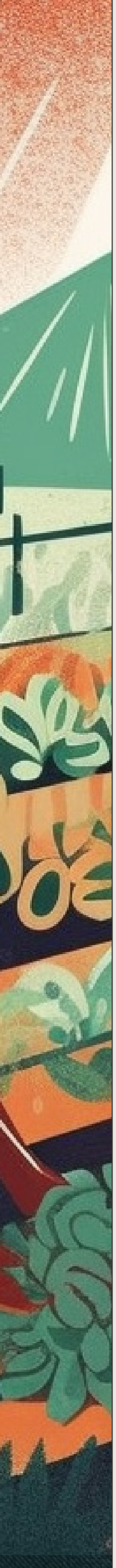

Migrant Labour in the F2F Supply Chain in Italy

Employer Strategies and Policy Implications

WP6 Country Report – Italy

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Abstract

The report examines employers' attitudes and strategies on the employment of migrant workers in the F2F supply chain, focusing on agriculture, food processing, and catering/restaurants. Drawing on a 2025 survey of 300 small and medium enterprises, focus groups with sectoral stakeholders, and analysis of existing data, the research analyses how employer strategies shape formal and informal employment patterns and migrant workers' vulnerabilities. The findings reveal migrant workers' structural role in these sectors: 84.9% of agricultural companies, 86.1% of restaurants, and 67% of food processing firms employ foreign workers, with 94.9% concentrated in unskilled manual positions. Agriculture (81.4% male) and food processing (78.8% male) are male-dominated, while the largest migrant groups are Moroccan, Bangladeshi, and Pakistani workers, reflecting recently established (2015-2025) migration networks.

Employers' hiring decisions reflect both supply-driven constraints (particularly severe labor shortages as Italian workers tend to reject seasonal jobs and deteriorating working conditions) and demand-driven motivations emphasizing flexibility and cost reduction. Recruitment occurs predominantly through informal channels, with formal systems (public employment centers, Flows Decree quotas) proving too slow and bureaucratic, particularly for seasonal agricultural needs. Stakeholders, even though representing different interests, agreed that coordinated regulatory reforms are needed: they should address multiple factors producing migrant vulnerability to exploitation, from immigration law (delinking residence and integration from formal employment), to labour law (improving statutory minimums and contract stabilisation), to fiscal policy and enforcement (promoting systematic inspection, supply chain accountability).

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Executive Summary

The Italian WP6 national report contributes to the DignityFIRM project by inquiring employers' practices in Italy's food supply chain. It focuses on three sectors: agriculture, food processing and catering/restaurants (gastronomy), where migrant labour is particularly concentrated and informality remains entrenched.
The study investigates how employers' strategies influence formal and informal employment patterns, explores the determinants of migrant hiring, and assesses how informal practices shape workers' vulnerabilities.

The analysis draws on three sources: a review of existing studies and statistical data; a 2025 survey of 300 small and medium enterprises; and two focus groups with sectoral experts, employer associations, trade unions, and migrant workers. The mixed-method design allowed triangulation of quantitative trends with qualitative insights into employers' motivations, market dynamics, and regulatory challenges.
The data confirmed that foreign workers' concentration in food-related sectors is striking, with 84.9% of agricultural companies, 86.1% of restaurants, and 67% of food processing firms employing at least one foreign worker in 2024. Migrant workers are concentrated in manual, low-skilled positions: survey data shows 94.9% of migrants across the three sectors occupy unskilled manual roles, with less than 4% in managerial or office positions. Agriculture (81.4% male) and food processing (78.8% male) are male-dominated, while the largest migrant groups are Moroccan, Bangladeshi, and Pakistani workers, reflecting recently established (2015-2025) migration networks.

The survey shows that employers' decisions to hire migrant workers stem from an interplay of supply-driven constraints (labor shortages) and demand-driven motivations (flexibility, cost reduction). The same conclusions are confirmed by the focus groups, whose participants underlined that native workers increasingly reject these sectors not merely by preference but due to deteriorating working conditions. However, each sector presents its own specificity: agriculture shows the most pronounced emphasis on supply-driven factors due to extreme seasonal concentration, physical demands, and the sector's historical reliance on migrant labor. In restaurants the strongest emphasis is on demand-driven flexibility, particularly temporal flexibility for evening, weekend, and holiday work. The sector combines chronic labor shortages with structural characteristics (unpredictable customer flows, perishable products, extended service hours) that make flexible, low-cost labor especially valuable.
With regard to the relationship between formal and informal work, the data show that employers across sectors accept to substitute formal with informal labour arrangements, but the nature of this informality has evolved. Focus groups confirmed that while completely undeclared 'black' work has decreased due to increased labor inspections, 'grey' work has expanded consistently. Grey employment involves formally registered contracts that hide

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irregularities in wages, hours (workers actually work double or triple the declared hours), contributions (social security contributions are underpaid or not fully remitted) and classifications (workers are assigned lower job categories than their actual duties warrant). Survey data reflects this pattern: 34.3% of agricultural companies, 23.8% of restaurants, and 22% of food processing companies reported workers starting before completing formal procedures, suggesting systematic grey practices during peak periods.

A crucial issue emerging from the data is that of recruitment: across Italy, job search remains predominantly informal, with 87.3% of job seekers not using official channels. Only 2.4% of newly employed workers considered public employment centers (Centro per l'impiego) useful for finding their current job, and just 5.2% found private agencies useful. This is more pronounced for migrant workers and seasonal positions. In agriculture specifically, employers consider formal channels—public employment centers and the annual Flows Decree quota system for non-EU workers—too slow and bureaucratic to meet seasonal needs. Focus group participants reported severe delays at Embassies, where visa application backlogs mean seasonal workers arrive after harvest seasons have ended. Given formal channel failures, employers increasingly rely on informal recruitment through personal networks and word-of-mouth. Migrant communities play significant roles in linking employers with job seekers, particularly for asylum seekers: while this can facilitate rapid matching, it might also create dependency relationships and can facilitate exploitation.

Finally, with regard to the broader regulatory framework, the focus group underlined that need to address systemic deficiencies in recruitment channels, a fair and consistent approach towards labour standards enforcement, that focuses on the entire supply chain accountability, and the improvement of certification incentives for virtuous enterprises. Several stakeholders pointed to the persistent vulnerability of migrant workers who are highly dependent on their employers and face risks of deportation and irregularity even when they report exploitation. Lastly, broader reforms related to fiscal policies and statutory minimum wage were mentioned as possible paths to address structural drivers of informality.

