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BARMIG PROJECT

NATIONAL REPORT
HUNGARY

February 2022

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Bargaining for working conditions and social rights of migrant workers in Central East European countries (BARMIG)

National report Hungary

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Central European Labour Studies Institute (CELSI)

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This report was financed by European Commision Grant no. VS/2020/0119.

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Abbreviations

BKIK	Budapest Chamber of Commerce and Industry
ÉFÉDOSZ	Trade Union Federation of Workers in Construction, Wood and Construction Material Manufacturing
ÉTMOSZ	National Level Trade Union of Workers Designed for Life (*unofficial translation*)
ÉVOSZ	National Federation of Hungarian Building Contractors
FESZ	Independent Healthcare Workers Trade Union
KASZ	Trade Union of Commercial Employees
KDFSZ	Independent Trade Union of Retail Workers
KSH	Hungarian Central Statistical Office
LFS	Labour Force Survey
LIGA,	LIGA Trade Unions
MAGEOSZ	Hungarian National Association of Machinery and Power Engineering Industries
MAJOSZ	Association of Hungarian Vehicle Component Manufacturers
MASZSZ	Hungarian Trade Union Confederation
MGYOSZ	Confederation of Hungarian Employers and Industrialists
MOK	Hungarian Chamber of Medical Doctors
MOSZ	National Federation of Workers' Councils
MOSZ	Trade Union of Medical Doctors
MSZ	Hungarian Hospital Association
MSZ EDDSZ	Democratic Trade Union of Healthcare Workers
NFSZ	Hungarian National Employment Service
NGTT	National Economic and Social Council
OKSZ	Wholesale and Retail Federation
OSZSZ	Trade Union Federation of University Clinics
VASAS	Hungarian Metalworkers' Federation
VIMOSZ	Hungarian Hospitality Employers' Association
VISZ	Hungarian Trade Union of Catering and Tourism
VKF	Permanent Consultative Forum of the Private Sector and the Government
VOSZ	National Association of Entrepreneurs and Employers

Executive summary

Hungary has experienced an acute labour shortage from 2016, especially due to the outmigration of workers to labour markets in western EU states. The resulting labour shortage has been compensated increasingly by the employment of migrant workers from neighbouring non-EU countries, from Serbia and Ukraine in particular. The Bargaining for Working Conditions and Social Rights of Migrant Workers in Central East European Countries (BARMIG) project assesses the role of established industrial-relations institutions in addressing the effects of migration on changing labour markets. It also examines how trade unions and employer organisations in Czechia, Croatia, Estonia, Hungary, Slovakia and Poland are responding to these changes.

The reintroduction of a market economy in Hungary in the 1990s occurred alongside waves of unemployment. Since then, the main regulations governing the employment and labour-market integration of migrant workers who are third-country nationals has been protectionist, rigid and restrictive. Pressing labour shortages in 2016 resulted in new governmental decrees and rules that made seasonal employment available and offered a regulatory window facilitating the easier employment of third-country nationals, especially for citizens of Ukraine and Serbia. The restrictive regulation means that employment of third-country nationals is usually temporary and uneven: it is typical of seasonal work only, often via fixed-term employment contracts and intermediaries. The employers include the Hungarian government's strategic partners. The significance of temp-agency work in employing the much-needed migrant workers and 'inserting' them into the Hungarian economy increased massively over time, as these workers filled the gap in employer-requested flexibility, especially for seasonal workers. The restrictive and complicated nature of granting a work permit or residence permit gave temp agencies a comparative advantage, as they could specialise in and take on the massive amount of administrative paperwork, recruitment, etc., both relieving employers of this task and providing services to workers.

Hungary does not have a transparent economic and labour-market policy, or an adequate infrastructure to deal with the labour-market integration of third-country nationals, especially for non-Hungarian speakers. The lack of integration infrastructure reinforces a pattern of temporary, circular migration, with employment arrangements that fully depend on (the good will of) employers. Social partners have modest to low capacities for dealing with special groups of migrant workers and their integration into workplaces and the wider labour market. However, they have not been invited to help design economic policy, and they do not have sufficient involvement in regulation. As recent research and data on third-country migrant workers is insufficient, social partners have typically also not been informed about the problems that

migrant workers face, and the issue of migrant workers' integration has not been placed on the collective-bargaining agenda.

From 2016 onwards, at the national-level social-dialogue forum, the issue of migrant work featured twice. However, it was not discussed as a separate point, but first in relation to the management of labour shortages, and second in relation to regulatory changes facilitating the employment of third-country nationals, especially from Ukraine and Serbia. Sectoral social-dialogue committees exist, but these operate in only a few sectors, mostly as information-exchange forums. The problem of migrant workers' integration was not an issue considered at the meetings: problems were not gathered, systematically detected and discussed among union and employer representatives.

The capacities of national-level and sectoral-level social partners are modest (employer organisations) to low (trade unions). Typically, social partners have no staff specialised in dealing with migrant workers. They lack their own database, and at best are collecting and monitoring reports and gathering publicly available data. At the national level, employers' organisations are more proactive, proposing regulations and suggesting changes, while unions are reactive, evaluating the labour-market situation in the media, and (less often) in publications. What both parties have in common is a minimalist pragmatic approach, acknowledging the increased (and continual) presence of migrant workers in the Hungarian labour market. However, no specific strategies have been designed, especially not from trade unions. Most acutely, as a unionist from the construction sector stated, the unions lacked the capacity to even protect local workers, and thus the issue of the protection and integration of migrant workers felt like a massive challenge. Yet, in the construction sector no significant differences seemed to exist between contracting third-country migrant workers and Hungarian workers, especially since most Hungarian workers are also non-local workers, and issues related to accommodation and cost-sensitive contracting also feature. However, as concerns healthcare, third-country nationals seemed to have become relatively well-integrated, since many of them obtained their medical or nursing certification in Hungary. Sectoral trade unions in metals and retail aimed to develop a general strategy for improving working conditions and wages. Among employers in the hospitality and tourism sector, there was a special practice that dealt specifically with requests from Hungarian-speaking migrant workers, but a similar practice has not yet been developed for all third-country nationals. In the metals sector, the union offered services only to migrants who were union members, and they did not develop specially targeted services. Only the retail union considered dealing with migrant workers, if it were able to gain temporary funding to fulfil the capacities required.

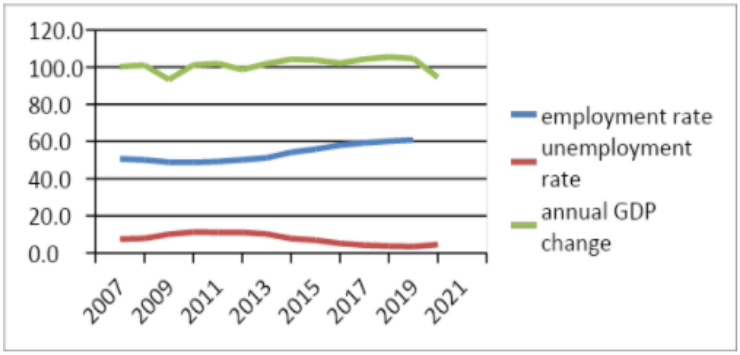
Introduction

Since 2016 the post-socialist EU member states have experienced acute labour shortages, especially due to the outmigration of workers to labour markets in western EU states, but also due to demographic constraints. The resulting labour shortage has increasingly been compensated for by employing migrant workers from neighbouring non-EU countries, especially from Serbia and Ukraine.

This report assesses constraints, opportunities and challenges for industrial-relations actors, which stem from the increased presence of migrant workers in four traditional sectors – healthcare, construction, hospitality and retail services and metal manufacturing, as well as services provided as part of the digitised economy (i.e., platform work) in Hungary. It also analyses how, and with what capacities, trade unions and employer organisations in Hungary respond to these changes and challenges. The labour-market integration of migrant workers from countries neighbouring the EU – particularly Ukraine and Serbia – is of particular concern to the research. The report also aims to map opportunities for trade unions and employer organisations to influence policy in the areas of migration policy, the protection and representation of migrant workers' interests, fair employment and equal rights and integration for migrant workers, as well as through collective bargaining.

The Hungarian economy was severely hit by the global recession, and it went through a period of recovery and modest growth between 2013 and 2019. The Covid-19 recession has entailed a lasting shock to the economy: the first three semesters of 2020 indicated a 5.5 per cent relative fall in GDP. Reaching a low during the global recession, over the following years the employment rate in Hungary for the 15–74 age group increased very significantly. Welfare cuts and workfarist government programmes, especially the public employment programme as well as the cuts in welfare subsidies (restrictions and limitations in unemployment benefit), seem to have contributed to this outcome. Unemployment decreased to a record low in 2019, before rebounding again in 2020, with an increase to 4.9 per cent in the second quarter. In the 2016–2019 period, average nominal wages also increased significantly at an annual rate of about ten per cent, but the Covid-19 recession stopped this trend.

Graph no.1. Labour market indicators and GDP change (year, %).
Source: KSH.



As earlier mentioned, the Hungarian economy has faced labour shortages since 2016, especially in the low-wage, labour-intensive sectors, and so it has relied increasingly on migrant workers' labour, especially from Ukraine and Serbia. Migrant workers from neighbouring countries were traditionally employed seasonally in labour-intensive sectors – especially in agriculture and construction, but since 2016 they have been employed increasingly in manufacturing and the service sector. During the first wave of the Covid-19 recession, migrant workers were among the first – if not the first – to lose their jobs. Since summer 2020, migrant workers have been employed once again in large numbers at many sites.

Chapter 1 of the report shows that the main regulation of employment and labour-market integration of migrant workers who are third-country nationals is protectionist, rigid and restrictive. Chapter 2 provides up-to-date statistical data with a critical discussion. The available administrative data indicate the precarious, temporary character of the migrant-worker presence in the labour market, which is in line with restrictive regulation. Besides providing information on relevant institutions guiding Hungarian industrial relations that deals with the employment of migrant workers, Chapter 3 gives an overview of research and secondary literature on migration and migrant workers' integration, while Chapter 4 analyses media reports on migrant workers in the 2016–2020 period. Chapter 5 and Chapter 6 describe the state of play in terms of social dialogue on national and collective bargaining at the sectoral levels. These chapters incorporate 18 in-depth interviews with trade-union representatives, employer-organisation representatives, experts, and migrant workers, and provide an analysis of social partners' answers to challenges related to the increased presence of migrant workers in selected sectors. The report concludes with policy recommendations.

I. Regulation

1. Employment rules and conditions

The conditions of employment of migrant workers from third countries are regulated in Law no 4. of 1991, On Fostering Employment and Unemployment, (*A foglalkoztatás elősegítéséről és a munkanélküliek ellátásáról szóló 1991. évi IV. Törvény*), on Law no 2., On Travel and Residence of Third-country Citizens (*A harmadik országbeli állampolgárok beutazásáról és tartózkodásáról szóló 2007. évi II. Törvény*), and the governmental decrees based on these acts, i.e., Decree 355/2007. (XII. 23.), Decree 445/2013. (XI. 28.), and modifications by the Governmental Decree 113/2016. (V. 30.)

In what is quite telling of its restrictive nature, the employment of foreign nationals was regulated in a law (no. 4/1991) that covered the employment opportunities of locals and assistance for the unemployed, and it was accepted during the labour-market shock during the system change. The law enacted a restrictive quota system, and foreigners could only be employed in labour-market segments for scarce professions, i.e., in skills not available on the national and county-level labour market(s), and such employment was to be regulated by decrees and official statements. The main rule was that a third-country citizen can be employed only with permission from the relevant bodies after assessing the labour market, while governmental decrees were to outline exceptions to the general rule. The (partial) exception to these restrictive policies was a set of rules regarding the Hungarian diaspora coming from the neighbouring countries. After the EU accession, third-country citizens' employment was regulated via residence and border-crossing permits, and thus both immigration and policing rules applied. Finally, governmental decrees added new administrative requirements and forms of employment for third-country nationals. Since 2009, EU and European Economic Area nationals and their spouses also do not require work permits; instead, employers only need to register them with the respective authorities.

The general rule is that third-country citizens could establish an employment relationship only after a work permit had been issued by the official body in charge of employment, or through a joint permit issued by the Immigration and Citizenship Office. In turn, a work permit could be obtained if an employer made an official declaration of a labour demand (*munkaerő bejelentés*), after which a labour-market assessment followed. If there were no Hungarian or EU citizens available for the job, the work permit was issued. As

the validity of employment relation was pegged to residence permit, the employment of third-country migrant workers could in general be established for a fixed-term period only.[1]

By 2016 it seems the official policy considered that educational and vocational institutions could respond effectively to a detected labour demand in the labour market. The system changed quite abruptly in late 2015 amid pressing labour shortages. Since then, the Decree 445/2013 has been greatly amended so that it now lists a large number of seasonal or atypical employment arrangements in which no work permit is required, but also lowered employers' administrative burdens. In line with the amendments, the Ministry for National Economy issues communiques each year related to the (simplified) employment of third-country nationals, providing a list of professions and their NACE (Nomenclature of Economic Activities) categorisations to which simplified administrative obligations and procedure apply. This increasingly long list included assembly-line operators and various professions in the metals industry, but also professions in the construction industry and services sector (restaurants and tourism).[2]

From July 2017 onwards, seasonal workers from Ukraine and Serbia were exempted and did not require a work permit for a 90-day-long period in many sectors of the economy, while those who intended to work longer could apply for a residence permit within the three-month period.[3] In these cases, the employer obligation only consists of registering the employment of third-country nationals.

In July 2021 the government issued a decree, (no. 407/2021.) – in force since September 2021 –that extended and simplified the employment of third-country nationals in Hungary during the Covid-19 emergency period (in place in Hungary) via temp agencies. The decree is noteworthy not only because the responsibility for the employment of third-country nationals in Hungary was transferred to the minister of foreign affairs and trade, but in the legal sense because its provisions apply as derogations to laws on employment, the issuing of temporary work permits etc. Finally, the decree defines and sets rules for

[1] The exception was for holders of the EU Blue Card, which was issued only in very few cases – for highly qualified workers, IT professionals, and managers of companies (in these cases a joint procedure for work and residence permit was initiated by the employer).

[2] For an updated list see https://net.jogtar.hu/getpdf?docid=A17K0281.NGM&targetdate=fffffff4&printTitle=NGM+k%C3%B6zlem%C3%A9ny&referer=http%3A//net.jogtar.hu/jr/gen/hjegy_doc.cgi%3Fdocid%3D00000001.TXT

[3] Interestingly, the three-month permit-free period of residence coincides with the legally defined length of probation period.

qualified employers who can employ third-country nationals: temporary work agencies that employ at least 500 workers annually, which are financially stable etc.

A final and increasingly important employment form in which third-country nationals are heavily involved is student work. Students enrolled in tertiary education, irrespective of their citizenship, can work up to 20 hours a week and an additional 60 days full time during the summer break. Student work is typically brokered via student cooperatives, in a very precarious arrangement that uses the advantages of paid social security for students and thus provides effectively cheaper labour, i.e., lower labour costs to employers (see for example Kun 2019).

2. Regulation of integration

Hungary, like most Eastern European countries, did not even sign (and thus did not ratify or apply) the European Convention on the Legal Status of Migrant Workers of the Council of Europe or the UN International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families. The Hungarian Basic Law of 2011 excludes foreigners from the right to social security and basic cultural rights, whereas specialised acts are harmonised with EU law and these rights are granted. Overall, in the application and harmonisation of EU law, the Hungarian legislator adopted only the required minimal standards in the legal protection of third-country citizens residing in the country. The only exception was the extension of the equal-treatment legislation of 2003, which is also applicable to non-EU citizens (Tóth 2018, 2013a). Another piece of legislation universally applicable to all foreigners is the 2012 Penal Code, with clauses on sanctioning illegal employment and the trafficking of foreigners, and the law on obtaining Hungarian citizenship (1993). Acts related to free movement were passed in 2007. These mostly concern EU citizens and their family members, and are restricted to the regulation of free entry and registration, while they do not regulate real access to offices and information in Hungary. However, the second law of 2007 applies to non-EU citizens, including migrant workers, where the central intention of the legislator is to police (*rendészet*) migrants and security. In practice it means that migrants enjoy less rights than the local population (Tóth 2013a, 247). Finally, since 1989 there is a set of institutions, regulations and public policies that led to preferential treatment, emigration or access to Hungary for members of the Hungarian diaspora. This process culminated in the aforementioned simplified regulations on naturalisation, which were passed in 2011: a proof of an ancestor born before 1919 with Hungarian citizenship and knowledge of Hungarian language are sufficient criteria for getting Hungarian citizenship. The contrast is especially stark as foreign citizens residing in Hungary for 10–12 years have to comply with strict monitoring of obligations, taxes etc. (Tóth 2013a, 248). The legislator does not deal with the social, cultural and economic integration of foreigners, including migrant workers, and stresses policing and security issues. The Ministry

of Interior is the prime governing body that deals with foreigners and migrant workers. This also means that foreigners (including migrant workers) have more sanctions and security clauses than rights and entitlements. With few exceptions, local-level government also did not organise social dialogue with foreign residents until 2012, while the local-level governments' space for manoeuvre has been limited from that period onwards because of the centralisation of the most important, integratory public spaces, such as public libraries. Finally, the 2011 Law on Civil Associations curtailed these organisations' spaces of activity for designing programmes for migrants, and special taxes were introduced as sanctions against organisations that "support migrants" and migration. Hungary has only general legal-protection bodies, and these have no specialised bodies or specialised procedures to deal with migrant-worker groups. For example, the labour inspectorates do not have specialised units to deal with migrant workers, and they typically do not speak 'third-country' languages (e.g., Fedyuk and Meszmann 2018).

The government treats labour migration as a marginal issue, mostly as a policing and security issue, and from an EU law perspective, it views it as a task that entails legal-harmonisation requirements (Tóth 2013a, 249). The government instructed the Ministry of Interior to draft the National Migration Strategy (the name is quite telling of the approach taken) – a strategic document on migration and refugees, as part of the EU programme requirements (Migrációs Stratégia 2013). This strategy was not re-evaluated publicly, and especially not after the 'migrant crisis' of 2016. No Hungarian-language courses are offered to migrant workers.

3. Nostrification and recognition of diplomas

In Hungary a system (nostrification) for the recognition of diplomas and vocational training exists. The start of the procedure requires Hungarian citizenship, proof of asylum-seeker status, or for other (third-country) nationals, a residence permit for work or family-reunion purposes. This service does not only have a fee but also includes rather expensive translation costs, which could easily total about half of the net monthly minimum wage. There are no available statistics on the number of third-country migrant workers with residence permits who submitted a nostrification request to the relevant Hungarian authorities. It seems that few of them do this, and so these nationals remain classified as low-skilled workers. The only exception is in healthcare. Here, relevant statistics for dentists, pharmacologists, medical doctors and nurses exist (ENKK 2019, 93).

4. Discrimination – equal treatment

As already mentioned, in the legislation only the rule of equal treatment is also universally applicable to third-country nationals (Tóth 2018, 2013a). Equal treatment has been implemented since 2004 in the spheres of work and employment too. Over its 16 active years, the body in charge of monitoring and implementation, the Equal Treatment Authority (*Egyenlő Bánásmód Hatóság*), reported on and won many cases related to gender and racial discrimination also in the workplace. A quick search did not show cases involving discrimination against migrant workers, which might be explained by migrant workers' lack of knowledge about its existence. Unfortunately, from 1 January 2021 the Equal Treatment Authority ceased operations and the ombudsperson will take over the tasks of this body.

