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Posting of workers during
the COVID-19 pandemic,
current challenges,
and future prospects



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SCENARIOS REPORT

ON POSTING OF WORKERS IN EUROPE



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1. Introduction

This report on the possible scenarios of posting workers in Europe is based on the national reports issued for the project “Posting prospects”.

The Portuguese report on literature review, remembered that “one of the main challenges to ensuring the effectiveness of compliance with the legislation applicable to the posting of workers is the identification of a given concrete situation as being of posting” (p. 12). This means that there are still important issues related to the definition of the concept of “posting work”. Several national reports for the present project mentioned this issue.

The calculations provided for the four scenarios are not based on quantitative calculations but on assumptions of qualitative trends that we could acknowledge from the national reports and literature. They are just indicative and based on provided hypotheses defined for the scenarios.

2. Trends of posting workers in Europe

In 2015 there were 2.05 million posted workers in the EU, according to the (European Commission, 2022). This number of posted workers has increased by 41.3% between 2010 and 2015. It is possible that the figures are even bigger, but the Covid19 changed severely the conditions for these working contracts. The percentage of posted workers in the workforce remains low, in 2015 (on average 0.9% of total employment in the EU, 0.4% in full-time equivalents).

Unfortunately, there are no more recent statistics about the fluxes of posted workers in the countries under analysis.

The concentration of posted workers in some sectors is however high. Around 36% of total postings are concentrated in the construction sector. The concentration is especially high in Luxembourg, Belgium, and Austria, from a receiving perspective, and in Luxembourg, Slovenia, Slovakia, Croatia, Portugal, and Poland from a sending perspective. In fact, the report published by De Wispelaere, De Smedt and Pacolet (2022) concludes that “subcontracting is especially common in price-sensitive and labour-intensive sectors, such as construction, shipbuilding, meat industry, and manufacturing” (De Wispelaere et al, 2022: 39). This aspect is very important once it includes the NACE C (manufacturing) sector and it will play a role in design of scenarios.

In this same study they authors continue saying that “the sectoral distribution indicates that the Netherlands issue most permits for the sector ‘Information and communication activities’ (70.1% of all permits in 2019; 61.4% in 2020), followed by permits in the sector ‘Professional, scientific, and technical activities’ (12.9% in 2019; 15.3% in 2020). (...) Hungary issued the majority of permits in ‘Manufacturing’ (55.0% in 2019; no data for 2020) and ‘Information and communication’ (24.6% in 2019; no data for 2020). Thus, these data show that a high number of ‘intra-corporate transfers’ take place to the Netherlands and France, mainly in ‘high skilled’ sectors such as ‘Information and communication’ and ‘Professional, scientific and technical activities’.” (De Wispelaere et al, 2022: 40). This kind of specific information was not mentioned in the national reports. Thus, it will be very difficult to develop accurate scenarios.

The Portuguese report refers that “more than half of postings take place between neighbouring countries; the percentage of postings coming from neighbouring countries can be as high as 80% in some cases in the EU. The EU average time of posted workers delivering a service in another country is less than 4 months. On average, workers tend to be posted 1.9 times per year. However, the average duration of postings from some countries can be as long as over 8 months.”

Finally, it seems that “posting often occurs between Member States bordering each other. Indeed, it is found that geographical proximity is still the most relevant factor which explains the direction and the extent of posting flows, seeing that it is associated with business and historical links” (De Wispelaere et al, 2022).

In this project it was interesting to collect more information about the use of this type of contract in non-EU countries, but European countries. The examples that were presented in several case study reports mention that the movement of posted work is mostly from those countries towards EU member states, and there are clear bureaucratic difficulties for the acceptance of those workers in the European labour market. There are restrictions related with the

The following table presents the fluxes of posted workers by origin and destiny in 2019, based on the PDs A2 issued by member states according to the Article 12 of the Basic Regulation.

Table 5 PDs A1 issued by competent Member States according to Article 12 of the Basic Regulation, breakdown by receiving Member State, 2019

