LABOUR INT III

Labour Market and Foreign Nationals in Italy and Apulia

Research Report

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Preface

For the European Union, migration is as central on the political agenda as it is on the social one. Inclusion policies are necessary to govern a complex phenomenon that shows no sign of diminishing, given the many armed conflicts as well as the precarious living conditions and expectations of people from North African and Middle Eastern countries.

Over the past decade, public opinion has taken shape around the idea that the erosion of welfare guarantees and a perceived decline in public safety are the result of substantial migratory flows—especially into first-entry countries such as Italy, which borders the Mediterranean.

These are often specious arguments, fuelled by certain political forces, and readily countered in light of some quantitative–qualitative indicators, such as fertility rates across the European Union and trends in post-COVID-19 Europe.

The European Commission monitors fertility, and the data point to a demographic alarm bell. With the exception of Bulgaria and Hungary, the rest of the EU reports a decline, with the European average at 1.38 children per woman. This downward trend has continued since 2000 and, over such a time span, has meant a shrinking population, given that the replacement rate required to keep population size stable is at least 2.1 children per woman.

COVID-19 has also markedly changed Europeans' willingness to take up certain job vacancies. Young people increasingly prefer to wait or move elsewhere rather than accept work that does not meet their expectations and aspirations.

Taken together, these two factors are producing social desertification in parts of Europe. Southern Italy, for example, presents a discouraging picture: a negative net balance of 116,000 residents who have moved to central and northern regions. Among those leaving, young adults aged 25–34—often university graduates—predominate. The main foreign destinations are Germany, the United Kingdom, France and Switzerland.

After a peak in 2014, Italy's population has fallen from 60.8 million to 58.97 million. Whereas the previous decade had seen growth—thanks to longer life expectancy and EU and non-EU migration (particularly from Central Europe)—those demographic gains have been wiped out by the low fertility rate.

Ordinarily, such indicators should lead us to recognise that regular, regulated migration flows are necessary to sustain the welfare state and the production system. Indeed, the Italian Government alone, for the three-year period 2023–2025, has provided for a "Decreto Flussi" authorising 450,000 new entries, to be allocated primarily across three areas: personal and care services; seasonal subordinate work; and non-seasonal and self-employment. We are speaking about home care workers and domestic workers, the HORECA sector, and various self-employment roles. Other European countries generally do not use a "decreto flussi" mechanism; rather, they rely on visa systems and bilateral agreements. From these data a critical point clearly emerges: the mutual recognition of qualifications and skills between EU and non-EU countries remains limited, which in practice channels many newcomers into low-skilled jobs regardless of their actual curriculum.

Hence the importance of European inclusion policies, which are essential to respond to the expectations of migrants who want to settle in Europe, to public opinion, and to the needs of governments—often out of step with the migration stances of the political forces that compose them. In this perspective, the AMIF—Asylum, Migration and Integration Fund—had a budget of €7.5 billion in the 2014–2020 programming period, increased by 32% in the current 2021–2027 cycle to €9.88 billion.

Inclusion must be articulated in terms of first reception and support for asylum applications; once these phases have been completed, it is necessary to provide a system of health protection and then activate active labour-market policies so that non-EU citizens become fully integrated into the social context they have chosen, contributing—on a par with EU citizens—to the overall social and economic development of Europe and, in our case, of Italy.

Our research—part of a broader project—is funded precisely by this instrument and aims to map the distribution of migration flows in Italy, with a focus on Apulia, and to identify which production sectors currently need staff. We did not stop there: based on the meetings and focus groups carried out, we have also planned follow-up activities in training and in business start-up support.

LabourInt III—this project's third iteration—has shown its effectiveness in addressing the issues outlined above. One enjoys the fruits of democracy only when one can fully exercise the rights—and assume the duties—that come with it. Being part of a community, taking part in the social and economic development of society as well as of the individual, means finding one's place in society; one can contribute by developing the community in which one lives and, by extension, society and its economy—through work. Our aim is to equip project participants with the necessary skills, providing, as far as possible, practices which—if successful—can be disseminated.

Alterations and repairs of garments, warehouse operations, and training for the creation of a cooperative are the practical outcomes of this study. The vocational courses last 140 hours, corresponding to the recognition of two units of competence under the rules adopted by the Apulia Region for the Regional Catalogue of Occupational Profiles. The third course—more than a course, a pathway—combines training with business start-up support and lasts 80 hours.

The active labour-market measures we intend to offer beneficiaries can be summarised in three pathways:

Training

Training plus activation of extracurricular internships

Training aimed at business creation.

Given the nature of the project, building a stakeholder network is essential. In this sense, the participation of key labour-market actors is crucial. Indeed, the project involves both the confederal trade-union organisations and the employers' associations, which are already shaping—and will continue to shape—labour-market policies in defining the above pathways.

The research is analytical and comprises desk research and fieldwork. Like a camera that zooms from the general to the particular, it explores the foreign population living in Italy, assesses their employability in relation to firms' needs, and then zooms in on the Apulian context.

The statistical investigation set out to define local labour-demand needs through a survey that involved both migrant communities and businesses and their organisations. Only after processing the information gathered did we proceed to identify the sectors in which to design the training pathways. We consider this bottom-up approach the most effective way to avoid designing training based on subjective assumptions that may not match reality.

Accordingly, our work was organised in two phases: research and the definition of training pathways—entrusted to the Fondazione Centro Studi e Archivio Storico Rita Maierotti—and the design and delivery of the training and the associated active labour-market measures listed above—entrusted to Fondazione SMILE Puglia. Collaboration between the two entities was very close and became complete once the project had started, when the merger by incorporation of the two foundations into Fondazione SMILE Puglia was finalised, establishing a single governance structure for the assigned work packages.

The Italian labour market as it relates to non-EU citizens is no minor matter, especially in light of the phenomenon of the “working poor”—workers who, despite being employed, remain on low incomes. Unfortunately, in recent years this has increasingly affected Italian citizens as well, creating barriers to social mobility.

Social policies, valuing human capital in terms of skills, and regulating the labour market—this seems to us the only coherent recipe for addressing such complex issues. We must support parenthood; retain and expand human capital by enriching it with skills aligned with technological change; and regulate the labour market to make vacancies attractive in terms of earning potential.

Last but not least, it is vital to adopt an industrial policy that encourages young people—including those who have studied or worked abroad—to remain within national borders, and, ideally, within Apulia, so they can put their skills to work professionally.

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Introduction

Over the past forty years, Italy has undergone a radical transformation: from a country traditionally marked by emigration, it has progressively established itself as one of the main destinations for immigration in Europe. This process has significantly reshaped the national social and productive structure, to the point that the presence of foreign nationals can no longer be interpreted as an emergency phenomenon, but rather as a structural and stable component of the labour market and of society.

The growing participation of foreign workers has been most evident in several strategic productive sectors. Agriculture, construction, logistics and personal care services are the areas in which migrant labour is most strongly represented – often to an indispensable degree. In recent years, however, there has also been a gradual entry of foreign nationals into manufacturing, skilled trades and activities requiring mid-level technical competences. This points to a slow but meaningful diversification of migrant presence within Italy's productive fabric.

At the same time, critical issues remain clear. Data show that foreign workers are often confined to the lower tiers of the labour market, characterised by contractual precariousness, low wages, greater exposure to risks of exploitation and frequent breaches of health-and-safety regulations. Added to this are structural barriers such as linguistic and cultural obstacles, the difficulty of recognising and valuing educational qualifications and skills acquired in countries of origin, and insufficient coordination between labour demand and supply. These factors slow down integration pathways and limit the social mobility of migrant workers, trapping them in marginal segments.

The Italian picture must be read within a broader context of demographic crisis and an evolving European labour market. Low birth rates and population ageing make it increasingly difficult to ensure generational replacement in the workforce. In this scenario, the presence of foreign nationals appears not only as an opportunity but as a genuine necessity to sustain the competitiveness and sustainability of the national economic system.

Within this general framework, Apulia is a particularly interesting case study. A Mediterranean frontier region – historically a place of arrival and transit – Apulia has, over the past two decades, also become a territory of stable settlement for numerous foreign communities. Its economy, characterised by the weight of agriculture and of micro and small enterprises, has heightened demand for foreign labour, especially seasonal, often against a backdrop of growing unwillingness among the native workforce to fill certain roles.

The foreign presence in Apulia has thus consolidated over time, taking on a crucial role both for the survival of entire productive sectors and for the demographic and social resilience of many areas. Yet, alongside opportunities, contradictions and criticalities also emerge here: phenomena of *caporalato* (gangmastering) and exploitation, a shortage of housing and social policies, difficulties in accessing training pathways, and mismatches between firms' needs and workers' competences.

This report aims to provide an in-depth analysis of the dynamics shaping the relationship between migration and the labour market in Italy, with a particular focus on Apulia. The purpose is twofold: on the one hand, to reconstruct – through quantitative data – the main employment trends and the sectors that most employ migrant labour; on the other, to bring out – through qualitative enquiries and interviews with key territorial stakeholders – perceptions, critical issues and prospects for improving the system of socio-occupational inclusion. In doing so, the report seeks to contribute to public and institutional debate, offering evidence to inform more effective policies – capable of valuing the presence of foreign workers as an essential resource for the future of both Apulia's and Italy's labour markets.

Methodological note

This report adopts a mixed-methods (qualitative – quantitative) approach with the aim of providing an integrated reading of the phenomena related to the presence and role of foreign workers in the Italian and Apulian labour market. The analysis is based on the cross-referencing of statistical data with qualitative evidence gathered in the field, so as to offer both an objective and an interpretive picture of the dynamics observed.

Quantitative sources

The quantitative component draws on official, well-established sources, including:

ISTAT (Labour Force Survey, censuses, demographic data), for information on employment, unemployment, inactivity and territorial distribution.

INPS and INAIL, for data on active employment positions, contract types, workplace injuries and social-security aspects.

Unioncamere – Excelsior Information System, for employment forecasts and firms' stated training needs.

Ministry of the Interior and Ministry of Labour, for information on migration flows, residence permits and regulatory dynamics.

Regional and local sources (Labour Market Observatories, public employment services, Apulian research reports), to capture territorial specificities.

The data were analysed from a comparative perspective between Italy and Apulia, in order to highlight convergences and divergences between the national and regional picture.

Qualitative sources

The qualitative component was developed using several collection and analysis techniques:

Focus groups with representatives of third-sector organisations and reception actors, useful for reconstructing direct experiences and perceptions regarding reception pathways and labour-market inclusion.

In-depth interviews with key informants (employers' associations, business owners), providing a close look at critical issues and good practices from firms' perspective.

Document analysis of reports, projects and studies already carried out on the topic at national and regional level.

The qualitative sources made it possible to give voice to the actors involved, enriching the numerical data with reflections, narratives and concrete examples.

Analytical techniques

On the quantitative side, descriptive and comparative elaborations were conducted (frequencies, shares, rates), with attention to gender, age, sector of employment and contract type.

On the qualitative side, testimonies were analysed thematically, identifying the key themes (critical issues, needs, good practices, prospects).

Limitations and potential

The mixed-methods nature of the work allows for a nuanced, complex picture, but it also entails some limitations: the availability of up-to-date statistical data may vary by source; qualitative contributions, while rich and meaningful, are not statistically representative, but offer interpretive insights and lines of reading.

Nevertheless, the integration of numbers and first-hand voices makes this report a useful tool not only for describing the phenomenon but also for informing reflection and public policy.

Chapter 1

Foreign Nationals in Italy: Living and Working Conditions

1.1 A preliminary note on new human mobility

In 2025, with over 5 million resident foreign citizens and around 2 million new citizens (naturalised, having obtained citizenship), Italy confirms itself as a country with strong migratory attractiveness. Overall, immigrants account for more than 10% of the national population. Considering also that foreign workers contribute 9% of national GDP, it can be stated without hesitation that we are now facing a stable, structural phenomenon that involves all spheres of the country's social life. Yet we are witnessing an increase in episodes of xenophobia and stigmatisation fuelled by political slogans and soundbites (Ambrosini 2020) whose sole purpose is to criminalise immigration and to reinforce border-control policies and the management of incoming flows. The prevailing orientation is to conceive of the phenomenon as an emergency and a social ill to be countered with every instrument of migration policy.

In the scientific field, the introduction of the new mobility paradigm (Sheller, Urry 2006) has helped overturn many of the assumptions and distorted conceptions ascribed to migration, even though, unfortunately, these still underpin the action of many national governments in the Western context. The new paradigm invites us to conceive of migrations not as exceptional phenomena or as responses to specific problems, but as one of the forms of the broader phenomenon of mobility that involves everyone (as tourists, commuters or transnational workers). The study of contemporary mobility processes, in fact, refrains from adopting deterministic interpretive keys that associate human movements solely with constraint or flight, recognising individuals' autonomy, the dynamic and processual nature of movements, and the role of systems of resources, constraints and opportunities. It also reconceptualises the relationship that individuals forge with places of arrival, transit, consumption or settlement: the pluralisation of forms of movement confirms the assumption that migration does not immediately lead to unilateral assimilation into host societies (Glick-Shiller et al. 1992), but to the dynamic construction of transversal social fields that cut across the rigid delineation of national borders (Riccio 2019).

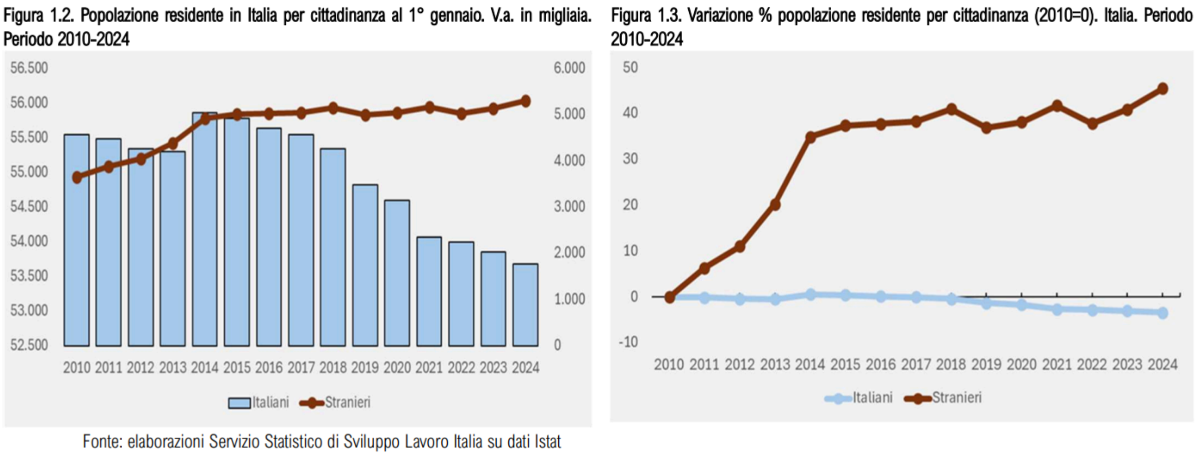
In this sense, governments and territories are called upon to intervene structurally in the phenomenon, with migration-policy frameworks that are coherent over time and extended across space. Moving beyond the narrow vision of "methodological nationalism" in favour of "transnationalism" (Vertovec 2009) requires rethinking action plans and designing policy interventions that are not occasional and context-bound, but long-term and broad in scale. There cannot, therefore, be an effective migration policy that lacks awareness of the trans-scalar nature of human mobility (Mezzadra, Neilson 2013) and that acts exclusively to defend borders, national unity and a presumed common identity.

1.2 Resident foreign nationals

Italy's demographic dynamics confirm, year after year, signs of fragility and emergency. The resident population is progressively decreasing, births are falling, and both deaths and emigration – especially among young people – remain at significantly high levels. As of 1 January 2025, with a decline of 0.6 percentage points compared with the previous year, Italy's total population stands at 58,934,000 inhabitants. Positive net migration, thanks to the increasing arrival of foreign citizens in the country, can only partially offset the negative demographic balance. As noted by Istat in its recent Annual Report 2025: The State of the Country, the only components of the population showing signs of growth and development are resident foreign nationals and new Italian citizens. As of 1 January 2025, resident foreign nationals in Italy number 5,422,000 and represent 9.2% of the total population, up by 3.2 percentage points compared with 2024. New Italians – those who have acquired citizenship – number 1.9 million and represent 3.2% of the population. Overall, more than one resident in ten has foreign (direct or indirect) origins.

The Fourteenth Annual Report Foreigners in the Labour Market (MdL 2024) likewise highlights how the marked decline in the native population in Italy over the last 15 years (-1.9 million between 2010 and 2014, equal to -3.3%) has been matched by a significant increase in the foreign population (+1.7 million; +45.5%), which has helped to offset imbalances between labour demand and supply in strategic sectors of the national labour market.

Figure 1 -



Source:

At the start of 2025, net migration remains positive (+244,000): arrivals from abroad (435,000) were more than twice departures (191,000). Beyond the significant volume, incoming flows are also marked by consistency and robustness. Indeed, about 90% of foreign nationals who arrive in the country take up residence, confirming a deliberate migration project oriented toward stability and long-term stay. The number of births on national territory is also steadily increasing: in 2025, roughly one in six foreign residents was born in Italy and, in most cases (about 93%), is still a minor. The main communities involved in this process include the Romanian, Moroccan, Chinese and Albanian.

Overall, most new residents hold European citizenship (46.2%), followed by those from Asia (23.4%), Africa (22.7%) and the Americas (7.6%). In total, 194 nationalities are represented, although 63.3% of residents are concentrated among the top ten: Romania, Albania, Morocco, China, Ukraine, Bangladesh, India, Egypt, Pakistan and the Philippines.

The settlement of the foreign population across the national territory shows a markedly uneven distribution, with a clear concentration in the northern regions. As of 1 January 2025, 58.3% of resident foreigners live in the North, 24.4% in the Centre and 17.3% in the South. The share of foreigners over the total resident population also varies significantly by area, peaking at 11.4% in the Centre – North, 5.1% in the South and 4.2% in the Islands.

By region, Lombardy hosts more than one quarter of residents, followed by Lazio with 12.1% and Emilia-Romagna with 10.5%. Although there is an overall gender balance nationwide, with a slight predominance of males, in 12 out of 20 regions women are the majority. Among these, Umbria and Aosta Valley stand out, with women accounting for 53.4% and 52.5% respectively.

Table 1 – Resident foreign citizens in Italian regions, by sex and overall share in the national total. Year 2025

	Men		**Women**		**Total**	
Region	**Val. ass.**	**Val.%**	**Val. ass.**	**Val.%**		
Piemonte	224.922	50,1%	223.940	49,9%	448.862	*8,3%*
Valle d'Aosta	4.265	47,5%	4.718	52,5%	8.983	*0,2%*
Liguria	84.532	51,5%	79.595	48,5%	164.127	*3,0%*

Lombardia	613.961	49,9%	616.401	50,1%	1.230.362	*22,7%*
Trentino-Alto Adige	51.874	48,8%	54.342	51,2%	106.216	*2,0%*
Veneto	252.655	49,8%	254.832	50,2%	507.487	*9,4%*
Friuli-Venezia Giulia	61.365	49,8%	61.850	50,2%	123.215	*2,3%*
Emilia-Romagna	280.572	49,2%	289.374	50,8%	569.946	*10,5%*
Toscana	216.759	49,3%	223.030	50,7%	439.789	*8,1%*
Umbria	42.184	46,6%	48.403	53,4%	90.587	*1,7%*
Marche	66.837	49,0%	69.689	51,0%	136.526	*2,5%*
Lazio	325.378	49,6%	330.165	50,4%	655.543	*12,1%*
Abruzzo	44.842	49,2%	46.328	50,8%	91.170	*1,7%*
Molise	8.120	55,6%	6.494	44,4%	14.614	*0,3%*
Campania	145.623	52,0%	134.460	48,0%	280.083	*5,2%*
Puglia	84.013	53,6%	72.735	46,4%	156.748	*2,9%*
Basilicata	15.234	55,7%	12.125	44,3%	27.359	*0,5%*
Calabria	55.177	51,9%	51.108	48,1%	106.285	*2,0%*
Sicilia	114.356	54,7%	94.791	45,3%	209.147	*3,9%*
Sardegna	27.537	49,7%	27.840	50,3%	55.377	*1,0%*
Italia	**2.720.206**	**50,2%**	**2.702.220**	**49,8%**	**5.422.426**	***100%***

Source: Istat

1.3 New Citizens

For years, many studies have shown that Italian society is becoming increasingly multicultural (Strozza, Tucci, Conti 2021), both due to the growing number of foreign citizens arriving in the country and to the naturalisation process, which each year produces hundreds of thousands of new citizens. Alongside more than 5 million resident foreigners, Italy counts around 1.9 million new Italians who have acquired citizenship. They are predominantly young people and minors who are making a substantial contribution to countering population ageing and supporting demographic growth (Istat 2025).

In 2024, 217,000 foreign nationals acquired Italian citizenship, 3,000 more than in the previous year.

Among the new Italians, those born in Italy stand out: they are still very young, with an average age of 16.5 years (and remain minors in 59.4% of cases), unlike those born abroad, who are mainly adults with an average age of 47.5 years. In the first group, the children of immigrants from non-EU communities prevail, particularly Albanians and Moroccans who together account for more than 40%. In the second group, alongside these two communities, the Romanian community emerges as well, whose members mainly acquired citizenship through marriage.

The propensity to acquire citizenship, however, varies widely across communities. Among Chinese residents, for example, only 6 out of 100 apply, despite representing an important share among foreigners with children born in Italy (more than 26% of total births among foreigners). By contrast, citizens of Albanian origin are the most inclined to acquire citizenship (75 out of 100 apply), followed by Moroccans (61 out of 100).

Another steadily increasing presence is that of citizens with dual nationality. As highlighted by Istat in the Annual Report 2025, they are predominantly young (11 – 19 years old) and, in 83% of cases, state that they feel they belong to both countries. At the same time, many young foreign residents in Italy, even without formal recognition, say they feel Italian: 80.3% of those born abroad and 85.2% of those born in Italy.

Already in the survey Children and Adolescents, Year 2023, Istat (2024) found that foreigners' sense of belonging tends to decline with age and that the meanings attributed to citizenship are not always the same. Generally, for Italian youths, citizenship evokes a sense of community, whereas for foreign youths it represents a call for essential rights. At the same time, many say that to "be Italian" it is necessary to be born on the territory (54% of Italian youths, 45.8% of foreign youths) or to adhere to and respect specific laws and traditions (47.7%). Overall, 58.9% of the young people surveyed support jus soli and therefore the acquisition of citizenship at birth.