5. Third-country nationals, illegal employment and naturalisation

The main body in charge of detecting illegal employment, including of third-country nationals, is the labour inspectorate. Over the last ten years, the inspectorate has functioned with limited personnel, and it has predominantly relied on information sessions, with a soft-prevention philosophy. While sanctions have decreased significantly since 2010, some sanctions against companies engaged in illegal or irregular employment patterns have increased again since 2018. More alarmingly, there are fewer inspections, and so fewer opportunities to uncover the growing share of irregularities, including those related to the illegal employment of third-country nationals. In an official 2016 report we find that the total number of inspected workers decreased over the years. Also, for the 2014–16 period, the number of illegally employed third-country nationals (i.e., without a work permit) increased both in relative and in absolute terms. Illegal employment of migrant workers typically occurs in small enterprises, in agriculture, construction, manufacturing, retail as well as in tourism and accommodation services (EMH 2016, 4). Labour inspectorates cooperate with the immigration and tax authorities, as well as with the police. The labour inspectorate only sanctions employers engaged in illegal employment practices. As it is not responsible for migrant workers, if a migrant worker is employed illegally, labour inspectors forward their case to the Immigration and Citizenship Office, which will enact separate sanctions against them even in cases of irregularities in employment. The sanctions may include deportation (EMH 2016, 2, Juhász et al. 2012, 41).

For migrant workers, obtaining Hungarian citizenship normally requires residence in Hungary for eight years, with regular proof of subsistence (housing, income). Citizenship may be gained after eight years and after passing a Hungarian-language test, as well as a test on the Hungarian constitution. During the eight-year period, the administrators' discretionary right is quite broad in judging residence and other permits, while screening the material status of foreigners is a crucial element (i.e., proof of housing and of

subsistence etc.), which by definition privileges the wealthier migrant groups (see e.g. Menedék 2014, Tóth 2013b).

II. Statistical data and their availability – migrant workers' presence and labour-market outcomes.

1. Main data and datasets

Data of Eurostat's Labour Force Survey (LFS) indicate that the number of non-Hungarian-born people employed in the labour market for the 2008–2019 period for the age group 15–64 stagnated between 2008 and 2014, but it has been rising since 2015. In terms of the relative number of foreign-born employees from third countries, they barely reached one per cent of all employed in 2019, while for the period between 2008 and 2018 their share averaged 0.6 per cent.

The employment rate of third-country foreign-born nationals was similar, and on average it was only slightly higher than that of the local population. The activity rate was, however, significantly higher – on average more than five per cent than that of the local born population. LFS provides data for unemployment among foreign-born third-country nationals only for 2011 and 2016. Whereas in 2011 the unemployment rate was similar to that of the local population (11.1 vs 11 per cent), in 2016 the unemployment rate of non-locals was 9.4 compared with 5.1 per cent of locals.

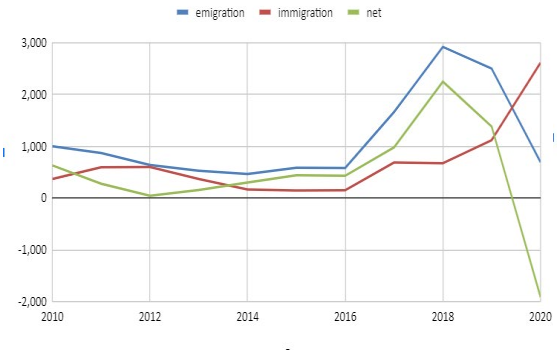
If citizenship is controlled for, the census data of the Hungarian Central statistical Office (KSH) for 2011 showed that there were 143,197 foreign citizens residing in Hungary, of whom 70,787 were employed (Lakatos 2015: 109–10). The census data can also be disaggregated by country of citizenship (e.g., for Ukraine and Serbia), especially for the forthcoming, postponed census of 2021. During the Covid-19 recession, in the second quarter of 2020, enterprises employing more than four persons reported 63,100 foreign citizens to the KSH among their employees, whereas the Labour Force Survey found only 45,700 foreign citizen-employees in the 15–74 age group (Kadlecsik and Váradi 2021, 4). The LFS data are incomplete as there are socially invisible workers and those who are economically active via small and micro enterprises, and those who reside in worker dormitories (ibid.). Furthermore, dual citizens or dual citizens without Hungarian residence are typically also not included in the sample.

2. Administrative data: recent labour migration from third countries

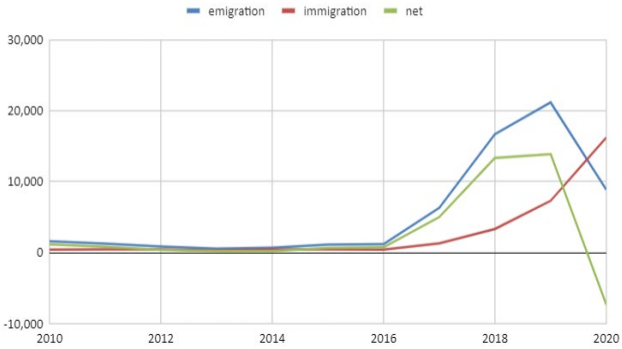
There are two kinds of administrative data that are good proxies for assessing the rising number of third-country national workers in the Hungarian labour market, especially workers coming from Serbia and Ukraine. The first is the total number of valid residence and settlement permits. This number includes not

only migrant workers with work permits but also groups who potentially feature in the labour market such as students.

Graph 2. Emigration and immigration of Serbian citizens as residence etc. permits issued and expired 2010-2020 (year, number). Source, KSH



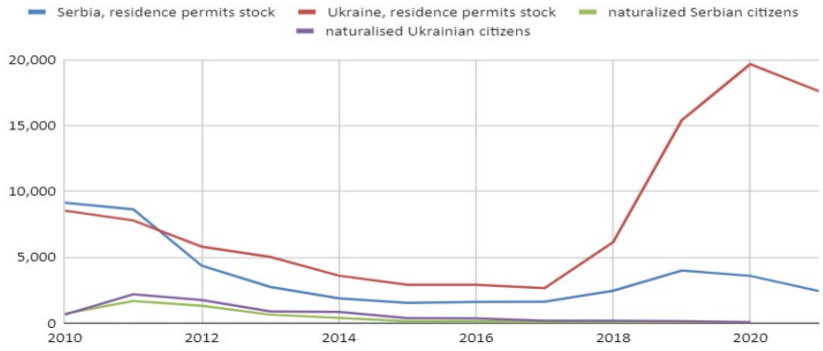
Graph 3. Emigration and immigration of Ukrainian citizens: residence etc. permits issued-expired, 2010-2020 (year, number). Source, KSH



We do not have disaggregated data but rather cumulative data on new and expired or annulled permits, which can be also disaggregated by country. Graphs 2 and 3 show disaggregated data for 'new' temporary residents ('emigration') and those temporary residents leaving Hungary ('immigration') from Serbia (Graph 2) and Ukraine (Graph 3). In both countries we see a massive increase of incoming migrants between 2017 and 2019, and a radical drop during the Covid recession in 2020. After the global financial crisis, leavers massively outnumbered those arriving only during the 2020 Covid-19 recession. Indeed, it seems that almost all who came between 2016 and 2019 left (at least temporarily) in 2020.

The annual stock of issued temporary-residence permits for Serbian and Ukrainian citizens, including work permits, but also temporary-residence permits issued for family unification reasons, settlement permits etc., are shown in Graph 4. The graph shows an exponential increase in the 2017–2020 period, and a decrease due to the Covid-19 crisis.

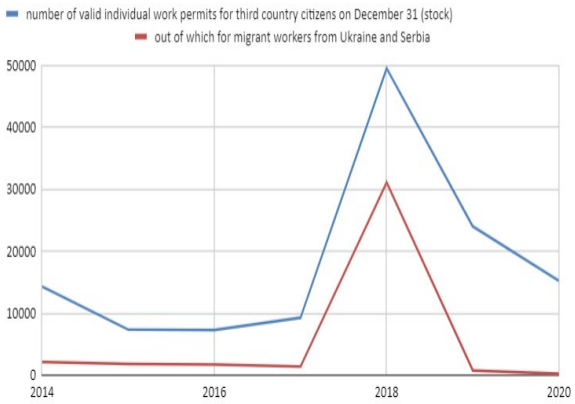
Graph 4. Annual stock of temporary residence and settlement permits for Ukrainian and Serbian citizens 2010-2020, (year, number). Source: KSH.



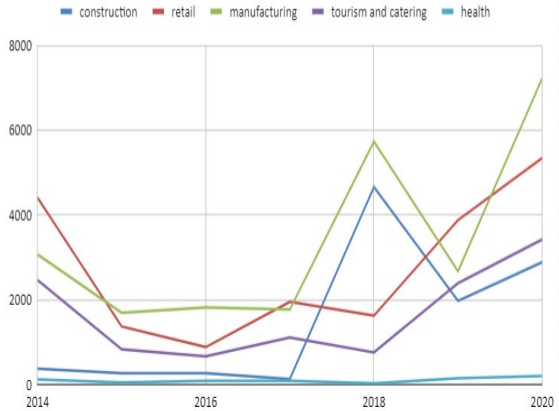
There are administrative data that log only those with work permits, or those Ukrainian and Serbian workers who gain temporary employment for a period not exceeding 90 days. The Hungarian National Employment Service (NFSZ) prepares annual reports on issued work permits and employer-registered migrant workers, which are based on administrative stock and flow data.

The following six graphs (5–10) show the administrative stock and flow data of work permits and employer registries in five selected economic sectors, for total and migrant workers from Ukraine and Serbia in the 2014–2020 period.

Graph 5. Number of valid individual work permits for third country citizens on December 31., stock (year, number). Source: NFSZ



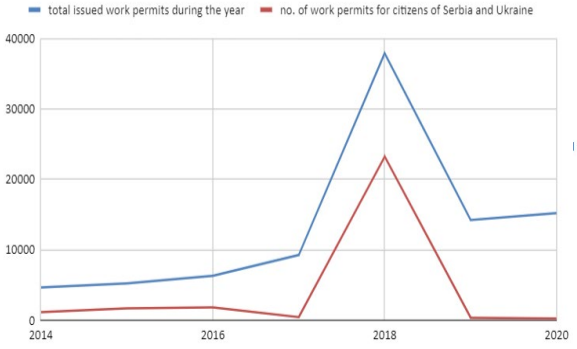
Graph 6. Number of valid work permits for third country nationals disaggregated by sectors on December 31, 2014-2020, stock (year, number). Source: NFSZ



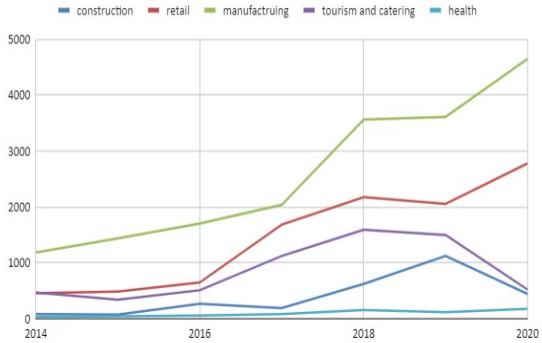
The stock data depicted in Graph 5 shows that there was a radical rise in valid work permits at the end of 2018, but the issued number of valid permits fell again by the end of 2019. The rise strongly correlates with the rise in valid work permits for Serbian and Ukrainian citizens, and it follows from the aforementioned changes in regulation. Graph 6 displays the disaggregated data across economic sectors. Clearly,

manufacturing and construction relied dominantly on migrant labour in 2018, and retail and tourism in 2019. The annual work permits for health and social care remained low, but they increased with the Covid-19 crisis.

Graph 7. Number of issued individual work permits for third country citizens, 2014-2020, flow (year, number). Source: NFSZ

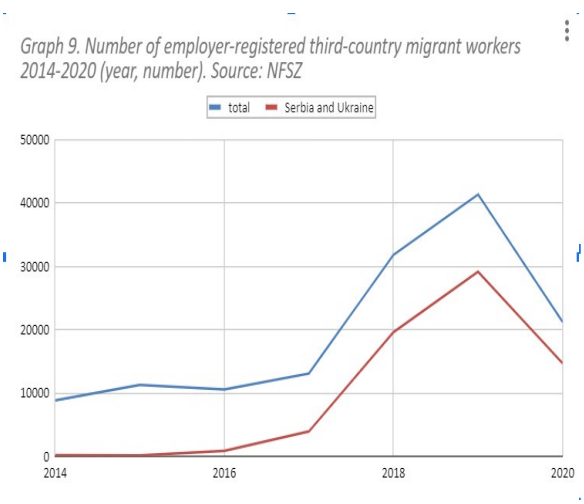


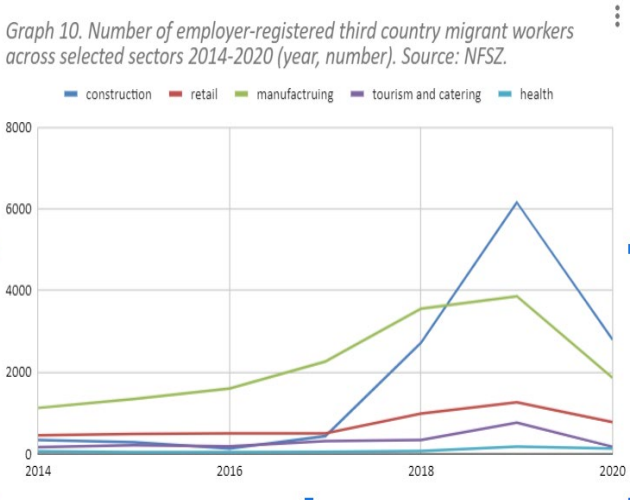
Graph 8. Number of issued work permits for third country citizens disaggregated by sectors, flow (year, number) Source: NFSZ



Graph 7 and Graph 8 show the flow data, i.e., the number of issued work permits during each year between 2014 and 2020. Compared with the stock data, we see here the dynamics of issued permits by countries and sectors. Whereas the data by countries are less surprising, the low number of issued permits in construction seems illogical. An explanation is that sectoral data do not contain permits issued without an official survey of labour-market needs *('munkaerőpiaci vizsgálat nélkül kiadott engedélyek')*. Two sectors have significantly expanded further in employing migrant workers, including during 2020: manufacturing and retail. Valid work permits issued for third-country nationals at the end of the year continued to rise almost continually during the 2016–2020 period in one sector alone: retail, while in the case of manufacturing there was a downturn in 2019 and a rebound to record-high levels in 2020.

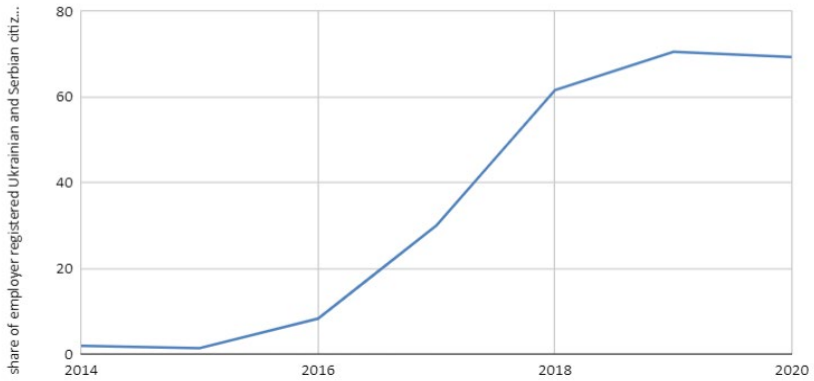
A comparison of stock and flow data charts (i.e., Graph 5 and Graph 7, and Graph 6 and Graph 8 respectively) indicate the limited duration of permits, which typically seem to last for one year at most.





Finally, Graph 9 and Graph 10 show the number of employer-registered foreign nationals over the year, given as the total from selected countries and across sectors, as in several of the earlier graphs. These numbers include EU+ citizens, and citizens of Ukraine and Serbia, who have a special status since June 2017 for employment not exceeding 90 days in sectors with acute labour shortages. Employer registration is required for all foreign nationals who do not need a work permit. Since 2017 there has been a massive rise in construction, and more recently, in manufacturing, while there was a decline of around 50 per cent in both cases due to the Covid impact in 2020. Serbian and Ukrainian seasonal employees contributed to this peak in numbers, as their share climbed to 30 per cent in 2017, 60 per cent in 2018 and remained at about 70 per cent in both 2019 and 2020. As indicated in Graph 11, we can clearly see a significant rise in registration in 2018 and 2019 for Ukrainian and Serbian citizens. This overlaps with Hungarian labour-market liberalisation for workers from these two countries (starting from July 2017).

Graph 11. Share of employer-registered Ukrainian and Serbian citizen-workers among all EU+ workers 2014-2020 (year, %). Source: NFSZ.



The administrative data suggest that the majority of third-country nationals took up unskilled jobs that required short periods of training (cf. Bakó and Lakatos 2020).

In the healthcare sector, the Organisation for Economic Co-operation and Development (OECD) has information on the annual stock and flow of workers born in different countries, including Serbia and Ukraine. From 2009 onwards, the Hungarian Ministry of Human Resources has published information on workers in healthcare, including doctors, nurses, dentists and pharmacists. These data also have a section on workers who nostrified the diplomas that they obtained abroad. In each year from 2011 to 2018, around eight per cent of all active medical doctors gained their diplomas abroad. Interestingly, the share and number of foreign-born medical doctors is significantly higher, reaching a high of 13.2 per cent, a share that has almost doubled since 2011 when it was 6.85 per cent (ENKK 2019, 97, 99).

3. Discussion

The census data showed that there are more foreign-born citizens residing in Hungary than there are according to the LFS. Lakatos (2015), and Kadlecsik and Váradi (2021) thus pointed out that the LFS underestimates the number of foreign-born citizens in the country. A further problem was that many foreign-born populations seem to be present seasonally or commute from border regions, and these are then not registered in census data (Lakatos 2015). An additional problem with the LFS was that the number of surveyed foreign-born population members without Hungarian citizenship was too low to make an appropriate judgement (Hárs 2012).

The fundamental question remains *who a migrant worker is*. This constitutes a major problem also for statistics (Hárs 2003). Hárs (2013) suggests eliminating from the dataset all presumably Hungarian-

speaking new citizens from neighbouring countries, leaving only those in the sample who do not have Hungarian citizenship. This assessment is legitimate, especially in its insistence on elucidating and problematising the special status of new Hungarian citizens (mostly with ethnic Hungarian roots) on the labour market. From the empirical research we know that many new Hungarian citizens of working age form a significant active labour pool e.g., in manufacturing (Meszmann 2018a), and it was Hungarian citizenship that originally granted them access to the labour market. Nevertheless, naturalised Hungarian citizens from Serbia and Ukraine should not be excluded from the sample.

To address these problems, and better assess the number of foreign-born citizens as well as migrants in the country, scholars used a combination of these data (Kincses 2020), or they combined local, representative survey research on migrants in Hungary with LFS data but only for the period until 2016 (Hárs 2012, see section II.). Experts also mentioned that since 2016 researchers dealing with migration have not had access to good data (EX03HU05032021, EX02HU03022021).

Migration is also a politically highly sensitive topic – both due to significant emigration (population loss) and the government's hard-line stance against refugee migration (EX03HU05032021, EX02HU03022021, EX01HU14012021). Moreover, demography is a sensitive issue for the current government, and it has an interest to keeping the population size, but also the labour-market participation numbers, as high as possible (EX02HU03022021).