		Sending Member State																											Total					
		BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE		UK	IS	LI	NO	CH
Receiving Member State	EU-27	81,868	14,147	10,177	6,540	1,393,574	6,509	2,819	6,334	120,699	102,337	44,846	127,203	78	2,513	25,906	72,961	55,644	263	20,832	83,505	237,748	57,437	44,070	93,640	89,641	4,002	2,669	38,752	166	173	26,681	2,773,734	
	EU-28	83,755	14,436	10,389	7,100	1,481,505	6,516	3,258	6,489	131,859	112,023	45,146	133,263	78	2,525	26,071	74,191	56,351	287	21,798	85,126	242,637	58,186	44,560	94,131	90,599	4,178	2,870	39,109	171	188	27,449	2,906,244	
	EU-15	81,398	13,296	8,481	6,084	1,182,417	6,347	3,110	5,746	122,175	101,014	41,898	117,822	69	2,136	24,903	72,854	52,656	277	21,181	74,402	231,130	57,361	41,741	87,924	76,363	3,929	2,685	37,259	159	188	25,429	2,502,434	
	EU-13	2,357	1,140	1,908	1,016	299,088	169	148	743	9,684	11,009	3,248	15,441	9	389	1,168	1,337	3,695	10	617	10,724	11,507	825	2,819	6,207	14,236	249	185	1,850	12	0	2,020	403,810	
	EFTA	2,115	356	255	3,120	200,205	684	125	88	4,237	10,529	1,153	39,886	<5	104	5,934	940	1,103	18	642	6,950	4,212	575	674	1,201	1,012	249	974	3,688	26	41	479	291,578	
	Total	85,870	14,792	10,644	10,220	1,681,710	7,200	3,383	6,577	136,096	122,552	46,299	173,149	81	2,629	32,005	75,131	57,454	305	22,440	98,965	246,849	58,761	45,234	95,332	91,611	4,427	3,863	42,807	197	229	1,940	27,928	3,206,680
	BE	1,856	398	122	88,115	31	235	237	6,025	18,868	1,478	6,181	<5	64	1,571	27,003	2,262	5	7,669	1,501	19,734	13,486	4,632	7,935	4,630	160	144	3,315	<5	6	562	218,230		
	BG	112	42	32	9,076	0	<5	145	300	410	32	702	0	37	<5	14	155	0	11	519	960	95	549	67	306	9	12	50	0	0	203	13,840		
	CZ	432	93		164	79,142	<5	7	20	1,220	1,828	380	2,091	<5	0	89	137	454	<5	55	1,645	3,868	90	424	644	8,429	38	10	88	0	0	148	101,502	
	DK	606	162	464		30,568	48	260	75	1,510	1,122	102	1,992	0	24	652	172	398	<5	262	3,308	2,565	192	139	172	449	221	150	412	<5	0	251	46,282	
	DE	7,799	7,239	3,715	1,561		713	359	2,509	21,422	24,677	32,582	23,991	7	1,022	9,981	11,707	32,354	12	5,196	49,941	131,498	3,156	17,297	55,740	47,618	542	285	3,171	19	128	9,496	505,737	
	EE	58		26	23	2,805		0	<5	136	135	14	90	0	35	575	40	<5	0	10	381	436	0	5	37	90	73	<5	38	0	0	7	5,023	
	IE	242	87	49	70	10,814	11	0	13	1,178	1,173	14	901	0	6	14	153	145	9	73	253	592	178	98	54	101	13	<5	813	0	0	100	17,158	
	EL	192	507	217	167	6,609	5	7		1,092	1,279	24	2,052	59	<5	20	110	117	5	139	234	209	21	106	11	80	98	262	2,147	<5	0	1,664	17,437	
	ES	2,374	399	530	789	113,830	113	91	360		12,904	192	14,106	0	19	98	708	347	49	1,006	2,532	3,116	13,840	548	575	577	653	360	3,626	42	<5	3,295	177,082	
	FR	30,902	1,191	750	723	214,164	299	351	573	36,612		950	46,034	0	126	2,696	28,783	2,339	28	3,150	3,914	24,459	20,256	8,182	2,102	3,410	456	465	13,400	47	<5	3,855	450,220	