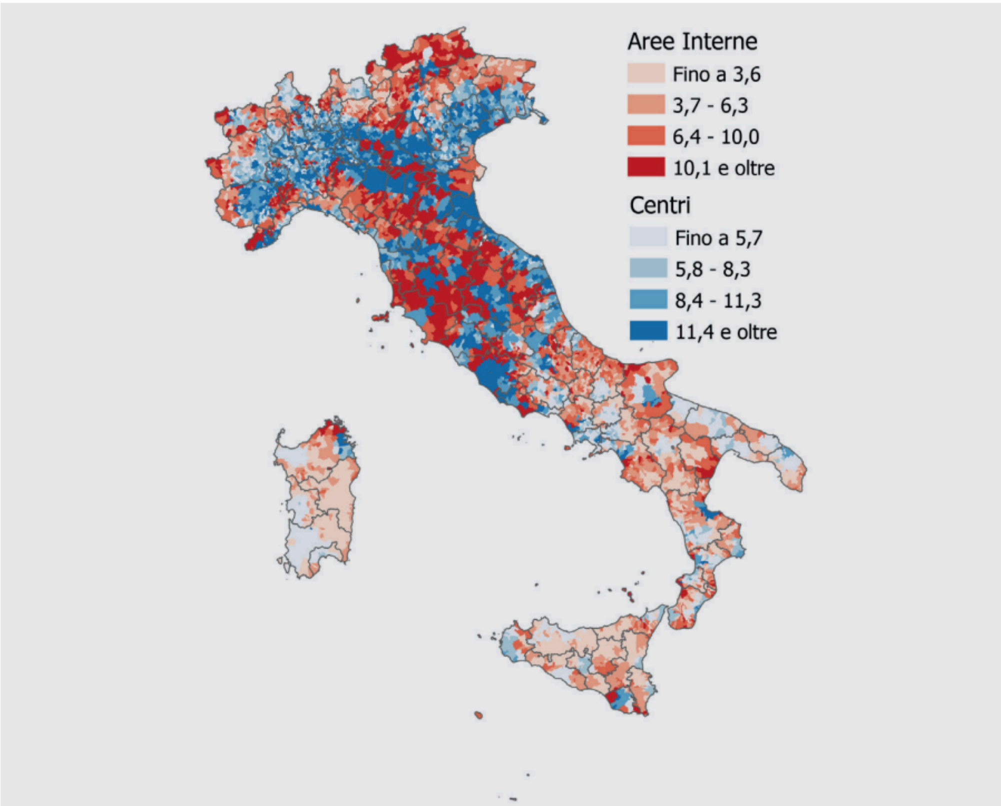
Finally, 62.3% of young foreigners express a firm intention to acquire Italian citizenship.

1.4 New Families

Families with at least one foreign member are steadily increasing. In 2023, there were 2.7 million such families (10.3% of all families in Italy), marking an increase of 50 percentage points in just over a decade (since 2011). Their distribution across the national territory mirrors that of resident foreign citizens and is more pronounced in the Centre-North, where it exceeds 12.7%, and weaker in the South and on the Islands. Even within macro-areas, the presence is not uniform: there is a greater concentration in urban areas to the detriment of inner areas.

In the Annual Report 2025, Istat notes that the greater presence of new families in the most fragile territories – subject to rapid depopulation and ageing – could help renew their demographic structure. By contrast, the inner areas, which are witnessing a steady increase in elderly families, remain scarcely attractive to the foreign population due to insufficient services, resources, opportunities and accessibility.

Figure 2 – Families with at least one foreign member in Italian municipalities. Breakdown by inner areas (labelled Aree interne in the map) and core municipalities (labelled Centri in the map). Year 2025.



Fonte: Istat, Censimento permanente della Popolazione e delle abitazioni

Istat defines the new families as Facs – *famiglie con almeno un componente straniero* (families with at least one foreign member) – and distinguishes two groups: those composed entirely of foreign citizens and mixed families. Of the total, the former account for 70.9% and the latter for the remaining 29.1%. While the former are more widespread in the North, the latter prevail in the

Centre and the South. Milan and Turin host one quarter of the new families in the North-West, while in the North-East the presence is significant in cities such as Bologna, Venice, Verona, Padua, Parma, Reggio Emilia and Modena, which together account for over one fifth of those present in the macro-area.

In Rome, 28.9% of all families with at least one foreign member reside, contributing – together with Florence and Prato – to a clear imbalance in favour of the core municipalities. In the South (Mezzogiorno), the most attractive cities are Naples, Bari, Reggio di Calabria and Foggia. Precisely in the Mezzogiorno there are encouraging signs running counter to past trends: the incidence of new families tends to grow in inner areas, so much so that in the Islands – despite their low attractiveness for foreigners – the distribution between core and inner areas is more balanced. As highlighted in the Istat Annual Report (2025, p. 157), "this is explained both by the smaller presence of large urban hubs and by the widespread diffusion of smaller municipalities where many foreign families reside, often employed in the agricultural sector."

Families with at least one foreign member are predominantly single-person households (40% of the total). Larger households, with four or more members, account for one quarter of the total. Overall, these are very young families, where roughly one in four – 19.9% – are minors (compared with 14.8% among Italians), and only 6.2% include someone aged 65 or over (26% among Italians). This figure varies considerably across communities, with the highest incidence of minors among Egyptians (30.2%) and the lowest among Ukrainians (13.1%, one percentage point less than Italian families); conversely, the incidence of over-65s is almost negligible among Bangladeshis (0.5%), and reaches a peak of 15% among Ukrainians (more than 10 percentage points lower than among Italians).

The incidence of these two age components within families with at least one foreign member makes an important – albeit not decisive – contribution to reducing the demographic imbalance of the national family population: it increases the share of under-17s by 0.4 percentage points (from 14.8% among Italians to 15.2% overall) and decreases the share of over-65s by 1.8 points (from 26% among Italians to 24.2% overall).

Table 2 – Minors (0-17) and older persons in the household population by country of citizenship. Year 2023, percentages.

PAESI DI CITTADINANZA	0-17 anni	65 anni e più
Italia	**14,8**	**26,0**
Romania	21,0	4,1
Albania	23,9	9,8
Marocco	25,8	7,2
Cina	22,6	3,0
Ucraina	13,1	15,0
Bangladesh	22,1	0,5
India	22,3	3,1
Egitto	30,2	1,5
Pakistan	21,4	1,3
Filippine	17,7	9,3
Totale primi 10 paesi	21,9	5,8
Totale altri paesi	16,3	6,9
Totale stranieri	**19,9**	**6,2**
Totale	**15,2**	**24,2**

Source: Istat

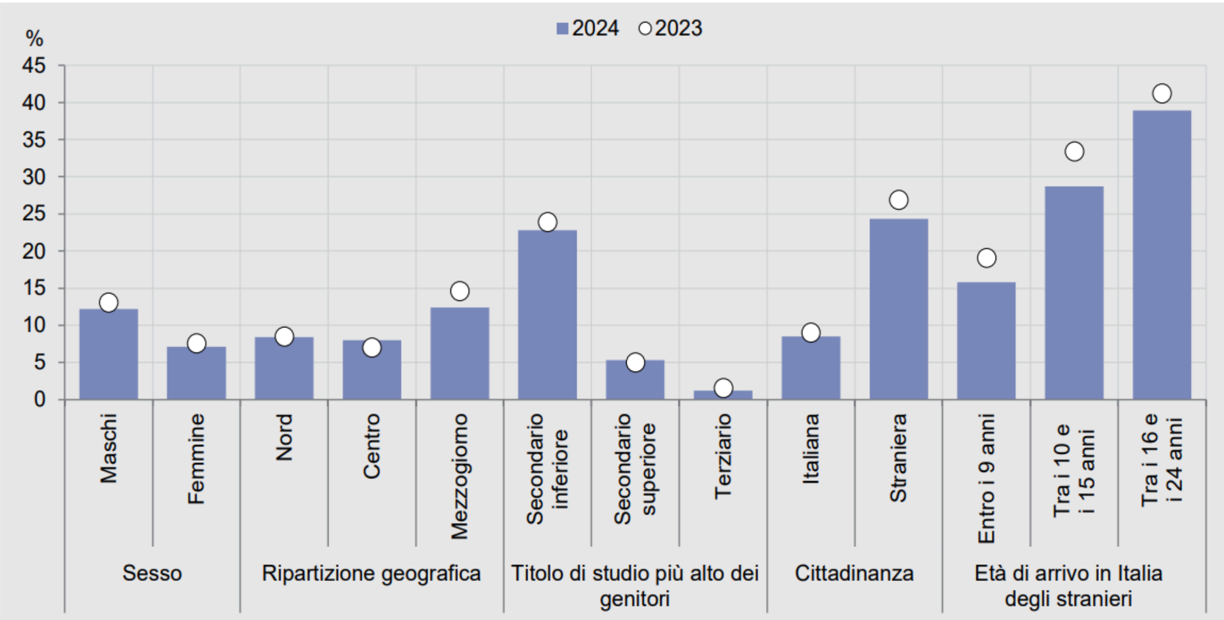
1.5 Educational Attainment

The socioeconomic conditions of the family of origin significantly shape individuals' educational attainment, access to services and forms of participation. In this area, within the EU context, Italy continues to lag behind other Member States. By educational pathway, 43.9% of the Italian population aged 25-64 has attained at most upper secondary education, and only 21.6% has reached a tertiary qualification. Compared with the EU27 average, there is a negative gap of about 14 percentage points in the share of graduates and holders of higher qualifications, while even more alarming is the gap for those with a level of schooling below upper secondary: those whose highest qualification is lower secondary (licenza media) are 34.5% in Italy versus just 20.2% in Europe.

Analysing the educational attainment of the younger population (25-34 years), Istat (2025) identifies a clear gap by citizenship. Specifically, among 25-34-year-olds, more than 34 out of 100 Italians have started and completed university education, compared with 13.4 out of 100 foreign youths. The divide between the two components of the population tends to widen with age, also in the face of rising early school leaving among foreign residents, whose rate is three times that of Italians (24.3% versus 8.5%). The persistence of a significant number of early leavers (9.8% overall among 18-24-year-olds) is a major critical issue that reduces the efficiency of the national education system and constrains inclusion processes in society.

The early-leaving rate among foreign youths varies markedly by age at arrival in Italy. Generally, the nearer the arrival is to the first years of life, the less significant the phenomenon. Among those who entered the country aged 16-24, the early-leaving rate is 38.9%. It falls to 28.7% for those who arrived aged 10-15, and declines sharply among those who arrived by age nine. The phenomenon is also strongly influenced by parents' level of education: the incidence falls markedly for the children of people with a tertiary qualification and tends to be higher among the children of parents with low educational attainment.

Figura 2.7 **Giovani di 18-24 anni che hanno abbandonato precocemente gli studi per sesso, ripartizione geografica, livello di istruzione dei genitori, cittadinanza ed età di arrivo in Italia dei cittadini nati all'estero. Anni 2023 e 2024** (valori percentuali)



Fonte: Istat, Rilevazione sulle forze di lavoro

A substantial contribution, by contrast, comes from foreign youths who enter educational pathways and enrol in Italian schools – particularly pre-primary and primary. Despite a sharp drop in overall enrolments (-5.2% compared with the 2018/2019 school year), the steady rise in foreign pupils partially mitigates a phenomenon that would otherwise reach alarming proportions. In total, there were 914,000 foreign students in the 2022/2023 school year, accounting for 11.2% of all enrolments across every school level in Italy.

1.6 Participation of Foreign Nationals in the Labour Market

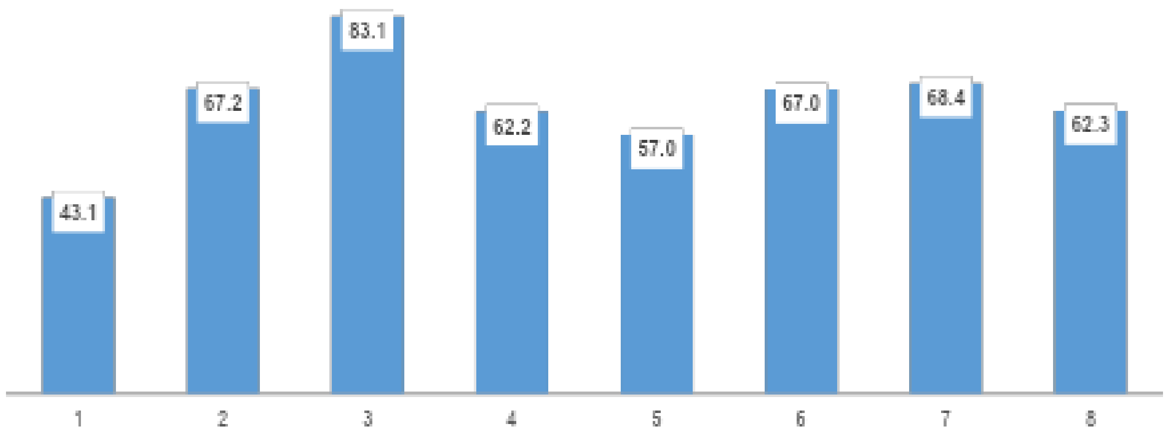
Low birth rates and population ageing are severely straining the country's economic equilibrium and growth prospects (Bank of Italy 2018). According to Istat projections, from the mid-2060s the total resident population will fall below 50 million, the average age will rise from 46.4 to 50.8 years, and there will be a drastic reduction in the working-age population: the share of residents aged 15-64 will drop from 63.5% in 2023 to 54.3% in 2050. A similar scenario is expected in Europe. Eurostat projections indicate that, net of the growing inflow of foreign nationals, between 2023 and 2050 the EU27 population under age 15 will shrink by 6.8 million, while residents aged 15-64 will be 30.6 million fewer (Istat 2023, *Projections of the resident population and households*).

The increasing inflow of foreign nationals is therefore a key factor in ensuring the resilience of the national labour market and the sustainability of the welfare system (European Commission 2024). While the share of Italians aged 15-64 fell by 4.7 percentage points between 2002 and 2024, the share of foreigners in the same age bracket remained broadly stable (-0.8 percentage points). At the same time, although the average age of foreigners rose over the same period in a pattern similar to that of Italians (+5.3 years for the former, +5.4 for the latter), in 2024 the former stands at 35.9 years and the latter at 47.1.

As for employment, it should be noted at the outset that Italy is among the European countries with the lowest employment rate – a result explained by lower female and youth participation and by weaker labour-market participation in the South. Overall, in 2024 Italy recorded 23,932,000 employed persons: foreigners number over 2.5 million, or 10.5% of the total. The employment rate among 15-64-year-olds stands at 62.2% (the EU27 average is 70.8%). Disaggregating by citizenship, no substantial differences emerge between natives and foreigners, whose employment rate aligns closely with that of Italians (62.3% for foreigners and 62.2% for Italians). No significant nationality-based gaps therefore appear in access to employment; indeed, work is often the main driver of the migration project.

However, when employment is considered by educational attainment and citizenship, the rate conceals sharp differences. The data clearly show that while among Italians higher qualifications yield higher employment returns, the same does not hold for people of foreign origin (Figure 3). Specifically, the employment rate of Italians with at least a university degree (83.1%) is almost double that observed for those with low education (43.1%), exceeds by nearly 16 points that of upper-secondary graduates (67.2%), and – above all – is almost 15 percentage points higher than that of foreign university graduates (68.4%). In short, in Italy the employment rate of foreign graduates is almost aligned with that of Italian upper-secondary graduates. Conversely, among foreigners, the rate for those with low educational attainment is higher than among natives (57.0% versus 43.1%).

Figure 3 – Employment rates (15-64) by educational attainment and citizenship. Year 2024 (%).

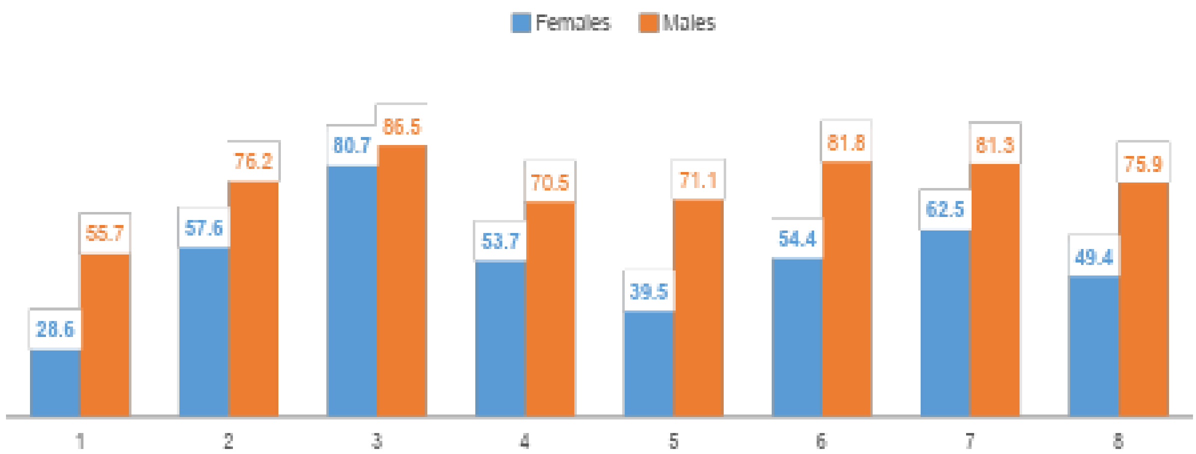


Source: Istat

In Italy, as in many other OECD countries, increases in employment and labour-force participation rates have been faster for women than for men, especially considering that women started from particularly low levels. Among foreign nationals, however, the gender disparity is even more pronounced: in 2024 the difference between the male and female employment rates is 16.8 points for Italian nationals (70.5% and 53.7% in the 15-64 age group) and rises to 26.5 points for foreigners (75.9% versus 49.4%). Moreover, whereas for Italian women holding a tertiary degree brings employment rates much closer together (the gender gap among graduates is 5.8 points), for foreign women the gap remains very large even when they hold a university degree (the employment rate among male foreign graduates is 81.3% and among female graduates 62.5%).

The low returns to education for foreigners are linked to the fact that qualifications obtained abroad are only rarely requested and granted formal recognition in Italy; in other words, foreigners' entry into the labour market very often does not hinge on the qualification obtained (so they have no need to have it recognised), but rather occurs through community and personal networks and within specific occupational niches.

Figure 4 – Employment rates (15-64) by sex, educational attainment and citizenship. Year 2024 (%).



Source: Istat

As noted by the OECD (2023), foreign women face a condition of "double disadvantage," being penalised both as women and as migrants. They also experience the "child penalty," which, by compelling them to provide childcare, exposes them to the risk of exiting the labour market. More often, they are forced to work fewer hours and earn less than men. This phenomenon is even more pronounced for foreign women, also in light of higher fertility: in Italy, just over 30% of foreign mothers are employed, compared with around 60% of native mothers.

For foreign workers, as reported in the latest *Ministry of Labour and Social Policies* report (2024), the risk of becoming unemployed is higher than for Italians. Moreover, in more than half of OECD countries, workers born abroad tend to remain unemployed longer than natives.

As mentioned, Italy's overall employment rate is very low due to the weak participation of young people in the labour market. Across Europe, since 2022 the employment rate of foreign youths aged 15-24 has surpassed that of native youths: in 2024 it is 36.7% among foreign residents aged 15-24 versus 34.8% among natives. This trend is also observed in Italy, with an employment gap of more than six percentage points between the two groups, although levels remain below the EU average (25.7% for foreign youths and 19.2% for Italians).

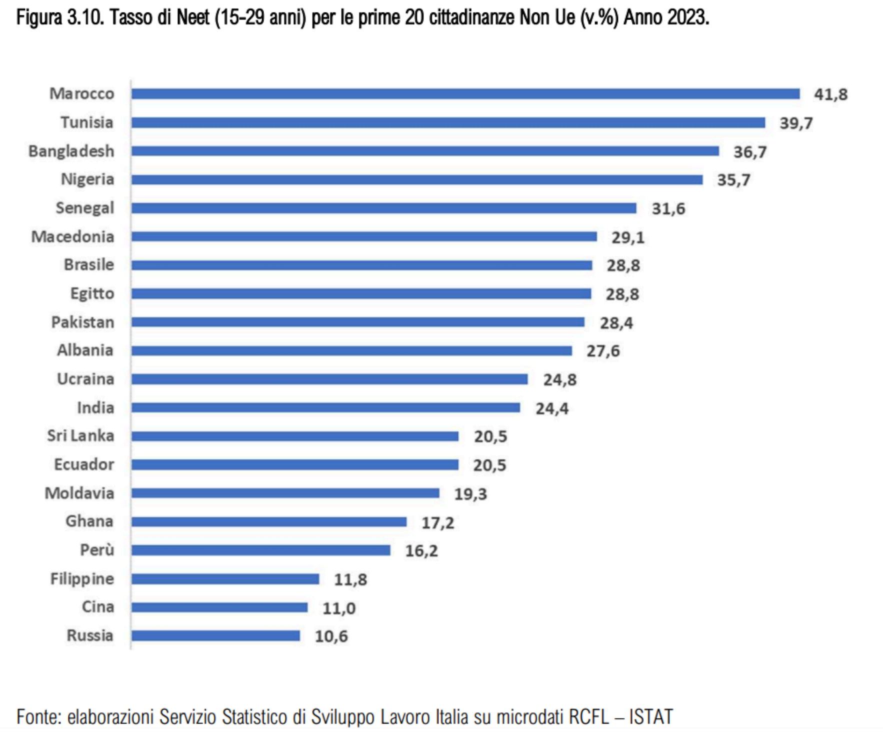
While lower youth employment can partly be attributed to a longer stay in education and training, it is important to note that in Italy non-participation in the labour market is associated with a much higher share of NEETs (Not in Education, Employment or Training) aged 15-29 than in Europe. In 2023, Italy counted about 1.4 million NEETs. Of these, 85.1% are Italians, 2.9% are immigrants from other EU countries and 12% are from non-EU countries. The incidence within each respective population stands at 15.1% among natives, 21% among other EU foreign nationals and 26.5% among non-EU nationals.

Among young women, the divide is starker: 16% among natives, 25.2% among those with EU citizenship and 39.6% among non-EU citizens. Among non-EU NEETs overall, young women account for 67.7%, whereas among Italian NEETs the female share – though higher than the male share – stands at 51.4%.

Among foreign NEETs, caregiving responsibilities for children or non-self-sufficient relatives are the most common reason, accounting for 30% of the total; this share drops considerably among Italian youths (8.9%), who in 80% of cases live as children within their family of origin. The same condition applies to 51.6% of EU NEETs and 33.6% of non-EU NEETs. As Istat recalls in its latest Annual Report (Istat, 2025), Italy ranks fourth in the EU27 (after Croatia, Slovakia and Portugal) for the highest proportion of young people who prolong their stay in the family of origin: more than two out of three 18-34-year-olds, compared with one out of two on the EU27 average.

By citizenship, the highest NEET rate is recorded among young people from Morocco (41.8%), followed by Tunisia, Bangladesh, Nigeria and Senegal, all above 30%. At the opposite end, the incidence among youths from Russia is 10%, followed by China and the Philippines, both not exceeding 12%.