There are also massive methodological problems with statistical data on the labour-market position of foreigners, starting with the problem of there being no apt category in Hungarian statistics that can grasp a migration relationship that has to do with employment or labour-market position (EX02HU03022021). The category of foreign-born employees is not meaningful in the Hungarian context, mostly because the most significant population coming from abroad to the Hungarian labour market, i.e., the Hungarian-speaking population from neighbouring countries, features as a group of both naturalised emigrants and labour-market participants. The number is highly significant and distorts statistical assessments, while the labour-market position of (potential) employees from this group has been changing over the decades, and continues to change. According to the same expert, there are also doubts over whether the data gathered (*adatfelvétel*) is adequately reliable. This comes to the fore in the case of likely missing numbers in the case of non-Hungarian speakers (especially Ukrainian and Serbian and other third-country nationals), including other temporary, circular migrants, as well as the approximately 20,000 non-EU nationals who bought Hungarian state bonds in exchange for settlement permits. Acute problems stem from the fact that especially non-Hungarian speakers, seasonal labour migrants, or both, and indeed all those with an insecure legal status are more prone to hide from labour-force surveys, as well as from surveys organised by the central statistical

office. At the same time, surveyors do not seem to have any incentives to go after missing respondents or to seek adequate replacements. In other cases, such as registers of seasonal workers, the question emerges of whether one employee is counted several times due to more than one licence or registration being made per annum.

When discussing labour-market integration, the regional patterns within Hungary seem to diverge within the country, based on two functions related to employment opportunities: first, the amount of incoming FDI and second, emigration to the region; however, systematic research has not been completed yet (EX03HU05032021).

III. Secondary literature related to labour migration in Hungary

This review is based on a systematic search of the relevant Hungarian scholarly literature from 1990 to the present. It consists of 1) a keyword search in the Arcanum electronic database for the term 'migrant worker', 2) the same keyword search in the indexes of four of the main Hungarian scientific journals,[4] 3) a keyword search for 'migration' in the Hungarian Academy of Sciences' article depository,[5] and 4) a review of scholarly books, mostly yielding edited volumes on immigration, migrant workers and labour-market integration.

1. Studies of (local) migration specialists:

Since 1989, a characteristic feature of immigration in Hungary is its ethnic make-up. Immigrants did not only come mostly from four neighbouring countries (Romania, Ukraine, Serbia and Slovakia), but by the early 2000s about two-thirds of immigrants were Hungarian speakers (Gödri 2013, 263). In other words, immigration waves have been dominated by the migratory movements of ethnic Hungarians from neighbouring countries (Hárs 1992, 2010; Gödri and Tóth 2005; Melegh 2011a; Feihschmidt & Zakariás 2010; Kincses 2009, Kincses 2019). While in the 1990s, political crises were the main motives for migration, around the 2000s economic motivations started to prevail, due to a lack of prospects in the migrants' home countries, high unemployment etc. Migration specialists, who relied especially on census data, concluded that Hungary was taking up an *intermediary position* in global migration with small-distance international migration (e.g., Kincses 2010, 208), while Melegh and Sárosi termed it a concentrated

[4] *Szociológiai szemle, Közgazdasági szemle, Demográfia, Munkaügyi Szemle*

[5] http://real.mtak.hu/view/subjects/JU.html

'regional migratory space' (2015, 241). The latter term is apt in highlighting cultural capital, linguistic patterns and the efficient use of social networks, all of which has played a significant role in individual or group decisions to emigrate. The term also indicates the significant but decreasing share of the migration's ethnic character (see also Gödri 2013; Juhász et al. 2012). Overall, for the 1990–2010 period, Melegh and Sárosi (2015) stated that Hungarian migration mirrored global migratory flows, in which both the emigration and immigration stock increased over the years. The rising number of immigrants could not compensate by itself for the emigration and the continual decline in the total population, and it could compensate less and less for the unfavourable demographic and social or skill-loss trends as well. Emigration especially intensified after the EU accession, and again after the global recession of 2008.

Apart from wage differentials and economic prospects, in his work Kincses (2020) highlighted territorial patterns of migration. Namely, microregions in neighbouring countries, typically those with a significant ethnic Hungarian population, provided a territorial pool from which population flows could originate. In turn, besides the capital of Budapest and the central Pest County, the regions close to the Serbian, Ukrainian and Romanian borders had the highest share of registered immigrant populations, especially from the same bordering countries (Kincses 2010, 2020; also Gödri et al. 2014, 28, Gödri 2011). Over the last decade, the share of immigrants from neighbouring countries has been decreasing. In 2011 only 40 per cent of migrants were from neighbouring countries, compared to about 70 per cent in the early 2000s (Gödri et al. 2014, 27; Kincses 2019; Kincses 2020). The share of unsettled, unregistered, or seasonal migrants with multiple registration sites has been relatively little analysed and documented (for an exception see: Illés and Kincses 2009). Kincses (2010) also demonstrated a correlation between distance and educational attainment: the larger the migration distance the higher the educational level (see also Hárs 2016, 30). This correlation is not valid since the 2010s as less-educated migrants have also been arriving from different continents to take on low-pay jobs (Kincses 2019). Since the 2010s, the rule has been also that distance from the migrants' country of origin negatively correlated with their age – meaning that a relatively older population arrive from neighbouring countries (Kincses 2019, 75).[6]

[6] For disaggregated data on educational attainment by regions see Kincses (2019: 75) Asian migrants in services work via family businesses (Hárs 2016: 30) The foreign-born population is also aging and increasingly older population arrived in the newer waves.

Melegh and Sárosi (2015) pointed out that immigrants predominantly had lower education levels, especially those from Ukraine and Romania, compared with those leaving Hungary, who had better educational attainment (Hárs 2012). However, the educational attainment of foreign-born people was higher than that of locals, especially in the case of emigrants from some countries (esp. Ukraine, Serbia, Vietnam, Slovakia, African countries), which might give them a better labour-market position.

2. Economic-sectoral assessment of migrant-worker employment

The literature dealing with migrant workers in Hungary has typically not had a sectoral focus. From a few representative survey-based studies we know that foreign-born employees have a greater presence in some sectors of the labour market and economy (Hárs 1992; Gödri and Tóth 2005; Juhász et al. 2012, 60). Most recently, Juhász pointed out that migrant workers were overrepresented in construction (10.4 per cent of foreign-born respondents vs. 5.7 per cent of local ones), but also catering and tourism (10.2 per cent vs. 4.1 per cent), other services (20.3 per cent vs. 1.2 per cent) and retail (17.3 per cent vs. 13.2 per cent), but with a similar participation rate in healthcare (7.4 per cent vs. 7.3 per cent). Like the local population, in construction and agriculture typically males were employed, while in healthcare and other services there were more female migrant workers (Juhász et al. 2012, 66).

The systematic, in-depth research of Sík (1999, 2006) brought to the fore patterns of informal bargaining and labour contracting in public space for construction workers in the Budapest metropolitan area, which involved Hungarian-speaking migrant workers from Transylvania. Similarly, Bertalan showed some personal networks and patterns behind work migration processes (Bertalan, 1997). More recently, Juhász et al. (2010), Lengerné Rédei (2011), Pakurár et al. (2012), and Koltai and Sík (2015) offered insights into the employment of Ukrainian migrant workers in the border regions. Workers from Ukraine were typically employed seasonally and cyclically, almost exclusively in blue-collar, low-paid jobs or on short-term contracts in construction and agriculture. Recruitment was highly personal and informal, and the percentage of undeclared workers from Ukraine was estimated at 40–45 per cent, with workers typically hired informally in small groups by small enterprises (Juhász et al. 2010; Juhász et al. 2012, 64). These labour-intensive small enterprises often provided poorer working conditions, employment below minimum wage, and extended, flexible working hours (Juhász et al. 2010, 9; Juhász et al. 2012, 64, 95, 97, see also Bisztrai et al. 2020). Hamar (2015) assessed the patterns of and changes in the employment of Romanian and Ukrainian seasonal agricultural workers, which may exhibit similarities with construction too. A major pattern was short-term, simplified employment and occasional work arrangements with few tasks and low wages. This pattern gained ground in situations of increasing labour shortages, most recently after the EU accession of Romania in 2007 (Hamar 2015, 34). Employer-farmers, the Romanian worker recruiter-organisers and workers themselves formed increasingly different, and informal networks of varying fragility.

Until recently, in research on the metals industry and manufacturing there was only very sporadic mention of migrant workers (e.g., Hárs 1992; Jánky 1996). Since 2016, migrant workers especially from Ukraine and Serbia, but also from Romania and third countries, have been employed in electronics and automotive

multinational companies and by those companies' local suppliers in many industrial Hungarian towns (Fedyuk and Meszmann 2018; Meszmann and Fedyuk 2019, 2020). Non-local workers in these plants have typically been employed via temporary work agencies, in triangular employment relationships. Most interestingly, while many Ukrainian and Serbian temporary workers enjoyed short-term benefits (partly or fully subsidised housing and travel home), their overall employment and social integration was highly precarious.

There are no recent studies outlining the employment of migrant workers in retail. Until the mid-1990s, especially in the border city of Szeged, and less so in Budapest, many citizens of Yugoslavia established small companies, mostly in retail (Szónokyné Ancsin 1997). Most likely, this concentration has not lasted to the present day. Migrant entrepreneurs and workers from China and Vietnam, but also from the Middle East, are now overrepresented in these sectors (see e.g., Juhász et al. 2012; Örkény and Székelyi 2010).

In healthcare, a massive and persistent immigration was detected, more specifically a high intensity of young physicians immigrating as a permanent "sticky" trend (Hárs and Simon 2017), and foreign-born citizen professionals from neighbouring countries who seemed to fill positions increasingly. Eke et al. (2011) assessed the proportion of foreign-born people present among health professionals. In this category, Hungarian speakers from neighbouring countries seem to constitute by far the largest group of immigrant health professionals, but their share has been decreasing over the years, and especially since the mid-2000s (Eke et al. 2011, 373). In 2008, the percentage of foreign-born doctors was 3.6 per cent, while nurses made up 1.3 per cent of the total stock for the two categories (Ibid.). For all groups, immigrant health professionals were relatively younger and included a higher proportion of males. Many are believed to have taken up only transitory jobs in Hungary before moving on to other EU countries after some time (Eke et al. 2011, 373–5). More recently, Pikó (2015) described the case of Transylvanian medical students, and their attitudes and plans for migration, including to Hungary. In the latter case, social networks and language seem to be the most important factors in decisions to take up jobs in Hungary.

3. Labour-market integration of migrant workers

As outlined in Section II.1, LFS portrays a rather favourable picture of the labour-market integration of the foreign-born population in Hungary (see also Göncz et al. 2012). There are several caveats to LFS that the scholarship on immigrants' labour-market integration has addressed. While there are no recent studies,[7] in

[7] In recent years, there has been more scholarly focus on Hungarian emigration (e.g. Blaskó and Gödri 2014, Hárs and Simon 2017). A parallel development was the beneficial naturalization of many foreign born, especially

the 2000s there were several studies based on large-n surveys conducted among immigrants, or foreign-born populations living in Hungary (Gödri and Tóth 2005; Örkény and Székelyi 2010; Juhász et al. 2012; Göncz et al. 2012; Huddleston–Tjaden 2012).

Targeting mostly Hungarian-speaking immigrants, Gödri and Tóth (2005) examined the integration of migrants, including their integration into the labour market (132–55). One starting point that they stressed was these foreign-born populations' higher age and education levels. They considered these two factors when explaining the significantly higher labour-market participation of immigrants in 2001–2 compared with locals, and their favourable labour-market integration. Moreover, from the perspective of the distribution of the employed by occupational groups, economically active immigrants showed similar patterns of positioning in the employment hierarchy, including a beneficial percentage (share) among the intellectual professions. From the perspective of the position of migrant workers in the labour market before immigration to Hungary, immigration meant a loss in occupational position for many of them, i.e., downward mobility. Especially large losses were recorded in the case of skilled vocational workers, who went from a share of 35 per cent to one of 26 per cent in the same occupational group, a difference that translated into a significant rise in percentage among unskilled occupations in Hungary (Gödri and Tóth 2005, 140). In terms of labour-market mobility, Gödri and Tóth observed altogether both downward and upward occupational mobility among immigrants, but a higher share of immigrants experienced downward mobility (Ibid. 145). In total, about a quarter of immigrants was found to be employed below their qualification level. Those who had finished their studies already in Hungary found more beneficial jobs in line with their skills (Gödri and Tóth 2005, 142). Among the various country groups, these authors found that the highest share of highly educated and white-collar workers came from former Yugoslavia, while of those from Ukraine and Romania the relative majority was skilled vocational workers, who in Hungary made up the most significant cohort of low-skilled workers. Among the non-Hungarian speakers, immigrants from Vietnam and China in particular only participated sporadically in the primary labour market (i.e., not having an employment relationship), but they either owned their own businesses or worked as family members in these. Gödri and Tóth (2005) were among the first to highlight that Hungarian-speaking immigrants found jobs immediately or relatively quickly, since they relied on informal acquaintance networks, as well as friends and family-member support. In contrast, very few respondents judged support for integration from official institutions as significant, irrespective of whether they spoke Hungarian (Gödri and Tóth 2005, 149).

Hungarian speakers. This process has peaked since 2011, and it also received some scholarly attention, but not from the perspective of work and labour market integration.

In a large-n survey conducted in 2009, Örkény and Székelyi (2010) examined patterns of integration for six distinct migrant groups: Hungarian speakers from Ukraine, as well as Ukrainian, Arab, Chinese, Vietnamese and Turkish migrants. They also found that although the activity and employment rates were quite high in all migrant groups, only the first two groups participated significantly in the labour market with formal employment. Members of the other groups were more likely to run small enterprises or be workers in family businesses. About a third of all respondents reported having experienced discrimination, out of which a significant proportion of negative experiences came at work or during the job search (Örkény and Székelyi 2013, 72–73).

The Immigrant Citizens Survey of 2011 found that the bulk of foreign-born, economically active people in the city of Budapest were working in the private sector or were self-employed. The study found that without obtaining Hungarian citizenship, various third-country nationals had *both* high activity and high inactivity rates, varying from a low of 32 per cent active Ukrainians to 60 per cent of Vietnamese. The quality of employment for the economically active showed that among Serbians and Ukrainians, between 70–80 per cent were in formal employment, but most Chinese and Vietnamese migrants had self-employed or entrepreneurial status. Altogether, 40 per cent of the foreign-born population of Budapest reported problems in finding a job, and about every fifth respondent indicated that they were overqualified for the job (Huddleston and Tjaden 2012, 24).

In a complex study, combining surveys and interviews with both migrants and experts, Juhász et al. (2012) formulated critical findings related to immigrant integration. In relation to job satisfaction, they found that two-thirds reported that their jobs corresponded only partly or not at all with their expectations (2012, 58). Many workers' vocational degrees were not recognised (Juhász et al. 2012, 81); moreover, finding and getting these jobs depended on informal networks (Juhász et al. 2012, 52, 54). Such a situation indicated high inequalities and a dependency on employers. The authors found that experts and members of interest-representative organisations also considered cost sensitivity, i.e., the opportunity to employ migrant workers for low-paying jobs – a very important reason for the employment of migrant workers (Juhász et al. 2012, 38). The wages reported by respondents were somewhat lower than the official average wage in Hungary by about 5 per cent, which was probably due to the difference in migrants' positions in the sectoral and occupational employment structure. Ukrainian respondents and those from the former Yugoslavia reported quite low average wages. Especially in low-wage, labour-intensive, cost-sensitive sectors, many immigrant workers had no social security or tax cards (ibid.: 90–91), while among workers from Ukraine, 40 per cent did not have these. Even where immigrants had a health card, they were on average much less likely than Hungarian citizens to turn to state healthcare facilities – almost five times less (Ibid. 93). Finally, Juhász et al. as well as the entrepreneurs they surveyed estimated that a very high share of workers from

Ukraine were unregistered – between 40 and 45 per cent of the group (ibid. 74). They correctly highlighted that these were also the workers who were the most vulnerable to economic shocks, i.e., those at risk of losing their jobs without compensation or entitlements to social-security benefits (Juhász et al. 2012, 75–76).

Most relevantly in terms of the labour-market integration of migrants, Ágnes Hárs attempted to combine LFS and some of the above-mentioned survey data in assessing the integration of migrant workers from third countries. Non-EU citizens hired with employment permits had significantly lower educational levels, but the LFS survey had an insufficient sample size for this subsample. After eliminating all foreign-born people who had gained citizenship from the sample, Hárs found that the labour-market integration of the non-EU foreign-born population without citizenship varied from group to group. After disaggregating by countries of origin, sex and age groups, the total picture that emerged was significantly less positive than for all foreign-born people. Most importantly, employment levels among the cohort aged 25–54 among the third-country national (TCN) population was found to be below the employment level for locals, especially for women. Moreover, third-country nationals were found to fill jobs in the lower segments of the labour market, which sometimes did not correspond to their typically higher educational levels. Among third-country citizens, Ukrainian citizens were the most numerous category of foreigner with work permits, but they were also more likely to fill unskilled jobs (Hárs 2010, 46, 47). In turn, relatively well-educated Vietnamese and Chinese migrants took up atypical, informal jobs that also required lower education. The proportion of atypical, occasional jobs was also higher in the non-naturalised migrant population, which might then also indicate a lower integration of third-country migrants into the Hungarian labour market (Hárs 2013, 56). A similar result was found by Gödri (2016, 2017), who also stressed the heterogeneity of the labour-market integrations of different migrant groups when also controlling for indicators related to self-employment and overqualification.

Social integration is related to membership in associations and other organisations, including those related to the labour market. Apart from established friendships, immigrants or foreign-born populations seemed to participate less in intermediary, civil or cultural organisations. Gödri and Tóth found that only 13.4 per cent of respondents were members of political, craft-based, cultural, civil, or other similar associations (2005, 162). Almost ten years later, Göncz et al. (2012) did not find a significant difference in membership in social organisations among locals and migrants (Göncz et al. 2012, 16), but all other surveys indicated significant deficits. Juhász et al. found that out of 403 respondents, only around one in eight mentioned an association that could help protect their interests, or to which they could turn in case of need; only three mentioned trade unions (2012, 107). The Immigrant Citizens Survey found that slightly more than a quarter knew about such an organisation, but only 4.5 per cent of those surveyed was a member of one (Huddleston

and Tjaden, 2012, 46). Finally, Kováts found that organisations that deal with migrants differed in size and character, but cultural and charity organisations prevailed and very few had lobby or interest-representative functions (2013, 36).

One issue that did not help with migrant integration into labour markets was the negative, xenophobic attitudes of the receiving population (Juhász 2012 et al., 103, 104). Local respondents supported only the immigration of Hungarian speakers from neighbouring countries, and either resisted or opposed others. Xenophobic attitudes were at very high levels even before 2010, but they peaked especially with the migration crisis of 2015 (for representative surveys Sík 2015, for local micropolitics see Feihschmidt 2016; Borbély 2015; Messing and Sárvári 2019). Borbély's (2015) anthropological assessment of how local Hungarian farmer-employers transposed discursive practices and attributes onto 'Ukrainian' 'alien' guestworkers in a small village near the Ukrainian border is particularly interesting; these were discourses that had earlier been used towards local 'bad Gypsies' (Roma).

Qualitative in-depth studies cast further shadows on the successful labour-market integration of immigrants. An analysis of the stories of immigrant women regarding their integration processes showed that interviewees experienced a loss in status in the first years of their immigration to Hungary. This loss was in most cases successfully overcome, albeit at a cost of great efforts (Melegh et al. 2010, Melegh 2011b). There are also concrete policy-related materials (see for example Szakpolitikai ajánlás 2014) that especially target migrants' integration in the capital city and in other cities: these materials are comparatively old, but still relevant. They indicate that there is knowledge from earlier research and activities, but this stopped rather abruptly after 2016.