	HR	83	76	77	22	12,013	12	<5	<5	398	396		1,663	0	8	<5	97	375	0	8	1,305	219	9	115	3,311	161	18	45	181	0	0	198	173,821	
	IT	2,123	248	382	232	119,746	94	69	437	11,231	10,293	2,688		<5	51	189	866	1,067	123	971	5,568	3,058	521	4,624	2,353	1,287	189	309	3,009	20	12	1,966	173,727	
	CY	38	77	9	15	1,041	0	<5	268	112	85	22	108		0	0	37	<5	0	14	35	40	0	43	9	7	11	34	335	0	0	335	2,677	
	LV	35	14	23	119	3,140	43	0	<5	120	149	<5	98	0		458	27	162	<5	6	353	316	5	<5	8	35	6	<5	40	0	0	11	5,178	
	LT	73	52	27	116	7,799	71	<5	0	181	211	<5	183	0	93		35	32	0	15	44	983	<5	45	0	76	20	<5	19	7	0	13	10,103	
	LU	10,714	5	56	19	27,779	<5	<5	34	741	7,730	107	1,466	0	13	7		386	<5	225	252	1,069	668	219	733	201	12	19	169	0	0	234	52,863	
	HU	313	164	200	88	43,151	<5	20	19	1,026	1,182	150	1,610	8	11	<5	257		<5	85	1,613	1,632	80	650	1,057	2,997	5	9	394	0	0	177	56,902	
	MT	36	26	19	18	2,574	0	<5	19	401	262	31	982	0	40	13	39	41		<5	61	183	0	15	13	33	<5	34	32	0	0	121	5,003	
	NL	22,680	589	455	399	131,859	188	756	1,065	5,617	4,972	1,061	3,904	0	50	3,655	1,063	4,299	8		2,187	17,009	2,979	3,060	2,597	4,392	89	73	3,517	<5	0	750	219,276	
	AT	747	424	736	271	262,296	18	31	59	1,420	2,097	829	7,696	0	24	13	409	7,745	5	1,156		6,012	691	1,261	14,247	9,369	87	98	1,259	0	21	1,459	320,480	
	PL	670	92	237	372	77,656	28	56	108	2,704	2,922	94	3,255	0	136	23	451	519	<5	280	1,059		56	267	501	1,224	40	21	384	<5	0	470	93,630	
	PT	433	76	53	51	21,157	15	33	114	21,357	3,012	25	1,459	0	0	19	313	14	<5	101	578	390		95	52	124	63	25	293	0	0	600	50,453	
	RO	309	389	200	21	27,847	0	13	132	1,859	1,932	206	2,237	0	13	<5	125	500	<5	53	1,074	721	86		314	476	<5	<5	113	0	0	145	38,774	
	SI	105	58	48	10	9,784	<5	43	9	261	413	2,252	1,410	0	<5	<5	17	361	<5	27	1,555	166	<5	133	21	402	<5	<5	34	0	0	83	17,205	
	SK	93	99	1,000	16	23,060	9	<5	14	966	1,084	64	1,012	0	12	<5	61	1,093	<5	28	1,080	1,983	401	570	225		21	7	142	<5	0	109	33,154	
FI	208	133	159	149	18,979	3,933	74	23	1,015	1,161	796	737	0	181	1,399	158	52	0	111	1,140	2,818	181	259	139	544		290	721	<5	0	168	35,529		
SE	491	93	305	971	48,570	871	402	92	1,795	2,040	750	1,243	0	541	4,424	179	424	<5	156	1,373	13,712	443	731	723	2,623	1,170		1,050	16	0	261	85,450		
UK	1,887	289	212	560	87,931	7	439	155	11,160	9,686	300	6,060	0	12	165	1,230	707	24	966	1,621	4,889	749	490	491	958	176	201	357	5	15	768	132,510		
IS	30	6	<5	43	960	70	0	11	82	141	<5	71	0	33	92	14	0	0	14	260	199	0	35	7	12	<5	<5	29	0	0	20	2,136		
LI	13	0	6	13	3,403	0	<5	0	8	<5	5	36	0	0	<5	10	8	0	0	372	20	0	0	6	5	<5	<5	0	0	0	398	4,311		
NO	404	157	62	2,943	15,252	609	35	<5	1,227	922	978	1,763	0	58	5,786	62	547	<5	142	477	2,210	280	230	137	67	193	909	2,633	23	0	61	38,170		
CH	1,668	193	184	121	180,590	5	88	75	2,920	9,462	167	38,016	<5	13	55	854	548	17	486	5,841	1,783	295	409	1,051	928	56	63	1,026	<5	41	0	246,961		
unkn.																				6,889							19	<15				6,918		

