

YES Project VS/2019/0395

Country in focus paper - Italy

**Mobility of companies and workers through postings in the year of
the pandemic**

Summary report of the survey conducted on the flows towards
the States affiliated with Italy

*Monitoring the posting of workers abroad
Four-month period: 01/10/2020 - 31/01/2021*

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February 2022

As part of the EU Programme for Employment and Social Innovation (EaSI) with the Youth Employment Skill Set in Posting - YES project, the CNCE has monitored the posting of workers' flows to foreign countries affiliated with the Italian bilateral sectoral system through specific protocols and conventions (namely the Bilateral Agreements) with: Austria, France, Germany, Republic of San Marino.

In 2020, the construction sector in Europe was deeply impacted by the COVID-19 pandemic, both in absolute terms on manufacturing performance (worked hours) and in terms of employment rates. Therefore, the possibility to post workers, and more in general, the mobility of businesses and workers have been subject to limitations as well.

With regard to Italy, the data recorded by the CNCE's *National Statistic Observatory* show that manufacturing trends were in direct connection with the decisions on total or partial lockdowns in some areas of the country, as well as movements between regions and/or different countries. After a decrease in manufacturing of about a **-45.57%** of the worked hours, as registered in March 2020 compared with the previous year, the numbers collapsed to over **-82.39%** in April 2020. As of May 2020 (**-21.87%**), a progressive recovery in the building industry started, which led to the **+12.89%** value in August 2020, calculated on the worked hours in the same month of the previous year. This positive trend was demonstrated again in 2020 (**+8.54%**), then decreased back in October, in connection with the so-called "second wave" of the pandemic (**-3.88%**), only to recover in November (**+11.85%**), attesting to **+ 2.98%** in December.

The following table shows the details of the monthly data collected at national level by the CNCE on the working hours reported by the construction companies to the national system of the 114 construction workers' funds (Casse Edili).

Considering these elements, the posting of workers' data related to the 4 affiliated countries in the three-month period of *October 2020 – December 2020* have been collected and analyzed taking into account the a three-month period which is significant for its amount and in comparison with other similar recorded data both in the previous years with a pre-pandemic production level, and in the first month of 2021.

CNCE STATISTICAL OBSERVATORY

Statistical sample 114 Construction Workers' funds – Casse Edili/Edilcasse
January - December 2020/ January - December 2019

NATIONAL SUMMARY

WORKED HOURS

January 2019	January 2020	%	February 2019	February 2020	%	March 2019	March 2020	%
42.372.148	46.537.612	9,83	45.521.438	48.439.300	6,41	50.250.864	27.349.097	-45,57
April 2019	April 2020	%	May 2019	May 2020	%	June 2019	June 2020	%
46.471.789	8.181.976	-82,39	52.934.626	41.355.285	-21,87	50.831.531	50.669.518	-0,32
July 2019	July 2020	%	August 2019	August 2020	%	September 2019	September 2020	%
57.746.185	59.155.855	2,44	31.936.593	36.052.416	12,89	50.541.764	54.857.204	8,54
October 2019	October 2020	%	November 2019	November 2020	%	December 2019	December 2020	%
57.946.409	55.699.791	-3,88	47.542.818	53.178.558	11,85	40.721.981	41.936.781	2,98
JANUARY 19 DECEMBER 19 TOTAL	JANUARY 20 DECEMBER 20 TOTAL	%						
574.818.146	523.413.391	-8,94						

The sample collected and analyzed for the YES project in the fourth quarter of 2020 and in January 2021 is substantial: 158 declarations, reported to the territorial construction workers' funds (Casse Edili), from the companies posting abroad, for a total of 86 companies and 638 posted workers.

The following tables show a summary of the general data in line with the posting period, which, in most cases, covers a period longer than the quarter examined, starting from July 2020 to the spring of 2021, in most cases.

Concerning the structure of the companies dealing with posting of workers, as reported in detail in the 158 cases examined in the analytical summary of the Annex 1, some are important and large entities, operating at national and international level in the field of infrastructural technologies and engineering (such as ICOP in Udine, Dolomite in Belluno, Rodio in Forlì/Cesena). Some of the companies are also specialized in providing the host countries with manufactured goods, technologies, and with laying and installation operations: this is the case of the works connected to the installation of furnaces and resin floors and to the supply and assembly of wooden constructions.