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1. Introduction, Study Objectives and Data Collection

The DignityFIRM project focuses on economic sectors located across the entire food supply chain, including agriculture, breeding, food processing, catering and food delivery, referred to as F2F (Farm to Fork) sectors. This presence of migrant workers in these sectors in Europe is particularly high, as is the prevalence of informal employment.

In Work Package no. 6 (WP6), we adopt the perspective of employers and investigate their business strategies relating to the employment of native and migrant workers, and the imposition of informal labour relationships on both native and foreign workers, or the maintenance of formal work relationships. As these strategies are not independent, we study all possible outcomes of employers' decisions, including employing natives formally and informally, and employing migrants (including irregular migrants) formally and informally.

We define informality in the labour market broadly, to include all remunerative relationships that are not entirely or partially regulated by the state and that lack formal labour protections, contracts or social security coverage.

The objectives of WP6 are:
– to identify and assess the main labour market-related conditions, policies and actors that drive the informality of migrant labour in the F2F sectors in the studied countries,
– to analyse and explain the structural effects of the presence of informal migrant workers on the employment in the F2F sectors;
– to assess the consequences of migrants' informal labour market status on their precarious situation (defined in various dimensions).

When planning WP6 research activities, our line of reasoning was as follows; the starting point of our considerations was the scale of migrant employment in the studied sectors and its determinants, that is, the motivations of employers to employ migrant workers (demand-driven migrant employment), the labour market segmentation and skill shortages (supply-driven migrant employment), and other factors, such as employers' non-economic preferences towards migrants or informality, tax morality of employers, and inefficient law enforcement. Investigating employers' decisions led us to a broader phenomenon of work substitution, that is, the possibility of replacing native workers with migrants and vice versa, or the possibility of replacing work with automation or work relations with service outsourcing (through temporary work agencies). Considering the heterogeneity of labour, we asked also about the potential for complementarity between

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natives and migrants, whereby both types of workers complement each other in terms of skills and are thus equally indispensable to the production processes. Additional issues that we studied included employers' recruitment strategies, the characteristics of positions and posts occupied by migrants, and the scale, forms and determinants of the informal employment among both migrant and native workers.

Finally, we analysed the economic, legal and social vulnerabilities of migrant workers that are related to informal employment, as well as the importance of regulatory frameworks (both actual and potential) in counteracting precariousness among the informally employed. This report is based on three data sources. Firstly, we conducted an extensive review of existing studies on migrant and informal employment in Italy, complemented by up-to-date, publicly available statistical data, particularly national statistics on the labour market and work and stay permits. The objective of this review was to provide key information for the next stage of the research (an employers' survey), including a list of policies, structural factors related to migrant employment, as well as selected statistical data on labour migration and labour market characteristics relating to informal work in Italy and in the F2F sector.

Secondly, in March-April 2025 we conducted a survey among 300 employers from three selected F2F sectors related to food production in Italy:

– agriculture (the codes according to the EU NACE classification, rev. 2: A01 and A03, except A01.15, that is, agriculture and fishing, except tobacco cultivation),
– catering (I56, gastronomy), and
– food processing (C10 except C10.9, food processing, except for the production of feed and animal food).

The survey included small and medium-sized private enterprises, i.e. enterprises with between 1 and 49 employees. The CATI interviews were conducted with business owners, their representatives responsible for managing the company or representatives of human resources departments responsible for recruiting and managing employees. Thirdly, three focus groups were organised with experts from two selected F2F sectors: one on agriculture (4 participants, June 2025) and two focus groups in gastronomy (4 participants, September 2025; 4 participants October 2025). These groups included migrant employers', representatives of employers' associations of the respective sectors, trade unions, experts and migrant workers. The focus groups aimed to validate the results of the survey, and gain a deeper understanding of broadly defined vulnerabilities of migrant workers working informally. They also aimed to discuss the actual regulatory framework for labour market vulnerabilities and consider possible regulatory frameworks that could address these vulnerabilities.

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2. Scale of formal/informal and native/migrant employment in the 3 sub-sectors

2.1 General context

According to the XV Annual Report "Gli stranieri nel mercato del lavoro in Italia 2025", as of January 1, 2025, there were 5.4 million foreign residents in Italy, representing 9.2% of the total population. The largest foreign community is Romanian (just over 1 million residents, or 20% of the total), followed by Albanians (416,000) and Moroccans (412,000). Between 2023 and 2024, the most dynamic growth was recorded among the Bangladeshi (+10.7%), Pakistani (+10.5%), and Ukrainian (+9.6%) communities.
Employment trends highlight the growing role of migrants in the Italian labour market: in 2024, foreign workers accounted for 2.5 million employees, equal to 10.5% of the total workforce. Employment among non-EU workers grew by 6.5% and among EU workers by 5%, compared to a 1% increase for Italian nationals.

The distribution of foreign workers across sectors underlines their structural role in key industries. In 2024, foreigners represented 30.9% of the workforce in personal and collective services, 20% in agriculture, 18.5% in hospitality and tourism (including restaurant services), and 16.9% in construction. Within these high-incidence sectors, the majority of workers are non-EU nationals, who account for 22.4% of employees in personal and collective services, nearly 15% in hospitality and tourism, and 14.9% in agriculture. Between 2023 and 2024, non-EU workers recorded employment increases across all major sectors, with particularly strong growth in agriculture (+18.8%). The data refer both to permanent and seasonal contracts.
Gender composition also varies by sector: construction (97.9%), agriculture (81.4%), and manufacturing (78.8%) remain overwhelmingly male-dominated, while women account for nearly half of employment in other service activities (49.9%) and one-third in commerce and repair services (32.7%).

Foreign workers are concentrated in specific occupational profiles. Among non-EU nationals, **the largest categories in 2024 were agricultural workers (459,574 contracts)**, personal care assistants (137,621), **waiters and similar professions (136,933)**, and construction workers (122,322). For EU citizens, the leading categories were likewise agricultural workers (156,955), personal care assistants (58,234), and waiters (45,225).

The **employers' survey** carried out by the University of Warsaw in 2025, further confirms the structural importance of migrant labour in Italy. Nearly eight out of ten companies reported

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employing foreign workers, with the highest presence in bar & restaurants (86.1%) and agriculture (84.9%), followed by food processing (67%). According to the survey, migrants are mainly concentrated in manual, low-skilled positions (94.9%), while their presence in managerial or office roles remains marginal (less than 4%). In terms of nationality, Bangladeshi, Moroccan, and Pakistani workers emerged as the most represented groups, reflecting broader demographic trends.