* EL and CY: 2018 figures

Source Administrative data PD A1 Questionnaire 2020

Source: De Wispelaere, Frederic, Lynn De Smedt & Jozef Pacolet (2020), *Posting of workers - Report on A1 Portable Documents issued in 2019*, HIVA-KU Leuven

As we can verify, in 2019, Germany is the country that receives the most posted workers (more than half a million workers), and most of them are coming from Poland (131 thousand). Germany is also the Member state that is sending most of their workers to the countries that take part in this study. This means, in the same year, more than 9 thousand German workers are posted to Bulgaria, 6.6 thousand to Greece, 77.7 thousand to Poland, 21.2 thousand to Portugal and 23 thousand to Slovakia. This means Germany has an important role on the regulative process of posting work once receives and sends most posted workers to other EU member states, inclusive those that are included in this study.

The evolution of these figures has had some dramatic changes in the last decade, as the following table shows.

Table 6 PDs A1 according to Article 12 of the Basic Regulation issued by sending Member States, 2010-2019

Sending MS	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Change 2019 vs 2018	% Numbers
EU-27	1,023,896	1,162,056	1,197,285	1,300,598	1,416,864	1,452,627	1,578,130	1,682,304	1,759,461	3,135,123	1,375,662	78.2%
EU-28	1,056,005	1,197,424	1,230,433	1,330,533	1,440,365	1,484,335	1,611,777	1,716,084	1,796,651	3,177,941	1,381,290	76.9%
EU-15	666,768	715,861	709,726	749,048	800,696	832,614	903,484	1,010,337	1,171,075	2,528,176	1,357,101	115.9%
EU-13	389,237	481,563	520,707	581,485	639,669	651,721	708,293	702,659	625,576	649,765	24,189	3.9%
EFTA	2,309	2,603	459	10,734	14,332	10,972	11,918	17,566	17,478	30,294	12,816	73.3%
Total	1,058,314	1,200,027	1,230,892	1,341,267	1,454,697	1,495,307	1,623,695	1,733,650	1,814,129	3,208,235	1,394,106	76.8%
BE	49,862	55,931	56,103	58,522	58,611	63,467	69,836	76,719	76,596	85,870	9,274	12.1%
BG	5,734	7,429	11,091	12,861	13,275	14,811	15,656	14,781	13,731	14,792	1,061	7.7%
CZ	15,829	16,102	15,358	13,155	10,380	10,799	11,145	11,806	10,255	10,644	389	3.8%
DK	9,262	11,491	6,176	5,320	3,869	7,288	6,508	8,250	9,181	10,211	1,030	11.2%
DE	201,436	226,850	221,650	227,008	232,776	218,006	231,766	332,091	409,340	1,678,407	1,269,067	310.0%
EE	13,580	15,322	14,889	11,689	7,147	5,415	6,327	6,305	6,915	7,200	285	4.1%
IE	1,935	3,106	3,512	3,457	3,261	3,616	3,303	3,222	3,687	3,383	-304	-8.2%
EL	642	888	1,661	1,688	2,325	2,908	3,941	4,253	6,583	6,583		
ES	44,087	48,479	48,132	63,519	76,286	86,943	100,469	110,868	123,670	136,096	12,426	10.0%
FR	133,896	144,256	130,247	123,580	119,727	130,468	132,012	109,168	117,739	122,552	4,813	4.1%
HR				8,716	24,060	33,381	36,142	41,253	48,613	46,299	-2,314	-4.8%
IT	35,430	35,611	48,369	55,509	69,279	83,277	106,395	129,732	148,863	175,908	27,045	18.2%
CY	81	38	35	66		96	169	81	81	81		
LV	3,424	4,287	2,846	3,237	1,655	1,801	2,446	1,629	812	2,629	1,817	223.8%
LT	6,462	9,515	11,306	14,105	16,683	21,430	25,371	26,548	30,801	32,005	1,204	3.9%
LU	55,852	39,385	39,758	28,481	50,345	50,440	55,364	58,686	64,301	75,131	10,830	16.8%
HU	40,640	57,848	63,742	66,415	65,655	59,711	61,365	62,873	54,326	57,454	3,128	5.8%
MT	442	318	327	322	145	88	110	145	252	305	53	21.0%
NL	15,190	25,986	24,199	25,429	37,775	27,141	28,394	22,305	26,597	25,074	-1,523	-5.7%
AT	25,957	28,806	35,671	36,959	41,114	55,320	62,526	50,303	88,117	98,965	10,848	12.3%
PL	221,126	227,930	246,214	262,714	266,745	251,107	259,999	235,836	238,525	246,849	8,324	3.5%
PT	58,923	54,043	54,580	81,687	74,735	64,020	62,005	64,320	51,905	58,887	6,982	13.5%
RO	29,730	59,363	44,318	51,739	57,194	46,871	48,710	46,733	41,950	44,864	2,914	6.9%
SI	23,944	42,485	65,727	83,659	102,920	126,153	150,922	163,876	85,999	95,339	9,340	10.9%
SK	28,245	40,926	44,854	52,807	73,810	80,058	89,931	90,793	93,316	91,304	-2,012	-2.2%
FI	2,187	2,668	3,181	3,332	2,786	3,725	3,707	3,541	4,293	4,428	135	3.1%
SE		2,993	3,339	4,622	4,306	4,287	3,611	3,099	3,013	3,863	850	28.2%
UK	32,109	35,368	33,148	29,935	23,501	31,708	33,647	33,780	37,190	42,818	5,628	15.1%
IS	376	377	293	269	140	179	126	162	151	197	46	30.5%
LI	61	63	166	119	89	65	65	32	32	229	197	615.6%
NO	1,872	2,163	n.a.	n.a.	3,252	n.a.	n.a.	2,100	1,479	1,940	461	31.2%
CH			n.a.	10,346	10,851	10,728	11,727	15,272	15,816	27,928	12,112	76.6%

* EL and CY: 2018 figures

Source Administrative data PD A1 Questionnaire 2020 and previous years

Source: De Wispelaere, Frederic, Lynn De Smedt & Jozef Pacolet (2020), *Posting of workers - Report on A1 Portable Documents issued in 2019*, HIVA-KU Leuven

The following table presents the number of PDs A1 issued by receiving member state in the period 2010 to 2019.

Table 7 PDs A1 issued according to Article 12 of the Basic Regulation, by receiving Member State, 2010-2019