Altogether, the up-to-date literature on labour-market related migration in Hungary is scarce, especially after 2016. There is no migration institute as such in Hungary, and no institutes made the topic part of their core profile. No significant funds have been allocated for research purposes on this topic, especially since 2015 (EX02HU03022021).

4. The role of industrial relations and social dialogue related to migrant work

With the partial exception of a policy paper that deals with migrant workers in manufacturing (Meszmann and Fedyuk 2020), there are no studies that assess trade-union positioning related to migrant workers. Traditionally, unions were not present in those small and micro enterprises where the incidence of precarious employment, illegal or grey employment has been high. However, unions have also shown little

interest in focusing on migrant workers in their daily activities (Juhász et al. 2012, 109; Meszmann 2016). Juhász et al. (2012, 41) found that migrant workers' contribution to the economy was perceived most positively among experts and state administrators and most negatively by entrepreneurs and employer and employee representatives. Even after 2016, with the exponential rise in migrant workers, unions did not seem to specifically target migrant workers with specialised services or develop agendas to protect or represent special needs and interests (Meszmann and Fedyuk 2020). The problem of informing and protecting migrant workers was typically perceived in terms of the problem of Hungarian emigrant workers in Western Europe, and the sponsored international projects of confederations (Liga, MASZSZ) and sectoral unions (Vasas) testify to this. A panicked, if not racist and xenophobic attitude from some confederations (MASZSZ 2018: 6) or sectoral unions was more problematic, as in retail (KDFSZ 2018) attitudes towards migrant workers in Hungary.

In the absence of social-dialogue bodies at both the national and sectoral levels, there have been no mechanisms to regulate the labour market, e.g., via policies that encourage the integration of migrant workers.

There is no available literature on collective bargaining that incorporates information related to the employment, remuneration or working conditions of migrant workers. Earlier analyses of collective agreements pointed out that bargaining was shallow and covered very few topics. Only one-third of agreements showed that trade unions actively participated in the process, but even these documents did not regulate the position and situation of outsider groups (e.g., Fodor et al. 2008; Neumann 2000). In larger companies, especially in the automotive sector, collective bargaining traditionally prioritised the protection of the interests of 'insider' local groups of employees (Neumann 1997, 2000), also since members of these groups tended to occupy key positions in trade unions and work councils. The interests of other social groups, especially classic labour-market outsiders, including foreigners, were considered secondary at best, especially in periods of crises.

IV. Media analysis

In order to assess the general discourse on the increased presence of migrant workers in the Hungarian labour market, and to assess trade-union and employer organisations' involvement in the media, we gathered and analysed articles from the online media, which were published between 1 January 2016 and 15 November 2020. Our main method was a three-step mixed approach (quantitative and qualitative) that was designed to reconstruct topics hidden in newspaper articles. After data collection, and before the actual analysis, we attempted to remove stopwords (e.g., prepositions and pronouns) occurring in the Hungarian language before analysis. After a basic content analysis, we looked deeper into the text corpora by running n-grams (*n* items from a given sample of text) and identified the most frequent bigrams and trigrams. In the final step, we used the Latent Dirichlet Allocation (LDA) algorithm designed to extract topics hidden in sample articles (Blei, Ng, Jordan 2003).

1. Case selection and data collection

There were two selection criteria for online news portals. The first was popularity, measured in number of visits to online media sites for the two periods of 2017–8 and 2019.[8] The second selection criteria was the ideological distance among the largest news portals. The most popular five news portals in these years were: index.hu (1st - most popular in 2017-8, 1st in 2019), origo.hu (2nd, 2nd), 24.hu (3rd, 4th), Startlap.hu (4th, 3rd) and hvg.hu (6th, 5th). The fourth most popular news site, Startlap.hu was eliminated for two reasons: its eclectic and popular genre, and the absence of its own search engine. In order to increase ideological differences, the most popular right-wing portal, Kurucinfo.hu, was selected (11th most popular in both 2017–8 and 2019).

After some test searches, four Hungarian keywords in public discourse were formulated that featured strongly and related directly to migrant workers, with the following order of importance: 1. guestworker (*vendégmunkás*), 2. economic migration (*gazdasági migráció*), 3. Ukrainian workers (*ukrán dolgozó*) 4. foreign workforce (*külföldi munkaerő*). Search engines for the five selected media were thus fed with these keywords. Only articles that were published between 1 January 2016 and 15 November 2020 were included.

[8] https://thepitch.hu/legolvasottabb-hirportalok-hazai-weboldalak-listaja/ and

http://ite.hu/legnezettebb-hazai-weboldalak-rangsora/

2. Main findings

The search results indicate the rising significance of migrant workers for the public and politics in general, amid controversial connotations. In the right-wing and pro-government media, there were very few relevant articles that did not change even after four searches with different keywords. In contrast, for the remaining three media, even the first keyword provided many relevant hits. In total, the search provided 337 relevant articles, of which 333 came from three of the liberal and mainstream left media (98.8 per cent). This means that there is a huge ideological contrast. In the official, right-wing media there is silence on this topic, while the other part(s) of the ideological spectrum have covered the topic extensively. A further interesting finding from the data-collection phase is that the bulk of relevant articles were concentrated in the 2018–2019 period (*c.* 60 per cent), which indicates rapidly increasing attention paid to this topic.

In the first step we grasped the most frequent words appearing in the selected 337 newspaper articles. Figure 1 shows the results. Besides the most common and obvious words of guestworker (*vendégmunkás*), Hungary (*Magyarország*) and Hungarian (*magyar*), the most popular relevant term was 'labour shortage' (*munkaerőhiány*), which indicates that the articles reflected on the main reason for the increased presence of migrant workers. Foreign (*külföldi*), Ukrainian (*ukrán*) and Romanian (*román*) were the main attributes, all of which have clear associations with migrant workers' nationality. Interestingly, a set of five words (all nouns) were government related: government (*kormány*), Orbán Viktor – the name of the prime minister, Varga Mihály – name of the finance minister, and Fidesz – the name of the ruling party, were thus associated commonly with the phenomena. Many articles posed a legitimacy issue to the government in asking how the government can be anti-migrant given that there are so many guest workers in the country.

Figure 1

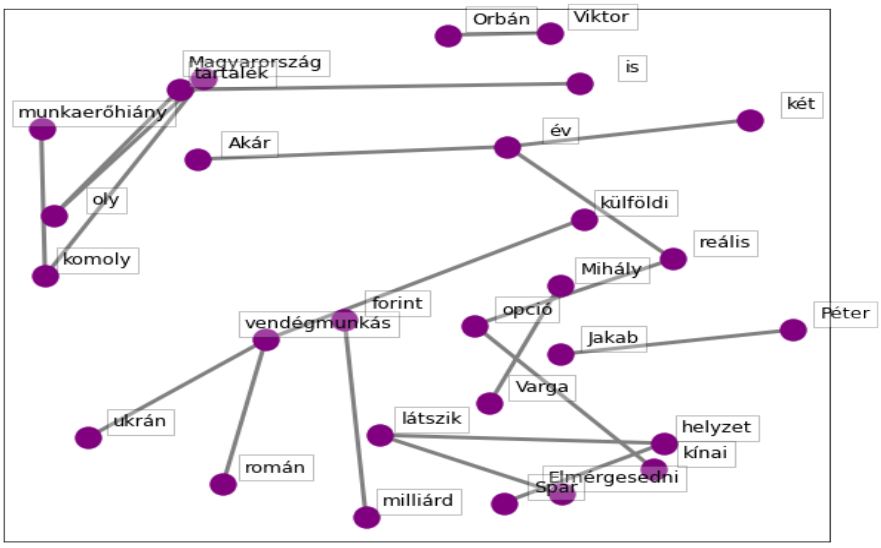
Word cloud. The most frequent words in selected Hungarian media articles

There are two other interesting sets of words that appear less frequently. One set relates to the economy (*munkaerő* – labour force, *gazdasági* – economic), sectors (*mezőgazdaság* – agriculture, *ipari* – industrial), companies (*cég* – company, *MOL* – a company, *alvállalkozó* – subcontractor). The second set relates to regulation and policing (*határ* – border, *rendőrség* – police, *engedély* – permit).

In turn, Figure 2 indicates the relative distance of these words to each other. In the central line around guest worker (*vendégmunkás*), the most common attributes of foreign, Romanian and Ukrainian appeared, but these were also associated with high labour costs (*milliárd forint* – billions of forints). The name of the minister of finance was also associated quite closely in the texts on 'costly' guest workers, but the right-wing opposition leader's name (Jakab Péter) also appeared in relative proximity. Finally, a separate, often mentioned, independently appearing sentence seems to be that Hungary faces huge labour shortages, and that there are no supplies, i.e. labour reserves.

Figure 2

Trigram. Most frequently appearing joint terms in selected Hungarian media articles



Finally, Table 1 shows the ten most popular topics generated from the five most frequently used words. Unfortunately, many of the words are only stylistic and thus the results can only be partly interpreted.

Still there are a few interesting results. Labour shortage (*munkaerőhiány*) seems to be associated with the unskilled (*szakképzetlen*). Two topics indicated the government's involvement with respect to migrant workers (Topic 5 and Topic 7). Topic 2 contained a set of words that indicate the involvement of national-

level interest-representative organisations amid acute labour shortages, and in the context of general anti-migration sentiments. Employers' organisation appears also in Topic 6, which suggest that employers were central actors.

Table 1

The most popular topics generated from the most frequently used words in selected Hungarian media articles

	Word 0	Word 1	Word 2	Word 3	Word 4	Word 5	Topic
Topic 0	miniszter	hosszú	tavaly	orbán	jön	óta	miniszter hosszú tavaly orbán jön óta
Topic 1	ír	év	okoz	nemrég	munkaadók	súlyos	ír év okoz nemrég munkaadók súlyos
Topic 2	országos	munkaerőpiac	gyors	szövetség	bevándorlásellenes	retorika	országos munkaerőpiac gyors szövetség bevándor...
Topic 3	vendégmunkás	külföldi	magyarország	ukrán	képzett	reagál	vendégmunkás külföldi magyarország ukrán képze...
Topic 4	munkaerőhiány	is	párt	szakképzetlen	ak	miatt	munkaerőhiány is párt szakképzetlen ak miatt
Topic 5	kormány	elképesztő	nemzetgazdasági	társelnök	bevall	két	kormány elképesztő nemzetgazdasági társelnök b...
Topic 6	magy	azegyszerű	változás	olcsó	gyáriparosok	welle	magy azegyszerű változás olcsó gyáriparosok welle
Topic 7	varga	három	munkavállalási	éves	akar	vállalkozók	varga három munkavállalási éves akar vállalkozók
Topic 8	német	deutsche	lehetőség	rekordoka	nő	engedély	német deutsche lehetőség rekordoka nő engedély
Topic 9	magyar	mihály	probléma	megbukik	szügy	tud	magyar mihály probléma megbukik szügy tud

V. Industrial relations and social dialogue tackling migrant work: main institutions and national-level social dialogue

1. Relevant institutions for social dialogue and collective bargaining

With very few exceptions, collective bargaining in Hungary is highly decentralised at the company-establishment level. Employer organisations typically do not engage in sectoral or higher-level collective bargaining, whereas trade unions are interested, but they have falling membership. In early 2020 the union density in the entire service sector stood at 7.9 per cent. Traditionally, the public sector was more unionised; in total, the industry density stood at 7.1 per cent,[9] and union members were typically employed in larger enterprises.

Especially since 2010, the bodies in charge of social dialogue at national level have a consultative, increasingly symbolic character. The two main bodies in charge of social dialogue are the National Economic and Social Council (NGTT) and the Permanent Consultative Forum of the Private Sector and the Government (VKF). As many have pointed out (e.g. Szabó 2013; Neumann and Tóth 2017; Árendás and Hungler 2019), channels of bipartite and tripartite social dialogue do not allow for the appropriate and real inclusion of social partners in the creation and implementation of relevant policies and reforms, but social partners were also not sufficiently included in implementing country specific recommendations during the European Semester (Nagy 2018). The NGTT is a very broad body that also involves representatives of civil society organisations, church and academic bodies, but it does not involve governmental representatives and it is not an appropriate body for social dialogue. In contrast, the VKF is authorised to cover a very narrow set of topics, and its agreements are not binding in a legal sense.

At sectoral level, in the non-public sphere, sectoral social-dialogue committees exist, including for construction, metals, tourism and retail. However, these have not received substantial funding from the government since 2010, and they are mostly inactive. New restrictive legislation, in force since March 2021, prevents collective bargaining in public healthcare.

In construction there was a sectoral collective agreement in place. However, this agreement was very shallow in the topics it covered, as it established minimal standards. The main employer organisation is the

[9] https://www.ksh.hu/docs/hun/xstadat/xstadat_evkozi/e_munkmin_9_18_03_02.html

National Federation of Hungarian Building Contractors (ÉVOSZ), which is a loose federation of about 200 partially competing members. The main trade union in the sector is the Trade Union Federation of Workers in Construction, Wood and Construction Material Manufacturing (ÉFÉDOSZ). Union density in the sector in 2015 stood only at two per cent.

In retail, collective bargaining is restricted mostly to large multinational retailers. For some of these, only collective wage agreements exist, while only a few have collective-bargaining agreements. The main trade union is the Kereskedelmi Alkalmazottak Szövetsége (KASZ). The sectoral-level employers' organisation, the Wholesale and Retail Federation (OKSZ) gathers all large retailers in the country but has very low-level competencies. The other two employer organisations are associations of small shops and cooperative shops. Similarly, in catering and tourism, only large hotels have collective agreements. The most significant relevant trade union is the Hungarian Trade Union of Catering and Tourism (VISZ) and the largest employer organisation is the Hungarian Hospitality Employers' Association (VIMOSZ), which earlier had a sectoral collective agreement. Earlier studies pointed out that the trade union does not prioritise the issue of atypical work due to low capacities (Meszmann 2018b). The union density rate in the sector is extremely low; in 2015 it stood at 0.9 per cent. The representative trade union of the sector, VISZ, experienced an unprecedented crisis during the Covid-19 recession as most of its members lost their jobs. In 2021 the union merged with another, more general union.

In the literature on collective bargaining in the metals sector, the automotive industry is the most discussed and elaborated. Information on trade-union bargaining positions and stances towards migrant workers is anecdotal. Judging from union stances towards atypical workers, especially temp-agency workers, the predominant stance in automotive companies was to limit their number rather than unionise them. Earlier, in large electronic companies, the trade unions unionised many temp-agency workers too (Meszmann 2016). Wage agreements and collective agreements are more common in large companies positioned higher in the product chain, but there are at least wage agreements in the group of medium-sized enterprises too. There is only one sectoral trade union, the Hungarian Metalworkers' Federation (Vasas Szakszervezeti Szövetség), and some inter-company initiatives (ÉTMOSZ) and a few independent plant-level unions at large manufacturers, which are comparatively strong trade unions. The density rate in manufacturing stood at 7.8 per cent. Among the employer organisations, the Association of Hungarian Vehicle Component Manufacturers (MAJOSZ) has been the most important employer organisation in the sector, but it gathers only subcontractors. In contrast, the Hungarian National Association of Machinery and Power Engineering Industries (MAGEOSZ) is an association that increasingly deals with sector-specific, economic and developmental issues. It cooperates with the metalworkers' trade union, but it does not engage in social dialogue (Tarnócziné Juhász and Neumann 2010; Meszmann 2016).

In healthcare, Kahancová and Szabó (2015) showed that even during reform years and mounting labour shortages, the bargaining position of sectoral trade unions did not improve. Also, revitalisation strategies and experimentation with more activist and inclusive practices in healthcare (Szabó 2017) did not bear fruit and make a breakthrough in terms of collective bargaining. On the side of labour, there is increasing fragmentation – there are several sectoral unions belonging to various confederations or that are altogether independent. The most prominent trade unions in healthcare for doctors are the Trade Union of Medical Doctors (MOSZ), which is closely tied to the Hungarian Chamber of Medical Doctors, and the Trade Union Federation of University Clinics (OSZSZ). For nurses, the Independent Healthcare Workers Trade Union (FESZ) and MSZ EDDSZ (Democratic Trade Union of Healthcare Workers) are the largest, the latter being representative. The unionisation rate is decreasing but is still above the Hungarian average – in 2015 it stood at 17.7 per cent. While public hospitals belong either to local municipalities, counties, universities or the state, the operative organisation representing managers is the Hungarian Hospital Association (MSZ), gathering directors of these establishments.

Finally, there are no employer organisations representing platform companies or trade unions of platform workers. Platform companies in general do not register as employers, and they do not take on employer responsibilities. In turn, platform workers at best create their closed online groups. In the on-location transport sector, especially city-level personal (taxi) transportation, employers and employees are also not easily distinguished, as traditionally drivers were individual small entrepreneurs who obtained services from and paid membership fees to taxi-organising companies. Still, there are a few trade unions, which mostly represent very small segments of drivers, and they are usually informally connected with only one of the taxi-organising companies. Social dialogue here took place rather formally at the city, at the Budapest Chamber of Commerce and Industry (BKIK).

The total **collective-bargaining coverage** in Hungary is quite low. In 2018 it was estimated at 27 per cent (Neumann 2019), but recent changes imply that it fell significantly in the most recent years. Collective agreements are more likely in the public sector and in large enterprises. Thus, low-wage, labour-intensive sectors in which smaller companies dominate typically have low coverage rates. In 2015, KSH, a biased, employee-based (and not agreement-based) survey indicated that the coverage was at 6.0 per cent in construction, 9.1 per cent in retail, 4.8 per cent in catering and tourism, 20.2 per cent in manufacturing, and 33.5 per cent in health and social care. In early 2020 the estimated coverage rates were 19.6 per cent for total industry and 18.8 per cent for total services. Since February 2021, collective agreements in healthcare have been annulled, and under a new special employment relationship, healthcare workers are not entitled to enter collective bargaining or conclude collective agreements.

2. Migrant workers' labour-market integration at the national level: social dialogue, views of social partners, experts and civil society organisations

There are two main employer organisations that participate in social-dialogue forums at national level, MGYOSZ and VOSZ. Of these, a representative from one organisation that represents larger businesses and has more significant capacities, was interviewed. There were no significant changes in the membership or the coverage of the largest employer confederation since 2016, and there were also no changes in the number of staff employed. Members of the employer organisation are sectoral employer organisations, and there have been no recent changes in the membership. Since 2016, the employer confederation's work has placed a greater focus on labour issues, especially on the question of how to cope with labour shortages, including regulation and taxation. However, more attention has recently been paid to the situation stemming from the Covid-19 recession and its economic effects. With only eight to ten members of staff, there was no one specialised to deal specifically with migrant workers. One person oversaw the entire general area of employment and the labour market, including policies and regulation. Another serious limitation in capacities was the lack of own database. The employer organisation monitored scientific reports, publicly available labour-market data, occasionally received reports from members, and it did not prepare its own in-depth analyses and materials. From a federation of temp agencies, it received disaggregated data on temp-agency workers, including third-country nationals, so it was informed about trends (EM02HU26022021). The employer organisation coordinates vertically among its members, but also with the European association Business Europe, and horizontally with other employer confederations. When preparing a proposal, the confederation gathers all experiences and tries to find common denominators and summarise the experiences in its proposals and reports.

Of the trade-union confederations, there are three – LIGA, MASZSZ and MOSZ – that traditionally represent the non-public sectors. They struggle much more with finances and have even more limited professional staff: there are very few paid experts and at best legal counsellors and experts for international activities, and no professionals to deal with migrant workers and their employment.