Figure 5 – Young people (15-29) of a non-Eu country neither in employment nor in education and training by citizenship. Year 2023 (%)

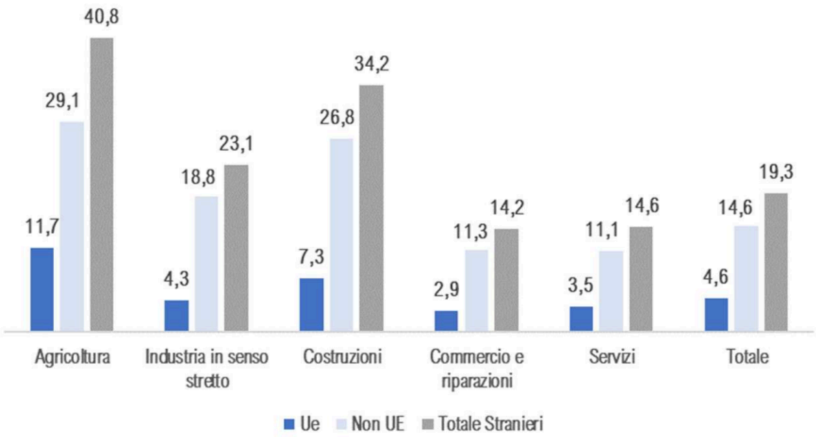


1.7 Segmentations within the labour market

The phenomenon of segmentation refers to the concentration of foreign workers in jobs within certain productive sectors, often characterised by low skill requirements, fewer protections and lower pay. The two most important dimensions of segmentation concern sectors and the types of contracts held by foreign workers in the national labour market. As noted in the *Ministry of Labour and Social Policies* report (2024), based on data from the Information System on Mandatory Employment Notifications (*Sistema Informativo delle Comunicazioni Obbligatorie*), Agriculture is the sector with the highest concentration of starts of employment contracts for foreign workers, who account for 40.8% of all hires. This is followed by Construction (34.2%), Manufacturing (23.1%), Other service activities (14.6%), and Wholesale and retail trade and repairs (14.2%).

Figure 6 -

Figura 4.1. Incidenza percentuale del numero di rapporti di lavoro attivati che hanno interessato lavoratori stranieri sul totale dei rapporti di lavoro attivati per settore di attività economica. Anno 2023



Fonte: elaborazioni Servizio Statistico di Sviluppo Lavoro Italia su dati Ministero del Lavoro e delle Politiche Sociali - Sistema Informativo Statistico delle Comunicazioni Obbligatorie

The only sector in which hires of foreign women prevail is Other service activities, where they account for 51.9% of all non-native hires. In Construction, by contrast, 98% of new contracts were for men; the share falls to 79.5% in Agriculture and to 77.8% in Manufacturing. The balance is more even in Wholesale and retail trade and repairs, where 64.7% of hires involve foreign men and 35.3% involve women.

There is also segregation within sectors by workers' citizenship. Changes in the number of hires between 2022 and 2023 show that Egyptians (+69.0%), Bangladeshis (+44.5%) and Sri Lankans (+31.1%) are the driving groups in agriculture, while Bangladeshis (+76.6%), Egyptians (+48.2%), Sri Lankans (+46.8%), Indians (+43.3%) and Pakistanis (+41.0%) gain prominence in construction.

Segmentation by sector also affects the distribution of entry-level job classifications. Broadly speaking, most employment relationships started for foreign citizens are in low-skill occupations. In 2023, for non-EU workers there were high volumes of hires as Agricultural labourers (387,999), Personal care workers (134,281), Waiters and related occupations (129,188), and Construction labourers and related elementary occupations (113,164). Similarly, these classifications are also high among EU foreign workers, with Agricultural labourers reaching 162,862 contracts, Personal care workers 61,370, and Waiters and related occupations 45,620.

Work in agriculture and in domestic services is the most attractive for the foreign population living in Italy, and also the most vulnerable, as it is exposed to risk and to structural underemployment. These are two sectors in which safety conditions are systematically neglected, low and intermittent pay is the norm, and informal employment relationships remain widespread. Based on the Ministry of Labour and Social Policies' (2025) processing of key statistics on hires of domestic workers (those who received at least one social-security contribution during the year), in 2023 domestic workers of foreign origin accounted for just over half of the total (51.4%). Women are clearly predominant in this category (85.3%), while the share of non-EU men is higher than among male workers overall (14.7% versus 11.4%). Among non-EU nationals, the average age is fairly high: 56.2% are over 50. By citizenship, about 60% of domestic workers come from five countries: Ukraine (20.8%), the Philippines (14.9%), Moldova (8.1%), Peru (8.0%) and Sri Lanka (6.7%).

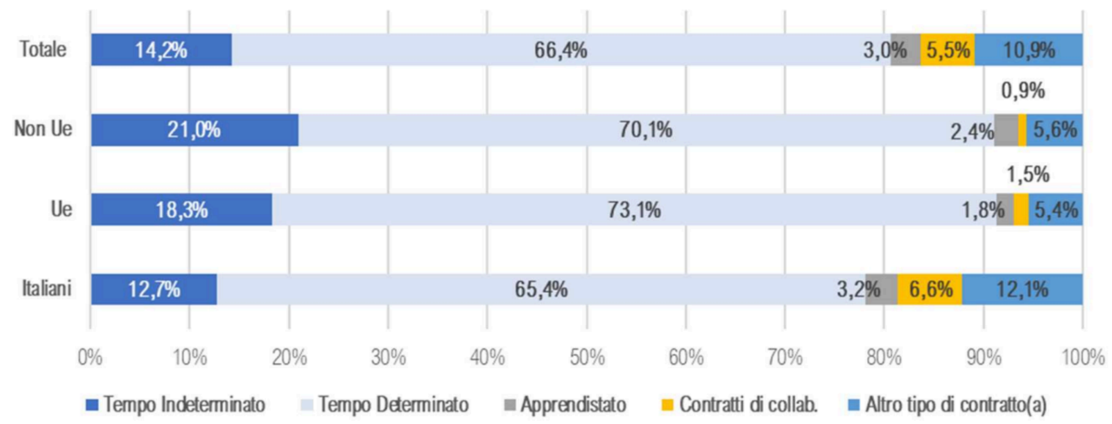
In agriculture, non-EU workers represent 22.8% of the total as of 2023 and are mostly men (81.3%) and comparatively young. The most common age group among non-EU workers is 30-39 (29.1%), whereas among all agricultural workers the 40-49 group predominates (21.9%). By citizenship, most non-EU agricultural workers come from India (15.5%), Morocco (15.3%) and

Albania (14.4%). Together, these three nationalities account for about half of non-EU workers in the sector.

In 2023, permanent contracts accounted for 14.2% of new hires, but the distribution varies widely by citizenship. The lowest incidence is among newly hired Italians, where this contract type covers only 12.7% of new employment relationships. The incidence rises to 18.3% for new contracts held by EU citizens and to 21% for non-EU citizens. At the same time, while the share of fixed-term hires slightly exceeds 70% for both categories of foreign citizens, it drops to 65.4% for Italians, among whom there is a significant share of other “non-standard” contractual forms.

Figure 7 -

Figura 4.2. Composizione percentuale del numero di rapporti di lavoro attivati per tipo contratto e cittadinanza dei lavoratori interessati. Anno 2023



(a) La tipologia contrattuale “altro” include: contratto di formazione lavoro (solo P.A.); contratti di inserimento lavorativo; contratto di agenzia a Tempo Determinato e Indeterminato; contratto Intermittente a Tempo Determinato e Indeterminato; lavoro autonomo nello spettacolo. (b) il Totale è comprensivo degli N.d.

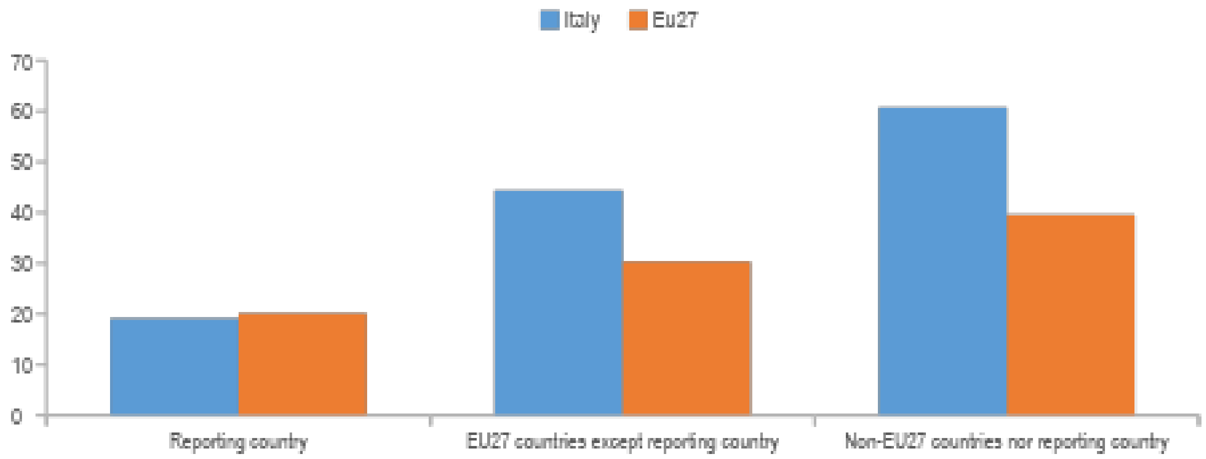
Fonte: elaborazioni Servizio Statistico di Sviluppo Lavoro Italia su dati Ministero del Lavoro e delle Politiche Sociali - Sistema Informativo Statistico delle Comunicazioni Obbligatorie

In a focus section titled “Transformations from Fixed-Term to Open-Ended Contracts,” the Ministry of Labour and Social Policies Report (2024, p. 55) notes that in 2023, in addition to new contract activations, there were about 750,000 conversions – an increase of 2% compared with the previous year. This change is +9% for all foreign citizens overall, but shows a 2% decrease for EU nationals alongside a positive jump of 12.2 percentage points for non-EU nationals.

This figure also shows unprecedented territorial variability. While overall conversions declined in the North-East (-0.8%), significant increases were recorded in the South (Mezzogiorno) and in the Centre (+8.8% in the former and +5.9% in the latter). In particular, in the Mezzogiorno the increase was +8.1% for Italians and +16.5% for foreigners; among the latter, the change for non-EU citizens clearly predominates and exceeds 20%. At the same time, Other service activities is the sector with the highest overall increase (+6.1%); however, whereas for Italians the largest positive change is in Agriculture (+5.7%), for foreigners the most attractive sector is Wholesale and retail trade and repairs (+13.1% overall: +5.7% for EU and +15.1% for non-EU).

Segmentation is only one of the many faces of foreigners’ vulnerability in the labour market. Another dimension that highlights differences by citizenship is over-qualification – that is, performing a job for which the required educational level is lower than the one held. In 2024 in Italy, among 20-64-year-olds, nearly one in five Italian nationals is over-qualified (19.1%), around one percentage point below the EU average. When considering non-Italian citizens, however, a critical gap emerges: among those from EU countries the rate stands at 44.4% (30.3% in the EU), rising to 60.7% for non-EU nationals (39.6% in Europe).

Figure 8 - Over-qualification rates by citizenship. Years 2024 (%)



Source: Eurostat

Educational levels among the foreign population partly explain the degree of segmentation in the labour market. On average, foreign residents have lower educational attainment than natives, yet they remain under-represented in high-skill employment even when they hold advanced qualifications – especially if obtained abroad. Indeed, foreigners with tertiary education have an employment rate 8 percentage points lower than natives with the same level of education obtained in Italy, whereas the gap widens to 47 percentage points between natives and foreigners whose qualification was earned abroad. Only 22% of the latter are employed in high-skill jobs, compared with 69% of natives. This gap is the largest in Europe and diverges from the EU27 average by about 20 percentage points.

Table 3 – Working-age university graduates in high-skilled jobs, by citizenship and – among foreign-born people – place of degree attainment. Percentages, 2021.

	Nativi	Stranieri istruiti all'estero	Stranieri istruiti nel Paese ospitante	Scarto Nativi/Stranieri istruiti all'estero
Italia	69	22	61	47
Spagna	54	29	47	25
Austria	66	39	62	27
Francia	70	40	61	30
Totale EU27	70	42	65	28
Germania	74	42	21	32
Finlandia	74	44	67	30
Norvegia	82	50	68	32
Belgio	71	52	70	19
Danimarca	76	52	72	24

Paesi Bassi	79	55	71	24
Svezia	84	58	76	26
Svizzera	74	70	78	4

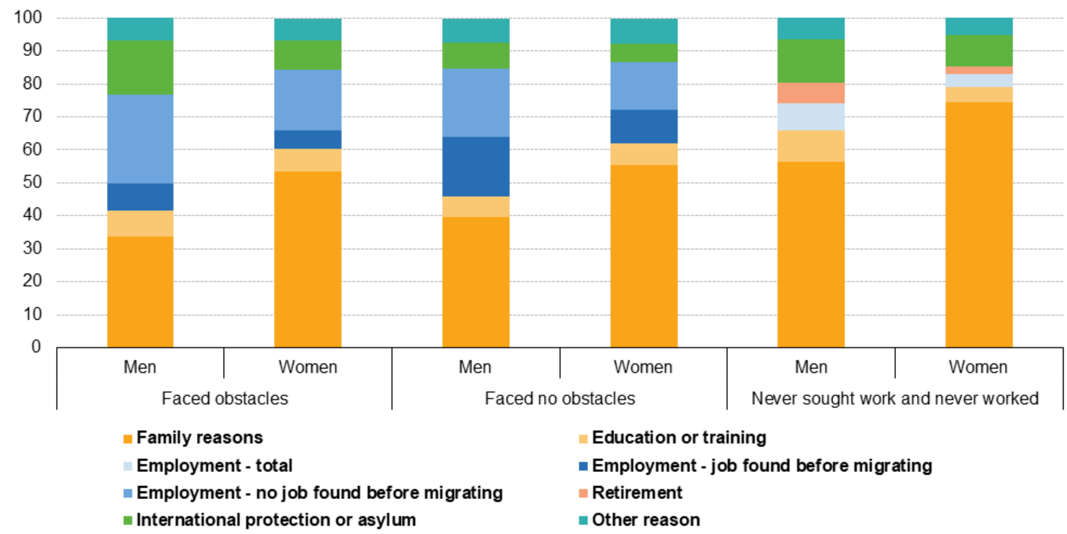
Fonte: elaborazioni proprie su dati EU_LFS 2021

1.8 FOCUS: Obstacles to finding suitable employment for the foreign-born population

Eurostat Labour Force Survey (EU-LFS) data offer an overview of how long foreign nationals remain in the European labour market. In 2021, nearly two thirds (64.5%) of foreign nationals aged 15-74 reported having encountered no obstacles in finding suitable employment in the host country – that is, a job matching their level of education. By contrast, 23.5% reported facing obstacles. The risk is markedly higher for women: only 59.2% reported never encountering obstacles (versus 70.4% of men), while 24.7% reported difficulties (compared with 22.2% of men). Unlike men, moreover, the remaining 16.1% of women stated that they had never looked for work (7.4% among men).

There are also significant gender differences in the reasons given. Although family reasons are the main obstacle for both groups, they exceed 50% among women, while standing at roughly 30% among men. For men, by contrast, one of the prevailing reasons concerns having looked for work prior to migration; the negative outcome of that search led to the unconditional acceptance of employment that did not match their educational level.

Foreign-born people, by presence of obstacles to getting a suitable job in the host country, sex and reason for migrating, EU, 2021
(in %, age group 15-74)

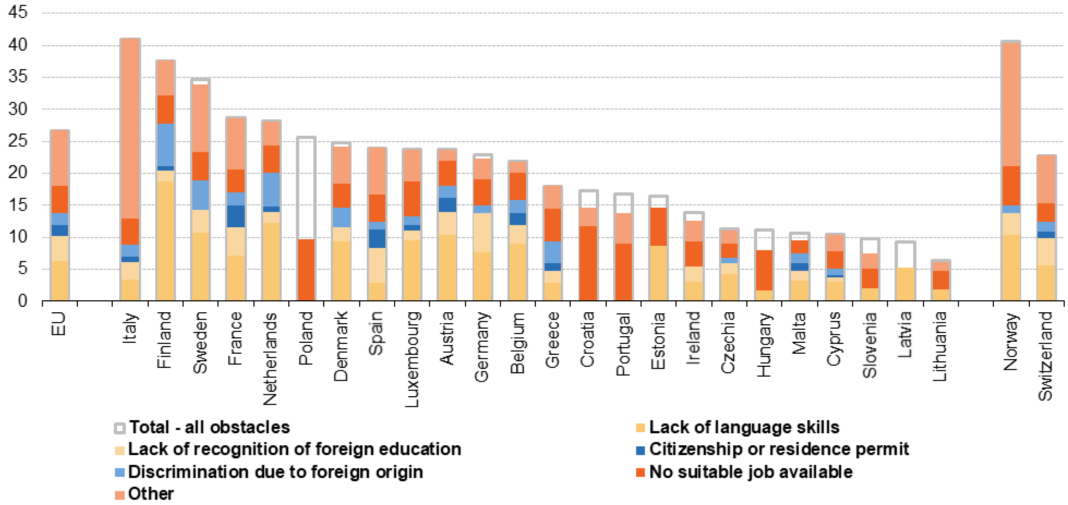


Data reliability flags are available in the Excel file attached to the article.
Source: Eurostat (lfso_21obst03)

eurostat

Among European countries, Italy records the highest share of foreigners who encountered obstacles in finding suitable employment (41% of the total). It is noteworthy that, unlike other countries where the reasons are clearly specified, in Italy there is a predominance of the “other” category (28.1%), which points to intersectional and multiple factors and also includes – Eurostat notes – a segment of the foreign population who report never having sought a job matching their educational level.

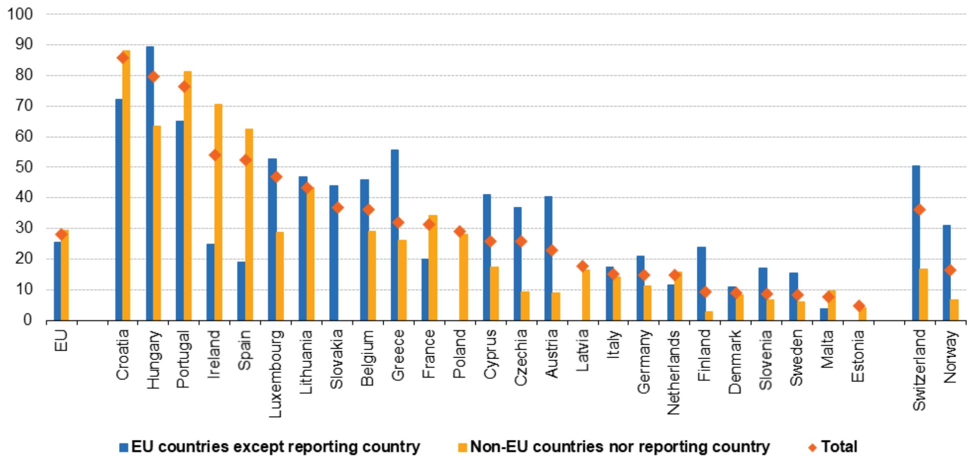
Foreign-born people who have faced obstacles to getting a suitable job in the host country, by main obstacle, 2021
(as a percentage of foreign-born people who have worked or looked for a job in the host country, age group 15-74)



Data not available due to very low reliability: Bulgaria, Romania and Slovakia.
Some categories of obstacles are not shown at this level of detail due to very low data reliability.
Data reliability flags are available in the Excel file attached to the article.
Source: Eurostat (lfso_21obst01)

Eurostat (2023) devotes a paragraph to foreign nationals' language skills as an obstacle to finding suitable employment. It finds a marked gap between non-EU and EU foreigners. Only in Croatia, Portugal, Ireland, Spain, France, the Netherlands and Malta was the share of non-EU foreigners who knew the host-country language higher than that of EU foreigners. In Italy, by contrast – although few have adequate language knowledge before departure – the gap between the two groups is minimal (see chart), still to the advantage of those coming from EU countries.

Foreign-born people who before migrating could speak the language of the host country proficiently or as a mother tongue, by country of birth, 2021
(as a percentage of foreign-born people in each category, age group 15-74)



No data available due to very low reliability: Bulgaria and Romania.
Data reliability flags are available in the Excel file attached to the article.
Source: Eurostat (lfso_21lang01) and ad hoc extraction from EU-LFS Module 2021

Chapter 2

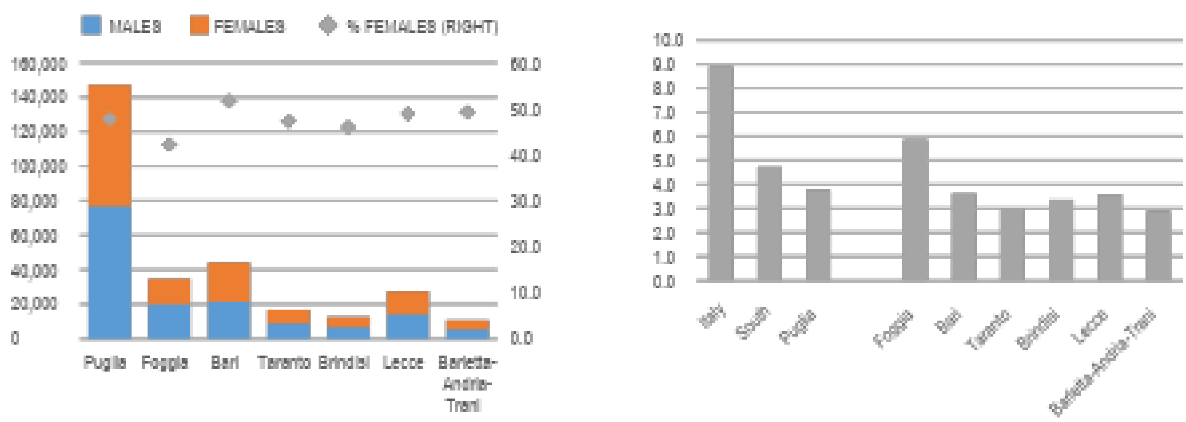
Foreign nationals in Apulia and the labour market

2.1 The resident foreign population

As of 1 January 2024, according to Istat, 147,269 foreign nationals reside in Apulia, equal to 3.8% of the population. The foreign presence in the region is markedly lower than that recorded in Italy as a whole (8.9%) and in the South (4.7%). Among Apulian provinces, the share of resident foreigners is highest in Foggia (5.9%), followed by Bari and Lecce (3.6%), Brindisi (3.4%), Taranto (3.0%) and Barletta-Andria-Trani (2.9%).

By gender, the share of women is slightly lower than the national and Southern averages: in Apulia, women account for 47.8% of all foreign citizens, compared with the national average of 50.5% and 49% in the South. Bari (51.7% women) and Foggia (42.2%) mark the extremes of the provincial distribution.