Receiving MS	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Change 2019 vs 2018	
											Numbers	%
EU-27	952,145	1,077,135	1,068,846	1,153,158	1,235,467	1,269,951	1,379,339	1,481,663	1,550,740	2,773,734	1,222,994	78.9%
EU-28	986,466	1,114,382	1,109,212	1,196,680	1,286,360	1,324,295	1,436,565	1,541,250	1,611,572	2,906,244	1,294,672	80.3%
EU-15	915,283	1,038,836	1,030,874	1,118,419	1,205,586	1,235,168	1,336,001	1,424,617	1,470,941	2,502,434	1,031,493	70.1%
EU-13	71,183	75,546	78,338	78,261	80,774	89,127	100,564	116,633	140,631	403,810	263,179	187.1%
EFTA	71,848	94,423	81,973	98,201	109,497	124,070	130,354	131,025	142,179	291,578	149,399	105.1%
Total	1,058,314	1,208,805	1,230,614	1,340,671	1,454,573	1,495,307	1,623,695	1,730,562	1,807,375	3,206,680	1,399,305	77.4%
BE	90,540	125,107	125,264	134,340	159,749	156,556	178,319	167,335	156,695	218,230	61,535	39.3%
BG	4,483	4,006	3,896	3,805	3,267	3,325	3,867	3,508	4,665	13,840	9,175	196.7%
CZ	15,892	17,144	17,808	18,603	17,165	19,144	22,743	24,227	30,557	101,502	70,945	232.2%
DK	9,608	11,002	11,044	10,763	10,869	13,352	15,698	15,592	20,337	46,282	25,945	127.6%
DE	250,054	311,361	335,862	373,666	414,220	418,908	440,065	427,175	428,935	505,737	76,802	17.9%
EE	1,235	1,904	2,325	2,998	2,951	2,315	3,733	3,025	3,175	5,023	1,848	58.2%
IE	5,014	6,084	4,674	5,556	3,973	4,039	5,760	6,171	7,816	17,158	9,342	119.5%
EL	10,656	7,763	6,795	4,820	4,692	5,683	6,383	8,109	11,214	17,437	6,223	55.5%
ES	63,304	47,640	46,075	46,507	44,825	47,369	52,353	60,488	63,939	177,082	113,143	177.0%
FR	160,532	161,954	156,490	182,219	190,848	184,695	203,019	241,363	262,126	450,220	188,094	71.8%
HR				1,753	4,560	7,139	9,835	12,791	9,844	20,821	10,977	111.5%
IT	60,460	64,223	48,663	47,445	52,481	59,095	61,321	64,669	73,927	173,727	99,800	135.0%
CY	1,702	1,042	1,106	956	944	716	972	1,256	1,666	2,677	1,011	60.7%
LV	1,851	1,788	1,516	1,235	1,504	1,431	1,080	1,356	2,200	5,178	2,978	135.4%
LT	1,850	2,248	3,497	2,274	1,930	2,404	2,018	2,261	3,035	10,103	7,068	232.9%
LU	27,730	24,295	19,741	20,503	21,763	21,749	26,591	32,664	36,479	52,863	16,384	44.9%
HU	8,457	9,924	9,900	8,887	8,955	8,743	11,312	12,924	17,090	56,902	39,812	233.0%
MT	1,308	1,449	1,052	952	1,062	1,453	2,318	2,513	2,636	5,001	2,365	89.7%
NL	91,560	105,885	99,416	100,423	87,817	89,411	90,873	111,522	126,342	219,276	92,934	73.6%
AT	59,642	76,335	76,445	88,596	101,015	108,627	120,150	141,046	119,907	320,480	200,573	167.3%
PL	12,877	16,013	16,033	14,387	14,521	17,897	17,818	20,620	26,714	93,630	66,916	250.5%
PT	12,193	13,345	11,422	10,696	12,833	15,374	18,109	22,639	28,964	50,453	21,489	74.2%
RO	9,445	10,476	11,224	10,894	9,717	10,709	10,028	12,036	15,883	38,774	22,891	144.1%
SI	3,391	2,676	3,340	4,507	6,550	5,685	5,146	6,357	9,173	17,205	8,032	87.6%
SK	8,692	6,876	6,641	7,010	7,648	8,141	9,694	13,759	13,993	33,154	19,161	136.9%
FI	20,205	22,183	22,522	19,917	16,589	18,618	21,014	22,252	19,579	35,529	15,950	81.5%
SE	19,464	24,412	26,095	29,446	33,019	37,373	39,120	44,005	53,849	85,450	31,601	58.7%
UK	34,321	37,247	40,366	43,522	50,893	54,344	57,226	59,587	60,832	132,510	71,678	117.8%
IS	543	559	385	392	338	608	1,373	1,739	982	2,136	1,154	117.5%
LI	572	763	510	925	417	803	842	715	818	4,311	3,493	427.0%
NO	18,771	30,523	16,170	18,778	21,250	24,958	23,844	22,882	26,570	38,170	11,600	43.7%
CH	51,962	62,578	64,908	78,106	87,492	97,701	104,295	105,689	113,809	246,961	133,152	117.0%

Source Administrative data PD A1 Questionnaire 2020 and previous years

Source: De Wispelaere, Frederic, Lynn De Smedt & Jozef Pacolet (2020), *Posting of workers - Report on A1 Portable Documents issued in 2019*, HIVA-KU Leuven

The Bulgarian report states that “the issue of working conditions is also a source of controversy, as posted workers may face language and cultural barriers, leading to poor working conditions and limited access to social protection. Finally, the impact of posting of workers on social welfare has been a topic of concern, as posted workers may face difficulties in accessing social security benefits, such as healthcare and pension rights”. They have concluded that, “in 2015, only 0.5% of Bulgaria's workforce was posted to other EU Member States, and the rules on inbound posted workers applied to only 3,300 citizens of other EU Member States”.