2.2 Agricultural sector

Agriculture represents one of the sectors most reliant on migrant labour. According to the XV Annual Report "Gli stranieri nel mercato del lavoro in Italia 2025", **in 2024, 249,722 non-EU agricultural employees were recorded, accounting for 24.6% of all employees in the sector.** The majority of these workers come from Morocco (15.1%), India (14.9%), and Albania (13.5%), which together represent nearly half of all non-EU agricultural employees. Moreover, important increases in hiring were observed for Sri Lankan workers (+63.1%), Egyptians (+54.0%), Bangladeshis (+40.7%), and Indians (+32.0%).

However, the share of non-EU nationals among self-employed agricultural workers remains extremely low (0.8% of the total). As a matter of fact, the **employer survey** also highlights strong dependencies within agriculture. More than 84% of agricultural businesses employ foreign workers, most of them in unskilled manual positions (98.8%). Employment is also mostly seasonal: according to the survey, 97.6% of migrant workers in agriculture are hired on seasonal contracts. Employers in agriculture also show a high intention to hire foreign workers in 2025 (30.3% vs. 17.3% general), suggesting structural labour demand.

Moreover, the **focus group** that we conducted with national stakeholders in the agricultural sector also confirmed these trends. According to the participants, over 32% of declared working days in agriculture are carried out by foreign workers. They stressed that seasonality is structurally embedded in the sector and the concentration of migrant workers in agriculture is not primarily linked to undeclared work, but rather to precarious or partially irregular contractual arrangements.

2.3. Food processing and gastronomy/restaurants sectors

Although non-EU migrant workers represent a significant component of the labour force in the restaurant sector and in food processing, as confirmed by the **survey**, literature on the characteristics and conditions of migrants employed in these sectors is underdeveloped, especially if compared to other sectors (agriculture and food delivery). Often, scholarly research into the agri-food sector focuses more on the first stages of food processing rather than on the final stage of the food chain. However, the issue of migrants' presence in the

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restaurant sector is becoming more and more visible, including in the **media** (F. Armillei, 2024).

According to a recent analysis, the restaurant sector in Italy has undergone a significant transformation over the past decade, characterised by a steady and substantial increase in the employment of non-EU workers. Data from the Ministry of Labour shows that between 2014 and 2023, the share of non-EU workers among new hires in cooking and pizza-making positions rose from 23% to 34%. This growth has been even more pronounced among kitchen assistants, where non-EU workers represented 41% of new hires in 2014, climbing to 58% by 2023, with significant acceleration in the post-COVID years. The actual presence of migrants in the sector is likely even higher than these official figures suggest, as they exclude undeclared workers who are particularly common in the restaurant business. Growth has been more contained for positions involving direct customer contact, such as waiters (from 13% to 17%) and bartenders (from 9% to 10%). suggesting that migrant workers are concentrated primarily in back-of-house positions.

These data are confirmed by the ones provided by the employers' survey carried out by the University of Warsaw in 2025, according to which the majority of companies in both the food processing and gastronomy/restaurant sectors employed at least one foreign worker in 2024. The gastronomy sector showed a particularly high rate of 86.14%, while food processing had a substantial rate of 67%. The lower percentage in food processing (67%) compared to gastronomy (86.14%) may reflect differences in skill requirements, working conditions, or the degree of labour shortage experienced between these sectors. However, even in food processing, two-thirds of companies relied on foreign workers, indicating that migrant labour has become common across the entire food supply chain.

2.4 Undeclared employment

Undeclared work remains a structural challenge in Italy. According to the ISTAT 2023 report on the irregular economy, in 2021 there were 2,990,000 irregular workers (including both nationals and non-nationals), of which 2,177,000 were employees and the remainder self-employed. Compared with regular employment, this translates into an irregularity rate of 12.7%: in practice, out of every 100 regular workers, almost 13 operate in the black or grey economy. Disaggregated data by employment status show rates of 12.9% among employees and 12.3% among the self-employed. The phenomenon is most present in personal services (42.6% incidence), followed by **agriculture (16.8%)**, the tertiary sector (13.8%), construction (13.3%), and trade, transport, accommodation and **catering (12.7%)**.

As regards migrant workers, there are no official data on irregular employment broken down by sector. Estimating the number of migrants with irregular status remains challenging. According to the ISMU 30° Italian Report on Migrations, in 2023 there were around 458,000 irregular migrants in Italy, including both workers and non-workers. At the same time, studies

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have shown that cases of irregular employment of irregular migrants have decreased over the years, while most migrants currently employed irregularly actually hold a regular residence status (Osservatorio Placido Rizzotto, Agromafie e caporalato, 2022).

The agri-food sector is one of the areas most affected by undeclared work. According to estimates from the same report, in 2021 there were approximately 230,000 irregular workers in this sector, including about 55,000 women. These figures, which encompass both nationals and non-nationals, highlight the structural vulnerability of agriculture and food-related industries to irregular and exploitative labour practices.

The **employer survey** also suggests compliance challenges: over one-third of agricultural employers admitted having workers starting before completing formal procedures, a phenomenon that—although not directly measurable as undeclared employment—highlights potential **grey areas** between regular and irregular work.

The data are similar in other sectors, where approximately one-quarter of companies in the gastronomy sector (23.76%) and more than one-fifth in food processing (22%) reported that employees began working before all formalities were completed during peak seasons or urgent staffing needs in 2024. This practice must be understood in the context of the highly seasonal and casual nature of foreign employment in these sectors: 77.01% of companies in gastronomy and 71.64% in food processing employed foreigners on seasonal or casual work contracts. These figures suggest that both sectors rely heavily on temporary foreign labour and experience significant pressure to rapidly fill positions, potentially exposing migrant workers to vulnerable employment situations and reflecting the broader pattern of precarious working conditions documented in restaurants.

Concerning the agricultural sector specifically, stakeholders who participated in the **focus group on agriculture** also underlined that the irregularity rate is among the highest in this sector, especially for foreigners. While "black" (completely undeclared) work appears to have decreased over time, participants pointed to a **constant increase in "grey" employment that concerns both seasonal and permanent workers**, situations where the employment relationship is formally declared, but irregularities persist in wages and working hours. They also described serious **cases of exploitation**, particularly affecting Pakistani and Bangladeshi workers.

Focus group participants highlighted that the Italian immigration law (Bossi-Fini Law, n° 189 30/07/2002) contributes to this vulnerability, as the residence permit is strictly tied to the work contract. This dependency can expose migrants to coercion and foster irregular practices. Moreover, asylum seekers from Pakistan and Bangladesh often enter the labour market under weak contractual conditions while waiting for their asylum request to be processed.