Figure 9 – Foreign-born persons in the resident population by sex (left chart). Absolute numbers and share of women. Share of foreign-born persons in the resident population (right chart). 1 January 2024

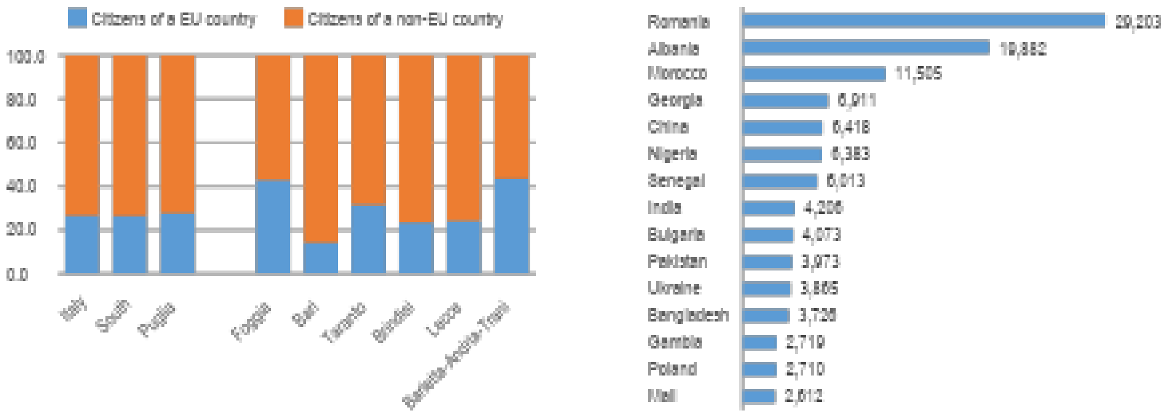


Source: Istat

In Apulia, as in Italy and the South, just under three out of ten resident foreigners come from European Union countries. The situation, however, varies across the territory: in the provinces of Foggia and Barletta-Andria-Trani, about 43% of resident foreigners are from EU countries, and in Taranto the share is 31.5%; in Bari, by contrast, the majority of resident immigrants (86.1%) are from non-EU countries. In the other provinces, the profile of resident foreigners is more in line with the regional average.

In the region, about one in five resident foreigners is Romanian (just over 29,200 people). Next come the Albanian community (19,882 people, 13.5% of the total) and the Moroccan community (11,505 people, 7.8%). The fourth most numerous nationality is Georgian (4.7% of the total), owing to a strong presence in the province of Bari, where this citizenship ranks second: more than 5,200 Georgians live in the province, nearly 12% of foreigners in the Bari area. The shares of foreigners from China, Nigeria and Senegal are around 4%. Taken together, these seven nationalities account for about 60% of all residents of immigrant origin.

Figure 10 – Foreign-born persons in the resident population by country of citizenship (left chart, %) and top 15 citizenships in Apulia (right chart, absolute numbers). 1 January 2024



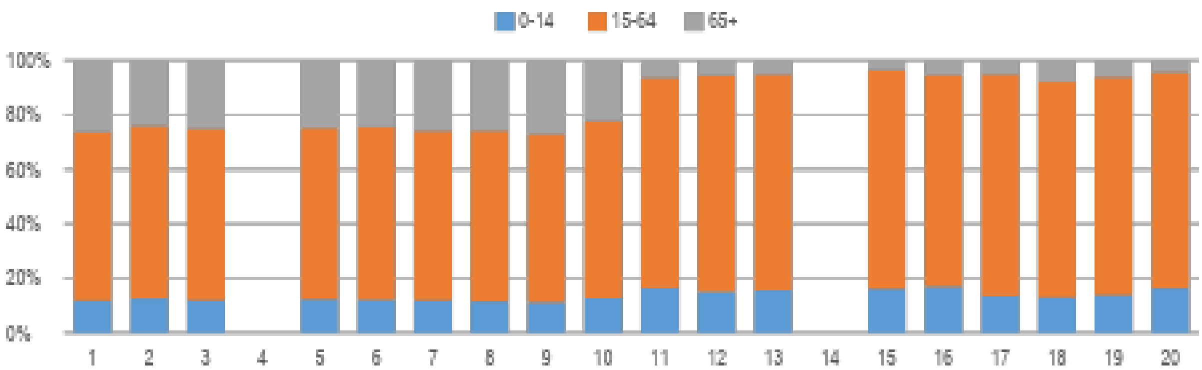
Source: Istat

As is well known, the resident foreign population is younger than the population as a whole. Focusing only on the foreign population in Apulia, the share of youths aged 0-14 (15.5%) is slightly lower than in Italy (16.6%) but slightly higher than in the South (15.0%); the working-age population, i.e. those aged 15-64, stands at 79.4% and is in line with the South and two percentage points higher than the national average (77.3%); by definition, the share of older people (65+) is lower (5.1% in Apulia versus 6.1% in Italy). Overall, the foreign population in Apulia is slightly younger than the Italian population, as shown by the old-age index – the number of older people per 100 young people – which in the region (32.9 older people per 100 young people) is a little below the comparison average (36.8).

Inter-provincial variations in these indicators – like the gender composition briefly reviewed above – depend on the differing features of migration across the territory. Limiting ourselves to a few extreme values, some distinctive traits emerge:

1. Foggia stands out for having the lowest share of older foreign residents in the region (3.5%), which also translates into a lower old-age index (21.6);
2. in Brindisi, by contrast, the old-age index (60.2 older people per 100 young people) is nearly twice the regional value;
3. Taranto has the highest share of foreign residents of working age (81.2%);
4. Bari shows the highest share of youths aged 0-14 (17.1%).

Figure 11 – Resident population by citizenship (nationals/foreign-born) by age class (%). Year 2024



Source: Istat

Residence permits data help to better outline stabilisation processes. As at 1 January 2024, figures on the total stock of residence permits, broken down by permit duration, show that in Apulia just over half (51.5%) of the 91,649 permit holders have a long-term permit, a share lower than the national average (59.3%) and slightly below that observed in the South (53.1%). The figure varies widely across territories: in the provinces of Foggia and Taranto, for example, the share of time-limited permits is very high, accounting for 61.8% and 57.8% of the total respectively; conversely, in the Bari area the share of long-term permits rises to 60.8% of all permits in force.

Considering entries during the year of non-EU citizens by reason for the permit, it is possible to identify the drivers of migration – work, family, study, international protection (including asylum, asylum application, humanitarian reasons, subsidiary protection and temporary protection), and other reasons. In 2023, according to Istat, 11,952 new residence permits were issued to non-EU citizens. Of these, 16.5% were issued for work reasons – much higher than the national average (11.8%) and slightly lower than the South (18.5%). Foggia and Lecce are the provinces where the share exceeds 19%. In Apulia, however, the most frequent reason is international protection, accounting for 41.1% of permits, compared with a share nine percentage points lower at the national level (32.1%). This category is particularly distinctive in the province of Taranto, where 68% of new entries in 2023 were linked to international protection. By contrast with the national profile – where family reunification is the leading reason for new entries (39.0%) – in Apulia it falls to 28.5% of the total.

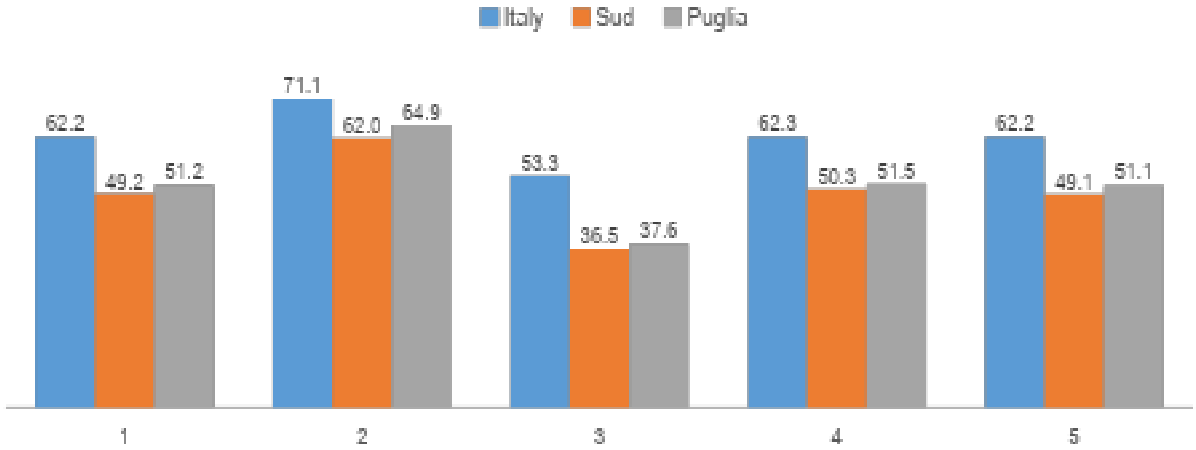
2.2 Participation in the labour market

In 2024, total employment in Apulia stands at over 1.3 million; of these, nearly 61,000 are foreign nationals, or 4.7% (as noted above, in Italy foreigners account for 10.5% of total employment). Employed women number about 24,500 and represent 5.1% of all employed women aged 15 and over.

Overall, Apulia’s employment levels are lower than the national figures but higher than those observed in Southern Italy, which has historically had lower employment: the employment rate among 15-64-year-olds is 51.2%, two percentage points higher than the South but fully 11 points below the Italian average. Disaggregating by gender, the employment gap is particularly marked for women: for men, the distance between the regional and national rates – 64.9% and 71.1% respectively – is just over six percentage points, whereas for women it widens to nearly 16 points. Indeed, in 2024 in Apulia just over one woman in three is employed – a dramatically low figure. As already noted, low female employment is one of the entrenched weaknesses of the Italian labour market, especially in the Mezzogiorno.

By citizenship, the distances between Apulia and Italy do not change: as at the national level, the employment rates of natives and foreigners are at similar levels, and therefore so are the gaps with the Italian average.

Figure 12 - Employment rates (15-64) by sex and by citizenship. Year 2024 (%)

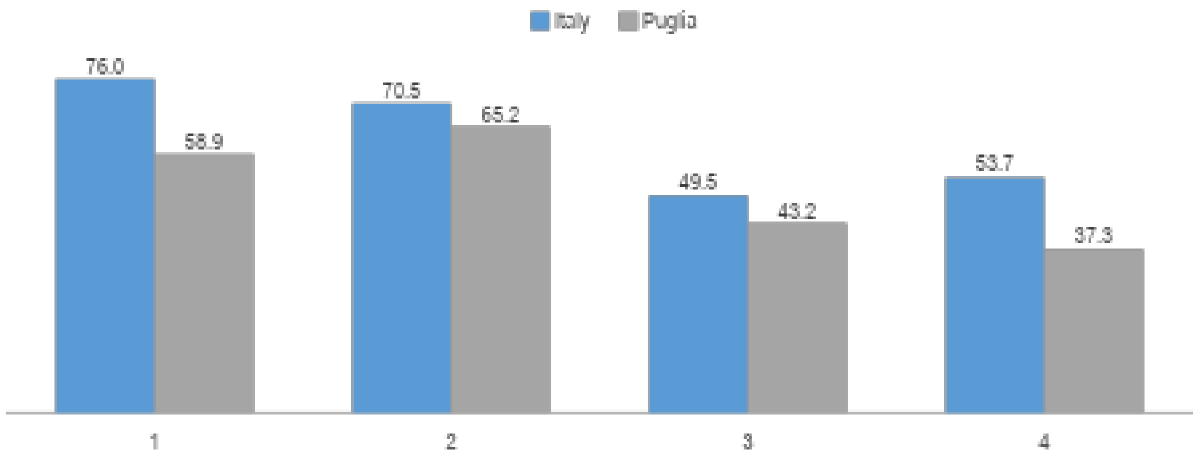


Source: Eurostat

Drilling down further and considering gender and citizenship jointly, employment rates in Apulia are consistently lower than the national averages, regardless of gender or country of origin. A few additional elements help to distinguish the regional profile from the national one more clearly. The main findings can be summarised as follows:

- In Apulia, unlike in Italy as a whole, the employment rate of foreign men (58.9%) is lower than that of Italian men (65.2%).
- For women, too, the regional profile differs from the national one, as the employment rate of foreign women (43.2%) is higher than that of Italian women (37.3%).
- Among men, employment gaps with the Italian average are larger for foreigners; among women, they are larger for Italians.

Figure 13 - Employment rates (15-64) by sex and citizenship (%). Year 2024

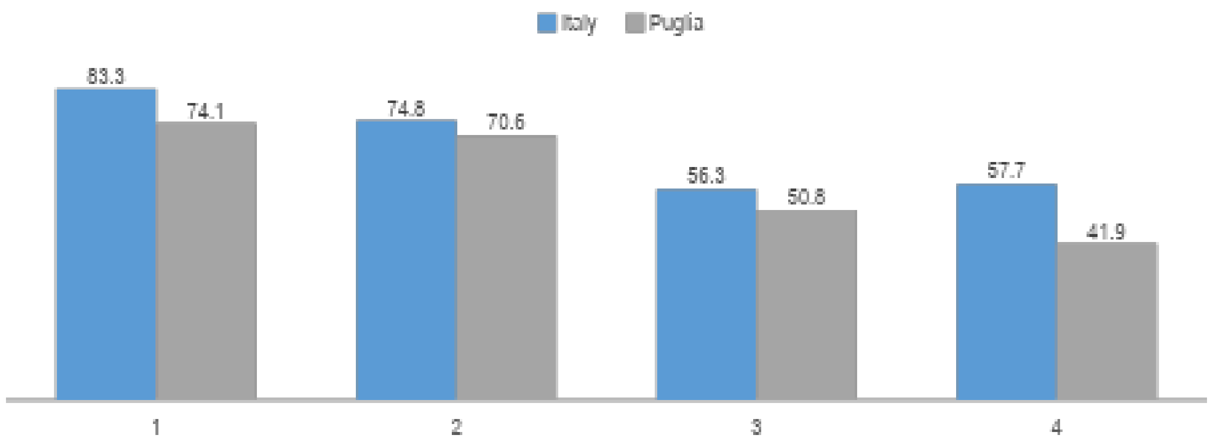


Source: Eurostat

These results can also be interpreted in light of actual labour-market participation – especially among women – which sees foreign men and women more active in the labour market, partly reflecting their life and migration trajectories. Looking at activity rates, Apulia's labour market shows lower participation overall than the national average: in 2024 the rate for ages 15-64 is 56.5%, more than 10 points below Italy (66.6%). The gap with the national figure narrows, however, when citizenship is considered: for foreign residents in Apulia (whose activity rate is 63.1%) the distance from the Italian figure (69.4%) is smaller.

Considering gender as well, the gap between foreign women in Apulia (50.8%) and foreign women overall (56.3%) is smaller still. Moreover, while at the national level the activity rate of foreign women is lower than that of Italian women (57.7%), in Apulia the participation of immigrant women (50.8%, as noted) is almost 9 percentage points higher than that of native Apulian women (41.9%). This very low participation of native women in the labour market is one of the major issues affecting not only Apulia but the whole of Southern Italy.

Figure 14 – Activity rates (15-64) by sex and citizenship (%). Year 2024

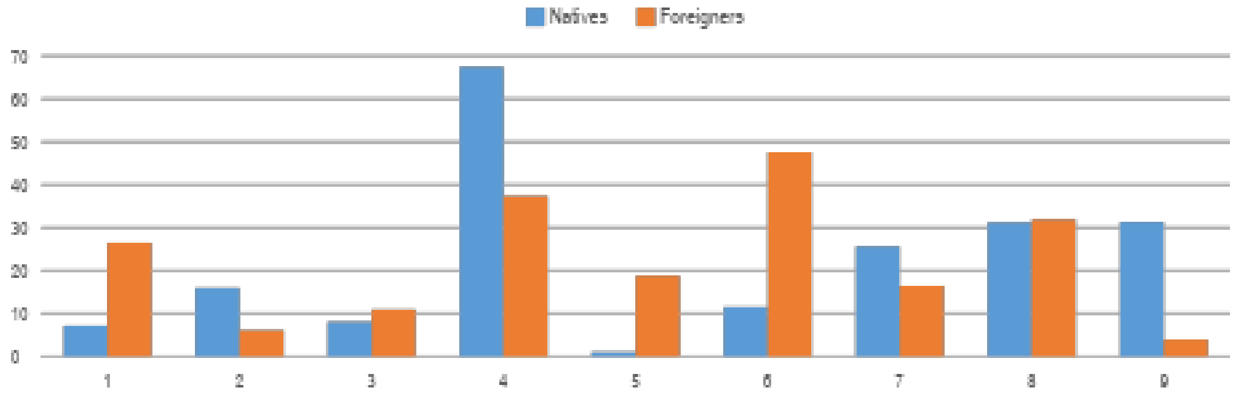


Source: Eurostat

In 2024, there were 133,000 jobseekers in Apulia. The unemployment rate in the 15-74 age group stands at 9.3%, almost three percentage points above the national average. Although the magnitudes differ, the region shows a persistent disadvantage compared with national figures. A clear disadvantage emerges for people of immigrant origin: in Apulia the unemployment rate is 8.8% for Italians and 18.3% for foreigners, a gap of 9.5 percentage points. The divide between Italians and foreigners is more pronounced among men than among women: the unemployment rate for foreign men is 20.5%, while it falls to 7.5% for Italian men. Among women, the citizenship gap is smaller: the unemployment rate is 14.8% for immigrant women (lower than for men) and 10.9% for Italian women.

According to the latest *Dossier Statistico Immigrazione 2024* (IDOS Centre for Study and Research, 2024), in Apulia's local labour market migrants are more concentrated than Italians in agriculture (26.5% of foreign workers are employed in this sector versus just 7.2% of Italians), in construction (11.0% versus 8.1%) and in the domestic sector (18.9% versus 1.1%).

Figure 15 – Employed persons (15-64) by economic activity, occupation and citizenship (%). Year 2023



Source: own elaboration from Centro Studi e Ricerche IDOS, Dossier Statistico Immigrazione 2024 (p.478)

With regard to type of employment, according to the same source unskilled manual work is performed by almost half of foreign workers (47.6% versus 11.6% of Italians). Compared with the national average, Apulia records 17.6 percentage points more for foreigners and 3.5 points more for Italians. Skilled manual work is performed by 16.5% of foreign workers and 25.7% of Italians. Here, too, the gap with the national figure is significant: nationally, 31.7% of foreign workers are employed in skilled manual jobs. More in line with the national average is the share in clerical, sales and personal services jobs: 31.9% of foreign workers and 31.3% of Italians. Finally, only 4.0% of foreign workers are employed as managers or in intellectual and technical professions (the national figure is more than double: 8.7%), compared with 31.4% of Italians (38.6% nationally).[1]

[1] See also the 2024 report by the IDOS Centre for Study and Research, which includes an in-depth analysis of Apulia.

Chapter 3

Demand for immigrant workers in Apulia: sectors, occupations, skills

3.1 Apulia's productive structure

Labour demand – not only for immigrant workers – depends significantly on the productive structure. In 2024, more than 325,400 enterprises are active in Apulia, accounting for 6.4% of all active enterprises in Italy.

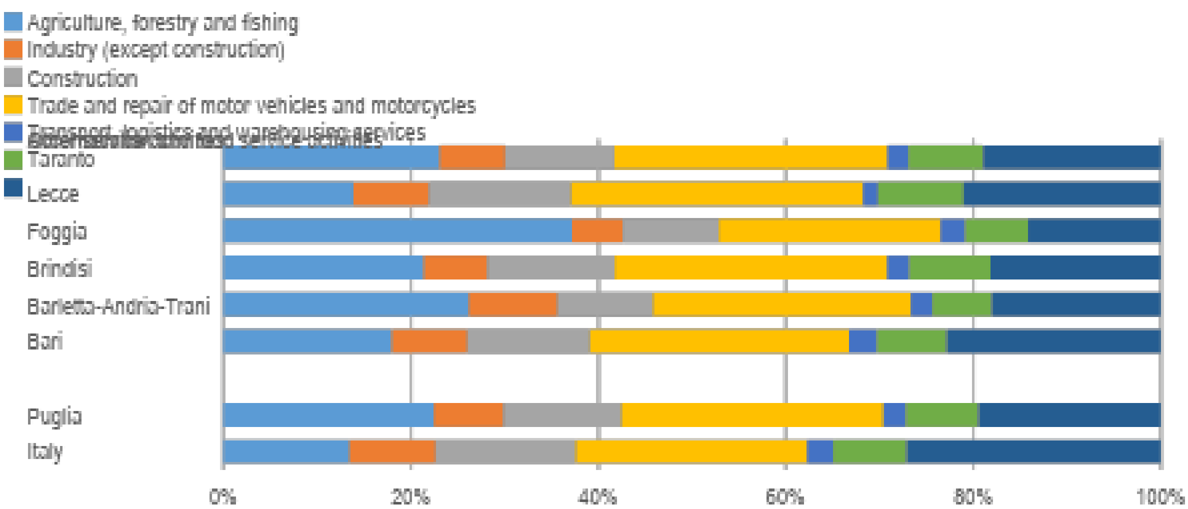
In the region, the most representative economic sectors – both in absolute terms and compared with the national average – are Trade, with 28.0% of active enterprises (24.7% in Italy), and Agriculture, with 22.4% of the total (13.5% in Italy). Although enterprises in Trade are more numerous, in terms of specialisation the region shows a strong agricultural vocation, which is even more pronounced in the province of Foggia, where primary-sector enterprises make up 37.2% of the total. By contrast, in Lecce the share of agricultural enterprises is the lowest (13.8%), in line with the national average, but Trade reaches its maximum, with 31.2% of active enterprises. In the provinces of Brindisi and Taranto (both at 29.1%), the share of enterprises in Trade is also higher than the comparison averages.

As for the other sectors, the province of Barletta-Andria-Trani shows a stronger industrial vocation: industrial enterprises account for 9.5%, a higher share than in Apulia as a whole (7.5%) and slightly above the Italian figure (9.2%). This province also has a higher-than-average share of agricultural enterprises.

The Construction sector appears more developed in the province of Lecce (15.1% versus 12.5% for Apulia) and, to a lesser extent, in Brindisi (13.6%). The same two provinces share a higher share of enterprises in accommodation and food service activities (8.7% in Brindisi and 9.1% in Lecce, compared with 7.7% in Apulia), reflecting these areas' tourism orientation.

The transportation and storage sector, although residual at 2.4% of active enterprises, characterises the province of Bari, whose profile is nonetheless clearly specialised in services, which account for 22.9% of all enterprises in the area (19.5% in Apulia).

Figure 16 – Active enterprises by main sectors of economic activity. Italy, Apulia and Apulian provinces. Year 2024 (%).



Source: Infocamere (extracted from: Open Data Explorer, https://opendata.marche.camcom.it/)

3.2 Labour demand in industrial and service enterprises

According to data from the Excelsior Information System[2], managed by Unioncamere, in 2024 planned labour demand from industrial and service enterprises in Apulia amounts to more than 332,630 positions.