In Portugal, “the Construction sector (NACE F) has the large majority of posted workers (64,7%). The Administrative and Service activities represent 22,2% of those posted abroad. The Manufacturing sector (NACE C) represents only around 7% of all communications”. As far it can be understood from most national reports, although the aim of this study was focused on the Manufacturing sector, most registered posted workers are working in the construction sector.

3. Scenarios

With the evolution of the movement of posted workers in Europe we can understand that there are around 3 million posted workers in Europe, being Germany and France the member-states that have the most relevant part. We know that most of them are allocated to the construction sector (NACE F). Germany is, nevertheless, the member state with more intensive exchange with the member states involved in this “Posting Prospects” study.

Using the above-mentioned series data on sending and receiving posted workers, we can resume the information relative to the countries involved in the study. The two following tables provide that data.

Quantity of A1 Portable Documents issued by sending member state (in thousand)

	2010	2015	2019
EU27	1024	1453	3135
Bulgaria	5.7	14.8	14.8
Germany	201.4	218.0	1678.4
Greece	0.6	2.9	6.5
Poland	221.1	251.1	246.8
Portugal	58.9	64.0	58.9
Slovakia	28.2	80.0	91.3

From this table we understand a total volume of sending posted work increasing along the last decade. In fact, it triplicated in 9 years for EU27. Germany was one of the major contributors for this growth. Except for Portugal, where the figures are more or less stable, all other countries presented in this project increase their number of sending workers for posted positions in all sectors. We can assume that it is also true for the manufacturing sector, although in, eventually, lower numbers. The following table presents the figures related to the receiving posted workers.

Quantity of A1 Portable Documents issued by receiving member state (in thousand)

	2010	2015	2019
EU27	952	1270	2774
Bulgaria	4.5	3.3	13.8
Germany	250.0	418.9	505.7
Greece	10.7	5.7	17.4
Poland	12.9	17.9	93.6
Portugal	12.2	15.4	50.5
Slovakia	8.7	8.1	33.2

Here we can see also a trend for growth in all countries, as well for EU27. This means that in decade before the Covid19 pandemic there was an increase of the quantity of A1 Portable Documents issued by receiving member state.

The balance between the sending and receiving posted workers is the following:

	2010	2015	2019
EU27	72	183	361
Bulgaria	1.2	11.5	1
Germany	-48.6	-200.9	1172.7
Greece	-10.1	-2.8	-10.9
Poland	208.2	233.2	153.2
Portugal	46.7	48.6	8.4

Slovakia	19.5	71.9	58.1
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These figures can reveal a few trends. One, Germany has been a country that usually has been receiving more posted workers than sending, but in 2019 that reversed strongly. Second, and except for Greece, countries involved in the Posting Prospects project are countries that are sending more posted workers than receiving. Third, there is no proportion between the quantity of the labour population and the quantity of posted workers involved.

The fact that we do not have data relative to the post-pandemics period, implies that present trends are not visible. Thus, we will consider possible trends assuming that most “anomalies” (as the pandemics or warfare disturbances) are not influencing long periods. If so, we would have to consider some relevant periods with almost no posting work. This, eventually, almost happened during the COVID19 period, but the prospects for posting were quickly reactivated. We know, as well, that the Ukraine invasion is still disturbing the potentials to increase posting labour. But, in both cases, it is envisaged that such an “anomaly” will not persist for a long period of time.

The following scenarios are not quantitatively measured in detail once we believe - based on the literature and national studies - that there will be no drastic changes on the observed trend. However, we can have some approximative assessment of the trends according to the scenarios. Figures for 2010, 2015 and 2019 remain the same, once they are data based on the above tables based on the De Wispelaere et al. (2020) calculations. Another factor that must be considered is associated with the sector under analysis: the figures measuring the trends are related to the total of posted work, and the main conclusions of this project should be related just to the Manufacturing sector (NACE C).

3.1. Scenario 1 - Posting workers in global value chains

The Bulgarian case establishes a foundation to a possible trend of posting movements in Europe. These researchers' analysis stated that the “limited extent of posting of workers in Bulgaria can be attributed to various factors. One possible explanation is that Bulgaria is not an attractive destination for foreign companies to provide services due to its relatively low economic development and wages compared to other EU countries” (Bulgaria report).

Using this argument to build the first scenario, it would be probable that most forms of posted work will be applied to more qualified workers that operate in firms that operate with/in global value chains. If so, the trends of variations between outgoing and incoming workers could be presented as follows:

	2010	2015	2019	2025*	2030*
EU27	72	183	361	400	500
Bulgaria	1.2	11.5	1	5	10
Germany	-48.6	-200.9	1172.7	300	100
Greece	-10.1	-2.8	-10.9	-20	-30
Poland	208.2	233.2	153.2	150	200
Portugal	46.7	48.6	8.4	10	15
Slovakia	19.5	71.9	58.1	30	20

Note: * Data is hypothetical

The figures related to 2010, 2015 and 2019 represent the result of the difference between outgoing and the incoming workers based on the previous tables. Negative figures means that there are more posted workers in each sending country. Positive ones means that there are more outgoing workers. Greece, for example, is receiving more posted workers than sending. Poland, Portugal, or Slovakia is sending more workers than receiving.