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3. Employers' perspective: Determinants of formal/informal and native/migrant employment in the 3 sub-sectors

In this paragraph, we examine employers' perspectives and practices concerning migrant recruitment. According to the XV Annual Report "Gli stranieri nel mercato del lavoro in Italia 2025", in 2024, a total of 429,084 employers hired at least one foreign worker. This accounts for 36.5% of all companies that activated new employment contracts during the year.

Agriculture stands out, with 154,731 employers registering at least one new hire, of which 75,902 recruited migrants, representing nearly half (49.1%) of all agricultural employers. In the **tourism and catering chain**, demand for migrant labour also continued to rise: in 2024 it accounted for 19.6% of all hires in the sector, up from 18.1% in 2023 and just 13% in 2021. With over 229,000 contracts directed to migrant workers, **gastronomy and hospitality** remain the largest single area of migrant recruitment, showing a strong increase compared to 2023 (+10.4%). However, according to the 2024 Unioncamere report "Lavoratori immigrati", employers also reported persistent recruitment challenges: more than half (54.7%) of all planned hires of foreign workers proved hard to fill, including 51.1% of vacancies in the food-processing sector, highlighting both the structural dependence on and the difficulties in sourcing migrant labour.

3.1. Determinants of migrants' employment in the agricultural sector

Supply-driven factors: According to national stakeholders who participated in the focus group on agriculture, the main determinant of migrant employment lies in the **structural shortage of national labour**. Italian workers are largely unwilling to take up physically demanding and low-paid agricultural jobs, which creates a persistent segmentation of the labour market where migrants occupy seasonal and low-skilled roles.

Focus group participants underlined that recruitment of national workers is increasingly difficult, and that the existing entry channels (i.e. Flows Decrees) for foreign labour are inadequate to cover shortages due to **slow bureaucratic procedures and inefficiencies in the system**, such as delays in visa processing by embassies, which often compromise seasonal hiring. Therefore, most employers recruit migrant workers who are already in Italy, mainly through informal networks, while only a small share resort to official placement services.

Moreover, participants mentioned **employers' difficulty in planning labour needs**, especially for seasonal peaks, due to bureaucratic inefficiencies and unpredictable external factors (weather, market fluctuations). This reinforces employers' reliance on migrant workers in the agricultural sector. As a matter of fact, in the research we conducted in WP5, we found that many employers tend to diversify their workforce, combining a stable core of long-term

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migrant employees with short-term seasonal workers, who are considered more flexible (but also more likely to be employed informally).

These trends are also confirmed by the **survey of employers**. The difficulty of finding Italian workers is evident, with 43.4% of agricultural employers reporting the lack of Italian candidates as the main reason for hiring foreign workers. The distribution of migrant workers within agricultural companies is heavily concentrated in unskilled manual labour (98.8%) and seasonal work (97.6%), highlighting how migrants fill structural gaps in the labour market. Workforce planning remains complex: 30.3% of respondents declared that they plan to hire a foreign worker in 2025, while half of the employers (50.5%) do not plan to hire, but consider it probable they will employ foreign workers.

Demand-driven determinants: According to our research conducted in WP5, from the employers' perspective, resorting to migrant labour is also driven by the need to secure a **flexible and cost-effective workforce during peak** agricultural seasons. Migrants are often hired on short-term contracts, allowing companies to adjust labour input according to harvest fluctuations and weather conditions. A particularly relevant group are **asylum seekers**, who often have limited language skills, little knowledge of the system, and an urgent need for income. They are perceived as highly adaptable in terms of contracts, wages, and working hours. This perceived flexibility, combined with lower bargaining power, allows employers to **reduce labour costs** while meeting seasonal peaks.

These trends are also confirmed by the survey of employers. Flexibility emerges as a central factor: 44.4% of agricultural companies identify greater contractual flexibility as the main reason for hiring foreign workers, particularly seasonal workers on short-term contracts and non-standard working hours (51.8%). However, employers generally do not consider nationality a relevant criterion in hiring decisions (71.7%), indicating that the choice to hire migrants is driven primarily by operational needs rather than cultural preferences.

As for the determinants *of informal employment* in the agricultural sector, focus group participants revealed that hiring informally is a response to rigid regulations and bureaucratic inefficiencies. National stakeholders reported that the immigration system, particularly the Bossi-Fini Law (Law No. 189 of 30 July 2002), creates vulnerabilities by tying residence permits directly to work contracts. As a result, hiring asylum seekers or recently arrived migrants entails high uncertainty, since their legal status may change suddenly. To manage this risk, employers often resort to short-term or probationary contracts, which allow them to benefit from the workers' immediate availability while minimising potential risks. A recurrent practice is the use of "grey" employment: contracts are formally issued but hide irregularities in pay, hours, or working conditions. Employers justify this approach as a necessary strategy to adapt to seasonal labour peaks and to protect their businesses from labour shortages.

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Moreover, they mentioned, as a driver of informal and low-cost labour strategies in agriculture, the **structural pressures imposed by large-scale distribution** (*Grande Distribuzione Organizzata* - GDO). Farmers consistently report that retailers exercise disproportionate control over pricing, delivery schedules, and product standards, leaving producers with little bargaining power. Low purchase prices, combined with the risk of product rejection without payment, force employers to **reduce production costs**, with labour often becoming the main adjustable variable.

These dynamics are clearly reflected in **survey data**: 97.6% of firms employing migrant workers reported using seasonal contracts for these workers. Moreover, flexibility in working time is widespread, with over half of migrant workers (51.8%) employed in non-standard schedules (evenings, nights, weekends). Employers themselves highlight "greater contractual flexibility" (44.4%) and the "scarcity of Italian candidates" (43.4%) as the main reasons for hiring migrants. Such figures illustrate how systemic price pressures in the agri-food chain translate into precarious employment practices.

3.2. Determinants of migrants' employment in the food processing and gastronomy sectors

Similar to the agricultural sector, the main drivers of migrants' employment in the **food processing and gastronomy** sectors are linked to supply-driven determinants, as macro-demographic trends, labour shortage of native workers and quality of working conditions. The native labour shortage itself must be related to Italy's ageing and shrinking population, as well as to a lack of a protective labour environment in specific sectors. In this regard, the restaurant sector has become part of what labour market analysts describe as "jobs that Italians no longer want to do" – sectors including construction, agriculture, baking, textiles, restaurants, and care services. According to Coin (2024), this abandonment of certain work sectors should not be understood as a simple choice, but rather as the outcome of a dangerous deterioration of working conditions.

While demographic factors and ageing have created a structural dependence on immigrant workers across multiple sectors, in the restaurant sector, this shortage has been exacerbated by the declining enrolment in Italian hospitality schools and the emigration of young Italian chefs and hospitality staff seeking better wages and working conditions abroad (Coin, 2024). In parallel, the availability of migrant workers in restaurants is connected to increasingly solid migrant networks, intermediating with members of the communities in order to allocate jobs.