Planned hires of immigrant workers totalled 53,970, accounting for 16.2% of all planned hires. territorially, demand for foreign workers is lower in the provinces of Taranto (14.9%) and Bari (15.6%), while in Lecce (16.5%) it aligns with the regional figure. Brindisi and Foggia show higher demand: planned hires of immigrant workers represent 18.0% and 17.6% of the total, respectively.

In Italy as a whole, demand for foreign workers amounts to 1,082,170 people, or 19.6% of the total – meaning Apulia and its provinces show lower demand than the national context.

Table 4 – Planned hires by enterprises and number of immigrant hires. Apulia, Apulian provinces, Italy. Year 2024. Absolute values and percentage incidence.

TERRITORIO	Planned hires	Immigrant hires	% immigrants
PUGLIA	332630	53970	16,2
BARI	144130	22500	15,6
BRINDISI	30930	5570	18,0
FOGGIA	46850	8240	17,6
LECCE	71550	11830	16,5
TARANTO	39180	5840	14,9
ITALY	**5516280**	**1082170**	**19,6**

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

3.3 Sectors

Labour demand from enterprises – not only for immigrant workers – is naturally shaped by the territorial productive structure. By analysing data by sector of activity, it is possible to identify the branches where occupational/skills needs are most pronounced.

Starting from a fairly aggregated sectoral level, in 2024 in Apulia the demand for immigrant personnel as a share of total planned hires is highest in Construction (21.9% of all planned hires) and Tourism (20.0%). A lower incidence is found in Trade (11.9%). Considering the top three sectors by absolute numbers, demand for foreign workers amounts to 16,240 positions in the tourism sector, 11,160 in business services, and 8,010 in construction.

Table 5 – Planned hires by enterprises and number of immigrant hires by macro-sector. Apulia. Year 2024. Absolute values and percentage incidence.

MACRO-SECTOR	Planned hires	Immigrant hires	% immigrants
Industry (except construction)	48240	6790	14,1
Construction	36590	8010	21,9
Trade	59530	7080	11,9
Tourism	81030	16240	20,0

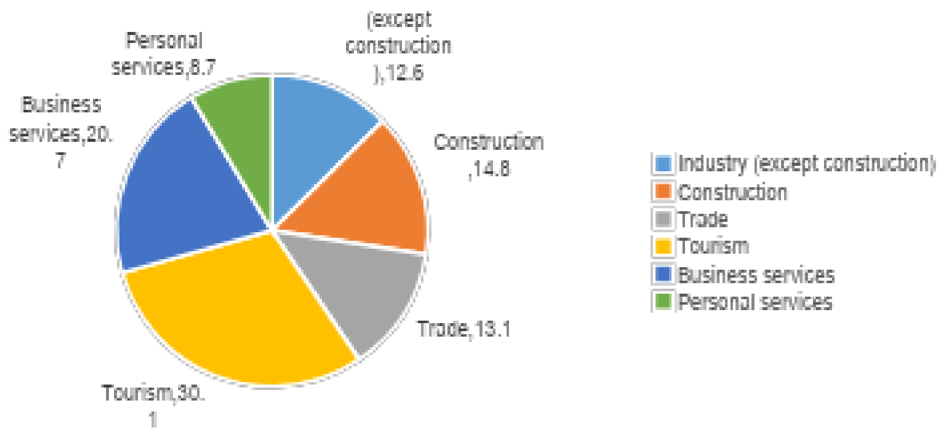
[2] To analyze the labor demand of Apulian enterprises data produced by the Excelsior Information System is used. Established in 1997 by Unioncamere, in collaboration with the Ministry of Labour, and the European Union, the Excelsior "Information System for Employment and Training" is one of Italy's major sources on topics relating to the labour market and training, and is one of the official surveys included in the National Statistical Program (PSN). The Excelsior Information System offers a constantly updated overview of the development trends and the main qualitative characteristics of the demand for employment in Italy, providing extremely useful information in support of training planning processes, guidance activities, and the active labour policies of the Government, the Regions, and other public institutions. The survey brings greater value to the information obtained from the chambers' administrative archives on businesses and employment, and provides for the sampling of over 500,000 industrial and service companies of all sizes on an annual basis. The Excelsior survey's field of observation consists of businesses operating in the industrial and service sectors with an annual average of at least 0.5 employees. For the purposes of the analyses, only contracts with a duration of at least 20 business days are examined. The agricultural sectors, the Public Administration, professional firms, and entities that are not registered with the Chambers of Commerce, including non-profits, are therefore excluded. This definition takes into consideration over 1.3 million businesses (approximately one third of all businesses in the industrial and service sectors), with a total of about 12 million employees, corresponding to two thirds of the total (more information about the data source are avilable here: https://excelsior.unioncamere.net/en)

Business services	65680	11160	17,0
Personal services	41560	4690	11,3
PUGLIA	**332630**	**53970**	**16,2**

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

If, instead of incidence, we look at the composition of demand for immigrant workers, we find that Tourism and Other services (business and personal) together – at very similar shares – absorb almost six out of ten planned entries of foreign personnel; adding Trade takes the total to over 72%. Demand from enterprises in industrial sectors accounts for 12.6% of all incoming foreign workers, while Construction rises to 14.8% of the total.

Figure 17 – Immigrant hires by sector. Apulia. Year 2024. Percentage composition.



Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

Drilling down into sectors for which a more detailed breakdown is available, in 2024 the incidence within the industrial sector is 14.1%, and total planned demand amounts to nearly 6,800 positions. In absolute terms, demand is highest in the food, beverages and tobacco industries (2,300 positions – one in three immigrant hires), in metallurgy and metal products (1,070 positions, about 15% of the total), in the manufacture of machinery and equipment and of transport equipment (930 positions), and in the textiles, clothing and footwear industries (690 positions). The industrial branches with the highest incidences of foreign entries – though not always large in absolute terms – are household goods, leisure goods and other manufacturing (27.6% of planned entries but only 80 positions), the manufacture of non-metallic mineral products (19.9% but 270 positions), the chemical, pharmaceutical and petroleum industries (17.9%, 70 positions in total), and the manufacture of machinery and equipment and of transport equipment (17.0%). A slightly above-average incidence is also found in the textiles, clothing and footwear industries (15.2% of planned entries).

In Trade, retail (3,540 positions) and wholesale (2,940) together account for over 92% of the sector's total demand, while the incidence over total planned entries is slightly higher in the sale and repair of motor vehicles and motorcycles.

Within business services, demand for immigrant workers equals 17.0% of total planned hires. In Apulia, demand from enterprises operating in operational services reaches almost one quarter of the total (23.1%) in 2024 and is also the highest in absolute terms (nearly 6,000 positions). The transport, logistics and warehousing branch likewise shows a higher share of foreign hires, at 19.5% (i.e. one in five planned entries) and a large headcount (3,910 positions). Together, these two branches account for almost 90% of demand.

In personal services, the incidence of demand for immigrant personnel falls to 11.3%. The highest value, both in terms of incidence and in absolute numbers, is observed in health, social care and private health services, where 13.3% of planned entries are for foreign workers, totalling 2,410 positions.

Table 6 – Planned hires by enterprises and number of immigrant hires by sector. Apulia. Year 2024. Absolute values and percentage incidence.

SECTOR	Planned hires	Immigrant hires	% immigrants
Industry	**48240**	**6790**	**14,1**
Food, beverages and tobacco industries	16190	2300	14,2
Metallurgy and metal products industries	8600	1070	12,4
Manufacture of machinery and equipment and transport equipment	5480	930	17,0
Textiles, clothing and footwear industries	4510	690	15,3
Public utilities (energy, gas, water, environment)	5140	660	12,8
Manufacture of non-metallic mineral products	1360	270	19,9
Wood and furniture industries	2420	250	10,3
Electrical, electronic, optical and medical-device industries	1430	190	13,3
Paper, paper-converting and printing industries	1030	150	14,6
Rubber and plastic products industries	930	110	11,8
Household goods, leisure goods and other manufacturing industries	290	80	27,6
Chemical, pharmaceutical and petroleum industries	390	70	17,9
Mining and quarrying	480	30	6,3
Construction	**36590**	**8010**	**21,9**
Trade	**59530**	**7080**	**11,9**
Retail trade	32910	3580	10,9
Wholesale trade	22610	2940	13,0
Sale and repair of motor vehicles and motorcycles	4000	560	14,0
Accommodation and food service activities; tourism services	**81030**	**16240**	**20,0**
Business services	**65680**	**11160**	**17,0**
Operational support services to businesses and individuals	25760	5960	23,1
Transport, logistics and warehousing services	20080	3910	19,5
Advanced business support services	11740	800	6,8
Information and telecommunications services	5430	320	5,9
Financial and insurance services	1770	140	7,9
Media and communication services	910	40	4,4
Personal services	**41560**	**4690**	**11,3**
Health, social care and private health services	18170	2410	13,3
Cultural, sports and other personal services	18260	1940	10,6
Private education and training services	5140	350	6,8
PUGLIA	**332630**	**53970**	**16,2**

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

3.4 Occupations

In Apulia in 2024, enterprises' demand for immigrant personnel – relative to total planned entries – concerns mainly skilled manual workers and elementary occupations, for which the incidence stands at around 21% of total demand (each). The next two broad groups, at similarly sized percentages (around 16%, both essentially in line with the regional average of 16.2%), are plant and machine operators and drivers and skilled occupations in commerce and services.

Overall, the more highly qualified professions display markedly lower demand and lower incidences of foreign nationals over total planned entries.

Table 7 – Planned hires by enterprises and number of immigrant hires by occupation (major groups). Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS – MAJOR GROUPS	Planned hires	Immigrant hires	% immigrants

Managers (administrators, directors and executives in private enterprises	270	10	3,7
Intellectual, scientific and highly specialised professions	13780	1160	8,4
Technical occupations	31180	2530	8,1
Clerical employees	22560	2190	9,7
Skilled occupations in commerce and services	114400	18120	15,8
Skilled manual workers	**54040**	**11640**	**21,5**
Plant and machine operators and drivers	35270	5600	15,9
Elementary occupations	**61150**	**12730**	**20,8**
PUGLIA	**332630**	**53970**	**16,2**

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

Analysing the main profiles most in demand within the broad groups – ordered by the size of demand for immigrant workers – several findings emerge.

- Skilled occupations in commerce and services: the demand for immigrant workers in Apulia is 18,120 positions. There is demand for over 5,600 contracts for waiters/waitresses (over 30% of the group total), 3,530 planned hires for cooks in hotels and restaurants (19.5%), 3,360 retail sales assistants (18.5%), and 2,020 food preparation, cooking and serving assistants. For this latter occupation, demand for foreign workers accounts for about 50% of total demand. Taken together, the top four occupations in absolute terms absorb 80% of demand within the group. In terms of incidences, no particular specialisations in demand for foreign-origin workers are observed apart from those already noted: compared with the regional average (16.2%), demand is higher for childcare attendants (320 positions; 27.8% of total entries), skilled occupations in health and social services (970 positions; roughly 1 in 5 hires), fuel station attendants (140 positions; 24.6% of total), and cooks in hotels and restaurants (24.5% for this profile).

Table 8 – Planned hires by enterprises and number of immigrant hires in the major group "Skilled occupations in commerce and services", by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
Waiters/waitresses	30450	5630	18,5
Cooks in hotels and restaurants	14380	3530	24,5
Retail sales assistants	30760	3360	10,9
Food preparation, cooking and serving assistants	4070	2020	49,6
Bartenders	12780	1010	7,9
Skilled occupations in health and social services	3920	970	24,7
Childcare attendants	1150	320	27,8
Hairdressers	2850	310	10,9
Wholesale sales assistants	2620	200	7,6
Fuel station attendants	570	140	24,6
Private security guards	750	140	18,7
Personal care workers	2060	140	6,8
Cashiers in retail outlets	1030	90	8,7
Lifeguards	2380	80	3,4
Beauticians and make-up artists	1170	70	6,0
Customer information and assistance clerks	390	50	12,8
Door-to-door and distance salespersons	1560	40	2,6
Funeral agency workers	360	30	8,3
Sales organisers	520	10	1,9

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

- Elementary occupations, the second-largest broad group with 12,730 planned immigrant entries in 2024 (and also the second by incidence over total demand), show the following standouts: 4,340 hires of cleaners in offices/retail establishments (about 20% of all planned entries and 34.1% of the group), 1,790 cleaners in accommodation services and on ships (almost half of all planned entries for this occupation and 14.1% of elementary occupations), and 1,530 elementary packing and warehouse workers (12% of the group). Taken together, the top three occupations account for 60% of the group total. Although smaller in absolute terms, there is a notable share of immigrant hires in the total planned entries by Apulian firms for grounds-maintenance workers (860 positions, 55.8% of demand), agricultural labourers (150 positions, 48.4% of demand), and freight handlers and material movers (860 positions, 40.6% of demand).

Table 9 – Planned hires by enterprises and number of immigrant hires in the major group “Elementary occupations”, by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
Unskilled cleaning staff for offices/commercial establishments	21960	4340	19,8
Unskilled accommodation and ship cleaning personnel	3740	1790	47,9
Unskilled packaging and warehouse personnel	11640	1530	13,1
Unskilled personnel assigned to green-space maintenance	1540	860	55,8
Porters, freight handlers	2120	860	40,6
Unskilled catering personnel	5110	850	16,6
Construction labourers and other unskilled civil building workers	2450	750	30,6
Unskilled personnel assigned to custodial services for buildings/equipment/assets	2710	620	22,9
Sanitation workers and other waste collectors and sorters	3040	280	9,2
Unskilled personnel in industrial activities	2170	250	11,5
Delivery personnel	2290	230	10,0
Agricultural labourers	310	150	48,4
Unskilled staff in recreational and cultural services	840	140	16,7
Vehicle washers	450	60	13,3
Unskilled animal care personnel	10	10	100,0

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

- Skilled manual workers show the highest incidence of immigrant workers, at 21.5% of total demand, corresponding to 11,640 positions. There are 3,100 requests for foreign bricklayers (26.6% of the group total), followed by 1,280 farmers and specialised agricultural workers in woody/arboreal crops, who account for 11% of the group and have a 41.0% foreign-worker share of total demand for this occupation. Electricians in building construction, pastry chefs, ice-cream makers and artisanal preservers, metal-structure assemblers, and industrial machinery mechanics and assemblers each represent shares between 7.4% and 5.5%. The foreign share of regional demand is 31.5% for pastry chefs and 27.5% for mechanics. Although absolute numbers are small, immigrant incidences of 100% of total demand are observed for scaffolders and for goldsmiths and jewellers (40 and 20 planned entries, respectively). Planned contracts for foreign workers are also very high for painters, plasterers, lacquerers and decorators (290 of 300 planned entries; 96.7%), floor layers and covering installers (80 of 90; 88.9%), sewer-system maintenance workers (40 of 50; 80%), stone cutters, stone carvers and marble workers (160 of 280; 57.1%), reinforced-concrete masons (130 of 240; 54.2%), and laundry workers and hand embroiderers (20 of 40; 50.0%).

Table 10 – Planned hires by enterprises and number of immigrant hires in the major group “Skilled manual workers”, by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
Stone, brick and refractory masons	14400	3100	21,5
Farmers and specialised agricultural workers in woody/arboreal crops	3120	1280	41,0
Electricians in building construction	5840	860	14,7
Pastry chefs, ice-cream makers and artisanal preservers	2220	700	31,5
Metal-structure assemblers	3590	660	18,4
Industrial machinery mechanics and assemblers	2330	640	27,5
Installers and repairers of electrical and electromechanical equipment	2490	460	18,5
Carpenters and joiners in construction (excluding parquet layers)	1640	390	23,8

Plumbers and water/gas pipe installers	1260	330	26,2
Tailors and artisanal cutters, pattern makers and hatters	1550	320	20,6
Automotive mechanics, repairers and maintenance technicians	1650	320	19,4
Painters, plasterers, lacquerers and decorators	300	290	96,7
Assemblers/erectors of prefabricated and preformed components	590	270	45,8
Dry-cleaning and laundry artisans and workers	990	250	25,3
Electric-welding specialists (ASME standards)	920	240	26,1
Carpenters and set-up technicians for woodworking machinery	1880	170	9,0
Stone cutters, stone carvers and marble workers	280	160	57,1
Window and door frame installers	580	160	27,6
Bakers and artisanal pasta makers	1700	150	8,8
Reinforced-concrete masons	240	130	54,2
Butchers and fishmongers	680	90	13,2
Floor layers and covering installers	90	80	88,9
Plasterers	250	80	32,0
Artisanal dairy-processing craftsmen and skilled workers	510	70	13,7
Electric line installers, repairers and cable layers	530	70	13,2
Sheet-metal workers	300	60	20,0
Machine-tool setters	470	60	12,8
Welders and flame cutters	830	50	6,0
Scaffolders	40	40	100,0
Sewer-system maintenance workers	50	40	80,0
Goldsmiths and jewellers	20	20	100,0
Laundry workers and hand embroiderers	40	20	50,0
Farmers and specialised agricultural workers in gardening/nurseries and in the cultivation of flowers, plants and vegetables	260	20	7,7
Offset and rotary-press printers	50	10	20,0
Hygiene and cleaning service workers	80	10	12,5
Ship mechanics and fitters	510	10	2,0

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

- In 2024, Apulian firms expressed demand for 5,600 plant and machine operators and drivers. Among these, heavy-goods vehicle and truck drivers account for the largest share, with demand for 2,610 positions (46.6% of the total). They are followed by operators of industrial product packaging machines with 580 positions (10.4% of the total), operators of machinery for the processing/preservation of fruit/almonds/vegetables/legumes/rice and operators of machinery for pastry and bakery products with 360 and 290 positions respectively (6.4% and 5.2% of the total).

Table 11 - Planned hires by enterprises and number of immigrant hires in the major group “Plant and machine operators and drivers”, by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
Heavy-goods vehicle and truck drivers	16270	2610	16,0
Operators of industrial product packaging machines	2020	580	28,7
Operators of machinery for the processing/preservation of fruit/almonds/vegetables/legumes/rice	2170	360	16,6
Operators of machinery for the production of pastry and bakery products	1290	290	22,5
Operators of industrial machines for apparel manufacturing (fabric and related)	840	190	22,6
Deckhands	400	160	40,0
Operators of automatic and semi-automatic industrial machine tools	1120	150	13,4
Operators of machinery in series-production plants for furniture/wood articles	370	120	32,4
Earthmoving machinery operators	1630	120	7,4
Forklift operators	580	100	17,2
Operators of olive-processing plants	1290	90	7,0
Assembly-line workers for articles in metal, rubber and plastics	530	80	15,1
Motorboat operators	80	70	87,5
Other assembly-line and mass-production workers of industrial articles	150	70	46,7
Other machine operators in the textile and apparel industry	310	70	22,6
Operators of plants for the refining of petroleum products	60	60	100,0
Automated assembly-line operators	500	60	12,0

Bus, tram and trolleybus drivers	930	60	6,5
Mobile drilling-machine operators in construction	60	50	83,3
Operators of machinery for the manufacture of plastic articles and related products	310	50	16,1
Crane and lifting-equipment operators	340	50	14,7
Operators of mechanical looms for weaving and knitting	50	30	60,0
Assembly-line workers of wooden and related articles	180	30	16,7
Operators of machinery for the production of concrete products and related items	60	20	33,3
Train drivers	80	20	25,0
Plant operators in waste recovery/recycling and water treatment/distribution	110	20	18,2
Operators of machinery for mass production of footwear	110	20	18,2
Operators of machinery for the manufacture of paper and cardboard products	240	20	8,3
Operators of machinery for meat and fish processing and preservation	240	20	8,3
Operators of plants for the first processing of minerals and stone	10	10	100,0
Mill and dough-mixer operators	10	10	100,0
Agricultural tractor drivers	10	10	100,0
Winemakers, brewers, and operators of machinery for the preparation of spirits/soft/carbonated drinks	60	10	16,7
Operators of industrial processing equipment for dairy products	350	10	2,9
Operators of industrial machinery for processing cereals/spices/cereal-based products	550	10	1,8

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

- Technical occupations: totalling 2,530 positions, with the largest numbers in nursing and midwifery health professions (520 positions; 20.5% of the group total) and rehabilitation health professions (260 positions; 10.3%). Given the group's small size, it is worth noting a prevalence of demand for immigrant personnel among physics technicians and geologists (10 planned positions, all for foreign workers), technical health professions in the technical-assistance area (70 out of 120 planned entries), specialised guides and escorts (10 out of 20), and other technical health professions (70 out of 150).

Table 12 – Planned hires by enterprises and number of immigrant hires in the major group “Technical occupations”, by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
Nursing and midwifery health professions	2300	520	22,6
Rehabilitation health professions	4550	260	5,7
Sales and distribution technicians	4070	180	4,4
Non-competitive sports instructors	480	170	35,4
Manufacturing production technicians	540	120	22,2
Social reintegration and inclusion technicians	720	120	16,7
Construction site management technicians	1990	120	6,0
Industrial designers	820	110	13,4
Applications specialists	1140	110	9,6
Accountants	1940	100	5,2
Technical health professions – technical-assistance area	120	70	58,3
Other technical health professions	150	70	46,7
Food production and preparation technicians	180	70	38,9
Service production technicians	510	60	11,8
Tourist entertainers	190	50	26,3
Web technicians	510	50	9,8
Electronics technicians	300	40	13,3
Technician programmers	750	40	5,3
Athletes	110	30	27,3
Civil engineering technicians	180	30	16,7
Financial management technicians	270	30	11,1
Mechanical technicians	510	30	5,9
Network and telematics systems administrators/technicians	50	20	40,0
Information transfer and processing technicians	50	20	40,0
Real estate agents	120	20	16,7
Marketing technicians	700	20	2,9
Physics and geology technicians	10	10	100,0

Specialised guides and escorts	20	10	50,0
Electrotechnicians	190	10	5,3
Procurement officers and purchasing managers	280	10	3,6
Insurance agents	320	10	3,1
Social workers	330	10	3,0
Vocational training teachers	1390	10	0,7

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

- Clerical employees: with 2,190 immigrant hires planned, the most in-demand occupations are general affairs clerks and front-office clerks for the collection of taxes/contributions and debt recovery (460 and 430 positions; 21.0% and 19.6% of the group total). These are followed by information operators in call centres (non-sales) and reception and information clerks in firms and public bodies (270 and 200 positions). Here too, a closer look at incidence values shows higher demand for foreigners in certain occupations, such as front-office clerks for the collection of taxes/contributions and debt recovery (10 out of 10 planned positions), switchboard operators (110 out of 160), and, again, front-office clerks for the collection of taxes/contributions and debt recovery (430 out of 640).