When these firms are supplying others, they need occasionally that the supplier intervene in some way at the client's firm, either to set up production processes or train other operators in a new system. This means that operators sent to client firms are using the posting mechanism to work abroad in a certain period of time.

Posting is mostly common in the automotive sector, and, as well, in other sectors, where some system developers, maintenance engineers or specialists, or team leaders at production lines are sent to "client" firms located in different tier of the industry.

For this reason, we might accept that the global trend in Europe (EU27) will continue to be based on the possibility of sending posted work continuously growing more than receiving. Eventually, Germany and Poland could be member states where the difference is larger than in other countries. In our hypothesis, there is no reason to think that Greece would change the observed trend (receiving more than sending).

Once again, the figures presented in the above table are just indicative, once they are referred to the total posted work in the European Union, and do not consider just the Manufacturing sector, nor the situation in non-EU-27 countries.

3.2. Scenario 2 - Posting precariat

There are sound foundations to expect the possibility of having a trend of posting in Europe based on the increasing numbers of workers who work in precarious jobs and conditions. According to the Bulgarian researchers, “The practice of posting workers, which involves the temporary relocation of employees to work in (another) EU country, can be subject to various abuses and violations of economic rights. The cases concerning the payment of salaries between outbound posted workers and their employers are classified depending on the type of the infringement that resulted in non-payment or incorrect calculation of the wages” (Bulgaria report).

In this scenario it is expected that less qualified work can be used in other companies of the same sector or can use that form of contract to perform work in another country without employment bond with the sending company. It can also be argued that temporary labour companies will grow in size, scope and geographic areas and relocate precariat (European or abroad) to increase production and/or profits of their client firms. These intermediary companies of the precariat (within one group or between companies of the metal sector) will be part of the value chain of the metal sector. Those are cases where short term contracts will become a predominant form of precarious employment relations.

Precariousness can be controlled by different European institutions and national authorities. However, these organisations are not expected to be sound and strong handed in terms of posting control. European countries tend to have their differentiated interests and do not wish to do many changes in these fluxes. As most posted workers are sent to neighbouring countries, especially in Central Europe, this scenario reveals that such posting is done due to the level of labour costs, more than due to the labour skills that would exist in the peripheral countries.

	2010	2015	2019	2025*	2030*
EU27	72	183	361	400	500
Bulgaria	1.2	11.5	1	15	30
Germany	-48.6	-200.9	1172.7	200	-100
Greece	-10.1	-2.8	-10.9	10	30

Poland	208.2	233.2	153.2	50	250
Portugal	46.7	48.6	8.4	20	60
Slovakia	19.5	71.9	58.1	80	120

Note: * Data is hypothetical

The precariat can be used to maintain the labour costs lower to enable market competitiveness. Nevertheless, this competitive strategy is also not expected to be frequently applied to companies in higher levels of global value chains due to quality concerns and preventing industrial conflict.

Therefore, it can be argued that this scenario will not be the most significant in terms of the total number of posted workers in the European economic area. It will be, therefore, important in the NACE F (construction industry) sector, but not in the manufacturing sector. We believe that the posted work in this NACE C (manufacturing) sector is mostly performed for maintenance, design, and programming activities. Such conclusion is provided by national interviews data and further literature.

3.3. Scenario 3 - recommendations accepted

This scenario would represent the overall situation of posting work considering the acceptance of recommendations made by the project partners. It could be the scenario where a growth in the number of posted workers could eventually grow, once the bilateral recognition of working conditions will be accepted and regulated. Such acceptance can increase the attractiveness of this form of work in the European area.

	2010	2015	2019	2025*	2030*
EU27	72	183	361	200	100
Bulgaria	1.2	11.5	1	-10	0
Germany	-48.6	-200.9	1172.7	400	10
Greece	-10.1	-2.8	-10.9	10	30

Poland	208.2	233.2	153.2	100	50
Portugal	46.7	48.6	8.4	0	-10
Slovakia	19.5	71.9	58.1	10	0

Note: * Data is hypothetical

However, it is expected that the European Labour Authority (ELA)¹ would be working effectively. For example, ELA should systematise and exchange information about the receiving countries. In fact, the Posted Workers Directive 96/71/EC – and the amending Directive 2018/958/EU - and Posted Workers Enforcement Directive 2014/67/EU fall under the remit of the ELA. The latter was created to assist EU countries and the European Commission to ensure that rules on labour mobility and social security coordination are enforced in a fair, simple, and effective way.

