голямо разнообразие в резултатите, основният дял от тях имат средно и висше образование. Респондентите считат, че образователната структура на работниците от трети държави е сравнима с тази на общата работна сила в предприятието (67 %). 22 % от тях обаче считат, че работниците от трети държави имат по-ниско ниво на образование (таблица 7). Възрастовата структура на работниците от трети страни в изследваните предприятия показва, че по-голямата част от тях са на възраст между 31 и 40 години.

**Таблица 7: Ниво на образование на работниците на предприятието в сравнение с тези от трети държави**

	Честота	Процент
Сравнимо	34	67%
Средно работниците от трети държави имат по-ниско образование.	11	22%
Средно работниците от трети държави имат висше образование.	1	2%
Трудно е да се отговори	4	8%

N=51

Източник: Собствени изчисления въз основа на проучването

Работниците извън ЕС са заети главно за работа в сферата на услугите (11 %) и обща работа (14 %), следвани от тези в производството и професионалните и техническите дейности (таблица 8). Що се отнася до някои от другите видове работа, която

работниците извън ЕС извършват, респондентите съобщават за строителство, програмиране, социална работа, готвене, информационни технологии и др.

**Таблица 8: Видове работа на работниците от трети държави**

	Честота	Процент
Работа в услугите (продажби, лична хигиена, защитни услуги, лични услуги и др)	7	11%
Професионална и техническа работа (здравни услуги, правни и други професионални услуги, научни и инженерни професионални услуги и др.)	6	10%
Производствена работа	8	13%
Обща работа (почистване, селско стопанство, риболовни и горски услуги, помощ за приготвяне на храна и др.)	9	14%
Управленска работа	3	5%
Друго	29	47%

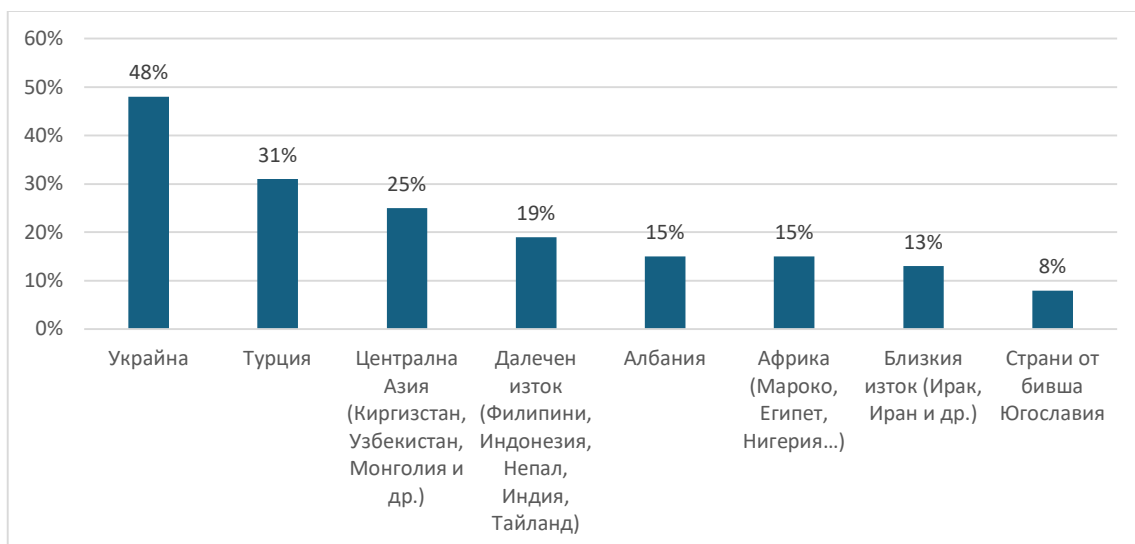
N=62

Източник: Собствени изчисления въз основа на проучването

#### 2.4. Произход на работниците от трети държави

Анкетираните предприятия посочват, че в България работници от трети страни идват предимно от Украйна и Турция. Значителен брой работници от трети държави са от страни от Далечния изток като Непал и Тайланд, както и от Централна Азия (фигура 2).

**Фигура 2: Произход на работниците от трети държави**



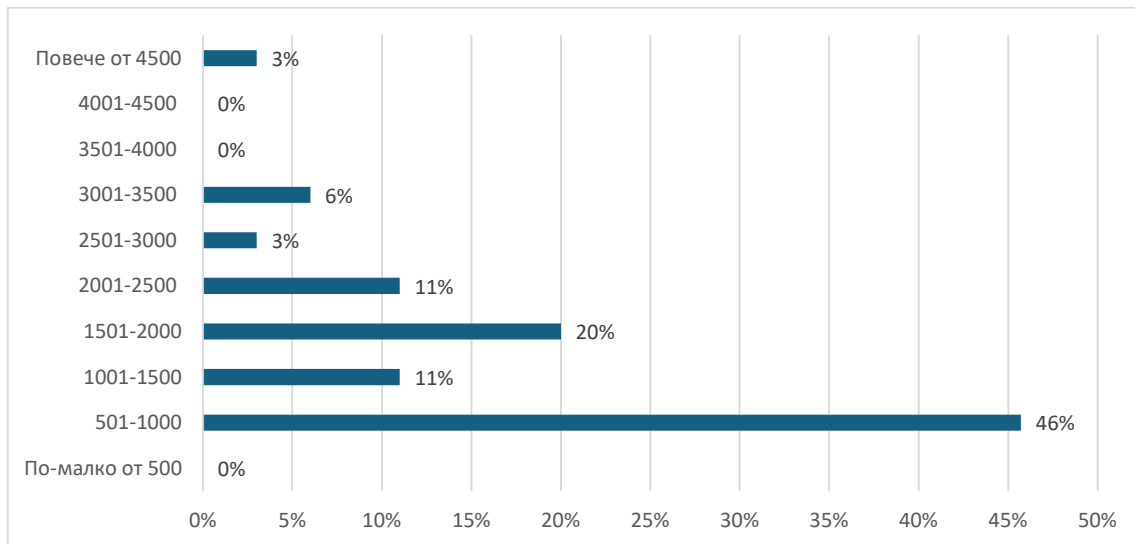
N=52

Източник: Собствени изчисления въз основа на проучването

## 2.5. Заплати на работници от трети държави

Според получените резултати средната брутна заплата на работниците от трети страни в изследваните предприятия е 1505,4 EUR. Сравнявайки този резултат с данните, получени за средната работна заплата в същите предприятия, можем да кажем, че средната брутна заплата на работниците от трети страни е по-ниска. Фигура 3 илюстрира разпределението на средните брутни заплати (на месец, в евро), изплащани на работници от трети държави в изследваните предприятия.

**Фигура 3: Разпределение на средните брутни заплати, изплащани на работници от трети държави (на месец, в евро)**



N=35

Източник: Собствени изчисления въз основа на проучването

Независимо от разликата в средните заплати, мнозинството от предприятията смятат, че заплатите на работниците от трети страни са сравними с тези на останалите им служители (таблица 9).

**Таблица 9: Качествено сравнение на средните брутни заплати на работниците от трети държави с тези на другите работници в същото предприятие**

	Честота	Процент
По-ниски	6	12%
Сравними	43	86%
По-високи	1	2%
Не знам	0	0

N=50

Източник: Собствени изчисления въз основа на проучването

Само едно от анкетираните предприятия е заявило, че е получило субсидия за наемане на работници от трети държави, на които други работници нямат право. Получената субсидия е била в рамките на еднократна програмна дейност на Върховния комисариат

на ООН за бежанците за финансиране на стартиращи предприятия. Тази програма е била насочена към бежанци и вече не е активна.

## 2.6. Предимства и пречки при наемането на работници от трети държави

Основните предимства, които предприятията виждат в наемането на граждани на трети страни, са придобиване на работници, които са по-гъвкави в адаптирането на работното си време (работа на смени, нощен труд и т.н.), притежават желаните компетенции, стабилност на работната сила поради нестабилността на продажбите (поръчките) и познаване на пазара и културата на страните/регионите на техния произход. Те не смятат, че намаляването на разходите е предимство при наемането на работници от трети държави (фигура 4).

**Фигура 4: Предимства при наемането на работници от трети държави (1 = напълно несъгласен, 5 = напълно съгласен)**



N=15

Източник: Собствени изчисления въз основа на проучването

Така или иначе една от основните причини, поради които предприятията решават да наемат чуждестранни работници, е липсата на местни работници и осигуряването на работници с подходящи компетенции (фигура 5).

**Фигура 5: Причини за наемане на работници от трети държави (1 = напълно несъгласен, 5 = напълно съгласен)**



N=46

Източник: Собствени изчисления въз основа на проучването

Основните проблеми, които анкетираните смятат, че затрудняват наемането на работници от трети страни в България са: непознаването на местния език, непознаване на културата на работа на компанията и набиране и съчетаване на търсени и действителни умения (фигура 6).

**Фигура 6: Потенциални проблеми, свързани с наемането на работници от трети страни (1 = напълно несъгласен, 5 = напълно съгласен)**

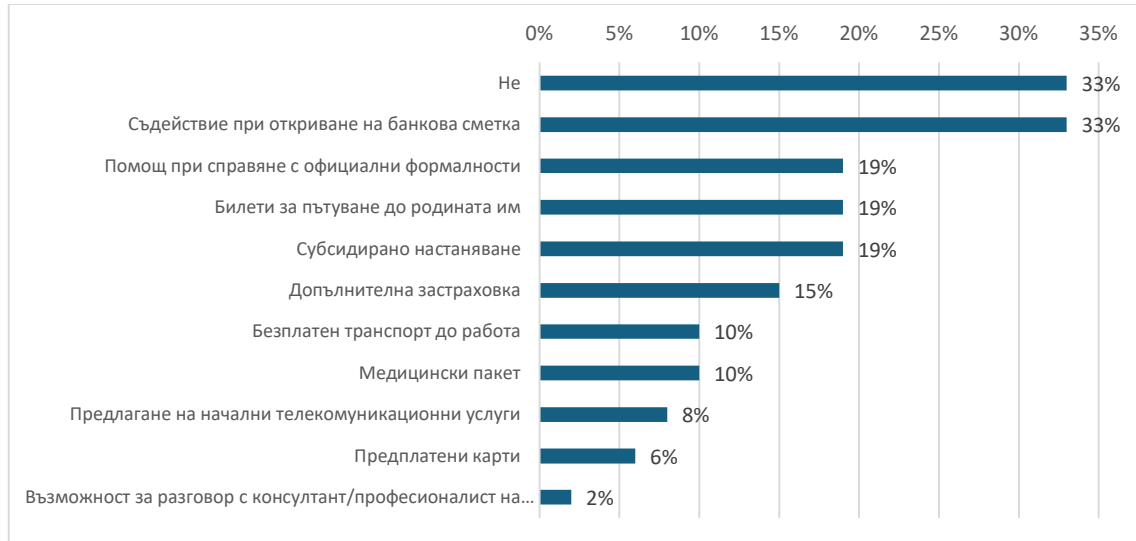


N=82

Източник: Собствени изчисления въз основа на Проучването

Една трета от българските предприятия не предлагат улеснения на наеманите работници от трети страни, също толкова оказват помощ при откриване на банкова сметка и 19% оказват помощ при уреждане на официалните формалности (Фигура 7).

**Фигура 7: Улеснения, предлагани на работниците от трети страни**



N=48

Източник: Собствени изчисления въз основа на проучването

Основните трудности, които срещат българските фирми при наемане на работници от трети страни са езиковите и културни бариери, необходимостта от оказване на помощ при намиране на подходящо жилище и при изпълнение на правните процедури. Времето, необходимо за адаптация, правните трудности и нуждата от помощ при изпълнение на здравните процедури също са значителни предизвикателства. Липсата на доверие се оказва не толкова значима бариера (Фигура 8).

**Фигура 8: Пречки пред наемането на работници от трети страни (1 = напълно несъгласен, 5 = напълно съгласен)**



N=76

Източник: Собствени изчисления въз основа на проучването

Относно трудностите, които срещат българските предприятия при наемане на работници от трети страни се открояват визовите и административни проблеми, които удължават срока за уреждане на формалностите по процедурите (Фигура 9).

**Фигура 9: Формални пречки, свързани с правни дейности (1 = напълно несъгласен, 5 = напълно съгласен)**



N=30

Източник: Собствени изчисления въз основа на проучването

В резултат от посочените по-горе удължени процедури, предприятията до голяма степен са съгласни, че пречките, пред които са изправени фирмите при наемането на работници от трети държави, нямат последствия, последвано от мнението, че това води до невъзможност за наемане на работници навреме. Като цяло респондентите не са съгласни, че пречките са довели до отказ от инвестиции в страната или загуба на репутацията на компанията (Фигура 10).

**Фигура 10: Последици от пречките, с които се сблъскват предприятията при наемането на работници от трети държави (1 = напълно несъгласен, 5 = напълно съгласен)**



N=70

Източник: Собствени изчисления въз основа на проучването

Предприятията в България считат езиковите и културните бариери за основен проблем при наемането на работници от трети страни (фигура 11). Твърденията, че заетостта на работници от трети държави се увеличава само когато имат проблеми със запълването на свободните работни места с местни жители, че трябва да се грижат за тях и че заетостта е възпрепятствана от необходимостта да бъдат подготвени за получена работа, получиха високо равнище на подкрепа.

**Фигура 11: Оценка на становищата относно наемането на работници от трети страни (1 = напълно несъгласен, 5 = напълно съгласен)**



N=46

Източник: Собствени изчисления въз основа на проучването

Като цяло, клиентите на българските предприятия предпочитат стоките и услугите, които им се предлагат, да не са изработени от работници от трети страни, въпреки че опитът на работодателите е предимно положителен и езиковите умения на работниците от трети страни са достатъчни, за да се справят добре с работата си (фигура 12). Друг интересен факт е, че българските предприятия не считат, че работниците от трети държави са били трудни за интегриране с останалите служители.



**Фигура 12: Опит с наемането на работници от трети държави (1 = напълно несъгласен, 5 = напълно съгласен)**



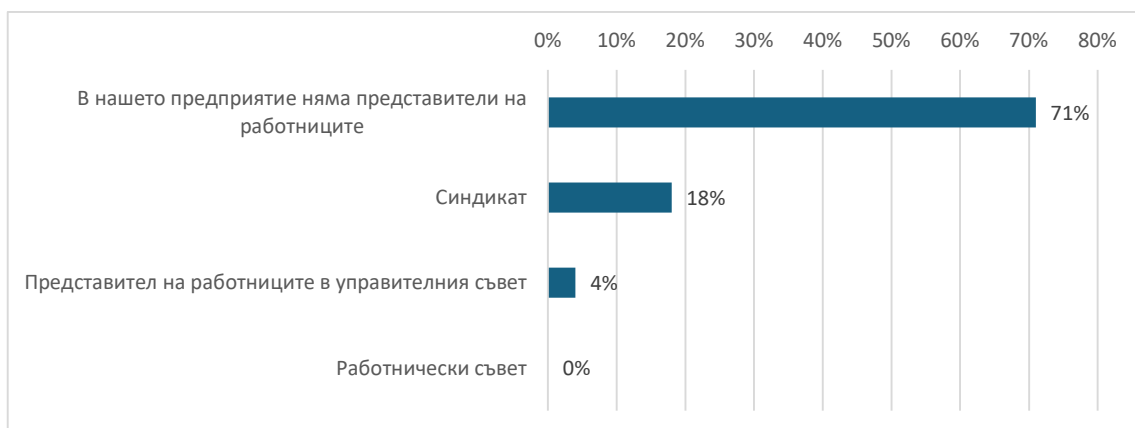
N=43

Източник: Собствени изчисления въз основа на проучването

## 2.7. Представителство на работниците в предприятията

В анкетата бяха включени въпроси относно представителството на работниците в предприятията и намеренията за включване на работниците от трети страни в синдикалния живот на предприятията. В анкетираните предприятия преобладава отсъствие на представителство на работниците, в по-малко от една пета част от тях присъства синдикат (фигура 13).

**Фигура 13: Представителство на работниците в предприятията**



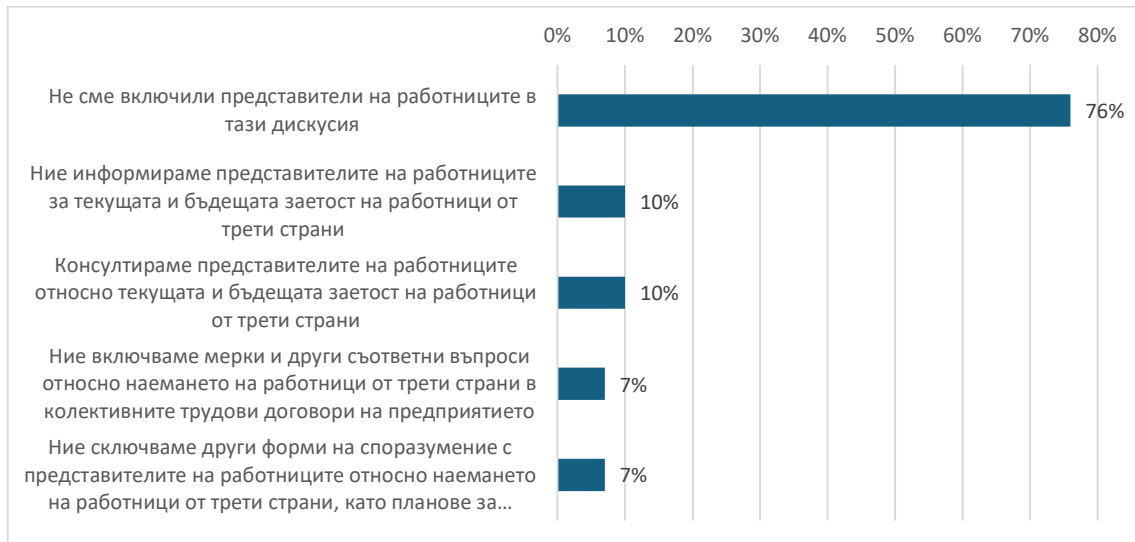
N=28

Източник: Собствени изчисления въз основа на проучването

Три четвърти от фирмите, които имат някаква форма на представителство на работниците не са включили тези представители в обсъждането на

предизвикателствата, свързани с работниците от трети държави (фигура 14). Същото важи и за бъдещите им планове (фигура 15).

**Фигура 14: Справяне с предизвикателствата, свързани с работниците от трети държави**



N=29

Източник: Собствени изчисления въз основа на проучването

**Фигура 15: Планове за справяне с предизвикателствата, свързани с работниците от трети държави**



N=31

Източник: Собствени изчисления въз основа на проучването

От анкетата става ясно, че по-голямата част (72%) от предприятията не са запознати с дискусии на социалните партньори относно заетостта и предизвикателствата, свързани с работниците от трети страни, на секторно и национално равнище. Малка част от тях (16 %) са запознати с дискусии, но не знаят за какво става въпрос.

## 2.8. Пропуски в подпомагането на заетостта на граждани на трети страни

Недостигът на работници затруднява дейността на фирмите, поради което те полагат значителни усилия за прилагане на различни мерки за обучение и квалификация в подкрепа на интеграцията на пазара на труда на работници от трети държави. Анкетираните посочват като области с най-значителни пропуски използването на цифрови инструменти и признаването на квалификацията/оценка на уменията. Езиковата бариера се оказва значителна пречка за интегрирането на работници от трети страни, като анкетираните отбелязват значителни пропуски в осигуряването на допълнителни езикови курсове, компютърна грамотност и комуникационни умения. Основните пропуски, които респондентите сочат по отношение на информирането и консултирането са кариерното развитие, повишаването на знанията за пазара на труда и ИТ програмите/приложенията

Българските предприятия считат, че въпреки положените усилия от тях съществуват значителни пропуски по отношение на предотвратяване на дискриминацията, повишаване на осведомеността относно многообразието на работното място и осигуряването на курсове за гражданска/социална и културна ориентация. Основни приоритети за улесняване на наемането на работа на граждани на трети държави, според анкетираните предприятия от България, трябва да бъдат: предоставянето на възможност за подаване на официални заявления и документи онлайн, рационализирането на процеса на издаване на работни визи и разширяване на списъка с държави, чиито граждани могат да работят в рамките на двустранно споразумение (фигура 16).

**Фигура 16: Предложени промени в нормативната уредба за улесняване на наемането на работници от трети държави**



N=35

Източник: Собствени изчисления въз основа на проучването



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**RECRUIT4TOMORROW**

**Encouraging employment of third-country nationals  
through social dialogue**

**Deliverable D2.1**

**National Analysis Report for Croatia**

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## **Executive summary**

The deliverable, National Analysis Report for Croatia, presents the findings from the survey amongst Croatian employers regarding the employment of third-country nationals in Croatia which was executed as part of the WP2 in the project. In the scope of WP2, we analysed and researched the challenges that labour market stakeholders are facing when dealing with the matching of labour supply and demand by employment of third-country nationals.

The presented deliverable is a detailed report from the national survey results in Croatia which will be a basis and a starting point for further analysis and social dialogue on all levels in WP3 where the consortia partners will prepare measures to address the labour market needs and recommendations for policymakers. The first part of the deliverable presents the national survey report in English and the second part (Chapter 2) presents the Croatian translation.

## 1. Recruit4Tomorrow - Survey report on Croatia

The survey report presents insights based on descriptive statistics from a sample of Croatian firms. Conducted between April 22 and June 30, 2024, the survey received complete or partial responses from 90 companies regarding the employment of third-country nationals. The report begins with a brief summary of the sample characteristics, the current state of employing foreign and third-country workers, their origins, and their wages. The second part delves into the advantages and barriers of employing third-country workers, their representation, and the gaps in support for their employment.

### 1.1. Sample characteristics

The characteristics of the companies included in the sample are shown in Table 1.

**Table 1: Company size, classification and industry**

		Frequency	Percent
<b>Size (number of workers) (N = 90)</b>	Less than 10	7	8 %
	11-50	21	23 %
	51-250	16	18 %
	251-500	16	18 %
	More than 500	30	33 %
<b>Company classification (N = 87)</b>	Family-owned company	15	17 %
	Domestic private company	42	48 %
	Domestic public company	6	7 %
	MNE subsidiary	15	17 %
	Other	9	10 %
<b>Industry (N = 90)</b>	Construction	6	7 %
	Hospitality and tourism	21	23 %
	Healthcare	3	3 %
	Manufacturing	17	19 %
	Oil and gas sector	9	10 %
	Automotive sector	2	2 %
	ICT (IT) sector	8	9 %
	Trade	6	7 %
Other services	18	20 %	

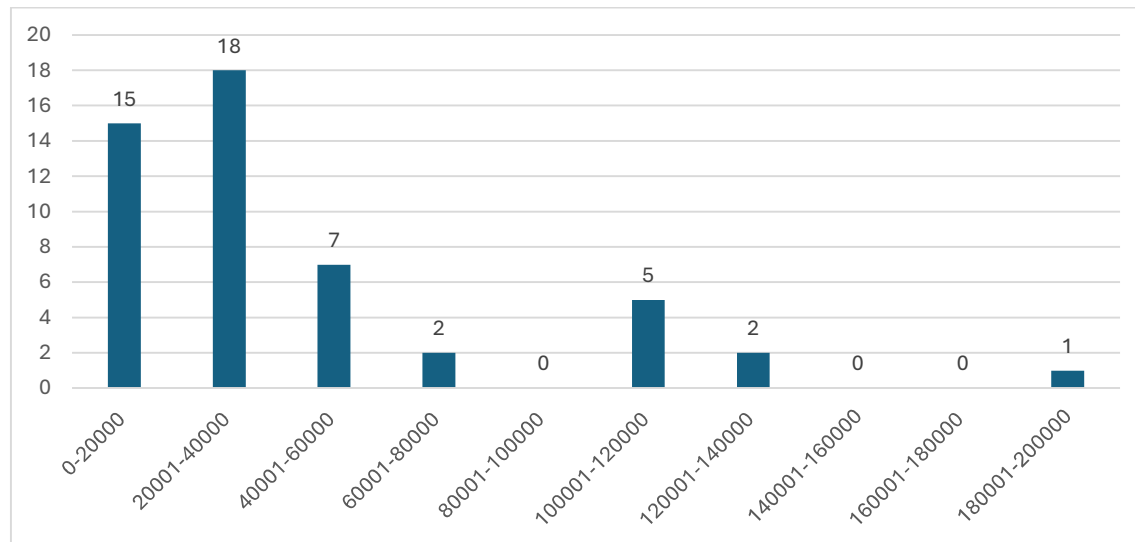
Source: Own calculations based on the survey

In 2023, the average value added per worker among companies surveyed was EUR 43,429.2<sup>1</sup> per year. The distribution of value added per worker among the surveyed companies shows a

<sup>1</sup> Std. deviation: 41,123.1, min: 10,000, max: 200,000

broad spectrum with a concentration in the middle ranges. Most of the respondents fall into the EUR 20,001 to EUR 40,000 range (Figure 1).

**Figure 1: Value added per worker (per year, in EUR) in 2023**



N=50

Source: Own calculations based on the survey

Additionally, the average gross wage reported by the companies surveyed is EUR 1,674.9<sup>2,3</sup> per month. The distribution of average gross salaries among the surveyed companies shows that more than three-quarters (76.2%) of the companies in the sample report an average monthly gross salary below EUR 2,000 per month.

The survey included a wide range of respondents from different positions within their respective organisations (Table 2). The characteristics of the respondents show a significant representation from HR departments and upper management, in line with the focus of the survey. Almost two-thirds of the respondents were female.

**Table 2: Respondent's position in the company**

	Frequency	Percent
CEO / Director / Member of the management board	31	36 %
Head of HR	16	19 %
HR professional	22	26 %
Head of Legal Department	2	2 %
Legal professional	5	6 %
Other	9	11 %

N=85

Source: Own calculations based on the survey

<sup>2</sup> Std. deviation: 1,178.47, min: 248.1, max: 9.126

<sup>3</sup> The average gross wage in Croatia in 2023 was EUR 1.584,00.

In addition, almost all respondents have at least 5 years of work experience, with most having more than 15 years in their respective fields (Table 3).

**Table 3: Duration of working experience of respondents**

	Frequency	Percent
Less than 5 years	5	6 %
5 - 15 years	25	29 %
16 - 25 years	27	31 %
26 - 35 years	21	25 %
More than 35 years	8	9 %

N=86

Source: Own calculations based on the survey

## 1.2. Employment of foreign workers: current situation

The majority, namely, 66 % of the companies surveyed reported that they currently employ foreign workers (Table 4). Almost all respondents who employ foreign workers reported that they employ also non-EU foreign workers.

**Table 4: Employment of foreign workers**

	Frequency	Percent
Yes	59	66 %
No	31	34 %

N=90

Source: Own calculations based on the survey

For those companies that do not currently employ foreign workers (Table 5), their future plans for employing foreign workers were also examined. Of these respondents, 44 % (13 respondents) plan to employ foreign workers in the future. Specifically, 5 of these 13 respondents indicated that they plan to employ third-country workers. Conversely, 50 % (15 respondents) do not plan to employ foreign workers in the future.

**Table 5: Strategy for future employment of foreign workers**

	Frequency	Percent
We plan to employ foreign workers from EU countries in the future	8	27 %
We plan to employ third-country workers in the future	5	17 %
We do not plan to employ any foreign workers in the future	15	50 %
Other	7	23 %

N=30

Source: Own calculations based on the survey

### 1.3. Employment of third-country (non-EU) workers

Looking at the number of non-EU workers currently employed in the companies, 18 % of the respondents reported that less than 5 % of their workforce consisted of non-EU workers, while 14 % reported between 6 % and 10 %. Notably, 10 % of companies have more than 20 % non-EU nationals in their workforce (Table 6). These companies operate in construction, hospitality and tourism and other services (logistics and transport and recruitment agency).

**Table 6: Distribution of third-country workers in the workforce**

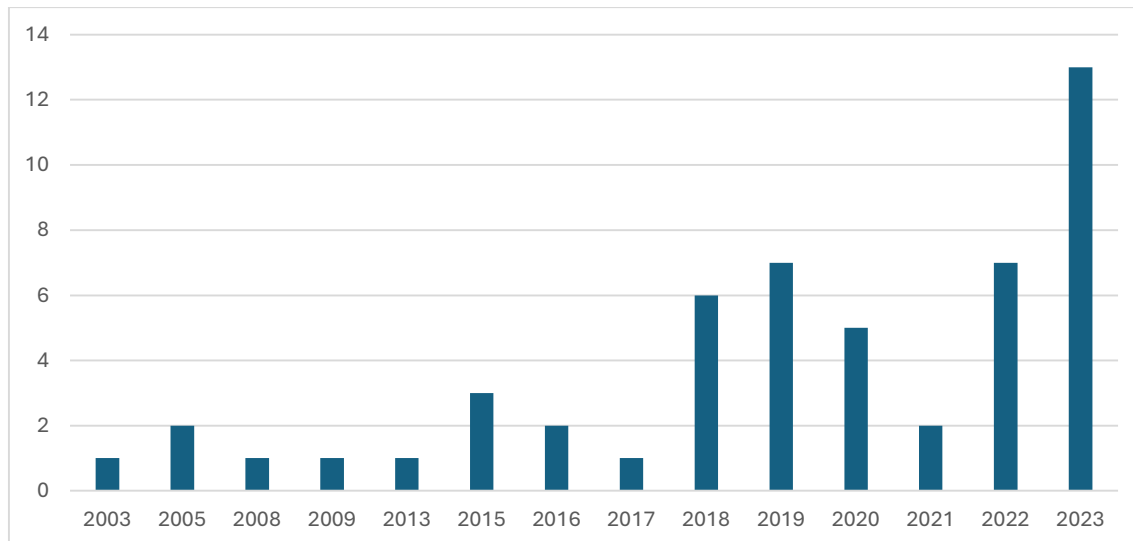
	Frequency	Percent
Less than 5 % of total workforce	16	31 %
6-10 %	13	25 %
11-15 %	5	10 %
16-20 %	7	13 %
More than 20 %	9	17 %
Don't know exactly	2	4 %

N=52

Source: Own calculations based on the survey

Figure 2 shows that while some companies have been employing third-country nationals since 2003, there has been a significant and noticeable increase in this practice since 2018. The data show a steady increase in the number of companies employing third-country nationals over the years, with significant peaks in 2019, 2022 and 2023.

**Figure 2: Number of companies reporting the start of employment for third-country nationals by year**



N=52

Source: Own calculations based on the survey

The results suggest that while the third-country workers in the surveyed companies come from a variety of educational backgrounds, there is a significant representation of those with secondary and tertiary education. Among the 29 surveyed companies that employ these

workers and responded to the question about educational structure, 62.7 % have secondary education and 14.6 % have tertiary education. More than one-quarter of the respondents (28 %) believe that the educational structure of third-country workers is comparable to that of the general workforce in the company. However, 53 % of respondents think that third-country workers have a lower average level of education (Table 7). It is also worth noting that only a third of third-country workers are women. The age structure of third-country workers in the companies surveyed shows that the majority are less than 30 years old (64.4 %).

**Table 7: Company vs. third-country worker educational levels**

	<b>Frequency</b>	<b>Percent</b>
Comparable	11	28 %
On average, third-country workers have lower education.	21	53 %
On average, third-country workers have higher education.	1	3 %
Difficult to answer	6	15 %
Other	1	3 %

N=40

Source: Own calculations based on the survey

More than half of non-EU workers are employed for elementary work (cleaning services, agriculture, fishing and forestry services, food preparation assistance, etc.), followed by service work (Table 8).

**Table 8: Job types of third-country workers**

	<b>Frequency</b>	<b>Percent</b>
Service work (sales, personal care, protective services, personal services, etc)	12	29 %
Professional and technical work (healthcare services, legal and other professional services, science and engineering professional services, etc)	3	7 %
Production work	7	17 %
Elementary work (cleaning services, agriculture, fishing and forestry services, food preparation assistance, etc.)	22	52 %
Managerial work	3	7 %
Other	8	19 %

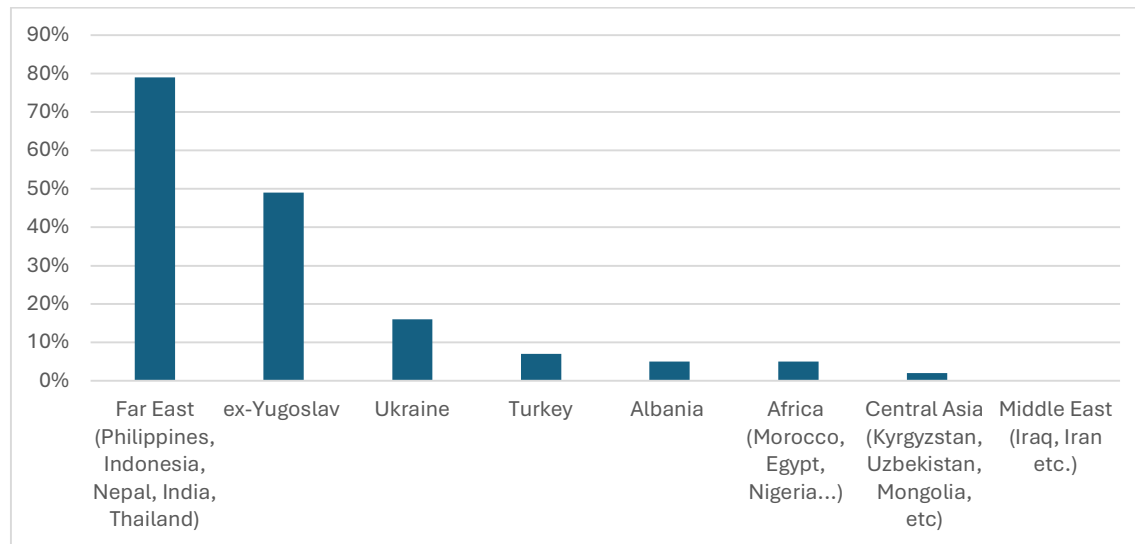
N=42

Source: Own calculations based on the survey

## 1.4. The origin of third-country workers

The survey results indicate that third-country workers predominantly come from the Far East (Philippines, Indonesia, Nepal, India, and Thailand). Additionally, a significant number of third-country workers are from ex-Yugoslav countries (Bosnia and Herzegovina, Serbia, Montenegro, North Macedonia) and Kosovo and Ukraine (Figure 3)<sup>4</sup>.

**Figure 3: The origin of third-country workers**



N=43

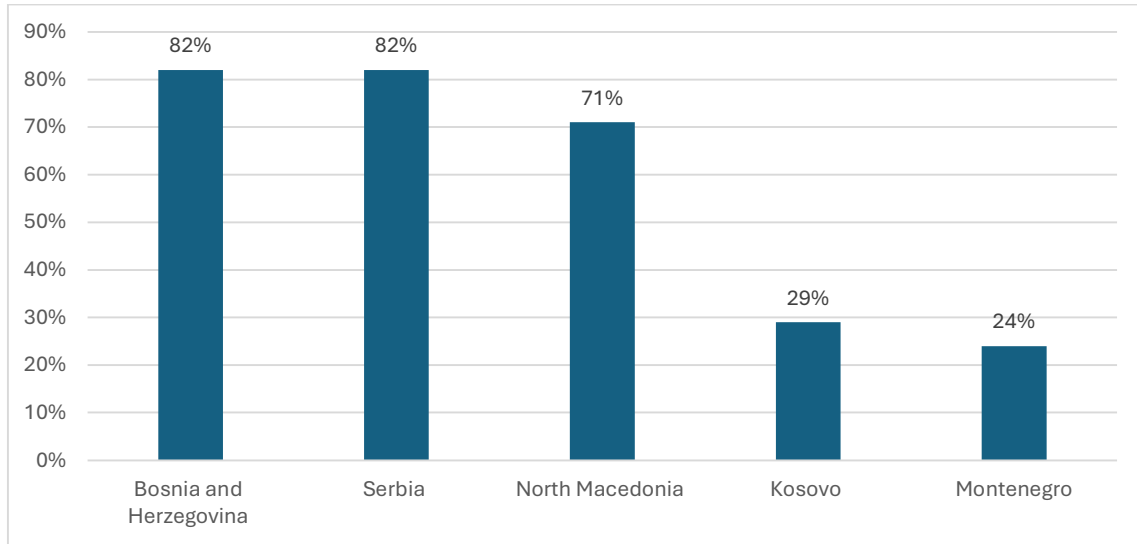
Source: Own calculations based on the survey

Nepal and the Philippines were also stated as the origin countries with the highest share of third-country workers in their workforce by the respondents. What should be emphasized is that this survey shows the trend that is relevant and dominant in the last 3 years in Croatia, with new foreign workers coming from these areas, and especially from South-East Asia. Still, in total numbers, most foreign workers in absolute numbers come from ex-Yugoslav countries – many of them have been active in Croatia for several years already.

When asked which ex-Yugoslav countries the workers originated from, the most common answers were Bosnia and Herzegovina and Serbia (Figure 4).

<sup>4</sup> The share of country of origin mentioned pertains solely to the stock of workers within our sample firms. However, official data on the country of origin for third-country workers who obtained residence and work permits in the first six months of 2024 indicates that 21 % of them were from Bosnia and Herzegovina, 18 % from Serbia and Nepal, and 8.7 % from India. ([Mjesečne statistike srpanj 2024.pdf \(gov.hr\)](#)).

**Figure 4: Origin of third-country workers from non-EU former Yugoslav Countries**



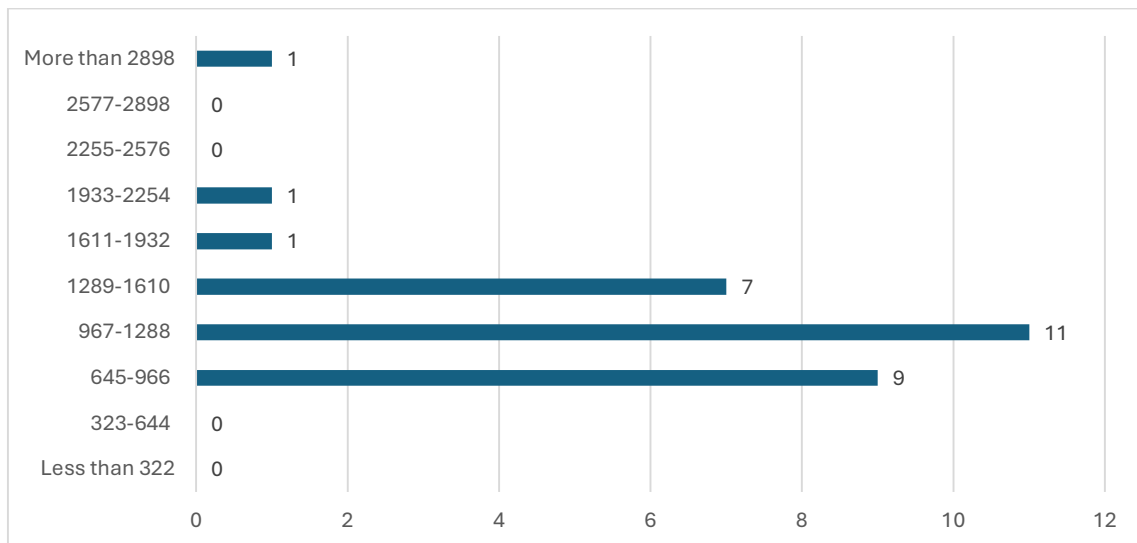
N=17

Source: Own calculations based on the survey

### 1.5. Wages of third-country workers

The average gross wage of third-country workers in the surveyed companies is EUR 1,222.9.<sup>5</sup> The average gross wage for third-country workers is lower than the overall company average of EUR 1,647.9 per month. Figure 5 illustrates the distribution of average gross wages (per month, in EUR) paid to third-country workers in the surveyed companies.

**Figure 5: Distribution of average gross wages paid to third-country workers (per month, in EUR)**



N=30

Source: Own calculations based on the survey

<sup>5</sup> Std. deviation: 491.02, min: 840, max: 3,215



Despite the numerical difference in average wages, the majority of companies consider the wages of third-country workers to be comparable to those of their other employees (Table 9).

**Table 9: Qualitatively comparing average gross wages of third-country workers to other workers in the same company**

	Frequency	Percent
Lower	7	20 %
Comparable	26	74 %
Higher	2	6 %

N=35

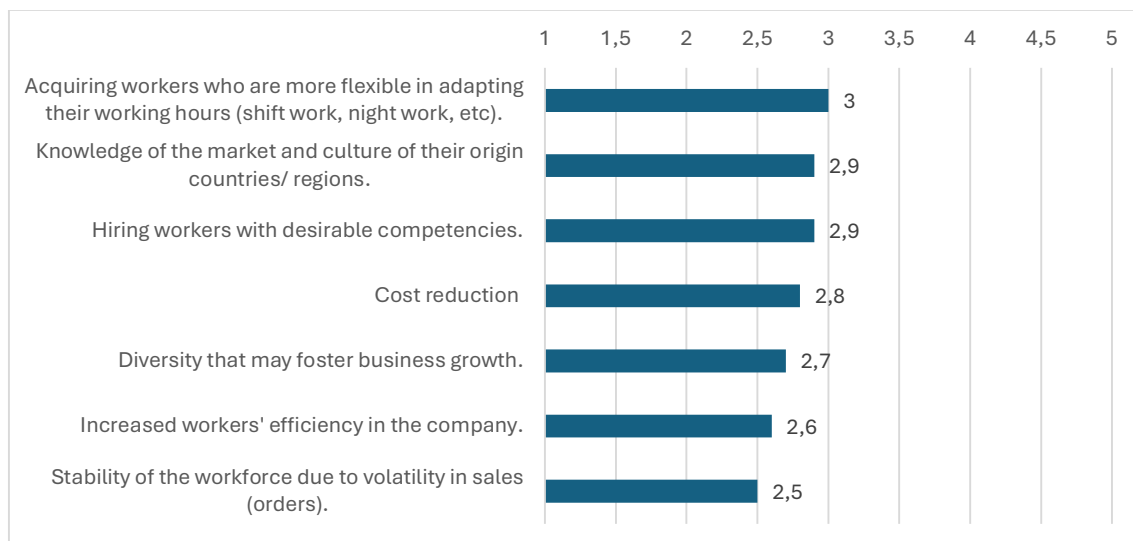
Source: Own calculations based on the survey

All the companies surveyed claimed that they did not receive any subsidies for employing third-country workers that other workers were not entitled to.

### 1.6. Advantages and barriers in employing third-country workers

The main advantages that companies see in employing third-country nationals are acquiring workers who are more flexible in adapting their work hours, knowledge of the market and culture of their origin countries, hiring workers with desirable competencies and cost reduction. They do not see the stability of the workforce due to volatility in sales as a benefit of employing third-country workers (Figure 6).

**Figure 6: Advantages of employing third-country workers (1 = fully disagree, 5 = fully agree)**

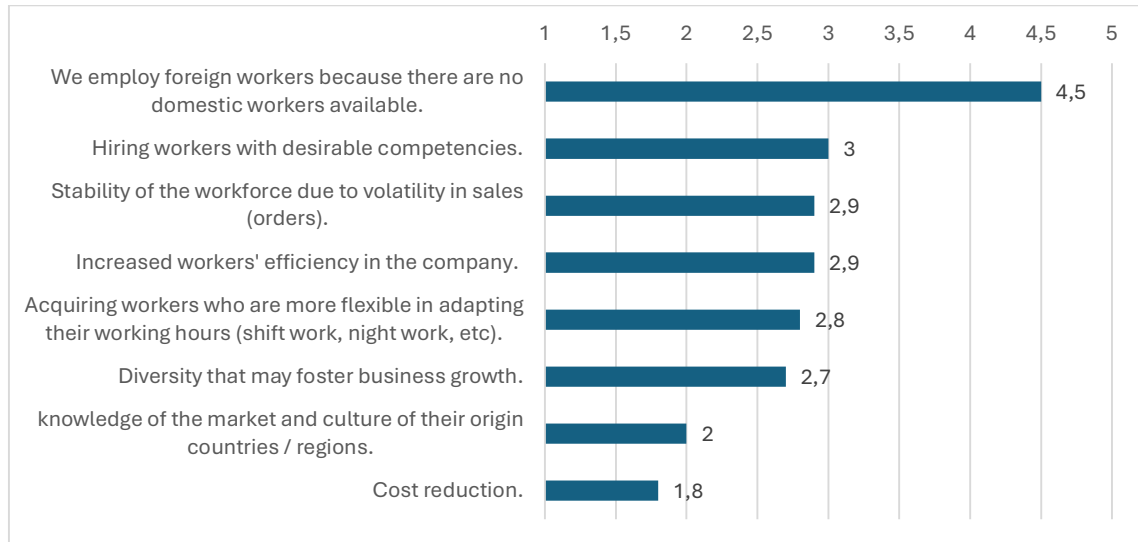


N=25

Source: Own calculations based on the survey

It is clear that one of the main reasons why companies decide to employ foreign workers is because of a lack of domestic workers and to hire workers with desirable competencies (Figure 7).

**Figure 7: Reasons for employing third-country workers (1 = fully disagree, 5 = fully agree)**



N=38

Source: Own calculations based on the survey

Respondents consider a lack of knowledge of the local language and a lack of systemic support measures to be the biggest potential problems associated with employing third-country workers (Figure 8).

**Figure 8: Potential problems related to employing third-country workers (1 = fully disagree, 5 = fully agree)**

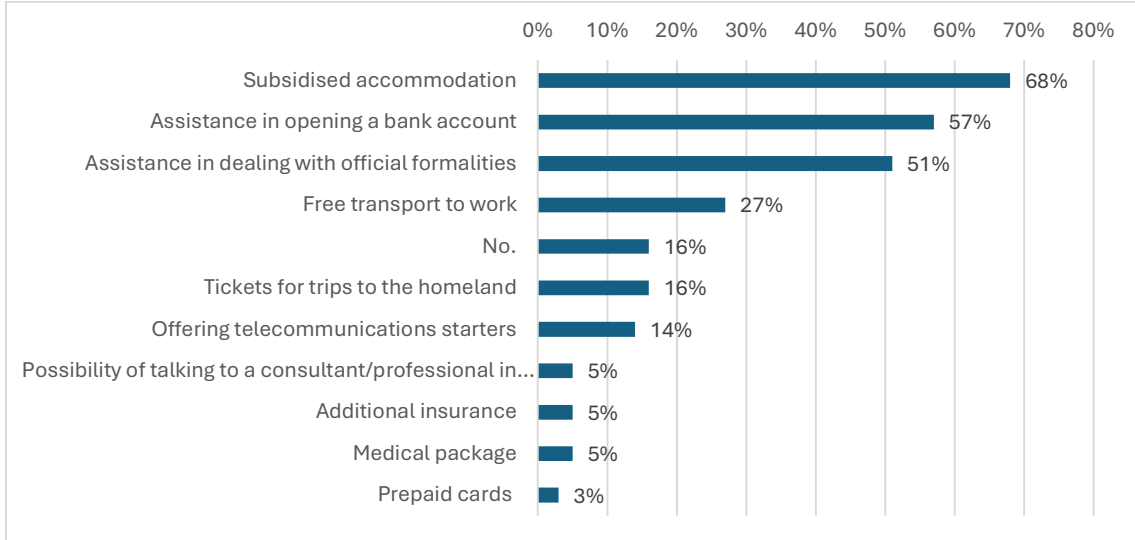


N=64

Source: Own calculations based on the survey

Regarding the amenities, offered to third-country workers, 68 % of the respondents offer third-country workers subsidized accommodation, 57 % offer third-country workers assistance in opening a bank account, and 51 % offer third-country workers assistance in dealing with official formalities (Figure 9).

**Figure 9: Amenities offered to third-country workers**

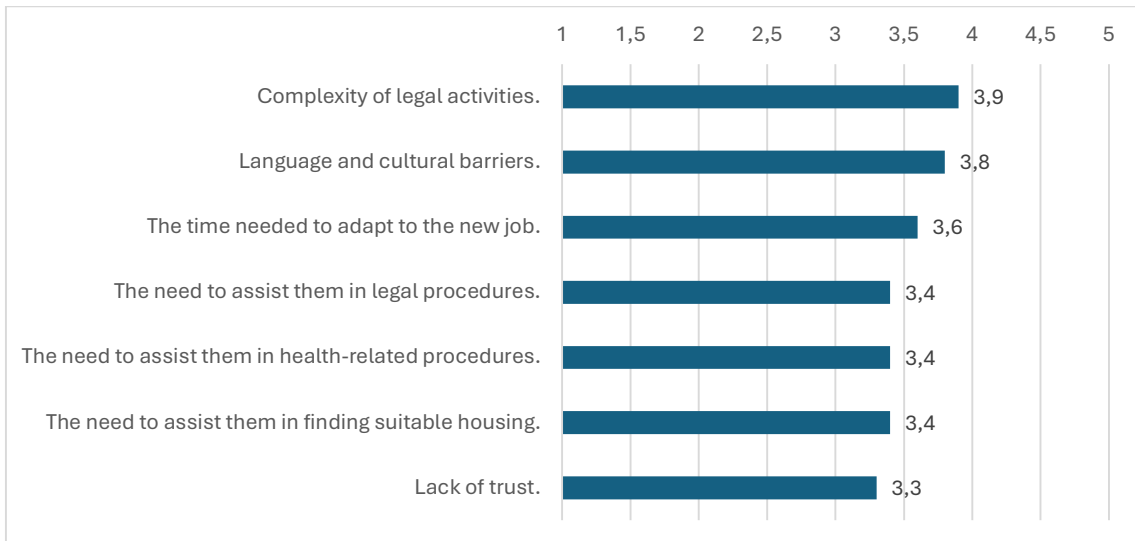


N=37

Source: Own calculations based on the survey

The survey results indicate that legal complexities, language and cultural barriers, and the time needed to adapt to the new job are the most significant barriers to employing third-country workers (Figure 10). The need to assist them in legal procedures, as well as the need to navigate health-related procedures and find them suitable housing are also significant challenges. Lack of trust is perceived as a less significant barrier.