Table 13 – Planned hires by enterprises and number of immigrant hires in the major group “Clerical employees”, by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
General affairs clerks	5560	460	8,3
Front-office clerks for the collection of taxes/contributions and debt recovery	640	430	67,2
Call-centre information operators (non-sales)	2980	270	9,1
Reception and information clerks in firms and public bodies	3220	200	6,2
Warehouse management clerks	1430	190	13,3
Secretarial clerks	2500	190	7,6
Reception clerks in accommodation and food service activities	2690	120	4,5
Switchboard operators	160	110	68,8
Control and inspection staff	160	50	31,3
Travel agency counter clerks	250	50	20,0
Travel documentation control clerks	260	40	15,4
Insurance, banking and other financial counter clerks	400	40	10,0
Human resources clerks	200	20	10,0
Financial operations clerks for the enterprise/organisation	10	10	100,0
Accounting clerks	840	10	1,2

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

- Intellectual, scientific and highly specialised professions: firms expressed demand for 1,160 immigrant hires. Within this group, the distribution is less concentrated: the top ten occupations account for 80% of the total. In order of size, these are: software analysts and designers (170), teachers of artistic and literary subjects (140), specialists in economic sciences and specialists in market relations (110 each), pre-primary school teachers (90), civil engineers (80), choreographers and dancers (70) and directors, artistic directors, actors, screenwriters and set designers (60), pharmacists and industrial and management engineers (50 each). Note that, although small in absolute terms, demand for choreographers and dancers represents 100% of planned entries for that occupation.

Table 14 – Planned hires by enterprises and number of immigrant hires in the major group “Intellectual, scientific and highly specialised professions”, by occupation. Apulia. Year 2024. Absolute values and percentage incidence.

OCCUPATIONS	Planned hires	Immigrant hires	% immigrants
Software analysts and designers	1010	170	16,8
Teachers of artistic and literary subjects	430	140	32,6
Specialists in economic sciences	340	110	32,4
Specialists in market relations	680	110	16,2
Pre-primary school teachers	960	90	9,4
Civil engineers	1070	80	7,5

Choreographers and dancers	70	70	100,0
Directors, artistic directors, actors, screenwriters and set designers	910	60	6,6
Pharmacists	860	50	5,8
Industrial and management engineers	1120	50	4,5
Management and control specialists in private enterprises	320	40	12,5
Medical therapy specialists	90	30	33,3
Energy and mechanical engineers	400	30	7,5
Composers, musicians and singers	400	30	7,5
Teachers and experts in educational and curriculum design	400	20	5,0
Chemists	60	10	16,7
Physicists and astronomers	70	10	14,3
Systems designers and administrators	80	10	12,5
Accounting and financial specialists	160	10	6,3
Information engineers	280	10	3,6
Legal experts in enterprises or public bodies	360	10	2,8
Public relations and image specialists	400	10	2,5

Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

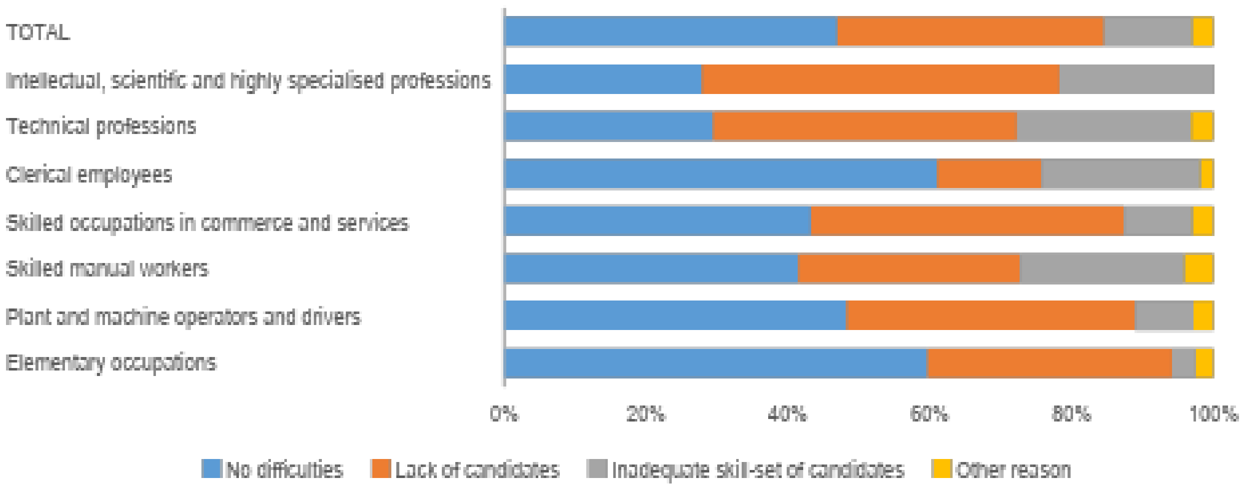
3.5 Recruitment difficulties by occupation

This section assesses recruitment difficulties relating to foreign workers, with the aim of identifying the occupations for which firms report the greatest challenges in matching labour demand and supply, and the reasons behind them.

Overall, no obstacles are reported for just under 47% of the foreign workers firms would need; consequently, more than half of planned entries are subject to some recruitment difficulty. In detail, 37.6% of demand is hard to fill due to the limited number of candidates, and 12.4% due to candidate inadequacy; the share attributable to other reasons is residual (3.0%).

These difficulties vary by occupation: as shown in the chart, for example, in the clerical employees and elementary occupations groups the share of immigrant personnel for which no recruitment difficulty is reported is very high – rising to around 60% of the total – whereas intellectual, scientific and highly specialised professions and technical occupations are harder to fill, especially because of the limited number of candidates.

Figure 18 – Planned immigrant hires by recruitment difficulty and major occupational group. Apulia. Year 2024. Percentages.



Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

In this overall picture, however, it is necessary to consider the differing weight each group carries in total demand: while demand for skilled professions shows fewer recruitment difficulties, as noted, labour demand in Apulia is concentrated on other types of qualifications and occupations.

Analysing the main profiles most in demand within the broad groups – ordered by the incidence of demand for immigrant workers over total planned contracts – several findings emerge. We focus here on the last four groups, which are the most significant in terms of both headcount and incidence of demand for foreign workers.

Skilled manual workers. Not only is the incidence of demand for immigrant personnel 21.5% – the highest value – but the share of planned contracts exposed to recruitment difficulties is also higher than the Apulian average. In particular, the share of hard-to-fill due to candidate inadequacy is higher (23.2%), even though the main reason remains the limited number of candidates (31.3%). Considering those occupational profiles that are relatively most requested by firms and that show high recruitment difficulties, the standout professions are goldsmiths and jewellers, floor layers and covering installers, and stone cutters, stone carvers and marble workers: all planned entries for these profiles in 2024 are hard to fill, mainly due to candidate inadequacy, which prevents an effective match between supply and demand. Another occupation with both high incidence and high recruitment difficulty – though not equal to 100% of entries – is sewer-system maintenance workers; here the main reason is the limited number of candidates.

Elementary occupations. The second-largest group by incidence of demand for foreign workers shows a substantially different picture from skilled manual workers. The share of planned entries for which firms encounter a recruitment difficulty is about 40% of the total, due to the limited number of candidates. It is unsurprising that the bottleneck relates to scarcity rather than quality, given these are, by definition, non-qualified occupations. In detail, demand for immigrant workers is high and hard to fill for cleaners in accommodation services and on ships – an occupation for which demand from foreign workers accounts for nearly half of all planned entries (1,790 out of 3,740) – and the reason for difficulty is scarcity of supply (57.5% of positions). Freight handlers and material movers also show a relatively high incidence (40.6% of planned entries are for foreign workers) and a recruitment difficulty attributed to the limited number of candidates (61.6% of positions). Due to scarcity of supply, Apulian firms also consider construction labourers and other elementary occupations in civil building hard to fill, accounting for 30.6% of total demand.

Plant and machine operators and drivers. Recruitment difficulties for immigrant workers are below the regional average and, where present, are caused by scarcity of candidates (40.7% of demand). Among the occupations for which firms struggle to find matches are operators of plants for the first processing of minerals and stone, operators of plants for the refining of petroleum products, and mill and dough-mixer operators: in these profiles – though small in absolute numbers – immigrant demand equals 100% of total planned entries and all requested positions are subject to recruitment difficulties due to scarce supply. The entire demand for foreign workers is also hard to fill for mobile drilling-machine operators in construction and operators of mechanical looms for weaving and knitwear – profiles with immigrant-entry incidences of 83.3% and 60%, respectively – although absolute numbers are small. More substantial numbers concern operators of machinery in series-production plants for furniture/wood articles: the 120 positions requested by firms are for immigrant workers (32.4% of total entries) and all are considered hard to fill. Finally, the profile of operators of machinery for the production of pastry and bakery products shows foreign-worker demand equal to 22.5% of total entries; in absolute terms this is 290 positions, 270 of which are hard to fill.

Skilled occupations in commerce and services. Here, recruitment difficulties for immigrant personnel concern about 57% of profiles. Hard-to-fill positions exceed 70% – but remain below 80% – for cooks in hotels and restaurants, bartenders, door-to-door salespersons, and beauticians/make-up artists: however, while for the first three profiles the difficulty stems from scarcity of supply, for the last one the main reason is candidate inadequacy. The share of demand exposed to recruitment difficulties concerns two out of three immigrant workers in the profiles of hairdressers, cashiers in retail outlets, and waiters; difficulties are somewhat lower – but still around one in two immigrant workers – for personal care workers, wholesale sales assistants, and food preparation, cooking and serving assistants. It is worth recalling that this latter profile also shows relatively high demand for foreign workers (2,020 immigrant hires out of 4,070 planned entries, 49.6%).

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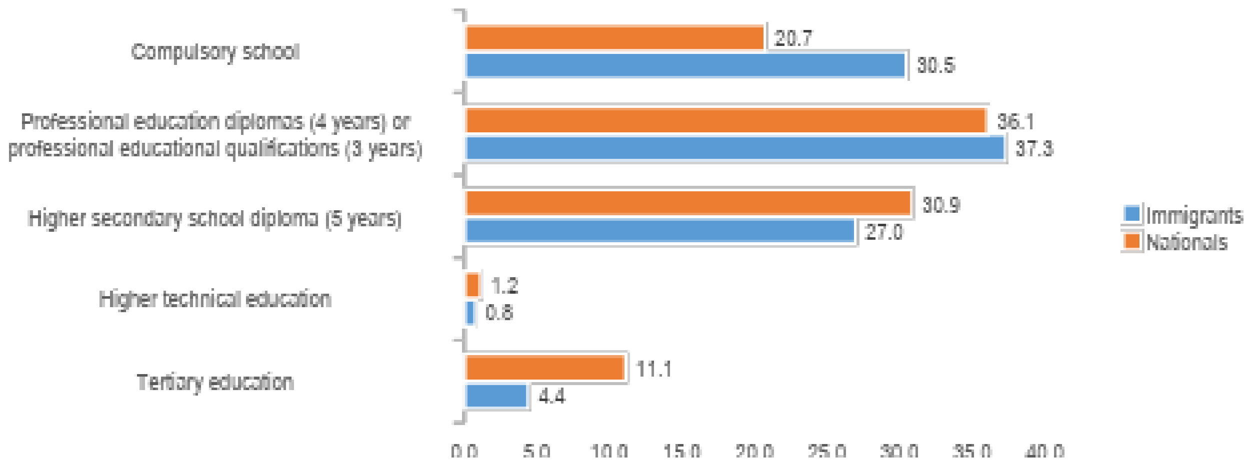
3.6 Training and skills required of immigrant workers

Evidence on firms' needs can be broken down – not only by sectoral demand and occupational qualifications – but also by the levels of education and the skills required of workers of immigrant origin. This analysis compares whether firms require foreign workers to hold specific educational qualifications and skills relative to other workers.

Considering education levels, some specific features emerge. Overall in Apulia, hires for which a vocational qualification or diploma is required account for the majority for both foreign workers (37.3%) and Italian workers (36.1%): no differences therefore emerge between the two groups. Nor are there large differences in demand for upper-secondary graduates: for foreign workers, planned entries linked to roles requiring upper-secondary diplomas amount to about 14,500, or 27.0% of all immigrant hires, while among Italians the share rises to 30.9%. Entries requiring higher technical education (non-tertiary, delivered by Higher Technical Institutes, *ITS*) are residual in both groups.

While the mid-range qualifications show a certain balance between demand for immigrant and non-immigrant workers, the differences become significant at the extremes of the distribution. At the lower end – profiles with only compulsory schooling – there is a gap of 9.8 percentage points between the share of immigrant entries (30.5%) and that of non-immigrants (20.7%). At the opposite end, the demand for immigrant personnel with a tertiary qualification, equal to 4.4% of total demand for immigrant workers, is markedly lower than for Italians (11.1%). In short, the profile is broadly balanced in the middle bands and skewed at the high- and low-education extremes.

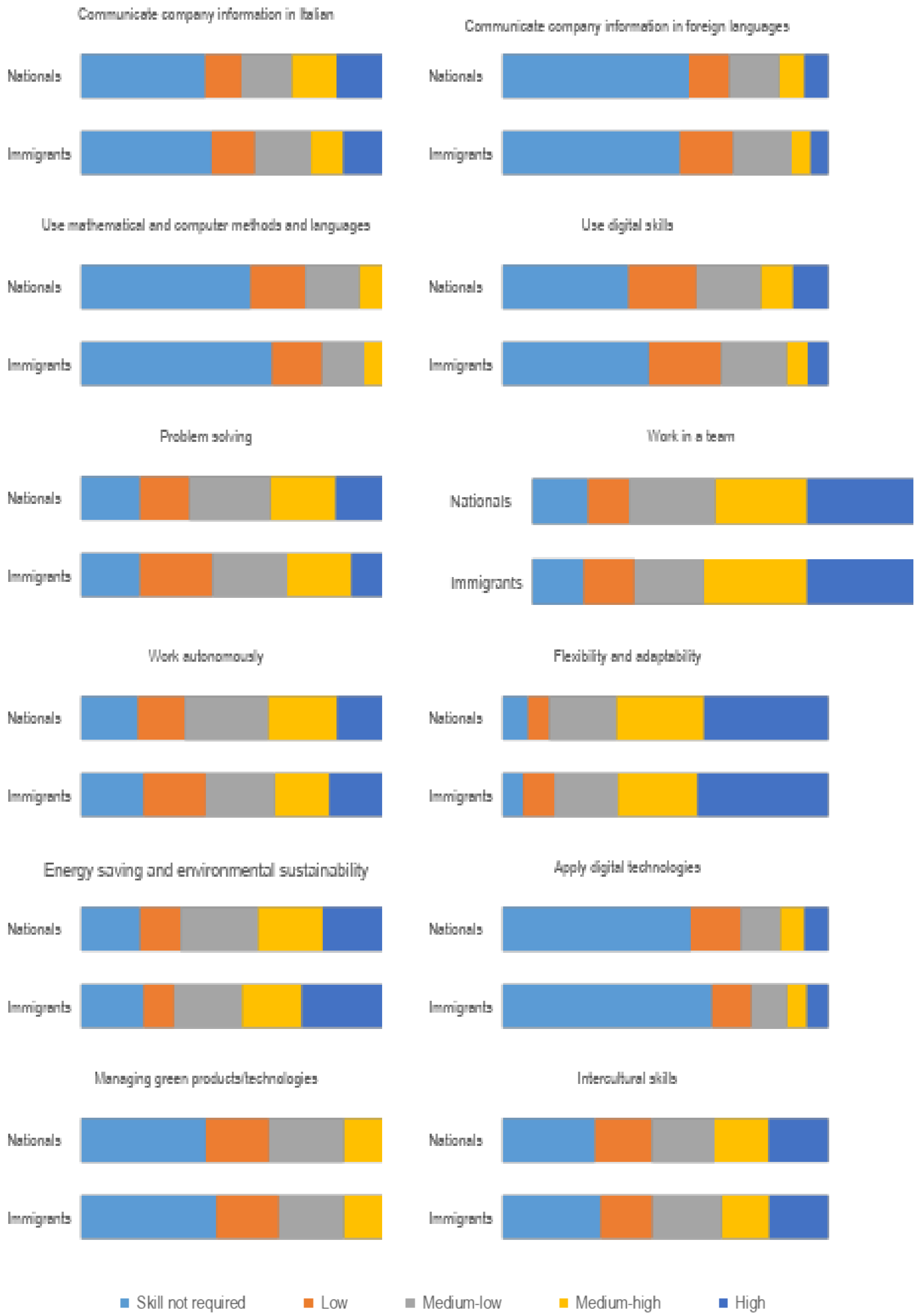
Figure 19 – Immigrant and non-immigrant hires by required educational attainment. Apulia. Year 2024. Percentages.



Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

If we examine the skills most requested by enterprises, it generally emerges that, for foreign workers, the importance attached to possessing them is somewhat less pronounced than for Italian workers, because expectations regarding workers' skills tend to be lower in less-qualified occupations - that is, those with a greater presence of and demand for foreign labour. Among the skills considered more relevant for foreign workers than for Italians, two stand out: an energy-saving mindset (50.6% of foreign workers and 45.7% of Italians) and the ability to work in a team (58.6% and 55.8%, respectively). A detailed overview of the skills and their required levels (from "skill not required" to "high level required") is shown in the figure.

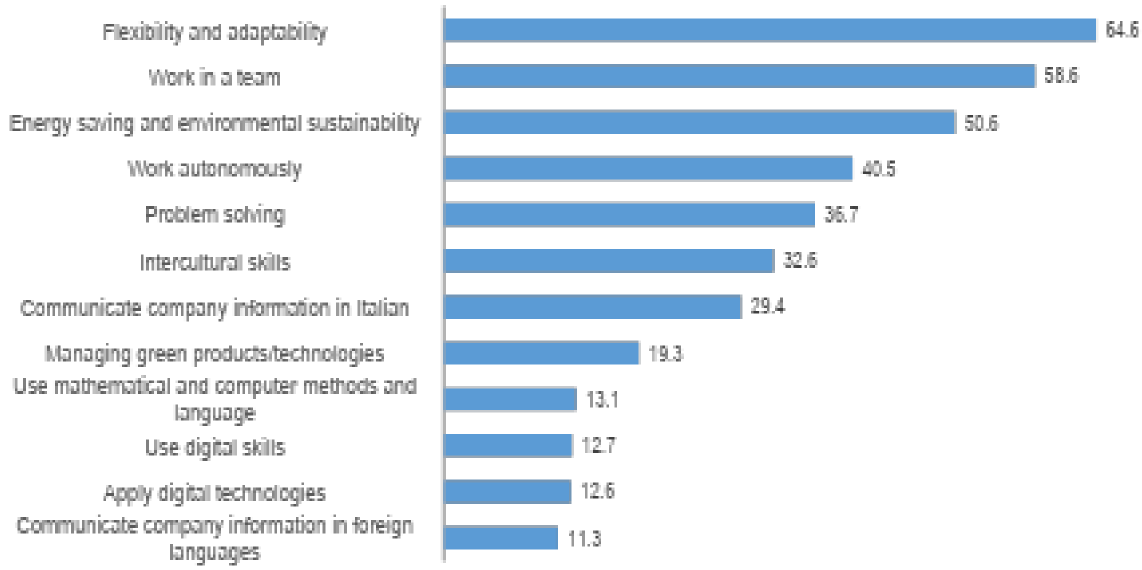
Figure 20 – Planned immigrant and non-immigrant hires by skills and required level. Apulia. Year 2024. Percentages.



Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

Which skills are those for which the level required of immigrant workers is high, i.e. high or medium-high? Ranking immigrant-worker shares by the proportion for which a high level is required, in 2024 firms in Apulia expressed demand for immigrant workers with high flexibility and adaptability, ability to work in a team, and an energy-saving mindset, with shares exceeding 50% of total demand. Firms in Apulia also seek staff able to work autonomously (40.5%), with problem-solving skills (36.7%) and intercultural skills (32.6%). Conversely, high proficiency in foreign-language communication (11.3%), the ability to apply digital technologies and advanced digital skills (12.6% and 12.7%), as well as mathematical and IT skills (13.1%), are not considered necessary.

Figure 21 – Planned immigrant hires with a “high” required skill level, by type of skill. Apulia. Year 2024. Percentages.



Source: Unioncamere – Ministero del Lavoro e delle Politiche Sociali, Excelsior Information System 2024

Chapter 4

Interviews with representatives of the employer community

4.1 Introduction to the chapter

As explained in the introduction regarding the research design, it was considered appropriate to complement the quantitative analysis with a qualitative deep-dive, in order to complete the knowledge base and clearly bring out the dynamics underlying how Apulia's labour market functions for foreign nationals. What are the main obstacles to accessing decent work? What motivates firms to hire foreign labour? How are workers recruited? What are the employment-support services for foreigners and how do they work? What should be done to improve the labour-market inclusion of these people? Do current Italian migration policies effectively meet the needs of businesses and workers?

These are only some of the questions put to key informants during in-depth interviews. In particular, we heard from representatives of Apulia's employers' associations (Confindustria Puglia, Confartigianato Puglia, Legacoop Puglia, Coldiretti Puglia), who offered their valuable perspectives.

On the demand side, then, we gathered the views of those representing large and small enterprises, the cooperative world and agricultural businesses. On the supply side, as we will see in the next chapter, we chose – using the focus-group technique – to listen to the main associations in Apulia, and especially in Bari, that provide reception services for migrants and support their local and labour-market integration. This comparison also brought out highly relevant aspects that completed and enriched our understanding.

In this chapter, we report on the interviews with representatives of the employer community.

4.2 Immigration as a resource and future labour needs

All interviewees broadly agree that immigration and the presence of foreign workers in our region are a resource. According to AA, for example, already now – but even more so in the near future – firms will need foreign labour, increasingly skilled, which should be supported and trained, starting with help to overcome language and cultural barriers. In AA's words: "I think that [the foreign worker, editor's note] is a great resource. I think we should follow Germany's example and require intensive teaching of the Italian language, rather than intervening only with evening classes for adults as in Italy. I say we need very intensive lessons to get them to learn Italian quickly, because school has endless timelines for teaching the language and local legislation… In my view, we need to push a bit more on education as well as training to strengthen literacy and knowledge of Italian legislation – so they understand what their rights are, but also what their duties are. You don't come to Italy and have only rights – you also have duties."

AC likewise considers foreign workers a resource: "In the crafts sector they are definitely a resource, because we are seeing a marked depletion of the pool that supplies craft and micro-enterprises." For AC, this is not only the consequence "of the demographic problem" but, he says, “there is clearly a cultural issue, and for this reason we are pushing hard for the concrete adoption of tools such as first-level apprenticeships, because it is difficult to have an impact on educational institutions… The education system should be improved to allow those who do not intend to pursue certain [study] pathways to open up opportunities for training and work.”

AB also emphasises labour needs in the coming years: “In a few years we will have problems with production because there is no longer the labour force – neither low-skilled nor skilled… I have also had direct experiences with cooperative member farmers who told me that, for example, this year they will not carry out certain productions because labour is unavailable: for example fresh produce – peas, broad beans, etc. These are all products that, if you want to sell them fresh, cannot be mechanised. And so there we will have serious problems. But also in other sectors, not only agriculture – construction, which is talked about a lot, etc. – we know there is a shortage of labour, especially skilled labour, because we are talking about jobs that require professionalism.”