3.4. Scenario 4 - business as usual

This scenario helps to understand the main streams on the use of posted work. As we acknowledged from the case studies, there is a huge diversity of cases where posted work has been used. The predominant trend is the one related to the construction sector. However, this sector was not an object of study in this project.

One statement in the Portuguese literature review report says that “according to CGTP-IN (General Confederation of Portuguese Workers), it has proven to be very difficult to unionise posted workers in Portugal. Highly qualified technicians are not interested in affiliating to Portuguese trade unions and posted workers in agriculture (whose majority is from Bulgaria and Romania) are also reluctant to become union members” (p. 14).

The Bulgarian report on literature review stated that “the issue of working conditions is also a source of controversy, as posted workers may face language and cultural barriers, leading to poor working conditions and limited access to social protection” (p. 1).

¹ For further details see <https://www.ela.europa.eu/en>.

	2010	2015	2019	2025	2030
EU27	72	183	361	500	800
Bulgaria	1,2	11.5	1	0	-10
Germany	-48.6	-200.9	1172.7	800	2000
Greece	-10.1	-2.8	-10.9	-20	-50
Poland	208.2	233.2	153.2	50	0
Portugal	46.7	48.6	8.4	20	50
Slovakia	19.5	71.9	58.1	50	100

Note: * Data is hypothetical

In this scenario, the hypothetical data referred to 2025 reflect only the post-Covid19 possibility, as an intermediate period, and 2030 assuming the extrapolated data of the pre-pandemic decade.

This means that the future “Business as usual” trend will represent an increase of sending posted labour from these countries. Again, we are considering values that include the NACE F (construction) sector. But, most probably, the sending values are mostly referred to qualified workers instead of less qualified work.

3.5. Summary of scenario exercises

We tried to develop four major scenarios related to the potential trends of use of posted work.

The four scenarios included Scenario 1 - Posting workers in global value chains, Scenario 2 - Posting precariat, Scenario 3 - recommendations accepted and Scenario 4 - business as usual.

The latter fourth scenario is an extrapolation of the present trends.

The quantity of posted workers may not vary in the next few years, but it is possible that scenario 3 (recommendations accepted) is the only one that could be more favourable for an expected growth. One could envisage that the precarization can also increase significantly, especially the one which is not performed under regulated conditions (scenario 2). However, the signs for a possible increase are under surveillance in all European countries, and there are means to control it.

4. Conclusions

Given the lack of sound statistics, this report based the construction of scenarios on accepting the posted data for the overall economy as a proxy of the manufacturing sector in the analysed countries. In fact, posted work in the manufacturing sector (NACE C) does not necessarily have the same characteristics of whole posting activities. It is also important to assume that the definition of posting work is not directly related with migration labour. A worker that will be posted has a contract in a sending company and will work for an agreed period of time in a receiving company. It is a contracted labour.


We have tried to assess four scenarios of future developments of manufacturing posted work in Europe. That is why we have considered scenarios with relevance for potential trends that can be observed for the sector as whole in Europe. One scenario (1) considers that the posting workers have an intrinsic relation with the developments of global value chains. In other words, it is a scenario of a more globalised manufacturing environment where Europe in average, and its member states, in particular, are sending more labour than receiving.

The scenario 2 is about precarisation of labour, and that can affect the type of work that is posted. Is possible that the labour mobility in Europe can increase precarisation and wage dumping. How far this influences the volume of posting is not clear. Precarisation can decrease the volume of posting movements in Europe if companies prefer to cut costs by providing a precarious worker instead of a regulated employee.

A third (3) scenario considers that EU recommendations are fully accepted and the posting of workers is under the approved regulations and directives. As these regulations protect the worker in a posted situation, it happens that each member state had transposed the directive in specific ways. This means that there are still misunderstandings about the interpretation of the directives and the role of European agencies has not fully been achieved. Monitoring and control should be increased by those agencies in articulation with the national ones. This could be the most positive scenario for the survival of the welfare state. However, the situation will still face difficulties if recommendations are not meant to protect labour and provide better working conditions.

And, finally, we proposed a Scenario 4 that considers “business as usual”. This means that the present situation would continue to be not very clear to national agencies, companies, and social partners. Practices in the manufacturing sector will continue as before the pandemic period, which will not mean a dramatic increase of posting work (as in scenario 1), but this form of contract can tend to decrease due to costs reduction and bureaucratic complexities that companies will try to avoid.

As mentioned in the report of literature review from Portugal “all collective bargaining agreements need to provide indicators that make estimations about the number of workers covered and the number of companies represented by both parties. These indicators can be used to improve our understanding of the process of posting workers” (p. 21). This means that the information on posted workers should be shared among social partners and be an object of dialogue and negotiation across the countries under analysis and other member states. When that happens, it is likely that the posted workers would be better protected and under better working conditions. Otherwise, the pressure from manufacturing companies to reduce costs, and in particular, the labour costs, and increase profits, will mean a decrease in the practice of posted work.



Posting of workers during
the COVID-19 pandemic,
current challenges,
and future prospects



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