**Figure 10: Barriers in employing third-country workers (1 = fully disagree, 5 = fully agree)**

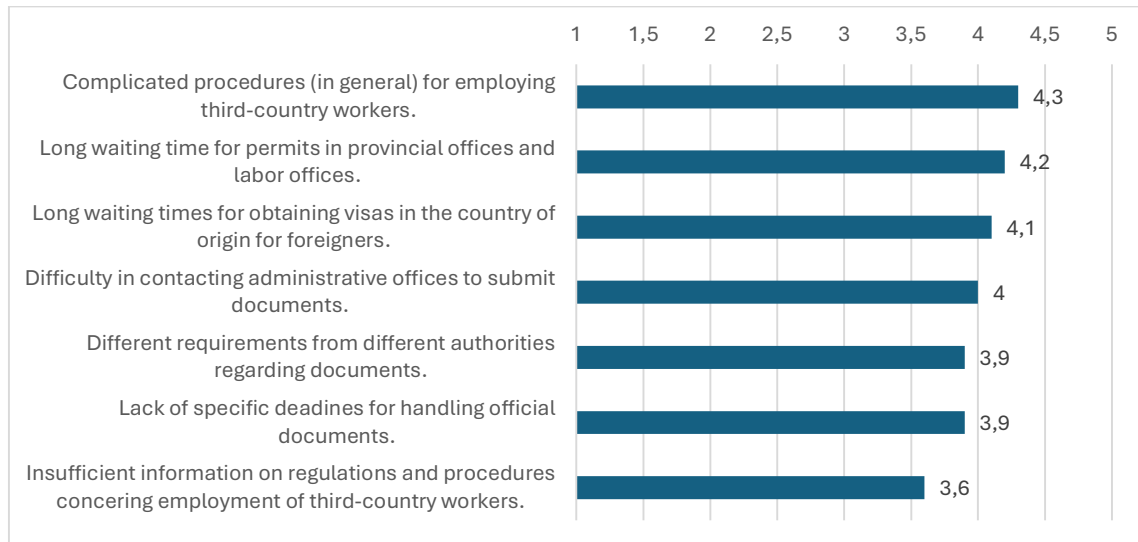


N=63

Source: Own calculations based on the survey

There is a high agreement about the wide range of formal barriers related to legal activities (Figure 11). The most pressing issues are complicated procedures in general for employing third-country workers, long waiting times for permits, long waiting times for obtaining visas in the home country for workers from third countries and difficulty in contacting administrative offices to submit documents.

**Figure 11: Formal barriers that are related to legal activities (1 = fully disagree, 5 = fully agree)**

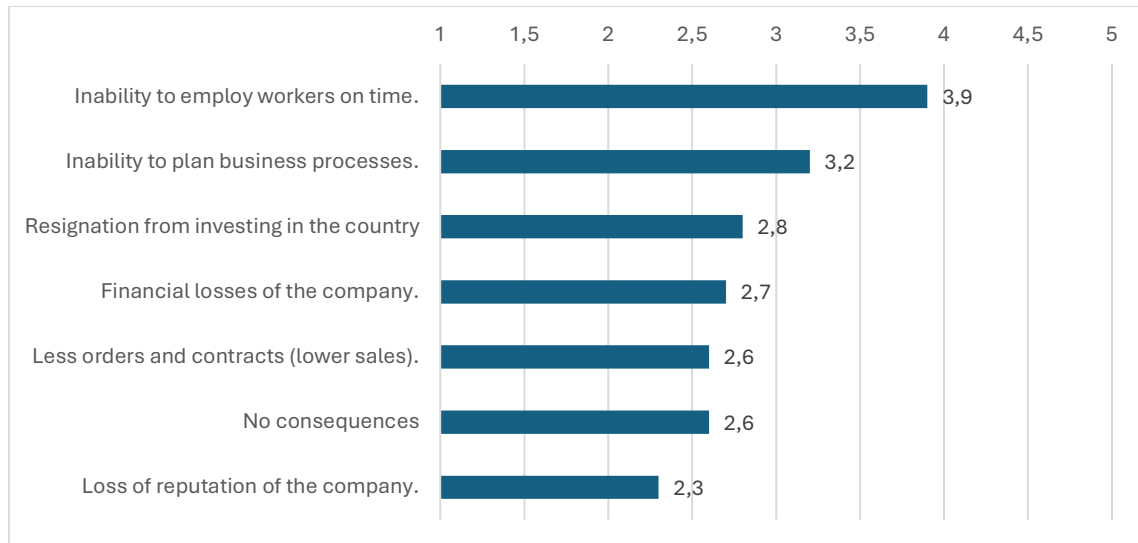


N=46

Source: Own calculations based on the survey

The consequences of the obstacles companies face when hiring workers from third countries are that companies cannot hire workers in a timely manner, have difficulties planning business processes, resignation from investing in the country and sometimes financial losses to the company and receiving fewer orders and contracts (Figure 12).

**Figure 12: Consequences of obstacles that companies face when employing third-country workers (1 = fully disagree, 5 = fully agree)**

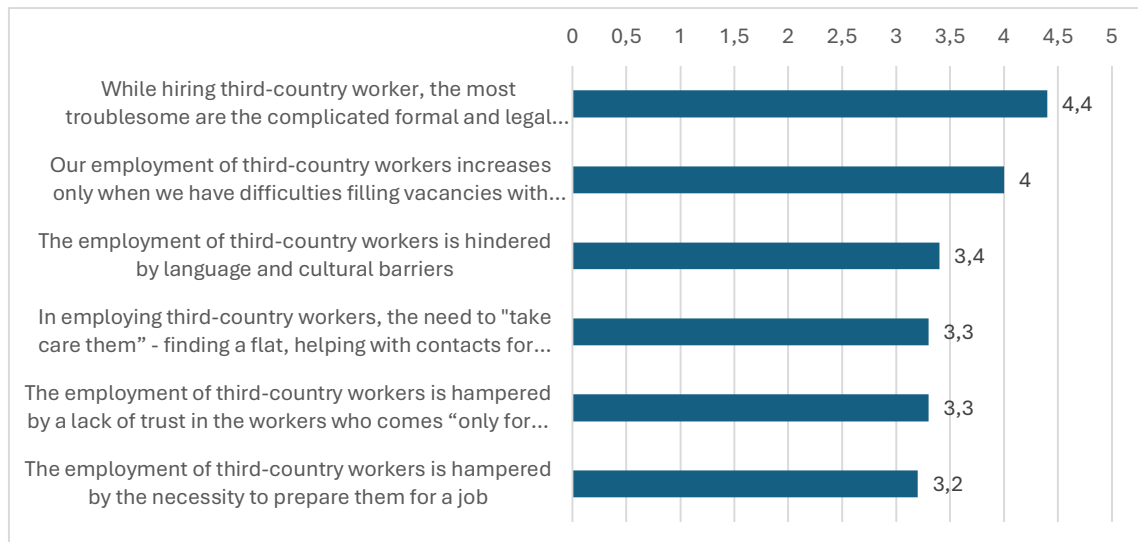


N=63

Source: Own calculations based on the survey

The most problematic aspect of employing third-country workers is the complicated formal and legal conditions (Figure 13).

**Figure 13: Evaluation of statements regarding the employment of third-country workers (1 = fully disagree, 5 = fully agree)**

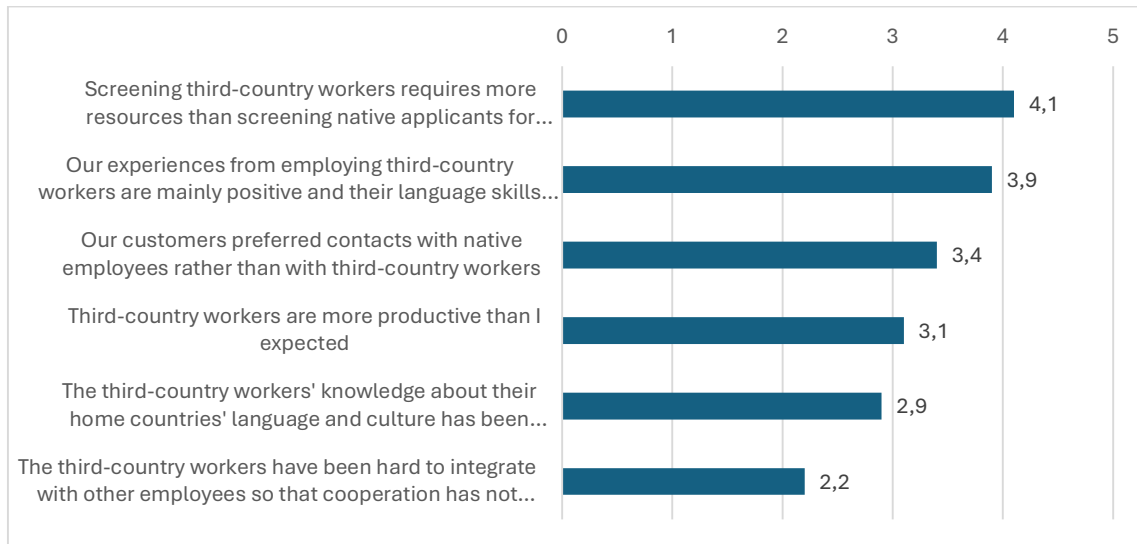


N=37

Source: Own calculations based on the survey

Even though the results of the surveyed companies show that screening third-country workers requires more resources, the experience of employing third-country workers, in general, is mainly positive and their language skills have been sufficient for them to do a good job (Figure 14). Companies generally disagree that third-country workers were difficult to integrate with other employees.

**Figure 14: Experiences with employing third-country employees (1 = fully disagree, 5 = fully agree)**



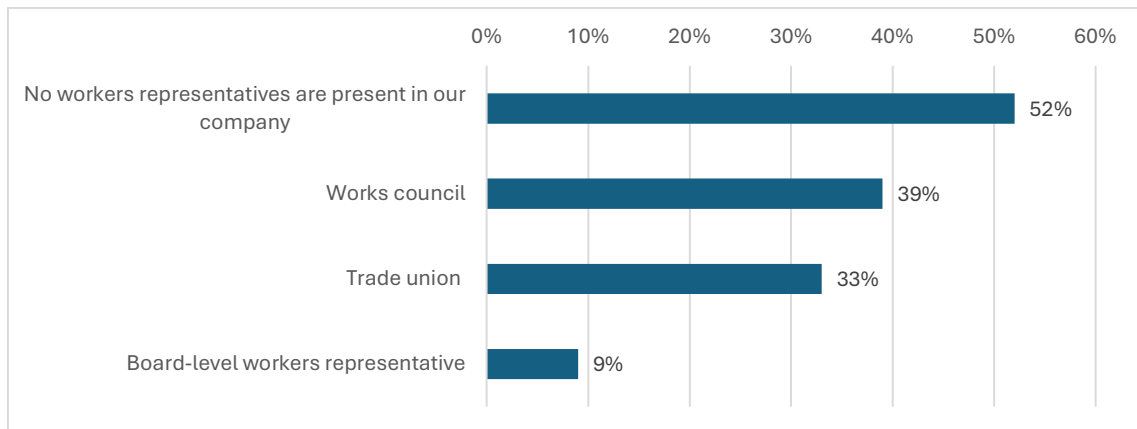
N=37

Source: Own calculations based on the survey

### 1.7. Workers' representation in companies

The companies surveyed first had to choose the form of workers' representation in their company (they could choose one or more). Results show that more than half of the surveyed companies don't have any form of workers' representation. In others, the works council and trade union are two of the most common workers' representation in the companies (Figure 15).

**Figure 15: Workers representation in companies**



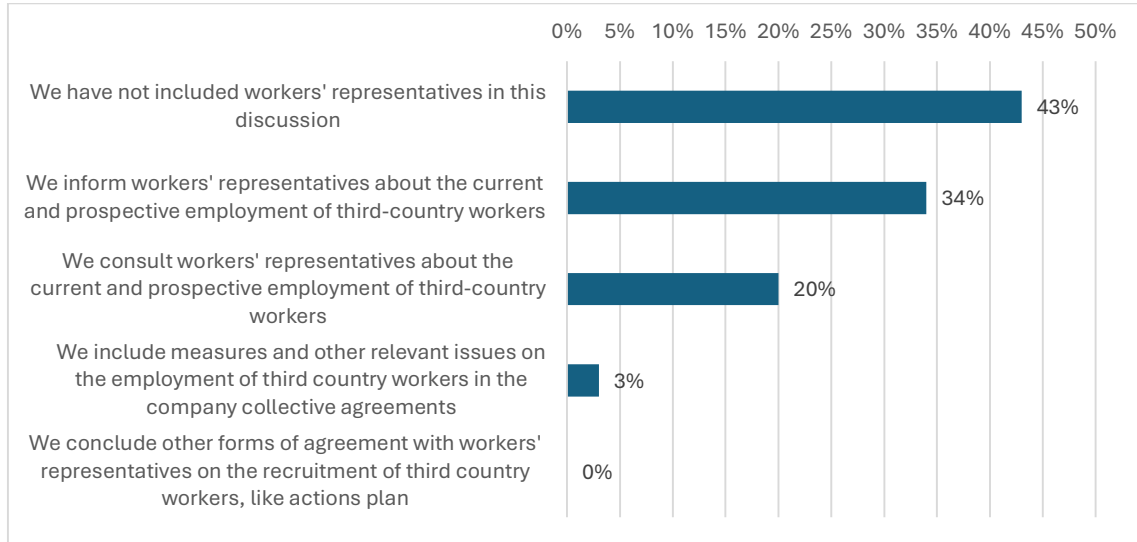
N=64

Source: Own calculations based on the survey

Almost half of the respondents (43 %) who have some form of workers' representation in their company did not involve workers' representatives in the discussion of the challenges posed by third-country workers (Figure 16). Interestingly, the situation is the opposite when it comes

to their future plans, as almost half of the respondents (43 %) intend to include workers' representatives in future discussions about the employment of third-country workers (Figure 17).

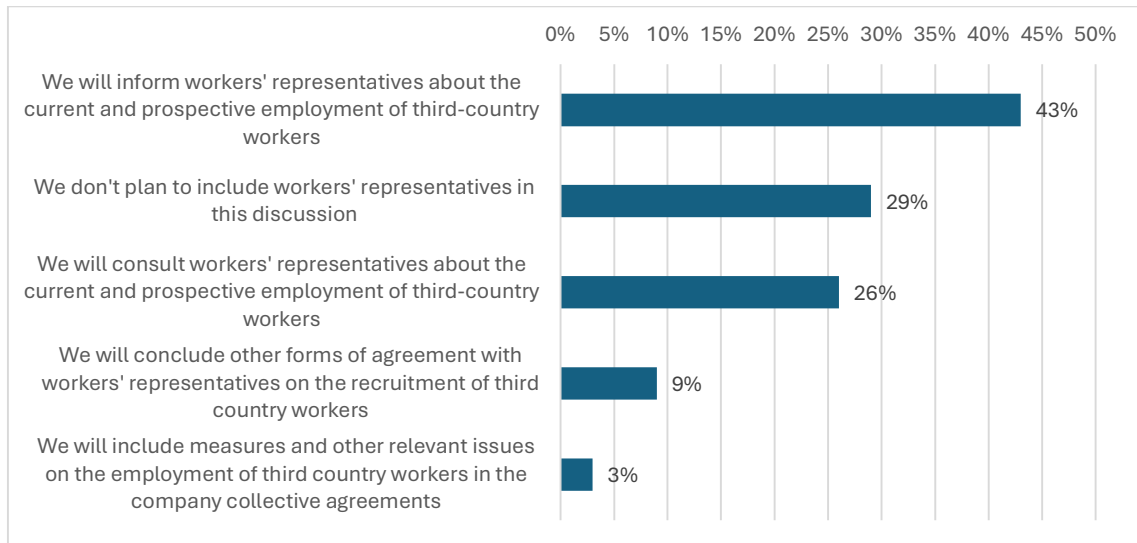
**Figure 16: Dealing with the challenges related to third-country workers**



N=35

Source: Own calculations based on the survey

**Figure 17: Plans to deal with the challenges related to third-country workers**



N=35

Source: Own calculations based on the survey

Moreover, almost half (45 %) of the respondents are not aware of the social partners' discussions on employment and challenges related to third-country workers at the sectoral and national level. Slightly more than a quarter, 27 %, of the respondents are aware of the discussions but do not know what they are about.

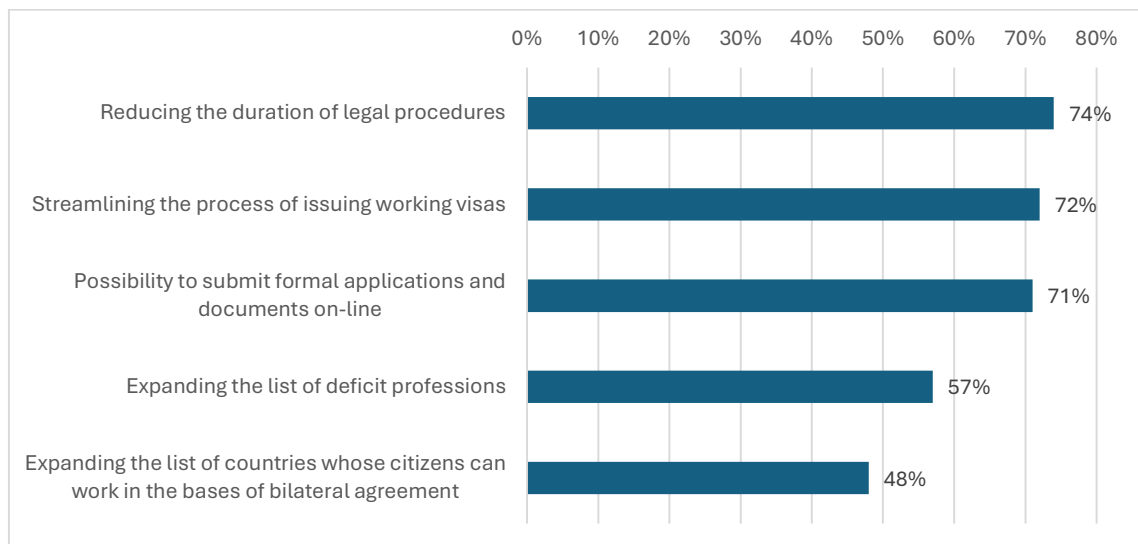
### 1.8. Gaps in supporting the employment of third-country nationals

The survey results indicate that companies have made efforts to implement various training and qualification measures to support the labour market integration of third-country workers. However, the areas with the most notable gaps include combating over-qualification and the use of digital tools. In terms of soft skills, companies perceive considerable gaps in self-development, computer literacy and communication skills. For information and counselling, the most notable gaps are in the enhancement of labour market knowledge, counselling/mentoring/coaching, and IT programmes/applications.

While companies have made significant efforts in preventing discrimination and raising awareness about diversity, they perceive gaps in providing civic/social-cultural orientation courses.

Respondents believe that the priority for facilitating the employment of third-country nationals should be to reduce the length of legal procedures, streamline the process for issuing work visas and allow formal applications and documents to be submitted online (Figure 18).

**Figure 18: Proposed changes in regulations to facilitate third-country workers employment**



N=58

Source: Own calculations based on the survey



## 2. Recruit4Tomorrow - izvješće o istraživanju o Hrvatskoj

Izvješće o istraživanju predstavlja uvide temeljene na opisnim statistikama s uzorka hrvatskih poduzeća. Anketa provedena između 22. travnja i 30. lipnja 2024. dobila je potpune ili djelomične odgovore od 90 tvrtki u vezi sa zapošljavanjem državljana trećih zemalja. Izvješće započinje kratkim sažetkom karakteristika uzorka, trenutnog stanja zapošljavanja stranih radnika i radnika iz trećih zemalja, njihovog podrijetla i plaća. Drugi dio istražuje prednosti i prepreke zapošljavanja radnika iz trećih zemalja, njihovu zastupljenost i nedostatke u podršci za njihovo zapošljavanje.

### 2.1. Karakteristike uzorka

Obilježja društava uključenih u uzorak prikazana su u tablici 1.

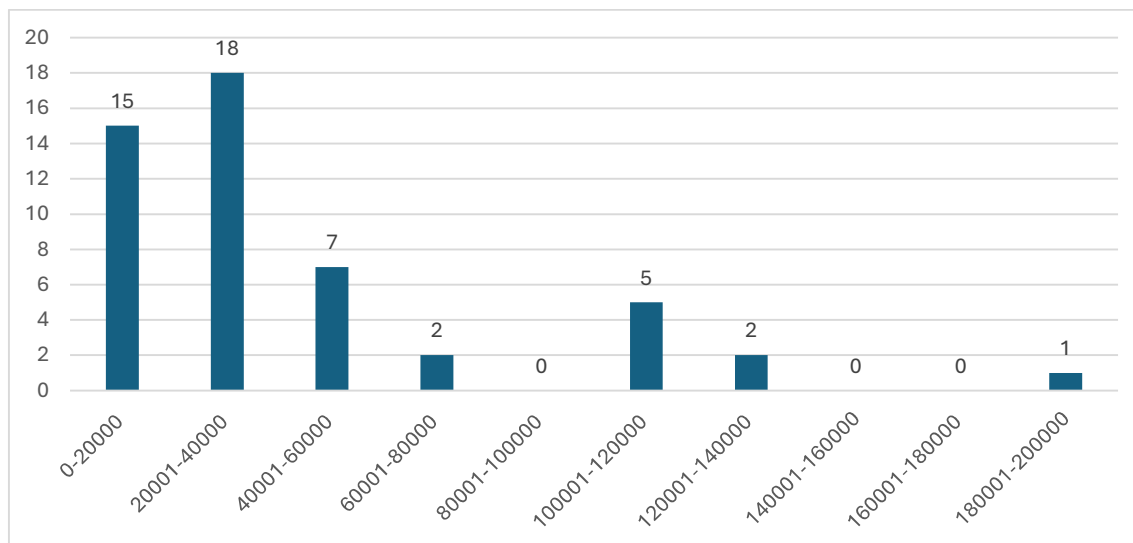
Tablica 1: Veličina, klasifikacija i industrija tvrtke

		Učestalost	Postotak
<b>Veličina (broj radnika) (N = 90)</b>	Manje od 10	7	8 %
	11-50	21	23 %
	51-250	16	18 %
	251-500	16	18 %
	Više od 500	30	33 %
<b>Klasifikacija tvrtke (N = 87)</b>	Obiteljsko poduzeće	15	17 %
	Domaća privatna tvrtka	42	48 %
	Domaće javno poduzeće	6	7 %
	Podružnica multinacionalnih poduzeća	15	17 %
	Drugi	9	10 %
<b>Industrija (N = 90)</b>	Građenje	6	7 %
	Ugostiteljstvo i turizam	21	23 %
	Zdravstvene	3	3 %
	Proizvodnja	17	19 %
	Sektor nafte i plina	9	10 %
	Automobilski sektor	2	2 %
	ICT (IT) sektor	8	9 %
	Trgovina	6	7 %
Ostale usluge	18	20 %	

Izvor: Vlastiti izračuni na temelju ankete

Prosječna dodana vrijednost po radniku među ispitanim poduzećima 2023. iznosila je 43.429,2<sup>6</sup> EUR godišnje. Raspodjela dodane vrijednosti po radniku među ispitanim poduzećima pokazuje širok spektar s koncentracijom u srednjim rasponima. Većina ispitanika spada u raspon od 20 001 EUR do 40 000 EUR (Slika 1.).

**Slika 1: Dodana vrijednost po radniku (godišnje, u EUR) u 2023.**



N=50

Izvor: Vlastiti izračuni na temelju ankete

Osim toga, prosječna bruto plaća koju prijavljuju ispitane tvrtke iznosi 1.674,9 eura<sup>78</sup> mjesečno. Raspodjela prosječnih bruto plaća među anketiranim poduzećima pokazuje da više od tri četvrtine (76,2%) tvrtki u uzorku prijavljuje prosječnu mjesečnu bruto plaću nižu od 2.000 eura mjesečno.

Anketa je obuhvatila širok raspon ispitanika s različitim pozicija u svojim organizacijama (tablica 2.). Karakteristike ispitanika pokazuju značajnu zastupljenost odjela za ljudske resurse i višeg menadžmenta, u skladu s fokusom ankete. Gotovo dvije trećine ispitanika bile su žene.

**Tablica 2: Položaj tuženika u tvrtki**

	Učestalost	Postotak
Predsjednik Uprave / Direktor / Član Uprave	31	36 %
Voditelj ljudskih resursa	16	19 %
Stručnjak za ljudske resurse	22	26 %
Voditelj pravnog odjela	2	2 %
Pravni stručnjak	5	6 %
Drugi	9	11 %

N=85

Izvor: Vlastiti izračuni na temelju ankete

<sup>6</sup> Std. odstupanje: 41,123.1, min: 10.000, max: 200.000

<sup>7</sup> Std. odstupanje: 1,178.47, min: 248.1, max: 9.126

<sup>8</sup> Prosječna bruto plaća u Hrvatskoj u 2023. godini iznosila je 1.584,00 eura.

Osim toga, gotovo svi ispitanici imaju najmanje 5 godina radnog iskustva, a većina ima više od 15 godina u svojim područjima (tablica 3.).

**Tablica 3: Trajanje radnog iskustva ispitanika**

	<b>Učestalost</b>	<b>Postotak</b>
Manje od 5 godina	5	6 %
5 - 15 godina	25	29 %
16 - 25 godina	27	31 %
26 - 35 godina	21	25 %
Više od 35 godina	8	9 %

N=86

Izvor: Vlastiti izračuni na temelju ankete

## 2.2. Zapošljavanje stranih radnika: trenutna situacija

Većina, odnosno 66 % ispitanih poduzeća izjavila je da trenutačno zapošljavaju strane radnike (tablica 4.). Gotovo svi ispitanici koji zapošljavaju strane radnike izjavili su da zapošljavaju i strane radnike izvan EU-a.

**Tablica 4: Zapošljavanje stranih radnika**

	<b>Učestalost</b>	<b>Postotak</b>
Da	59	66 %
Ne	31	34 %

N=90

Izvor: Vlastiti izračuni na temelju ankete

Za one tvrtke koje trenutačno ne zapošljavaju strane radnike (tablica 5.) ispitanici su i njihovi budući planovi za zapošljavanje stranih radnika. Od tih ispitanika, 44 % (13 ispitanika) planira zaposliti strane radnike u budućnosti. Konkretno, 5 od tih 13 ispitanika navelo je da planiraju zaposliti radnike iz trećih zemalja. S druge strane, 50 % (15 ispitanika) ne planira zapošljavati strane radnike u budućnosti.

**Tablica 5: Strategija budućeg zapošljavanja stranih radnika**

	<b>Učestalost</b>	<b>Postotak</b>
U budućnosti planiramo zapošljavati strane radnike iz zemalja EU	8	27 %
U budućnosti planiramo zapošljavati radnike iz trećih zemalja	5	17 %
U budućnosti ne planiramo zapošljavati strane radnike	15	50 %
Drugi	7	23 %

N=30

Izvor: Vlastiti izračuni na temelju ankete

### 2.3. Zapošljavanje radnika iz trećih zemalja (izvan EU-a)

Kad je riječ o broju radnika izvan EU-a koji su trenutačno zaposleni u poduzećima, 18 % ispitanika izjavilo je da se manje od 5 % njihove radne snage sastoji od radnika izvan EU-a, dok je 14 % navelo između 6 % i 10 %. Konkretno, 10 % poduzeća ima više od 20 % državljana trećih zemalja u svojoj radnoj snazi (tablica 6.). Ove tvrtke posluju u građevinarstvu, ugostiteljstvu i turizmu te drugim uslugama (logistika i transport te agencija za zapošljavanje).

**Tablica 6: Raspodjela radnika iz trećih zemalja u radnoj snazi**

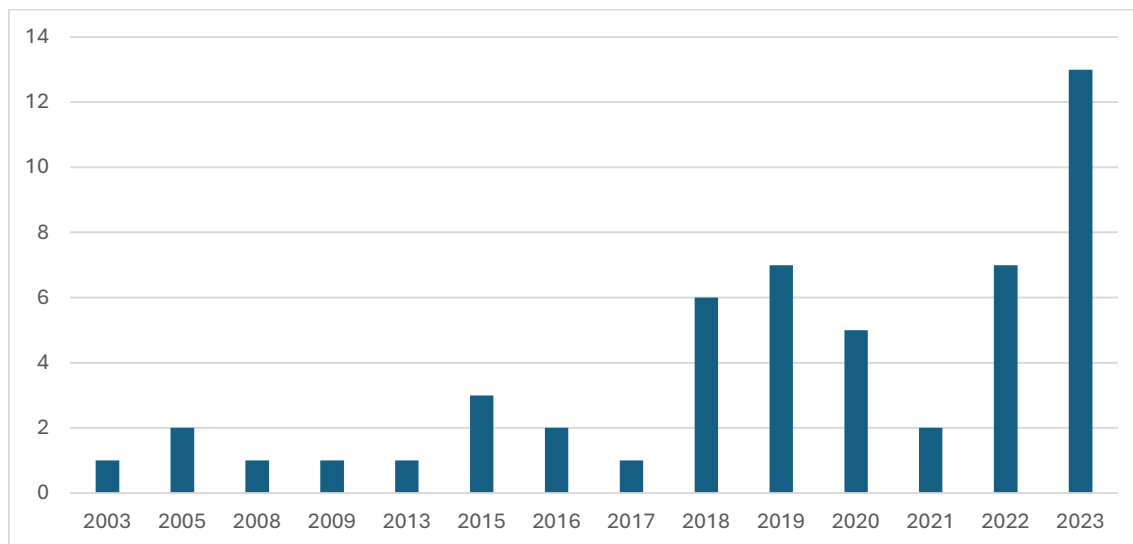
	Učestalost	Postotak
Manje od 5 % ukupne radne snage	16	31 %
6-10 %	13	25 %
11-15 %	5	10 %
16-20 %	7	13 %
Više od 20 %	9	17 %
Ne znam točno	2	4 %

N=52

Izvor: Vlastiti izračuni na temelju ankete

Na slici 2. prikazano je da, iako neka poduzeća zapošljavaju državljane trećih zemalja od 2003., ta je praksa od 2018. zabilježena znatnim i primjetnim porastom. Podaci pokazuju stalan porast broja poduzeća koja zapošljavaju državljane trećih zemalja tijekom godina, sa značajnim vrhuncima u 2019., 2022. i 2023.

**Slika 2: Broj poduzeća koja prijavljuju početak zapošljavanja državljana trećih zemalja po godini**



N=52

Izvor: Vlastiti izračuni na temelju ankete

Rezultati upućuju na to da, iako radnici iz trećih zemalja u anketiranim poduzećima dolaze iz različitih obrazovnih sredina, postoji značajna zastupljenost onih sa srednjom i visokom obrazovanjem. Među 29 ispitanih poduzeća koja zapošljavaju te radnike i odgovorila na pitanje o obrazovnoj strukturi, 62,7 % ima srednjoškolsko obrazovanje, a 14,6 % tercijarno

obrazovanje. Više od četvrtine ispitanika (28 %) smatra da je obrazovna struktura radnika iz trećih zemalja usporediva s općom radnom snagom u poduzeću. Međutim, 53 % ispitanika smatra da radnici iz trećih zemalja imaju nižu prosječnu razinu obrazovanja (tablica 7.). Također je vrijedno napomenuti da samo trećina radnika iz trećih zemalja čine žene. Dobna struktura radnika iz trećih zemalja u ispitanim poduzećima pokazuje da je većina mlađa od 30 godina (64,4 %).

**Tablica 7: Razina obrazovanja poduzeća u odnosu na radnike iz trećih zemalja**

	<b>Učestalost</b>	<b>Postotak</b>
Usporediv	11	28 %
Radnici iz trećih zemalja u prosjeku imaju niže obrazovanje.	21	53 %
Radnici iz trećih zemalja u prosjeku imaju visoko obrazovanje.	1	3 %
Teško je odgovoriti	6	15 %
Drugi	1	3 %

N=40

Izvor: Vlastiti izračuni na temelju ankete

Više od polovice radnika izvan EU-a zaposleno je na osnovnim poslovima (usluge čišćenja, poljoprivrede, ribarstva i šumarstva, pomoć pri pripremi hrane itd.), nakon čega slijede uslužni poslovi (tablica 8.).

**Tablica 8: Vrste radnih mjesta radnika iz trećih zemalja**

	<b>Učestalost</b>	<b>Postotak</b>
Uslužni poslovi (prodaja, osobna njega, zaštitne usluge, osobne usluge itd.)	12	29 %
Stručni i tehnički rad (zdravstvene usluge, pravne i druge stručne usluge, znanstvene i inženjerske stručne usluge itd.)	3	7 %
Proizvodni rad	7	17 %
Osnovni poslovi (usluge čišćenja, poljoprivrede, ribarstva i šumarstva, pomoć pri pripremi hrane itd.)	22	52 %
Menadžerski rad	3	7 %
Drugi	8	19 %

N=42

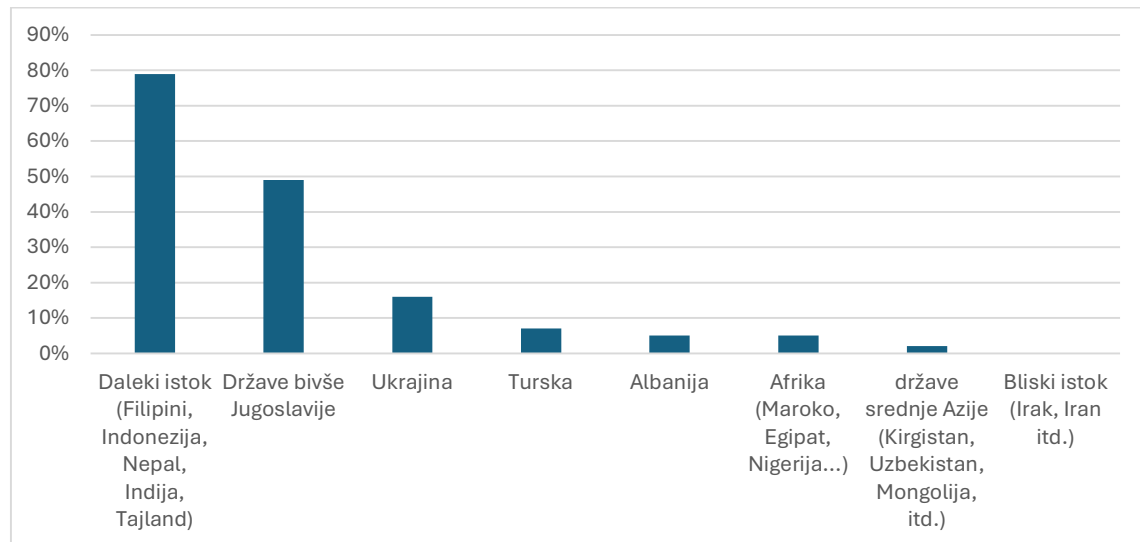
Izvor: Vlastiti izračuni na temelju ankete

## 2.4. Podrijetlo radnika iz trećih zemalja

Rezultati istraživanja pokazuju da radnici iz trećih zemalja pretežno dolaze s Dalekog istoka (Filipini, Indonezija, Nepal, Indija i Tajland). Osim toga, znatan broj radnika iz trećih zemalja

dolazi iz zemalja bivše Jugoslavije (Bosna i Hercegovina, Srbija, Crna Gora, Sjeverna Makedonija) te Kosova i Ukrajine (slika 3.).<sup>9</sup>

**Slika 3: Podrijetlo radnika iz trećih zemalja**



N=43

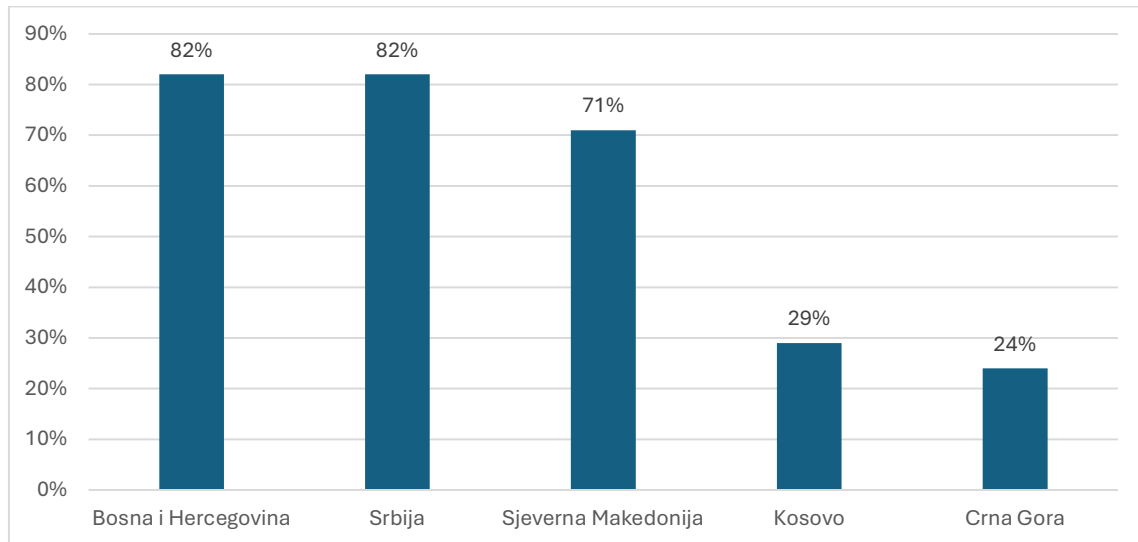
Izvor: Vlastiti izračuni na temelju ankete

Ispitanici su Nepal i Filipine također naveli kao zemlje podrijetla s najvećim udjelom radnika iz trećih zemalja u svojoj radnoj snazi. Ono što treba naglasiti je da ovo istraživanje pokazuje trend koji je relevantan i dominantan u posljednje 3 godine u Hrvatskoj, s novim stranim radnicima koji dolaze iz tih područja, a posebno iz jugoistočne Azije. Ipak, u ukupnom broju, većina stranih radnika u apsolutnom broju još uvijek dolazi iz zemalja bivše Jugoslavije, od kojih su mnogi aktivni u Hrvatskoj već nekoliko godina.

Na pitanje iz kojih zemalja bivše Jugoslavije radnici potječu, najčešći odgovori bili su Bosna i Hercegovina i Srbija (slika 4).

<sup>9</sup> Navedeni udio zemlje podrijetla odnosi se isključivo na zalihe radnika u našim poduzećima u uzorku. Međutim, službeni podaci o zemlji podrijetla za radnike iz trećih zemalja koji su dobili boravišnu i radnu dozvolu u prvih šest mjeseci 2024. upućuju na to da je 21 % njih bilo iz Bosne i Hercegovine, 18 % iz Srbije i Nepala, a 8,7 % iz Indije. ([Mjesečne statistike srpanj 2024.pdf \(gov.hr\)](#)).

**Slika 4: Podrijetlo radnika iz trećih zemalja iz zemalja bivše Jugoslavije izvan EU-a**



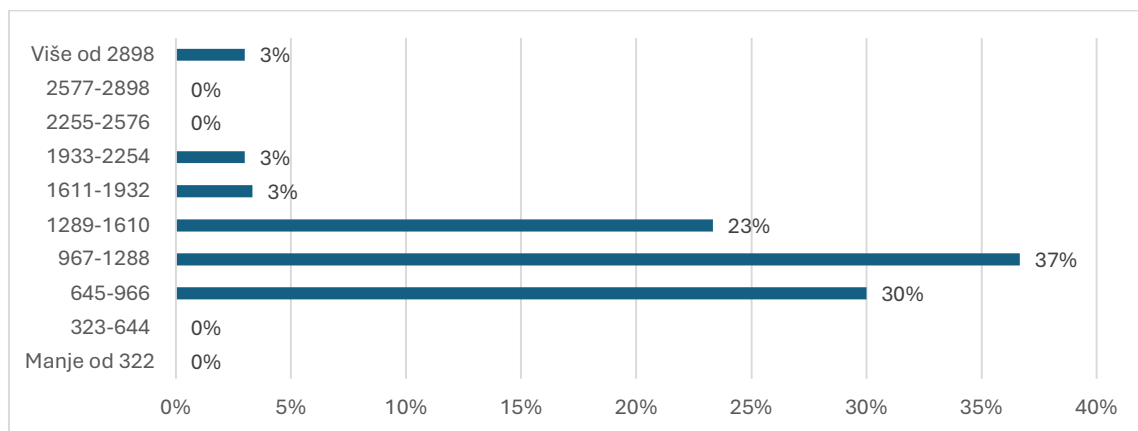
N= 17

Izvor: Vlastiti izračuni na temelju ankete

## 2.5. Plaće radnika iz trećih zemalja

Prosječna bruto plaća radnika iz trećih zemalja u anketiranim poduzećima iznosi 1.222,9 eura.<sup>10</sup> Prosječna bruto plaća radnika iz trećih zemalja niža je od ukupnog prosjeka poduzeća od 1.647,9 EUR mjesečno. Na slici 5. prikazana je raspodjela prosječnih bruto plaća (mjesečno, u EUR) isplaćenih radnicima iz trećih zemalja u ispitanim poduzećima.

**Slika 5: Raspodjela prosječnih bruto plaća isplaćenih radnicima iz trećih zemalja (mjesečno, u EUR)**



N=30

Izvor: Vlastiti izračuni na temelju ankete

Unatoč brojčanoj razlici u prosječnim plaćama, većina poduzeća smatra da su plaće radnika iz trećih zemalja usporedive s plaćama njihovih ostalih zaposlenika (tablica 9.).

<sup>10</sup> Std. odstupanje: 491,02, min: 840, max: 3,215

**Tablica 9: Kvalitativna usporedba prosječnih bruto plaća radnika iz trećih zemalja s drugim radnicima u istom poduzeću**

	Učestalost	Postotak
Sniziti	7	20 %
Usporediv	26	74 %
Viši	2	6 %

N=35

Izvor: Vlastiti izračuni na temelju ankete

Sva ispitana poduzeća tvrdila su da nisu primila nikakve subvencije za zapošljavanje radnika iz trećih zemalja na koje drugi radnici nisu imali pravo.

## 2.6. Prednosti i prepreke zapošljavanju radnika iz trećih zemalja

Glavne prednosti koje tvrtke vide u zapošljavanju državljana trećih zemalja su pronalaženje radnika koji su fleksibilniji u prilagodbi radnog vremena, poznavanje tržišta i kulture zemalja podrijetla, zapošljavanje radnika sa poželjnim kompetencijama i smanjenje troškova. Stabilnost radne snage zbog nestabilnosti prodaje ne vide kao korist od zapošljavanja radnika iz trećih zemalja (slika 6.).

**Slika 6: Prednosti zapošljavanja radnika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**



N=25

Izvor: Vlastiti izračuni na temelju ankete

Jasno je da je jedan od glavnih razloga zašto se tvrtke odlučuju na zapošljavanje stranih radnika nedostatak domaćih radnika i zapošljavanje radnika sa poželjnim kompetencijama (Slika 7).



**Slika 7: Razlozi za zapošljavanje radnika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**

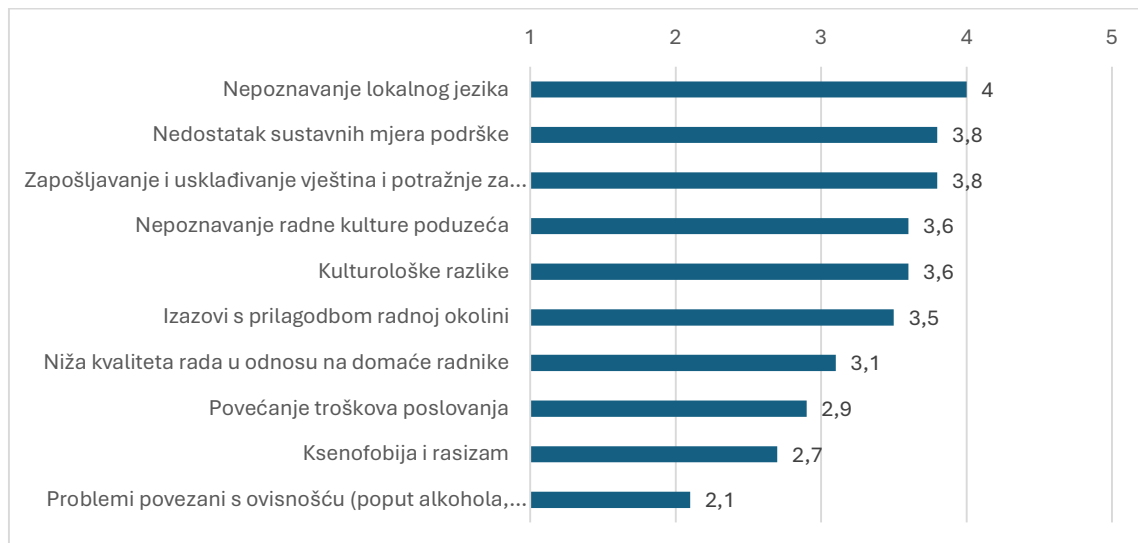


N=38

Izvor: Vlastiti izračuni na temelju ankete

Ispitanici smatraju da su nedostatak znanja lokalnog jezika i nedostatak sustavnih mjera potpore najveći potencijalni problemi povezani sa zapošljavanjem radnika iz trećih zemalja (slika 8.).

**Slika 8: Mogući problemi povezani sa zapošljavanjem radnika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**

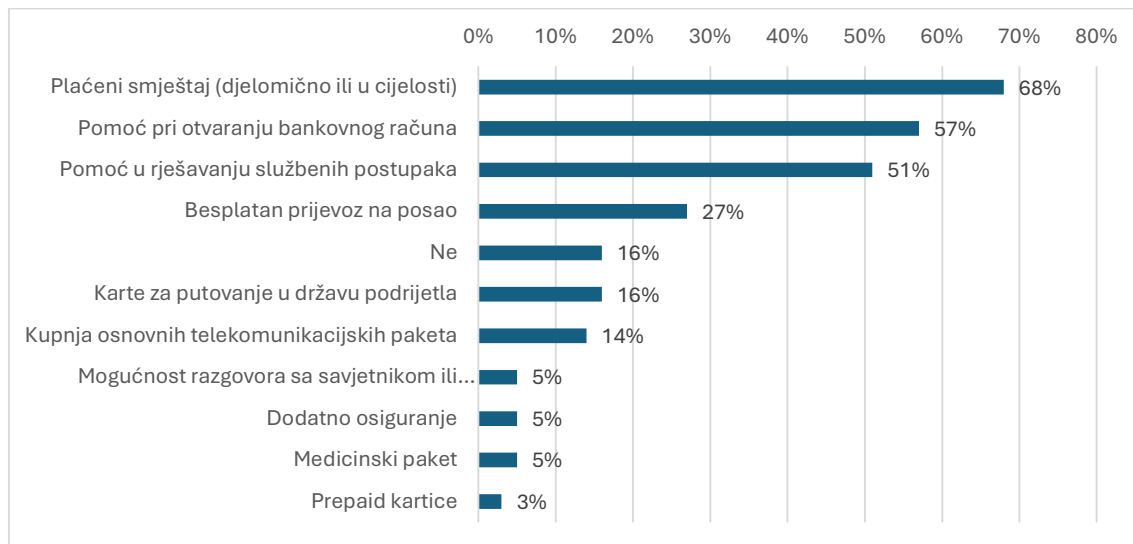


N=64

Izvor: Vlastiti izračuni na temelju ankete

Kad je riječ o sadržajima koji se nude radnicima iz trećih zemalja, 68 % ispitanika nudi radnicima iz trećih zemalja subvencionirani smještaj, 57 % radnicima iz trećih zemalja nudi pomoć pri otvaranju bankovnog računa, a 51 % nudi radnicima iz trećih zemalja pomoć u obavljanju službenih formalnosti (slika 9.).

**Slika 9: Sadržaji koji se nude radnicima iz trećih zemalja**



N=37

Izvor: Vlastiti izračuni na temelju ankete

Rezultati ankete pokazuju da su pravne složenosti, jezične i kulturne barijere te vrijeme potrebno za prilagodbu novom radnom mjestu najznačajnije prepreke zapošljavanju radnika iz trećih zemalja (slika 10.). Potreba da im se pomogne u pravnim postupcima, kao i potreba za snalaženjem u zdravstvenim postupcima i pronalaženjem odgovarajućeg smještaja također su značajni izazovi. Nedostatak povjerenja doživljava se kao manje značajna prepreka.

**Slika 10: Prepreke zapošljavanju radnika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**



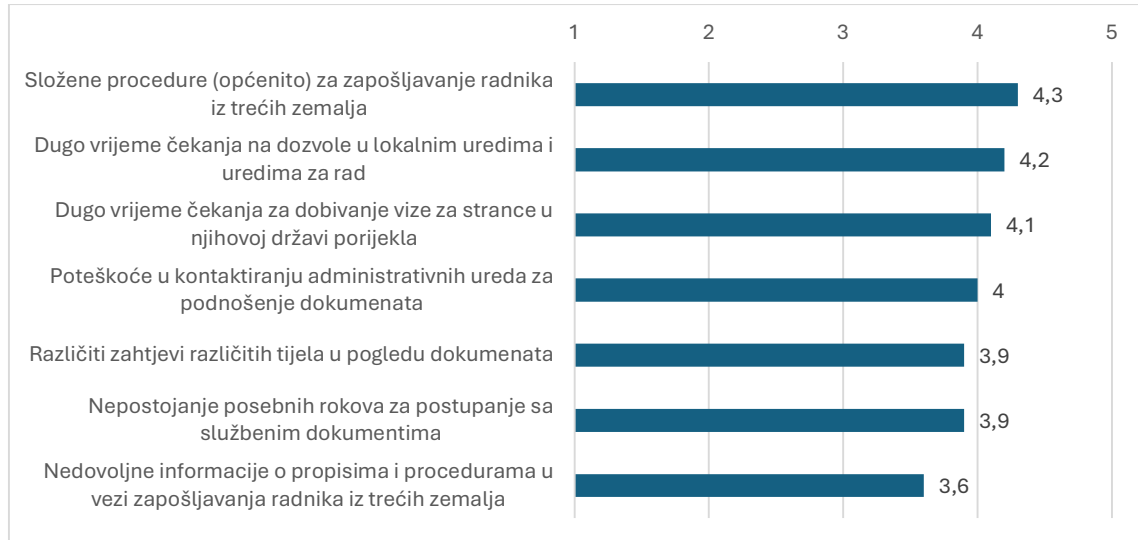
N=63

Izvor: Vlastiti izračuni na temelju ankete

Postoji velika suglasnost oko širokog raspona formalnih prepreka povezanih s pravnim aktivnostima (slika 11.). Najhitnija pitanja općenito su složeni postupci za zapošljavanje radnika iz trećih zemalja, dugo vrijeme čekanja na dozvole, dugo vrijeme čekanja na dobivanje

viza u matičnoj zemlji za radnike iz trećih zemalja i poteškoće u kontaktiranju upravnih ureda radi podnošenja dokumenata.