For AD: “Apulia has always paid attention to foreign workers, because it has always needed foreign workers. A large part of its activity and development has been built on foreign labour, agriculture first and foremost.” In fact, during the interview AD adds: “Today we don’t have a supply of Italian labour; there are no Italian workers today – or only a few – who want to engage in major harvests. Italians fundamentally choose, and think that other sectors are more suited to their lifestyle, to a more comfortable model of life.” And again: “The seasonality of harvests,” says AD, “has led many people to move from other parts of Italy to come to Apulia to work, because there is, in a way, a great capacity to welcome… Lately the availability of labour has been decreasing; so firms now need to recruit workers. We need a regulatory system that allows this. And agriculture today needs fewer workers without skills and more skilled workers.”

The theme of seeking skilled labour thus returns forcefully in AD’s reasoning. However, AD also specifies the difficulties in providing training – even on the job – in agriculture: “When each year – even within a seasonal cycle, if you will – you have the same people whom you train and structure, and who repeat a job, they have the chance to improve at that job year after year. In this way you professionalise people, including at an operational level. Unfortunately this is not always possible, it is not always happening, and this is a serious problem for firms, which very often suffer from a lack of manpower and do not get the responses they need.”

AC frames the problem of recruiting labour within an already worrying context and goes so far as to see the activation of foreign workers as one possible solution to these structural criticalities: “There is a very serious problem,” he says, “which all the trade associations have highlighted: we face the major challenge of the ‘demographic winter’, of the failure to activate the female component, and also of activating the non-EU workforce. Not for political reasons… but – speaking plainly – [foreigners, editor’s note] are the only element we can count on to look thirty years ahead. In the crafts sector we are facing a projected decline in workers and labour exceeding 30% over twenty years, and we are already experiencing it now. Demand for foreign labour will certainly grow.”

AC goes on: “In the crafts sphere – which, in terms of product categories, is extremely broad and cross-cutting – the sectors where we see the strongest presence of non-EU workers are certainly construction and catering. There is also strong demand in vehicle repair and in freight transport. And especially in these sectors, there is demand for profiles not necessarily with medium-low qualifications, but also with qualifications that really entail specific skills… There are transport companies that shut down because they no longer have drivers – no drivers, no business. We know that entry [training/licensing] is costly. We are working on this and have discussed with the Region the possibility of a contribution towards obtaining a driving licence and the driver qualification."

With regard to skilled labour, AC also cites the example of ceramics firms that struggle to find throwers/turners: "…no one is taking up learning to operate a wheel or manage the firing of ceramics and terracotta anymore; this is a real need."

In other segments, by contrast – for example personal services – AC notes: "we have the opposite problem, namely an excess of labour, and this sector is also dotted with irregular phenomena."

In industrial sectors too there is strong demand for skilled labour, as AA reports: "Let me make a brief preface. From discussions with firms in my trade association, the problem that always emerges is the lack of qualified personnel. We have a serious problem because there are no people with the necessary competences. So the first thing I want to say, from a business standpoint, is that we need stronger training focused on the real skills the territory needs."

4.3 Training as a Key to Integration

ccording to our informant AB, a genuine process of integration brings together several aspects. Beyond identifying skills, he strongly reiterates the need to ensure serious and adequate training for foreign workers: "From my point of view, integration is not just a slogan; for us it is fundamental, and we are trying in every way to achieve it. We are trying to begin integrating these skills gradually in line with what the market requires. I must say we have had excellent results, because for example there was an experience in the Foggia area where – calmly, with a bit of initial training and then with continuous training – we achieved excellent results. People who come from other parts of the world are now essential for construction companies. For example, I met a site manager who went through the entire process and who is now, in fact, a site manager in one of our cooperatives, and this allowed me to imagine that the work we are trying to do will lead to results."

For AB, the key concept is that training must not be imposed from above: "Clearly, a lot of training is needed, and it is also necessary to share the needs of these people and the needs of businesses. So there is a very high level of joint planning, because otherwise – if there is no point of contact, no collaboration – you always have two separate worlds: a lower world and a higher world, and that is not good. From our point of view, things could be much, much more interesting."

Here AB is referring to labour-market segmentation processes, which are evident in Apulia as well. In this respect, the regional context does not differ from the dynamics of the Italian labour market, which trap most foreign workers in the humblest and riskiest jobs, almost never allowing qualitative or sectoral advancement in the work performed. AA likewise sees the main problem as the strong mismatch between company needs and the workers – including migrants – who apply, and he offers an instructive example: "In my role I had the chance to speak with the Director of Eni's Taranto refinery and asked which skills he needed, and he replied: we have management engineers, chemical engineers, engineers of every kind, but we don't have the 'soldiers', and the soldiers are the electrotechnicians and the welders. We don't have those profiles to do the work. We have people to design it, to plan it, but we don't have those who do the jobs – the skilled workers." According to AA, then, foreign workers are not sufficiently trained to perform these jobs, due to the contexts they come from. In his view, these workers are concentrated in the lowest tier of jobs: "because their level of education and experience is different from an Italian's… for Italians there has been a generational handover; someone coming from elsewhere does not have that cultural background passed on by society." He reiterates that the game changer is vocational training, which, in the interviewee's view, should also be tasked with matching demand and supply: "Doing this through training would be ideal, because if the firm is connected to the training institute, that's perfect. In this way you achieve a complete matching. Courses can also be directed toward companies' needs."

AB also confirms that the barriers trapping foreigners in the lowest-tier jobs can be overcome by enabling them to access training that is ever more useful and responsive to firms' demand. On this point he recounts: "I remember that a few years ago, when the Region invested in apartments for people arriving from other parts of the world, after a while those apartments, for various reasons, mostly fell into disrepair-abandoned, semi-destroyed, and so on. From that experience, having had the opportunity to meet the people who then lived in those apartments, I realised that what was missing was maintenance, because it was clear that those living there could not afford to call firms to carry out maintenance. That's why I proposed training the residents themselves to maintain their installations, because that training could then be useful in other companies as well."

In this sense, AB argues, institutions lack the ability to connect firms' needs to the training offered to workers – especially the most vulnerable, such as migrant workers. It follows that training for its own sake, not geared in some way to the real needs of the local economy, risks failing to provide the "protective" factor for workers that it should – helping them improve their situation and attain jobs that are more dignified in terms of rights and pay. As AB puts it: "We were not able to do this because the regional training process did not allow it, and that was one of the shortcomings of this story. So, in short, firms need these people, these 'pairs of hands', but they would also need 'heads' – that is, better-trained workers."

4.4 Evolution of the Agricultural Sector and New Skills

According to AD: "If we think about how agriculture is evolving looking ahead… we need to worry not only about having the labour force, but about **qualifying** it – giving it continuity so it can work over time." He adds: "If we consider today's new farming systems – the olive groves we are now planting using intensive systems, where harvesting may be mechanised… even there you need a different labour force from yesterday's: it's no longer about pruning olive trees and gathering fruit from the ground, but about knowing how to use the machines."

In AD's view, the agricultural sector is evolving to the point that, in the future, it "will require **less** human labour, but **more skilled**," which is why a pathway of continuous training is needed: "If we think of cowsheds," he adds, "the labour once needed to care for animals has now been replaced by machines – by computerised and robotised systems, even for milking. The approach to work is therefore much more technological and innovative. Today in the fields we have monitoring systems that use drones to assess data and determine whether to irrigate or not, to treat or not treat, based on a series of data the drone collects and a system processes… Clearly, the person driving a tractor today is no longer just a good driver; they also have screens, data and information at their disposal and, using apps and perhaps networked systems, manage everything technologically. So, naturally, there is an evolution – a **continuous training** trajectory we need to invest in."

Asked who provides this training today, AD replies that in agriculture there has, over the years, been appropriate and important attention to **safety** and **contracts**, but perhaps the **empowerment** of workers has been somewhat neglected – that is, their ability to improve and compete in the labour market through training, thereby escaping more menial and discontinuous tasks: "Some tasks are more easily replaceable, and others can instead qualify you so that you become a resource for the firm. It is not always easy for someone who arrives and has never done that job to get up to speed quickly – to be efficient enough to justify a normal employment pathway. It often takes a whole season to train a person to perform a certain job in a certain way."

Training, according to AD, is necessary at **all levels**, not only for the most highly qualified roles but also for those that **seem** simpler: "…in my view this is the new frontier we must begin – and continue – to work on," he adds. "Nor should we focus only on **vocational** training, but also on **cultural** training. The culture of work is not the same the world over, and these people need help to get in tune with the enterprise – not just thinking about being well paid, but feeling the company as somewhat their own. Constantly having different people does not help entrepreneurs build worker loyalty."

AD's reasoning also makes space for a very interesting point about investing more in a **social policy framework** around the worker. In his view, we should move from battles over wages to building a protective **network of services** around these workers: "We have a shortfall, perhaps, in what could be called **social policy around the worker**, who, by definition, arrives here without housing or the ability to get around. That makes them vulnerable. Creating a network of services around the worker – which perhaps has never been created – is a challenge. We have large 'villages'; we have **villages** in Lecce – i.e. unauthorised settlements – where these people gather, or all sorts of makeshift arrangements. I believe instead that we need a more structured network to receive the worker."

AD therefore calls for a genuine, organised **reception system**: "to prevent these people from finding themselves without a point of reference – and often finding one in people they should not rely on." In his view, this reception system should not be provided **only** by firms, but through **institutional projects and programmes** that nevertheless involve firms themselves: "Companies that routinely hire labour – I worked in the North – have a number of lofts, small studio apartments created ad hoc. We need to encourage and fund this; let's create the conditions so that firms, too, can provide at least a minimum standard of decent accommodation." Finally, he too cites the **Sankara** agricultural cooperative in the Foggia area – already mentioned by AB – as a virtuous example: "We have virtuous examples: a fine project, for instance, in Foggia with a cooperative of non-EU nationals together with the Region, to which we also contributed – we provided materials, the seedlings for the well-known tomato, a product that now also reaches our *Campagna Amica* markets. We also tried to provide, for example, coaches in the morning to pick people up and take them to the fields. We did not work alone, honestly, but together with the trade-union movement, and we cooperated to show that it can be done. The Region made an important contribution."

4.5 Best practice

Casa Sankara – An ethical tomato supply chain against exploitation

Casa Sankara was founded in San Severo (province of Foggia) as a social project run by a group of African migrants who, after experiencing exploitation in the agricultural ghettos of the Tavoliere plain, decided to build an alternative model based on regular employment, dignity and self-management. The name is inspired by the African leader Thomas Sankara, a symbol of independence and emancipation.

Origins and objectives
The association was set up by former farm labourers who had directly experienced the *caporalato* (gangmaster) system in the Foggia countryside. Casa Sankara represents a path to emancipation: offering migrants and refugees a safe place to live and work, and to launch sustainable farming activities.

The main objective is twofold: on the one hand, to produce tomatoes ethically and sustainably, countering the exploitation of agricultural labour; on the other, to build paths to autonomy for migrants through access to land, regular contracts and social inclusion.

The "La terra della libertà" tomato supply chain
On land granted by the Apulia Region, members grow tomatoes using traditional, environmentally respectful methods. The harvest is processed into peeled tomatoes and passata in partnership with Conserve Italia and distributed under the brand "La terra della libertà" ("The Land of Freedom"), evoking the break from the ghetto and illegality.

The products enter large-scale retail distribution thanks to partnerships with organisations such as Coop Alleanza 3.0, ensuring visibility and economic sustainability. The entire supply chain is traceable and certified: workers receive a decent wage and regular contracts, eliminating all illegal intermediation.

Social dimension
Casa Sankara is not only an agricultural project but also a residential community. It hosts hundreds of migrants, offering decent housing, basic services and integration pathways. In this way it overcomes the logic of ghettos and shanty settlements that too often characterise seasonal workers' living conditions.

Relevance
The project is a good practice in inclusion and social economy: it shows that tomatoes can be produced without exploitation; it gives migrants a voice as protagonists rather than passive beneficiaries; and it raises consumer awareness of the importance of a transparent supply chain.

4.6 Recruitment, Skills and Training of Foreign Workers

The integration of foreign workers into the Italian and Apulian labour markets hinges on three crucial and closely interconnected issues: recruitment methods, the identification of skills, and the need for training. These are fundamental steps which, however, often take place in a disorganised, partial or entirely absent manner, with consequences for both firms and the workers themselves.

Regarding recruitment, the interviews explored why firms tend to resort to foreign labour for less-skilled tasks. AB replies: "Let's say they have always done fifty-fifty between natives and foreigners, but that's because they can't find natives. That's the truth. The '50% natives' share keeps shrinking, because people who retire or otherwise leave work are never replaced by young people. Of course that's the problem, because it's work they don't want to do – and so we should ask another question: why don't they want to do it?"

According to AA, foreign workers are a resource because they are certainly more available and committed to work than Italians: "There is definitely a greater propensity for sacrifice than among Italians… because in practice they are more available; Italians don't want to do certain jobs. And why don't they want to do them anymore? Because universities encourage you to get a degree, and so a young graduate says: why should I be a welder when I have a degree? There's also this: quite rightly, they say I studied hard, I did a lot to improve my social position, and then I end up…." AA confirms that firms are finding it increasingly difficult to recruit Italians for certain types of work and, in some cases, prefer migrant workers who are more in need of employment and therefore more committed.

In general, all our interviewees stated the absolute need – among firms belonging to their respective trade associations – for foreign labour, and all reiterated the need, where appropriate, for **qualified** labour as well. According to AB, however, the issue is not merely to satisfy firms' demand for "pairs of hands". This risks amounting to very little unless serious integration pathways are activated for these people **already at the recruitment stage**. A need that AB strongly emphasises is to find ways to surface the skills these people often already possess when they arrive in our country but which no one identifies – and therefore no one uses. In this sense, at several points in his remarks he reiterates that identifying skills is crucial, because firms often lack the ability to read what a worker actually knows how to do: "We must pay closer attention to what these people used to do in their country." He also recounts: "I discovered, for example, at Casa Sankara – the place where I find it easiest to talk with them [migrant workers, editor's note] – something that stuck with me: I asked a young man what he did in his country and discovered that he was basically the agent of a famous local singer, whereas here he was picking tomatoes. So the point is: why not ask first? I found out, for example, that some people had been fishermen in their country of origin, and I sent them to Manfredonia; they now work on fishing boats, and the fishing sector needs many people. Fishing is one of those sectors we are abandoning – we are shutting it down, especially small-scale fishing – because people are lacking. That could be a great opportunity for people who know the sea or are even experienced in fishing – so why not use them? The truth is that no one asks them, and the only alternative they have is agriculture, because people think anyone can work there. It's not so." He concludes: "One of the pathways we should undertake is to understand exactly whether there are work experiences in these people's backgrounds and, if there are skills, to value and use them."

AB also offers an additional and important point of reflection on recruitment, in particular in relation to the *decreti flussi* (entry-quota decrees) and the cumbersome procedures laid down by the Ministry and implemented by the prefectures. AB recounts: "One day a large firm from the Foggia area came to me – they typically hire about a hundred of these workers – and they also told me they have apartments available for the workers. They had requested a certain number of workers through the Prefecture, sending a nominal list, and the Prefecture had authorised them to work there. At a certain point, however, the Prefecture of Foggia – for reasons unknown to me – cut the available numbers by almost 80%, and now they have problems because they cannot get the number of people they indicated."

According to AD, one of the main problems is that recruitment is "still very mass-based and not very selective". In his view, firms should plan more carefully for future needs so as to filter upstream and organise recruitment year by year, ideally retaining the same workforce. “A firm should say, for example: I expect that next year I will need ten pruners (who are hard to find today), and I think someone could filter upstream the year before for the following year, at least on a more or less forecasting basis, and in that time have the opportunity to channel flows, channel people, even train them in advance.”

“So when they arrive [foreign workers, editor’s note], you channel them, and you know you’re selecting among tractor drivers, among people who have skills – because you also get people with competences in electronics, in IT; you get all sorts. It would be good if you didn’t have to discover skills along the way but beforehand, because perhaps you could put that person to manage a GPS on a tractor much better than someone else – and instead you keep them on harvesting.”

Thus, according to AD, not only is there no moment devoted to skills identification, but there is also a lack of planning and forecasting which – especially in agriculture – would even make it possible to **train people in advance**: “In my view that could be a major effort: the firm says, next year I will definitely need profiles with these characteristics. Let’s start creating and training perhaps 1,000 people; we train them beforehand or we already select them with certain skills, with certain study pathways – because nowadays people study more or less everywhere. Instead, today you fish in the mass, and everything becomes complicated.”

Moreover, AD reiterates – like all the other interviewees – that **language** is a major barrier, and that workers should receive literacy training and **safety** training.

AC describes recruitment in craft firms as “an unstructured moment”; for this reason, he tells us, his organisation has launched a survey among its entrepreneurs to better understand which professional profiles they need: “I can tell you that in the crafts sector today firms need everything: pastry shops can no longer find staff capable of baking and of decorating a cake; tailors and small textile businesses cannot find people who know how to use a loom; companies in the mechanics cluster in Molfetta have exactly the same problems. Clearly, at present immigration policy and its management are heavily conditioned by the approach taken – especially by this Government and the previous one – and it does not respond to these needs.”

Adding to this is the specificity of craft enterprises: “The artisan, by definition, relies on a recruitment process that is almost familial. As a first choice, when the company starts to structure itself a little, it draws on its closest relationships. When the company grows (ten employees or thereabouts), other hiring channels naturally begin to be considered, and not infrequently I must say that auto-repair firms tend to include people from North Africa, because they are used to physical effort – work in body shops, in particular, is physically demanding. But the feedback we get from entrepreneurs in that sector is that these are above all reliable people with a strong work ethic.” Here the theme of migrants’ willingness to work – confirmed by all the other interviewees – returns forcefully.

AC also explains that the basic craft enterprise is a family-type business, “so it is not uncommon to hear the owner address employees as ‘collaborators’.”

On training: “In our firms,” he says, “there is a more or less marked tendency to allow workers to grow in terms of skills. On average, they are accompanied in raising their qualifications – not because there is a structured pathway behind it, but because the craftsperson needs the employee to be able to do as many things as possible, as well as possible. Since this is work with a strong human component, improving skills – especially on the job – is essential."

The language issue emerges once again, in AC's words, as one of the main obstacles to the integration of foreign workers, since it represents "the very first element that hinders the creation of relationships." In some cases, he notes, firms resort to informal solutions, such as directly hiring private teachers, while trade associations intervene only upon request, activating courses funded by inter-professional bodies – such as the Artisans' Fund – for Italian or other languages. However, this is an unstructured system that responds to specific needs without an organic training plan dedicated to foreigners.

Recruitment follows similar logics: it often occurs through local networks or ad-hoc initiatives, as in the case of some auto-repair companies which, before the pandemic, hosted groups of non-EU workers for training activities – initiatives that had positive outcomes but were not replicated on a large scale: "Recruitment for this type of worker is very informal, in the sense that candidates may be found within the community network in which the company operates. In some cases there were actual groups of people – especially before COVID – and especially in auto repair. If memory serves, I recall a company – whether in Canosa or Barletta – that hosted a group of non-EU workers to carry out training as part of a structured project. Some of them stayed on, and I remember one young man in particular. They told us he was the best spray painter they had ever had, to name one example. But the system is hardly ever structured."

In recent years, moreover, some local associations – particularly in Bari and Lecce – have begun to handle the procedures related to the *decreto flussi* (entry-quota decree), offering a useful service to firms, although still focused mainly on the domestic and care sectors rather than on the craft sector.

4.7 Occupational Safety and Foreign Workers

Occupational safety is one of the most sensitive areas in the relationship between migration and the labour market in Italy. Numerous studies and institutional reports have shown that foreign workers are exposed to a higher risk of accidents, occupational diseases and precarious working conditions than their Italian colleagues.

There are multiple causes of this vulnerability. First, foreign workers are often employed in the sectors with the highest incidence of risk, such as agriculture, construction, logistics and certain manufacturing branches. These activities are characterised by manual tasks, intense physical workloads, extended shifts and, in some cases, scant application of prevention rules. It is therefore no surprise that, according to INAIL data, the percentage of accidents among migrant workers is significantly higher than the national average.

Among the interviewees, AB addresses this very sensitive issue: "In my view, in these jobs we need to provide training especially on occupational safety, because one of the things that is never done when dealing with these people is to deliver safety-at-work pathways." He then adds: "The medical check-up that is normally done is not enough; it is a sort of fig leaf, but for me it is not sufficient. In my opinion, there should be at least a minimum training process on workplace safety. It is not right – in all honesty I have seen unacceptable things: people doing road-maintenance work without the slightest protective measures. It is not right, because then the notorious accident happens and the day after the problems come to light. I believe that when these people arrive at any workplace – agricultural, construction, maintenance, or any type of job – they should do those few basic hours on occupational safety."

According to AC, moreover, "in safety matters intelligibility certainly has an impact, because from a linguistic standpoint, clearly EU citizens and Italians are more aware of procedures and, often – quite simply – an incident can be caused by this kind of problem. There is undoubtedly also a concentration of foreign workers in the lowest tiers, performing jobs that tend to be more dangerous, and perhaps a greater tendency to underestimate danger because they may come from contexts where regulation is not as advanced as in Italy – we have safety rules that are even overly advanced – and so an operator who comes from countries where that kind of regulation does not exist is used to climbing a ladder in a certain way and continues to do so exactly as in the country of origin. So it's a complex problem; much more needs to be done in that regard." Finally, the interviewee points out that Italian safety legislation, such as Decree 81, was designed mainly for large firms and only derogatively adapted to small ones. This creates complexity and implementation difficulties, especially in micro-enterprises, where the weakest link is often the foreign worker: employed in less-skilled tasks, facing language barriers and a greater propensity to underestimate risks or to work beyond scheduled hours – factors that increase the likelihood of accidents and injuries. To address the problem, he argues, procedures should be simplified and training should be more **practical and hands-on**: "On recruitment and safety, I believe that, first of all, part of the work we do as trade associations should be to simplify things, because very often we struggle – with the Italian employer, the craftsperson, the employee – to make the regulatory complexity, the complexity of processes, the complexity of what is required of the firm understood. This complexity becomes incomprehensibility when you are dealing with a foreign worker; simplifying and using practical, concrete examples can help."

Traditional classroom courses, delivered solely to meet formal obligations, prove largely ineffective. By contrast, concrete examples and experiential activities would help foreign workers understand the rules better and reduce risks: "Increasing practical, concrete, workshop-style activities – especially in safety training – can help a great deal, particularly foreign workers, because we have too much training delivered formally, with workers sitting behind a desk." Finally, the importance of closer oversight of the **quality** of training delivered is underscored, since a wide variety of providers operate locally and are not always adequate: "Often the issue is just having obtained the stamp and the certificate, because courses are not always done properly. On this point, oversight should perhaps be a little more attentive – over this entire market."