The union confederations are also members of international union federations.

Employment outlook and forms of employment. Altogether, the employer organisations' representative saw the number of migrant workers, especially from Ukraine and Serbia, rise between 2016 and 2019, but the pandemic changed the situation significantly. As of early 2021, it seemed that the numbers had fallen

significantly, also due to border problems and difficulties with mobility. This was manifest in the drop in temp-agency workers from Ukraine and Serbia. The employment of third-country workers seemed to be necessary in the long run too. The jobs offered, especially in manufacturing and construction, were not necessarily for the low skilled, as it is difficult to draw a boundary between skilled and unskilled jobs (EM02HU26022021).

Among the various employment forms, the significance of temp-agency work increased massively, as this form fills the gap of employer-requested flexibility, especially for seasonally required workers. More problems appear if one wants to hire migrant workers on a permanent basis. Another problem was the political climate and discourses, wherein general migration is sometimes deliberately confused with labour migration. Thus, employment of third-country national migrant workers is defined as a temporary arrangement. For Hungarian employers in general it was simpler to rely on and source the task of finding labour from Ukraine and Serbia to a temp agency. Temp agencies could then specialise in complex tasks (EM02HU26022021). Temp-agency work, in contrast, remained a weak point for unions. A typical stance, also expressed by a confederation vice president, was a very negative stance on temp agencies. Experts and civil society organisations (CSOs) also underlined the immense importance of intermediaries in the employment of migrant workers. There was background support from some employers to bring in migrant workers in an organised way. This could happen via a swiftly developing migration infrastructure, including housing, ads and networks. Migration infrastructure is developing faster than actual migration – this is both a regional and global trend (as pointed out e.g., by Xiang and Lindquist 2014) rather than a Hungarian specificity (EX03HU05032021). A recent interview with one of the largest temp-agency representatives confirms that temp agencies supply not only large multinational companies with (third-country national) migrant workers' labour, primarily in the automotive and electronics sectors, but also increasingly smaller companies, and sectors 'from logistics to the food industry'.[10] In the first half of 2021 the demand for workers from Ukraine rebounded – and a new governmental decree further increased the position of selected, larger temp-work agencies as qualified employers for supplying user companies with third-country nationals and assisting with the onboarding process. Temp agencies also advertise their services to workers, especially in finding good housing arrangements.

[10] Karácsony Zoltán Jönnek az ukrán vendégmunkások – betanított munka Magyarországon https://www.hrportal.hu/hr/jonnek_az_ukran_vendegmunkasok_-_betanitott_munka_magyarorszagon-20210818.html

For migrant workers in Hungary both temp agencies and student cooperatives (albeit only for students) have been central actors facilitating the employment of third-country nationals. Students from third countries have been typically employed via an intermediary – a student cooperative or a temp agency (WK03HU04082021). The largest CSOs, for example, advised students to establish direct contacts with student cooperatives, temp agencies or employers in strategic partnership with the government. Temp agencies permitted an extreme hiring and firing practice that also came to the fore during the Covid-19 recession.[11]

Interpretation and action. Up until 2016, union confederations had very few of their own project-based activities.[12] At first unions did not have a clear stance or react publicly to the question of migrant workers' presence in the Hungarian labour market. Migrant workers appeared in union confederations' standpoints only after an initiative was made by an employer organisation facilitating the easier access and employment of non-Hungarian-speaking workers from Ukraine and Serbia. Union confederation leaders reflected on migrant workers in the context of their evaluation of the labour-market situation in Hungary in the media, and more rarely, issued lengthier publications.

The main driver of the initiative and, consequently, of more significant labour migration, initially from Ukraine and Serbia, were labour shortages – according to a representative of the employer organisation – and these shortages therefore appeared as an obstacle to economic performance and growth. Labour shortages, in turn, were seen as induced by negative demographic trends, emigration, an inadequate educational system, and insufficient skill formation, which matches up with the interpretation of the other employers' organisation.[13] Besides the lack of available workers on the labour market, there was also a lack of skilled, or sufficiently educated workers, and thus both a quantitative and qualitative element behind the labour shortage (EM02HU26022021). A report on acute labour shortages in enterprises had surfaced by

[11] Students from "third countries" are especially and increasingly present in some university towns, see M. Császár et al. 2021

[12] https://www.liganet.hu/pr7523-budapesti-nemzetkozi-eszmecsere-a-migrans-munkavallalok.html

[13] see e.g. http://vosz.hu/hirek/324-fizetesek-kontra-munkaerohiany, B E S Z Á M O L Ó a Vállalkozók és Munkáltatók Országos Szövetségének 2018. évi tevékenységéről és a 2019. évi fontosabb célkitűzésekről vosz.hu/data/file/2019/05/24/vosz-kgy-beszamolo2019.pdf

November 2016 (Köllő 2017), as well as a research-based analysis of the labour needs of individual employers (GKI 2017).

Alongside these analyses, an initiative by the employers' organisation surfaced in June 2016, highlighting the need to employ workers from abroad, to bring in workers from Ukraine and Serbia (not only Hungarian speakers), and to make necessary regulation changes. The largest employer organisation prepared a short brief recommendation on how to remedy the situation, not as a solution but as a means of how to manage the shortage situation. These recommendations included permitting the employment of migrant workers from Ukraine and Serbia (but also, potentially, from elsewhere) as a short-term solution, as one piece in the puzzle while searching for long-term solutions. It was tabled not only as an important economic, but also as a social and political question, with specific recommendations on how to change regulations, acquire the most acutely missing skills and professions across the sectors, and to gauge the implications of using up various capacities. The model was available, as it had already been used in Poland and Czechia. This initiative was well received by the government and led to a change in regulations, which simplified the procedure for the employment of Ukrainian and Serbian nationals (EM02HU26022021).

As a response to the employer's initiative, union confederations came up with their general standpoints, communicating them in the media or on their websites. The unions did not reflect on demographic issues, but they did highlight the problem of immigration and the improper functioning of the education and training system. While there were no major differences on the union interpretation of the situation, LIGA rather stressed the issue of an improper education system as the main problem, and suggested bringing back labour-market leavers.[14] MASZSZ reflected more on the link between immigration from Hungary and low wages and MOSZ highlighted the weak labour-market institutions that were supposed to protect workers.[15]

Common to all these initiatives was a lack of attention to migrant-worker integration itself, and the adoption of a labour-market protectionist stance, which tolerated the presence of migrant workers temporarily. Thus, the LIGA confederation communicated that the employment of foreign workers is acceptable only as a temporary measure to remedy labour shortages, and jobs must be filled in the long run from the domestic

[14] Százezren tűntek el a munkaerőpiacról Infostart October 25 2016.
https://infostart.hu/belfold/2016/10/25/szazezren-tuntek-el-a-munkaeropiacrol

[15] Kordás László Beszéljünk egy kicsit a külföldi vendégmunkásokról 2017. 04. 12
https://ujegyenloseg.hu/beszeljunk-egy-kicsit-a-kulfoldi-vendegmunkasokrol/

labour market.[16] The confederation called for the creation of an employment policy concept, strengthening the education system and vocational training system.

The MOSZ representative stressed the danger of further labour-market flexibilisation, indicating that the real challenge was how to use the domestic labour force rationally, i.e., as sustainable elements within the Hungarian economy and society, and not as subjects of exploitation. The chair called for protection of labour-market institutions, such as inspectorates, and also emphasised the conscious downsizing of the collective protection of the Hungarian workforce, precisely in order to create one of the most flexible labour markets in Europe and thus attract investors.[17]

Still, the most vocal organisation in communicating its stance on migrant workers was MASZSZ and its representative. Its first reaction surfaced after the employers' organisation initiative was discussed, in which the chair said that emigration is a prime problem and therefore employers should focus on increasing wages, including bringing the net value of the minimum wage down to subsistence level, and they should consider substantial wage increases.[18] There were two more reactions. First, the chair wrote an article about employment of migrant workers in Hungary, drawing attention to a lack of involvement of unions in regulating this matter, while also commenting on a "too swift" regulation. While reflecting on the proposed number of workers from abroad, the chair pointed out that the concentrated, uneven presence of foreign workers in certain workplaces might have detrimental effects on wages and working conditions. Like the others, the MASZSZ representative also expressed the need for higher union involvement in regulating the labour market, commenting negatively on the uncontrollable inflow of tens of thousands of workers,

[16] Százezren tűntek el a munkaerőpiacról Infostart October 25 2016. https://infostart.hu/belfold/2016/10/25/szazezren-tuntek-el-a-munkaeropiacrol

[17] MOSZ Ezért van drámai munkaerőhiány Magyarországon https://munkastanacsok.hu/ezert-van-dramai-munkaerohiany-magyarorszagon/

[18] K. Kiss Gergely, Mégis kellenek a bevándorlók – tízezreket hívnának Magyarországra July 11 2016. Napi.hu https://www.napi.hu/magyar-gazdasag/megis-kellenek-a-bevandorlok-tizezreket-hivnanak-magyarorszagra.617396.html

especially from Ukraine. He stated that it was the union's task to represent all employees, including foreign workers, and he called on sectoral-level unions to deal with this task.[19]

When facing trade union and social opposition, according to the employer-organisation representative, the common position taken is to limit migrant work but labour market conditions do not allow this. A temporary agreement has been made on the short-term employment of migrant workers, which sufficiently fulfils employers' acute needs. A temporary solution is anti-migrant rhetoric alongside sporadic employment of migrant workers, while finding loopholes for employing them in larger numbers, which is not the optimal solution. Currently the legislation only permits migrant workers to be employed in the most acute circumstances, but this might change, as labour shortages increase further (EM02HU26022021).

Social Dialogue. Since 2016, at the main national-level social-dialogue forums (VKF), the issue of migrant work has appeared twice, but as earlier mentioned, the issue was not discussed as a separate point. First, it was discussed as a point related to labour-shortage management, while on the second occasion it related to regulatory changes that facilitated the easier employment of third-country nationals, especially those from Ukraine and Serbia. Whereas employer organisations initiated the process, the government came up with the regulation and the trade unions assumed a reactive role. The issue of foreign-worker employment featured as an issue during collective bargaining at a company, but it has not featured recently (EM02HU26022021).

As the forums for social dialogue did not include discussions, but only touched upon the employment of migrant workers, union confederation activity appeared as public reactions to employer organisations' suggestions and to legislative and regulatory changes from the government. Formulating the employers' initiative to employ migrant workers was not easy to table in a highly migrant opposing, xenophobic atmosphere (EM02HU26022021), which later culminated further in the actions of opposition parties. The main premise was negative: 'foreigners are coming and they will take away the jobs of Hungarians' – first written on government-sponsored billboards, and then – when the number of migrant workers was rising – the opposition picked up the issue as a criticism of the government. It then spiralled into public discourse and on the level of enterprises, where communication and engagement were needed, showing that there was a need for new employees (EM02HU26022021). Two other points were signalled: one was that migrant

[19] Kordás László Beszéljünk egy kicsit a külföldi vendégmunkásokról 2017. 04. 12 https://ujegyenloseg.hu/beszeljunk-egy-kicsit-a-kulfoldi-vendegmunkasokrol/

workers' employment results in social dumping, while the second was that migrant workers keep wages low. Both statements were considered false – the first because the numbers were too low for such an effect, and the second because the same wage regulations applied to migrant workers as they did for Hungarian citizens – at least in the case of large employers. Finally, the cost of employing foreign workers was higher due to additional costs – thus it appeared counterintuitive that employers would rather employ foreigners (EM02HU26022021). The employer organisation did not really have capacities to monitor how the system works and its potential problems, and so it relied on member reports. There were no major or significant conflicts at workplaces recorded by the employer organisation. Altogether, it seemed that the employer organisation did not have complete information about the situation on the ground.

Regulation. Neither employer organisations nor trade unions are involved in regulation; they were not members of any working groups. One employer organisation still had an open door to table its initiative and accept an uncertain outcome, which could eventually have a quite-surprising result. In the case of regulation to remedy acute labour shortages, the result was satisfying for the employers' organisation (EM02HU26022021).

The most vocal union confederation reflected in length on the dual standards of the government regarding migration, but also on the untransparent decision-making, loophole policies and the lack of openness for social partners to influence regulation.

The government policies were characteristically Janus-faced. While inciting xenophobia, companies were trying to recruit guest workers from eastern Ukraine. The opening of legal loopholes was almost a secret. Of course, neither the local nor the national interest groups were consulted, and the latest talk is that Pakistanis may come as well (MASZSZ 2018: 6).

The union confederations altogether seem to fall into a trap due to their insistence on the employment of migrant workers as a temporary arrangement that seemed to cement their limited engagement with the issue. Altogether, the problematic of migrant workers' labour-market integration did not appear fully as a point on the union agenda – including covering the problems that migrant workers actually face.

Recommendations. Occasional direct recommendations to the government do not usually go through. The employer organisation also wished for higher transparency in concluding bilateral agreements between Ukraine and Hungary so as to make labour contracting smoother and more transparent, with certified state support behind it. However, due to the political climate it was unrealistic to expect such a move.

Besides including unions more in decision-making, union voices declared that the state should find resources to provide sufficient information to migrant workers, and not only to finance recruitment from public funds (MASZSZ, 2018).

There was a need to further increase the capacities of social partners and employers' organisations, e.g., via state support (EM02HU26022021).

Migrant-worker problems and their integration. Neither employer nor trade-union confederations had more in-depth data, and they did not publish reports on migrant workers' problems related to their integration into the labour market and society. According to the employer-organisation representative, there were no big conflicts at workplaces due to migrant workers' employment. The interviewed employers' organisation was aware of minor conflicts or resentments due to the beneficial housing of migrant workers (mostly in dormitories), but this could be remedied by establishing criteria based on distance. The representative also did not consider that solving social and other problems that migrant workers face is the employers' task.

Furthermore, the need for broader integration beyond the workplace did not feature, as these are temporary work engagements for groups of non-Hungarian-speaking workers, who presumably stick together, come to work only, earn as much as possible, do overtime work, and are not interested in integration (EM02HU26022021).

The lack of knowledge of the Hungarian language among third-country-national migrant workers, and the lack of information was a point noticed by the MASZSZ representative, and he encouraged the sectoral unions to deal with this matter more extensively and in more depth.[20]

Experts variously evaluated the role of social partners and union involvement, but also the role of employers. Yet they seemed to be equivocal in their position that social partners' regulatory power is weak, especially that of unions. One expert highlighted that trade unions are xenophobic (*idegenellenesek*), but they also pointed out a trend whereby in workplaces with greater numbers of migrant workers, the trade union often loses ground (EX02HU03022021). One expert judged the trade unions to be open to the issue of migrant workers, but this openness then stops at the level of words, without further action and

[20] Kordás László Beszéljünk egy kicsit a külföldi vendégmunkásokról 2017. 04. 12 https://ujegyenloseg.hu/beszeljunk-egy-kicsit-a-kulfoldi-vendegmunkasokrol/

involvement. The trade-union scope of action was judged to be minimal, especially for temporary migrants employed via temp agencies, hired e.g., for precarious jobs as in logistics (EX03HU05032021) Finally, CSOs had no contact with trade unions, and only one had contact with individual employers. As for the employers, there are certainly positive examples of individual companies, especially those that hire skilled, middle-class employees, offering advantageous integration packages and family benefits. However, as these individual strategies change over time, depending on market success, integration packages may be tightened. An epistemological problem is that no companies would report openly in today's Hungary as being a migrant-friendly employer (EX03HU05032021).

One expert points out the massive contradictions surrounding the employment of third-country nationals: the anti-migrant and anti-migration propaganda of the current government, in most acute cases, with state-sponsored billboards in Hungarian stating "if you come to Hungary, you cannot take away the jobs of Hungarians" and a state-sponsored, increasingly developed network, with lax regulation and infrastructure for the employment of third-country nationals (EX01HU14012021). Consequently, a very negative political climate exists surrounding migration, which was confirmed by all experts. In the background there seems to be a major social trauma, collective anxiety, or as an expert highlighted, 'cognitive dissonance'. Around the start of the global financial crisis, a representative survey detected, compared with other EU members, record-high tensions along rural–urban, intergenerational, interethnic and class (affluent and non-affluent) lines in Hungarian society. A year or so later, a similar survey showed how these tensions then transposed to hostility towards foreigners (EX01HU14012021). Recent surveys and studies also pointed out that in the EU, Hungarians are the most opposed to foreigners and migrants (Messing and Ságvári 2019). The finding that the most opposed subgroup are those migrant workers who would take on the most basic jobs is especially perplexing, given that this could be classically viewed as a source of economic upgrading. Such a stance is in a tight negative correlation with educational level: the less educated are more against migrant workers. High-skill migration is better tolerated, and the more educated are more supportive. Extremely negative perceptions associated with migration are manifest in cognitive dissonance: for example, there is no generic term for Hungarians working abroad (people on a low income and not immigrants!), there is a refusal to think up equivalent terms for labour migrants coming to Hungary for similar reasons, and there is a sticky image of 'the' migrant, a male Muslim who is coming to conquer, kill and rape. Such stereotypes then create major social and contextual obstacles to the integration of labour migrants (EX01HU14012021).

The second issue was economic. As one expert asked rhetorically: "integrate into what?" The jobs offered to third-country migrant workers are typically highly precarious – they are not as well paying, as in the

service sector, for example. One point that was then stressed was that an isolated dead-end enclave of migrants participating on the outskirts of the labour market seemed to be tolerated. This is exemplified by isolated enclave shops managed by Chinese and Vietnamese people. In these cases, labour-market integration happens by one planning ahead and bringing 'tons of medicine' along upon arrival to Hungary (EX02HU03022021) The representative attitudinal research also confirmed that this kind of integration is acceptable to society, i.e., those Vietnamese or Chinese are 'not migrants' (EX01HU14012021). From 2013, and increasingly in a regional town, seasonal jobs in construction and services, and jobs in manufacturing seemed to have a temporary character. These jobs did not necessitate knowledge of languages and were more hidden from the public eye. The contracting was for a fixed term (mostly via temp agencies), although minor employment contracts seemed to also be acceptable to migrant workers. Migrants, at least from Ukraine, were planning to come to work for a fixed-term period only, to earn as much as possible in a short time and move further, while issues related to social security did not feature initially as a primary concern (IO3HU12072021). Some experts and CSOs also highlighted the uneven presence of migrant workers, who were 'inserted' rather instrumentally in certain sectors, among certain (privileged and strategically important) employers and business-cycle-related seasons (EX01HU14012021, EX02HU03022021, IO2HU01062021). CSOs reported that they also linked students with intermediaries, especially student cooperatives (or shared information about employers, i.e., strategic partners of the government). These people then have a faster route to employment among employers and sectors that need seasonal or an extra labour force for production peaks.

Finally, social conditions, especially the housing crisis, create highly unfavourable general conditions for longer-term planning regarding new settlers (EX02HU03022021, EX01HU14012021). Insecure, temporary employment, as well as insufficient means to provide livelihoods at even subsistence level amid huge housing expenses means that Hungary is likely a transit country, or a country of temporary employment for many third-country nationals (EX01HU14012021). However, besides the state's strong interest in naturalising some segments of those who are foreign-born (EX02HU03022021, EX03HU05032021), there is little interest in real labour-market integration – not on the part of employers, state actors, or possibly also temporary workers (who miss stepping stones for elevating the highly precarious status that the Hungarian labour market puts them in). These are clear signs, but the data are still missing to strengthen this conclusion. Labour-market participation and the employment rates of migrant workers are high. However, we cannot really talk of the labour-market integration of the bulk of third-country nationals but only of short termism and circular or temporary migration. An expert thus pointed out that the statement

whereby third-country nationals are coming to Hungary only as a stepping stone to move further abroad is a self-fulfilling prophecy – an outcome of a process that tends heavily towards it. For example, as there is no opportunity to learn Hungarian, only docile, 'well behaving', 'healthy migrants' are tolerated in the country (EX02HU03022021). Both the general and specific problems behind labour-market integration were also corroborated by those who work with migrant workers in their daily work, such as CSO representatives and one translator.