The rest of the companies reflect the Italian productive fabric - SMEs and craftsmen capable of offering manpower and specialized works such as the installation of floors, plasterboards, insulations, coatings, waterproofing and overcoat systems, and the carrying-out of high-quality renovation works of shops and boutiques. In this context, there are several craft businesses owned by foreign entrepreneurs in Italy which provide services overseas as well.

Regarding the posted workers, 60.8% of them are Italian while 39.2% are foreigners, including EU workers (for the most part of Romanian and Bulgarian nationalities), and non-EU workers (from Egypt, Tunisia, Morocco, etc.).

If we consider the age group of the posted workers, **140, or 22% of them, are between 18 and 30 years old** (the age required for a possible apprenticeship contract in Italy), **55% of them are between 31 and 50 years old, while the rest - 23% - are over 51 years old.** A more in-depth analysis allows us to find out that a team of workers sent abroad is often composed of, at least, one very experienced worker, who is assisted by other younger workers, some of whom are under 30 years old.

From the gender point of view, however, the absolute predominance of posted male construction workers is confirmed.

POSTINGS FROM ITALY: type of workers employed and type of posting period								
FOUR-MONTH PERIOD 01/10/2020 - 31/01/2021	no. of CASES	no. of BUSINESSES	no. of WORKERS	Length of posting				
				< 1 month	1 -3 months	3 -6 months	6-12 months	>12 months
	158	86	638	196	268	67	55	52
%	100	100	100	30,7	42,0	10,5	8,6	8,2

POSTINGS FROM ITALY: type of workers employed and type of posting period										
no. of WORKERS	nationality		age of the posted workers					m	f	FOUR-MONTH PERIOD 01/10/2020 - 31/01/2021
	IT	foreigners	18 - 30	31 - 40	41 - 50	51 -60	> 60			
638	388	250	140	152	199	120	27	635	3	No.
100	60,8	39,2	22,0	23,8	31,2	18,8	4,2	99,6	0,4	%

POSTINGS FROM ITALY FOUR-MONTH PERIOD 01/10/2020 -31/01/2021		
no. of cases by host country		
	no	%
AUSTRIA	19	12,0
FRANCE	61	38,6
GERMANY	76	48,1
REP. OF SAN MARINO	2	1,3
TOTAL	158	100

Moving back to the 158 cases examined, as shown in the table, 48.1% of the postings is to Germany, 38.6% to France, 12.0% to Austria and there are only two cases of postings to the Republic of San Marino (this evidence is linked to the effects of the lockdown due to the pandemic).

If we look at the territorial competent construction workers' funds (Casse Edili) of the companies, only **20 of the construction workers' funds** out of 114 were interested by the manpower declared

over the course of the considered period. A little less than one third of the declarations can be traced back to the Construction workers' fund (Casse Edile) of the Bolzano province, with mobility flows towards Germany and Austria, which are neighboring states with a common language.

More than one third of the cases, 59, can be attributed to the construction workers' funds (Casse Edili) of the Veneto region, with mobility flows to the bordering countries (Austria and Germany, for the most part). However, there are significant direct flows to France in case of specialized works, and supply of equipment and machineries.

One fifth of the cases can be traced back to the regions of Lombardy and Piedmont, with mobility flows to France, for the most part.

The region of FVG is one of a kind. There the mobility flows reported from the Construction workers' fund of Udine are related to a large specialized company operating in different European contexts on major infrastructure works.

The rest of the requests are referred to single companies registered to construction workers' funds in other regions, which have probably found opportunities and contracts abroad. This information is likely to change and, over the full year, may involve other construction workers' funds (Casse Edili), not included in this survey.