**Slika 11: Formalne prepreke koje su povezane s pravnim aktivnostima (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**



N=46

Izvor: Vlastiti izračuni na temelju ankete

Posljedice prepreka s kojima se poduzeća suočavaju pri zapošljavanju radnika iz trećih zemalja jesu da poduzeća ne mogu pravodobno zaposliti radnike, imaju poteškoća u planiranju poslovnih procesa, odustaju od ulaganja u zemlju, a ponekad i financijske gubitke za poduzeće te primaju manje narudžbi i ugovora (slika 12.).

**Slika 12: Posljedice prepreka s kojima se poduzeća suočavaju pri zapošljavanju radnika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**

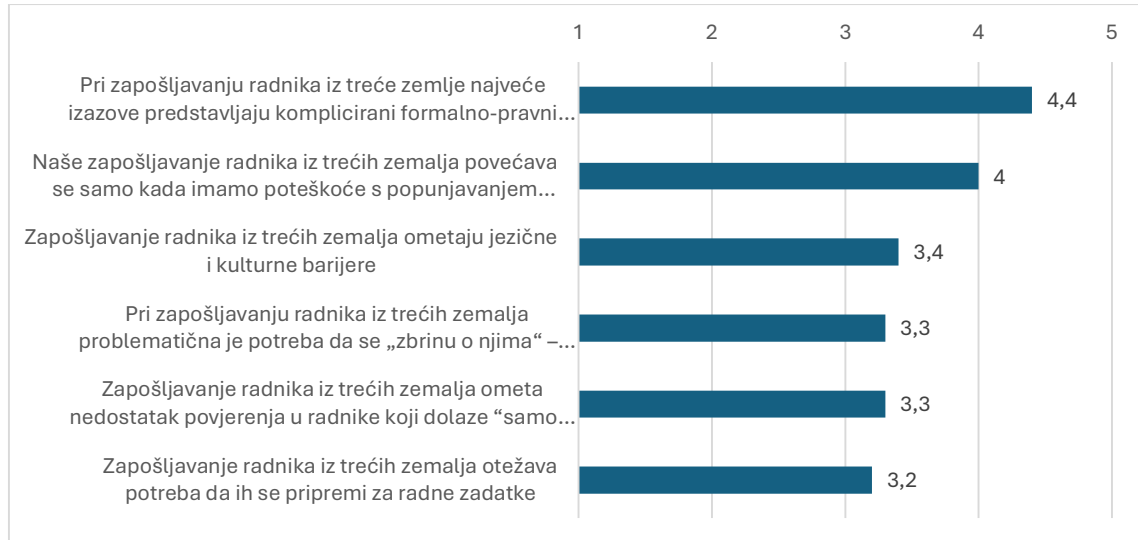


N=63

Izvor: Vlastiti izračuni na temelju ankete

Najproblematičniji aspekt zapošljavanja radnika iz trećih zemalja složeni su formalni i pravni uvjeti (slika 13.).

**Slika 13: Evaluacija izjava o zapošljavanju radnika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**



N=37

Izvor: Vlastiti izračuni na temelju ankete

Iako rezultati ispitanih poduzeća pokazuju da je za provjeru radnika iz trećih zemalja potrebno više resursa, iskustvo zapošljavanja radnika iz trećih zemalja općenito je uglavnom pozitivno, a njihove jezične vještine dovoljne su za dobar posao (slika 14.). Poduzeća se općenito ne slažu da je radnike iz trećih zemalja bilo teško integrirati s drugim zaposlenicima.

**Slika 14: Iskustva sa zapošljavanjem zaposlenika iz trećih zemalja (1 = potpuno se ne slažem, 5 = u potpunosti se slažem)**



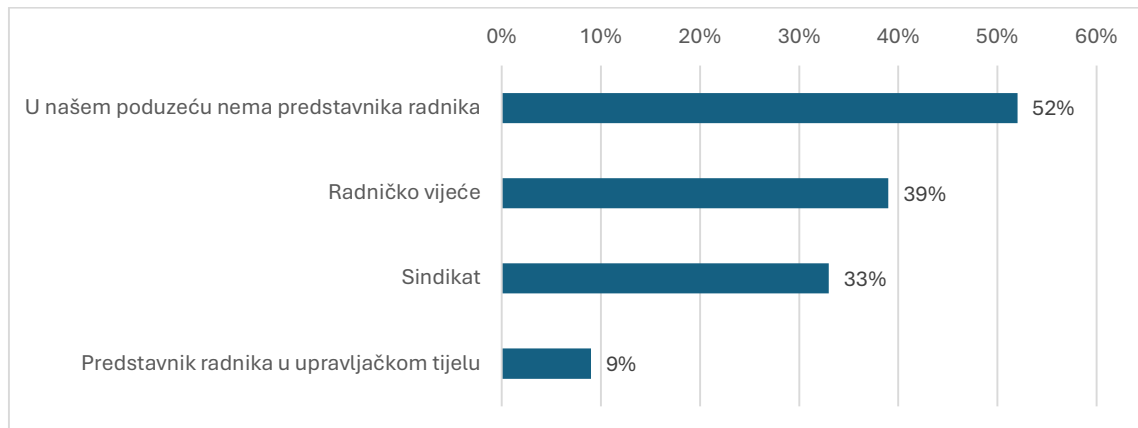
N=37

Izvor: Vlastiti izračuni na temelju ankete

## 2.7. Zastupljenost radnika u trgovačkim društvima

Ispitane tvrtke prvo su morale odabrati oblik zastupljenosti radnika u svojoj tvrtki (mogle su odabrati jednu ili više njih). Rezultati pokazuju da više od polovice ispitanih tvrtki nema nikakav oblik zastupanja radnika. U drugima, radničko vijeće i sindikat dva su najčešća radnička zastupljenost u poduzećima (slika 15).

**Slika 15: Zastupljenost radnika u trgovačkim društvima**

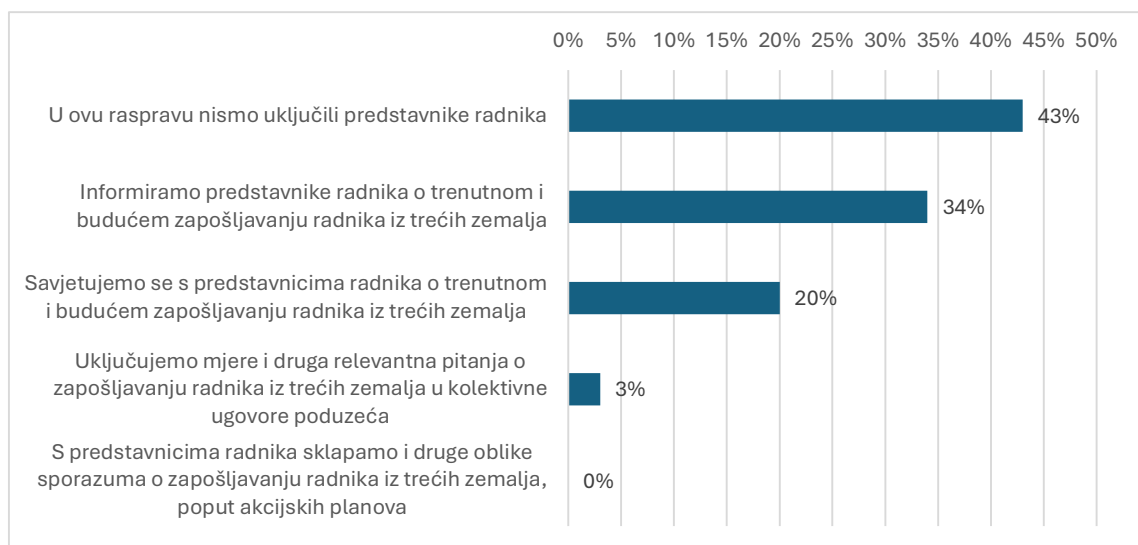


N=64

Izvor: Vlastiti izračuni na temelju ankete

Gotovo polovica ispitanika (43 %) koji imaju neki oblik zastupljenosti radnika u svojem poduzeću nije uključila predstavnike radnika u raspravu o izazovima s kojima se suočavaju radnici iz trećih zemalja (slika 16.). Zanimljivo je da je situacija suprotna kad je riječ o njihovim budućim planovima jer gotovo polovica ispitanika (43 %) namjerava uključiti predstavnike radnika u buduće rasprave o zapošljavanju radnika iz trećih zemalja (slika 17.).

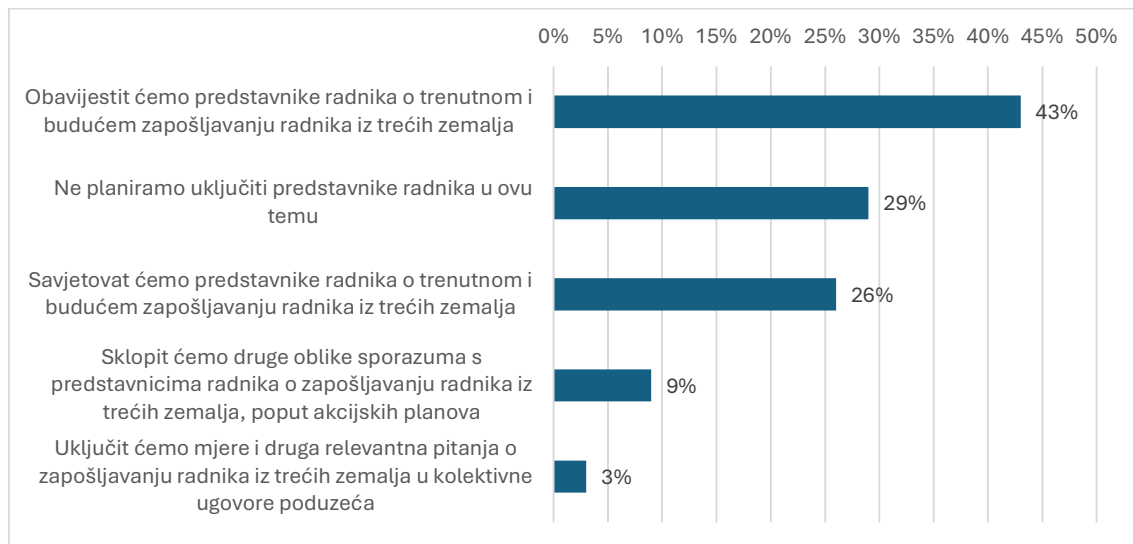
**Slika 16: Suočavanje s izazovima povezanim s radnicima iz trećih zemalja**



N=35

Izvor: Vlastiti izračuni na temelju ankete

**Slika 17: Planovi za suočavanje s izazovima povezanim s radnicima iz trećih zemalja**



N=35

Izvor: Vlastiti izračuni na temelju ankete

Nadalje, gotovo polovica (45 %) ispitanika nije upoznata s raspravama socijalnih partnera o zapošljavanju i izazovima povezanim s radnicima iz trećih zemalja na sektorskoj i nacionalnoj razini. Nešto više od četvrtine, 27 % ispitanika upoznato je s raspravama, ali ne zna o čemu se radi.

## 2.8. Nedostaci u podupiranju zapošljavanja državljana trećih zemalja

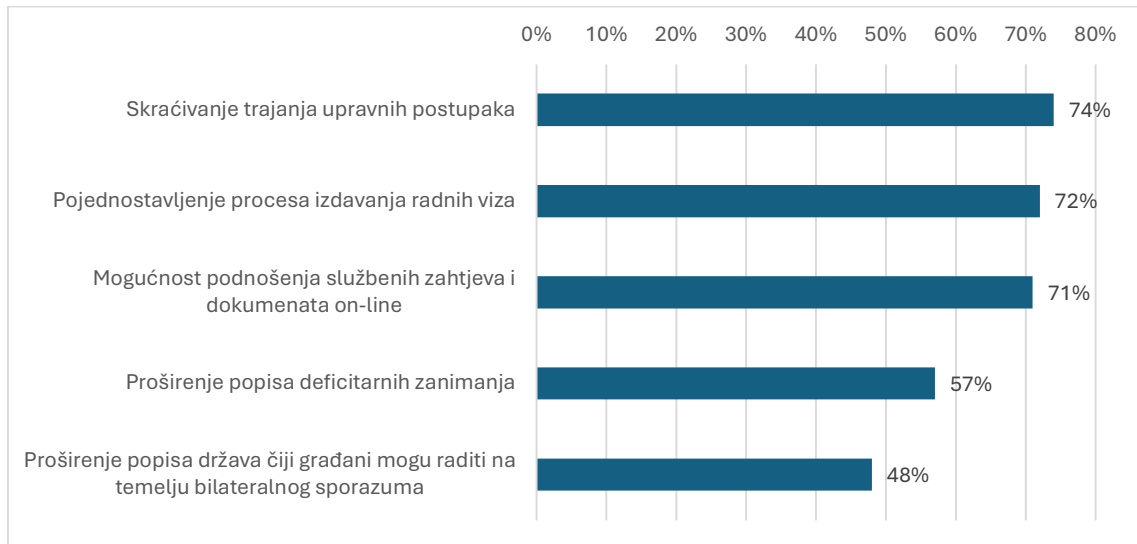
Rezultati ankete pokazuju da su poduzeća uložila napore u provedbu različitih mjera osposobljavanja i kvalifikacija kako bi poduprla integraciju radnika iz trećih zemalja na tržište rada. Međutim, područja s najznačajnijim nedostacima uključuju borbu protiv prekomjernih kvalifikacija i upotrebu digitalnih alata. Što se tiče mekih vještina, tvrtke uočavaju znatne nedostatke u samorazvoju, računalnoj pismenosti i komunikacijskim vještinama. Kad je riječ o informacijama i savjetovanju, najznačajniji nedostaci su u poboljšanju znanja o tržištu rada, savjetovanju/mentorstvu/podučavanju i IT programima/aplikacijama.

Iako su tvrtke uložile značajne napore u sprječavanje diskriminacije i podizanje svijesti o raznolikosti, uočavaju nedostatke u pružanju tečajeva građanske/društveno-kulturne orijentacije.

Ispitanici smatraju da bi prioritet za olakšavanje zapošljavanja državljana trećih zemalja trebao biti skraćivanje trajanja pravnih postupaka, pojednostavnjenje postupka izdavanja radnih viza i omogućavanje podnošenja službenih zahtjeva i dokumenata putem interneta (slika 18.).



**Slika 18: Predložene izmjene propisa za olakšavanje zapošljavanja radnika iz trećih zemalja**



N=58

Izvor: Vlastiti izračuni na temelju ankete



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**RECRUIT4TOMORROW**

**Encouraging employment of third-country nationals  
through social dialogue**

**Deliverable D2.1**

**National Analysis Report for Hungary**



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## **Executive summary**

The deliverable, National Analysis Report for Hungary, presents the findings from the survey amongst Hungarian employers regarding the employment of third-country nationals in Hungary which was executed as part of the WP2 in the project. In the scope of WP2, we analysed and researched the challenges that labour market stakeholders are facing when dealing with the matching of labour supply and demand by employment of third-country nationals.

The presented deliverable is a detailed report from the national survey results in Hungary which will be a basis and a starting point for further analysis and social dialogue on all levels in WP3 where the consortia partners will prepare measures to address the labour market needs and recommendations for policymakers. The first part of the deliverable presents the national survey report in English and the second part (Chapter 2) presents the Hungarian translation.

## 1. RECRUIT4TOMORROW - Survey report on Hungary

This survey report presents insights based on descriptive statistics from a sample of Hungarian firms. Conducted between April 22 and June 30, 2024, the survey received complete or partial responses from 109 companies (5 in English and 104 companies in Hungarian) regarding the employment of third-country nationals. The report begins with a summary of the sample characteristics and the current state of employing foreign and third-country workers, their origins, and their wages. The second part explores the advantages and barriers of employing third-country workers, their representation, and the gaps in support for their employment.

### 1.1. Sample characteristics

The characteristics of the companies included in the sample are shown in Table 1.

**Table 1: Company size, classification and industry**

		Frequency	Percent
<b>Size (number of workers) (N = 109)</b>	Less than 10	25	23%
	11-50	30	27%
	51-250	23	21%
	251-500	9	8%
	More than 500	22	20%
<b>Company classification (N = 108)</b>	Family-owned company	31	28%
	Domestic private company	53	48%
	Domestic public company	3	3%
	MNE subsidiary	18	16%
	Other	3	3%
<b>Industry (N = 108)</b>	Construction	10	9%
	Hospitality and tourism	3	3%
	Healthcare	2	52%
	Manufacturing	11	10%
	Oil and gas sector	1	1%
	Automotive sector	4	4%
	ICT (IT) sector	16	15%
	Trade	7	6%
Other services	54	49%	

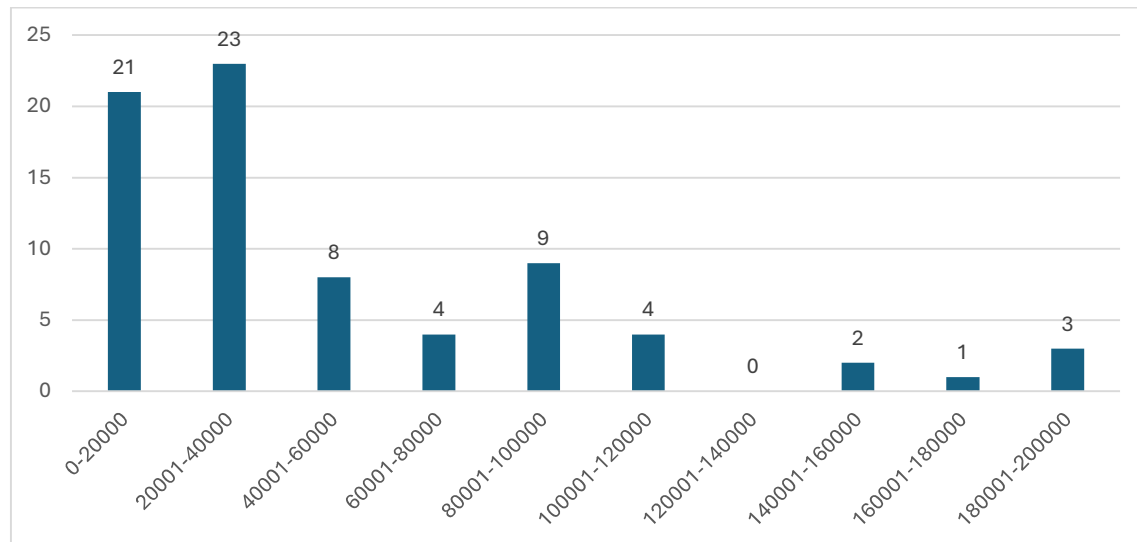
Source: Own calculations based on the survey

In 2023, the average value added per worker among companies surveyed was EUR 51,682.7<sup>1</sup> per year. The distribution of value added per worker among the surveyed companies shows a

<sup>1</sup> Std. deviation: 47,811.51 EUR, min: 10,000, max: 200,000

broad spectrum with a concentration in the middle ranges. Most of the respondents fall into the EUR 20,001 to EUR 40,000 range (Figure 1).

**Figure 1: Value added per worker (per year, in EUR) in 2023**



N=75

Source: Own calculations based on the survey

Additionally, the average gross wage reported by the companies surveyed is EUR 3,345.2<sup>2,3</sup> per month. The distribution of average gross wages among the surveyed companies shows that many companies in the sample offer wages in the range of up to EUR 1,738 per month.

The survey included a wide range of respondents from different positions within their respective organisations (Table 2). The characteristics of the respondents show a significant representation from the management, in line with the focus of the survey. More than two-thirds of the respondents were men.

**Table 2: Respondent's position in the company**

	Frequency	Percent
CEO / Director / Member of the management board	59	54%
Head of HR	21	19%
HR professional	10	9%
Head of Legal Department	0	0%
Legal professional	3	3%
Other	11	10%

N=104

Source: Own calculations based on the survey

In addition, all but one respondent has at least 5 years of work experience, with most having more than 15 years in their respective fields (Table 3).

<sup>2</sup> Std. deviation: 816,866, min: 100, max: 4,417

<sup>3</sup> The average gross wage in Hungary in 2023 was EUR 1502.82.

**Table 3: Duration of working experience of respondents**

	<b>Frequency</b>	<b>Percent</b>
Less than 5 years	1	1%
5 - 15 years	15	14%
16 - 25 years	30	27%
26 - 35 years	32	29%
More than 35 years	26	24%

N=104

Source: Own calculations based on the survey

## 1.2. Employment of foreign workers – current situation

The majority, namely, 59% of the companies surveyed reported that they currently do not employ foreign workers (Table 4). 38% of respondents reported that they do employ foreign workers, and among those who employ foreign workers almost 80% reported that they employ non-EU workers.

**Table 4: Employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
Yes	42	38%
No	65	59%

N=107

Source: Own calculations based on the survey

For those companies that do not currently employ foreign workers (Table 5), their future plans for employing foreign workers were also examined. Of these respondents, 8% (5 respondents) plan to employ foreign workers in the future. Specifically, only 8 of these respondents indicated that they plan to employ third-country workers. Conversely, 74% (45 respondents) do not plan to employ foreign workers in the future.

**Table 5: Strategy for future employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
We plan to employ foreign workers in the future	5	8%
We plan to employ third-country workers in the future	8	13%
We do not plan to employ any foreign workers in the future	45	74%
Other	3	6%

N=61

Source: Own calculations based on the survey



### 1.3. Employment of third-country (non-EU) workers

Looking at the number of non-EU workers currently employed in the companies, 50% of the respondents reported that less than 5% of their workforce consisted of non-EU workers, while 13% reported between 6% and 10%. Notably, 25% of companies have more than 20% non-EU nationals in their workforce (Table 6). These companies operate in construction, manufacturing and other services.

**Table 6: Distribution of third-country workers in the workforce**

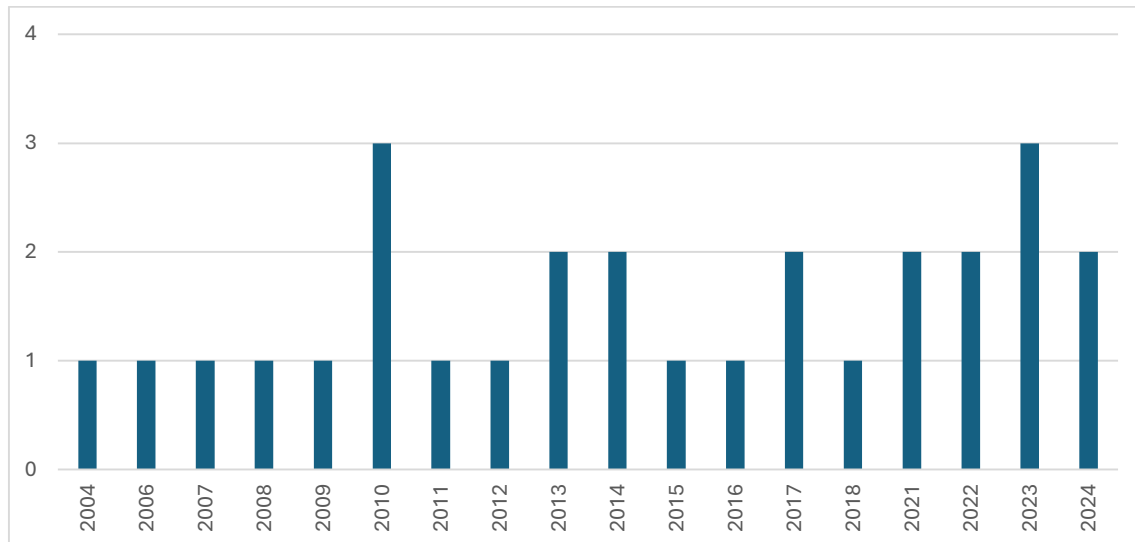
	Frequency	Percent
Less than 5% of the total workforce	16	50%
6-10%	4	13%
11-15%	2	6%
16-20%	1	3%
More than 20%	8	25%
Don't know exactly	1	3%

N=32

Source: Own calculations based on the survey

Figure 2 shows that while some companies have been employing third-country nationals since 2004, the dynamics increased after 2021. There were significant and noticeable peaks in 2010 and 2023 (Figure 2).

**Figure 2: Number of companies reporting start of employment for third-country nationals by year**



N=29

Source: Own calculations based on the survey

The results suggest that while the third-country workers in the surveyed companies come from a variety of educational backgrounds, there is a significant representation of those with secondary and tertiary education. More than half of the respondents (61%) believe that the educational structure of third-country workers is comparable to that of the general workforce in the company. 9% of respondents think that third-country workers have a lower average

level of education (Table 7). Few people arrive with less than primary education. It is also worth noting that a bit more than a third of third-country workers are women. The age structure of third-country workers in the companies surveyed shows that the majority are between 31 and 40 years old.

**Table 7: Company vs. third-country worker educational levels**

	<b>Frequency</b>	<b>Percent</b>
Comparable	14	61%
On average, third-country workers have lower education.	2	9%
On average, third-country workers have higher education.	4	17%
Difficult to answer	1	4%
Other	2	9%

N=23

Source: Own calculations based on the survey

More than half of respondents reported that non-EU workers are predominantly employed for production work, followed by professional and technical (36%) and service work (17%). Non-EU workers are predominantly employed for elementary work in almost 20% of firms. (Table 8).

**Table 8: Job types of third-country workers**

	<b>Frequency</b>	<b>Percent</b>
Service work (sales, personal care, protective services, personal services, etc)	4	17%
Professional and technical work (healthcare services, legal and other professional services, science and engineering professional services, etc)	8	36%
Production work	12	52%
Elementary work (cleaning services, agriculture, fishing and forestry services, food preparation assistance, etc.)	4	17%
Managerial work	2	9%
Other	3	13%

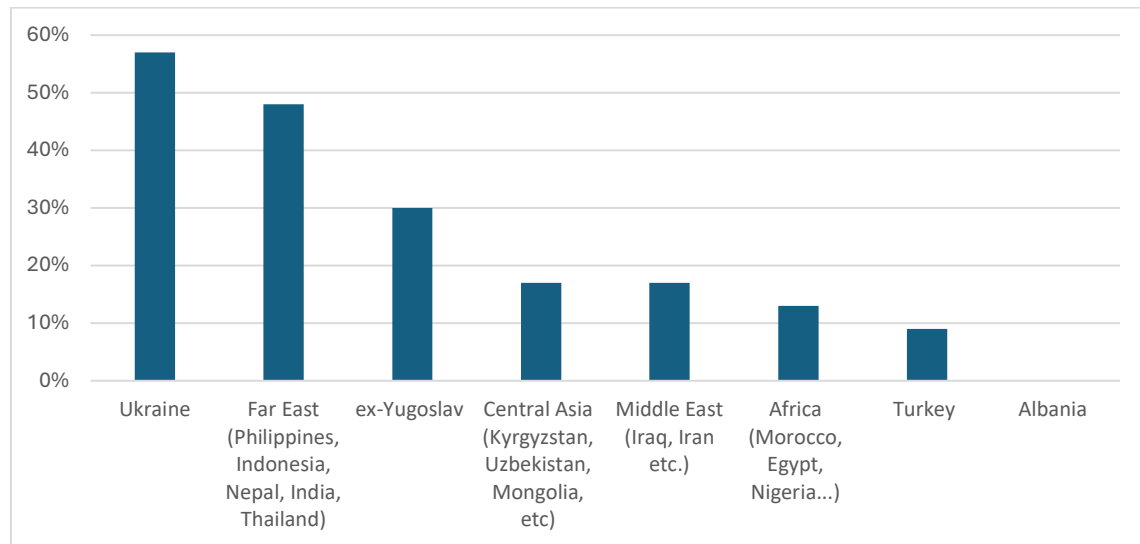
N=23

Source: Own calculations based on the survey

### 1.4. The origin of third-country workers

The survey results indicate that third-country workers predominantly came from Ukraine and countries in the Far East such as the Philippines, Indonesia, Nepal, and Thailand. Additionally, a significant number of third-country workers are from former Yugoslav countries (Bosnia and Herzegovina, Serbia, Montenegro, North Macedonia) and Kosovo. (Figure 3).

**Figure 3: The origin of third-country workers**



N=23

Source: Own calculations based on the survey

When asked which ex-Yugoslav countries the workers originate from, the only answer was Serbia.

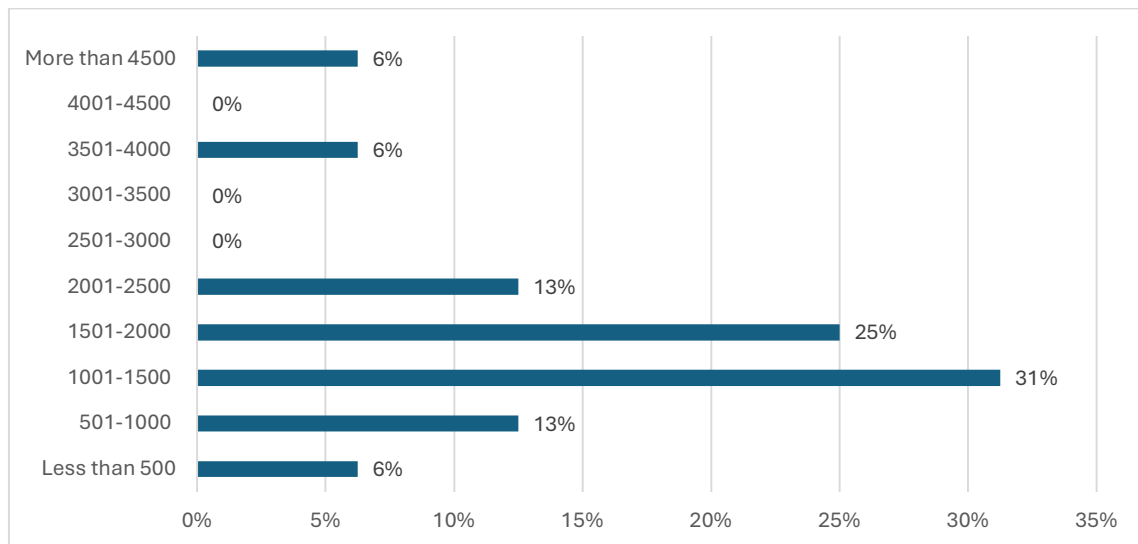
### 1.5. Wages of third-country workers

The average gross wage of third-country workers in the surveyed companies is EUR 1,731.<sup>4</sup> The average gross wage for third-country workers is a bit lower than the overall company average of EUR 1,738 per month. Figure 4 illustrates the distribution of average gross wages (per month, in EUR) paid to third-country workers in the surveyed companies.

---

<sup>4</sup> Std. deviation: 1.177,29, min: 152 max: 5000

**Figure 4: Distribution of average gross wages paid to third-country workers (per month, in EUR)**



N=16

Source: Own calculations based on the survey

A slight numerical difference in average wages was also confirmed by qualitative assessment of respondents. The majority of companies consider the wages of third-country workers to be comparable to those of their other employees (Table 9).

**Table 9: Qualitatively comparing average gross wages of third-country workers to other workers in the same company**

	Frequency	Percent
Lower	0	0%
Comparable	21	100%
Higher	0	0%
I don't know	0	0%

N=21

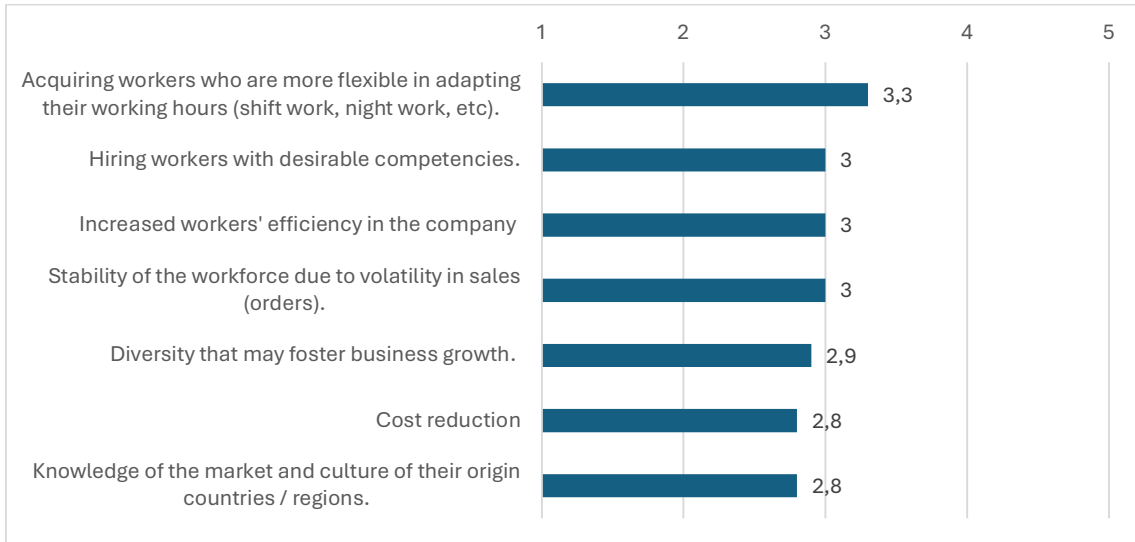
Source: Own calculations based on the survey

One of the companies surveyed stated that they received a subsidy for employing third-country workers that other workers were not entitled to but didn't provide any details about it. The rest of the respondents stated that they received no subsidies for employing third-country workers that other workers were not entitled to.

## 1.6. Advantages and barriers in employing third-country workers

The main advantage that companies see in employing third-country nationals is being more flexible in terms of working hours. The lowest level of agreement was with the statement that they benefit from their employment in terms of cost reduction and their knowledge of the market and the culture of their origin countries. (Figure 5).

**Figure 5: Advantages of employing third-country workers (1 = fully disagree, 5 = fully agree)**

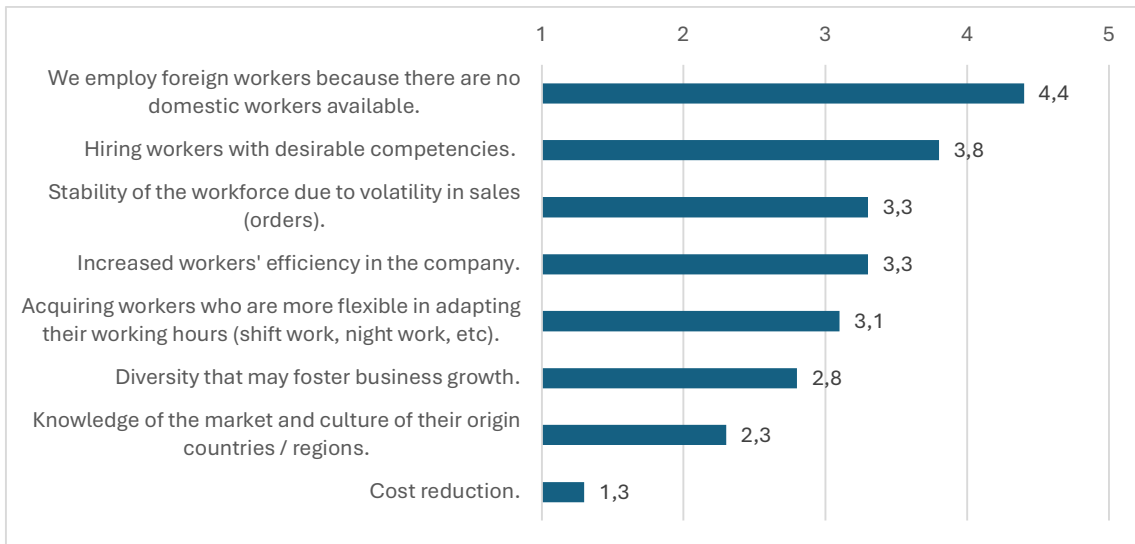


N=49

Source: Own calculations based on the survey

It is clear that one of the main reasons why companies decide to employ foreign workers is because of a lack of domestic workers and to obtain workers with the appropriate competencies. The respondents, on average, disagree with statements that they are acquiring non-EU workers because of diversity, cultural and market knowledge or cost reduction (Figure 6).

**Figure 6: Reasons for employing third-country workers (1 = fully disagree, 5 = fully agree)**

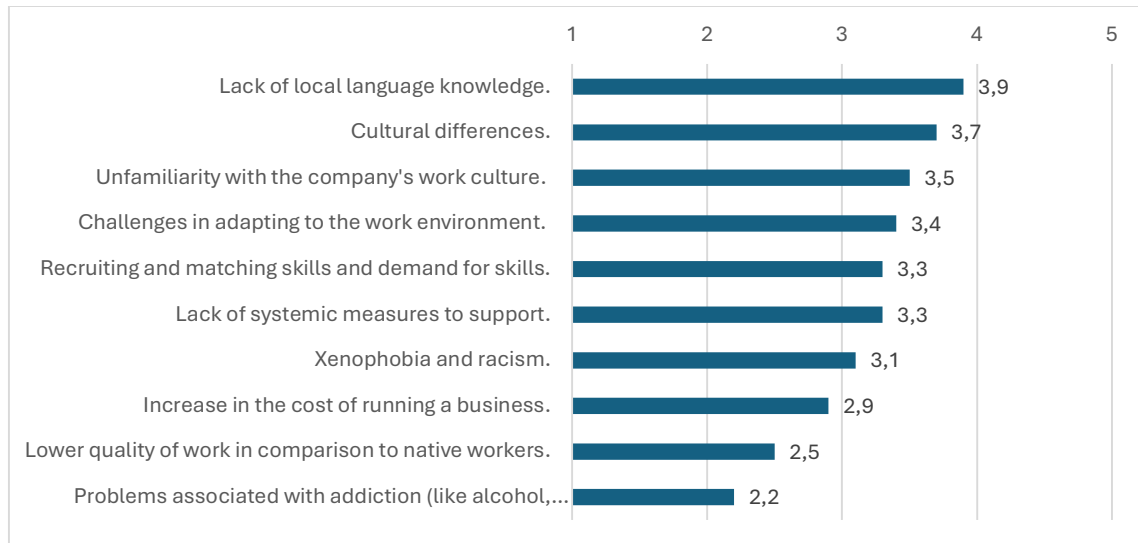


N=19

Source: Own calculations based on the survey

Respondents consider a lack of knowledge of the local language and cultural differences to be the biggest potential problems associated with employing third-country workers (Figure 7).

**Figure 7: Potential problems related to employing third-country workers (1 = fully disagree, 5 = fully agree)**

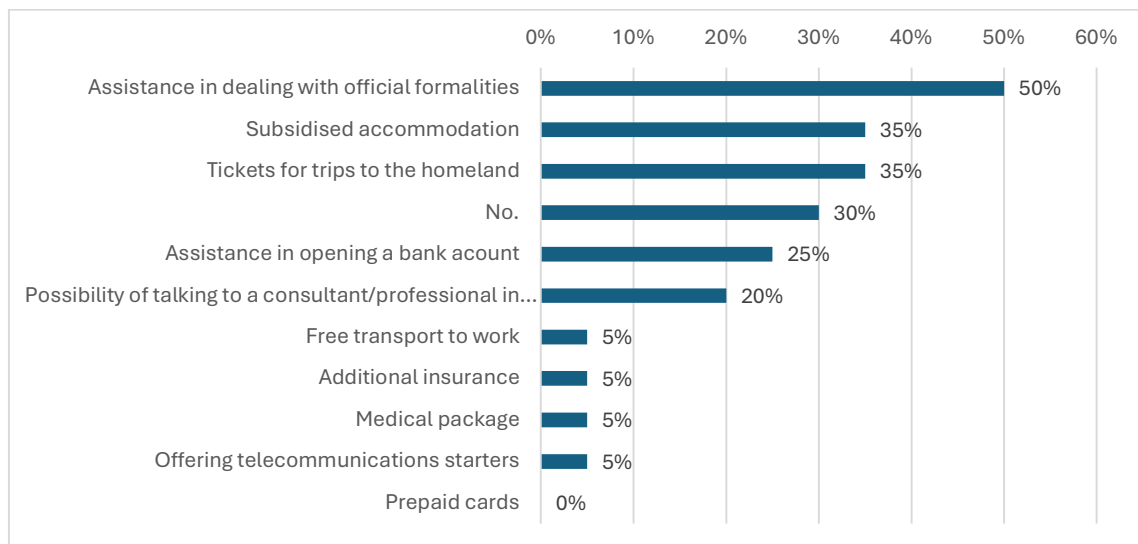


N=76

Source: Own calculations based on the survey

Regarding the amenities, offered to third-country workers, 50% of the respondents offer third-country workers help with official formalities, 35% subsidized accommodation and tickets for trips to the homeland, and 25% assistance in opening a bank account (Figure 8). 30% of respondents don't offer any amenities specifically to third-country workers.

**Figure 8: Amenities offered to third-country workers**



N=20

Source: Own calculations based on the survey

The survey results indicate that language and cultural barriers and the need for assistance with legal procedures are the most significant barriers to employing third-country workers (Figure 9). The complexity of legal activities, as well as the need to navigate health-related

procedures, to find suitable accommodation and lack of trust, are also significant challenges. The time needed to adapt is perceived as a little less significant barrier.

**Figure 9: Barriers in employing third-country workers (1 = fully disagree, 5 = fully agree)**



N=76

Source: Own calculations based on the survey

There is a high agreement about the wide range of formal barriers related to legal activities (Figure 10). However, the firms (on average) don't perceive any consequences because of that (Figure 11).

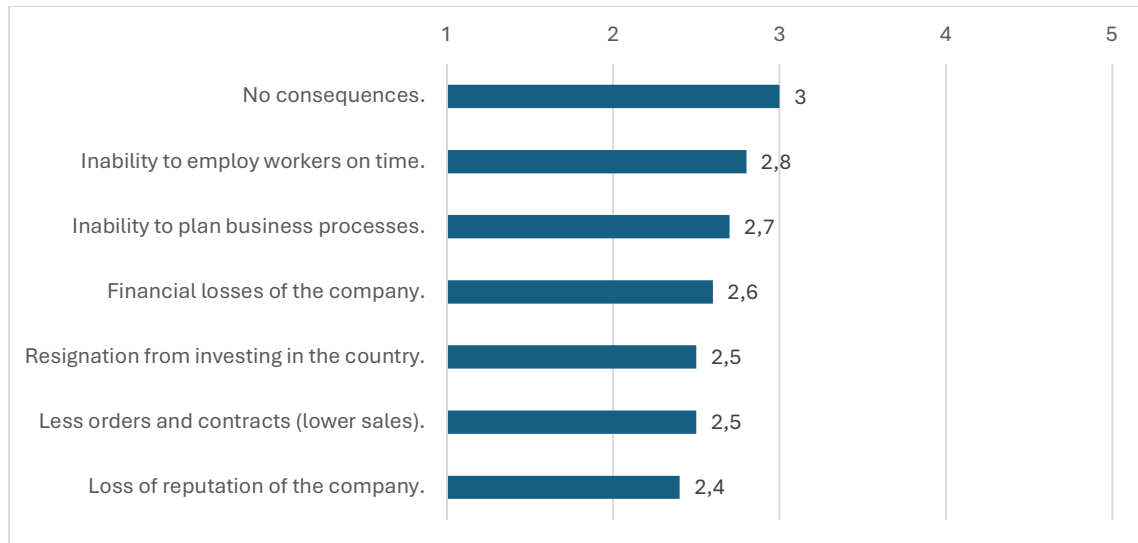
**Figure 10: Formal barriers that are related to legal activities (1 = fully disagree, 5 = fully agree)**



N=39

Source: Own calculations based on the survey

**Figure 11: Consequences of obstacles that companies face when employing third-country workers (1 = fully disagree, 5 = fully agree)**

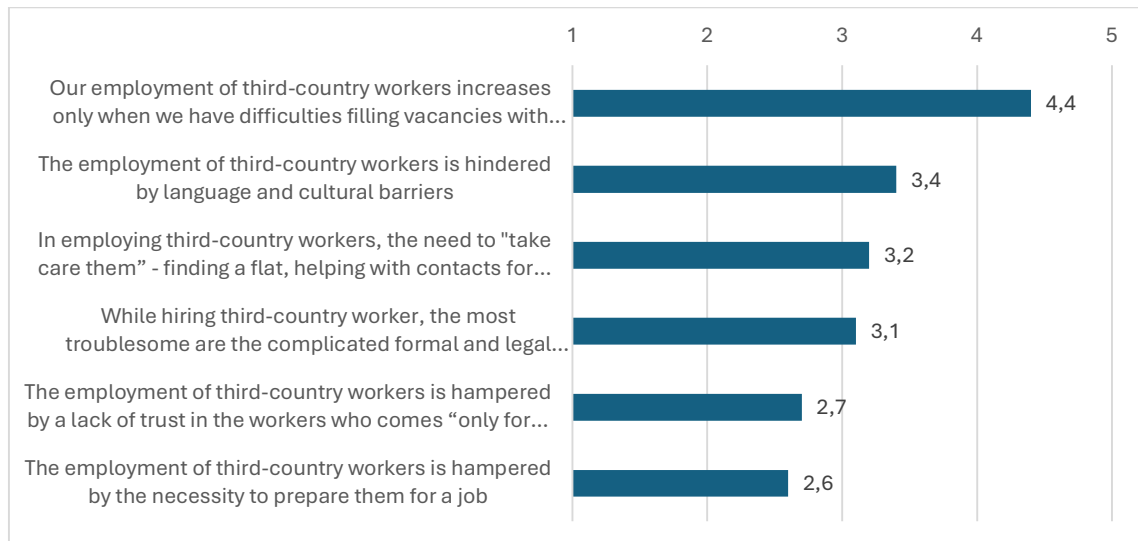


N=71

Source: Own calculations based on the survey

Most respondents highly agree with the statement that employment of third-country nationals increases only when they have difficulties filling vacancies with natives. They also agree that the employment of third-country workers is hindered by language and cultural barriers and that they need to take care of them. (Figure 12).

**Figure 12: Evaluation of statements regarding the employment of third-country workers (1 = fully disagree, 5 = fully agree)**



N=20

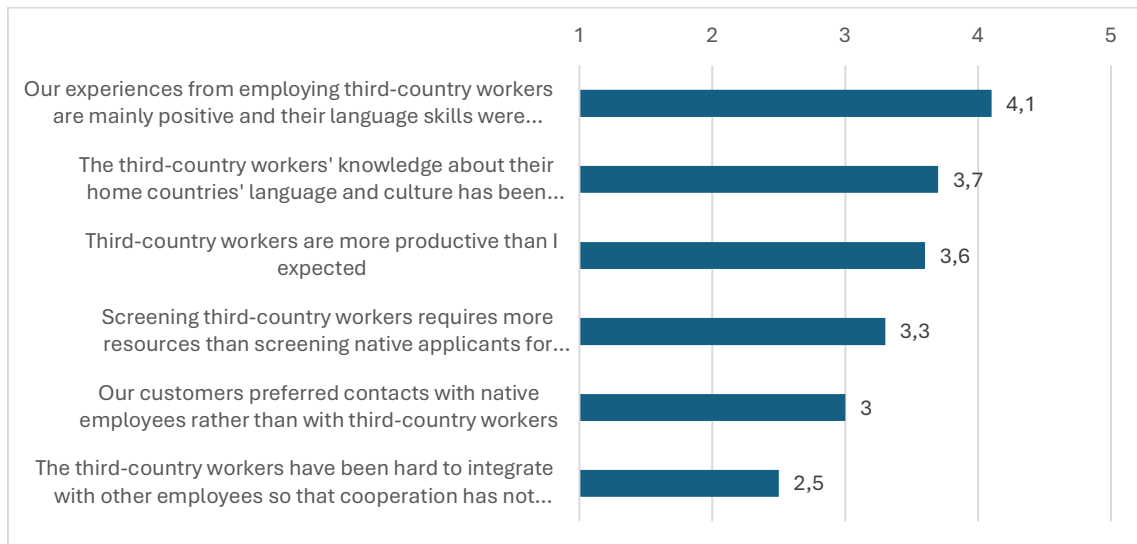
Source: Own calculations based on the survey

In general, however, the experience of employing third-country workers is mainly positive and their language skills have been sufficient for them to do a good job (Figure 13). Companies



generally disagree that third-country workers have been difficult to integrate with other employees.