The civil society perspective

Since 1990 when refugees from Romania came to Hungary, civil society organisations historically played an important buffer role as a bridge between migrants and public authorities, at least until 2015.[21] Since then, the efficiency and capacities of CSOs have been more moderate, although sporadically, in some districts of Budapest there may be more intensive programmes and positive examples (EX03HU05032021). CSOs have limited organisational capacities, as well as a limited territorial and social outreach, and can only consider a limited 'number of cases', but they were especially creative in creating open social spaces, and they also provided labour-market-related services and could report problems related to the labour-market integration of third-country nationals.

CSOs are implementing project-based activities based on external funding, which deal with third-country nationals' integration. Most organisations have a limited number of project-based personnel. Thus, some CSOs have created a community around their activities, as well as a network of volunteers, so as to make their activities more sustainable. It has been especially difficult since 2018 for civil society organisations to obtain migration-related funds. In 2018 many projects related to migrants' integration were finished and publicly disseminated, and 30 per cent of these EU projects had governmental funding. However, this was at a time of political mobilisation, when the political opposition pointed out that the government is anti-migrant, whereas it supports migration. The government's response was to terminate all funding for projects related to migrants, foreigners etc. Some CSO programmes and projects specifically started as a counterweight to the anti-migration sentiment and propaganda, so as to create a society within a society, or a 'sample' intercultural community (IO01HU02042021). Projects rarely have a labour-market integration component; these are information dissemination events, i.e., projects that try to map and strengthen good

[21] See, for example, a CSO report to Budapest-level authorities on the integration of migrant workers from 2013: Szakpolitikai ajánlás a harmadik országbeli állampolgárok integrációjának erősítésére Budapest Főváros Önkormányzata számára Az önkormányzati feladatok fejlesztésének lehetséges irányai a szociálpolitikai és az egészségügyi ellátórendszerek terén https://budapest.hu/Documents/Szoc_eu_ajanlas_1.pdf

practices or new initiatives, and report problems. Some CSOs build more on personal involvement, and spontaneous community activities, such as learning cultures and urban space, with the involvement of local volunteer mentors; however, there are also other organisations with counselling or support services. In these instances, labour-market information and support depend on the specific requests of migrants and their individual mentors' knowledge. CSOs remedy information deficits, provide training for soft skills, and offer social support infrastructure. In terms of employment, they only help indirectly by instructing contacts on how to reach relevant institutions such as employment offices, and how to make appointments for example (I001HU02042021).

The largest organisation, and the only one with permanent labour-market integration programmes, includes three strands of educational activities. The first strand spreads social sensitivity and awareness mostly related to how professionals, such as teachers and social workers should work with migrants. The second strand is actual social services, i.e., social work with migrants. The final strand entails preparing research, analyses and tables, in order to make recommendations. The organisation lost its influence on decision-makers (and decision-makers' openness to them) over the last six years, which has also caused greater pressure on their direct-service activities to migrants. The social-work component especially relates to migrants' integration into the labour market. CSO employees with a social-work background are helping migrants with job searches, and with the procedures to gain the necessary permits, and legal and other counselling help. This is a strand of activity that has increased over the years. Migrant-worker integration thus relates to the provision of information, know-how and assistance in gaining legal employment. The CSO also has services that target smaller enterprises, e.g., while offering cultural mediation. While this CSO is very active in supporting migrants to gain employment, they have no capacities to monitor or follow up after contact has been established between a migrant and an employer, and after a contract has been signed. Few students return and ask for clarifications on their rights and obligations after they have signed a contract, and attending with a contract to discuss it before signing is an even rarer occurrence (IO02HU01062021).

CSOs typically only operate in the central area of Budapest, and the most typical social cohort that turns to them is students who are third-country nationals. Labour-market integration in the case of students relates to getting employment opportunities – either as an additional source of income alongside a stipend – or after completing their studies when searching for jobs, and the struggle to change their status that comes with this change. Moreover, an interview with a third-country student also indicates another reason: the decision to work in between study periods to 'kill time', and so their socialisation into wider society seems to happen via work and formal employment. There are typically rather few work opportunities for students, especially in the regional university towns. The jobs present are in the service sector (e.g., call centres) or

in platform delivery services, and assembly-line jobs also seem to be open. These 'physically' or 'mentally' stressful jobs still offer a main avenue for interaction with (English-speaking) locals, while for some, such jobs are crucial and the only way to make ends meet (WK03HU04082021). In the countryside, in some towns, recognised national minorities have their own minority government institutions, and there are also institutions for Ukrainian national-minority members who have Hungarian citizenship. Still, Hungarian citizenship is the formal requirement to participate in the life of these Ukrainian cultural institutions. When asked, neither the Serbian nor the Ukrainian institutions mentioned institutionalised connections and activities with migrant workers from Serbia or Ukraine. Still, there seems to be a certain spillover effect. A former representative at the Ukrainian national minority in Hungary encountered migrant workers from Ukraine, but she only maintains the connection to migrant workers from Ukraine as a translator, translating regularly to Ukrainian workers (IO0312072021).

Both CSOs and the interviewed translator identified the recurring problems that migrant workers face. The first stems from a lack of knowledge of the Hungarian language and an associated information deficit. Here, the first dependency comes into play. With the students, this depended on the employer e.g., also providing contracts in English or providing adequate translation. Contracts were rarely translated in rural locations; the best situation regarding contract translation was in the large manufacturing plants. A common practice was to only translate the main points of the contract orally. Non-Hungarian speakers often had a translator or interpreter at their disposal in the workplace, but not outside of it, e.g., for solving health issues. The lack of knowledge of Hungarian was partly remedied in Budapest mostly by attending 'survival' Hungarian courses, and by using mobile phones in the countryside (IO01HU02042021).

The information deficit then played out with no knowledge of rights. Submission of (translated) papers for more beneficial income taxation (for parents with non-adult children) was also not communicated to migrant workers (IO03HU12072021). Neither migrant workers nor students were aware of rules for paid leave, sick pay etc. The best-case scenario was a good employer who would provide timely and complete information. Students whose studies had ended but who wanted to become employed in Hungary also faced a strange situation. Whereas students are typically aware that they can take up contracts for part-time work only, with full-time contracts only during the two months of summer, they do not know how and under what conditions they could they work in the transit period after they finished their studies, and they often applied for a job. For students, these transit periods are rigidly regulated, wherein a student should leave the country immediately after completion of studies. However, 'it looks unnatural to return to the home country and seek employment from abroad, when one is already in Hungary' (IO02HU01062021).

The most acute problem related to improper employment, and it stemmed solely from employer dependency and misconduct which could put the status of migrant workers in jeopardy too.

> *If you work somewhere with a residence permit, a work permit and were improperly employed, not only the employers, but the TCN employees could be sanctioned too, as their status could also be in jeopardy. The work permit is pegged to a concrete employer, and a TCN worker can only work for the employer to whom the licence was given, and one can't work anywhere else. Unfortunately, there are examples, cases, where TCN workers were improperly employed. The employee didn't even know that they were currently working for another company on paper, as they were working for the same company physically. But in Hungary we know how many times an employer redefines itself ... And when an inspection revealed that they were not even registered with the (new, redefined) company where they actually work, their licence was revoked and they were deported from Hungary. Unfortunately, there are such cases. It's a trap, of course, unfortunately (IO02HU01062021).*

For both temporary workers with residence permits, and for students, the biggest problem stemmed from their social-security status, i.e., whether they held a social-security card or not. If not, as for those with various kinds of residence permits, such as students or temporary workers, they could only have private insurance and had much fewer rights than those with settlement permits or other kinds of permanent status. As the monthly social-security fee for a third-country national, i.e., for a social-security card, is very expensive (almost 80 per cent of the net minimum wage), many therefore turn to private providers. At the same time, those who receive residence permits sign a paper that says that they cannot be a burden to the Hungarian state (IO02HU01062021). With private social security only, especially in the rather murky schemes of migrant workers, medicalisation and hospitalisation was not really an option. In the case of temporary migrant workers in a regional town, even paid sick leave was not an option: at best a person could use up their holiday, but they could even be fired. If someone broke their leg or arm, they were instantly fired and forced to leave their home.

> *If you become pregnant, they will fire you. The girls consider staying here to give birth, but then I inform them that if their employment has been terminated, they have only 45 days to live on their social-security card. After that, everything that happens in the hospital, staying there, it must be paid for (IO03HU12072021).*

The Covid-19 pandemic has further brought to the fore the precarious situation of migrant workers and third-country national students with private insurance. Laid-off workers, who included migrant workers

from neighbouring countries, suddenly filled the homeless shelters.[22] When vaccines against the novel coronavirus became available, at least in the first few months, foreigners who did not have social-security cards also could not get vaccines. This changed gradually later on (at first only one type of vaccine was offered to foreigners, without a choice), which indicated a rather hostile stance towards foreigners (WK03HU04082021, IO02HU01062021). Blue-collar workers from Ukraine who were based in the countryside and became infected with the novel coronavirus had an even more acute situation:

> *A husband and wife … were both infected with SARS-CoV-2. The husband was very, very ill and was still [forced and able] to drive home. But let's stress that it's not Transcarpathia (i.e., a distance of a few hundred kilometres), but 2,000 kilometres further [East]… [Later] he said that even before he arrived [home] the [letter] had arrived by airmail stating that they had been fired (IO03HU12072021).*

The restrictive and complicated nature of granting a work permit or residence permit created comparative advantages to intermediaries, in the sense of specialising and taking on the massive amount of paperwork, thus unburdening the employers. If a person wanted to gain a permit, they would have to prepare a massive pile of papers, know the language and be aware of all the regulation. Paperwork had to be repeated periodically and the forms and papers changed over time too. A report from the largest CSO also highlights that for those migrant workers who try to secure working permits individually, this is extremely difficult:

> *People either tried to organise their work permit by themselves or with their company. They had endless stories about the immigration office, the slow and over-bureaucratised procedure, how many times they had to go there, how many hours they had to wait or how many times the immigration office lost their documents. They all agreed that there is a huge demand for a quick and transparent process for getting a work permit in Hungary (Menedék 2021, 11).*

But it is similarly complicated for employers. Many employers did not want to deal with employing people directly, even workers proven to be good, and they insisted on using an intermediary. User companies would also redirect migrant workers to temp agencies (IO03HU12072021). Besides being complicated, the procedure was also long. There was a 70-day-long waiting period until the request for employing a third-

[22] Nagy Gergely Miklós Már érzi a budapesti hajléktalan-ellátás a munkásszállókról érkező tömeget 31 March 2021.

country national was answered, which was an 'unnaturally' long period for an employer who wanted to hire someone immediately (IO02HU01062021).

VI. Sectoral collective bargaining, capacities and strategies of social partners

In this chapter we provide the results of interviews conducted on social partners capacities, their strategies related to the labour-market presence, and the integration of migrant workers. We interviewed sectoral representatives and experts in the following sectors: construction, the automotive sector, service sector (HCT and retail), healthcare (hospitals) and platform work (personal transport).

1. Construction

Capacities. According to the union representative, the very modest trade-union capacities have stagnated or even fallen since 2016. The already very low union membership fell even further. The union organises a small percentage of all workers in somewhere between 60 and 80 workplaces. There is even one county with no basic trade-union organisation. As for organisation at the sectoral-level, there are only two paid professional unionists. Although the union is curious about developments, it has no capacity to monitor or collect data on migrant workers in Hungary. One respondent reflected on the experience of core EU immigration countries, in which he knew that the unionisation of migrant workers is a very challenging and costly activity. The examples of Sweden and Switzerland were mentioned, where trade unions hire Serbian- or Portuguese-speaking officials to make unionisation possible (TU0412022021).

The employer organisation has significantly higher capacities, paid professional staff and infrastructure. It has a few hundred employer members, and it gathers not only most large and some medium-sized companies, but also a cross-section of the many small enterprises. Still, it does not seem to have special capacities to deal with migrant workers; migrant workers feature indirectly as an issue in regular labour-market analyses based on the organisation's own data and reports.[23]

[23] The assessment is based on media and publicly available reports, as well as informal communication with the employer organisation's president.

Interpretation of the situation. According to the unionist interviewee, the sectoral business cycle in the 2016–2018 period expanded by about 10 per cent, which resulted in higher demand for labour and labour shortages. When explaining the lack of workforce, the unionist referred to the problem of labour in construction, which had, according to him, three root-causes in Hungary. The first was a demographic cause, as an increasing number of retirees are not compensated by new young entrants into the sectoral labour market. Second, there was a decrease in the prestige of physical work found throughout the EU, which hampers the appeal of the sector to new generations, and thus fewer students enter vocational schools. These two causes were common in many other EU countries too. The third cause is that because the pay levels in Hungarian construction are modest, workers tend to leave their profession for a different sector, or remain in the sector but leave the country for a different EU country in which it is better paid (TU04HU12022021). Such an assessment is quite like the one made by the employer organisation, which insists especially on reforming vocational training in order to remedy the labour shortages.[24] The Covid-19 recession affected both the business cycle but also the labour market in the sector. In summer 2021 the sector seems to have started expanding again, and the labour shortages already seem to be acute. During the first two waves, the labour market did not seem to suffer that much, as many workers returned from abroad or were stuck in Hungary.

Although he did not monitor the situation, the union interviewee thought that, after Hungarian- speaking workers from neighbouring countries, the bulk of migrant workers were Ukrainian and Serbian citizens. More recently, he thought that workers were also arriving from distant countries such as Mexico or Mongolia. The dirty, often dangerous working conditions attracted many socially problematic, awkward male cohorts. He also considered that many third-country workers only sought employment in Hungary as a stepping stone, to find work in a country closer to the West. Also, many would rather go to Slavic-speaking countries, where integration is easier for them. The number of migrant workers in Hungary was judged to be very low, but it could grow in the future (TU04HU12022021). This assessment seems to contradict both the statistical data and the number of recorded third-country migrant workers in construction during inspections. The labour inspectorates' data show that the proportion (both in absolute terms, and among those workers who were inspected) of third-country nationals increased over the 2016–18 period from between two and three per cent of all workers to around five or six per cent in 2019 and 2020.

As for employment forms, according to the unionist, informal or shady contracting was typical for Hungarian-speaking migrant workers too, and these practices prevailed in small and micro-sized,

[24] see for example: Munkaerőhiány és munkanélküliség az építőiparban Világgazdaság. 28 September 2020. https://www.vg.hu/cegvilag/2020/09/munkaerohiany-es-munkanelkuliseg-az-epitoiparban

subcontracted enterprises. Workers would contract officially for a registered two, four or six hours per day on minimum wage, but they would in fact complete a full working day and sometimes overtime, with additional payments in 'envelopes' being common too. Such arrangements were especially common in subcontracted firms, but also for employment without any contract. Posting of workers to Hungary, according to the union representative, is not characteristic. More recently, the use of temporary agency work seems to have increased in the sector, as this seemed to be the only viable solution for contracting and bringing in larger groups of workers at short notice across the border. The representative of the employer organisation stated similarly that there are no significant differences between contracting third-country migrant workers and Hungarian workers; similar practices emerge, especially since most Hungarian workers are also not local workers and the problems of accommodation and cost-sensitive contracting remain present (Csukás 2020).

Integration problems: causes and interpretations. In terms of problems, the union representative speculated that the lack of knowledge of Hungarian is the root cause of integration problems. Workers were therefore more vulnerable at work and even more dependent on their employers. A crucial information deficit could have resulted from the lack of information on health and safety rules, and the increased danger at work. In addition, there was a significant anti-migrant atmosphere in the country that hampered their integration. These resulted in migrant workers adopting a distancing behaviour towards the authorities, including towards the trade unions. The union representative confirmed here that local Hungarian workers typically also were not aware of their rights in the Labour Code, and Hungarian-speaking third-country nationals were in a similar position. In contrast, the employer representative did not see significantly different problems at work for third-country nationals than for local migrant workers.

Role of employers and intermediaries. According to the interviewee, the employers' role in dealing with the worker deficit was crucial, as they typically either hired workers without qualifications to do the work, or they hired workers from abroad. In contrast to earlier times, when commuting across border areas was possible for many third-country nationals, the union respondent also commented that the role of intermediaries and of employers have increased. Intermediaries were also often in charge of the administrative work, securing permits etc. Temporary work agencies were crucial in bringing in new people, arranging employment and securing adequate conditions for their work, especially for workers from more distant places. The union representative also considered the role of platforms and social media to be very important in recruiting migrant workers, and they also offered what was sometimes unrealistic remuneration etc. Similarly, the role of informal networks was judged to be very important. Recruitment also entailed attracting workers who were already in the country but who were working for different companies, with promises of higher pay, better working conditions etc.

Regulation. The union did not follow the regulation of migrant work in the country, and it did not believe that in terms of labour law there were different relevant provisions. According to the unionist's knowledge, the regulation of migrant work did not feature as a separate regulatory issue.

In contrast, the employer organisation followed the labour regulations, and it suggested simplified ways of employing workers from abroad from the moment when changes to the regulations occurred. In spring 2016, the employer organisation thus proposed an interstate agreement to enable posts for workers from Ukraine, i.e., a three-month work arrangement.[25] It also participated in and supported the formulation of simplified rules and labour regulations for third-country migrant workers via the main employer confederation.

According to an expert, semi-informal work was typical common in construction, as in other seasonal jobs, such as agriculture. Due to very complicated regulations, people working in seasonal occupations could not make their employment status legal. For them, informal work was easier than going through the paperwork and the administration, so they instead opted to work in the grey zone and then went back home. Such a practice remains to this day, with one important caveat: for workers who their actual employer is ultimately matters, as it requires extra-institutional trust and bonds with an employer, or rather with an entrepreneur who organises the whole brigade (EX02HU03022021). On a similar note, another expert highlighted the huge problem of implementing regulation, and the labour inspector's negative role in the eyes of the migrant workers (EX03HU05032021).

Strategies. For the employer's organisation, the employment of migrant workers was only one of the instruments through which to increase the labour pool and cope with the immense labour shortages the growing sector had been facing since 2016. The organisation also attempted to call back Hungarian immigrants who were skilled construction workers from Germany and Austria,[26] and it also sought to influence educational reform, increase the number of students for relevant professions, and find ways of

[25] Pintér Balázs "Ukrajnai szakmunkásokra alapozna az építőipar az átmeneti létszámkontingenst más ágazatokra is meghirdetnék" Magyar Idők. May 10 2016. https://www.magyaridok.hu/gazdasag/ukrajnai-szakmunkasokra-alapozna-az-epitoipar-653848/

[26] See for example Szabó Ákos Az építőipar meghatározó szereplői hívják haza Németországból a szakembereket Magyarepitok.hu 7 June 2019. https://magyarepitok.hu/iparagi-hirek/2019/06/a-magyar-epitoipar-het-meghatarozo-szereploje-hivja-haza-nemetorszagbol-a-szakembereket

delivering vocational training.[27] It also proposed state support for the development of migration infrastructure, i.e. for the construction and operation of worker dormitories.[28] Furthermore, an opportunity related to the sector's digitalisation included relying more on highly trained engineers and decreasing labour demand.[29]

In contrast, the union did not have sufficient capacities for dealing with migrant workers, but it also did not plan to engage with them. There were several reasons for this. The unionist stated that he considered the Hungarian labour market in general and specifically the situation for construction workers, where emigration was more common than immigration. In sum, he judged the total number of migrant workers to be very low. Finally, he anticipated that the organisational costs of dealing with migrant workers would be too high and the benefits very low, which would not make the new practice organisationally sustainable. Nevertheless, the respondent in general recognised the threat of social dumping that is commonly associated with migrant workers employed under worse conditions than locals. Importantly, the unionist stated that the sectoral union lacked the capacities to even protect local workers, and therefore the protection of migrant workers seemed an especially unrealistic task. *Even winning temporary projects would not create such organisational capacities or enable a sustainable solution for working with migrants in a systematic way* (TU04HU12022021).