POSTINGS FROM ITALY FOUR-MONTH PERIOD 01/10/2020 -31/01/2021

CONSTR.WORKERS' FUND/EDILCASSA	REGION	no. of cases
BELLUNO	VENETO	3
BOLZANO	P.A. BOLZANO	49
BERGAMO	LOMBARDY	1
BRESCIA	LOMBARDY	16
LECCO	LOMBARDY	1
CEDAIER	EMILIA ROMAGNA	2
CEDAM	MARCHE	1
CEIV	VENETO	41
CERT	TUSCANY	1
EDILCASSA APULIA	APULIA	1
EDILCASSA VENETO	VENETO	9
FCR	EMILIA ROMAGNA	2
MILAN	LOMBARDY	9
PERUGIA	UMBRIA	1
TARANTO	APULIA	1
TERAMO	ABRUZZO	1
TURIN	PIEDMONT	5
UDINE	FRIULI VENEZIA GIULIA	8
VENICE	VENETO	4

VICENZA	VENETO	2
Total		158

POSTINGS FROM ITALY FOUR-MONTH PERIOD 01/10/2020 -31/01/2021

REGION	n. of cases
VENETO	59
P.A. BOLZANO	49
LOMBARDY	25
FRIULI VENEZIA GIULIA	8
PIEDMONT	5
EMILIA ROMAGNA	4
APULIA	2
ABRUZZO	1
MARCHE	1
TUSCANY	1
UMBRIA	1
Total	158

The detailed analysis provided by CNCE allows to monitor each of the 158 cases examined through an analytical reading of the single posting declaration: name of the business, number and profile of the posted workers, average duration of the posting, location and host country, and type of works to be performed.

It should be noted that a cross-examination of the locations allows to identify how multiple companies with their own specializations, different yet connected (for example, wooden constructions, roofing and sheet metal works or insulations and waterproofing), can sometimes intervene in a coordinated manner and one after the other, on the same construction site abroad.

This information brings the attention back to the types of works to be performed, which represent the peculiarities of the Italian companies operating abroad.

The last table below presents a reclassification of the types of works and operations by professional macro-areas, to highlight the main activities that companies and workers coming from Italy perform abroad (still with reference to the four-month period under investigation). This has had an impact on the choice of professional figures to be further analyzed over the course of YES project.

Annex 1: Monitoring the posting of workers abroad



TYPE OF WORKS REPORTED BY THE COMPANIES (01/10/2020 - 31/1/2021)	CASES	WORKERS
GENERAL WORKS:	101	370
GENERAL CONSTRUCTION/CONSTRUCTION WORK	15	64
INSTALLATION OF FLOORS & COATINGS (CERAMIC, STONEWARE, MARBLE)	19	50
ASSEMBLY/CONSTRUCTION OF WOODEN HOUSES	17	57
PLUMBING WORKS	2	4
CARPENTRY AND CONCR, REINF. CONCR. WORKS, CONCRETE SCREEDS	7	34
ERECTION AND DISMANTLING OF SCAFFOLDING	5	22
INDOOR PLASTERBOARD WORKS	6	37
WATERPROOFING, INSULATION, OVERCOAT	7	15
RENOVATION OF SHOPS AND LUXURY REAL ESTATE PROPERTIES	10	35
EXCAVATION WORK	3	3
SPECIAL RESIN FLOORING	6	34
ROOFING AND SHEET METAL WORKS	4	15
SPECIALIZED WORKS:	46	225
POLES, PERFORATIONS, MICROTUNNELLING AND SPECIALIZED WORKS CONNECTED (BUFFERS IN JET GROUTING AND INJECTIONS FOR THE EXIT OR ENTERING OF TBMs)	11	127
CONSTRUCTION OF SPECIALIZED WORKS (CONSTRUCTION OF INDOOR KART TRACKS, WATERPROOFING OF DAMS, ENVIRONMENTAL CHAMBER, ETC.)	6	23
ERECTION AND DISMANTLING OF CRANES	1	1
SPECIAL ENDOSCOPY WORKS AND FURNACE SOLDERING	27	69
ARCHITECTURAL RESTORATION	1	5
LABOUR PROVISION	11	43
FOUR-MONTH PERIOD TOTAL 01/10/2020 - 31/01/2021	158	638



This paper was produced for the YES project, which received funding under the Call for proposals VP/2019/008 of the DG Employment, Social Affairs and Inclusion of the European Commission. The opinions hereby expressed reflect only the authors' view. The European Commission is not responsible for any use that can be made of the information contained therein.



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