**Figure 13: Experiences with employing third-country employees (1 = fully disagree, 5 = fully agree)**



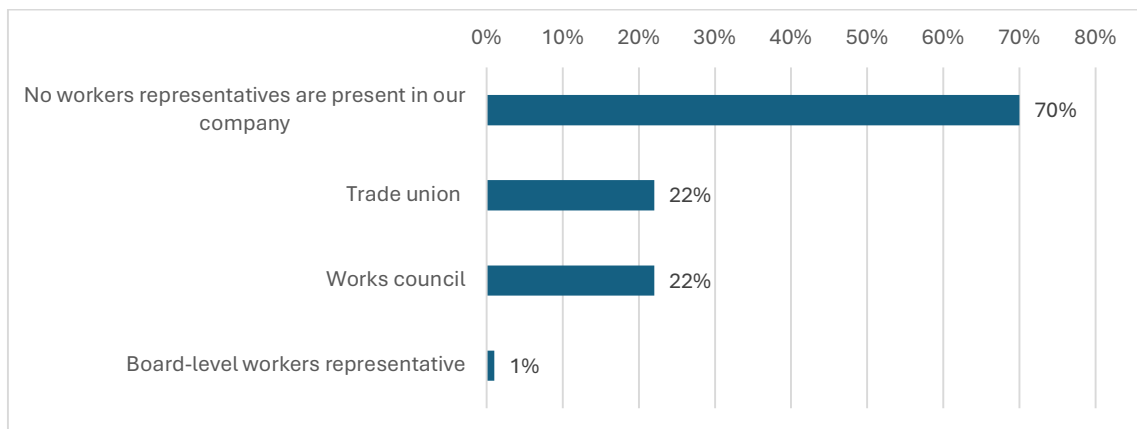
N=20

Source: Own calculations based on the survey

### 1.7. Workers' representation in companies

The companies surveyed first reported the form of workers' representation in their company (they could choose one or more forms). Most of the companies (70%) do not have any form of workers' representation. However, many companies have a trade union (22%) and works council (22%) as the form of representation (Figure 14).

**Figure 14: Workers representation in companies**

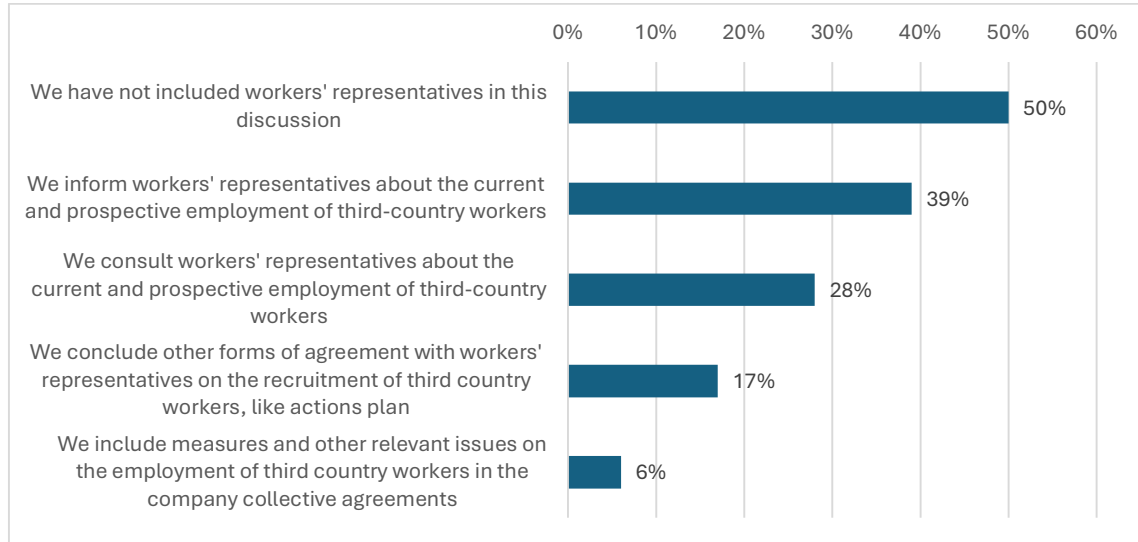


N=79

Source: Own calculations based on the survey

More than half of the respondents who have some form of workers' representation in their company did not involve workers' representatives in the discussion of the challenges posed by third-country workers (Figure 15). The situation is very similar when it comes to their future plans (Figure 16).

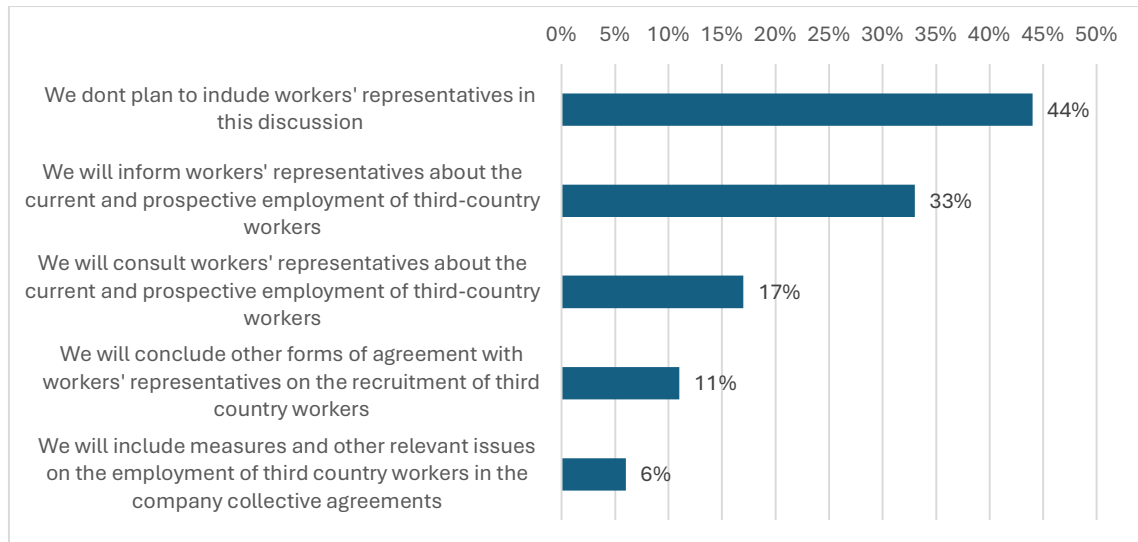
**Figure 15: Dealing with the challenges related to third-country workers**



N=18

Source: Own calculations based on the survey

**Figure 16: Plans to deal with the challenges related to third-country workers**



N=18

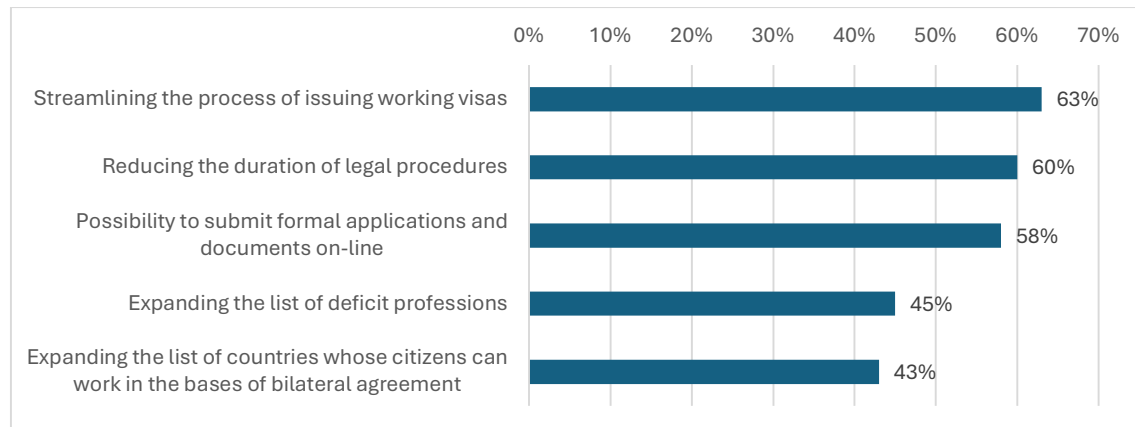
Source: Own calculations based on the survey

Moreover, more than half (57%) of the respondents are not aware of the social partners' discussions on employment and challenges related to third-country workers at the sectoral and national level. Slightly more than a quarter, 35%, of the respondents are aware of the discussions but do not know what they are about.

## 1.8. Gaps in supporting the employment of third-country nationals

Respondents believe that the priority for facilitating the employment of third-country nationals should be to reduce the length of legal procedures, streamline the process for issuing work visas and allow formal applications and documents to be submitted online (Figure 17).

**Figure 17: Proposed changes in regulations to facilitate third-country workers employment**



N=67

Source: Own calculations based on the survey

The survey revealed that many respondents do not have an employer representative body, while some have a trade union or works council. Typically, SMEs have no representative body, while large companies usually have one or two. Some respondents inform workers' representatives about the employment of third-country workers. Others consult with workers' representatives or include these issues in company collective agreements. A few have other agreements such as action plans. A significant number do not involve employee representatives in these challenges. Future plans to address these challenges are not expected to change significantly. Several respondents are aware of sectoral and national discussions but are unsure of the content. A few are aware of the content and only one is actively involved. More than half of the respondents are not aware of such discussions. The size of the company does not affect awareness of these discussions. Many respondents mention vocational or on-the-job training for labour market integration. Others mention skills assessment. Most respondents do not consider over-qualification relevant. Measures to develop soft skills include language training at the workplace and other language courses. Some offer computer training, while others focus on communication skills. Half of the respondents emphasise self-development. Some rely on the provision of labour market skills, while others use counselling, mentoring and coaching. Careers advice and information on their website are also common. Printed materials and computer programmes and applications are preferred by some. A significant number focus on preventing discrimination. Many raise awareness of diversity in the workplace, especially in large companies. Some offer civic/social/cultural orientation courses for inclusion.

## 2. Recruit4Tomorrow - Magyar felmérési jelentés

Ez a jelentés a magyar vállalatok körében végzett felmérés eredményein alapuló leíró statisztikai adatokat elemzi. A 2024. április 22. és június 30. közötti időszakban 109 vállalattól (5 angol és 104 magyar nyelvű vállalattól) gyűjtött teljes vagy részleges válaszok alapján mutatja be a harmadik országokból származó állampolgárok foglalkoztatási helyzetét. A jelentés elején a mintajellemzőit, a külföldi és harmadik országbeli munkaerő jelenlegi foglalkoztatási helyzetének, származási helyének és bérezésének összegzését találjuk. A második rész a harmadik országbeli munkavállalók alkalmazásának előnyeit, kihívásait, képviselési formáit, valamint a támogatásukra vonatkozó hiányosságokat tárgyalja.

### 2.1. A mintajellemzői

A mintában szereplő vállalatok jellemzőit az 1. táblázat tartalmazza.

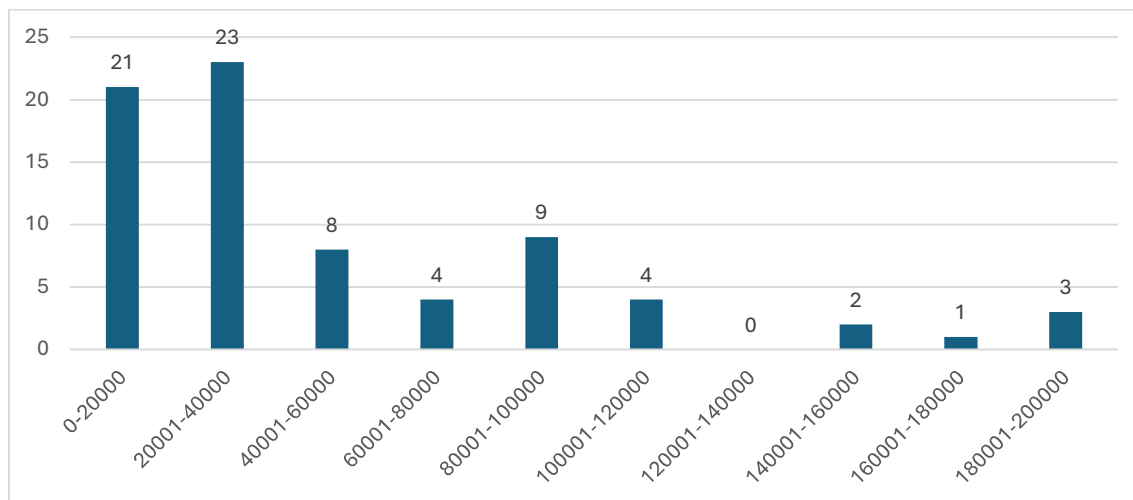
Táblázat 10: A vállalat mérete, besorolása és ágazata

		Frekvencia	Százalék
<b>Méret (munkavállalók száma) (N = 109)</b>	Kevesebb, mint 10	25	23%
	11-50	30	27%
	51-250	23	21%
	251-500	9	8%
	Több mint 500	22	20%
<b>A vállalat besorolása (N = 108)</b>	Családi tulajdonú vállalat	31	28%
	Belföldi magánvállalat	53	48%
	Belföldi állami vállalat	3	3%
	Multinacionális vállalat leányvállalata	18	16%
	Egyéb	3	3%
<b>Iparág (N = 108)</b>	Építőipar	10	9%
	Vendéglátás és turizmus	3	3%
	Egészségügy	2	52%
	Gyártás	11	10%
	Olaj- és gázipar	1	1%
	Autóipar	4	4%
	IKT (IT) ágazat	16	15%
	Kereskedelem	7	6%
Egyéb szolgáltatások	54	49%	

Forrás: Saját számítások a felmérés alapján

2023-ban az egy munkavállalóra jutó átlagos hozzáadott érték a megkérdezett vállalatok körében 51 682,7 euró<sup>5</sup> évente. Az egy munkavállalóra jutó hozzáadott érték megoszlása a megkérdezett vállalatok között széles spektrumot mutat, a középső tartományokban koncentrálódva. A válaszadók többsége a 20 001 és 40 000 EUR közötti tartományba tartozik (1. ábra).

**Ábra 1: Az egy munkavállalóra jutó hozzáadott érték (évente, euróban) 2023-ban**



N=75

Forrás: Saját számítások a felmérés alapján

Ezenfelül a megkérdezett vállalatok által bejelentett bruttó átlagbére havi 3 345,2 euró<sup>6,7</sup>. A bruttó átlagbérek megoszlása a megkérdezett vállalatok között azt mutatja, hogy a mintában szereplő vállalatok közül sokan havi 1.738 euróig terjedő béreket kínálnak.

A felmérésben a válaszadók széles köre vett részt, akik különböző pozíciókat töltöttek be az adott szervezetben belül (2. táblázat). A válaszadók jellemzői azt mutatják, hogy a felmérés fókuszának megfelelően a vezetőség jelentős mértékben képviselteti magát. A válaszadók több mint kétharmada férfi volt.

**Táblázat 11: A válaszadó pozíciója a vállalatnál**

	Frekvencia	Százalék
Ügyvezető igazgató / igazgató / igazgatótanácsi tag	59	54%
HR-vezető	21	19%
HR-szakember	10	9%
Jogi osztály vezetője	0	0%
Jogi szakember	3	3%
Egyéb	11	10%

N=104

Forrás: Saját számítások a felmérés alapján

<sup>5</sup> Std. eltérés: 47 811,51 EUR, min: 10 000, max: 200 000

<sup>6</sup> Std. eltérés: 816,866, min: 100, max: 4,417

<sup>7</sup> A magyarországi bruttó átlagbér 2023-ban 1502,82 euró volt.

Ezenkívül egy kivétellel minden válaszadó legalább 5 éves munkatapasztalattal rendelkezik, a legtöbbjük pedig több mint 15 éves szakmai tapasztalattal (3. táblázat).

**Táblázat 12: A válaszadók munkatapasztalatának időtartama**

	<b>Frekvencia</b>	<b>Százalék</b>
Kevesebb, mint 5 év	1	1%
5 - 15 év	15	14%
16 - 25 év	30	27%
26 - 35 év	32	29%
Több mint 35 éve	26	24%

N=104

Forrás: Saját számítások a felmérés alapján

## 2.2. Külföldi munkavállalók foglalkoztatása - jelenlegi helyzet

A megkérdezett vállalatok többsége, azaz 59%-a arról számolt be, hogy jelenleg nem foglalkoztat külföldi munkavállalókat (4. táblázat). A válaszadók 38%-a jelezte, hogy foglalkoztat külföldi munkavállalókat, és a külföldi munkavállalókat foglalkoztatók közel 80%-a jelezte, hogy nem uniós munkavállalókat foglalkoztat.

**Táblázat 13: Külföldi munkavállalók foglalkoztatása**

	<b>Frekvencia</b>	<b>Százalék</b>
Igen	42	38%
Nem	65	59%

N=107

Forrás: Saját számítások a felmérés alapján

Azon vállalatok esetében, amelyek jelenleg nem foglalkoztatnak külföldi munkavállalókat (5. táblázat), a külföldi munkavállalók foglalkoztatására vonatkozó jövőbeli terveiket is megvizsgálták. A válaszadók 8%-a (5 válaszadó) tervezi, hogy a jövőben külföldi munkavállalókat alkalmaz. Konkrétan csak 8 válaszadó jelezte, hogy tervezi harmadik országbeli munkavállalók alkalmazását. Ezzel szemben 74% (45 válaszadó) nem tervezi külföldi munkavállalók alkalmazását a jövőben.

**Táblázat 14: A külföldi munkavállalók jövőbeli foglalkoztatására vonatkozó stratégia**

	<b>Frekvencia</b>	<b>Százalék</b>
A jövőben külföldi munkavállalókat tervezünk alkalmazni	5	8%
Tervezzük, hogy a jövőben harmadik országbeli munkavállalókat alkalmazunk.	8	13%
A jövőben nem tervezünk külföldi munkavállalókat alkalmazni.	45	74%
Egyéb	3	6%

N=61

Forrás: Saját számítások a felmérés alapján

### 2.3. Harmadik országbeli (nem uniós) munkavállalók foglalkoztatása

A jelenlegi foglalkoztatási helyzetet tekintve a vállalatoknál dolgozó nem uniós munkavállalók aránya alapján a válaszadók 50%-a jelezte, hogy a munkaerő kevesebb mint 5%-a tartozik ebbe a csoportba. További 13% nyilatkozott úgy, hogy ez az arány 6% és 10% között van. Érdeemes megemlíteni, hogy a vállalatok 25%-a több mint 20%-os arányban foglalkoztat nem uniós állampolgárokat, különösen az építőiparban, a feldolgozóiparban, valamint az egyéb szolgáltatási szektorokban (6. táblázat).

**Táblázat 15: A harmadik országbeli munkavállalók megoszlása a munkaerőpiacon**

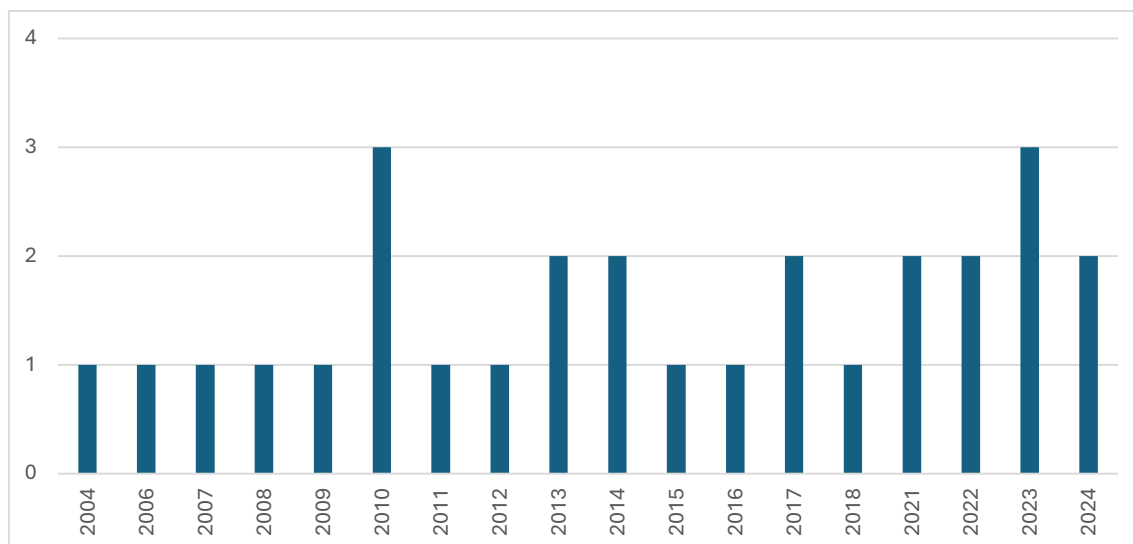
	<b>Frekvencia</b>	<b>Százalék</b>
A teljes munkaerő kevesebb mint 5%-a	16	50%
6-10%	4	13%
11-15%	2	6%
16-20%	1	3%
Több mint 20%	8	25%
Nem tudom pontosan	1	3%

N=32

Forrás: Saját számítások a felmérés alapján

A 2. ábra azt szemlélteti, hogy bár egyes vállalatok már 2004 óta foglalkoztatnak harmadik országbeli állampolgárokat, a dinamika 2021 után jelentősen felgyorsult/megnőtt. Kiemelkedő csúcsok voltak megfigyelhetők 2010-ben és 2023-ban, amelyek különösen érezhető növekedést mutatnak (2. ábra).

**Ábra 2: A harmadik országbeli állampolgárok foglalkoztatásának megkezdését bejelentő vállalatok száma évenként**



N=29

Forrás: Saját számítások a felmérés alapján

Az eredmények azt mutatják, hogy bár a megkérdezett vállalatoknál dolgozó harmadik országbeli munkavállalók különböző iskolai végzettséggel rendelkeznek, a közép- és felsőfokú

végzettségűek jelentős arányban vannak jelen. A válaszadók több mint fele (61%) úgy véli, hogy a harmadik országbeli munkavállalók iskolai végzettségi struktúrája hasonló a vállalatnál dolgozó általános munkaerőéhez. Mindössze a válaszadók 9%-a gondolja úgy, hogy a harmadik országbeli munkavállalók átlagos iskolai végzettsége alacsonyabb (7. táblázat). Kevés munkavállaló érkezik általános iskolai végzettségű alacsonyabb szinttel. Érdeemes megjegyezni, hogy a harmadik országbeli munkavállalók valamivel több mint egyharmada nő. A megkérdezett vállalatoknál dolgozó harmadik országbeli munkavállalók életkori struktúrája azt mutatja, hogy a többség 31 és 40 év közötti.

**Táblázat 16: Vállalati és harmadik országbeli munkavállalók iskolai végzettsége**

	<b>Frekvencia</b>	<b>Százalék</b>
Nagyjából azonos	14	61%
A harmadik országbeli munkavállalók összességében alacsonyabb végzettségűek.	2	9%
A harmadik országbeli munkavállalók összességében magasabb végzettségűek.	4	17%
Nehéz megválaszolni	1	4%
Egyéb	2	9%

N=23

Forrás: Saját számítások a felmérés alapján

A válaszadók több mint fele jelezte, hogy a nem uniós munkavállalókat túlnyomórészt termelési munkára alkalmazzák, ezt követi a szakmai és műszaki (36%) és a szolgáltatási munka (17%). A nem uniós munkavállalókat a cégek közel 20%-ánál túlnyomórészt egyszerű munkára alkalmazzák. (8. táblázat).

**Táblázat 17: A harmadik országbeli munkavállalók munkaköri típusai**

	<b>Frekvencia</b>	<b>Százalék</b>
Szolgáltatás (értékesítés, személyi gondozás, védelmi szolgáltatások, személyes szolgáltatások stb.)	4	17%
Szakmai és műszaki munka (egészségügyi szolgáltatás, jogi és egyéb szakmai szolgáltatások, tudományos és mérnöki szakmai szolgáltatás stb.)	8	36%
Termelés	12	52%
Különösebb végzettséget nem igénylő munka (takarítási szolgáltatás, mezőgazdasági, halászati és erdészeti szolgáltatás, élelmiszer-előkészítésben való közreműködés stb.)	4	17%
Vezetői munka	2	9%
Egyéb	3	13%

N=33

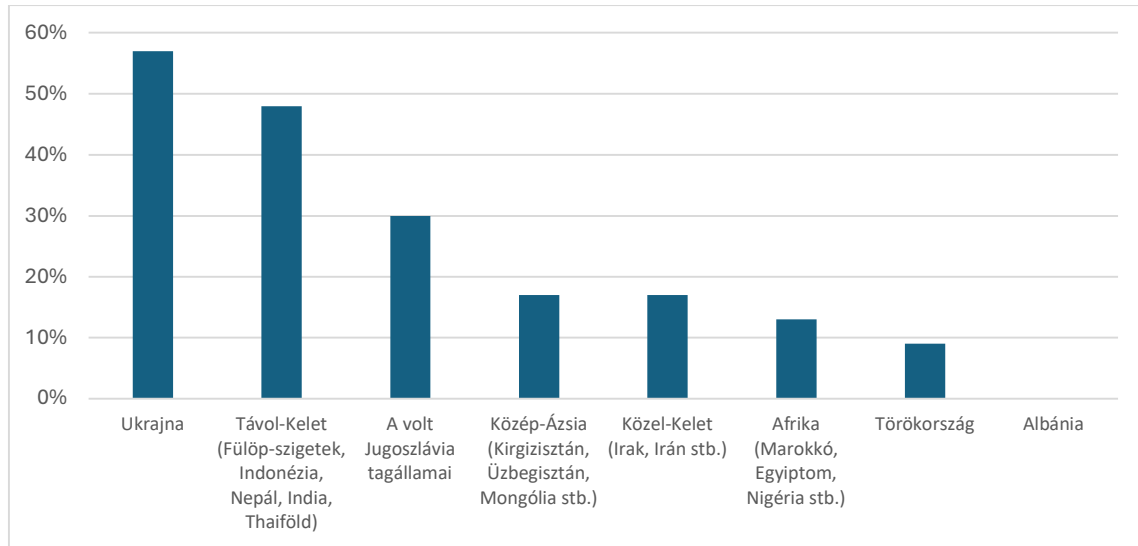
Forrás: Saját számítások a felmérés alapján



## 2.4. A harmadik országbeli munkavállalók eredete

A felmérés eredményei azt mutatják, hogy a harmadik országbeli munkavállalók túlnyomórészt Ukrajnából és távol-keleti országokból, például a Fülöp-szigetektől, Indonéziából, Nepálból és Thaiföldről érkeztek. Emellett a harmadik országbeli munkavállalók jelentős része a volt jugoszláv országokból (Bosznia-Hercegovina, Szerbia, Montenegró, Észak-Macedónia) és Koszovóból származik. (3. ábra).

Ábra 3: A harmadik országbeli munkavállalók eredete



N=23

Forrás: Saját számítások a felmérés alapján

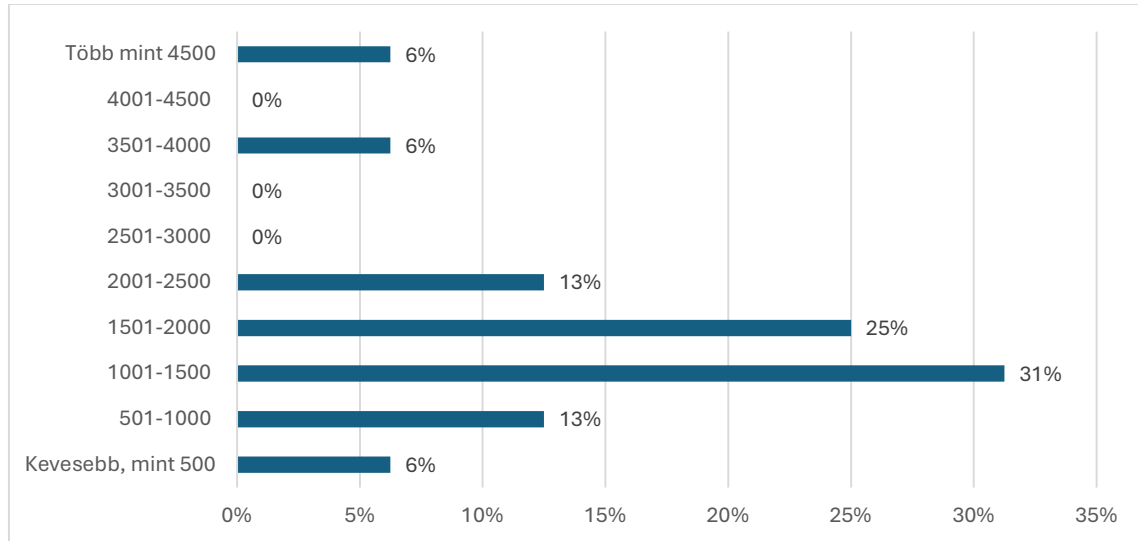
Arra a kérdésre, hogy mely volt jugoszláv országokból származnak a munkavállalók, az egyetlen válasz Szerbia volt.

## 2.5. A harmadik országbeli munkavállalók bére

A harmadik országbeli munkavállalók átlagos bruttó bére a vizsgált vállalatoknál 1731 euró.<sup>8</sup> A harmadik országbeli munkavállalók átlagos bruttó bére valamivel alacsonyabb, mint a teljes vállalati átlag, amely havi 1 738 euró. A 4. ábra a megkérdezett vállalatoknál a harmadik országbeli munkavállalóknak fizetett bruttó átlagbérek (havi bruttó bér, euróban) megoszlását mutatja.

<sup>8</sup> Std. eltérés: 1.177,29, min: 152 max: 5000

**Ábra 4: A harmadik országbeli munkavállalóknak fizetett bruttó átlagbérek megoszlása (havonta, euróban)**



N=16

Forrás: Saját számítások a felmérés alapján

Az átlagbérek közötti különbségek minimálisak, amit a válaszadók minőségi értékelése is megerősített. A vállalatok egyöntetűen úgy vélik, hogy a harmadik országbeli munkavállalók bére gyakorlatilag megegyezik a többi foglalkoztatott bérével (9. táblázat).

**Táblázat 18: A harmadik országbeli munkavállalók bruttó átlagbérének minőségi összehasonlítása az ugyanazon vállalatnál dolgozó többi munkavállalóval**

	Frekvencia	Százalék
Alacsonyabb	0	0%
Nagyjából azonos	21	100%
Magasabb	0	0%
Nem tudom.	0	0%

N=21

Forrás: Saját számítások a felmérés alapján

A megkérdezett vállalatok közül egy azt állította, hogy olyan támogatást kaptak harmadik országbeli munkavállalók foglalkoztatásáért, amelyre más munkavállalók nem jogosultak, de erről nem közöltek részleteket. A többi válaszadó azt állította, hogy nem kapott olyan támogatást harmadik országbeli munkavállalók foglalkoztatására, amelyre más munkavállalók nem voltak jogosultak.

## 2.6. A harmadik országbeli munkavállalók alkalmazásának előnyei és akadályai

A vállalatok a harmadik országbeli állampolgárok foglalkoztatásának fő előnyét abban látják, hogy rugalmasabbak a munkaidő-beosztás tekintetében. A legkevésbé azzal az állítással értettek egyet, hogy a költségcsökkentés, valamint a származási országuk piacának és kultúrájának ismerete szempontjából előnyös számukra a foglalkoztatásuk. (5. ábra).

**Ábra 5: A harmadik országbeli munkavállalók alkalmazásának előnyei (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



N=49

Forrás: Saját számítások a felmérés alapján

Az eredmények alapján világos, hogy a vállalatok számára a külföldi munkavállalók alkalmazásának fő indoka a hazai munkaerő hiánya és a megfelelő kompetenciákkal rendelkező munkavállalók megszerzése. A válaszadók többsége nem ért egyet azzal, hogy a sokszínűség, a kulturális és piaci ismeretek vagy a költségcsökkentés lenne a fő motiváció nem uniós munkavállalók alkalmazására (6. ábra)."

**Ábra 6: A harmadik országbeli munkavállalók foglalkoztatásának okai (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**

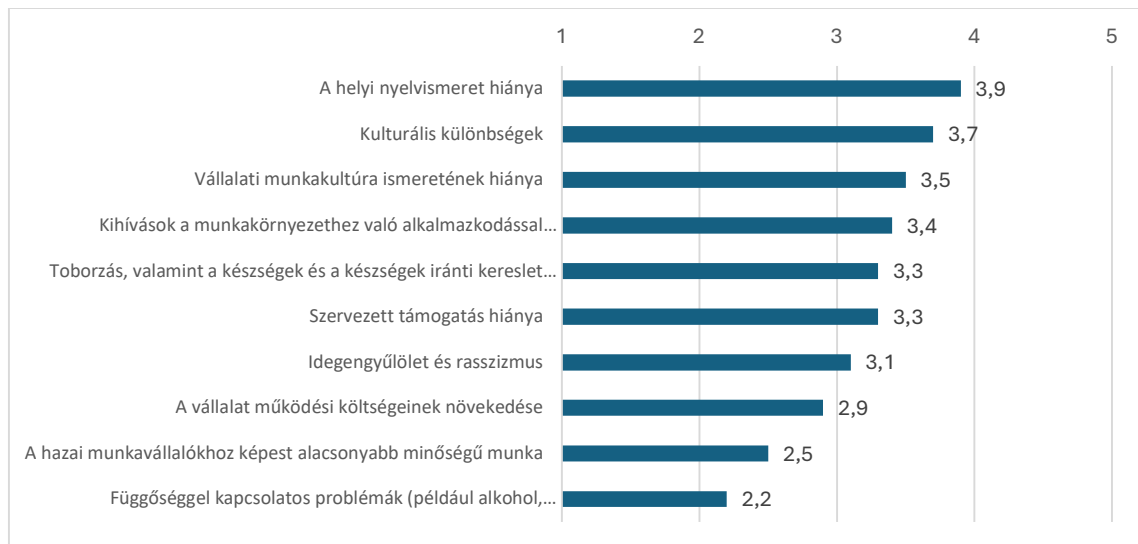


N=19

Forrás: Saját számítások a felmérés alapján

A válaszadók a helyi nyelv ismeretének hiányát és a kulturális különbségeket tartják a harmadik országbeli munkavállalók alkalmazásával kapcsolatos legnagyobb lehetséges problémának (7. ábra).

**Ábra 7: A harmadik országbeli munkavállalók alkalmazásával kapcsolatos lehetséges problémák (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



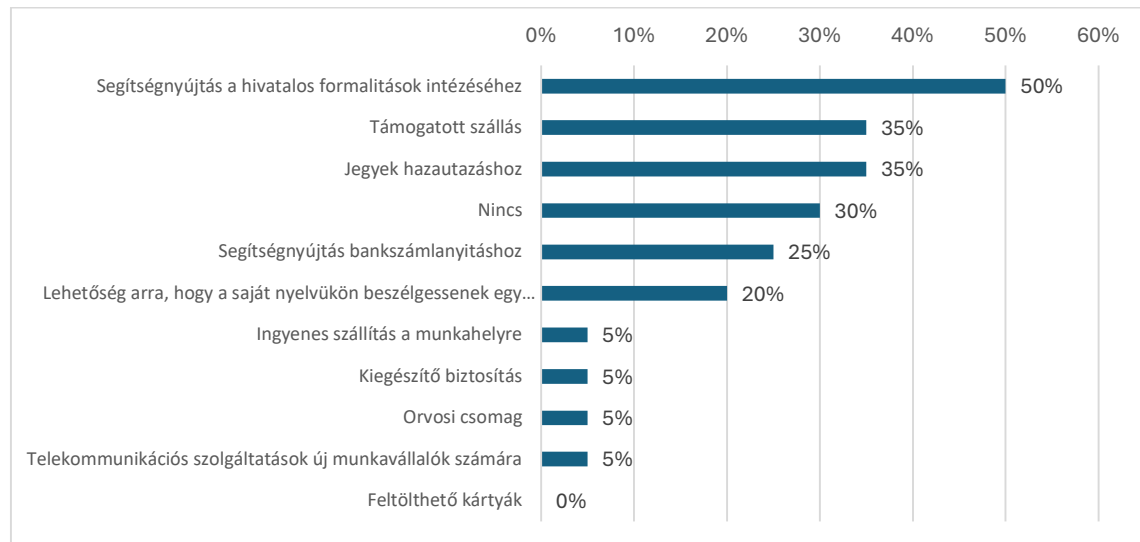
N=76

Forrás: Saját számítások a felmérés alapján

A harmadik országbeli munkavállalóknak kínált kényelmi szolgáltatások tekintetében a válaszadók 50%-a nyújt segítséget a hivatalos formalitások intézésében, 35%-uk támogatott szállást és jegyeket biztosít a hazautazáshoz, míg 25%-uk segít a bankszámlanyitásban (8.

ábra). Ezenkívül a válaszadók 30%-a nem kínál semmilyen kényelmi szolgáltatást kifejezetten a harmadik országbeli munkavállalóknak.

**Ábra 8: A harmadik országbeli munkavállalóknak kínált kényelmi szolgáltatások**

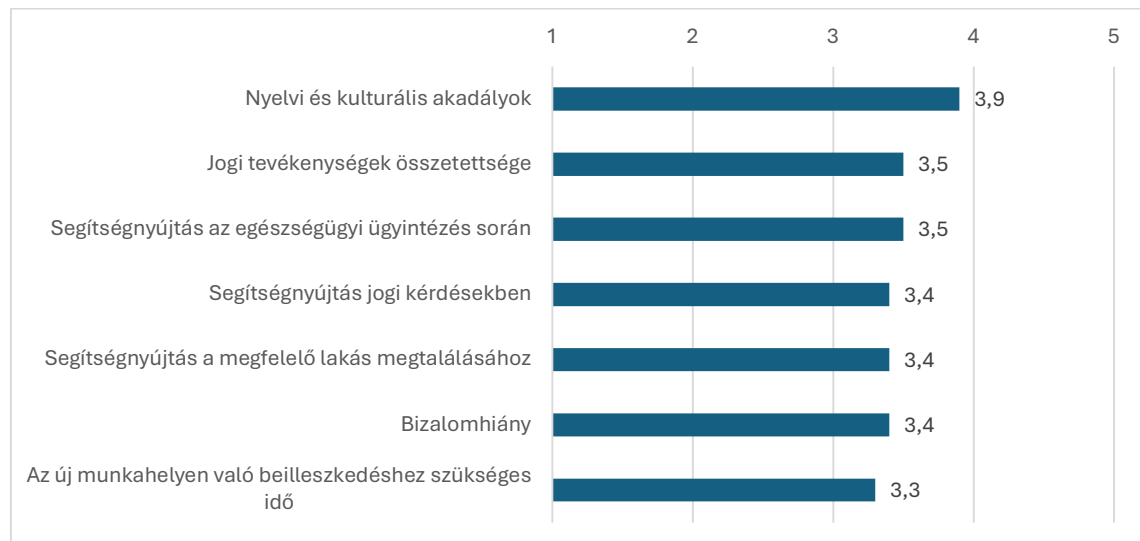


N=20

Forrás: Saját számítások a felmérés alapján

A felmérés eredményei azt mutatják, hogy a nyelvi és kulturális akadályok, a legnagyobb akadálya a harmadik országbeli munkavállalók foglalkoztatásának (9. ábra). Továbbá a jogi eljárások összetettsége, az egészségügyi ügyintézésben való eligazodás, a megfelelő szállás megtalálása, valamint a bizalom hiánya is jelentős kihívást jelent. Az új munkahelyen való beilleszkedéshez szükséges időt valamivel kevésbé jelentős akadálynak tartják.

**Ábra 9: A harmadik országbeli munkavállalók foglalkoztatásának akadályai (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



N=76

Forrás: Saját számítások a felmérés alapján

A jogi tevékenységekkel kapcsolatos formális akadályok széles skálájával kapcsolatban nagy az egyetértés (10. ábra). A cégek azonban (átlagosan) nem érzékelnek semmilyen következményt emiatt (11. ábra).

**Ábra 10: A jogi tevékenységekkel kapcsolatos formális akadályok (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



N=39

Forrás: Saját számítások a felmérés alapján

**Ábra 11: A vállalatok által a harmadik országbeli munkavállalók alkalmazása során tapasztalt akadályok következményei (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



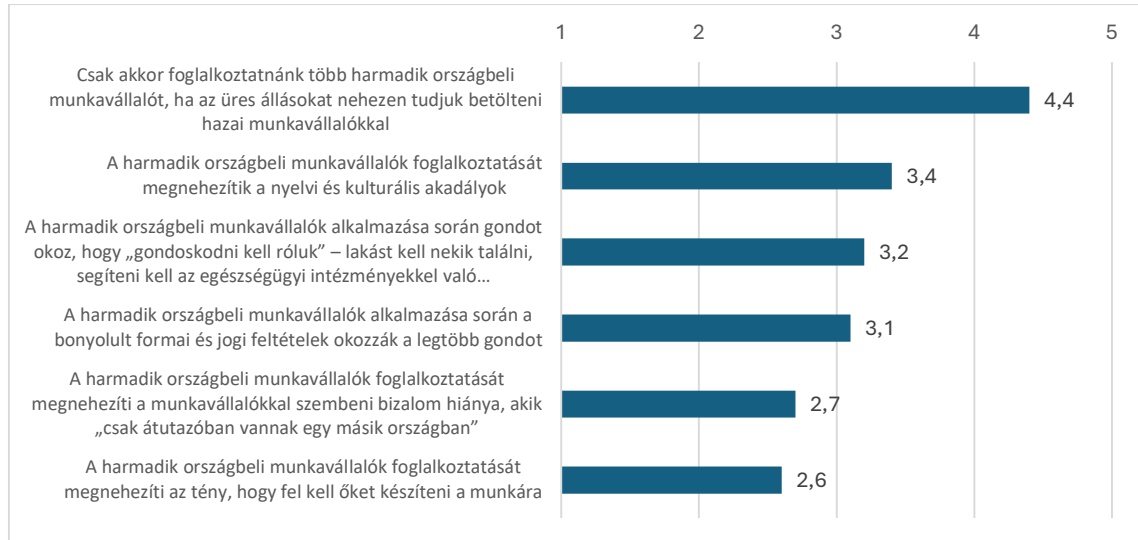
N=71

Forrás: Saját számítások a felmérés alapján

A legtöbb válaszadó nagymértékben egyetért azzal az állítással, hogy a harmadik országbeli állampolgárok foglalkoztatása csak akkor növekszik, ha az üres álláshelyeket nehéz hazai állampolgárokkal betölteni. Azzal is egyetértenek, hogy a harmadik országbeli munkavállalók

foglalkoztatását a nyelvi és kulturális akadályok akadályozzák, és hogy gondoskodniuk kell róluk. (12. ábra).

**Ábra 12: A harmadik országbeli munkavállalók foglalkoztatására vonatkozó állítások értékelése (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



N=20

Forrás: Saját számítások a felmérés alapján

Általánosságban véve a harmadik országbeli munkavállalók alkalmazásával kapcsolatos tapasztalatok többnyire pozitívak voltak, és nyelvtudásuk elegendőnek bizonyult a jó munkavégzéshez (13. ábra). A vállalatok többsége nem ért egyet azzal az állítással, hogy a harmadik országbeli munkavállalók nehezen integrálhatók lennének a többi alkalmazott közé.

**Ábra 13: Tapasztalatok a harmadik országbeli munkavállalók alkalmazásával kapcsolatban (1 = egyáltalán nem ért egyet, 5 = teljesen egyetért)**



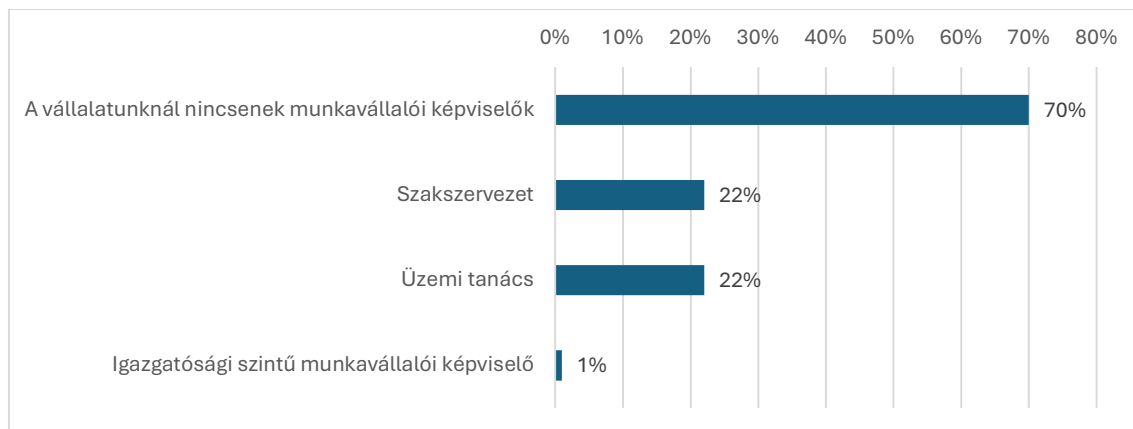
N=20

Forrás: Saját számítások a felmérés alapján

## 2.7. A munkavállalók képvisele a vállalatoknál

A megkérdezett vállalatok arról számoltak be, hogy a munkavállalók milyen formában képviseltetik magukat a vállalatukban, ahol egy vagy több formát is választhattak. A válaszok alapján a legtöbb vállalat (70%) nem rendelkezik semmilyen munkavállalói képviselettel. Ugyanakkor számos vállalatnál a szakszervezet (22%) és az üzemi tanács (22%) képviseli a munkavállalókat (14. ábra).

Ábra 14: A munkavállalók képvisele a vállalatoknál

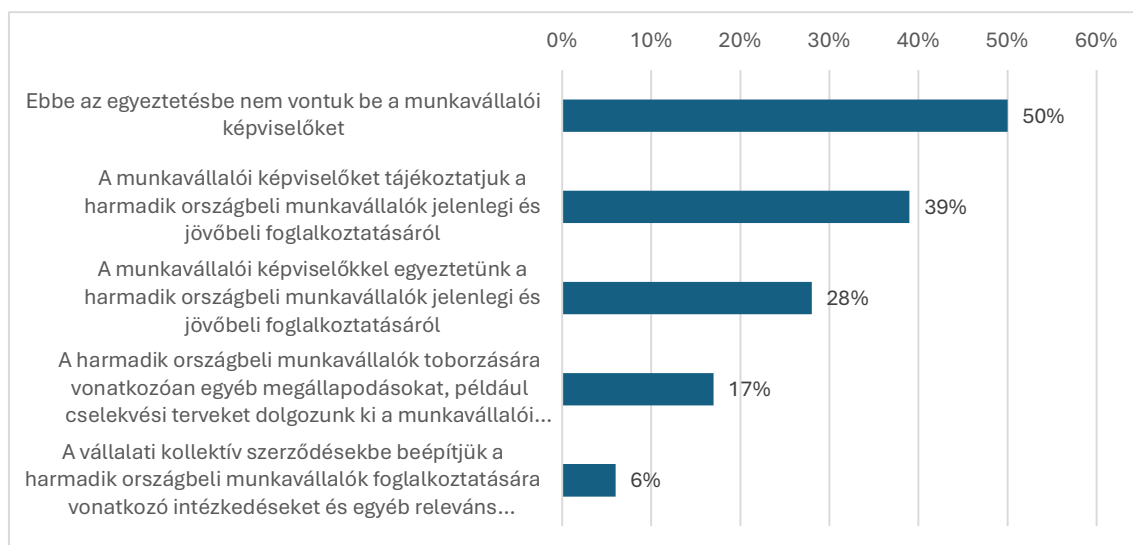


N=79

Forrás: Saját számítások a felmérés alapján

A válaszadók több mint fele, akiknek vállalatukban van valamilyen formában munkavállalói képviselet, nem vonta be a munkavállalói képviselőket a harmadik országbeli munkavállalók által jelentett kihívások megvitatásába (15. ábra). Hasonló tendencia figyelhető meg a jövőbeli terveik tekintetében is (16. ábra).

Ábra 15: A harmadik országbeli munkavállalókkal kapcsolatos kihívások kezelése

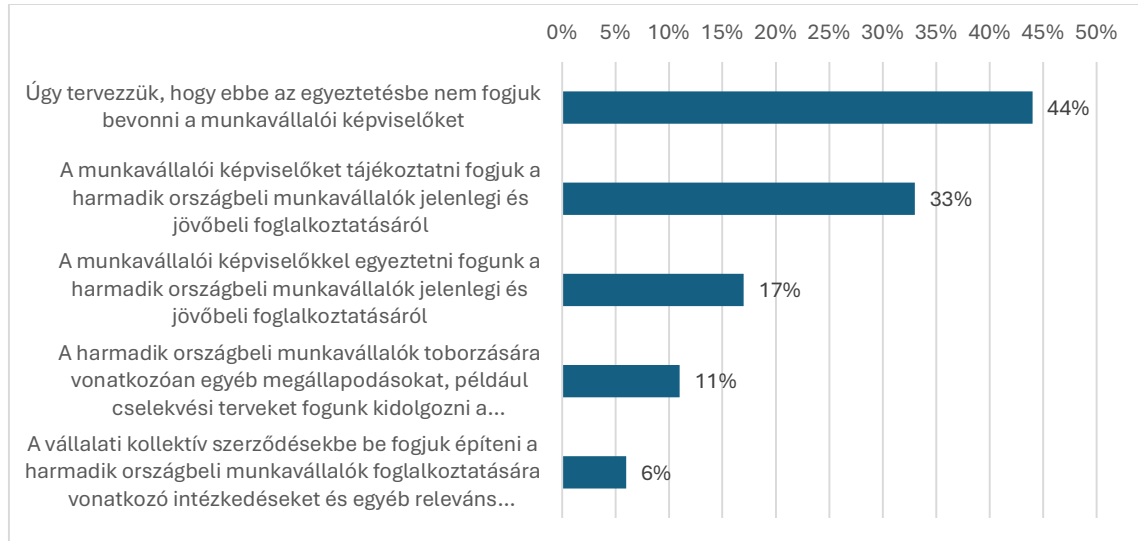


N=18

Forrás: Saját számítások a felmérés alapján



**Ábra 16: A harmadik országbeli munkavállalókkal kapcsolatos kihívások kezelésére vonatkozó tervek**



N=18

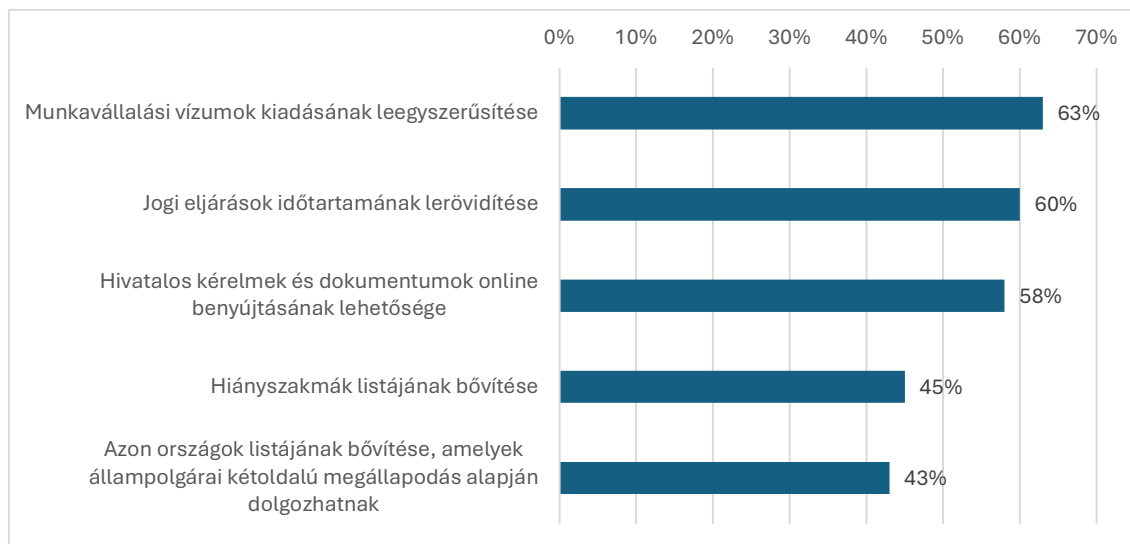
Forrás: Saját számítások a felmérés alapján

Ezen túlmenően a válaszadók több mint fele (57%) nem tud a szociális partnerek által a foglalkoztatásról és a harmadik országbeli munkavállalókkal kapcsolatos kihívásokról ágazati és nemzeti szinten folytatott megbeszélésekről. A válaszadók valamivel több mint egynegyede, 35%-a ismeri a megbeszéléseket, de nem tudja, miről szólnak.