The union cooperated closely with the employer organisation. More specifically, it seemed to follow a joint stance with employers on supporting skill formation via lobbying for increasing Hungary's capacities for vocational training and education, thus generating more skilled workers from Hungary. The union also cooperated with trade unions from abroad. It was in contact with the union from Serbia, but there was no concrete cooperation targeting workers coming from Serbia. There was no contact with unions from Ukraine. The union representative could not record best practices in terms of solutions due to a lack of relevant experience, and there were no members among third-country nationals.

[27] Hegedűs Gergely Gyakorlati központokkal reformálná meg az építőipari képzést az ÉVOSZ 4 February 2019. https://magyarepitok.hu/iparagi-hirek/2019/02/gyakorlati-kozpontokkal-reformalna-meg-az-epitoipari-kepzest-az-evosz

[28] https://magyarepitok.hu/az-evosz-javaslatai-az-epitoipar-problemainak-kezelesere

[29] Szabó Ákos Építőipari Konferencia: a digitalizáció a jövő egyik kulcsa. Magyarepitok.hu 7 October 2018 https://magyarepitok.hu/iparagi-hirek/2018/10/a-digitalizacio-a-jovo-egyik-kulcsa-az-epitoiparban

Social Dialogue. Although there is a sectoral-level collective agreement, social dialogue at the sectoral level exists only formally, while in substantive terms over the last five years, the level of interaction has deteriorated.

2. Automotive industry

In the automotive industry, where the increase in migrant workers has been most visible in recent years, employer organisations are not interested in collective bargaining, and they only occasionally participate in social dialogue through official channels. On the union side, a sectoral unionist, as well as a regional and a plant-level unionist were interviewed. The sectoral union's capacities will be presented alongside general information and strategies, but at the plant-level more concrete practices will be assessed.

Capacities. In terms of coverage, the metals union reported a stagnation, and then a slight increase in membership numbers since 2016. It is present typically and almost exclusively in medium and large plants. Of these, around 40 have some sort of collective agreement – at least a collective wage agreement. The union does not have the capacity to deal with the employment and integration of migrant workers. It does not collect specific data on migrant workers, nor does it follow official statistical data, as official statistics do not really follow this issue. However, it does monitor developments in affiliated plant-level unions, and these report changes in employment, as well as contracting arrangements. Thus, information on the employment policies of automotive companies, both temp-agency work and migrant work, is communicated to the sectoral union. The membership data show that there are migrant workers from Serbia and Ukraine among its rank-and-file members.

The unions have no interaction with employer organisations on employment and employment policy, but they are in contact with an employer organisation that loosely gathers employers in the automotive industry and organises conferences and production-related exchanges. At the plant-level union, a union representative supported by a regional union expert (TU05HU18022021) deals directly with the unionisation of migrant workers, and they try to find solutions to the workers' specific problems.

Employment trends. An employers' federation did not publicly voice the need to employ third-country nationals, but rather called for more efficient and intensive use of labour, as well as education reform. The issue only emerged in relation to hiring via temp agencies, given the generally volatile business situation.[30]

[30] Beszámoló a Vállalkozók és Munkáltatók Országos Szövetségének 2018. évi tevékenységéről és a 2019. évi fontosabb célkitűzésekről. vosz.hu/data/file/2019/05/24/vosz-kgy-beszamolo2019.pdf

In the sectoral union's expert assessment, employment of migrant workers was on the rise from 2016 to 2019. After that there was a break, as there was a break in the growth in the Hungarian automotive sector. Since the Covid-19 crisis, there has been a decrease in the employment of migrant workers, especially those coming from Ukraine and Serbia. A specific twist in employment numbers is that the bulk of migrant workers are temp-agency workers. They could easily lose their job and the automotive employer or user company does not even need to record this, and it has no obligations to declare mass redundancies. An intensive labour supply was typical of intermediaries in manufacturing. Thus, some temp agencies specialised in bringing in workers from an entire village in Ukraine by bus. Among migrant workers there were massive layoffs, also in the automotive industry and rehiring. Temp agencies kept contacts alive via social media and rehired them in the spring and summer of 2021. (IO0312072021) The plant-level union respondent gave a similar picture, adding that in automotive logistics migrant workers were present also before 2016. The respondent could not easily assess the number and percentage of migrant temp-agency workers before and during the Covid-19 crisis. Namely, the user company had contracts with several temp agencies, each of which specialised in bringing in workers from specific locations. During the Covid-19 crisis, the contracts with some of these temp agencies were terminated, but not necessarily with those that employed (only) migrant workers.

Employment form and working conditions. The union assessed the working and employment conditions for migrant workers to be the same as for local workers. Migrant workers are mostly employed via intermediaries, and they appear formally as employees of temp agencies. Their wage is the same, unless shady kinds of grey employment practices are occurring, in which case their net earnings can be even higher. The plant-level unionist and the regional representative also clarified practices such as when migrant workers overperform, work more working hours than is legally allowed without these being registered, and in turn receiving side payments in envelopes.

The problems surrounding the integration of migrant workers stem from their lack of knowledge of Hungarian, as they can communicate only via interpreters, and they lack knowledge about their rights. Thus, they may sign forms without sufficiently understanding the background, or without understanding information about work processes, work with dangerous materials etc (TU03HU11022021). Outside work, their accommodation depends on temp agencies, and there is a big variation in terms of the actual quality of accommodation – some is acceptable, some is highly problematic. Social relations with local Hungarian workers are potentially conflictive, as the latter perceive free accommodation and travel for migrant workers to be unjustified, and an unfair privilege. Issues of social dumping that derive from the extreme flexibility may also turn out to be a conflictive issue (TU03HU11022021). A case at an automotive logistics plant was especially acute.

These temp-agency workers, they have earned unrealistically high wages because I think … they work(ed) 13, 14 hours a day. So, in 12 hours, everyone knows that's the maximum that can be spent in the workplace. This man, as he told me, completed 13, 14 hours every day. And there were weeks I saw this … So he slept inside the company. Or I don't know how he did it. Or he slept in the parking lot. I have no idea how he did it, but he earned some very serious money. Now such questions immediately arise if there is an accident due to insomnia, fatigue. So, what happens then, who takes the responsibility? Then, what happens in relation to the user company, to the temp agency? I think the user company should pay attention to this and at least tell the temp agency to tell your man to go home, because if he is run over by a forklift, it's going to be a problem for everyone.

During the same interview (TU05HU18022021), a company-level union respondent reported a fatal case, due to immense workload and an unhealthy diet.

The [migrant] temp-agency worker, a 24-year-old kid, spent 12 hours working every day. He drank ten coffees a day, then spent five days at night, drinking energy drinks for 12-hour shifts. Until one beautiful morning, when he sat up there on the forklift, he started driving toward the truck. He was 24 years old, and then bam, he fell down. He died of a heart attack.

The role of intermediaries is extremely pronounced, as typically temp agencies are in charge, or at least occupy a central position in recruiting, selecting, contracting with and accommodating migrant workers. At plant-level user companies, these companies are typically contracting with at least two, sometimes five, temp agencies. Such an arrangement creates a highly fragmented worker community, whose specific contracting arrangements and basic integration opportunities may significantly vary. An intensive labour supply was typical, as was a focus on a target group, and thus some temp agencies were specialised in bringing in bus workers from an entire village in Ukraine (IO0312072021).

In one industrial town, during the Covid-19 recession, migrant workers were laid off in large numbers, but soon – especially in manufacturing – some were almost immediately rehired. Temp agencies were well-prepared to keep their contacts going with workers, and they called some workers back to work in 2021(IO0312072021). In such layoffs, housing is of immediate importance.

A dramatic experience for me, when it comes to temp-agency workers, is the question of their accommodation (housing). At the very moment the user company says it doesn't need the labour of the temp worker, that very moment it tells the temp agency that over the phone. And then they (the agency), within an hour, they're already communicating to the worker dormitory that today is still

paid for, but tomorrow we won't pay for that worker's accommodation. And the person comes home from the factory and is told that they have to move out tomorrow because they won't pay for housing anymore. I think that's the hardest part of it. Because I saw it, a lady was sat right here in this office who told me that a young pregnant woman was also sent off smoothly. Without a problem (TU05HU18022021).

Regulation. The union did not follow the regulation of migrant work in the country, partly due to capacity problems, partly because following and influencing the relevant legislation is considered the confederation's task.

Around 2012, the sectoral union attempted to influence the legislation and regulation of temp-agency work.

Social dialogue and collective bargaining. The union representative stated that sectoral social dialogue has not been functioning in machine manufacturing for at least for 10 years, also because the employer-delegate representatives' lack of interest in sitting down at the table to engage in social dialogue (TU03HU11022021).

Special arrangements, for example housing and travel arrangements for migrants, are handled by the user company and temp agencies, without the involvement of trade-union representatives. Company-level trade unions manage to learn more about these details only if they have members among temp-agency migrant workers who turn to them (TU03HU11022021).

Strategies. In general, the sectoral trade-union stance is to limit temp-agency work, and it finds it inacceptable that certain companies employ 50 per cent or more of their workers via temp agencies. As temp agencies recruit migrant workers, migrant workers would also be better received, and more easily approached and organised by the union, as employees of user companies. In general, the union tries to convince both migrant workers and user companies to establish a direct employment relationship. In practical terms, such an arrangement is more difficult, as user companies and temp agencies might have clauses in their contracts of not allowing for the possibility of a takeover (TU05HU18022021).

The sectoral trade union does not cooperate with many domestic trade unions, as many are competitors. It has, however, good international cooperative links, but there are no concrete contacts related to the unionisation of migrant workers. The union also has contact with relevant unions in Serbia, but not in Ukraine. The union is open, but it does not target migrant workers specifically. Only some affiliated plant-level unions organise or unionise temp-agency workers, and these workers include migrant workers. In

general, the strategy is to protect union members, including the more complicated cases of temp-agency workers and migrant workers. The union nevertheless needs to economise its energies and capacities: addressing and unionising is less complicated for the larger number of local workers, while unionising the few and complicated cases of temp-agency migrant workers is energy- and cost-intensive. This is why the union strategy is geared towards local workers (TU03HU11022021).

Organisation and unionisation in the current conditions is too difficult and demanding a task for plant-level and regional-level union representatives too. In their words, if temp-agency migrant workers are unionised, this will create a massive obligation and task for the trade union, for which the union does not have the necessary means and apparatus (TU05HU18022021).

3. Services: the retail and the HCT sectors

Capacities. The employer organisation gathers mostly large employers, but it attempts to be open to all. Such a constellation derives first from the fact that the organisation's founders were large employers, and second, that dispersed, small businesses did not have the capacities with which to participate, even at a later stage. Its capacities are modest, without specific capacities for dealing with migrant workers in the sector and focusing on the practical actions of its members.

The employer organisation does not have the capacity to collect its own data, and it is aware that even in the core EU countries equivalent employer organisations rarely have such special capacities. The organisation monitors official sectoral statistics on employment, unemployment, wages etc. It is aware of its limitations, as employer-oriented data are not available, as statistics focus on employers with at least five employees. The number of unemployed in the sector as well as average wages were not reported accurately as most employers are very small. The more focused seasonal publications and reports based on official statistical data provide the most useful data. It also follows global employment trends, including new employment forms, such as platform companies' role, and platform-mediated work in the sector.

The key trade union for the hotel, catering, and tourism (HCT) sector worked with limited capacities even before the Covid-19 crisis, and it prioritised the protection of Hungarian, full-time employees at large employers.

In the retail sector, the employer organisation does not deal with issues of migrant work (email communication with association representatives). Such a stance is likely due to significant competition among its multinational company chain members but also due to the politically sensitive topic of migrant employment in Hungary. In turn, the trade union in retail has moderate capacity, with an organisational

structure that encompasses elected officials, a few experts and regional representatives, adding up to around 20 people. It has no special capacities allocated to dealing with migrant workers, but realistically, its current financial capacities also do not allow expansion of operations in that direction. The union covers largely retail workers in many, perhaps most, multinational retail chains. Altogether there are at least six collective agreements fewer in the sector, and the union also covers fewer workplaces.

The retail union did not deal specifically with the issue of employment and the integration of third-country migrant workers, but it did appear on its agenda. It does not collect data, but rather monitors general developments, and has specific impressions regarding the approximate number of migrant workers, which are based on information from particular workplaces. A related issue is that migrant workers are so few that the cumulative wage data cannot be gleaned for them from selected employers.

Interpretation of the situation. The opening of labour markets in some core EU countries tremendously affected the sector as many HCT workers left the Hungarian labour market, including Hungarian-speaking migrant workers from neighbouring countries. At the peak of the crisis, there were about 3,000 unfilled jobs in the sector, which was estimated as making up about 10–15 per cent of all jobs. Targeting local employees from other sectors was very difficult, as the sector offered comparatively low wages (60–65 per cent of average wages), and it was not that attractive in terms of working conditions, including physical work. Hungarian-speaking workers from neighbouring countries who arrived since 2016 typically left after a few months for better jobs abroad. Following global trends, the employer organisation also followed suit with employers in core countries, where especially the more physically demanding jobs, requiring less qualifications, were offered to migrant workers. Nevertheless, the employment of third-country migrant workers, especially from Ukraine, was mostly possible only for larger employers in the metropolitan area of Budapest, where larger businesses in the HCT sector worked all year round. Since 2019 workers from more distant countries also appeared, e.g., from Mongolia. Altogether, however, the total number of third-country migrant workers remained surprisingly low (EX01HU14012021).

The Covid-19 pandemic affected the sector tremendously in a negative way, as many – if not most – jobs were lost due to lockdown and travel restrictions, including, and especially jobs for migrant workers. In general, employers found it easier to lay off foreigners compared with locals who had been employed for decades. During the pandemic, certain young foreign workers with specialised skills (confectioners, pizza makers, gyro makers) did not appear for their expected seasonal work – often students who usually arrive via the Erasmus student-exchange programmes. The reopening of the economy will once again spark the issue of not only the lack of available labour but also the lack of quality and of skilled workers. Reopening will likely draw attention to even more acute problems, as many HCT workers left the country, while the

new generation with fresh diplomas did not gain the necessary practical experience during lockdown to enter the labour market on equal and sufficient terms with their peers.

In the retail sector, the trade union observed that third-country migrant workers appeared gradually, and then there was a sudden increase when an acute labour shortage appeared, around 2017–2018. The increase was generally connected with the rise in temp-agency workers employed in the sector, but it was also linked to increased competition for workers among employers. Foreign workers, especially from Ukraine, were common in logistics, in the more hidden workplaces. With Covid-19, there seems to be an oversupply of labour, and the number of migrant workers seems to have somewhat decreased. These trends in limiting the number of employees occurred alongside increased digitalisation and automatisation, which was introduced in many retail chains.

Hungarian speakers are more visible to the union only if a highly specific issue appears.

Integration and problems. For HCT employers, including before the crisis, the employment of Hungarian-speaking migrant workers (potentially dual citizens) was smooth, and typically only once a year was there an issue that needed to be solved for that special cohort of employees. Initial integration, i.e., the contracting and the establishment of an employment relationship with third-country nationals, nevertheless posed several challenges for employers. It was perceived as a significant initial cost and investment, where travel and housing costs especially had to be covered. Thus, only a few, mostly Budapest-based larger employers operating throughout the year could afford to employ third-country nationals. Administrative issues also posed a challenge and costs, but the simplification of the regulation in 2017 made it easier to employ workers from Ukraine, Serbia and Moldova. The terms and conditions of employment were in general the same for locals and migrant workers. Special arrangements, such as securing housing, differed.

During the Covid-19 pandemic, the jobs of these migrant employees were lost, and housing arrangements were also no longer secured. Integration at work was more difficult. Compared with large employers, e.g., in manufacturing, a HCT employer such as a large hotel typically did not employ more than 6–8 employees. For such employers, securing a translator and a special service coordinator etc. was a problem.

In **retail**, at work, there was a problem with the integration with third-country nationals, mostly Ukrainian workers due to lack of knowledge of Hungarian language, which created errors in packing commodities. This occasionally caused internal conflicts between local and migrant worker (typically night) shifts. Outside the workplace, the union representative considered social security to not have been clearly resolved for migrant workers. Travel reimbursement was also a stumbling block to migrant workers' integration. As many migrant or commuting workers could not receive supplemented-reimbursed Hungarian local travel

passes, the employer typically added this amount to their salary, which then caused tensions at the workplace, and reactions from fellow workers. With the employer unable to resolve such tensions, this often resulted in migrant workers leaving the workplace. Accommodation often featured as an issue highlighting how migrant workers were dependent on intermediaries and employers. Accommodation was typically provided via intermediaries, and the trade union could not tackle this issue with the user company or employer. In one instance, migrant workers from Ukraine were accommodated in crowded container houses, close to the warehouse in which they worked. In this way, they not only endured suboptimal housing and living conditions, but their availability to work was also secured, amid a higher danger of social dumping.

Migrant workers are rarely trade-union members. Attempts at unionisation failed. This was partly due to the unionists' lack of language knowledge (communication was via Google translate), and partly because of no interest generally shown by workers in joining the union. Migrant workers were open to receiving assistance and help, but as they were trying to save as much money as possible and send it home, they were definitely not interested in paying a membership fee.

Employment forms. In the HCT sector, workers who were third-country nationals typically filled the more 'physical', low-skill jobs, such as cleaners and maids. Those working as receptionists had to complete multiple tasks. They worked in pairs and at least one was supposed to speak Hungarian.

In terms of employment forms, the hiring of third-country nationals was tied to their residence permit, and thus this could not last for more than for 2 years. Employment via intermediaries was significant, via temp agencies but also via student and retirement cooperatives. Seasonal employment through temp agencies was common especially in certain HCT subsectors such as hotels and spas.

Informal or semi-legal employment was common in the sector: there were many third-country nationals, with many employment irregularities discovered by inspectors. Such shady employment arrangements does not seem to be more typical for migrant workers than for locals (EM01HU23022021). Data from the labour inspectorates mostly confirm this thesis. At the peak in third-country employment in 2019, legal inspectors found that two-thirds (67 per cent) of all inspected employees had irregularities in their employment. In the subgroup of inspected HCT third-country-national workers (149 employees, 2.7 per cent of all inspected employees in HCT), the rate of irregularity was 72 per cent. These statistical irregularities are due to a lack of, non-valid or expired work permits, an issue that directly affects not only employers but also employees. The highest number of irregularities among foreigners was found in 2017, when the new rules were introduced.

In **retail**, according to the trade-union representative, migrant workers were almost exclusively temp-agency workers. Their employment in some multinational retail chains was limited to some jobs that did not require language skills and were not visible to the public, as in logistics. In terms of platform-based services, such as online ordering, these jobs were also not filled by migrants, but by workers who spoke Hungarian fluently. In small retail shops, informal and shady employment was also common, similar to local common practices (EX04HU24062021). The union representative believed that career development in the workplace for migrant workers was possible, but that it required exceptional talent.