The pandemic accelerated this trend. After COVID-19, the restaurant sector experienced more exits than entries, with the National Social Security Institute (INPS) reporting a negative balance between those entering and leaving the sector in the years following the pandemic.

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Simultaneously, the use of migrant labour increased in an attempt to respond to staff shortages, suggesting a trend of substitution of Italian workers with migrant workers.

The **employer survey** seems to confirm this trend, and its underlying motivations, as amongst the main reasons for the employment of migrant workers, we found the labour shortage of native workers. In gastronomy, 42.57% of employers cited that not enough native workers apply for jobs, while in food processing the figure was 35%. In parallel, around 24% of employers across both sectors reported that the majority of applications they receive are from foreigners.

While supply-driven determinants appeared to play a crucial role in employers' choices, it is important to note that a significant percentage of employers also referred to **demand-driven determinants** for justifying their choice of hiring migrant workers, particularly in the gastronomy sector. In this field, 43.56% of employers positively referred to the fact that foreigners accept employment in more **flexible** forms, while 37% in food processing gave this reason. This data can be correlated with the one according to which in food processing 37% of employers stated there were "no special reasons for employing foreigners" (compared to 20% of respondents in agriculture and 22% in gastronomy agreeing to this statement). This might suggest that in food processing migrant employment may be driven more by supply-driven rather than demand-driven factors, and it relates to the more protective and less flexible labour environment of food processing, a sector that in Italy is regulated under the industry collective agreements, and not under the tourism collective agreements, as gastronomy is.

Finally, while not the primary driver, **wage considerations** play a role in migrant employment decisions. In gastronomy, 20.79% of employers acknowledged that foreigners accept lower wages, while 19% in food processing cited this reason. Although these percentages are lower than those for labour shortage and flexibility, they represent more than one in five employers who explicitly recognise wage differentials as a determining factor in their hiring choice. In this regard, it is worth mentioning that real wages received by irregular workers or migrants differ significantly from those of nationals.

According to a 2021 ILO report, as of 2019 the average hourly wage received by irregular workers (migrants and nationals) was approximately half of the gross hourly wage of regular workers, with differences ranging from 50 to 70 percent depending on the economic sector. Moreover, although migrants and nationals should be paid equally on the grounds of the collective contract, according to a ILO 2020 report, migrants are paid much less. Italy is one of the EU countries where the "migrant pay gap" is higher.

The need for **flexibility in the restaurant sector** is confirmed by additional data from the survey, as well as from the results of the focus group. On the one hand, it emerged that 77.01% of gastronomy companies employ foreigners on seasonal or casual work contracts, and that

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82.76% of companies employed foreigners during non-standard hours (evenings, nights, weekends, holidays). The participants in the **focus group** confirmed that migrant workers' willingness to accept flexible or unstable employment arrangements, often driven by their precarious legal status and limited alternatives in the labour market, makes them particularly attractive to employers in sectors characterised by seasonal fluctuations and irregular work schedules. At the same time, interviewees provided different - even though interconnected - explanations for the labour shortage of natives and the demand for flexibility.

On the one hand, employers present in the focus group framed the high percentage of migrant workers in the sector as connected to Italian workers' unwillingness to accept flexible schedules (evenings, Sundays, holidays). On the other hand, the representatives of the **unions** argue that this narrative obscures the reality of foreign workers, that "having probably an urgent need to work, accept conditions that our workers - and I say this positively - are starting to refuse because conditions are too low." According to the union, the flexibility demanded is not merely related to scheduling variation, but it entails forms of exploitation: workers are hired on part-time contracts of 15-20 hours, but actually work double or triple those hours; they are often misclassified - i.e., employed as dishwashers while performing chef duties - or subjected to violations of mandatory rest periods.

Yet, the **employers**, while acknowledging the validity of labour rights concerns and the need to increase workers' salaries, reframe flexibility through cultural and aspirational lenses. An employer with Bangladeshi workers in his restaurant argued that "there is a completely different work attitude" rooted in migrants' relationship with work and with its role in their lives. For these workers, overtime is "normally seen as something positive, the opportunity to earn something more". Many migrant workers in low-skilled positions hold two or three jobs, working on their days off elsewhere, driven by the need to send remittances home. The employer suggests that for migrants, "starting from much lower situations, in some way the social elevator still works a bit, or at least is perceived as a possibility", while Italian workers - who view restaurant work as merely a fallback rather than a profession - lack both the motivation to professionalise and passion for the work.

Participants in the focus group seem to confirm that native labour shortages and the demand for flexibility are interconnected factors in shaping employers' choice, and that this is met by the personal and economic conditions of certain groups of migrant workers, particularly represented in this sector (i.e. Bangladeshi or Pakistani), pressed by the need to provide their families and communities with remittances.

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4. Sectoral perspective: Business strategies concerning formal/informal and native/migrant employment - the actual situation and prospects for the future

4.1 Business strategies of substitution and complementarity in agriculture

According to the focus group with national stakeholders, in the agricultural sector employers perceive migrant labour as complementary rather than substitutive to native labour, given that Italians are generally unwilling to accept seasonal and low-skilled jobs. Migrants, instead, tend to be concentrated in manual and low-qualified tasks, largely due to **structural and individual barriers**, such as administrative and bureaucratic constraints linked to residence permits, lack of language skills, cultural obstacles, and above all, the **urgent need for immediate income** to support themselves and their families. These conditions often push migrants to accept low wages, precarious contracts, and even delayed or incomplete payments, as refusal could mean losing their only source of income.

The research we carried out in WP5 highlights differences between long-settled migrant workers, who have gradually gained awareness of their rights, and newly arrived Pakistani and Bangladeshi asylum seekers, who remain more exposed to informal intermediaries (such as caporali and landless cooperatives) and exploitative practices. For many, **agriculture is seen as a low-barrier sector**: it offers rapid entry into the labour market, allowing them to earn money. However, the combination of legal vulnerabilities, financial obligations, and the need for remittances often traps them in precarious agricultural work, making substitution with natives unlikely but reinforcing their presence in this segment of the labour market.

According to the focus group and to the research conducted in WP5, employers in the agricultural sector **often substitute formal with informal labour**, particularly during very short harvesting peaks when flexibility is crucial and administrative procedures are considered too burdensome. While the rise in labour inspections has acted as a partial deterrent, the spread of "grey work" remains significant: contracts are formally registered but hide irregularities in wages and working hours. Contractual strategies reported in WP5 include hiring asylum seekers on short-term contracts, using probationary periods to delay formalisation, or keeping only part of the workforce formally employed to reduce risks in case of inspections. These practices are also confirmed by the survey data: 34.3% of agricultural companies reported that workers had started before the completion of formal procedures (compared to 26.7% in the overall sample), and only 8.4% of migrant workers in agriculture hold permanent contracts.