## **2.8. Hiányosságok a harmadik országbeli állampolgárok foglalkoztatásának támogatásában**

A válaszadók szerint a harmadik országbeli állampolgárok foglalkoztatásának megkönnyítése érdekében prioritásként kell kezelni a jogi eljárások időtartamának lerövidítését, a munkavállalási vízumok kiadásának leegyszerűsítését, valamint a hivatalos kérelmek és dokumentumok online benyújtásának lehetőségét (17. ábra).

**Ábra 17: A harmadik országbeli munkavállalók foglalkoztatásának megkönnyítésére javasolt szabályozási változások**



N=67

Forrás: Saját számítások a felmérés alapján

A felmérésből kiderült, hogy sok válaszadónak nincs munkáltatói érdekképviseleti szerve, míg néhányan szakszervezetet vagy üzemi tanácsot működtetnek. Jellemzően a kkv-knak nincs képviseleti szervük, míg a nagyvállalatoknak általában egy vagy kettő. Néhány válaszadó tájékoztatja a munkavállalók képviselőit a harmadik országbeli munkavállalók foglalkoztatásáról. Mások konzultálnak a munkavállalók képviselőivel, vagy ezeket a kérdéseket a vállalati kollektív szerződésekbe foglalják bele. Néhányan egyéb megállapodásokat, például cselekvési terveket is kötöttek. Jelentős részük nem vonja be a munkavállalói képviselőket ezekbe a kihívásokba. Az e kihívások kezelésére vonatkozó jövőbeli tervek várhatóan nem változnak jelentősen. Több válaszadó tud az ágazati és nemzeti szintű megbeszélésekről, de nem biztosak azok tartalmában. Néhány válaszadó tisztában van a tartalommal, és csak egy válaszadó vesz részt aktívan. A válaszadók több mint fele nem tud az ilyen megbeszélésekről. A vállalat mérete nem befolyásolja az ilyen megbeszélések ismertségét. Sok válaszadó említi a munkaerő-piaci integrációt szolgáló szakmai vagy munkahelyi képzést. Mások a készségek felmérését említik. A legtöbb válaszadó nem tartja relevánsnak a túlképzést. A szociális készségek fejlesztésére irányuló intézkedések közé tartozik a munkahelyi nyelvi képzés és egyéb nyelvtanfolyamok. Egyesek számítógépes képzést kínálnak, míg mások a kommunikációs készségekre összpontosítanak. A válaszadók fele az önfejlesztést hangsúlyozza. Néhányan a munkaerő-piaci ismeretek nyújtására támaszkodnak, míg mások tanácsadást, mentorálást és coachingot alkalmaznak. Gyakori a karrier-tanácsadás és a honlapon való tájékoztatás is. Egyesek a nyomtatott anyagokat, valamint a számítógépes programokat és alkalmazásokat részesítik előnyben. Jelentős számban a diszkrimináció megelőzésére összpontosítanak. Sokan felhívják a figyelmet a munkahelyi sokszínűségekre, különösen a nagyvállalatoknál. Néhányan polgári/társadalmi/kulturális/kulturális orientációs tanfolyamokat kínálnak a befogadás érdekében.



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Grant agreement no. 101102367

**RECRUIT4TOMORROW**

**Encouraging employment of third-country nationals  
through social dialogue**

**Deliverable D2.1**

**National Analysis Report for Slovakia**

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## **Executive summary**

The deliverable, National Analysis Report for Slovakia, presents the findings from the survey amongst Slovakian employers regarding the employment of third-country nationals in Slovakia which was executed as part of the WP2 in the project. In the scope of WP2, we analysed and researched the challenges that labour market stakeholders are facing when dealing with the matching of labour supply and demand by employment of third-country nationals.

The presented deliverable is a detailed report from the national survey results in Slovakia which will be a basis and a starting point for further analysis and social dialogue on all levels in WP3 where the consortia partners will prepare measures to address the labour market needs and recommendations for policymakers. The first part of the deliverable presents the national survey report in English and the second part (Chapter 2) presents the Slovak translation.



## 1. Recruit4Tomorrow - Survey Report on Slovakia

The survey report presents insights based on descriptive statistics from a sample of Slovak companies. Conducted between April 22 and June 30, 2024, the survey received complete or partial responses from 148 companies regarding the employment of third-country nationals. The report begins with a brief summary of the sample characteristics, the current state of employing foreign and third-country workers, their origins, and their wages. The second part delves into the advantages and barriers of employing third-country workers, their representation, and the gaps in support for their employment.

### 1.1. Sample characteristics

The characteristics of the companies included in the sample are shown in Table 1.

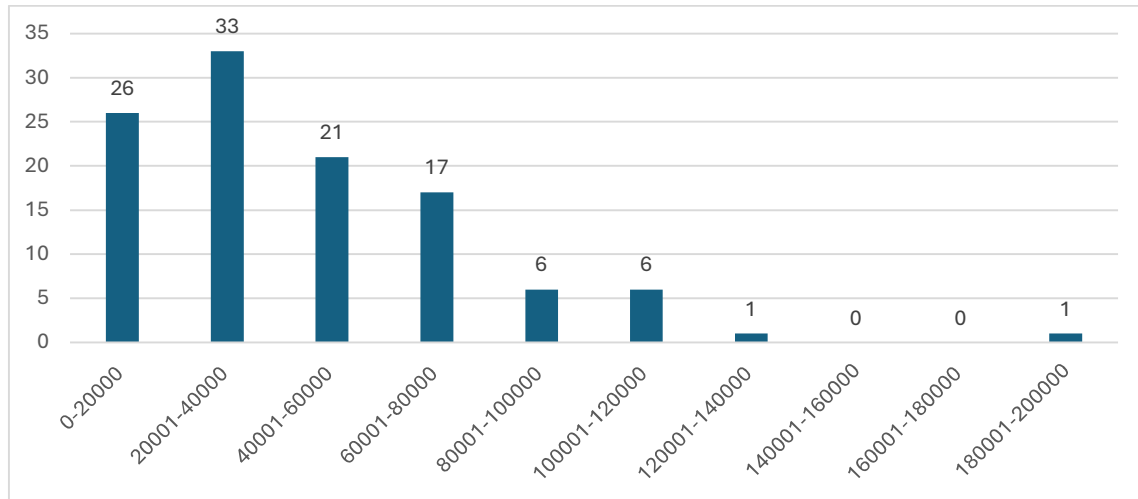
**Table 1: Company size, classification and industry**

		<b>Frequency</b>	<b>Percent</b>
<b>Size (number of workers) (N = 146)</b>	Less than 10	10	7%
	11-50	42	29%
	51-250	46	31%
	251-500	22	15%
	More than 500	26	18%
<b>Company classification (N = 146)</b>	Family-owned company	32	22%
	Domestic private company	64	44%
	Domestic public company	10	7%
	MNE subsidiary	37	25%
	Other	3	2%
<b>Industry (N = 146)</b>	Construction	15	10%
	Hospitality and tourism	14	10%
	Healthcare	3	2%
	Manufacturing	32	22%
	Oil and gas sector	5	3%
	Automotive sector	9	6%
	ICT (IT) sector	15	10%
	Trade	13	9%
Other services	40	27%	

Source: Own calculations based on the survey

In 2023, the average value added per worker among companies surveyed was EUR 45,193.5<sup>1</sup> per year. The distribution of value added per worker among the surveyed companies shows a broad spectrum with a concentration in the middle ranges. Most of the respondents fall into the EUR 20,001 to EUR 40,000 range (Figure 1).

**Figure 1: Value added per worker (per year, in EUR) in 2023**



N=111

Source: Own calculations based on the survey

Additionally, the average gross wage reported by the companies surveyed is EUR 1,857<sup>2,3</sup> per month. The distribution of average gross wages among the surveyed companies shows that three-quarters (78 %) of companies offered an average gross salary of up to EUR 2,300 per month.

The survey included a wide range of respondents from different positions within their respective organisations (Table 2). The characteristics of the respondents show a significant representation from HR departments and management, in line with the focus of the survey. 57% of the respondents were male.

**Table 2: Respondent's position in the company**

	Frequency	Percent
CEO / Director / Member of the management board	34	23%
Head of HR	38	26%
HR professional	30	21%
Head of Legal Department	13	9%
Legal professional	10	7%
Other	21	14%

N=107

Source: Own calculations based on the survey

<sup>1</sup> Std. deviation: 32.220,98, min: 10,000, max: 200,000

<sup>2</sup> Std. deviation: 666,3, min: 100, max: 3,520.

<sup>3</sup> The average gross wage in Slovakia in 2023 was EUR 1,430.

In addition, more than 90% of all respondents have at least 5 years of work experience, with most having more than 15 years in their respective fields (Table 3).

**Table 3: Duration of working experience of respondents**

	<b>Frequency</b>	<b>Percent</b>
Less than 5 years	10	7%
5 - 15 years	34	23%
16 - 25 years	50	34%
26 - 35 years	26	18%
More than 35 years	26	18%

N=146

Source: Own calculations based on the survey

## 1.2. Employment of foreign workers – current situation

The majority, namely, 77% of the companies surveyed reported that they currently employ foreign workers (Table 4). Almost all respondents who employ foreigners (93.7%) reported that they employ also non-EU foreign workers.

**Table 4: Employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
Yes	113	77%
No	33	23%

N=146

Source: Own calculations based on the survey

For those companies that do not currently employ foreign workers (Table 5), their future plans for employing foreign workers were also examined. Of these respondents, 64 % (24 respondents) plan to employ foreign workers in the future. Specifically, 13 of these 24 respondents indicated that they plan to employ third-country workers. Conversely, 32% (13 respondents) do not plan to employ foreign workers in the future.

**Table 5: Strategy for future employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
We plan to employ foreign workers in the future	11	27%
We plan to employ third-country workers in the future	13	32%
We do not plan to employ any foreign workers in the future	13	32%
Other	4	9%

N=41

Source: Own calculations based on the survey

### 1.3. Employment of third-country (non-EU) workers

Looking at the number of non-EU workers currently employed in the companies, a quarter of the respondents reported that less than 5 % of their workforce consisted of non-EU workers, same reported between 6 % and 10 %. Notably, 18 % of companies have between 11% and 15% non-EU nationals in their workforce (Table 6). These companies operate in manufacturing, ICT and other services.

**Table 6: Distribution of third-country workers in the workforce**

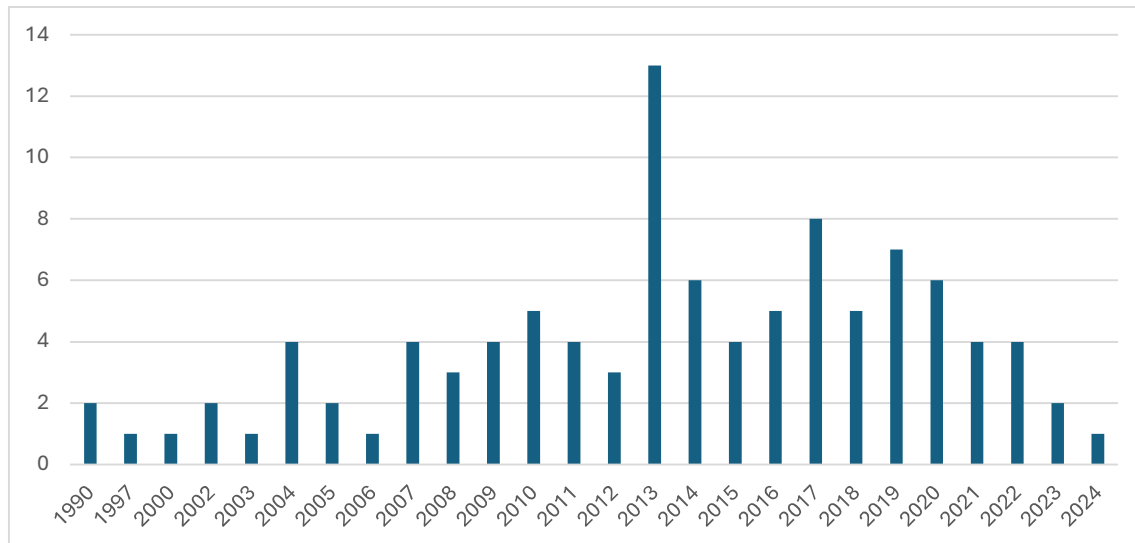
	Frequency	Percent
Less than 5 % of the total workforce	26	25%
6-10 %	26	25%
11-15 %	19	18%
16-20 %	14	14%
More than 20 %	16	16%
Don't know exactly	2	2%

N=103

Source: Own calculations based on the survey

Figure 2 shows that while some companies have been employing third-country nationals since 1990, there has been a significant and noticeable increase in this practice in 2013<sup>4</sup> and 2017.

**Figure 2: Number of companies reporting start of employment for third-country nationals by year**



N=102

Source: Own calculations based on the survey

<sup>4</sup> The spike in employment of third-country workers in Slovakia in 2013 can be explained by two facts: 1) in 2013 several measures against the illegal employment of foreigners entered into force in Slovakia and 2) the Shared Services Centres started to operate in Slovakia with support of the AmCham which enabled a wider discussion about the employment of the workers from third countries. Most of these employees came from Ukraine, South Korea and China.

The results suggest that while the third-country workers in the surveyed companies come from a variety of educational backgrounds, there is a significant representation of those with secondary education. 44 % of the respondents believe that the educational structure of third-country workers is comparable to that of the general workforce in the company. However, 33 % of respondents think that third-country workers have a lower average level of education (Table 7). It is also worth noting that less than a third of third-country workers are women. The age structure of third-country workers in the companies surveyed shows that the majority are between 31 and 40 years old.

**Table 7: Company vs. third-country worker educational levels**

	<b>Frequency</b>	<b>Percent</b>
Comparable	42	44%
On average, third-country workers have lower education.	31	33%
On average, third-country workers have higher education.	11	12%
Difficult to answer	9	9%

N=95

Source: Own calculations based on the survey

More than 40 % of non-EU workers are employed for elementary work, slightly less for professional and technical and service work, followed by production work (Table 8).

**Table 8: Job types of third-country workers**

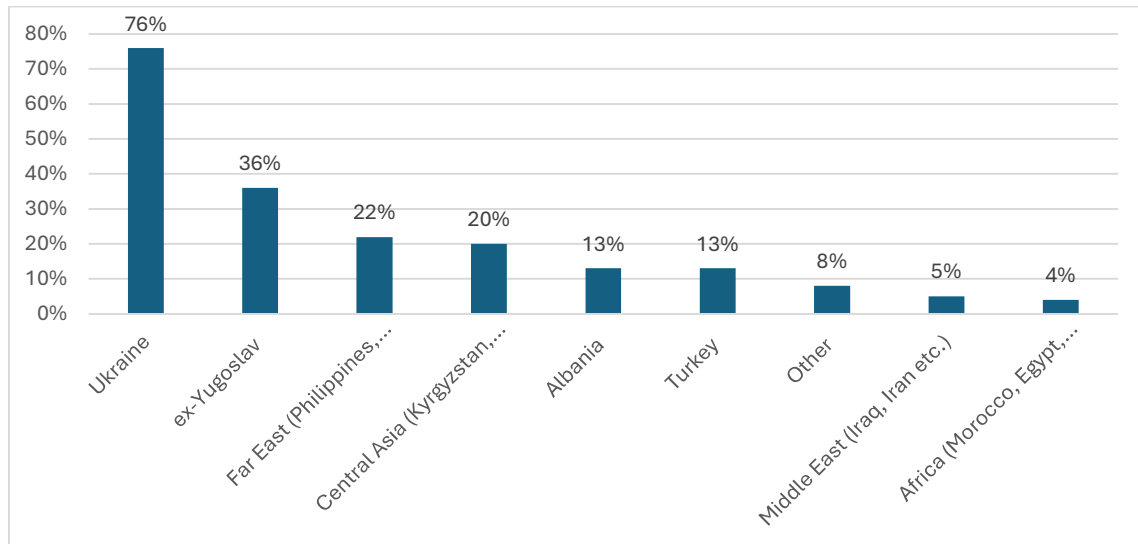
	<b>Frequency</b>	<b>Percent</b>
Service work (sales, personal care, protective services, personal services, etc)	23	24%
Professional and technical work (healthcare services, legal and other professional services, science and engineering professional services, etc)	38	40%
Production work	34	36%
Elementary work (cleaning services, agriculture, fishing and forestry services, food preparation assistance, etc.)	40	42%
Managerial work	14	15%
Other	15	16%

Source: Own calculations based on the survey

### 1.4. The origin of third-country workers

The survey results indicate that third-country workers predominantly come from Ukraine. Additionally, a significant number of third-country workers are from countries of former Yugoslavia such as Bosnia and Herzegovina, Serbia, Montenegro and North Macedonia, as well as from the Far East (Figure 3).

**Figure 3: The origin of third-country workers**

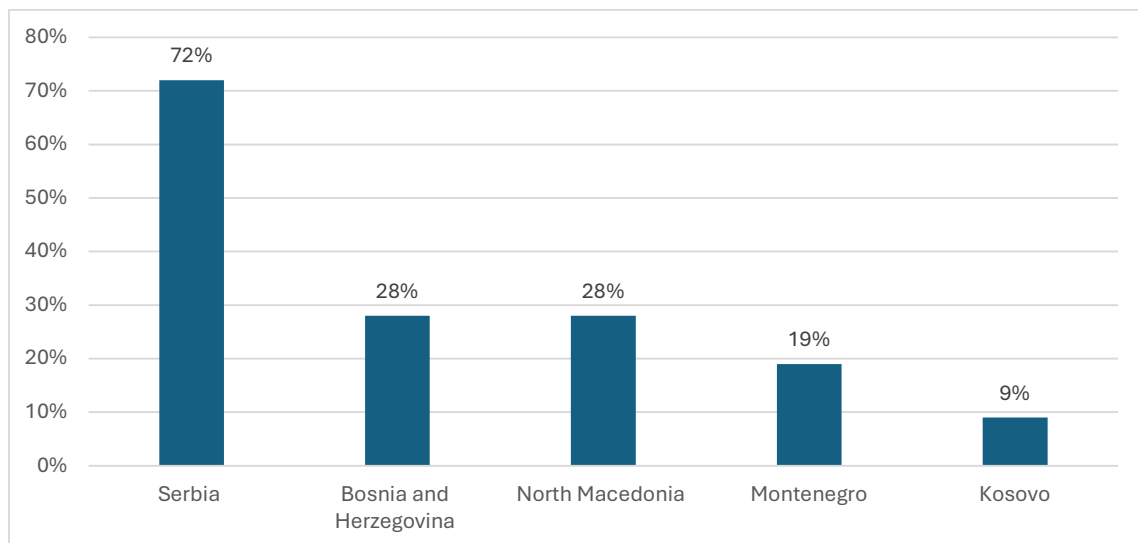


N=96

Source: Own calculations based on the survey

When asked which ex-Yugoslav countries the workers originate from, the most common answer was Serbia (Figure 4).

**Figure 4: Origin of third-country workers from non-EU former Yugoslav Countries**



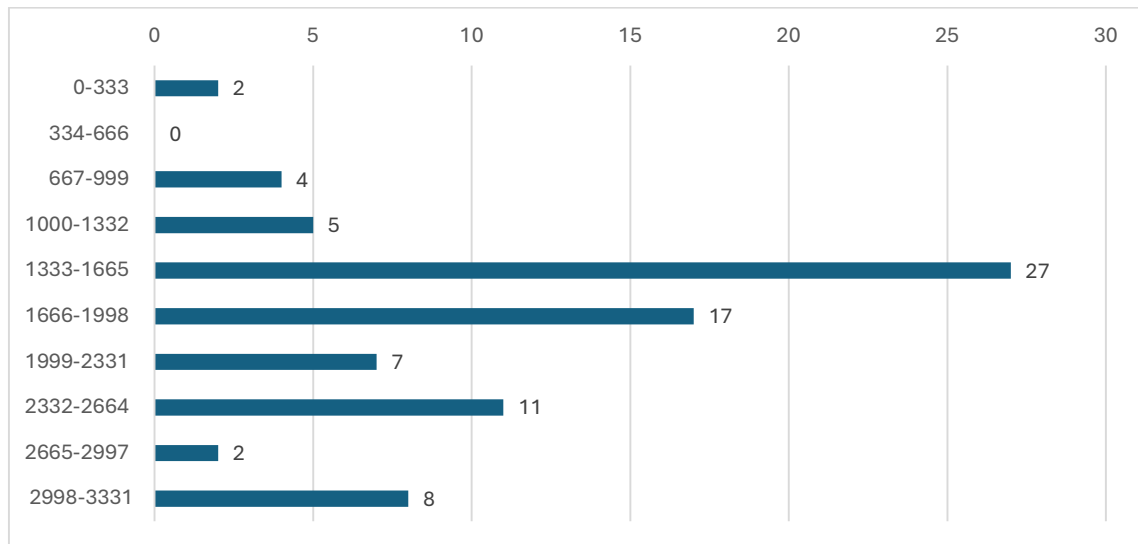
N=32

Source: Own calculations based on the survey

## 1.5. Wages of third-country workers

The average gross wage of third-country workers in the surveyed companies is EUR 1.857,4.<sup>5</sup> The average gross wage for third-country workers is lower than the overall company average. Figure 5 illustrates the distribution of average gross wages (per month, in EUR) paid to third-country workers in the surveyed companies.

**Figure 5: Distribution of average gross wages paid to third-country workers (per month, in EUR)**



N=83

Source: Own calculations based on the survey

Despite the numerical difference in average wages, the majority of companies consider the wages of third-country workers to be comparable to those of their other employees (Table 9).

**Table 9: Qualitatively comparing average gross wages of third-country workers to other workers in the same company**

	Frequency	Percent
Lower	18	20%
Comparable	59	66%
Higher	11	12%
I don't know	1	1%

N=57

Source: Own calculations based on the survey

All the companies surveyed claimed that they did not receive any subsidies for employing third-country workers that other workers were not entitled to.

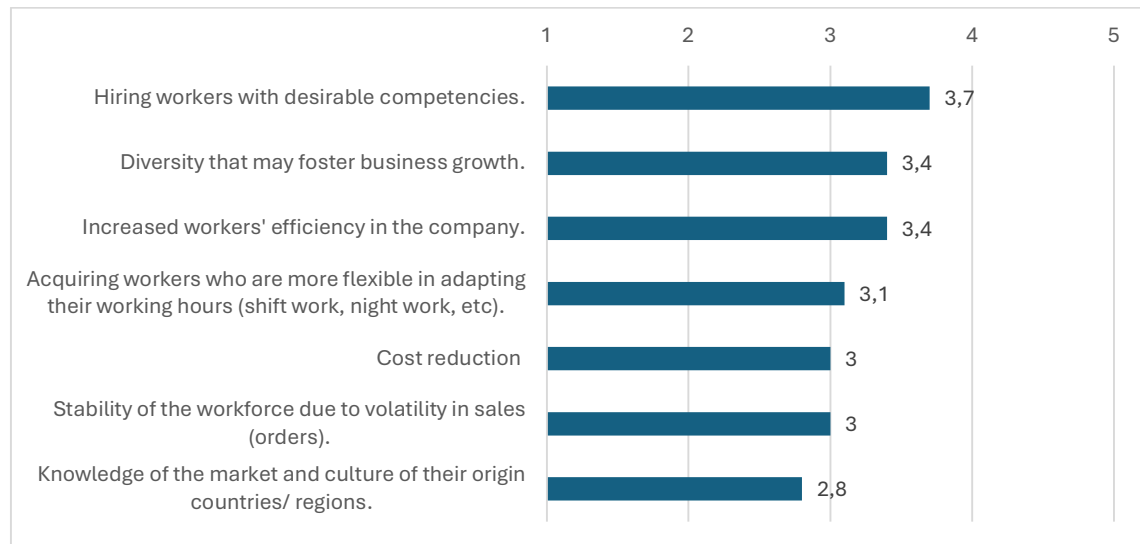
<sup>5</sup> Std. deviation: 657,52, min: 100, max: 3,331

## 1.6. Advantages and barriers in employing third-country workers

The main advantages that companies see in employing third-country nationals are the recruitment of workers with desirable competencies, the diversity that can help the company grow and increased workers' efficiency in the company.

The respondents don't perceive the stability of the workforce due to fluctuations in sales (orders) and knowledge of the market and culture of their origin countries/regions as benefits of employing third-country workers (Figure 6).

**Figure 6: Advantages of employing third-country workers (1 = fully disagree, 5 = fully agree)**



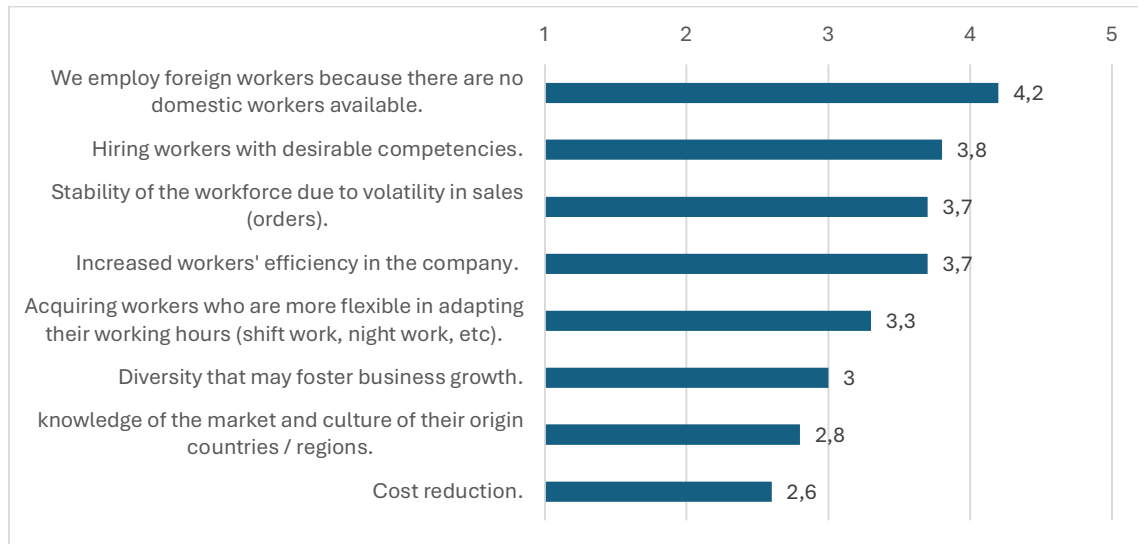
N=26

Source: Own calculations based on the survey

It is clear that one of the main reasons why companies decide to employ foreign workers is because of a lack of domestic workers and to obtain workers with the appropriate competencies (Figure 7).



**Figure 7: Reasons for employing third-country workers (1 = fully disagree, 5 = fully agree)**

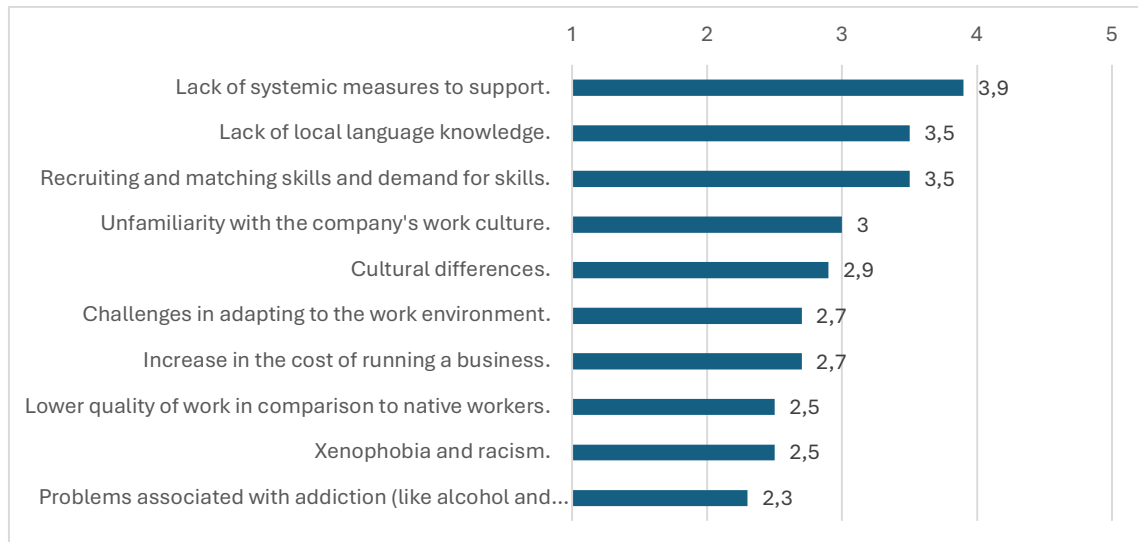


N=87

Source: Own calculations based on the survey

Respondents consider a lack of systemic measures to support and a lack of local language knowledge to be the biggest potential problems associated with employing third-country workers (Figure 8).

**Figure 8: Potential problems related to employing third-country workers (1 = fully disagree, 5 = fully agree)**

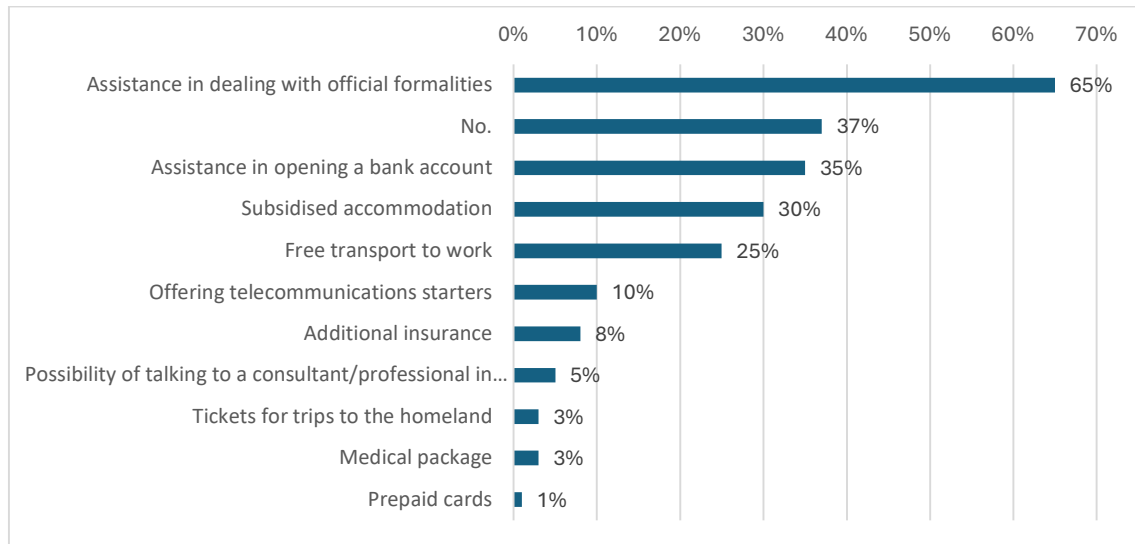


N=117

Source: Own calculations based on the survey

Regarding the amenities, offered to third-country workers, 65 % of the respondents offer third-country workers help with official formalities, 35 % offer third-country workers help with opening a bank account, and 30 % offer third-country workers subsidised accommodation (Figure 9).

**Figure 9: Amenities offered to third-country workers**

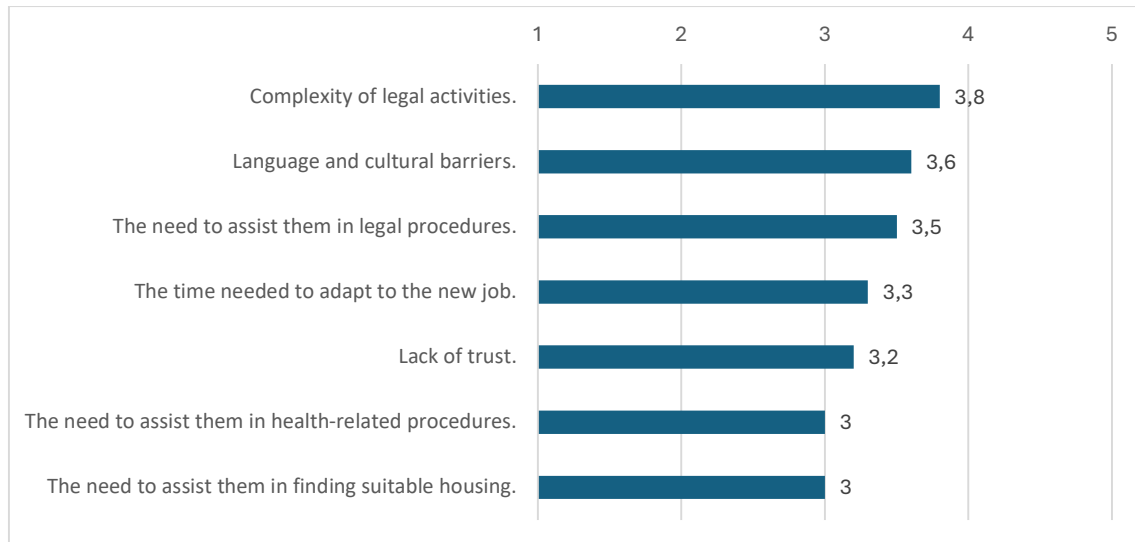


N=91

Source: Own calculations based on the survey

The survey results indicate that legal complexities, language and cultural barriers and the need for assistance with legal procedures are the most significant barriers to employing third-country workers (Figure 10). The need to find suitable accommodation and navigate health-related procedures are less significant barriers for Slovak respondents.

**Figure 10: Barriers in employing third-country workers (1 = fully disagree, 5 = fully agree)**

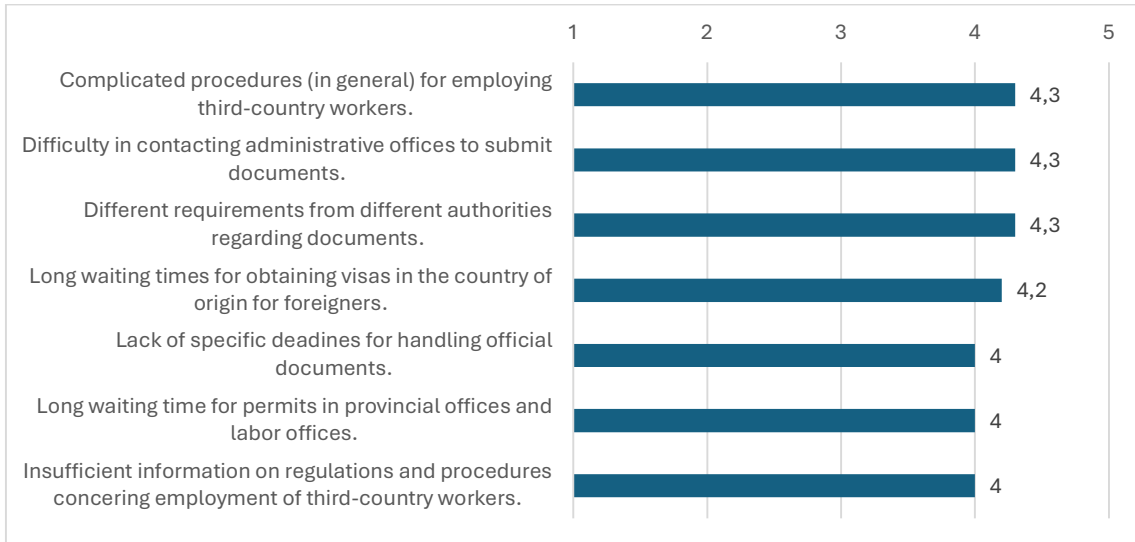


N=120

Source: Own calculations based on the survey

There is a high agreement about the wide range of formal barriers related to legal activities – like complicated procedures (in general) for employing third-country workers, difficulty in contacting administrative officers and different requirements (Figure 11). Consequently, companies are unable to employ workers on time (Figure 12).

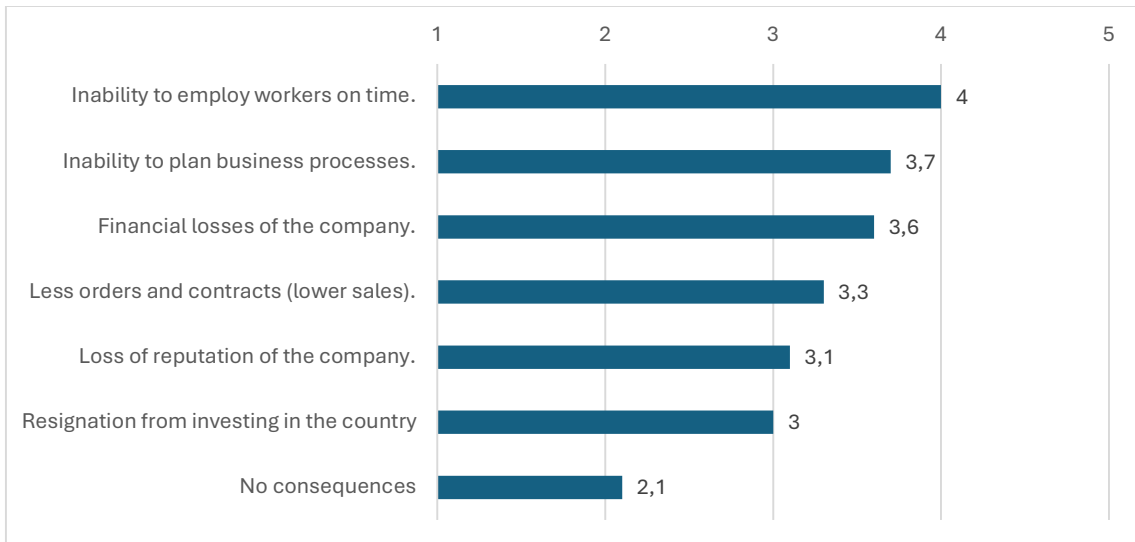
**Figure 11: Formal barriers that are related to legal activities (1 = fully disagree, 5 = fully agree)**



N=72

Source: Own calculations based on the survey

**Figure 12: Consequences of obstacles that companies face when employing third-country workers (1 = fully disagree, 5 = fully agree)**



N=113

Source: Own calculations based on the survey

The most problematic aspect of employing third-country workers is the complicated formal and legal conditions (Figure 13).

**Figure 13: Evaluation of statements regarding the employment of third-country workers (1 = fully disagree, 5 = fully agree)**

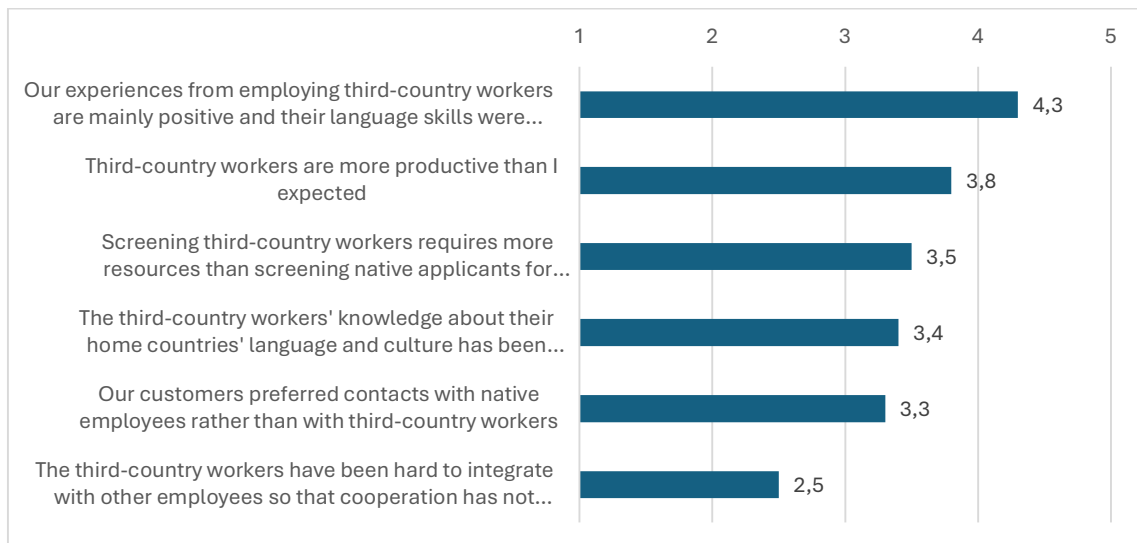


N=91

Source: Own calculations based on the survey

In general, however, the experience of employing third-country workers is mainly positive and their language skills have been sufficient for them to do a good job (Figure 14). Companies generally disagree that third-country workers have been difficult to integrate with other employees.

**Figure 14: Experiences with employing third-country employees (1 = fully disagree, 5 = fully agree)**



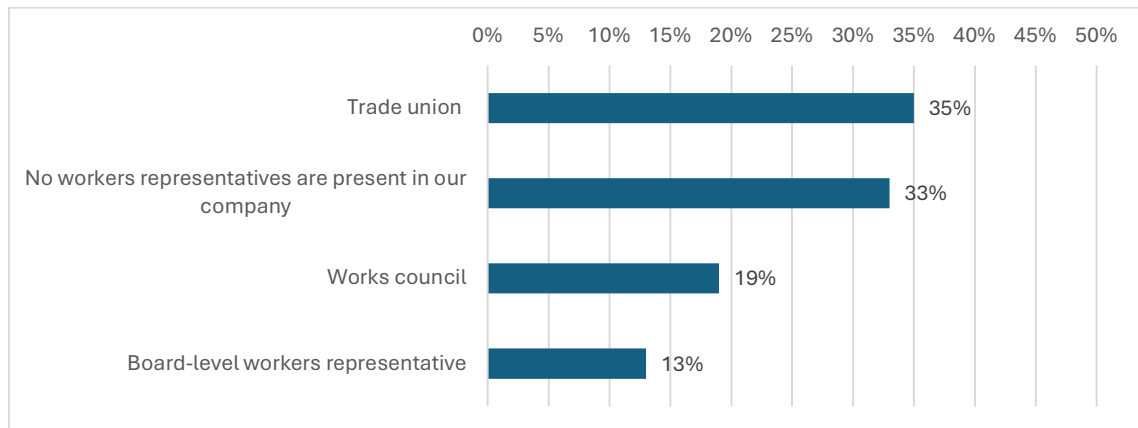
N=90

Source: Own calculations based on the survey

## 1.7. Workers' representation in companies

The companies surveyed first had to choose the form of workers' representation in their company (they could choose one or more). The most common form of workers' representation is the trade union. However, one-third of companies in the sample do not have any form of workers' representation (Figure 15).

**Figure 15: Workers representation in companies**

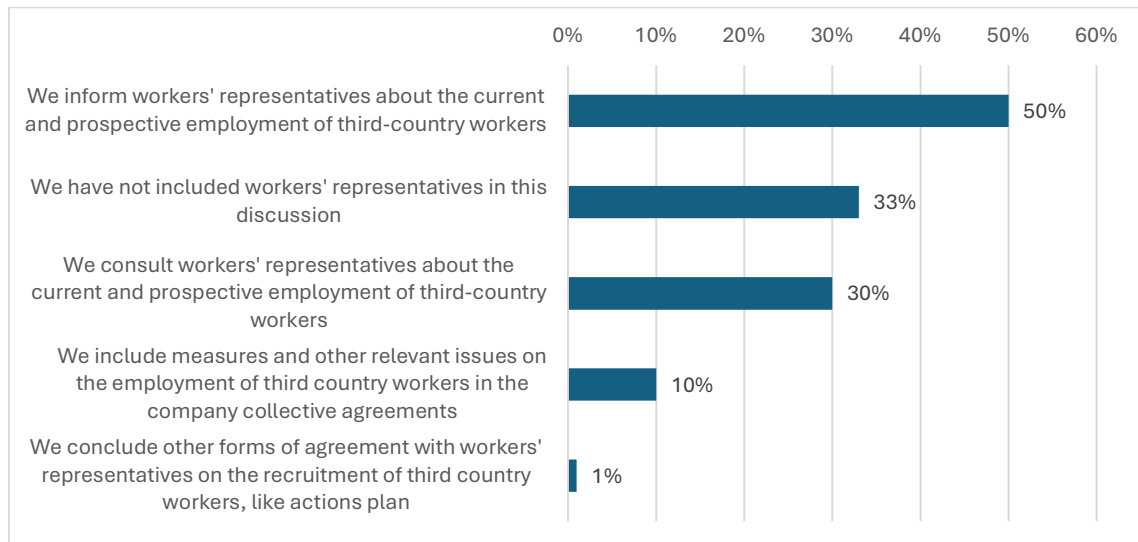


N=118

Source: Own calculations based on the survey

More than half of the respondents who have some form of workers' representation in their company, inform workers' representatives about the current and prospective employment of third-country workers (Figure 16). The situation is very similar when it comes to their future plans (Figure 17).

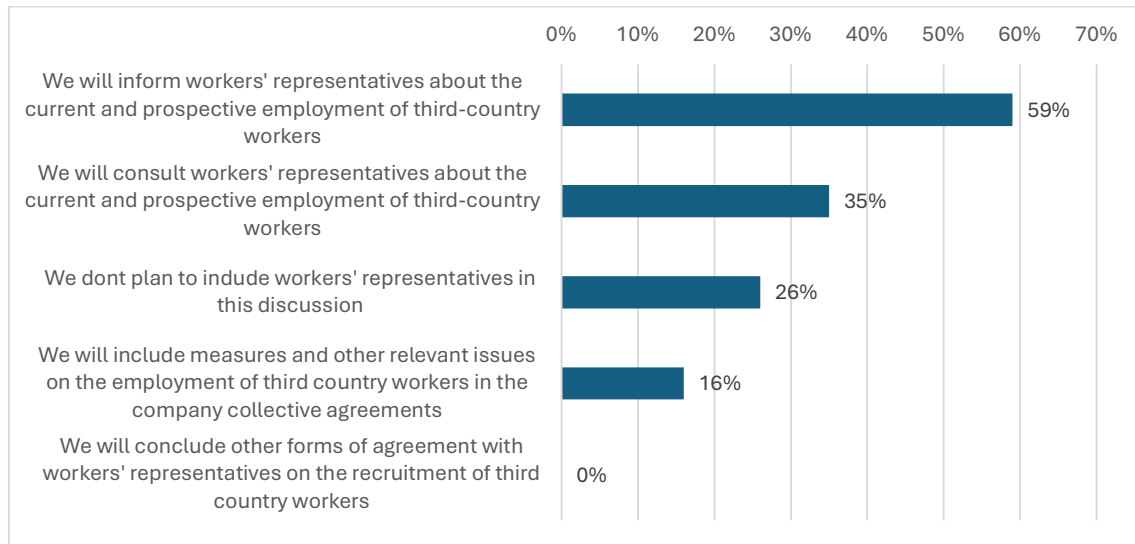
**Figure 16: Dealing with the challenges related to third-country workers**



N=86

Source: Own calculations based on the survey

**Figure 17: Plans to deal with the challenges related to third-country workers**



N=86

Source: Own calculations based on the survey

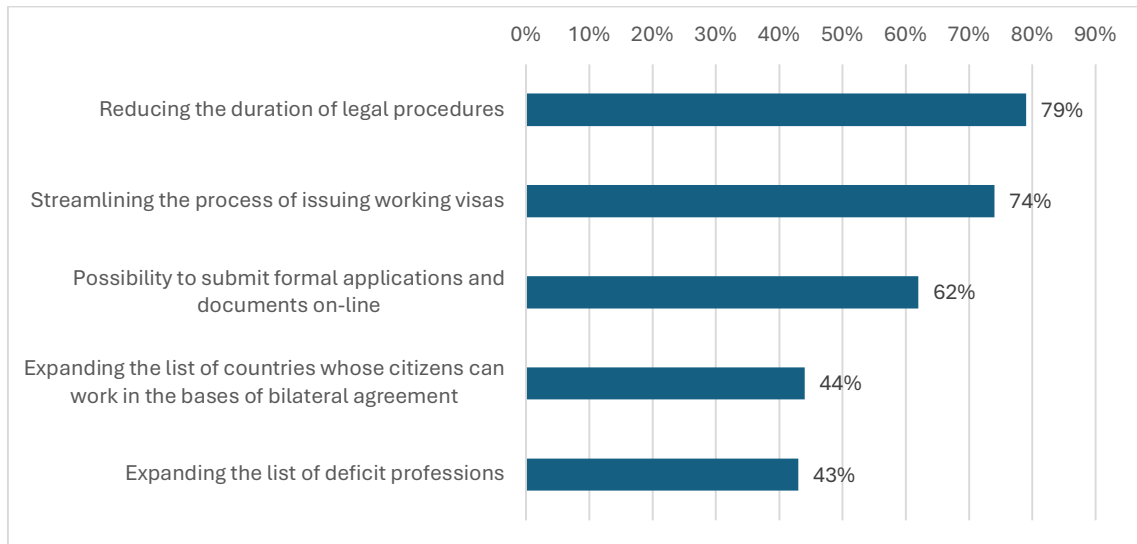
Moreover, more than half (46 %) of the respondents are not aware of the social partners' discussions on employment and challenges related to third-country workers at the sectoral and national level. 21 % of the respondents are aware of the discussions and are familiar with the content of the discussions.