4.8 Conclusions

From the interviews with representatives of Apulian employers' associations there emerges a nuanced picture, yet with several shared through-lines. The presence of foreign workers is unanimously regarded as an indispensable resource – today and even more so looking ahead – in the face of demographic decline, the low attractiveness of certain jobs for Italian labour, and firms' growing demand for skilled personnel.

The need for labour does not concern only seasonal, low-skilled jobs; it also extends to specialised roles in key sectors such as agriculture, construction, mechanics, logistics and services. Many interlocutors stress that the challenge is no longer merely to secure "pairs of hands", but also to value and develop “heads”: in other words, to build pathways that enable migrants to access more skilled and stable roles. In this sense, the identification of prior competences – often overlooked – and the launch of continuous training pathways are strategic steps.

Training, in fact, runs across all the testimonies collected: from language to safety, from technical skills to cultural integration, there is a strong call for more effective, targeted and practical tools. Training should not be limited to fulfilling formal obligations; it should be genuinely linked to firms’ needs and designed within a logic of matching labour demand and supply. Only then can it become a lever for emancipation and inclusion for foreign workers, reducing the risk of labour-market segmentation and confinement to the least protected tasks. More specifically, our key informants highlighted that integrating foreign workers into the Italian and Apulian labour markets hinges on three crucial and closely connected issues: recruitment methods, skills identification, and the need for training. These are fundamental steps which, however, often occur in a disorganised, partial or entirely absent manner, with consequences for both firms and workers.

Recruitment: between urgency and informality

The first obstacle concerns recruitment. In most cases – especially in seasonal sectors such as agriculture – the meeting between labour supply and demand does not take place through institutional or planned channels, but via informal networks, word of mouth or even illegal intermediaries such as gangmasters. Pressed by the urgency to meet immediate needs, companies rely on rapid but scarcely transparent mechanisms. Added to this are administrative constraints: the entry-quota decrees (*decreti flussi*) and procedures for work permits are complex and slow, ill-suited to a market that requires labour quickly and often only for short periods. In this context, migrant workers enter the production system without a genuine selection process, risking being employed in precarious roles or far from their abilities.

The failure to value competences

The second knot concerns the recognition and valorisation of skills. Many migrants bring with them significant work experiences gained in their countries of origin – as craftspeople, skilled operatives, drivers, welders – but these often remain invisible. Widely used tools to collect and certify such competences are lacking, and firms often have neither the time nor the expertise to recognise them.

Linguistic and cultural barriers further compound the problem: a job interview can become an insurmountable obstacle if there is no mediation, and thus a skilled worker ends up being classified as generic labour. This results in a waste of human capital that penalises both the worker – confined to low-skilled tasks – and the firm, which fails to make full use of valuable resources.

Training as a key to integration and protection

The third aspect – closely tied to the first two – is training. When offered, it is often generic, poorly targeted and hard to reconcile with the needs of workers and firms. Not infrequently, these are overly theoretical courses focused on content of little practical use, or pathways disconnected from the real needs of the area. What is needed instead are short, modular pathways capable of providing immediately useful tools: Italian-language courses applied to the workplace, practical safety training, and technical on-the-job instruction. If designed in collaboration with firms, training could become a concrete bridge to employment, reducing the gap between “knowing” and “doing”.

A further, fundamental knot concerns occupational safety. Here migrants' vulnerability appears amplified: due to concentration in high-risk sectors, linguistic and cultural barriers, and regulatory complexity that weighs especially on micro and small enterprises. Interviewees suggest simplifying procedures and focusing on more practical, experiential training, accompanied by closer oversight of course quality.

Consequences and prospects

The absence of a structured system for recruitment, assessment and training produces clear negative effects: chaotic hirings, high turnover, integration difficulties, and increased risk of accidents and exploitation. Conversely, where coordinated pathways are trialled – starting from mapping company needs, moving through assessment of workers' competences, and culminating in targeted training – the results are tangible: more stable placements, greater employer satisfaction, real skills growth, and safer workplaces.

In conclusion, the chapter portrays a production fabric that recognises the contribution of foreign workers as indispensable, yet struggles to organise itself in a structured way to recruit, value and train this workforce. The testimonies clearly point the way: planning for skills needs, identifying competences, continuous training, and building a stronger system of reception and social protection. Only an integrated, forward-looking approach will make it possible to set these as priorities and to build a new model of integration – one that meets firms' needs while ensuring better rights and life prospects for migrant workers.

Chapter 5

Focus group with migrant reception associations

5.1 Introduction to the chapter

The focus group reported in this chapter brought together practitioners and representatives from various associations active in migrant reception and integration in Apulia. Participants included representatives from Caps, Etnie, Associazione Don Bosco, Arci Puglia, and ActionAid. The meeting aimed to reconstruct pathways, experiences and critical issues encountered in day-to-day work with foreign nationals, with particular attention to relationships with the labour market. The analysis yields a complex picture, with light and shade: on the one hand, the richness of associative experience and a capacity for innovation; on the other, the structural limits of the Italian reception system, which remains overly emergency-driven and assistance-based.

5.2 Origins and Evolution of the Role of Associations

Many contributors recalled that some reception associations in Apulia were founded in the late 1990s. The association **Etnie**, for example, was set up in Bisceglie with intercultural aims: festivals, exchanges, ethnic cuisine, and meeting spaces. Later, with the approval of the **Bossi – Fini law** and the growing difficulties of regularisation, the association gradually took on a practical support function as well: information desks, advice on residence permits, and mediation between migrants and employers.

One interesting point that emerges from our interlocutors' accounts is that it was often not only migrants who turned to the associations, but also local employers eager to regularise their foreign employees, considered indispensable for specific skills (dry-stone walling, home care, etc.). As one practitioner put it: "It is employers who come to us with people. No one knows how they met, how this 'love' was born – professionally speaking – but they practically kneel and say: tell me how I can regularise this person, because I need this worker like I need bread. So the 'users' were no longer so much the foreign citizens as their employers."

And again: "This has always happened. Whether with Albanians or with the first Georgians – women from Eastern Europe employed in domestic work – who helped these people with intermediation, to find job opportunities? Their employers were very keen to keep them within the law or to help them emerge, because very often they did not have residence permits, so their employment was always off the books."

5.3 Critical issues in the reception system: assistance-based approaches and dependency

One of the most debated issues in the focus group concerns how the reception system functions. Practitioners acknowledged the merits of a framework that guarantees protection, food and housing, but they also strongly emphasised its contradictions, describing a model that all too often risks trapping migrants in a condition of dependency rather than accompanying them towards autonomy. One practitioner explained: "Guiding them towards autonomy used to be our mission; now the pathways become endless and a dependency takes root that immobilises people."

Another added: “There’s too much over-protectiveness; we risk building a bubble that doesn’t correspond to reality. When they leave, the encounter with real life becomes traumatic.”

The idea of “over-assistance” was mentioned repeatedly, pointing to a system that overshoots on formal protection but fails to provide concrete tools for independent living. “We protect them too much, we infantilise them, and when the time comes to fend for themselves many are not ready,” commented one practitioner. A colleague went further: “We create unreal pathways that accustom them to a cocooned environment. It’s as if we were training them to live in a world that doesn’t exist.” Many highlighted that projects often do not respond to people’s actual needs. “They’re drawn up on paper, with little attention to the local context and to real employment opportunities,” observed one participant. Another recalled: “We have had young people ready to work, with companies willing to take them on, yet they spent months in centres doing activities unconnected to their real lives.” Fragmentation and a lack of coordination among facilities were seen as further limitations: “Each centre goes its own way. In Bari they do things one way, in Lecce another, in Foggia different again. It’s a lottery: your opportunities depend on where you arrive.”

Bureaucracy was cited as one of the main obstacles. Many practitioners said they spend much of their time filling out paperwork, to the detriment of educational and training relationships. “We spend more time on forms than with people,” said one practitioner. Another added: “Every extra form means one day less devoted to individual pathways.” Some also denounced the absence of a stable national strategy, replaced by emergency and piecemeal interventions: “Migration is always treated as an emergency. There is never planning – only stopgaps.” This approach, they argued, prevents the construction of a long-term vision and leaves associations managing day-to-day realities in precarious conditions.

A further critical aspect concerns the gap between the pathways set out in projects and the real conditions migrants encounter once they leave. “Within the system they have food, housing, courses, mediation. Outside they find precariousness, unaffordable rents, bureaucracy and exploitation. The transition is too abrupt,” explained one participant.

Finally, it was noted that excessive protection risks having counterproductive psychological effects: “We accustom them to a context where there is always someone who solves problems for them. But in real life they have to face responsibilities, failures, challenges. If we don’t prepare them, we risk exposing them to fresh frustrations and marginalisation.”

According to one practitioner, it almost seems that the migrant – along with their individuality and specificities – disappears in the face of an overly rigid reception system: “Everything is conceived as if the person arriving from a context completely different from ours were empty – a space to be filled. If they don’t get on well with their employer, it’s because we haven’t explained it to them; if they don’t clean the bathroom in the house where we’re doing a check, it’s because we haven’t explained it well enough. There is never any respect for the person’s self-determination.”

In short, the criticisms raised do not deny the importance of reception; rather, they highlight its structural limits: a system that guarantees basic protection but struggles to become a genuine pathway to emancipation and empowerment. As one practitioner summed it up: “It’s not enough to provide a roof and three meals a day. We have to provide tools, responsibilities and prospects. Otherwise, reception remains a dead end.” And finally: “No one ever really evaluates us through an educational lens, because education also involves setting limits.”

5.4 The transition of unaccompanied minors

The issue of unaccompanied minors emerged as one of the most sensitive topics in the focus group. Associations noted that, in the past, reception pathways were shorter and geared towards rapid entry into work and society. With regulatory changes and longer stays, young people now risk living in a state of suspension that leaves them less prepared to face adult life.

The transition to adulthood was described as one of the most delicate moments. In the past, once they turned 18, youths were immediately accompanied to the job centre and started on traineeships. Today, however, bureaucratic short circuits block pathways – for example, the impossibility of accessing traineeships without having fulfilled compulsory schooling. This pushes many young people towards undeclared work or exploitation.

One practitioner stressed: "There is too much over-protectiveness: we create a reality that isn't the real one, so the young person lives in a bubble that then bursts abruptly." Another added: "They reach 21 without ever having truly experienced work, and then they suddenly find themselves alone."

The associations also highlighted difficulties linked to training: minors are often placed in standardised courses that do not take account of their prior skills or interests. This generates frustration and drop-out. "Many of these young people have already worked in their countries of origin, but here they are treated as if they had to start from scratch," explained one practitioner. The lack of rapid tools to recognise competences therefore makes matters worse. In Apulia there is no structured system, whereas other regions (e.g. Tuscany) have committees that validate informal work experience, the practitioners recalled.

Another critical issue concerns the transition to adulthood itself. Bureaucratic procedures do not always accompany young people gradually: "They find themselves moving from a protected system to sudden freedom, without a real bridge to help them." In this regard, some practitioners proposed creating personalised bridging pathways that would allow newly-of-age youths to experience the world of work gradually, through traineeships and mentoring.

Finally, the risk of social marginalisation was underlined for those who, after leaving reception pathways, fail to gain a stable foothold. "If we don't support them in the exit phase, we risk losing all the work done up to that point," observed one participant.

5.5 Migrant Women and Specific Vulnerabilities

Migrant women are among the most fragile and vulnerable groups within the reception system and the labour market. In addition to the difficulties common to other foreign workers, they face added barriers linked to gender, motherhood, and the absence of family or social support networks. Many practitioners stressed that literacy levels are often very low, which translates into a double disadvantage: "For some women it is difficult even to read a bus sign – let alone deal with an employment contract or a bureaucratic procedure."

Childcare is a structural obstacle. In the absence of babysitting services or other support, many women are excluded from language courses and training pathways. Some associations have piloted language classes where mothers can bring their children, thanks to volunteers. Nevertheless, barriers remain: a lack of nursery places, exclusion from CPIA adult education centres, and the spread of unlicensed daycare. "Some cannot attend Italian courses because they have no one to look after their children, and so they are excluded from any opportunity," explained one practitioner. Another added: "For us, training must always go hand in hand with support for motherhood; otherwise half of the women are left out." Another critical aspect concerns access to work. Migrant women mainly find employment in domestic and care work, often in irregular conditions. "Many end up in undeclared work, without protections and with no prospects for advancement. It is as if they were confined to an invisible role," one participant emphasised.

Difficulties are even more pronounced in peripheral areas and small towns, where welfare provision is virtually absent: "If you move even slightly away from the main centres, you won't find the kind of welfare that exists in Bari. So we try, through local networks, to respond to these women's needs." This lack of local services increases dependence on voluntary associations and informal networks, but does not offer stable prospects for autonomy.

Some practitioners insisted on the need for women's empowerment pathways that go beyond mere assistance: "It is not enough to offer a roof or a course; we must provide concrete tools so they can become autonomous – economically and socially." Another voice added: "Women are the most resilient, but if we don't invest in them, they will always remain the most penalised."

5.6 Relations with the labour market

The relationship with the labour market was one of the most central and complex issues addressed in the focus group. Associations described how, in recent years, the way firms relate to migrants has changed radically: from an initial view of "emergency" and "help" to a widespread awareness that, without foreign workers, entire sectors of the economy would struggle to function.

One practitioner, as noted at the beginning of the chapter, recounted a telling episode: "It is employers who arrive with people… they practically kneel down and say: tell me how I can regularise this person, because I need this worker like I need bread." This statement – recalled forcefully at several points – shows how today it is entrepreneurs themselves who push for regularisation, aware of the need for reliable, stable labour.

Informal and ad hoc channels

Despite growing demand, the ways in which firms and migrants meet remain largely informal. "There is no organised system linking reception pathways and companies," observed one practitioner. "It often works only thanks to personal networks, volunteers, and community contacts. But this means access to work depends on chance, not on a structured framework." This informality has mixed consequences: on the one hand it allows quick solutions; on the other it exposes workers to greater precariousness and increases the risk of exploitation.

Bureaucracy as an obstacle

Testimonies highlighted how the complexity of procedures and regulatory rigidities discourage many firms. "Companies would like to hire, but they don't know where to start: permits, contracts, the *decreto flussi* (entry-quota decree)… without our help they often give up." In this sense, associations play a crucial mediating role: "We are the ones who explain the rules, handle the paperwork, and act as a bridge between companies' needs and workers' rights." But unless this role is recognised and supported, the burden risks falling entirely on the third sector.

Training and skills

Many practitioners stressed the mismatch between the training pathways offered within reception projects and the concrete needs of the labour market. “Too much theory, too many courses that only serve to get a stamp. In the end, the young people are ‘trained’ on paper but don’t find work.” Another participant added: “Courses need to be built together with firms, tailored to the sectors that truly need labour. Otherwise we risk training profiles no one is looking for.” The shared view is that training must become a real bridge to employment, not a bureaucratic checkbox.

Risk of exploitation

The lack of a structured system makes it easier to resort to irregular or underpaid work. “When companies can’t find simple, clear pathways, they end up turning to parallel channels – and the line between that and exploitation is very thin,” one practitioner stated. Another voice added: “If we don’t build regular, transparent pathways, gangmastering and irregularity will continue to find space.”

Long-term vision

The discussion closed with a critique of the emergency logic that still characterises policies on migrant labour. “We cannot keep managing everything as an emergency. Migrants will always be here; firms will always need them. We need stable planning, not improvisation.” One participant summed it up clearly: “Migrants want to work and firms need them. What’s missing is a solid bridge. Until we build it, we’ll remain at the mercy of occasional, unfair solutions.”

5.7 Local networks as laboratories of social innovation

During the focus group, it clearly emerged that building territorial networks and promoting concrete projects are the real strengths of associations engaged in reception. Practitioners stressed that, beyond broad regulatory frameworks, it is often bottom-up initiative that makes the difference. “We can’t always count on a stable national system, but at the local level we do manage to set up networks that work,” said one practitioner. Many successful experiences arise from encounters between associations, training bodies and companies willing to pilot innovative pathways. “I remember a training project in auto repair: a group of young people entered the company, some continued, and one of them stayed on and became a point of reference. Real results are born from these collaborations,” a participant recounted.

The ability to forge territorial alliances is seen as an essential tool for overcoming the limits of the reception system. “If you move even slightly away from the larger centres, you won’t find welfare. So we rely on local networks to meet needs, especially those of women and families,” one practitioner emphasised. This shows how connections with associations, parishes, third-sector organisations and informal groups become crucial to ensuring widespread, ongoing support.

Practitioners also highlighted the growing role of employers’ associations, which are organising themselves to manage procedures and pathways linked to migration flows.

There was no shortage of criticism of the lack of national coordination to valorise and systematise these good practices. “The problem is that each network operates on its own: there are outstanding experiences in Bari, Lecce and Foggia, but there is no common thread linking them,” one practitioner noted. Despite this limitation, the wealth of local project work was seen as a valuable asset: “The strength of reception in Apulia lies precisely in informal networks, in the ability to devise solutions even with limited resources.”

Overall, the theme of networks and projects shows that the difference is made not only by financial resources or rules, but above all by the capacity of local actors to cooperate. As one participant summed it up: "Where strong networks are created, migrants are not left alone and find concrete opportunities. Where networks are absent, the risk is that everything is reduced to assistance-based warehousing."

5.8 Successful experiences and good practices

Alongside the critical issues, focus group participants paid close attention to several successful experiences regarded as benchmarks and replicable models for improving the reception and inclusion system. The discussion highlighted how, where collaboration between public bodies, associations and businesses is achieved, results are concrete and often remarkable. Practitioners stressed that, very often – beyond regulations – it is bottom-up initiative that makes the difference. "We cannot always count on a stable national system, but at the local level we manage to build networks that work," said one practitioner.

The "Welcome Network," promoted by UNHCR, was described as a particularly positive example. It is a network composed of dozens of civil-society organisations that manage reception projects, together with public and private employment services. The network grew out of UNHCR's "Welcome" project to support companies in building corporate partnerships aimed at the labour inclusion of refugees. The goal is to enhance the effectiveness of inclusion measures by expanding access to the labour market and recognising the value of local partner organisations operating in the territories. Practitioners underscored that the project's strength lies in its ability to put companies in direct contact with migrants, creating real – not merely formal – pathways to employment. "The Welcome Network was one of the few experiences that truly allowed us to match migrants and companies, without leaving everything to improvisation," said one practitioner. Others noted that the initiative also helped overcome initial scepticism among employers: "Many employers changed their minds: they saw that migrants were reliable and competent, and asked to continue the collaboration."

Another successful example was that of *one-stop desks* set up in various municipalities, which simplified access to services and reduced bureaucratic fragmentation. "Having a single desk was a step forward: people no longer have to run from one office to another; they find a clear point of reference," explained one practitioner. The simplification was perceived not only as an aid to migrants but also as a relief for the associations themselves, which often have to fill institutional coordination gaps. "The one-stop desks have enabled us to work better as a network, because they give us a clear counterpart," added another participant.

The "Sweet Project" (*Progetto Sweet*) was cited as one of the most significant initiatives to combat the exploitation of women in agriculture. According to participants, its innovative feature was combining the fight against undeclared work with women's empowerment pathways. "With Sweet we managed to bring many women out of undeclared work who were living in situations of silent exploitation," said one practitioner. Another added: "It was important because it combined training, rights and accompaniment into regular employment: not just denouncing exploitation, but building concrete alternatives."

Considerable space was devoted to local experiments seen as true laboratories of social innovation. Among these, *community matching* pathways were recalled, which fostered encounters between local families and migrants for shared experiences and mutual support. “Community matching was crucial in breaking the isolation of young people. They not only found a place to stay but also relationships that helped them feel part of a community.”

Another virtuous example concerns cooperatives created from the ground up, where migrants are no longer merely project beneficiaries but active agents and protagonists. “Cooperatives show that migrants can become entrepreneurs, not only precarious workers,” one participant underlined. Such experiences were seen as especially important because they break the assistance-based logic that often characterises the reception system.

Finally, language courses accompanied by childcare services were highlighted; these enabled many women to attend without having to forgo participation due to family responsibilities. “Italian classes with babysitting were a turning point: they gave many women the chance to attend – otherwise they would have been left out,” said one practitioner. This example also opened discussion on the gender dimension of inclusion: without specific measures, women risk remaining on the margins.

Overall, these experiences were seen as concrete examples of how reception and work can positively intersect when there is a strong network of local actors. “We don’t need top-down projects; we need real networks, built with those who know the territory and its real needs,” summed up one practitioner. Another added: “Where networks exist, migrants are not left alone and find opportunities. Where they don’t, reception risks becoming mere warehousing.”

5.9 Conclusions and policy outlook

The focus group highlighted the complexity of the migrant reception and inclusion system in Apulia, showing how associations have become central actors not only in day-to-day management but also in the piloting of new practices. What clearly emerges is that reception is no longer a marginal or emergency field, but an area that intersects welfare, the labour market, education policies and social cohesion.

Associations stressed that the most effective models are those rooted in local territories and capable of building networks: not top-down solutions, but pathways built around people’s real needs and the resources present in communities. This indicates that reception works best when it becomes a participatory process rather than the simple delivery of services.

At the same time, the need to avoid the risk of over-assistance emerged forcefully. The system must guarantee protection but also foster responsibility; provide accompaniment without substitution. It is precisely on this balance that the quality of reception is measured.

From the discussions, several policy suggestions emerged that could guide future interventions:
- **Administrative simplification**: reduce bureaucratic steps and strengthen municipal one-stop desks to ensure simpler, quicker access to services for both migrants and firms.
- **Bridging pathways for minors and newly of-age youths**: put in place tools that accompany young people in the transition to adulthood through traineeships, mentoring and gradual entry into work.
- **Empowerment of migrant women**: develop language and vocational training courses integrated with childcare services, so that women can truly participate and move beyond the marginality of irregular domestic work.
- **Skills recognition**: introduce regional systems to recognise prior – also informal – experience,

following the example of other regions, so as to avoid wasting already-acquired competences.
• **Stable links with the labour market**: build structured networks between associations, businesses and institutions to move beyond personal contacts and guarantee transparent, regular matching between labour supply and demand, envisaging dedicated, specialised services.
• **Long-term planning**: overcome the emergency approach and establish stable reception and inclusion policies that can provide continuity and valorise good practices already trialled locally.

Ultimately, this chapter presents a picture made up of contradictions but also of extraordinary resources. On the one hand, a fragmented, bureaucratic system at risk of fostering dependency; on the other, innovative experiences that show the possibility of building real pathways to autonomy and inclusion. The challenge for institutions and local actors will be to systematise good practices, recognising and valuing the fundamental role of associations. Only then will it be possible to transform reception from an emergency response into a structural policy capable of contributing to the social and economic development of Apulia and of Italy.

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