With regard to automation, Focus group participants acknowledge that automation and digital technologies are increasingly relevant in agriculture, particularly as a response to

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labour shortages. They mentioned emerging roles linked to remote agricultural machinery or drone monitoring, but these remain **limited to larger, better-capitalised farm**s. For the majority of enterprises, migrants continue to be fundamental in low-skilled tasks, which automation cannot yet fully replace. Rather than substitution, national stakeholders in the focus group describe a form of complementarity: while automation may gradually change some production processes, the sector still depends heavily on migrant labour, especially for seasonal peaks. They stressed that training for intermediate roles is more urgent in the short term than advanced technological profiles. They also highlighted that the technological transition will depend on sustained public and private investment, whereas migrant workers provide an immediate and flexible solution to shortages.

Finally, previous research and the focus group highlighted that the outsourcing of migrant employment is a crucial aspect of the labour market. Generally, in Italy job search continues to be mainly **entrusted to informal channels**: **87.3% of job seekers do not go through official channels (see for instance** a 2021 report on the situation of the labour force). The intermediation action required from public employment centres is very limited. In 2017, on average, only a quarter of job seekers turned to them. Moreover, recourse to the *Centro per l'impiego* (Public employment centres) was considered useful by only 2.4% of the newly employed, and the percentage rises, but not by much, with reference to private agencies, considered useful by only 5.2% of the newly employed for the search of a current job.

The same applies to the migrant labour force, once they enter the territory either regularly or irregularly. They are mainly recruited through informal channels, including through informal mediators or eventually, especially in the agricultural sector, through gangmasters (*"caporali"*). The weakness of public institutions in charge of intermediating between labour supply and demand, as well as the low use by both employers and workers, are the main reasons for the emergence of these informal mediators. Informal recruitment can thus be considered a common feature in all the sub-sectors of the F2F chain, including agriculture and gastronomy. Migrant communities also play a significant role in linking employers with job seekers. With specific regard to asylum seekers, one mode of recruitment is through informal contacts between workers accommodated within the same reception system, particularly in the sector of restaurants and food delivery.

Focusing on the Italian agricultural sector, this is traditionally characterised by the presence of a **"intermediary"**, whose task is to informally put the worker and the employer in contact. The role of intermediaries therefore remains central to the resilience of the system, as companies often seek workers quickly and for short periods in order to cope with harvest peaks. Their activity is ambiguous: sometimes they act in the sphere of solidarity and reciprocity among peers, however often they have a criminal profile, carrying out illegal actions and exploitation.

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According to our research conducted in WP5 and the focus group with national stakeholders, "intermediaries" are important as the institutional channels such as the Public Employment Centre and the Flows Decree, which sets annual quotas for non-EU workers, are perceived as too slow and bureaucratic. As a matter of fact, employers consider these official channels ineffective. Because of these limitations, **employers increasingly rely on informal recruitment**, mainly personal networks and word of mouth. These channels are fast, but they often lead to irregular and grey labour practices.

A more recent and widespread phenomenon is the rise of **"landless cooperatives"**: private intermediaries that recruit and supply workers to farms. These cooperatives, often run by immigrants, recruit mostly asylum seekers from reception centres and **provide an all-in-one service**: recruitment, transport, protective equipment, mediation, and sometimes housing. Employers use them to avoid bureaucratic burdens and meet urgent labour needs. However, this system carries significant risks: cooperatives often operate with limited oversight and employers may underestimate the fact that they remain legally responsible for compliance with wages, contracts and safety standards. Alongside cooperatives, **temporary work agencies** also play a role in supplying seasonal labour. On the other hand, the presence of **informal intermediaries and gangmasters** continues, particularly in contexts where oversight is weak. These actors organise recruitment and logistics but expose workers to severe risks of exploitation. The outsourcing of labour supply reflects both employers' need for flexibility and the structural weaknesses of formal labour market institutions.

4.2 Business strategies of substitution and complementarity in food processing and gastronomy

Research on migrant workers in the food processing and gastronomy sectors is less developed and far-reaching - both in general terms and within the DignityFirm project - compared to the agricultural sector. Therefore, most of the analysis of business strategies in this sector can be based on the survey and, to a lesser extent, on the information provided by the focus group.

The survey data point to a pattern of overall **substitution** rather than complementarity between migrant workers and native workers, possibly except for very high-skilled or managerial positions. The occupational distribution shows migrants and natives performing fundamentally similar (medium to low-skilled) tasks, with migrants increasingly replacing natives in the same positions. The temporal dimension strengthens the substitution thesis. Ministry of Labour data shows that between 2014 and 2023, non-EU workers' share among new hires in cooking positions rose from 23% to 34%, and among kitchen assistants from 41% to 58%.

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Yet, the substitution pattern is clearest in **manual labour positions**. While 76.89% of companies employed natives in skilled manual work and 82.35% in unskilled manual work, 94.96% employed foreigners in unskilled manual positions and only 24.79% in skilled manual roles. However, this percentage rises to 43.68% in gastronomy. The survey then reveals that only around 3% of employers mentioned that foreigners have specific qualifications required for the job (5.94% in gastronomy, 2% in food processing), suggesting that migrants are not selected because of specialised skills.

Participants in the **focus group** also referred to different tasks performed by different groups of migrant workers, with foreigners from South America (particularly from Argentina and Peru) mainly employed as waiters/waitresses and bar staff tenders, and South-East Asian workers in lower positions. Moreover, they pointed to a system of misclassification, in which migrants "do chef work or cooking, but are classified at lower levels and appear to be dishwashers, when they are actually assisting the cook in every way or sometimes replacing them". This represents an extreme form of complementarity: migrants with similar or identical skills to natives are relegated to different formal positions due to a lack of recognition, language barriers, or exploitative employer choices. This creates a stratified labour market where natives, or migrants with a more stable legal status higher-classified positions, while migrants perform equivalent work under inferior classifications and conditions.