### 1.8. Gaps in supporting the employment of third-country nationals

The survey results indicate that companies have made efforts to implement various training and qualification measures to support the labour market integration of third-country workers. However, the areas with the most notable gaps include combating over-qualification and the use of digital tools. In terms of soft skills, companies perceive considerable gaps in providing additional language courses and communication skills. For information and counselling, the most notable gaps are in the counselling/mentoring/coaching and career guidance. While companies have made significant efforts in providing civic/social-cultural orientation courses, they perceive gaps in preventing discrimination and raising awareness about diversity.

Respondents believe that the priority for facilitating the employment of third-country nationals should be to reduce the length of legal procedures, streamline the process for issuing work visas and allow formal applications and documents to be submitted online (Figure 18).

**Figure 18: Proposed changes in regulations to facilitate third-country workers employment**



N=117

Source: Own calculations based on the survey

## 2. Recruit4Tomorrow - Analýza výsledkov dotazníkového zisťovania – Slovenská republika

Táto analýza vznikla na základe výsledkov dotazníkového zisťovania, ktoré prebiehalo na vzorke 148 slovenských spoločností od 22. apríla do 30. júna 2024. Témou dotazníkového zisťovania bolo zamestnávanie štátnych príslušníkov tretích krajín. V úvode analýza stručne popisuje základné informácie o spoločnosti, súčasný stav zamestnávania štátnych príslušníkov tretích krajín, ich pôvodu a miezd. Druhá časť analýzy sa zaoberá výhodami a prekážkami zamestnávania štátnych príslušníkov tretích krajín, ich zastúpením a nedostatkami v podpore ich zamestnávania.

### 2.1. Základné informácie o spoločnosti

Základné informácie o spoločnostiach zapojených do dotazníkového zisťovania sú uvedené v Tabuľke č. 1.

Tabuľka č. 10: Veľkosť, klasifikácia a odvetvie spoločnosti

		Frekvencia	Percento
<b>Veľkosť (počet pracovníkov) (N = 146)</b>	Menej ako 10	10	7%
	11-50	42	29%
	51-250	46	31%
	251-500	22	15%
	Viac ako 500	26	18%
<b>Klasifikácia spoločnosti (N = 146)</b>	Rodinná firma	32	22%
	Domáca súkromná obchodná spoločnosť	64	44%
	Domáca verejná obchodná spoločnosť	10	7%
	Dcérska spoločnosť nadnárodnej spoločnosti	37	25%
	Iné	3	2%
<b>Odvetvie (N = 146)</b>	Stavebníctvo	15	10%
	Pohostinstvo a cestovný ruch	14	10%
	Zdravotná starostlivosť	3	2%
	Výroba	32	22%
	Ropný, plynárenský priemysel	5	3%
	Automobilový priemysel	9	6%

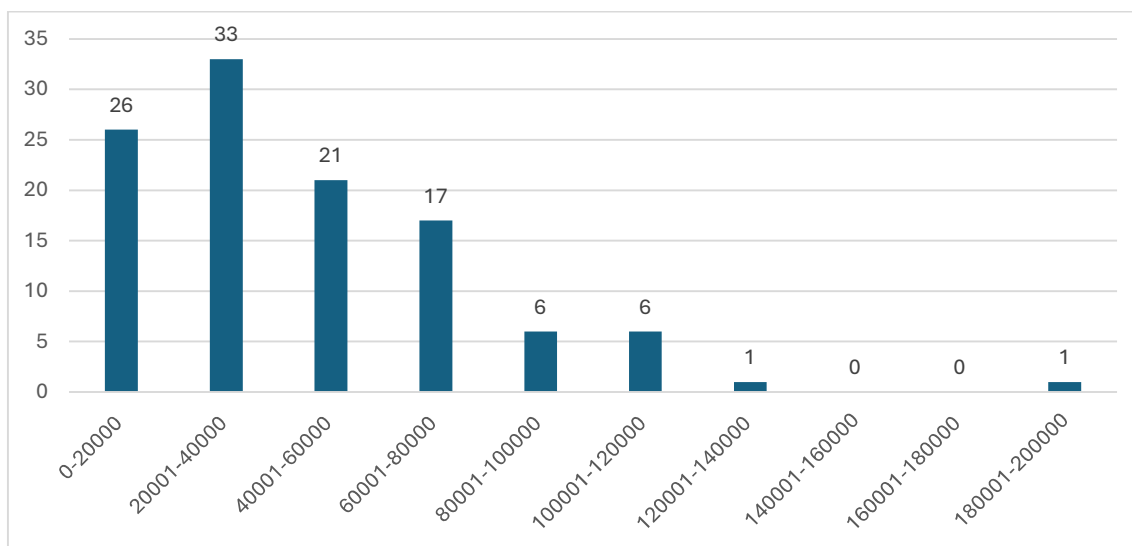


	IKT	15	10%
	Obchod	13	9%
	Iné	40	27%

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

V roku 2023 bola priemerná pridaná hodnota na jedného pracovníka v skúmaných podnikoch 45,193.5 EUR<sup>6</sup> ročne. Rozloženie pridanej hodnoty na pracovníka medzi skúmanými spoločnosťami vykazuje široké spektrum s koncentráciou v stredných pásmach. Väčšina respondentov spadá do rozpätia 20 001 až 40 000 EUR (Obrázok č. 1).

**Obrázok č. 19: Pridaná hodnota na pracovníka (za rok, v EUR) v roku 2023**



N=111

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Priemerná hrubá mzda, ktorú uvádzajú spoločnosti zapojené do prieskumu, je 1,857 EUR<sup>7,8</sup> mesačne. Z rozdelenia priemerných hrubých miezd medzi skúmané spoločnosti vyplýva, že tri štvrtiny (78 %) spoločností ponúkali priemernú hrubú mzdu do 2,300 EUR mesačne.

Priemerná hrubá mzda uvádzaná skúmanými spoločnosťami je 3 398,1 EUR mesačne. 82 % spoločností ponúka priemernú hrubú mzdu do 3 000 EUR mesačne.

Dotazníkového zisťovania sa zúčastnilo široké spektrum respondentov pracujúcich na rozličných pozíciách v zapojených spoločnostiach (Tabuľka č. 2). Medzi respondentmi boli výrazne zastúpení zástupcovia HR oddelení a manažmentu, čo je v súlade s metodikou dotazníkového zisťovania. 57 % respondentov tvorili muži.

<sup>6</sup> Štandardná odchýlka: 32 220,98, min: 10,000, max: 200,000

<sup>7</sup> Štandardná odchýlka: 666,3, min: 100, max: 3,520

<sup>8</sup> Priemerná hrubá mzda na Slovensku v roku 2023 bola 1,430 EUR.

**Tabuľka č. 11: Pozícia respondenta v spoločnosti**

	<b>Frekvencia</b>	<b>Percento</b>
Generálny riaditeľ / riaditeľ / člen predstavenstva	34	23%
Vedúci oddelenia ľudských zdrojov	38	26%
Odborník na ľudské zdroje	30	21%
Vedúci právneho oddelenia	13	9%
Odborník v oblasti práva	10	7%
Iné	21	14%

N=107

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Viac ako 90 % všetkých respondentov malo aspoň 5 rokov praxe, pričom väčšina má viac ako 15 rokov praxe v príslušnom odbore (Tabuľka č. 3).

**Tabuľka č. 12: Dĺžka praxe respondentov**

	<b>Frekvencia</b>	<b>Percento</b>
Menej ako 5 rokov	10	7%
5 - 15 rokov	34	23%
16 - 25 rokov	50	34%
26 - 35 rokov	26	18%
Viac ako 35 rokov	26	18%

N=146

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

## 2.2. Zamestnávanie zahraničných pracovníkov – súčasná situácia

Väčšina opýtaných podnikov (77 %) uviedla, že v súčasnosti zamestnávajú zahraničných pracovníkov (Tabuľka č. 4). Takmer všetci respondenti, ktorí zamestnávajú cudzincov (93,7 %) uviedli, že zamestnávajú aj zahraničných pracovníkov z krajín mimo EÚ – štátnych príslušníkov tretích krajín.

**Tabuľka č. 13: Zamestnávanie zahraničných pracovníkov**

	<b>Frekvencia</b>	<b>Percento</b>
Áno	113	77%
Nie	33	23%

N=146

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

V prípade podnikov, ktoré v súčasnosti nezamestnávajú zahraničných pracovníkov (Tabuľka č. 5), boli skúmané aj ich budúce plány na zamestnávanie takýchto pracovníkov. Z týchto respondentov plánuje v budúcnosti zamestnávať zahraničných pracovníkov 64 % (24 respondentov). Konkrétne 13 z týchto 24 respondentov uviedlo, že plánujú zamestnávať štátnych príslušníkov tretích krajín. Naopak, 32 % (13 respondentov) neplánuje v budúcnosti zamestnávať zahraničných pracovníkov.

**Tabuľka č. 14: Stratégia spoločnosti pri zamestnávaní zahraničných pracovníkov**

	<b>Frekvencia</b>	<b>Percento</b>
V budúcnosti plánujeme zamestnávať zahraničných pracovníkov (z krajín EÚ).	11	27%
V budúcnosti plánujeme zamestnávať štátnych príslušníkov tretích krajín.	13	32%
V budúcnosti neplánujeme zamestnávať žiadnych zahraničných pracovníkov.	13	32%
Iné (uved'te prosím)	4	9%

N=41

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

### 2.3. Zamestnávanie štátnych príslušníkov tretích krajín

Pri skúmaní počtu pracovníkov - štátnych príslušníkov tretích krajín, ktorí sú v súčasnosti zamestnaní v dotazovaných spoločnostiach, štvrtina respondentov uviedla, že štátny príslušníci tretích krajín tvoria menej ako 5 % ich zamestnancov, rovnaký podiel respondentov zamestnáva 6 % - 10 % štátnych príslušníkov tretích krajín. 18 % spoločností zamestnáva 11 % až 15 % štátnych príslušníkov tretích krajín (Tabuľka č. 6). Tieto spoločnosti pôsobia primárne v oblasti výroby, IKT a iných služieb.

**Tabuľka č. 15: Rozloženie štátnych príslušníkov tretích krajín medzi pracovnou silou**

	<b>Frekvencia</b>	<b>Percento</b>
menej ako 5 %	26	25%
6 - 10%	26	25%
11 - 15%	19	18%
16 - 20%	14	14%
viac ako 20%	16	16%
nepoznám presný údaj	2	2%

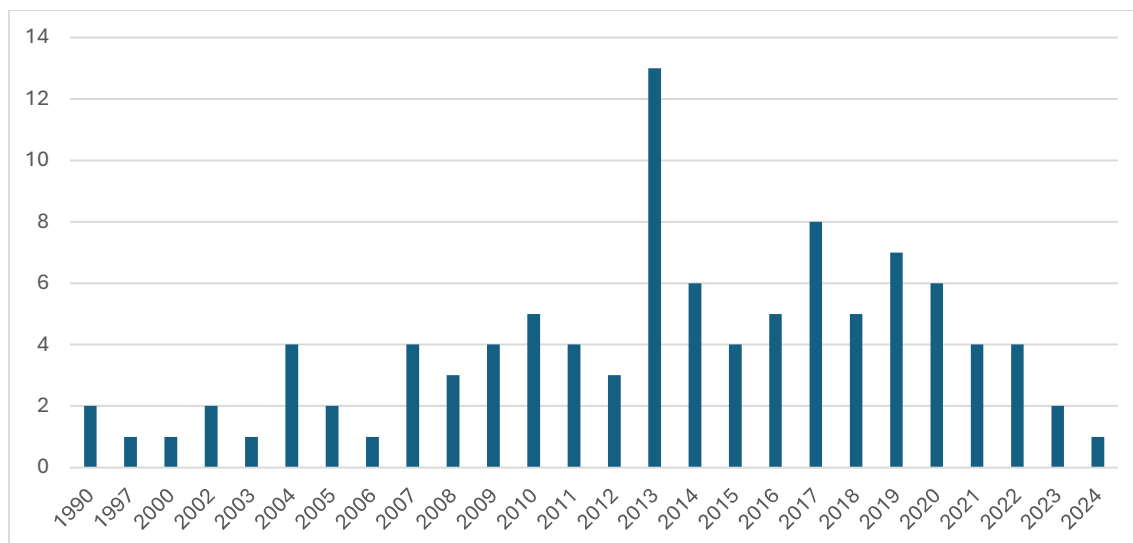
N=103

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Z Obrázku č. 2 vyplýva, že hoci niektoré spoločnosti zamestnávajú štátnych príslušníkov tretích krajín už od roku 1990, v rokoch 2013<sup>9</sup> a 2017 došlo k výraznému a citeľnému nárastu tejto praxe.

<sup>9</sup> Prudký nárast počtu zamestnancov z tretích krajín na Slovensku v roku 2013 možno vysvetliť dvoma skutočnosťami: 1) v roku 2013 vstúpilo na Slovensku do platnosti niekoľko opatrení proti nelegálnemu zamestnávaniu cudzincov a 2) na Slovensku začali s podporou AmCham-u fungovať Centrá zdieľaných služieb, ktoré umožnili širšiu diskusiu o zamestnávaní štátnych príslušníkov tretích krajín. Najviac z týchto zamestnancov pochádzalo z Ukrajiny, Južnej Kórei a Číny.

**Obrázok č. 20: Počet spoločností, ktoré zamestnávajú štátnych príslušníkov tretích krajín podľa rokov začiatku ich zamestnávania**



N=102

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Výsledky dotazníkového zisťovania naznačujú, že hoci zamestnanci – štátni príslušníci tretích krajín – v skúmaných spoločnostiach majú rôznu vzdelanostnú úroveň, je medzi nimi výrazné zastúpenie osôb so stredoškolským vzdelaním. 44 % respondentov sa domnieva, že vzdelanostná štruktúra štátnych príslušníkov tretích krajín je porovnateľná so vzdelanostnou štruktúrou celkovej pracovnej sily v podniku. Avšak 33 % respondentov si myslí, že štátni príslušníci tretích krajín majú nižšiu priemernú úroveň vzdelania (Tabuľka č. 7). Za zmienku stojí aj fakt, že menej ako tretinu štátnych príslušníkov tretích krajín tvoria ženy. Veková štruktúra štátnych príslušníkov tretích krajín v skúmaných podnikoch ukazuje, že väčšina z nich má 31 až 40 rokov.

**Tabuľka č. 16: Priemerná vzdelanostná úroveň zamestnancov spoločnosti vs. vzdelanostná úroveň štátnych príslušníkov tretích krajín**

	Frekvencia	Percento
Porovnateľná	42	44%
Štátni príslušníci tretích krajín majú v priemere nižšie vzdelanie	31	33%
Štátni príslušníci tretích krajín majú v priemere vyššie vzdelanie	11	12%
Ťažko povedať	9	9%

N=95

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Viac ako 40 % štátnych príslušníkov tretích krajín je zamestnaných na pomocné práce, o niečo menej na špecializované, odborné a technické práce a výrobné práce (Tabuľka č. 8).

**Tabuľka č. 17: Druh práce štátnych príslušníkov tretích krajín**

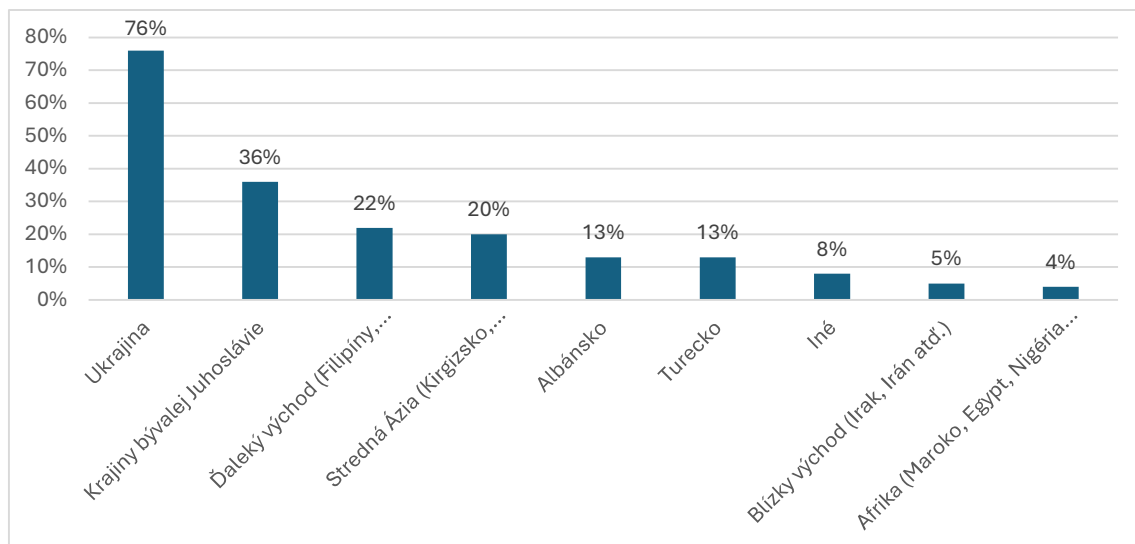
	<b>Frekvencia</b>	<b>Percento</b>
Práca v službách (predaj, bezpečnosť a ochrana, osobné služby a pod.)	23	24%
Špecializované, odborné a technické práce (služby v zdravotníctve, právne služby, vedecké práce, odborné technické práce a pod.)	38	40%
Výrobné práce	34	36%
Pomocné práce (upratovacie služby, služby v poľnohospodárstve, rybolove a lesníctve, pomocné práce v kuchyni a pod.)	40	42%
Riadiace a manažérske práce	14	15%
Iné	15	16%

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

## 2.4. Pôvod štátnych príslušníkov tretích krajín

Z výsledkov dotazníkového zisťovania vyplýva, že štátni príslušníci tretích krajín pochádzajú prevažne z Ukrajiny. Značný počet pochádza aj z krajín bývalej Juhoslávie, ako sú Bosna a Hercegovina, Srbsko, Čierna Hora a Severné Macedónsko, ako aj z ďalekého východu (Obrázok č. 3).

**Obrázok č. 21: Pôvod štátnych príslušníkov tretích krajín**

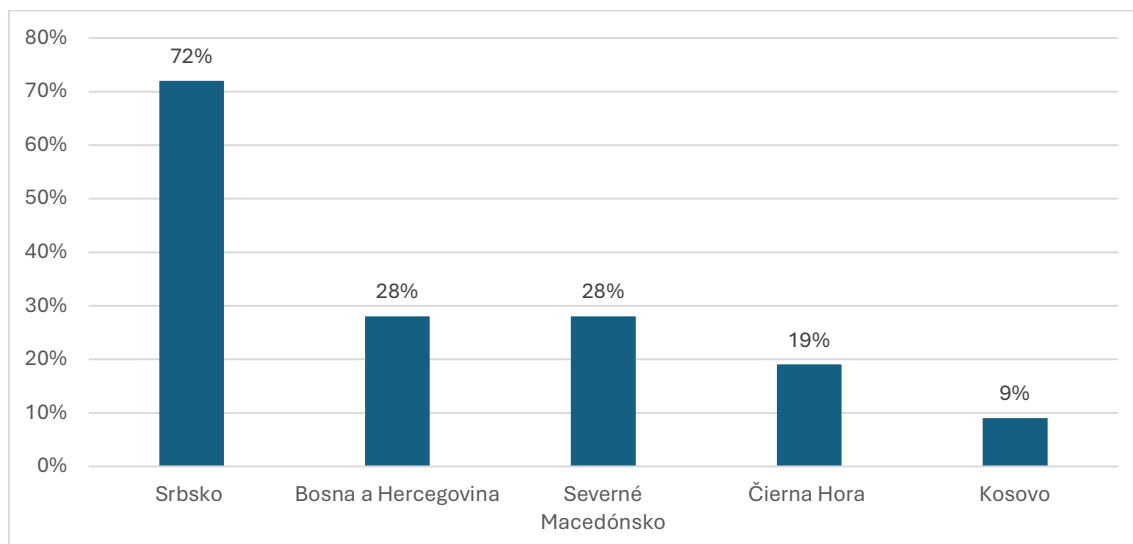


N=96

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

V rámci krajín bývalej Juhoslávie, najviac štátnych príslušníkov tretích krajín pochádza zo Srbska (Obrázok č. 4).

**Obrázok č. 22: Pôvod štátnych príslušníkov tretích krajín z krajín bývalej Juhoslávie**



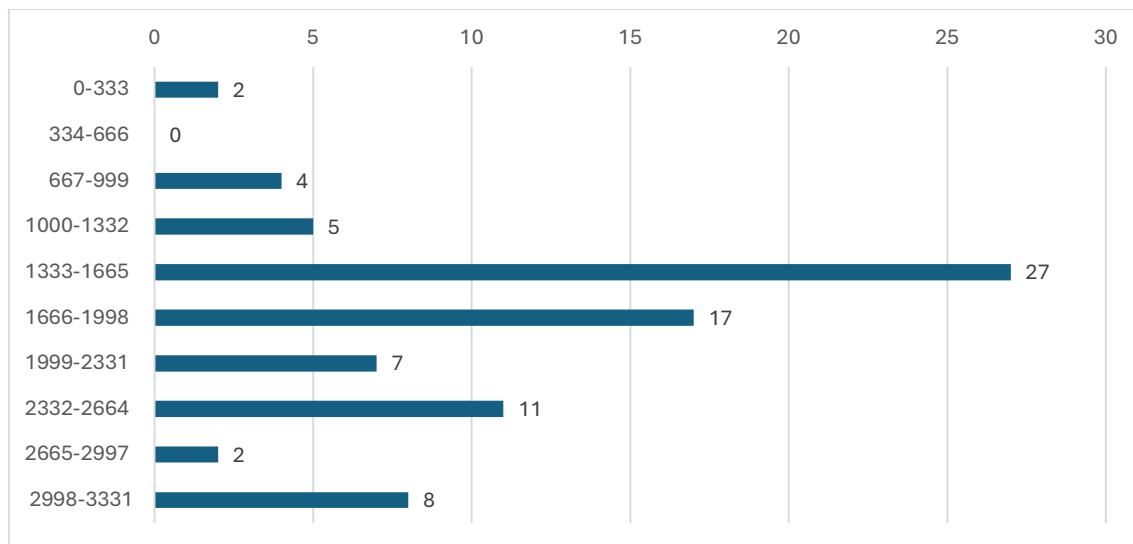
N=32

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

## 2.5. Mzdy štátnych príslušníkov tretích krajín

Priemerná hrubá mesačná mzda štátnych príslušníkov tretích krajín v dotazovaných spoločnostiach je 1 857,4 EUR. Priemerná hrubá mzda pracovníkov z tretích krajín je nižšia ako celkový priemer spoločností. Obrázok č. 5 znázorňuje rozloženie priemernej hrubej mzdy (mesačne, v EUR) vyplácanej štátnym príslušníkom tretích krajín v skúmaných spoločnostiach.

**Obrázok č. 23: Rozloženie priemernej hrubej mzdy vyplácanej štátnym príslušníkom tretích krajín (mesačne, v EUR)**



N=83

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Napriek numerickému rozdielu v priemerných mzdách považuje väčšina podnikov mzdy štátnych príslušníkov tretích krajín za porovnateľné so mzdami ostatných zamestnancov (Tabuľka č. 9).

**Tabuľka č. 18: Kvalitatívne porovnanie priemernej hrubej mzdy štátnych príslušníkov tretích krajín s ostatnými pracovníkmi v tej istej spoločnosti**

	Frekvencia	Percento
Nižšia	18	20%
Porovnateľná	59	66%
Vyššia	11	12%
Neviem	1	1%

N=57

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

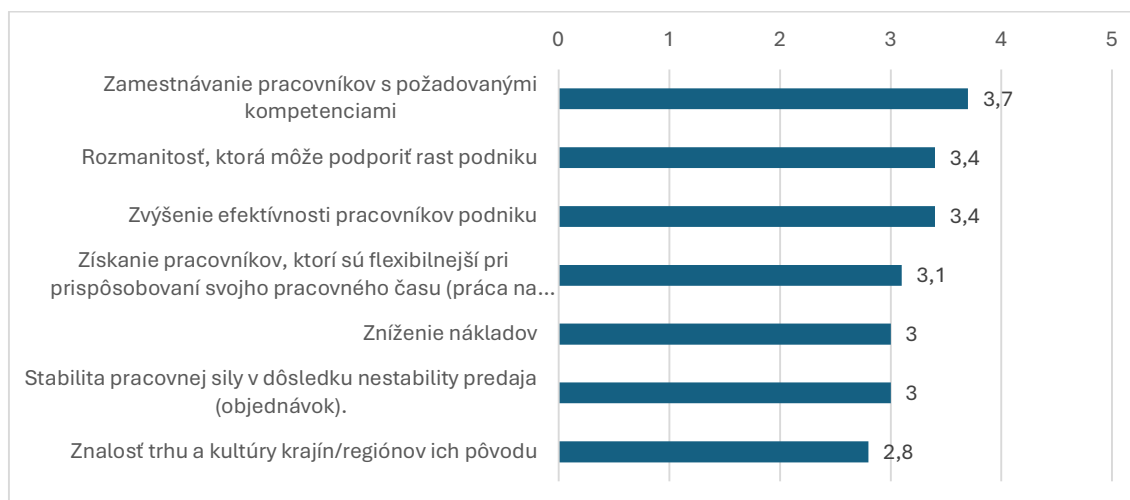
Žiadna z dotazovaných spoločností nedostáva za zamestnávanie štátnych príslušníkov tretích krajín špeciálne dotácie (nad rámec tých, na ktoré majú nárok aj bežní zamestnanci).

## 2.6. Výhody a prekážky zamestnávania štátnych príslušníkov tretích krajín

Hlavnými výhodami, ktoré spoločnosti vidia v zamestnávaní štátnych príslušníkov tretích krajín, sú nábor pracovníkov s požadovanými kompetenciami, rozmanitosť, ktorá môže pomôcť spoločnosti rásť, a vyššia efektívnosť pracovníkov v spoločnosti.

Respondenti nevnímajú stabilitu pracovnej sily v dôsledku kolísania tržieb (objednávok) a znalosti trhu a kultúry krajín/regiónov pôvodu ako benefity zamestnávania štátnych príslušníkov tretích krajín (Obrázok č. 6).

**Obrázok č. 24: Výhody zamestnávania štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**



N=26

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Je zrejmé, že jedným z hlavných dôvodov, prečo sa podniky rozhodli zamestnávať zahraničných pracovníkov, je nedostatok domácich pracovníkov a získanie pracovníkov s príslušnými kompetenciami (Obrázok č. 7).

**Obrázok č. 25: Dôvody zamestnávania štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**

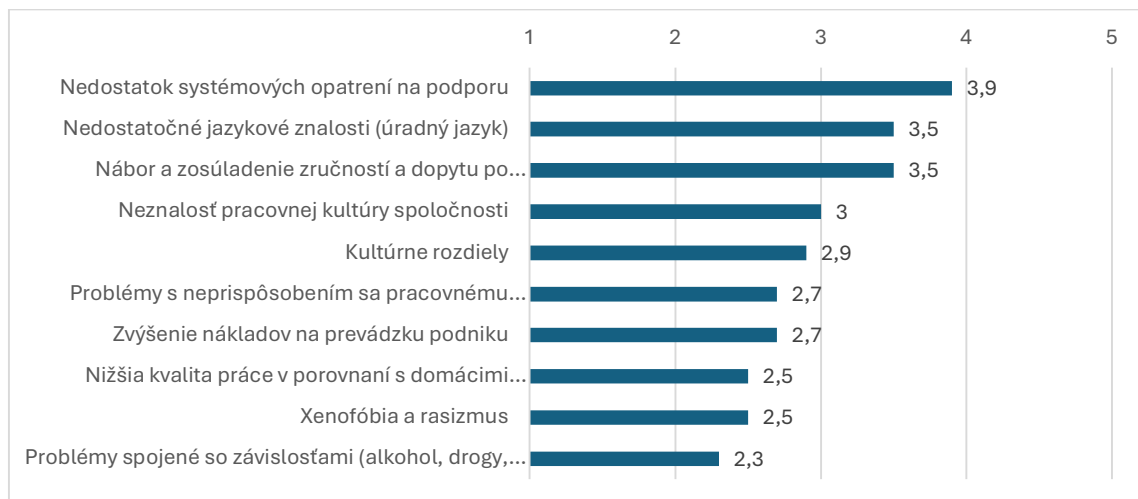


N=87

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Za najväčšie potenciálne problémy spojené so zamestnávaním štátnych príslušníkov tretích krajín považujú respondenti nedostatok systémových opatrení a nedostatočnú znalosť úradného jazyka (Obrázok č. 8).

**Obrázok č. 26: Potenciálne problémy spojené so zamestnávaním štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**



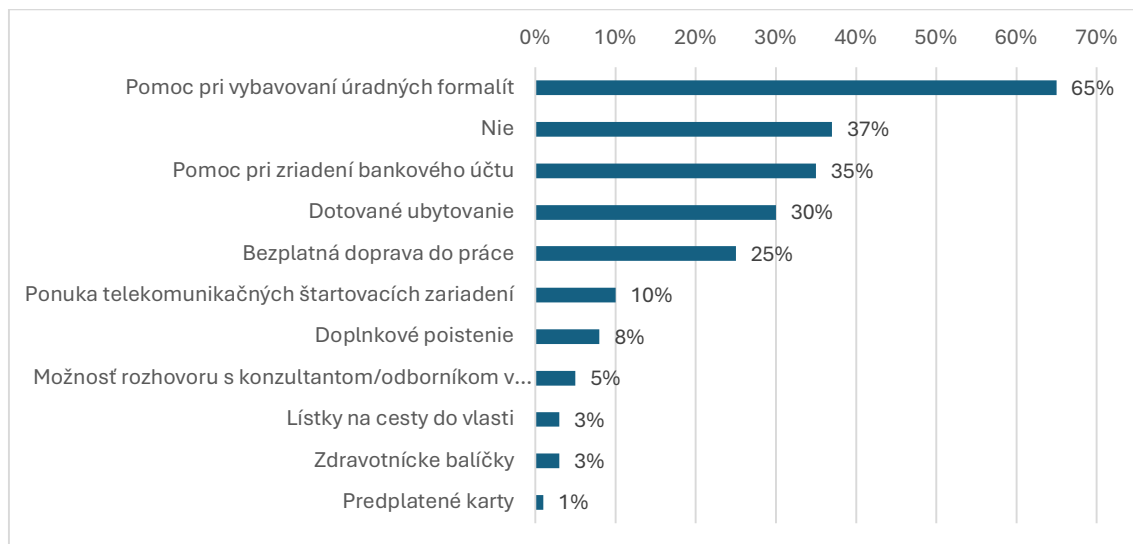
N=117

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu



Pokiaľ ide o služby ponúkané štátnym príslušníkom tretích krajín, 65 % respondentov ponúka pomoc pri vybavovaní úradných formalít, 35 % pomoc pri otvorení bankového účtu a 30 % ponúka dotované ubytovanie (Obrázok č. 9).

**Obrázok č. 27: Služby ponúkané štátnym príslušníkom tretích krajín**

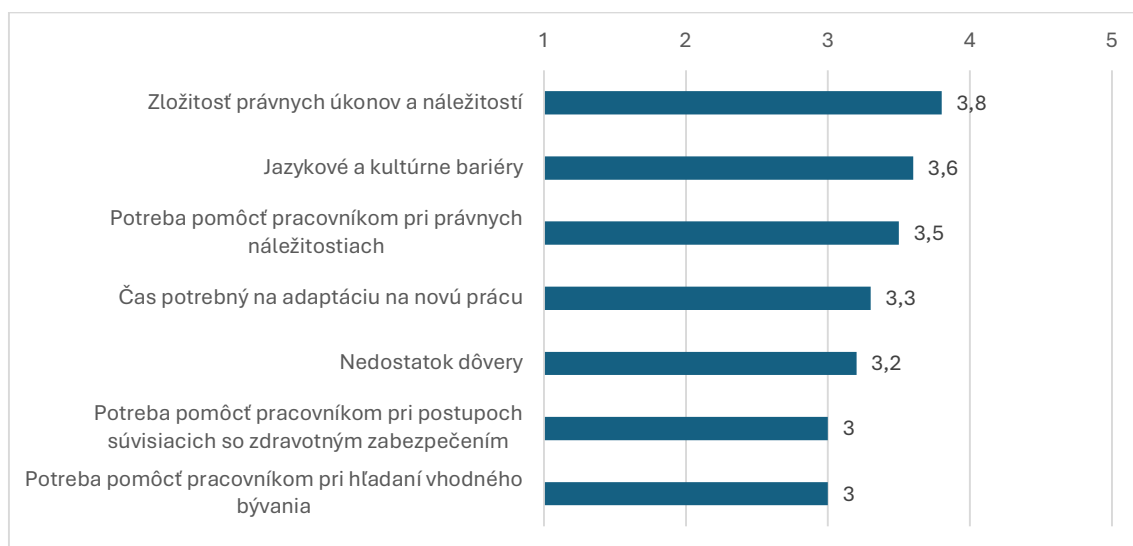


N=91

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Výsledky prieskumu naznačujú, že najvýznamnejšími prekážkami pri zamestnávaní štátnych príslušníkov tretích krajín sú právna zložitosť, jazykové a kultúrne bariéry a potreba pomoci pri právnych postupoch (Obrázok č. 10). Potreba pomôcť pri procesoch súvisiacich so zdravotnou starostlivosťou a hľadaním ubytovania sú nmeň významnými bariérami pre slovenských respondentov.

**Obrázok č. 28: Bariéry zamestnávania štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**

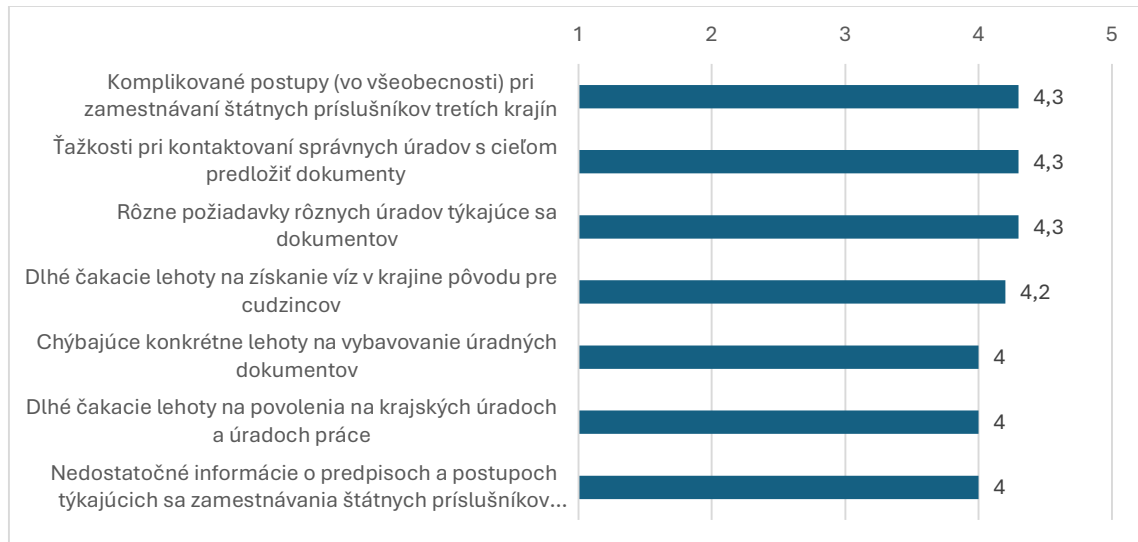


N=120

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Existuje široká škála formálnych prekážok súvisiacich so zabezpečením právnej stránky zamestnávania štátnych príslušníkov tretích krajín - napríklad komplikované postupy (vo všeobecnosti) pri ich zamestnávaní, ťažkosti s kontaktovaním administratívnych pracovníkov a rôzne požiadavky (Obrázok č. 11). V dôsledku toho podniky nie sú schopné zamestnať týchto pracovníkov načas (Obrázok č. 12).

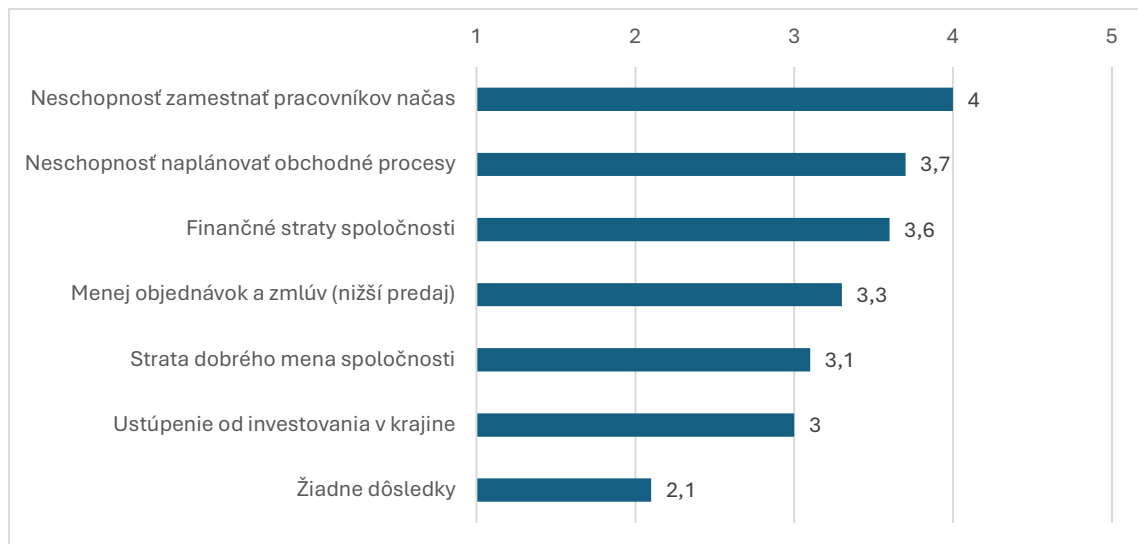
**Obrázok č. 29: Formálne prekážky súvisiace so zabezpečením právnej stránky zamestnávania štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**



N=72

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

**Obrázok č. 30: Dôsledky prekážok, ktorým čelia spoločnosti pri zamestnávaní štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**



N=113

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Najproblematickejším aspektom zamestnávania štátnych príslušníkov tretích krajín sú komplikované formálne a právne podmienky (Obrázok č. 13).

**Obrázok č. 31: Hodnotenie výrokov týkajúcich sa zamestnávania štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**

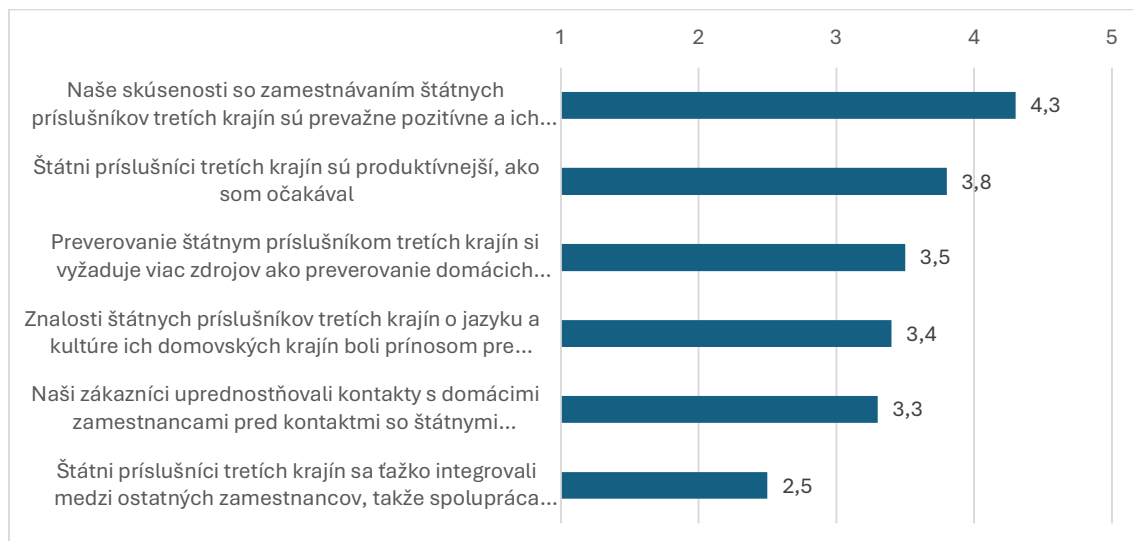


N=91

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Vo všeobecnosti sú však skúsenosti so zamestnávaním pracovníkov z tretích krajín prevažne pozitívne a ich jazykové znalosti sú dostatočné na to, aby mohli vykonávať svoju prácu (Obrázok č. 14). Spoločnosti vo všeobecnosti nesúhlasia s tým, že by štátni príslušníci tretích krajín mali problémy so začlenením sa medzi ostatných zamestnancov.

**Obrázok č. 32: Skúsenosti so zamestnávaním štátnych príslušníkov tretích krajín (1 = úplne nesúhlasím, 5 = úplne súhlasím)**



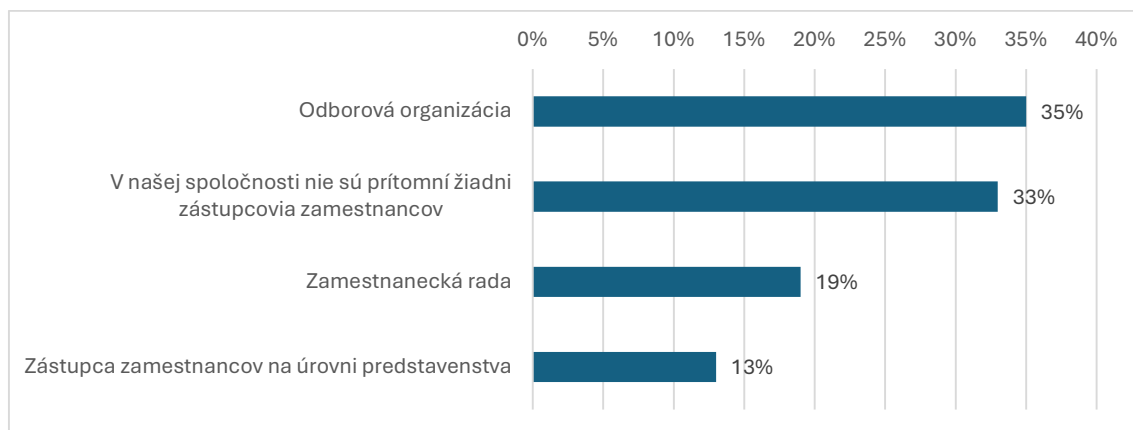
N=90

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

## 2.7. Zastupovanie zamestnancov

Najbežnejšou formou zastupovania zamestnancov sú odbory. Medzi jedna tretina respondentov nemá žiadnu formu zastupovania zamestnancov (Obrázok č. 15).

**Obrázok č. 33: Zastupovanie zamestnancov**

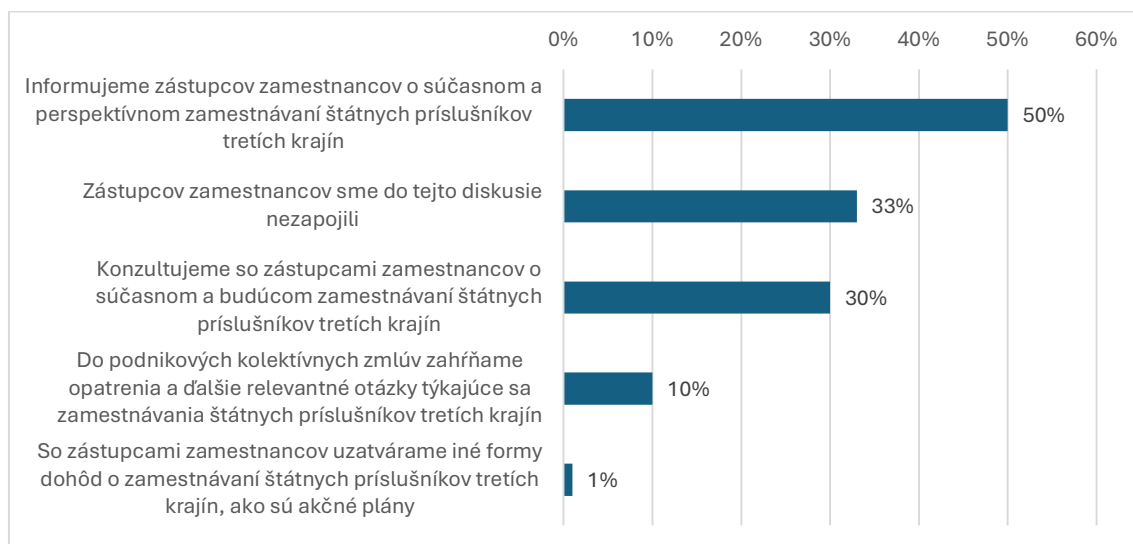


N=118

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Viac ako polovica dotazovaných spoločností, ktoré majú vo svojom podniku nejakú formu zastupovania zamestnancov, informuje zástupcov zamestnancov o súčasnom a budúcim zamestnávaní štátnych príslušníkov tretích krajín (Obrázok č. 16). Situácia je veľmi podobná, pokiaľ ide o ich plány do budúcnosti (Obrázok č. 17).

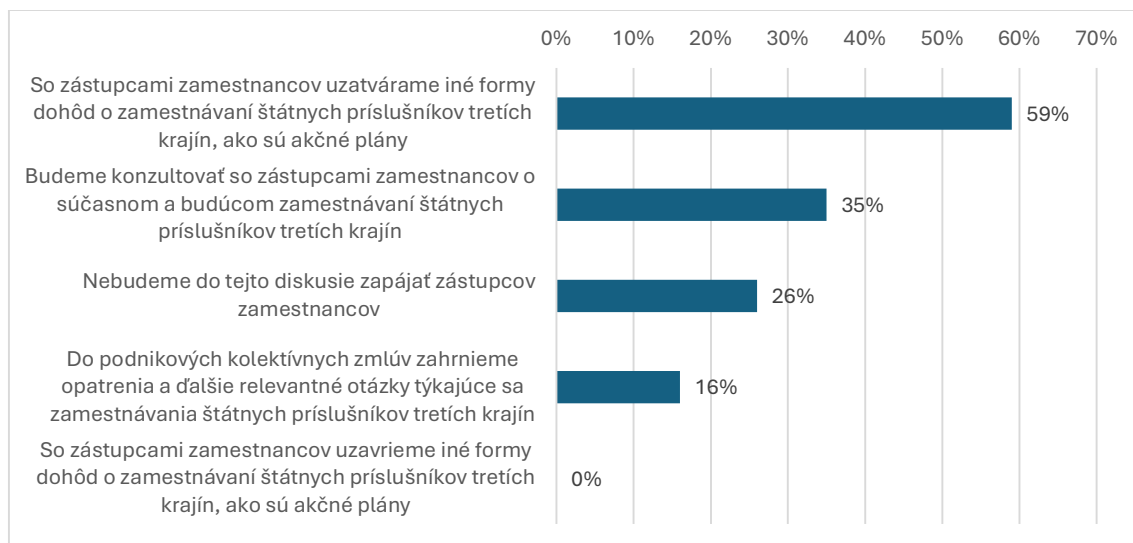
**Obrázok č. 34: Riešenie problémov súvisiacich so zamestnávaním štátnych príslušníkov tretích krajín**



N=86

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

**Obrázok č. 35: Plány na riešenie problémov súvisiacich so zamestnávaním štátnych príslušníkov tretích krajín**



N=86

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu

Takmer polovica (46 %) respondentov nemá vedomosť o tom, že na úrovni sociálnych partnerov prebieha dialóg o výzvach v zamestnávaní štátnych príslušníkov tretích krajín na odvetvovej a vnútroštátnej úrovni. O dialógu vie 21 % respondentov a sú oboznámení s ich obsahom.