Both the survey data and the focus group provided elements that might suggest a pattern of **substitution between formal and informal migrant work**. On the one hand, the trend is difficult to grasp precisely because of the unlawfulness of informal jobs, which makes it unlikely that employers are willing to admit violations. On the other hand, the survey shows that 23.76% of gastronomy companies and 22% of food processing companies reported employees beginning work before all formalities were completed during peak seasons, and this might represent an indicator of informal employment practices. Moreover, representatives of a trade union participating in the focus group reported that, similarly to the agricultural sector, workers often face employment relationships where their contract is formally registered, but this does not prevent irregularities in gross salaries, contributions, unemployment benefits, and working hours. Similar conclusions have been suggested by a recent IOM analysis, which focused specifically on the restaurant sector (IOM, 2025). This represents what might be termed as "grey" or "under-declared" employment: a formal contract providing legal cover and minimum contributions, while the majority of actual work occurs informally, unregistered and unpaid according to legal standards.

Another feature of the trend of substitution between formal and informal migrant work is the one **related to migration status**. For those with precarious legal status, in order to obtain a form of protection (most likely, a national form of humanitarian protection, complementary to international protection) the formal contract component is crucial, even though it might

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also be accompanied by informal arrangements: the formal contract represents a proof of the existence of a job relationship, which is considered an important element to demonstrate migrants' integration into the host society. Pure informality (i.e. informal employment of irregular migrant workers), moreover, has been slowly decreasing in the last 20 years, as it has also been prevented through controls and enforcement: around 23% of the survey employers reported having been subjected to labour inspection controls.

As regard to automation and service outsourcing, insufficient data exists to adequately assess such dynamics in the provided sources. Neither the survey data nor the focus group extracts address automation, mechanisation, or technological substitution for labour. Unions and employers did not mention automation as a significant feature of the restaurant sector's transformation, nor analysed the issue of outsourcing employment. Differently from the agricultural sector, there are no formal actors mediating between business and restaurant owners and employees. The survey data also shows **limited current use of outsourcing mechanisms**, with only 7.17% of companies that employed foreigners through temporary work agencies. However, participants in the focus group noted that often migrant workers are replaced by members of the same community/country of origin through informal channels.

Finally, employers' associations have highlighted a pattern of increased substitution between native and migrant **entrepreneurs** in restaurants, at least in some cities: for instance, in Turin the percentage of non-EU owners in the restaurant business has reached 23-25%. This entrepreneurial dimension adds another layer to the substitution pattern for at least two reasons: first, migrants are not only replacing Italian workers but also, increasingly, Italian business owners; secondly, migrant entrepreneurs are more likely to employ migrant workers, either from their own community (i.e. kebab shops, Chinese restaurants) or from other countries of origin. However, it shall be noted that this trend might bear problematic implications for workers' rights. As a union representative noticed, "there is unfortunately a hierarchy even among the exploitation of migrant people. So I'm not surprised that the prevalence is workers from Pakistan or Bangladesh, because that, from what we have seen, represents today the new frontier of severe labour exploitation. And so maybe we have Chinese entrepreneurs who managed to open the restaurant, but who internally exploit foreign workers less equipped with tools than themselves". While not being systematic, informal employment might enable ethnic-based exploitation chains that trap the most vulnerable migrants.

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5. Employee's perspective: labour market vulnerabilities of workers due to informal employment and the importance of the regulatory framework

In all three sectors addressed by the employer survey, and particularly in agriculture and gastronomy, informal employment (qualified above as "grey" or "semi-formal" work) has various consequences for migrants. They often receive low wages, or at least low gross wages, and do not have access to social security benefits. Sometimes they are paid below the legal wage as negotiated by national collective contracts, or even when those wages are respected, they are not sufficient to grant adequate living conditions to migrants, because of the barriers to access housing services and social security.

Moreover, informal work means that employers can dismiss workers with virtually no penalty or withhold their wages. This increases both short-term survival risk and long-term economic insecurity. Another consequence of informal employment is risks to health and safety at work. Informal work often means no training, no protective equipment, long working hours in extreme conditions, and inadequate access to healthcare, leading to an increase in accidents, chronic diseases, and work-related injuries.

A widespread problem is the spatial and social isolation of workers. In agriculture, many migrant workers live in informal settlements or overcrowded accommodation near farms, leading to poor health, limited access to services, and weak local social networks that would otherwise help with finding work or legal advice. This geographical isolation makes it difficult to access formal employment channels. Several employers recognise this problem and are in favour of public measures such as reception centres for seasonal workers organised and financed by public authorities.

Workers in the hospitality, particularly in medium to big cities, also face the problem of finding housing. They are exposed to forms of exploitation by landlords and even by members of their community/country of origin, who speculate on the need to have access to apartments.

Another consequence of informal employment is the fear of being reported. Due to their undocumented status and informal employment, workers fear contact with authorities (police, labour inspectorate). This fear leads to fewer reports of abuse and a failure to take advantage of existing protective measures, which exacerbates exploitation. Even when they have permits to stay, such as the case of asylum seekers or holders of work permits, the immigration system constantly exposes them to uncertainty and vulnerability: for instance, in Turin, the process of renewing the permit to stay takes several months, during which migrants do not have a "real" permit to stay, and therefore some employers are not willing to extend their contracts.

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Moreover, the focus groups underlined that migrant workers in the agriculture and restaurant sectors often face **barriers in access to labour unions, formal training and skill development** (the employers emphasised "there's so much mobility it makes training impossible"), professional networks for job advancement, and protection against arbitrary dismissal. The combination of informal status, language difficulties, and concentration in informal settlements, back-of-house positions, or overcrowded houses with migrants in similar conditions creates profound isolation that reinforces labour market segmentation.

According to the participants in our focus group, although Italy has a comprehensive legal framework, with strong criminal law (Law 199/2016 + Art. 603-bis), administrative sanctions (Decree 109/2012), labour migration management (Decreto Flussi), and protective policies (National Plan), this legal framework cannot effectively counteract informal employment and other aspects of precariousness.

For employees, quotas are too low compared to actual labour demand, and for this reason, the necessary number of seasonal workers does not arrive, and often these workers arrive too late for the work they have to do. Enforcement is uneven across regions (Apulia, Calabria, and Sicily are the most affected). Migrants are often too afraid or dependent on employers to access protections.

According to focus group participants, the bureaucracy associated with entry flows is the main barrier to hiring migrant workers, with procedures that are slow and not fully operational. There are problems caused by embassies, particularly those in Casablanca and New Delhi, which accumulate visa applications with enormous delays, compromising seasonal hiring. Seasonal workers arrive in Italy too late, when the harvest seasons are over. Asylum seekers can be hired legally two months after submitting their asylum application. This is good news for employers, but the downside is that asylum seekers can become irregular migrants months or even years after entering Italy.

The Bossi-Fini Law creates a strong link between residence permits and employment contracts. Vulnerable and blackmailable foreign workers accept grey employment contracts, with fewer hours declared than those actually worked, in order to obtain a residence permit. There is a significant presence of workers from Pakistan and Bangladesh among asylum seekers, who often work in conditions of poor bargaining power until the international protection process is completed. In this regard, participants in the focus group advocated for residence permits based on territorial integration rather than employment alone, which would reduce migrants' dependence on any single employer and their tolerance for informal arrangements.

According to the participants in our focus group and also in the interviews in WP5, there are various possible regulatory frameworks that could address labour market vulnerabilities. The

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priorities concern: recruitment and intermediation; controls; wider reforms of the fiscal policies and minimum wage policies.

A priority is to create a legal mechanism to convert seasonal permits into longer-term work permits when a worker has a continuous work history. There should be fast conversion rules and a reduction in employer-only sponsorship. Stronger regulation of intermediation is also important. In the agricultural sector in particular, agricultural entrepreneurs said that greater control is needed over landless cooperatives that hire immigrant workers and then bring them to agricultural entrepreneurs. The latter are unable to check whether their workers have regular contracts with the cooperatives, whether they are paid what they are owed, and whether they have valid residence permits. A public list of landless cooperatives operating correctly in the market should be created. One priority is to license and supervise labour brokers and placement agencies and to improve criminal/administrative sanctions for unlicensed brokers. Another priority is to create a public registry of licensed recruiters and transparent fee rules.

Another priority pointed out by the stakeholders is to support robust **inspection** and integrated data systems. It's important to scale up the INL (National Labour Inspectorate) and inter-agency inspection capacity, with targeted joint inspections, supported by a national digital risk-based registry to flag farms/companies with irregularities.

A binding criterion in granting agricultural subsidies (CAP funds) should be compliance with labour standards. The Network of Quality Agricultural Work is a good practice but it is not attractive for farms. Joining the Network is almost just a 'label' without real benefits. Companies that join should have priority access to public funding (RDP, NRRP, tax incentives), bureaucratic simplification for members and preferential treatment in distribution (agreements with large-scale retail and wholesale markets). There should be constant monitoring of member companies, with cross-checks. It would require large-scale retailers and big buyers to source primarily from Network-certified farms and to strengthen the role of unions, associations, and agricultural cooperatives in the Network's governance. Currently, farmers without employees can no longer join the network, which is a problem because only big farms can participate.

Participants also emphasised **fiscal policy** as crucial for combating informality, and therefore the vulnerability of migrants. In the gastronomy in particular, many more checks should be organised to ensure that entrepreneurs issue tax receipts. This would prevent restaurateurs from paying their workers informally. While not addressed intensively, both employers and unions seemed to agree on the need for increased controls from labour inspectors, with regard to safety and occupational health, working hours, employment conditions.

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Another problem highlighted by all participants is the issue of **accommodation** for migrant workers. There are many bureaucratic problems to be resolved, such as speeding up the certification of suitability for housing for agricultural workers or promoting agreements between farms, bed and breakfasts and hostels. According to the focus group participants, there is a lack of clarity regarding responsibilities for housing policy in Italy, as it is shared among national, regional and local authorities. This creates additional difficulties with regard to funding and public policies aiming at promoting access to housing for foreigners. Some stakeholders also highlighted that housing policies should be funded much more than the actual situation.

Furthermore, according to some participants, the problem is that **wages** are too low. In the catering, the highest salaries are €1,800 gross, even for the highest positions. Foreign workers often prefer to receive a higher net salary, paid 'under the table', ignoring contributions, because it is very difficult to recover them. In this regard, unions also suggested a reform of the legislation on minimum wage, as a starting point for promoting policies aiming at increasing formal salaries. In fact, in Italy there is no regulation on a general minimum salary. Salaries are established in the national collective agreements signed between the Unions and representatives of the employers. Therefore, there is no minimum salary in the F2F sector.

Finally, as far as large-scale organised distribution is concerned, a national law is needed to stabilise the prices of agricultural products and to limit the total freedom of large-scale distribution at the expense of producers. In Italy there are laws to limit the power of large retailers in agri-food supply. The legislative Decree No. 198, 2021 introduced key protections: written contract requirements, a list of banned unfair practices, payment term rules, and more. A proposed bill aims to amend Decree 198/2021 to give greater weight to production costs when determining prices in agri-food contracts. The bill stipulates that, in contracts for the sale of agri-food products, the price must take into account production costs, including raw materials, energy, labor in the production areas, geographic location, and variability due to climatic events. This bill has not yet been approved. The Decree-Law No. 63, 2024 (DL 63/2024) strengthened producers' protection within the agri-food chain, addressing unfair practices, contract terms, and under-pricing. These laws introduced several tools to rebalance power between producers and distributors, such as a ban on payment delays, particularly for perishable goods, prohibition of short-notice order cancellations, restrictions or bans on below-cost sales and prohibition of double-auction practices. Despite this solid legal framework, employers' associations noted that enforcement remains inconsistent and penalties are sometimes too weak to deter abuse.

To sum up, focus group stakeholders, even though representing different interests, agreed that coordinated reforms are needed. They should address immigration law (delinking residence and integration from formal employment), labour law (statutory minimums,

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premium pay, contract stabilisation), fiscal policy (eliminate cash transactions), and enforcement (systematic inspection, severe penalties). Individual regulations in isolation will fail because employers and migrants face structural incentives to maintain informal arrangements - employers to reduce costs and maintain flexibility, migrants because semi-formal arrangements provide their only access to both legal status and survival income.

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Annex

Table 1. Focus group on agriculture.

PARTICIPANT	ROLE
1	Representative of the Ministry of Labour and Social Policies
2	Representative of the International Organization for Migration (IOM)
3	Researcher at Fondazione Placido Rizzotto
4	Representative of an employers' association (Coldiretti)

Table 2. Focus group on gastronomy/restaurants.

PARTICIPANT	ROLE
1	Representative of the Association of Employers in the touristic sector
2	Employer and representative of a civic platform for sustainable entrepreneurship
3	Representative of labour union in the touristic sector
4	Representative of labour union active in migration-related projects

Table 3. Focus group on gastronomy/restaurants.

PARTICIPANT	ROLE
1	Manager of a social restaurant in a cooperative system
2	Employer and manager of a foreign-led (Argentinian) restaurant
3	Manager of a foreign-led (Afghan) restaurant
4	Bartender of a foreign-led (Afghan) restaurant

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Deliverable information

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WP6 Country Report – Italy

Migrant Labour in the F2F Supply Chain in Italy: Employer Strategies and Policy Implications

ABOUT DignityFIRM

Towards becoming sustainable and resilient societies we must address the structural contradictions between our societies' exclusion of migrant workers and their substantive role in producing our food.

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