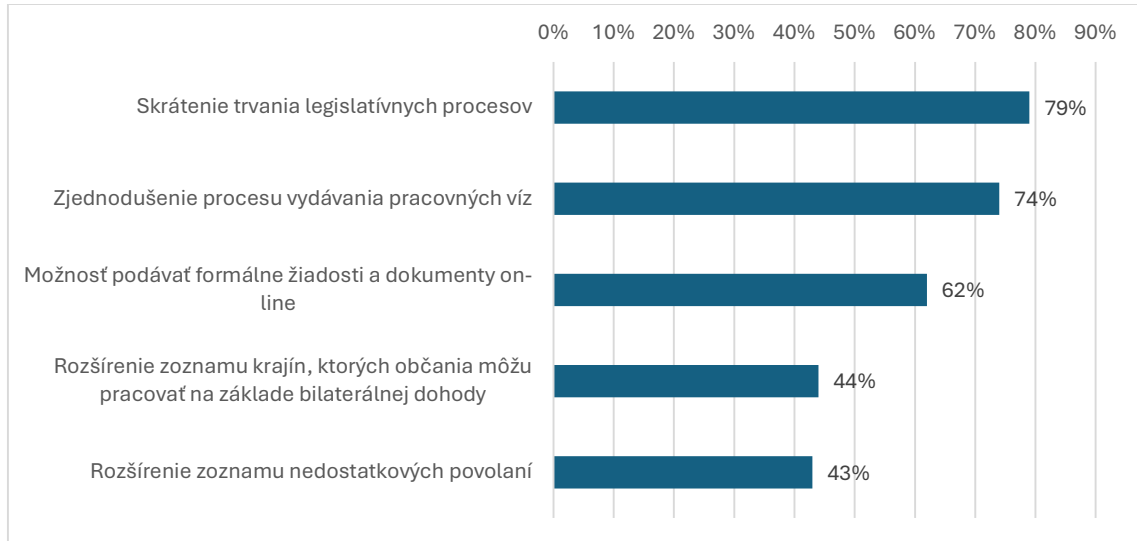
## 2.8. Nedostatky v podpore zamestnávania štátnych príslušníkov tretích krajín

Z výsledkov prieskumu vyplýva, že spoločnosti sa snažia zavádzať rôzne opatrenia v oblasti odbornej prípravy na podporu integrácie štátnych príslušníkov tretích krajín na trhu práce. Medzi oblasti s najvýraznejšími nedostatkami však patrí prekvalifikovanosť a využívanie digitálnych nástrojov. Pokiaľ ide o mäkké zručnosti, spoločnosti vnímajú značné nedostatky v poskytovaní doplnkových jazykových kurzov a komunikačných zručností. V oblasti informovania a poradenstva sú najvýraznejšie nedostatky v poradenstve/mentoringu/koučingu a kariérovom poradenstve.

Hoci spoločnosti vynakladajú značné úsilie pri poskytovaní kurzov občianskej/sociálno-kultúrnej orientácie, vnímajú nedostatky v oblasti prevencie diskriminácie a zvyšovania povedomia o kultúrnej rozmanitosti.

Respondenti sa domnievajú, že prioritou pre uľahčenie zamestnávania štátnych príslušníkov tretích krajín by malo byť skrátenie dĺžky zákonných postupov, zjednodušenie procesu vydávania pracovných víz a umožnenie podávania formálnych žiadostí a dokumentov online (Obrázok č. 18).

**Obrázok č. 36: Navrhované zmeny predpisov na uľahčenie zamestnávania štátnych príslušníkov tretích krajín**



N=117

Zdroj: Vlastný výpočet na základe dotazníkového prieskumu



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DG EMPLOYMENT, SOCIAL AFFAIRS AND INCLUSION

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**RECRUIT4TOMORROW**

**Encouraging employment of third-country nationals  
through social dialogue**

**Deliverable D2.1**

**National Analysis Report for Slovenia**

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## **Executive summary**

The deliverable, National Analysis Report for Slovenia, presents the findings from the survey amongst Slovenian employers regarding the employment of third-country nationals in Slovenia which was executed as part of the WP2 in the project. In the scope of WP2, we analysed and researched the challenges that labour market stakeholders are facing when dealing with the matching of labour supply and demand by employment of third-country nationals.

The presented deliverable is a detailed report from the national survey results in Slovenia which will be a basis and a starting point for further analysis and social dialogue on all levels in WP3 where the consortia partners will prepare measures to address the labour market needs and recommendations for policymakers. The first part of the deliverable presents the national survey report in English and the second part (Chapter 2) presents the Slovene translation.

## 1. Recruit4Tomorrow - Survey report on Slovenia

The survey report presents insights based on descriptive statistics from a sample of Slovene firms. Conducted between April 22 and June 30, 2024, the survey received complete or partial responses from 114 companies regarding the employment of third-country nationals. The report begins with a brief summary of the sample characteristics, the current state of employing foreign and third-country workers, their origins, and their wages. The second part delves into the advantages and barriers of employing third-country workers, their representation, and the gaps in support for their employment.

### 1.1. Sample characteristics

The characteristics of the companies included in the sample are shown in Table 1.

**Table 1: Company size, classification and industry**

		Frequency	Percent
<b>Size (number of workers) (N = 114)</b>	Less than 10	8	7%
	11-50	21	18%
	51-250	39	34%
	251-500	18	16%
	More than 500	28	25%
<b>Company classification (N = 112)</b>	Family-owned company	16	14%
	Domestic private company	48	43%
	Domestic public company	13	12%
	MNE subsidiary	32	29%
	Other	3	2%
<b>Industry (N = 114)</b>	Construction	11	10%
	Hospitality and tourism	4	4%
	Healthcare	6	5%
	Manufacturing	37	32%
	Oil and gas sector	1	1%
	Automotive sector	4	4%
	ICT (IT) sector	8	7%
	Trade	8	7%
	Other services	35	30%

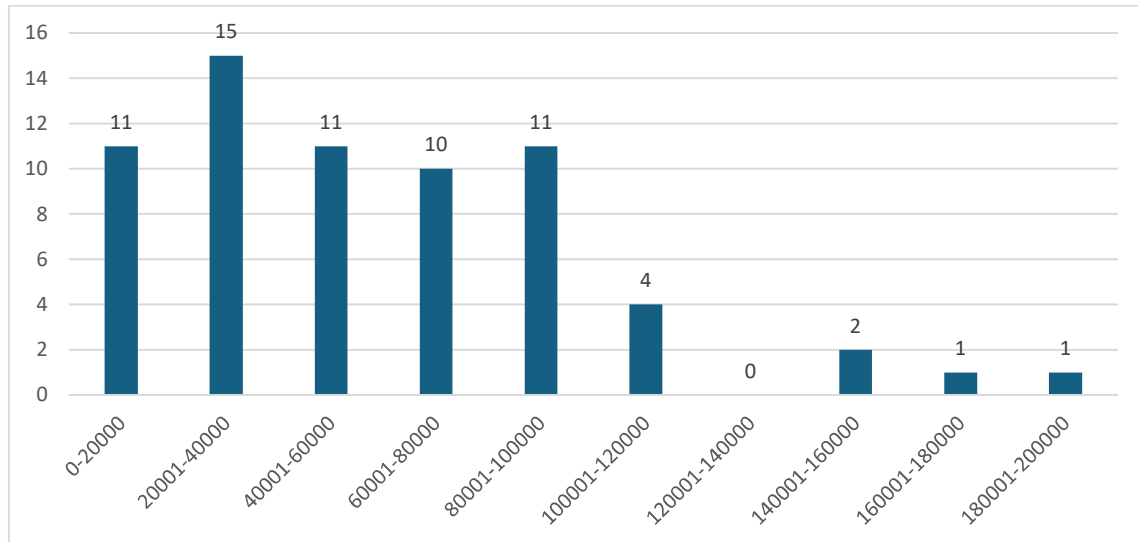
Source: Own calculations based on the survey

In 2023, the average value added per worker among companies surveyed was EUR 57,274.1<sup>1</sup> per year. The distribution of value added per worker among the surveyed companies shows a

<sup>1</sup> Std. deviation: 41,949.95, min: 5,000, max: 200,000

broad spectrum with a concentration in the middle ranges. Most of the respondents fall into the EUR 20,001 to EUR 40,000 range (Figure 1).

**Figure 1: Value added per worker (per year, in EUR) in 2023 (number of respondents)**



N=66

Source: Own calculations based on the survey

Additionally, the average gross wage reported by the companies surveyed is EUR 2,128<sup>2,3</sup> per month. The distribution of average gross salaries among the surveyed companies shows that three-quarters (77.8%) of the companies in the sample report an average monthly gross salary below 2,638 euros per month.

The survey included a wide range of respondents from different positions within their respective organisations (Table 2). The characteristics of the respondents show a significant representation from HR departments, in line with the focus of the survey. More than two-thirds of the respondents were female.

**Table 2: Respondent's position in the company**

	Frequency	Percent
CEO / Director / Member of the management board	14	13%
Head of HR	47	44%
HR professional	30	28%
Head of Legal Department	2	2%
Legal professional	5	5%
Other	9	8%

N=107

Source: Own calculations based on the survey

<sup>2</sup> Std. deviation: 1,054.2, min: 100, max: 5,809

<sup>3</sup> The average gross wage in Slovenia in 2023 was EUR 2,220.95.

In addition, almost all respondents have at least 5 years of work experience, with most having more than 15 years in their respective fields (Table 3).

**Table 3: Duration of working experience of respondents**

	<b>Frequency</b>	<b>Percent</b>
Less than 5 years	2	2%
5 - 15 years	24	22%
16 - 25 years	47	43%
26 - 35 years	24	22%
More than 35 years	12	11%

N=109

Source: Own calculations based on the survey

## 1.2. Employment of foreign workers: current situation

The majority, namely, 81% of the companies surveyed reported that they currently employ foreign workers (Table 4). Almost two-thirds of respondents reported that they employ non-EU foreign workers.

**Table 4: Employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
Yes	91	81%
No	22	19%

N=113

Source: Own calculations based on the survey

For those companies that do not currently employ foreign workers (Table 5), their plans for employing foreign workers were also examined. Of these respondents, 62% (13 respondents) plan to employ foreign workers in the future. Specifically, 9 of these 13 respondents indicated that they plan to employ third-country workers. Conversely, 48% (10 respondents) do not plan to employ foreign workers in the future.

**Table 5: Strategy for future employment of foreign workers**

	<b>Frequency</b>	<b>Percent</b>
We plan to employ foreign workers from EU countries in the future	4	19%
We plan to employ third-country workers in the future	9	43%
We do not plan to employ any foreign workers in the future	10	48%

N=21

Source: Own calculations based on the survey

### 1.3. Employment of third-country (non-EU) workers

Looking at the number of non-EU workers currently employed in the companies, a quarter of the respondents reported that less than 5% of their workforce consisted of non-EU workers, while a fifth reported between 6% and 10%. Notably, 16% of companies have more than 20% non-EU nationals in their workforce (Table 6). These companies operate in construction, manufacturing and other services (logistics and transport).

**Table 6: Distribution of third-country workers in the workforce**

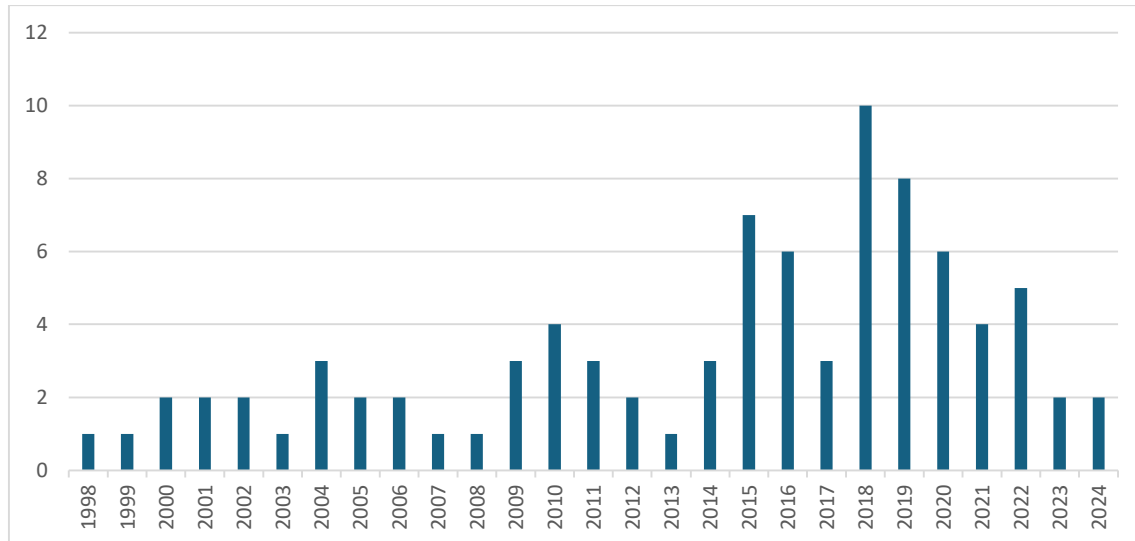
	Frequency	Percent
Less than 5% of the total workforce	28	25%
6-10%	23	20%
11-15%	8	7%
16-20%	2	2%
More than 20%	18	15%
Don't know exactly	1	1%

N=80

Source: Own calculations based on the survey

Figure 2 shows that while some companies have been employing third-country nationals since 1998, there has been a significant and noticeable increase in this practice since 2015. The data show a steady increase in the number of companies employing third-country nationals over the years, with significant peaks in 2015, 2018 and 2019.

**Figure 2: Number of companies reporting the start of employment for third-country nationals by year**



N=77

Source: Own calculations based on the survey



The results suggest that while the third-country workers in the surveyed companies come from a variety of educational backgrounds, there is a significant representation of those with secondary and tertiary education. Among the 40 surveyed companies that employ these workers and responded to the question about educational structure, 47% have secondary education and 41.6% have tertiary education. More than half of the respondents (57%) believe that the educational structure of third-country workers is comparable to that of the general workforce in the company. However, 32% of respondents think that third-country workers have a lower average level of education (Table 7). It is also worth noting that less than a third of third-country workers are women. The age structure of third-country workers in the companies surveyed shows that the majority are between 31 and 40 years old.

**Table 7: Company vs. third-country worker educational levels**

	<b>Frequency</b>	<b>Percent</b>
Comparable	39	57%
On average, third-country workers have lower education.	22	32%
On average, third-country workers have higher education.	6	10%
Difficult to answer	1	1%

N=68

Source: Own calculations based on the survey

More than a third of non-EU workers are employed for production work, followed by professional, technical and service work (Table 8).

**Table 8: Job types of third-country workers**

	<b>Frequency</b>	<b>Percent</b>
Service work (sales, personal care, protective services, personal services, etc)	16	17%
Professional and technical work (healthcare services, legal and other professional services, science and engineering professional services, etc)	26	27%
Production work	35	36%
Elementary work (cleaning services, agriculture, fishing and forestry services, food preparation assistance, etc.)	11	11%
Managerial work	7	7%
Other	2	2%

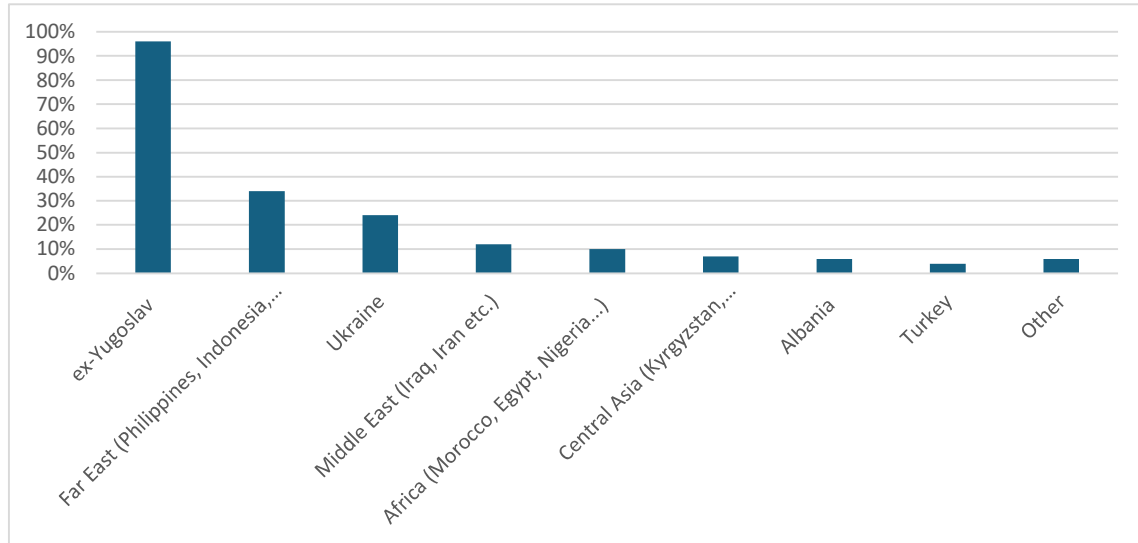
N=97

Source: Own calculations based on the survey

### 1.4. The origin of third-country workers

The survey results indicate that third-country workers predominantly come from former Yugoslav countries (Bosnia and Herzegovina, Serbia, Montenegro, North Macedonia) and Kosovo. Additionally, a significant number of third-country workers are from countries in the Far East such as the Philippines, Indonesia, Nepal, and Thailand, as well as from Ukraine (Figure 3).

**Figure 3: The origin of third-country workers**

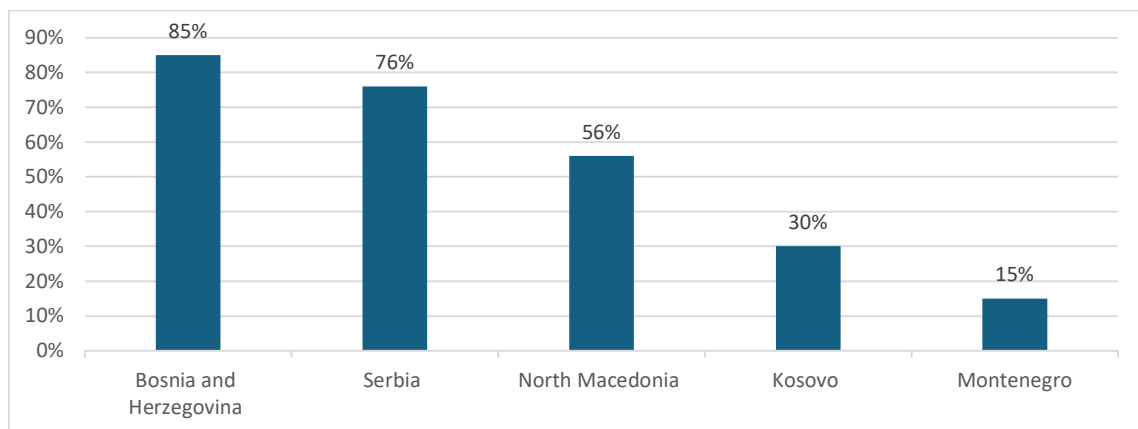


N=68

Source: Own calculations based on the survey

When asked which ex-Yugoslav countries the workers originate from, the most common answer was Bosnia and Herzegovina (Figure 4), which was also stated as the first most frequent country by the respondents.

**Figure 4: Origin of third-country workers from non-EU former Yugoslav Countries**



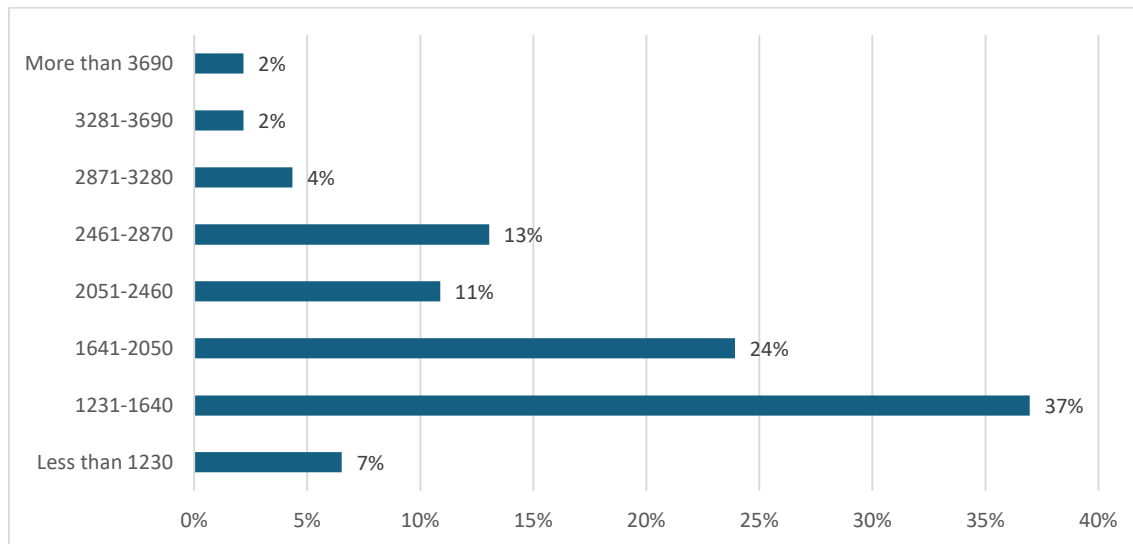
N=54

Source: Own calculations based on the survey

## 1.5. Wages of third-country workers

The average gross wage of third-country workers in the surveyed companies is EUR 1,893.9.<sup>4</sup> The average gross wage for third-country workers is lower than the overall company average of EUR 2,128 per month. Figure 5 illustrates the distribution of average gross wages (per month, in EUR) paid to third-country workers in the surveyed companies.

**Figure 5: Distribution of average gross wages paid to third-country workers (per month, in EUR)**



N=46

Source: Own calculations based on the survey

Despite the numerical difference in average wages, the majority of companies consider the wages of third-country workers to be comparable to those of their other employees (Table 9).

**Table 9: Qualitatively comparing average gross wages of third-country workers to other workers in the same company**

	Frequency	Percent
Lower	4	7%
Comparable	50	87%
Higher	1	2%
I don't know	2	4%

N=57

Source: Own calculations based on the survey

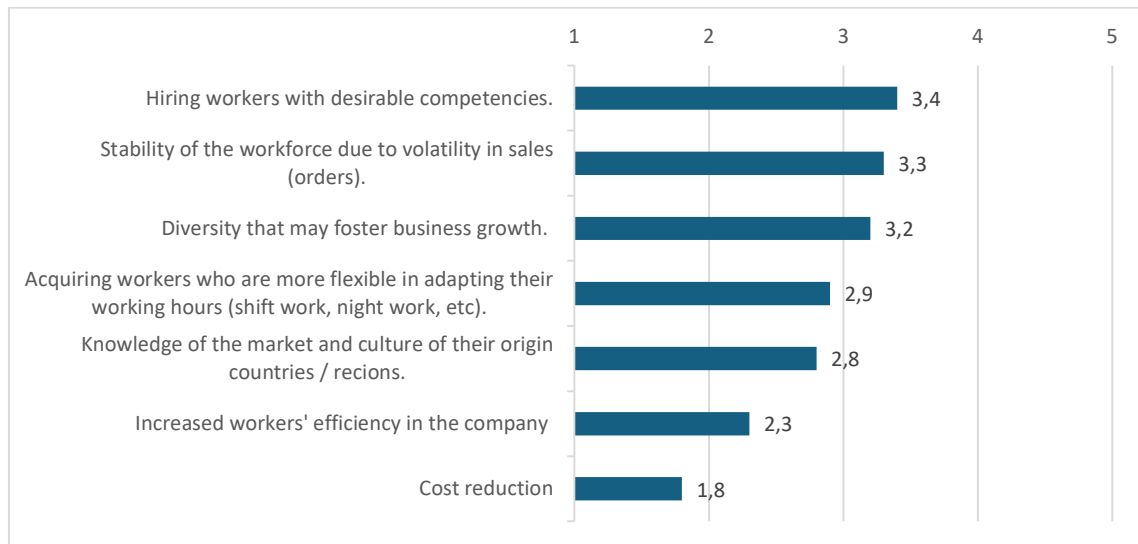
All the companies surveyed claimed that they did not receive any subsidies for employing third-country workers that other workers were not entitled to.

<sup>4</sup> Std. deviation: 659.76, min: 840, max: 4,103

## 1.6. Advantages and barriers in employing third-country workers

The main advantages that companies see in employing third-country nationals are the recruitment of workers with desirable competencies, the stability of the workforce due to fluctuations in sales (orders), and the diversity that can help the company grow. They do not see cost reduction as a benefit of employing third-country workers (Figure 6).

**Figure 6: Advantages of employing third-country workers (1 = fully disagree, 5 = fully agree)**

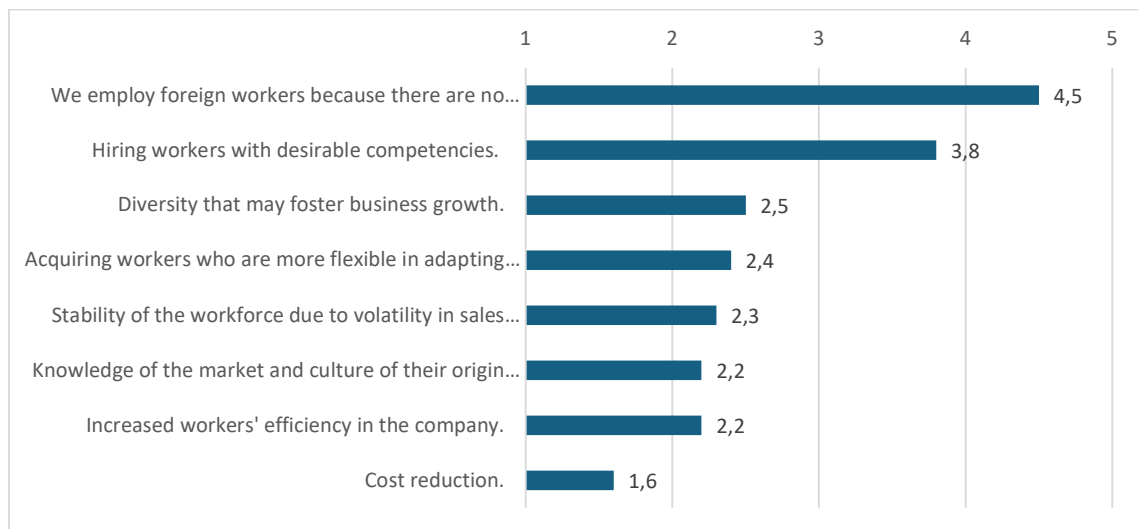


N=21

Source: Own calculations based on the survey

It is clear that one of the main reasons why companies decide to employ foreign workers is because of a lack of domestic workers and to obtain workers with the appropriate competencies (Figure 7).

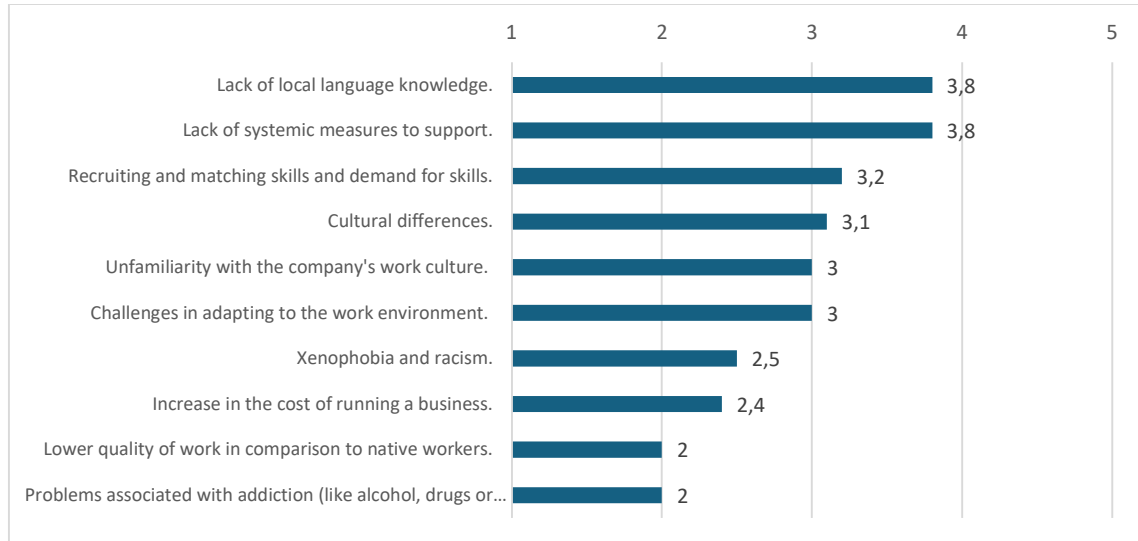
**Figure 7: Reasons for employing third-country workers (1 = fully disagree, 5 = fully agree)**



N=58

Source: Own calculations based on the survey

**Figure 8: Potential problems related to employing third-country workers (1 = fully disagree, 5 = fully agree)**



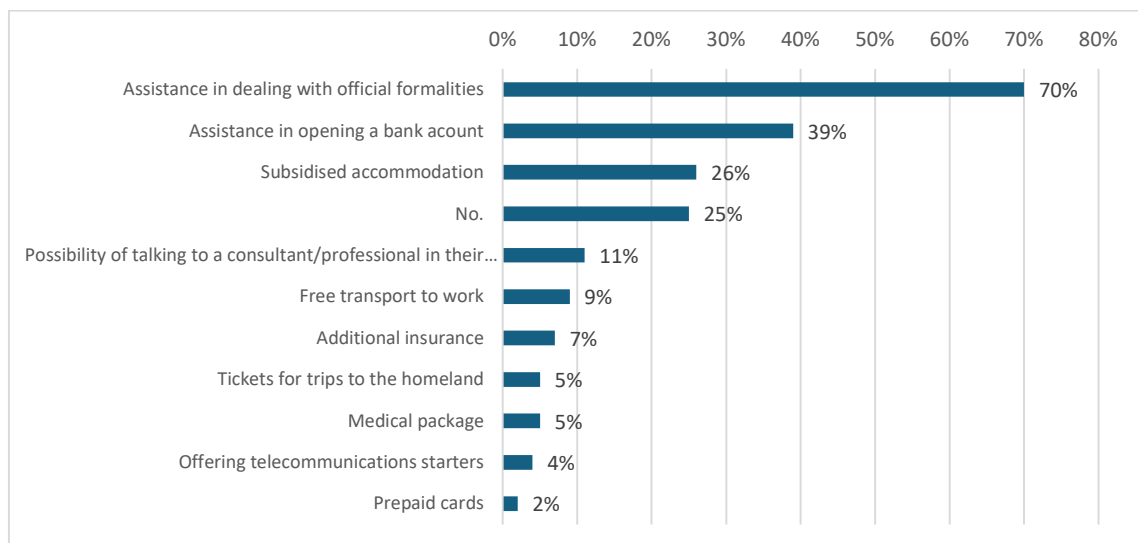
N=83

Source: Own calculations based on the survey

Respondents consider a lack of knowledge of the local language and a lack of systemic support measures to be the biggest potential problems associated with employing third-country workers (Figure 8).

Regarding the amenities, offered to third-country workers, 70% of the respondents offer third-country workers help with official formalities, 39% offer third-country workers help with opening a bank account, and 26% offer third-country workers subsidised accommodation (Figure 9).

**Figure 9: Amenities offered to third-country workers**

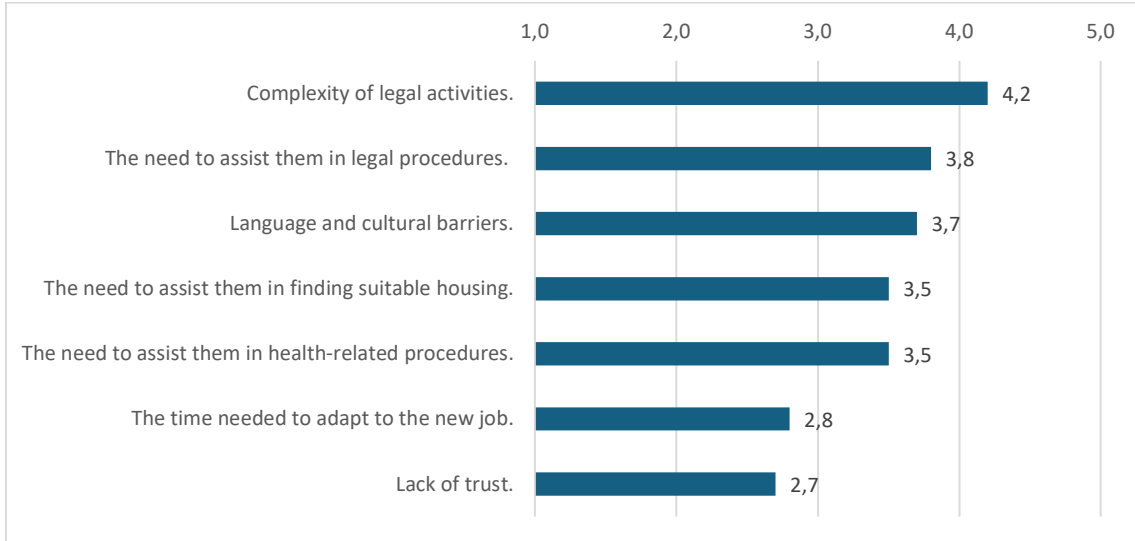


N=57

Source: Own calculations based on the survey

The survey results indicate that legal complexities and the need for assistance with legal procedures are the most significant barriers to employing third-country workers (Figure 10). Language and cultural barriers, as well as the need to find suitable accommodation and navigate health-related procedures, are also significant challenges. The time needed to adapt and lack of trust are perceived as less significant barriers.

**Figure 10: Barriers in employing third-country workers (1 = fully disagree, 5 = fully agree)**

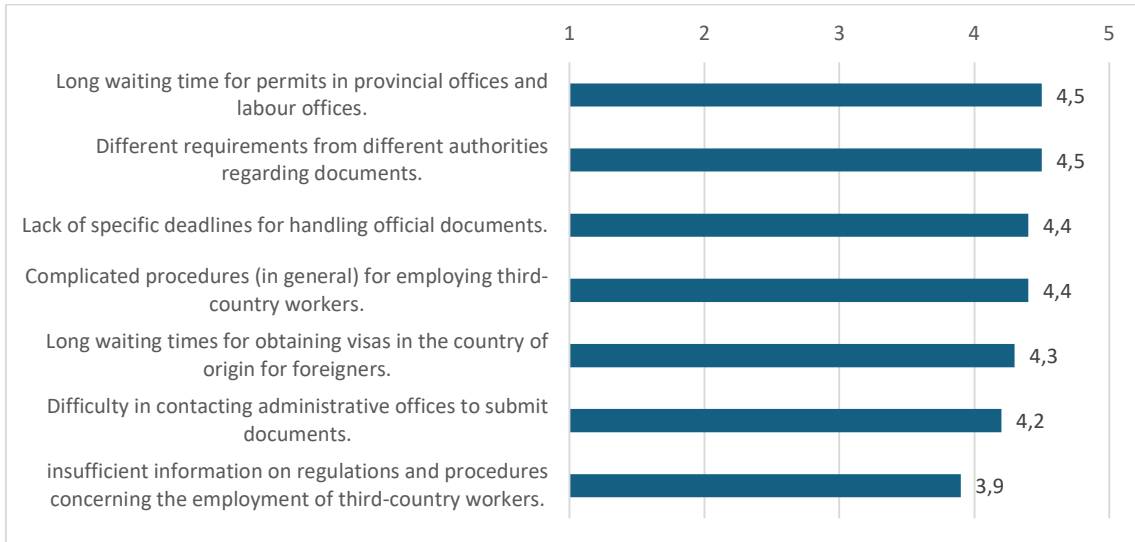


N=83

Source: Own calculations based on the survey

There is a high agreement about the wide range of formal barriers related to legal activities (Figure 11). The most pressing issues are the lengthy procedures for obtaining work and residence permits, the experience that different authorities have different requirements regarding documents, the inadequacy of deadlines for processing official documents, and the long waiting times for obtaining visas in the home country for workers from third countries.

**Figure 11: Formal barriers that are related to legal activities (1 = fully disagree, 5 = fully agree)**

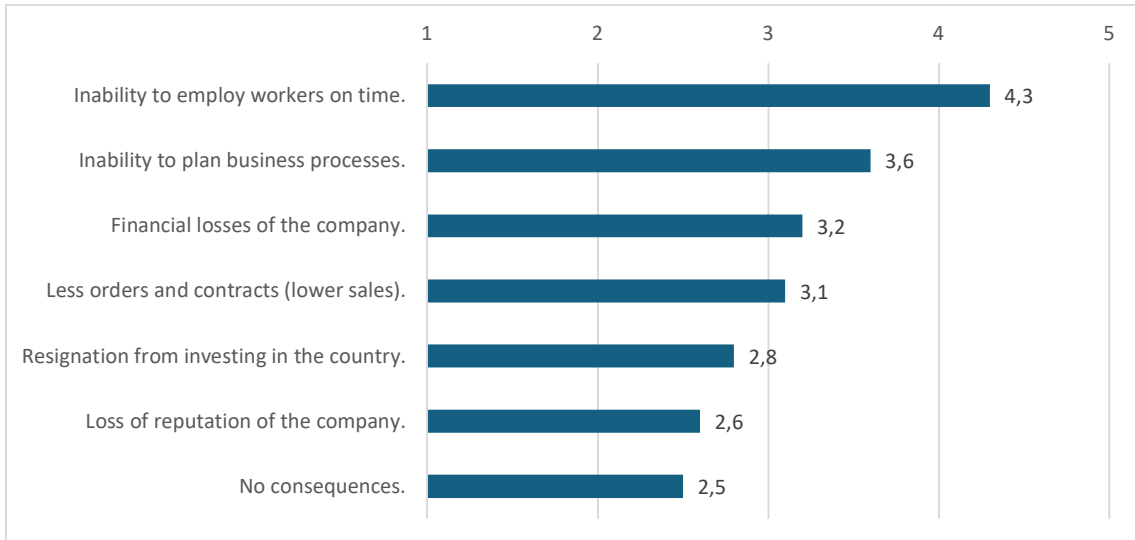


N=70

Source: Own calculations based on the survey

The consequences of the obstacles companies face when hiring workers from third countries are that companies cannot hire workers on time, have difficulties planning business processes, and sometimes receive fewer orders and contracts (Figure 12).

**Figure 12: Consequences of obstacles that companies face when employing third-country workers (1 = fully disagree, 5 = fully agree)**



N=67

Source: Own calculations based on the survey

The most problematic aspect of employing third-country workers is the complicated formal and legal conditions (Figure 13).

**Figure 13: Evaluation of statements regarding the employment of third-country workers (1 = fully disagree, 5 = fully agree)**

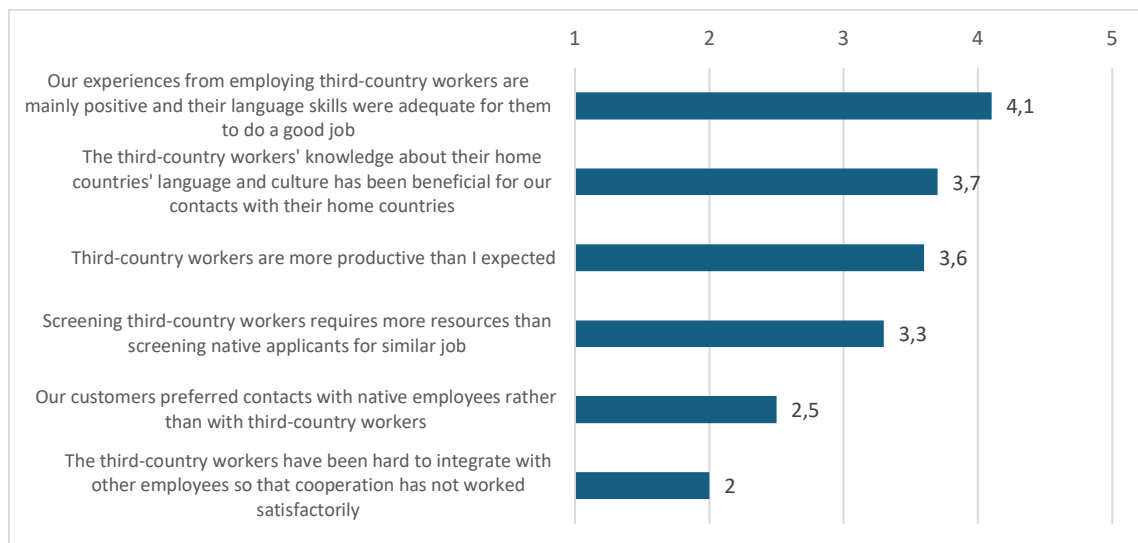


N=57

Source: Own calculations based on the survey

In general, however, the experience of employing third-country workers is mainly positive and their language skills have been sufficient for them to do a good job (Figure 14). Companies generally disagree that third-country workers have been difficult to integrate with other employees.

**Figure 14: Experiences with employing third-country employees (1 = fully disagree, 5 = fully agree)**



N=56

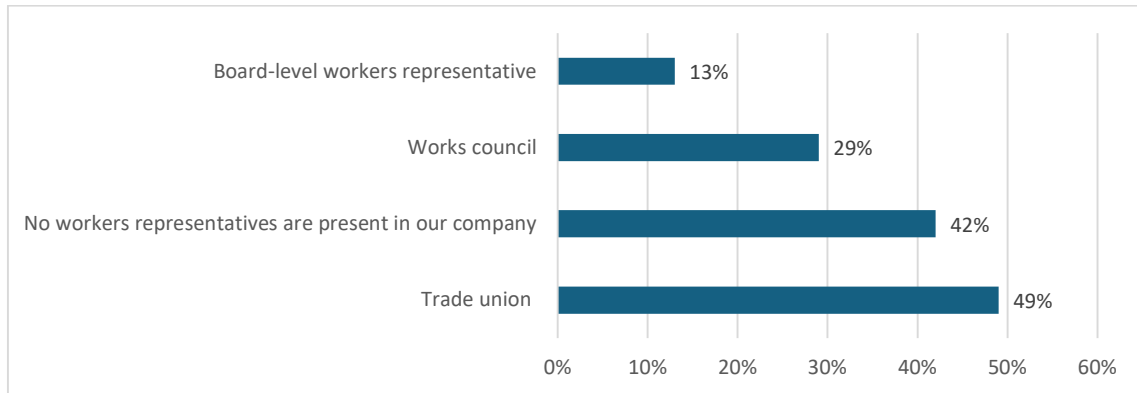
Source: Own calculations based on the survey



### 1.7. Workers' representation in companies

The companies surveyed first had to choose the form of workers' representation in their company (they could choose one or more). The most common form of workers' representation is the trade union. However, there are many companies in the sample that do not have any form of workers' representation (Figure 15).

**Figure 15: Workers representation in companies**

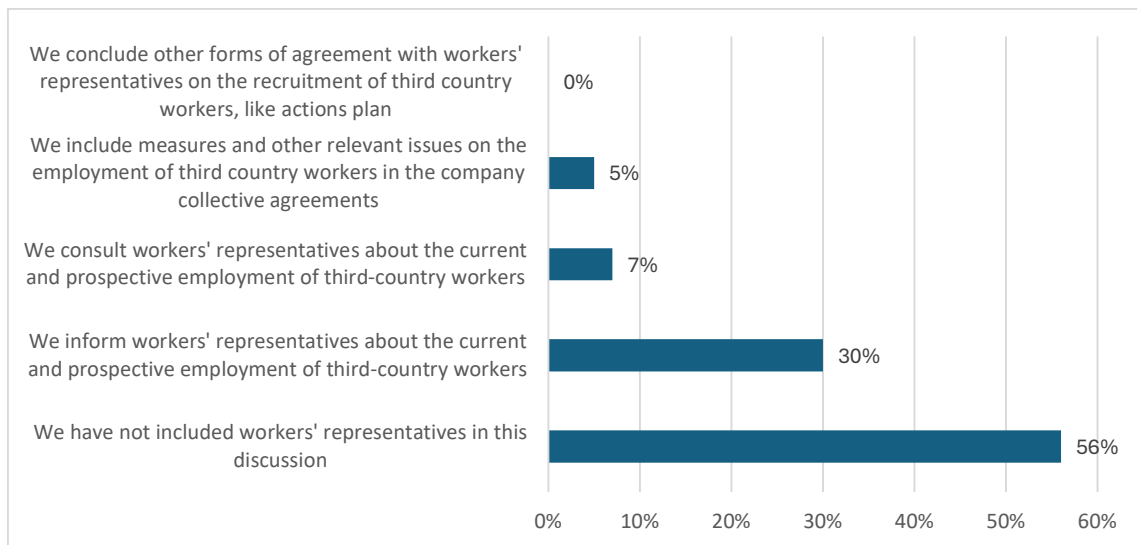


N=83

Source: Own calculations based on the survey

More than half of the respondents who have some form of workers' representation in their company did not involve workers' representatives in the discussion of the challenges posed by third-country workers (Figure 16). The situation is very similar when it comes to their plans (Figure 17).

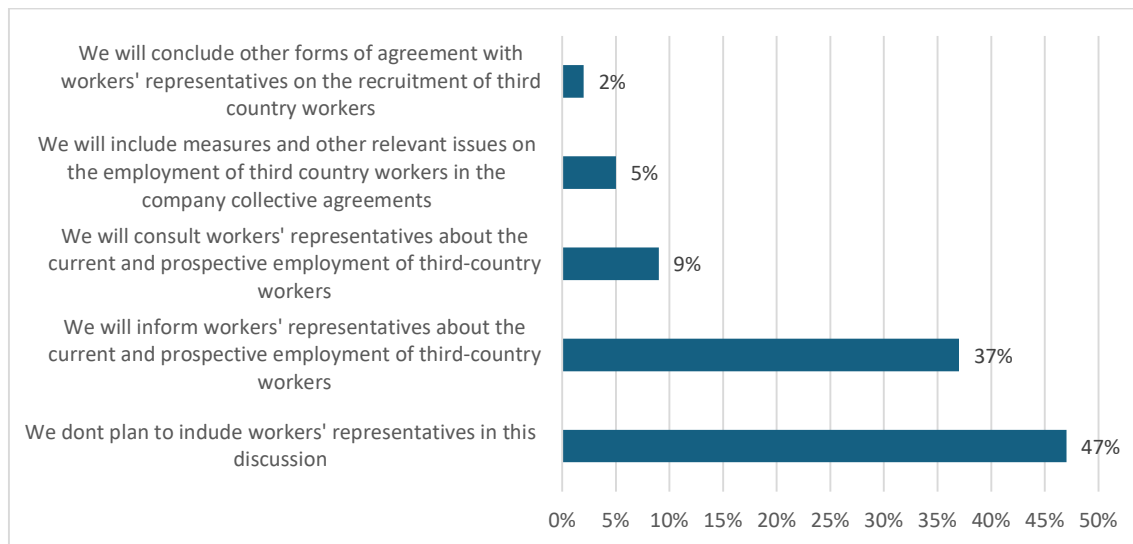
**Figure 16: Dealing with the challenges related to third-country workers**



N=43

Source: Own calculations based on the survey

**Figure 17: Plans to deal with the challenges related to third-country workers**



N=43

Source: Own calculations based on the survey

Moreover, more than half (54%) of the respondents are not aware of the social partners' discussions on employment and challenges related to third-country workers at the sectoral and national levels. Slightly more than a quarter, 27%, of the respondents are aware of the discussions but do not know what they are about.

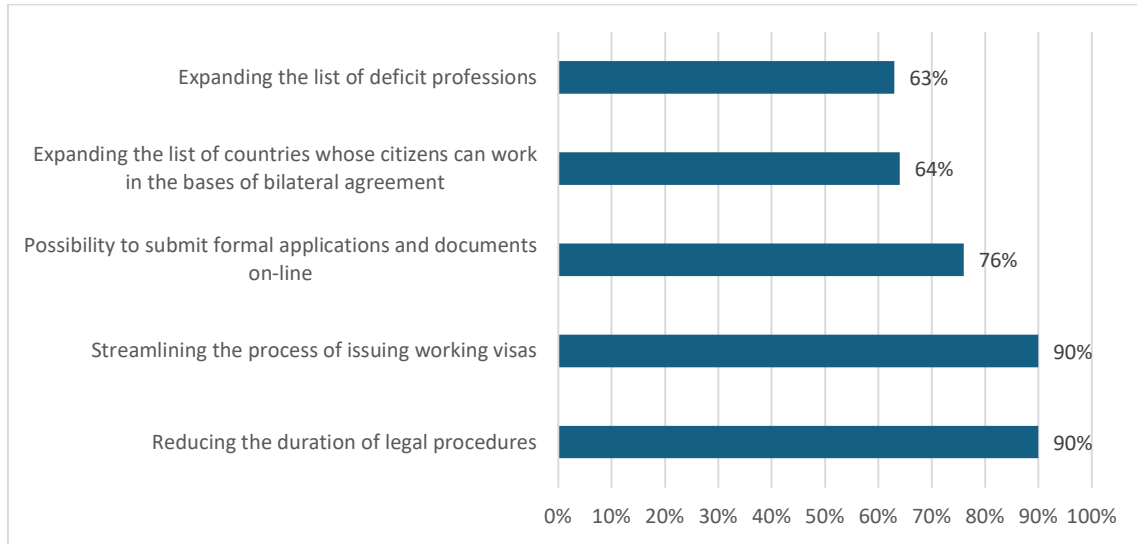
### 1.8. Gaps in supporting the employment of third-country nationals

The survey results indicate that companies have made efforts to implement various training and qualification measures to support the labour market integration of third-country workers. However, the areas with the most notable gaps include combating over-qualification and the use of digital tools. In terms of soft skills, companies perceive considerable gaps in providing additional language courses, computer literacy, and communication skills. For information and counselling, the most notable gaps are in the enhancement of labour market knowledge, counselling/mentoring/coaching, and IT programmes/applications.

While companies have made significant efforts in preventing discrimination and raising awareness about diversity, they perceive gaps in providing civic/social-cultural orientation courses.

Respondents believe that the priority for facilitating the employment of third-country nationals should be to reduce the length of legal procedures, streamline the process for issuing work visas and allow formal applications and documents to be submitted online (Figure 18).

**Figure 18: Proposed changes in regulations to facilitate third-country workers employment**



N=72

Source: Own calculations based on the survey

## 2. Recruit4Tomorrow - Rezultati raziskave o zaposlovanju tujcev iz tretjih držav v Sloveniji

Poročilo predstavlja rezultate raziskave o zaposlovanju tujcev iz tretjih držav na vzorcu slovenskih podjetij. V anketi, ki je bila izvedena med 22. aprilom in 30. junijem 2024, je sodelovalo 114 podjetij, ki so delno ali v celoti odgovorila na zastavljena vprašanja. Poročilo se začne s kratkim povzetkom o značilnosti vzorca, trenutnega stanja zaposlovanja tujih delavcev in delavcev iz tretjih držav, držav, iz katerih prihajajo, in njihovih plač. Drugi del obravnava prednosti in ovire zaposlovanja delavcev iz tretjih držav, njihovo zastopanost in vrzeli v podpori za njihovo zaposlovanje.

### 2.1. Značilnosti vzorca

Značilnosti podjetij, vključenih v vzorec, so prikazane v tabeli 1.

Tabela 1: Velikost podjetja, lastništvo in panoga

		Frekvenca	Delež
<b>Velikost (število delavcev) (N = 114)</b>	Manj kot 10	8	7 %
	11-50	21	18 %
	51-250	39	34 %
	251-500	18	16 %
	Več kot 500	28	25 %
<b>Lastništvo podjetja (N = 112)</b>	V družinski lasti Podjetje	16	14 %
	Domače zasebno Podjetje	48	43 %
	Domača javnost Podjetje	13	12 %
	Hčerinska družba MNE	32	29 %
	Drugo	3	2 %
<b>Panoga (N = 114)</b>	Gradbeništvo	11	10 %
	Gostinstvo in turizem	4	4 %

	Zdravstvo	6	5 %
	Predelovalne dejavnosti	37	32 %
	Sektor nafte in plina	1	1 %
	Avtomobilski sektor	4	4 %
	Sektor IKT	8	7 %
	Trgovina	8	7 %
	Druge storitve	35	31 %

Vir: Lastni izračuni na podlagi ankete

V letu 2023 je bila povprečna dodana vrednost na delavca med anketiranimi podjetji 57.274,1 evrov<sup>5</sup> letno. Porazdelitev dodane vrednosti na delavca med anketiranimi podjetji kaže na širok spekter s koncentracijo v srednjem območju. Največ podjetij, ki so sodelovala v raziskavi, poroča o dodani vrednosti v razponu med 20.001 in 40.000 evrov letno (slika 1). Teh podjetij je bilo v skupnem vzorcu 22 %.

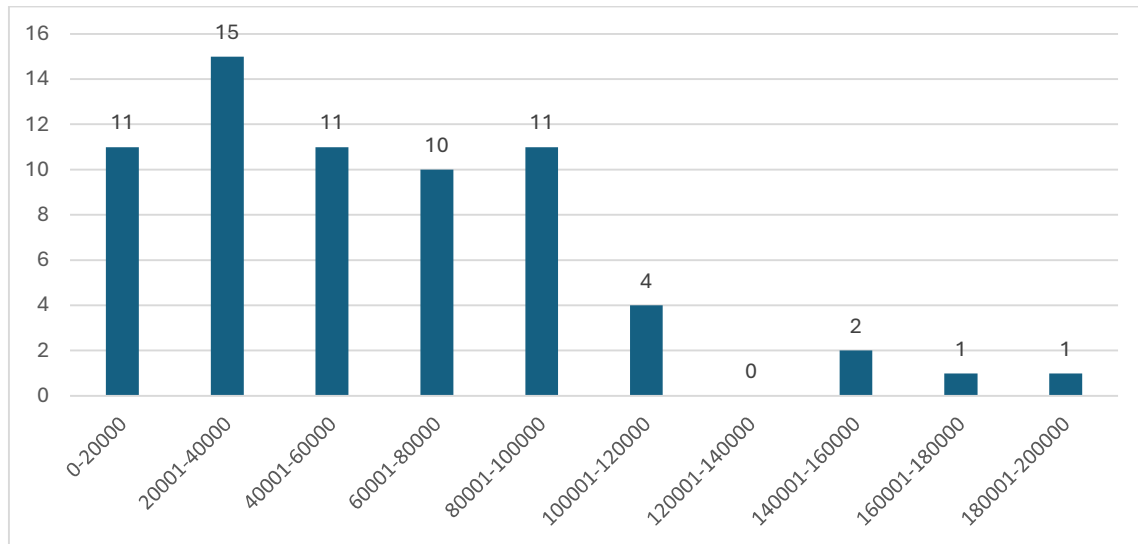
Povprečna bruto plača v podjetjih, ki so sodelovala v raziskavi, je v letu 2023 znašala 2.128 evrov<sup>67</sup> na mesec. Porazdelitev povprečnih bruto plač med anketiranimi podjetji kaže, da tri četrtine (77,8 %) podjetij v vzorcu poroča o povprečni mesečni bruto plači, ki je nižja od 2.638 evrov na mesec.

<sup>5</sup> Std. odstopanje: 41.949,95, min.: 5.000, maks.: 200.000

<sup>6</sup> Std. odstopanje: 1.054,2, min.: 100, maks.: 5.809

<sup>7</sup> Povprečna bruto plača v Sloveniji je leta 2023 znašala 2220,95 evra.

**Slika 1: Dodana vrednost na delavca (na leto, v EUR) v 2023**



N=66

Vir: Lastni izračuni na podlagi ankete

Raziskava je vključevala širok nabor anketirancev z različnih položajev v njihovih organizacijah (tabela 2). Značilnosti anketirancev kažejo na pomembno zastopanost kadrovskih služb, kar je v skladu s fokusom raziskave. Več kot dve tretjini sodelujočih je bilo žensk.

**Tabela 2: Položaj respondenta v podjetju**

	Frekvenca	Delež
Generalni direktor / direktor / član uprave	14	13 %
Vodja kadrovske službe	47	44 %
Kadrovski strokovnjak	30	28 %
Vodja pravne službe	2	2 %
Pravni strokovnjak	5	5 %
drugo	9	8 %

N=107

Vir: Lastni izračuni na podlagi ankete

Poleg tega imajo skoraj vsi anketiranci vsaj 5 let delovnih izkušenj, večina (73%) več kot 15 let na svojem področju (tabela 3).

**Tabela 3: Število let delovnih izkušenj anketirancev**

	<b>Frekvenca</b>	<b>Delež</b>
Manj kot 5 let	2	2 %
5-15 let	24	21 %
16-25 let	47	41 %
26-35 let	24	21 %
Več kot 35 let	12	11 %

N=109

Vir: Lastni izračuni na podlagi ankete

## 2.2. Zaposlovanje tujih delavcev: trenutno stanje

Večina, in sicer 81 % anketiranih podjetij je poročalo, da trenutno zaposlujejo tuje delavce (tabela 4). Skoraj dve tretjini vprašanih zaposluje tuje delavce iz držav, ki niso članice Evropske unije.

**Tabela 4: Zaposlovanje tujih delavcev**

	<b>Frekvenca</b>	<b>Delež</b>
Da	91	81 %
Ne	22	19 %

N=113

Vir: Lastni izračuni na podlagi ankete

Pri tistih podjetjih, ki trenutno ne zaposlujejo tujih delavcev (tabela 5), smo preverili tudi njihove načrte glede zaposlovanja tujih delavcev v prihodnosti. Od teh jih 62 % (13 anketirancev) namerava v prihodnosti zaposlovati tuje delavce. Natančneje, 9 od njih je navedlo, da nameravajo zaposliti delavce iz tretjih držav. Nasprotno pa jih 48 % (10 anketirancev) v prihodnje ne namerava zaposlovati tujih delavcev.

**Tabela 5: Strategija prihodnjega zaposlovanja tujih delavcev**

	Frekvenca	Delež
V prihodnje načrtujemo zaposlovanje tujih delavcev iz držav EU	4	19 %
V prihodnje načrtujemo zaposlovanje delavcev iz tretjih držav	9	43 %
V prihodnje ne načrtujemo zaposlovanja tujih delavcev	10	48 %

N=21

Vir: Lastni izračuni na podlagi ankete

### 2.3. Zaposlovanje delavcev iz tretjih držav (ne-EU).

Če pogledamo zaposlitve delavcev, ki niso državljani EU, je četrtnina vprašanih poročala, da je njihov delež manjši od 5 % vseh zaposlenih, pri petini podjetij pa med 6 % in 10 %. 16 % podjetij v vzorcu zaposluje več kot 20 % zaposlenih, ki niso državljani EU (tabela 6). Ta podjetja delujejo v gradbeništvu, predelovalni industriji in drugih storitvah (predvsem transport in logistika).

**Tabela 6: Delež delavcev iz tretjih držav v podjetjih**

	Frekvenca	Delež
Manj kot 5 % celotne delovne sile	28	25 %
6-10 %	23	20 %
11-15 %	8	7 %
16-20 %	2	2 %
Več kot 20 %	18	15 %
Ne vem točno	1	1 %

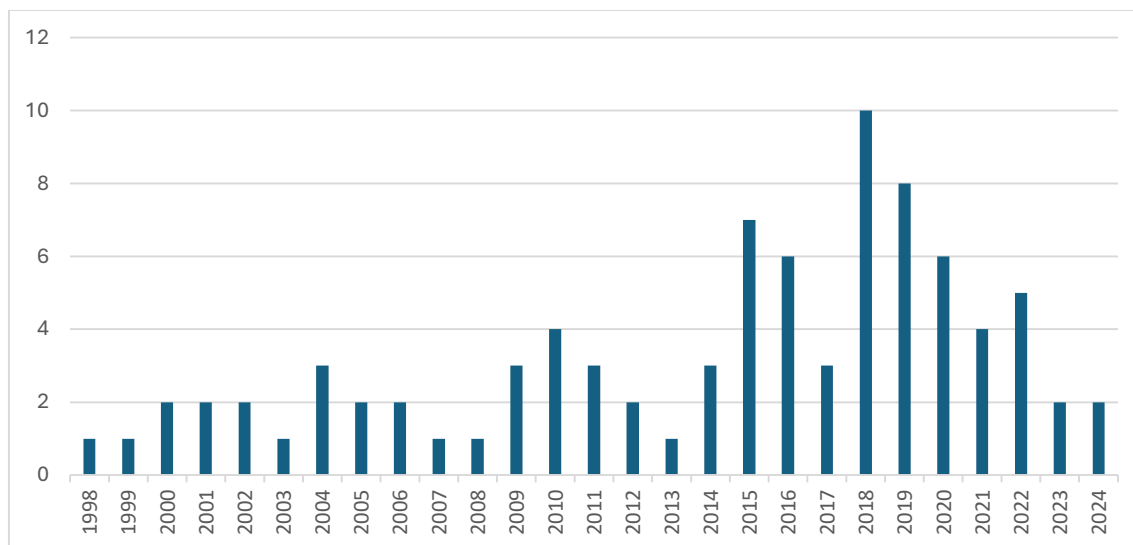
N=80

Vir: Lastni izračuni na podlagi ankete

Slika 2 prikazuje, da so nekatera slovenska podjetja v vzorcu pričela z zaposlovanjem državljanov tretjih držav že leta 1998. Znatno in opazen porast tovrstnega zaposlovanja je razviden od leta 2015. Podatki kažejo stalno povečevanje števila podjetij, ki zaposlujejo državljane tretjih držav, skozi leta s pomembnimi vrhovi v letih 2015, 2018 in 2019.



**Slika 2: Število podjetij, ki poročajo o pričetku zaposlovanja državljanov tretjih držav v obdobju med leti 1998 in 2024**



N=77

Vir: Lastni izračuni na podlagi ankete

Opisne statistike primerjave izobrazbene strukture zaposlenih iz tretjih držav v anketiranih podjetjih kažejo, da je precejšnja zastopanost tistih s srednjo in terciarno izobrazbo. V 40 anketiranih podjetjih, ki zaposlujejo te delavce in so odgovorili na vprašanje o izobrazbeni strukturi, jih je kar 47,05 % tistih s srednjo izobrazbo in 41,6 % tistih s terciarno izobrazbo. Več kot polovica vprašanih (57 %) meni, da je izobrazbena struktura delavcev iz tretjih držav primerljiva z izobrazbeno strukturo delavcev v podjetjih. Skoraj tretjina vprašanih (32 %) pa meni, da imajo delavci iz tretjih držav nižjo povprečno stopnjo izobrazbe (tabela 7). Omeniti velja tudi, da je manj kot tretjina delavcev iz tretjih držav žensk. Starostna struktura delavcev iz tretjih držav v anketiranih podjetjih kaže, da jih je večina starih od 31 do 40 let.

**Tabela 7: Primerjava izobrazbene strukture delavcev iz tretjih držav z ostalimi**

	Frekvenca	Delež
Primerljivo	39	57 %
V povprečju imajo delavci iz tretjih držav nižjo izobrazbo.	22	32 %
V povprečju imajo delavci iz tretjih držav višjo izobrazbo.	6	9 %
Težko je odgovoriti	1	1 %

N=68

Vir: Lastni izračuni na podlagi ankete

Več kot tretjina delavcev iz tretjih držav je zaposlenih za proizvodna dela, sledijo strokovno-tehnična in storitvena dela (Tabela 8).

**Tabela 8: Vrste delovnih mest delavcev iz tretjih držav**

	<b>Frekvenca</b>	<b>Delež</b>
Storitve (prodaja, osebna nega, zaščitne storitve, osebne storitve itd.)	16	17 %
Strokovna in tehnična dela (zdravstvene storitve, pravne in druge strokovne storitve, strokovne storitve na področju znanosti in tehnike itd.)	26	27 %
Delo v proizvodnji	35	36 %
Osnovna dela (čistilni servisi, kmetijske, ribiške in gozdarske storitve, pomoč pri pripravi hrane itd.)	11	11 %
Vodstveno delo	7	7 %
Drugo	2	2 %

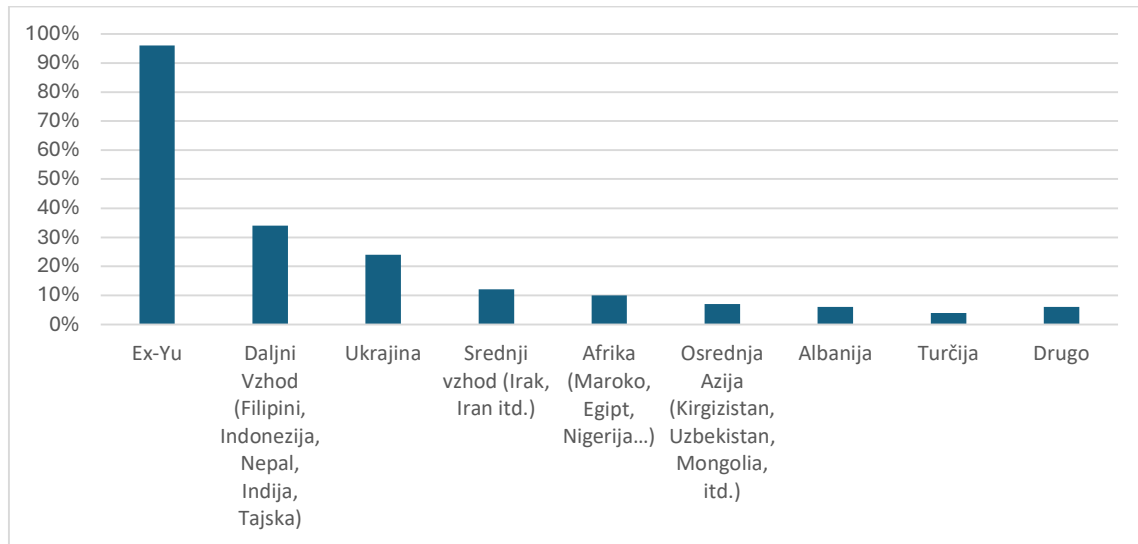
N=97

Vir: Lastni izračuni na podlagi ankete

#### **2.4. Izvor delavcev iz tretjih držav**

Rezultati raziskave kažejo, da delavci iz tretjih držav prihajajo predvsem iz držav nekdanje Jugoslavije (Bosna in Hercegovina, Srbija, Črna gora, Severna Makedonija) in Kosova. Poleg tega veliko delavcev iz tretjih držav prihaja iz držav Daljnega vzhoda, kot so Filipini, Indonezija, Nepal in Tajski, pa tudi iz Ukrajine (slika 3).

**Slika 3: Izvor delavcev iz tretjih držav**

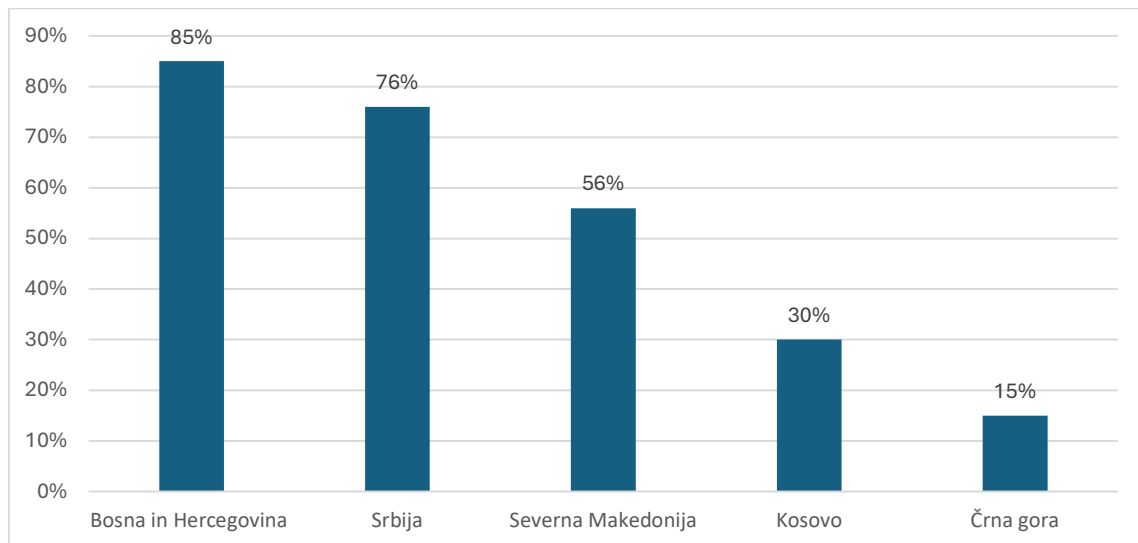


N=68

Vir: Lastni izračuni na podlagi ankete

Na vprašanje, iz katerih držav nekdanje Jugoslavije prihajajo delavci, je bil najpogostejši odgovor Bosna in Hercegovina (Slika 4), ki so jo anketiranci navedli tudi kot prvo najpogostejšo državo.

**Slika 4: Izvor delavcev tretjih držav iz nekdanjih jugoslovanskih držav, ki niso članice EU**



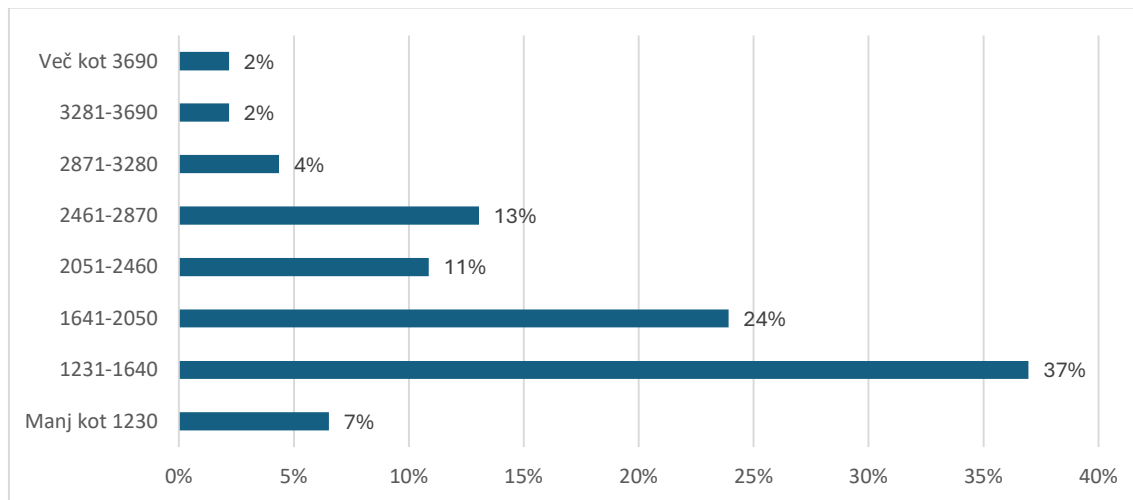
N=54

Vir: Lastni izračuni na podlagi ankete

## 2.5. Plače delavcev iz tretjih držav

Povprečna mesečna bruto plača delavcev iz tretjih držav v anketiranih podjetjih v letu 2023 znašala 1893,9 evra.<sup>8</sup> Povprečna bruto plača delavcev iz tretjih držav je za skoraj petino nižja od povprečne plače v podjetjih, ki so bila vključena v vzorec. Slika 5 prikazuje porazdelitev povprečnih bruto plač (na mesec, v EUR) izplačanih delavcem iz tretjih držav v anketiranih podjetjih.

**Slika 5: Porazdelitev podjetij glede na povprečno bruto plačo delavcev iz tretjih držav (na mesec, v EUR)**



N=46

Vir: Lastni izračuni na podlagi ankete

Kljub razliki v povprečnih plačah večina anketirancev meni, da so plače delavcev iz tretjih držav primerljive s plačami drugih zaposlenih (tabela 9), kar nakazuje na to, da je več delavcev iz tretjih držav zaposlenih na delovnih mestih, kjer prejema minimalno plačo.

**Tabela 9: Kvalitativna primerjava povprečnih bruto plač delavcev iz tretjih držav z drugimi delavci v istem podjetju**

	Frekvenca	Delež
Nižje	4	7 %
Primerljive	50	88 %
Višje	1	2 %
Ne vem	2	4 %

N=57

Vir: Lastni izračuni na podlagi ankete

<sup>8</sup> Std. odstopanje: 659,76, min: 840, maks: 4,103

Vsa anketirana podjetja so poročala, da niso prejela nobenih subvencij za zaposlovanje delavcev iz tretjih držav, do katerih drugi delavci niso bili upravičeni.

## 2.6. Prednosti in ovire pri zaposlovanju delavcev iz tretjih držav

Glavne prednosti, ki jih podjetja vidijo pri zaposlovanju državljanov tretjih držav, so zaposlovanje delavcev z zaželenimi kompetencami, stabilnost (razpoložljivost) delovne sile zaradi nihanj prodaje (naročil) in raznolikost, ki lahko pripomore k rasti podjetja. Znižanja stroškov povečini ne dojemajo kot koristi iz naslova zaposlovanja delavcev iz tretjih držav (slika 6).

**Slika 6: Prednosti zaposlovanja delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**

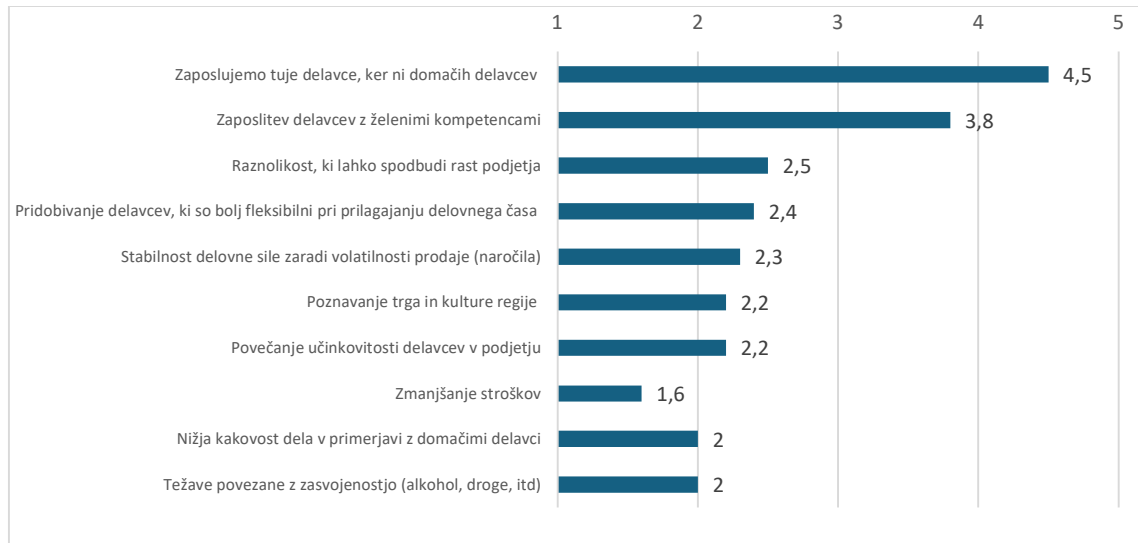


N=21

Vir: Lastni izračuni na podlagi ankete

Na podlagi raziskave in odgovorov anketirancev lahko sklepamo, da je eden glavnih razlogov za zaposlovanje tujih delavcev pomanjkanje domačih delavcev in pridobivanje delavcev z ustreznimi kompetencami (Slika 7).

**Slika 7: Razlogi za zaposlovanje delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**

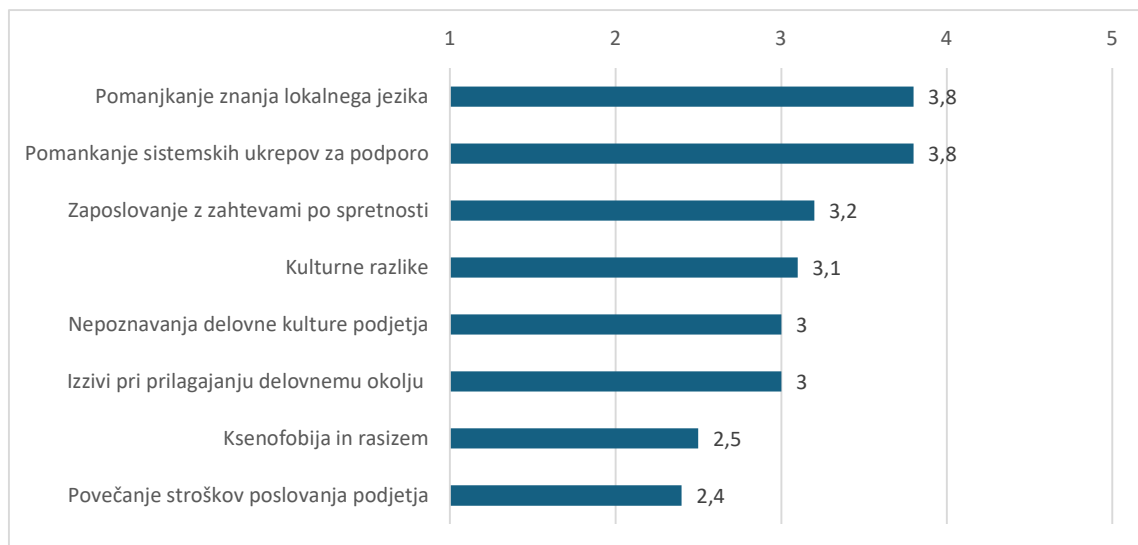


N=58

Vir: Lastni izračuni na podlagi ankete

Anketiranci kot največji možni težavi pri zaposlovanju delavcev iz tretjih držav ocenjujejo nepoznavanje lokalnega jezika in pomanjkanje sistemskih podpornih ukrepov (slika 8).

**Slika 8: Morebitne težave v zvezi z zaposlovanjem delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**

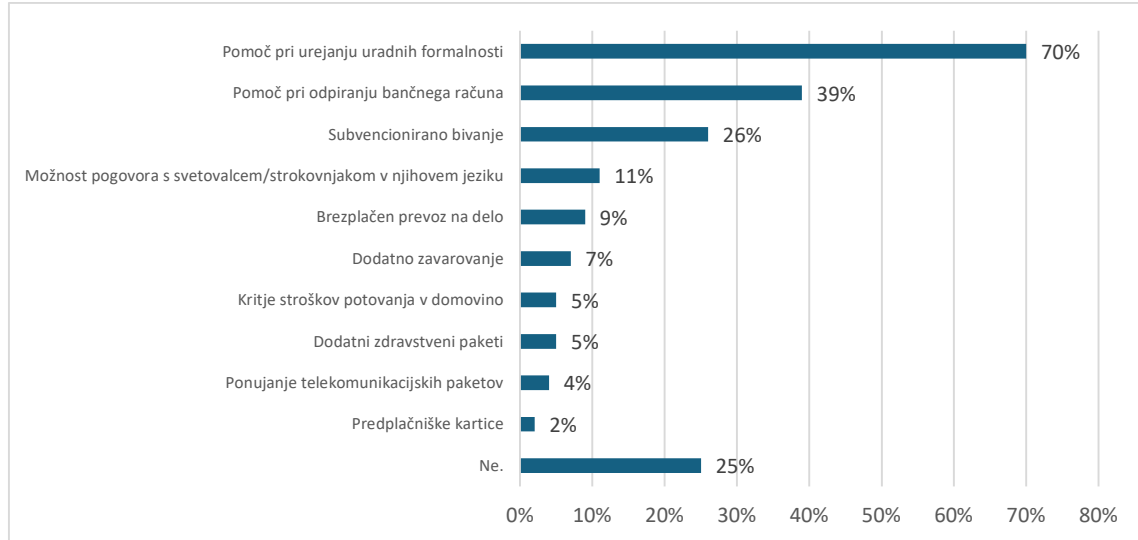


N=83

Vir: Lastni izračuni na podlagi ankete

Kar zadeva ugodnosti, ponujene delavcem iz tretjih držav, 70 % anketiranih podjetij delavcem iz tretjih držav ponuja pomoč pri uradnih formalnostih, 39-% pomoč pri odprtju bančnega računa, 26 % pa subvencionirano namestitev (slika 9).

**Slika 9: Ugodnosti za delavce iz tretjih držav**

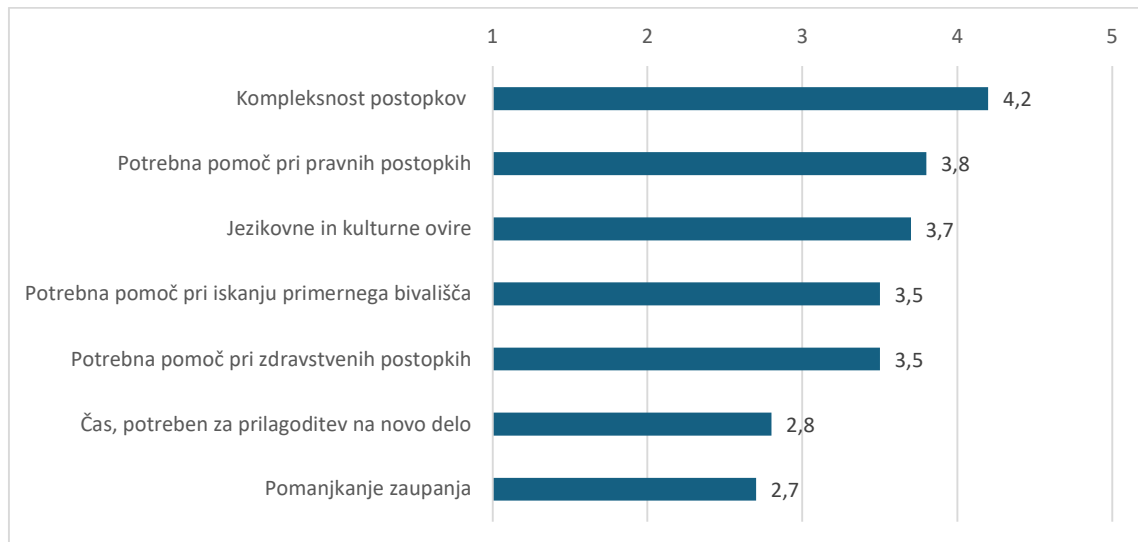


N=57

Vir: Lastni izračuni na podlagi ankete

Rezultati raziskave kažejo, da so zapleteni pravni postopki in potreba po pomoči delavcem iz tretjih držav pri pravnih postopkih najpomembnejši oviri pri zaposlovanju delavcev iz tretjih držav (slika 10). Pomembni izzivi so tudi jezikovne in kulturne ovire ter potreba po iskanju primerne namestitve in vodenju postopkov, povezanih z zdravjem. Anketiranci se povečini ne strinjajo, da bi čas, potreben za prilagajanje, in pomanjkanje zaupanja predstavljali pomembni oviri.

**Slika 10: Ovire pri zaposlovanju delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**

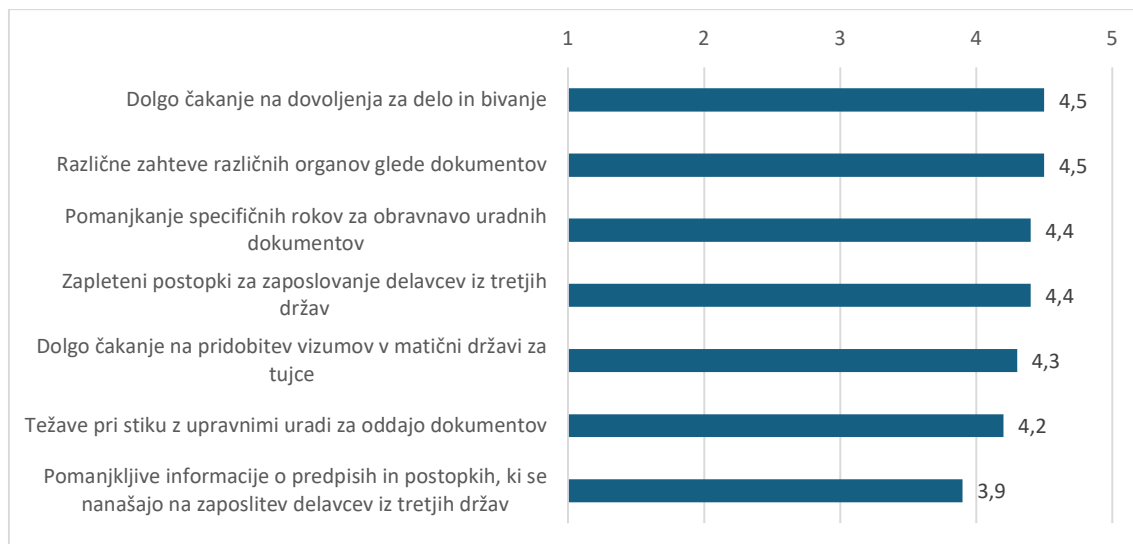


N=83

Vir: Lastni izračuni na podlagi ankete

Obstaja visoko strinjanje glede širokega nabora formalnih ovir, povezanih s pravnimi dejavnostmi (slika 11). Najbolj pereče so dolgotrajni postopki za pridobitev dovoljenja za delo in bivanje, izkušnje, da imajo različni organi različne zahteve glede dokumentov, neustreznost rokov za obravnavo uradnih dokumentov ter dolge čakalne dobe za pridobitev vizuma v matični državi za delavce iz tretjih držav.

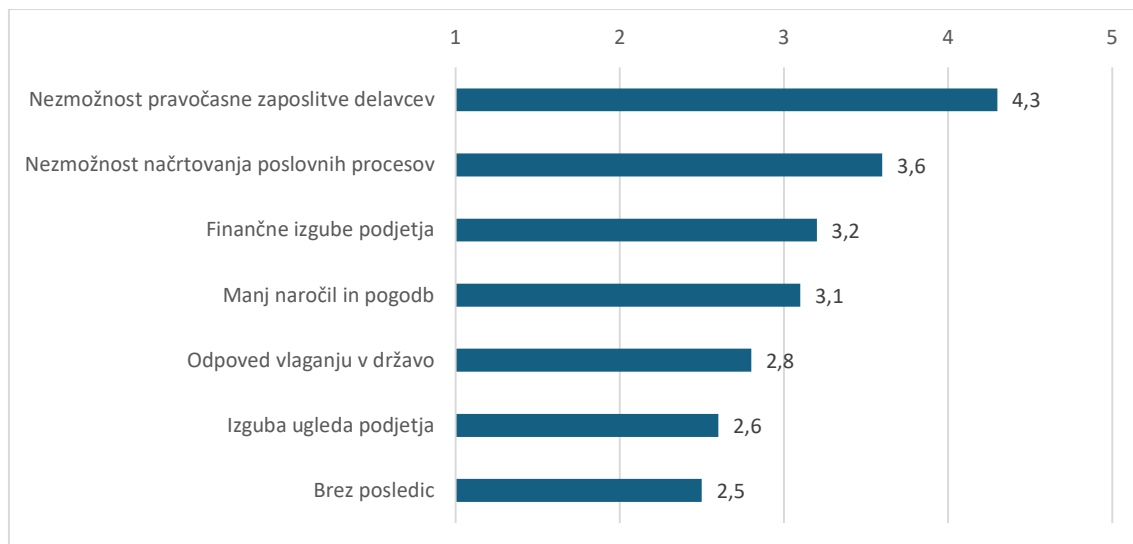
**Slika 11: Formalne ovire, povezane s pravnimi dejavnostmi (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**



N=70

Vir: Lastni izračuni na podlagi ankete

**Slika 12: Posledice ovir, s katerimi se srečujejo podjetja pri zaposlovanju delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**



N=67

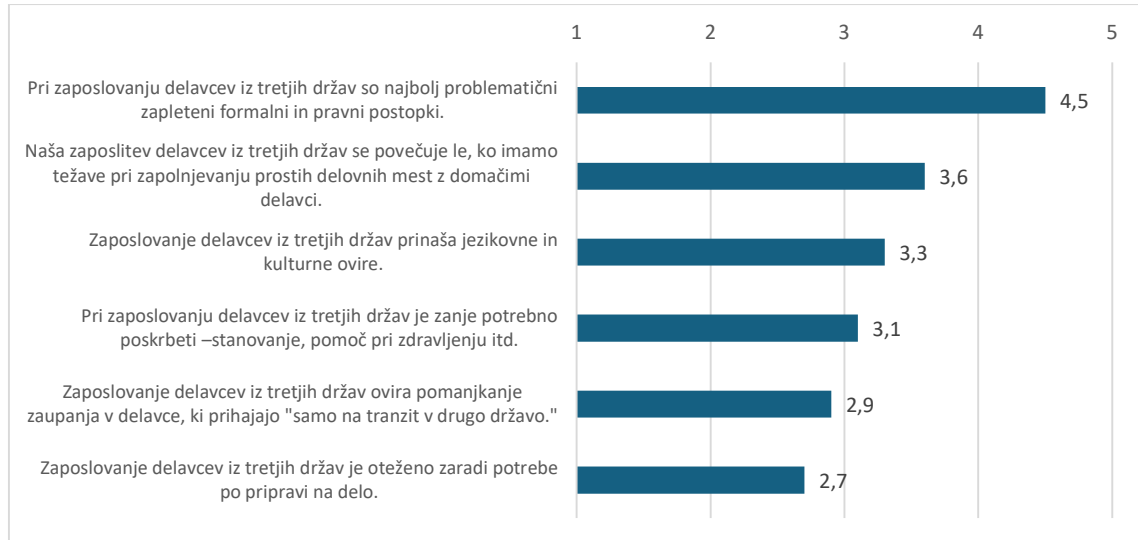
Vir: Lastni izračuni na podlagi ankete

Posledice ovir, s katerim se soočajo podjetja pri zaposlovanju delavcev iz tretjih držav, se kažejo v tem, da podjetja ne morejo pravočasno zaposliti delavcev, imajo težave z načrtovanjem



poslovnega procesa ter včasih tudi manj naročil in pogodb (Slika 12). Najbolj problematičen vidik zaposlovanja delavcev iz tretjih držav so zapleteni formalno-pravni pogoji (slika 13).

**Slika 13: Ocena izjav o zaposlovanju delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**

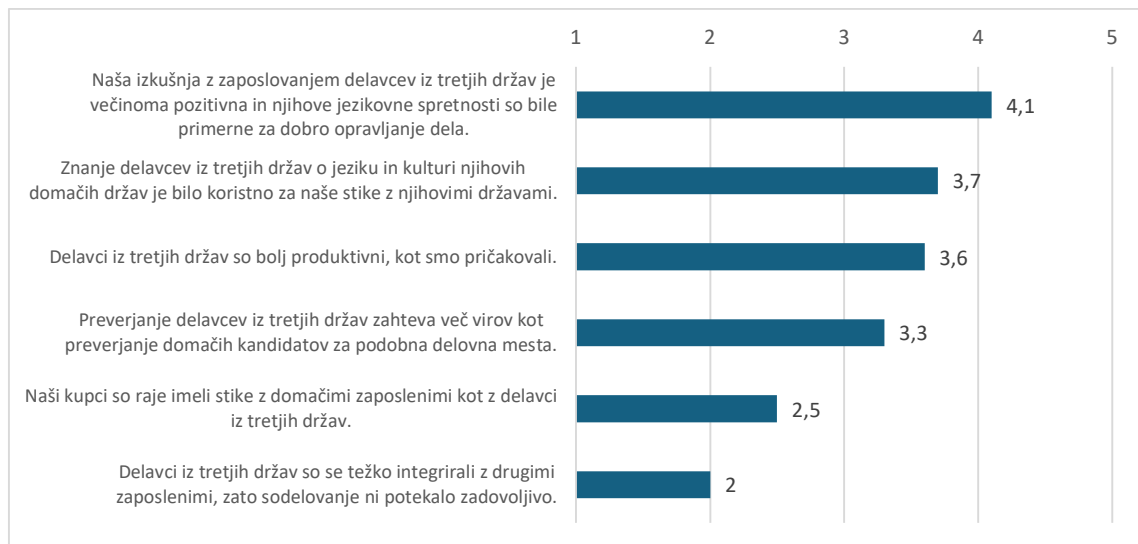


N=57

Vir: Lastni izračuni na podlagi ankete

Na splošno pa so izkušnje z zaposlovanjem delavcev iz tretjih držav večinoma pozitivne in njihovo jezikovno znanje je zadostovalo za dobro opravljanje dela (slika 14). Podjetja se na splošno ne strinjajo, da je bilo delavce iz tretjih držav težko vključiti v druge zaposlene.

**Slika 14: Izkušnje z zaposlovanjem delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**



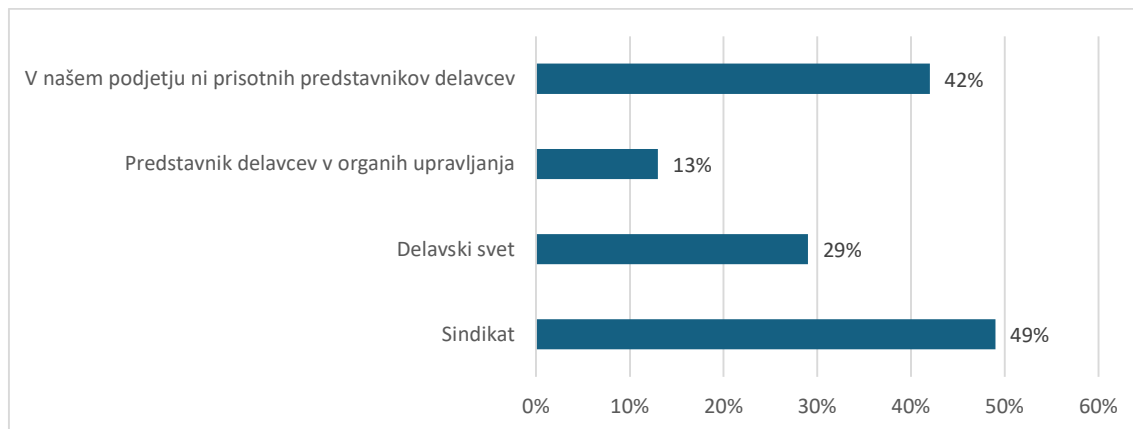
N=56

Vir: Lastni izračuni na podlagi ankete

## 2.7. Sindikati in participacija delavcev pri upravljanju

Najpogostejša oblika delavskega zastopstva v analiziranih podjetjih je sindikat. Zanimivo je, da je v vzorcu skoraj polovica podjetij (42 %), ki nimajo nobene oblike delavskega predstavnštva (Slika 15).

**Slika 15: Sindikati in participacija delavcev pri upravljanju**

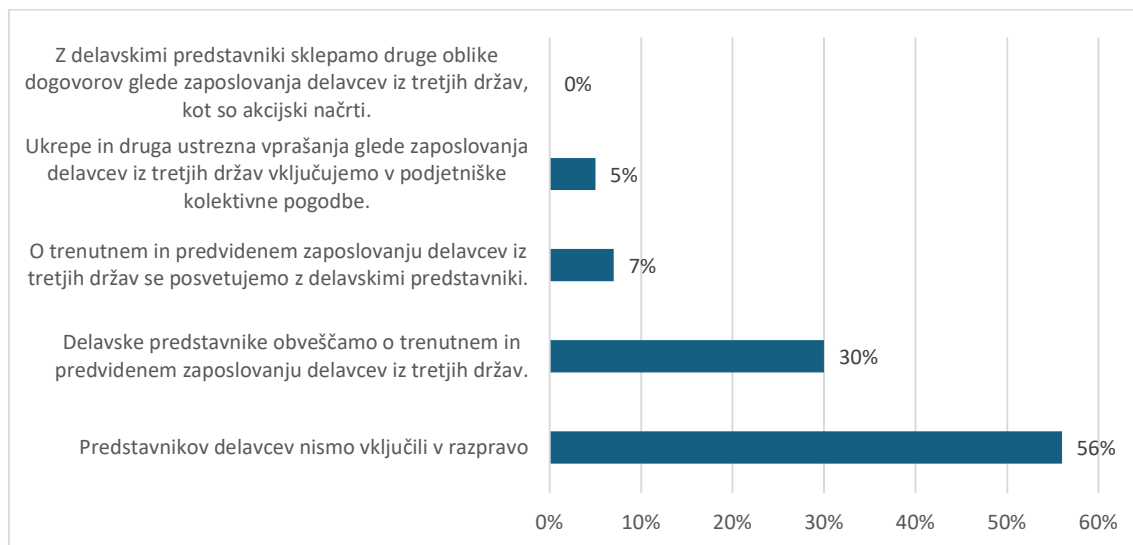


N=83

Vir: Lastni izračuni na podlagi ankete

Več kot polovica anketirancev, ki imajo v svojem podjetju organiziran sindikat, delavski svet ali neko drugo obliko sodelovanja delavcev pri upravljanju, predstavnikov delavcev ni vključila v razpravo o izzivih, ki jih predstavljajo delavci iz tretjih držav (slika 16). Zelo podobna je situacija, ko gre za njihove prihodnje načrte (slika 17).

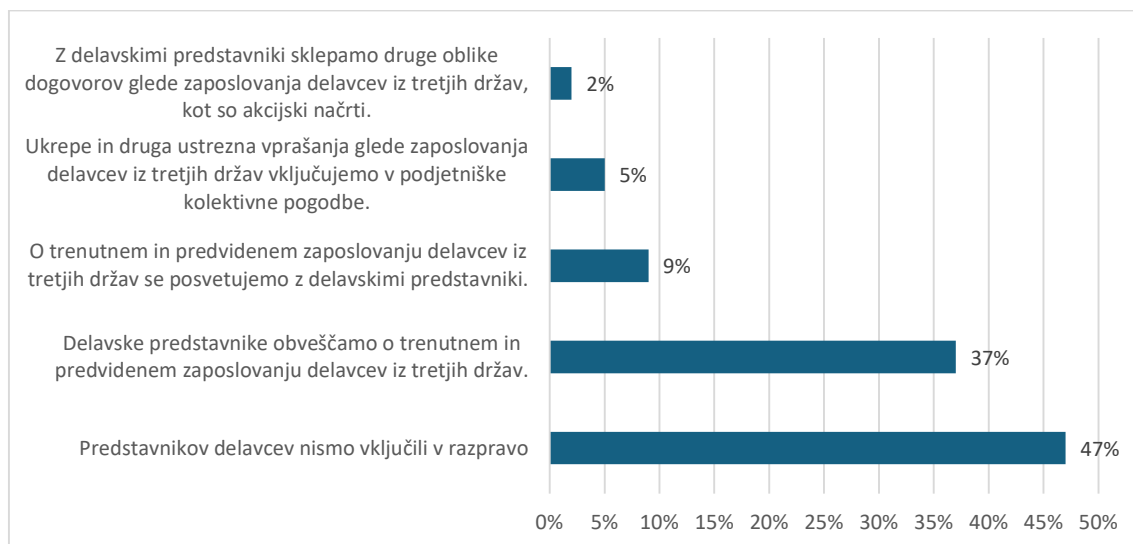
**Slika 16: Soočanje z izzivi, povezanimi z delavci iz tretjih držav**



N=43

Vir: Lastni izračuni na podlagi ankete

**Slika 17: Načrti za spopadanje z izzivi, povezanimi z delavci iz tretjih držav**



N=43

Vir: Lastni izračuni na podlagi ankete

Poleg tega več kot polovica (54 %) vprašanih ne pozna razprav socialnih partnerjev o zaposlovanju in izzivih, povezanih z delavci iz tretjih držav, na sektorski in nacionalni ravni. Nekaj več kot četrtina (27 %) vprašanih je seznanjenih z razpravami, vendar ne ve, za kaj gre.

## 2.8. Vrzeli pri podpiranju zaposlovanja državljanov tretjih držav

Rezultati raziskave kažejo, da so si podjetja prizadevala za izvajanje različnih ukrepov na področju usposabljanja in pridobivanja kvalifikacij za podporo vključevanju delavcev iz tretjih držav na trg dela. Vendar področja z najbolj opaznimi vrzeli vključujejo ukrepe za boljše usklajevanje potreb na trgu dela s kvalifikacijami delavcev iz tretjih držav in uporabo digitalnih orodij. Na področju mehkih veščin podjetja zaznavajo precejšnje vrzeli pri zagotavljanju dodatnih jezikovnih tečajev, računalniške pismenosti in komunikacijskih veščin. Pri informiranju in svetovanju so najbolj opazne vrzeli pri krepitvi znanja o trgu dela, svetovanju, mentorstvu, inštruiranju in IKT programih oz. aplikacijah.

Čeprav so si podjetja močno prizadevala za preprečevanje diskriminacije in ozaveščanje o raznolikosti, zaznavajo vrzeli pri zagotavljanju tečajev državljanske/socialno-kulturne orientacije. Anketiranci menijo, da bi morala biti prednostna naloga pri olajšanju zaposlovanja državljanov tretjih držav skrajšanje trajanja pravnih (formalnih) postopkov, poenostavitev postopka za izdajo delovnih vizumov in omogočanje spletne oddaje uradnih vlog in dokumentov (slika 18).

**Slika 18: Predlagane spremembe predpisov za lažje zaposlovanje delavcev iz tretjih držav (1 = popolnoma se ne strinjam, 5 = popolnoma se strinjam)**



N=72

Vir: Lastni izračuni na podlagi ankete