Intermediaries. Temp agencies were instrumental in bringing in migrant workers, especially from Ukraine, but also from other countries later too. HCT employers cooperated with temp agencies who aided all with mediation, advice and service provision, which was initially made possible via a government-sponsored programme. Typically, this was commoner among larger employers without the involvement of the employer organisation.

The increased role of intermediaries such as platform companies became visible during the Covid-19 pandemic. These platforms both took a percentage cut from incomes in the hotel subsector, but they moved to restaurants too. Compared with pre-pandemic times, the increase in acquiring platform-based courier services entailed new costs to restaurants, which typically had to downsize their employee base. There is, however, no available data – only the records of the increased turnover of work that was mediated by platform companies.

In retail, the presence of temp agencies was pronounced. However, due to cost-sensitive considerations, many user companies in retail tried to find their own direct niche through which to employ migrant workers directly and escape the costs of intermediation, although it did involve all the processes of recruitment, selection, contracting, accommodation etc.

Regulation. Via their national-level umbrella employer organisation, the HCT employer organisation followed changes in regulation, recommendations for amendments, and in general positively evaluated the simplified employment of third-country nationals. However, for third-country nationals, the seasonal character of their employment could not work out as a sustainable arrangement, because the costs of their initial employment (e.g., reimbursement of travel costs) were too high.

Social dialogue and collective bargaining. Social-dialogue committees in the HCT sector have also operated over the last five years, and joint statements have been released covering the two autonomous parties. The issue of migrant work was not discussed. At best, the issue of migrant-worker employment critically discussed by the trade union, as a threat towards standards and the social-dumping cards used by some employers.

There is a sector-wide collective agreement in the HCT sector, which was regularly amended in cooperation with the trade unions after changes in legislation. There were, however, no special clauses related to migrant workers, nor were these discussed. There was no information available on whether the issue of migrant-worker employment and integration featured during single-employer collective bargaining at some workplaces.

In **retail**, sectoral-level social dialogue is functioning, but it has not dealt with the issue of employment and the integration of migrant workers. During the pandemic, exchanges have been limited to Zoom meetings, and the interactions have been shallower.

During company-level collective bargaining, the issue of migrant workers' employment and their integration did not feature on the agenda. However, in the words of the union representative, when the employment of migrant workers is raised with representatives of employers, they usually back out of continuing a conversation. In crisis years, the union strategy has been to secure employment for locals and not migrant workers.

While in general there are no provisions for collective agreements that deal with migrant workers, *or the special needs of worker cohorts (such as religious holidays), in some workplaces the collective agreement entails a special clause that regulates under different conditions the reimbursement of work-related travel costs for non-local migrant workers.*

Strategies. As best practice, in HCT many employers who employed third-country nationals, i.e., those specifically skilled in providing good-quality services, such as workers from Thailand or Vietnam working in tea houses in Budapest, recognised the improvement in the quality of their overall hospitality services, and thus built-in an advantage over their competitors. In exchange, these third-country nationals received stable and good employment. Moreover, these workers also seemed to socialise in and outside of their workplace, interacting and participating in jointly designed public and community events.

In general, the employer organisations' view is that the HCT sector is a highly globalised, international sector, and to remain competitive with respect to the quality of services provided, it needs to be open to all practices and to respond to innovative global trends, also in terms of the employment of migrant workers. Due to an increasing diversity present in the sector, there is little space or ground for racism of any kind.

In **retail** a clear strategy is directed towards protecting the interests of and providing services to core, insider-employee members. The union rarely organises and unionises temp-agency workers, as their employment relation is more complicated. The union also knows that temp-agency workers are more dependent and precarious, and that the union cannot provide sufficient assistance and help. As migrant workers are more likely to be temp-agency workers, the union seems to pay even less attention to this dually precarious group of employees.

Although migrant workers are not in focus, via international cooperation the union receives information about common employment forms and working conditions in the 'sending' countries from trade unions in the region, which is possible via membership in the international union organisation Uni Global. The union clearly sees that even the services and activities it would like to provide and fulfil are not fully covered. It does have a vision of how to deal more with migrant workers in the future, if circumstances allow. A related capacity-building strategy for the union could be to create an international-officer position. This person could also be in charge of migrant workers' unionisation, and could provide or broker assistance either in Hungary or in the 'sending' country. Another possibility is to expand capacities temporarily, via concrete projects and associated funding.

More generally, the HCT sector has assumed a pioneering role in quickly adapting its operations to the conditions of the Covid-19 crisis. The HCT sector has not only systematically adjusted all its operations according to hygienic etc. standards, but it has also monitored changes and disseminated practical knowledge. There was not only evaluation and control, but also constant internal education present in the sector. The HCT sector seems to have become a role model for other sectors. The retail union has also recently dealt with the effects of digitalisation and automation, which may be of relevance and may affect

the work and employment of migrant workers. Platformization also appears, especially in terms of recording customer satisfaction for online ordered shopping and delivery. However, workers affected by customer satisfaction typically do not seem to be migrant workers.

In terms of **recommendations**, the union representative sees a potential role for non-profit organisations in informing migrant workers about their rights and regulations, and directing them to or linking them up with the relevant authorities. The interviewed unionist also saw a clear line between improving the capacities of inspectorates and enforcement and preventing potentially labour exploitative practices from occurring among the most vulnerable groups of migrant workers (TU01HU04022021).

4. Healthcare

Capacities. We contacted a registered employer's representative organisation in the hospital sector that deals with the issue of the migration of both physicians and nurses, but an interview was not possible. Both analysed unions have moderate capacities, especially the trade union for physicians. This union's membership is open to all with proven professional qualifications. It has currently 3,600 active members, physicians and dentists, who mostly work in public-, state- or municipality-owned healthcare establishments, including those working as individual entrepreneurs, but also professionals working in the private sphere. Up until recently, most members, around 2,200 of them, had a status as a public-service employee, which was lost due to changes in legislation as of March 2021. The union has a presence in more than 100 workplaces, in both outpatient and inpatient care, or mixed, in 84 state-owned establishments, but in only 24 places is there a formally organised group (TU06HU04062021). It is still a growing organisation, and it has attracted the bulk of its members in recent years.

The union of nurses was representative, i.e., it was eligible for collective bargaining. It gathers members from 109 other establishments, both in healthcare and social care. The union of physicians has not yet reached the representativity criteria to enter collective bargaining, and it does not have information on what level of coverage unions have. All collective agreements were declared null and void in February 2021. Healthcare workers are not eligible for collective bargaining and agreements according to new legislation (Horváth and Kártyás 2021).

Whereas both unions keep up with the general statistics, according to the representative of the physicians' union, the general annual data are not precise, as they do not record the number of physicians who are commuting or working in another country and not only Hungary, or those who are still registered, but have actually left the country. The physicians' union also did not record whether members' diplomas had been

recognised (nostrified), and whether each member had finished their education in Hungary or elsewhere, as only the place of birth appears in statistics. (TU06HU04062021) Both unions have a few paid independent staff, and they rely heavily on the work of activists, especially the union of physicians. Neither trade union disaggregates its membership data according to country of birth or place of origin with respect to qualifications gained. The unions are not monitoring changes and developments regarding the prospects of non-local professionals.

Interpretation. Both unions are aware of a general lack of medical workers and issues concerned with their immigration; however, less attention was paid to professional emigrants. The nurses' union was also involved in a project on the migration of healthcare workers, but this project focused primarily on immigration, and not emigration. The nurses' and social workers' union's experience is that the migrant workers who finish their studies in Hungary mostly remain (TU02HU08022021). Thus, education is a major route to socialisation both in society as well as in the professional community. The interpretation of the official statistics from the respondent based at the other union was that emigration slowed down in 2016–2017 due to somewhat rising wages. However, emigration is still present and is not carefully monitored. These few conversations suggest that the likelihood of foreign-born physicians migrating is higher, but that return migration might also occur, especially from neighbouring EU countries, such as Romania. The main driver of migration is higher wages and new professional challenges.

In terms of integration issues, foreign-born physicians had some problems at the start of their career, as they were typically employed in hospitals on the periphery of the country. One potential issue is that both unionists reported what appears to be the (non-)recognition (nostrification) or absence of specialisation exams, irrespective of the number of years spent in healthcare. These directly affect wage categories for healthcare workers, especially physicians. If a person does not pass the specialisation exams, they can be stuck in the low-middle region of the wage-tariff category, unable to climb the wage ladder. An additional issue, at least for nurses, is insufficient knowledge of Hungarian language: even those who obtain their diploma in Hungary do not receive Hungarian language classes. Finally, the anti-migrant atmosphere in the country probably does not make it easy for healthcare professionals to settle in Hungary (TU02HU08022021). Problems were typically solved individually, and not via trade unions (TU06HU04062021).

Third-country nationals were more likely to have fixed-term employment contracts, which was due to their dependence on fixed-term residence permits (TU02HU08022021). Surprisingly, temp-agency work is very much present in the sector, but it is less common among foreign-born or third-country nationals. The new legislation aims to curtail the proportion of temp-agency work in this sector. Temp-agency work has been

popular in recent years, especially among physicians, because healthcare workers could earn higher net incomes through entrepreneurial contracts. Quite surprisingly, physicians with a specialisation are more likely to be temp-agency workers, whereas all physicians start as public-sector workers, although more recently there has been a special healthcare employment relationship due to the aforementioned legislative changes, and such relations are not more common among foreign-born or third-country nationals (TU06HU04062021).

Regulation. Neither trade unions followed the regulation related to employment and specific legislation affecting third-country workers in Hungary, nor did they know the specific regulations. The unions also did not have any records of discriminatory practices towards foreign-born medical professionals. There were two concrete recommendations: first, to introduce and provide Hungarian-language courses to non-Hungarian-speaking health professionals, and second, to overview and evaluate the wage and tariff system, regarding how it affects migrant workers (TU02HU08022021).

Social dialogue. Until 2021, when collective bargaining was still possible, questions related to the employment and integration of foreign-born, or third-country migrant workers were not posed as part of the sectoral social dialogue or establishment-level collective bargaining (TU02HU08022021). One of the unions could not always participate due to not meeting the representativity criteria at the establishment level, and this union was not present in any of the sectoral-level forums (TU06HU04062021). In collective agreements, which were valid until early 2021, there were no special clauses related to foreign-born or third-country-national workers.

Still, in establishments where collective agreements existed, the new local-establishment-level regulation brought in clauses that were present in those collective agreements in individual contracts too, whereas in others managerial unilateral decisions seemed to prevail more often than before (TU06HU04062021). Finding affordable local housing for non-local healthcare workers as a specific arrangement was not on collective-bargaining agenda until 2021; it was in the hands of local, mostly municipal bodies, that designed applications to attract healthcare workers.

Strategies. Neither of the trade unions developed specific strategies regarding the employment and integration of foreign-born and third-country-national workers. However, both unions were open to all healthcare workers, irrespective of their origin. Not surprisingly, both unions had foreign-born members, but they could not determine their number and percentage share. One union also reported active members, both among Hungarian and non-native Hungarian-speaker physicians. It seemed that healthcare workers are quite well-integrated as their background was ‘invisible’ to union organisers, but more negatively, their

specific problems and issues also did not reach a critical threshold for unions to act. A partial explanation here is that healthcare workers' problems are so acute, and they overshadow all other issues. Therefore, it seemed logical for both unions to design only general strategies affecting all healthcare workers (such as changes in legislation, remuneration, and working conditions), while also being very inclusive in terms of their members.

Both unions engaged in international cooperation with other unions in the EU, but not those related to foreign-born migrant workers (TU02HU08022021).

5. Platform work

Capacities. There are no trade unions or employers of platform-based companies. Neither platform companies nor locally organised taxi companies are the official employers of drivers, only of dispatchers. Drivers are either contracted as independent service providers, wherein the drivers must pay either a fixed monthly fee or a percentage of total income. However, these taxi companies are at the top of the service-provision chain, i.e. they control the chain. Officially, cab drivers have some trade unions, but these have a double problem, as they are usually tied to one specific taxi company, and these unions unite individual small driver-entrepreneurs, and not employees.

There was, however, a trade union that functioned until 2015, and that gathered drivers from all taxi companies. One of its founding members, who also established an online forum for taxi drivers, named Halló Taxi, recognised along with his colleagues back in 2005 a need for online communication and self-organisation at that time. The site and the trade union were close allies, and they backed joint regulatory initiatives for the Budapest taxi market around 2011. They also organised various demonstrations to regulate the taxi market, including challenging the appearance of and demonstrations against Uber in 2015.

Interpretation. Third-country-national migrant workers were and are relatively few among cab drivers, but there are at least a few at the main platform company, Taxify-Bolt. Historically, there were never many migrant workers, and they arrived in waves. They either became integrated in the early 1990s, or, more alarmingly, they arrived tied to employers in the early 2000s, who employed them but also secured housing in a socially highly problematic way, which thus pushed down the cost of transport.

The number of drivers stagnated until Covid, while the Covid-19 crisis decreased the market and the number of drivers to about 30 per cent of the number before. Many fleet companies went bankrupt, and fewer non-

independent drivers remained active. Fleet companies were only able to offer a lower rental price to the drivers, but in general this did not help (WK02HU02062021).

Employment forms and working conditions. In general, taxi companies attracted various social groups as they seemed to offer an easy and good income. The reality of gaining employment, or more precisely, engaging in economic activity, however, was constrained by two opposite forces. On the one hand, the new regulatory framework significantly increased the threshold for entering the market as an individual entrepreneur: there were high criteria regarding car design, (see Réti 2014; Meszmann 2018) Simultaneously, the threshold for working as a driver-employee increasingly lowered. To become a taxi driver, one only had to pass a test, and there was no limit to the issued number of taxi-driver permits (although this was lobbied for by the taxi-drivers' trade union). One of the negative effects of such a low threshold was a very high turnover among drivers with marginal employment contracts. In addition, as intermediary companies that owned fleets entered the market and found a position for themselves between taxi companies, especially the platform companies and individual drivers renting out cars for interested drivers. These fleet companies operated 50–100 cars and worked with a similar number of drivers. They had contracts also with the platform companies Taxify-Bolt and Uber. Such a constellation, in which fleet companies increasingly dictated the terms, revitalised a race-to-the-bottom kind of competition, wherein most independent drivers felt that they are 'eating up' the value of their car, as net incomes were insufficient to cover expenses, maintenance and new investment, while also earning a subsidy-level income.

In terms of employment forms, less than half of the drivers are independent individual entrepreneurs who drive and operate their own cars. Roughly one-half are employed by fleet owning companies, which have a contract with platform companies or taxi companies. In the latter case, for which migrant-worker employment is also more likely, fleet companies offer minor employment contracts, typically offering two-hour contracts per day. However, as the fleet companies also rent out their cars to taxi drivers for a fixed price, and platform or taxi companies take 20–25 per cent of the total income, these employees are actually forced (or incentivised) to work 12 hours or more per day, to pay the two rents and to earn their net income. Furthermore, to decrease tax obligations, these drivers are also forced or incentivised to cheat, and record fewer kilometres driven than is actually the case. According to the informant with whom we spoke, the only positive feature of employment via fleets and via platform companies was to have a probation period, so that an aspiring taxi driver could test out this increasingly digitalised profession (WK02HU02062021).

For platform work, such as with Uber and later with Taxify-Bolt, entering the drivers' market was even easier, as one no longer needed specialised local knowledge, as the software provided the drive with all

information needed. All taxi companies started to use such software, but the software of Uber and Taxify-Bolt was superior.

Shady jobs in intercity car-sharing platforms seemed to be entrepreneurial in kind, and when done on a smaller scale, it required a rather sophisticated division of labour and complex skills. Owning a driving licence, and preferably one's own car with a Hungarian registration, was a precondition, which was not an easy entry barrier. In addition, knowledge of various regulations further decreased the likelihood that non-integrated foreign-born workers could take up such entrepreneurial jobs. Drivers were required to know how specific platforms (Oszkár, BlaBlaCar, Facebook) operate, and how to use it. In short, the threshold for non-integrated entrepreneurial workers, with sufficient knowledge as well as social networks, was too high for migrant workers or non-integrated third-country nationals. According to our informant's assessment, besides him, there were consequently very few non-local workers in this specific subsector.

In the border regions with Serbia or with Ukraine, employment opportunities for full-time, well-paid jobs are rather limited. A well-integrated male worker in his thirties with a university degree, who both finished his studies and obtained Hungarian citizenship almost ten years ago, found rather precarious employment opportunities in the region, including part-time work mediated via temp agencies. He also tried his luck as a small-scale entrepreneur. He was well aware of the local practice of semi-legal employment, which consisted of registration for a certain number of hours, supplemented by additional under-the-table cash payments, so as to increase net earnings. All these specific skills and knowledge eventually helped him accept an offer for an unregulated earning opportunity as a driver for an intercity car-sharing platform.

Whereas the precise job seemed to be simple (driving a car) and the income relatively high and easy to earn, the precise working conditions, skills needed and risks associated with it later portrayed a different picture. The organisation of work and work processes were rather complex, and the job included good communication and language skills, organisational skills, conflict management, but also a high intensity of work and necessary adjustments to flexible work arrangements. The net incomes were relatively high. However, the risks ranged from the stress of resolving unprecedented situations to dealing with timing, car repairs, finding replacements and even road accidents. The social costs and skills that the job necessitated were quite high. Altogether, the employment was an entrepreneurial activity with a self-directed job, which rather quickly turned out to be underpaid, given all the related risks.

Regulation. The intercity driver-worker respondent quit this semi-legal economic activity after a year or so, still before Covid. He outlined his wish to enter the field professionally and legally again in the future. This outline resembled how city-level cab transport is organised in Hungary, with the market organising companies that employed dispatchers. Their subcontracted drivers were at best loosely contracted service personnel (W01HU10052021).

The cab-driver activist asserted that the moderate victory of regulating the cab market with fixed tariffs still informs the necessary direction of action, especially for (independent) taxi drivers. Such regulatory moves – and later ones – constrained the level-playing field for Uber and Taxify-Bolt. However, the drivers were not able to limited the number of licenced drivers, so as not to create too much competition and a race to the bottom. Platform companies did highlight both the need for fixed-tariff systems, but also the limited number of issued driver permits. Platform companies increased the labour pool, by creating a lower threshold for entrance, and they invented a cheaper service through tech innovation. The regulation was a response to these processes, but it stopped halfway (WK02HU02062021).

Social dialogue formally exists at city level, but there is no real channel for the representation of interests, especially not among cab drivers.

Strategies. Organising taxi drivers, including those working via platforms, irrespective of whether they are migrant workers or not, happened via online communication. The activist with whom we spoke considered the role of the online forum to be very important, but he also asserted that Facebook killed the online forum. A more important structural challenge for the organisation, including that of (non-)local workers, was negative selection taking place in the taxi-driver community. This informant thus contended that earlier he would organise social events, but currently the quality and level of exchange leads him to only interact with old friends and colleagues (WK02HU02062021).

VII. Conclusions and recommendations

The main regulations for the employment and labour-market integration of migrant workers who are third-country nationals has been protectionist, rigid and restrictive. As a rule, there are heavy restrictions on employing foreign nationals: there is a restrictive quota system, and foreigners are only allowed to be employed in professions for which there is a labour shortage. Pressing labour shortages were present in 2016, which resulted in new governmental decrees and rules making seasonal employment available and offering a regulatory window for employing third-country nationals more easily, especially for citizens of Ukraine and Serbia. Since 2016, this regulation has changed somewhat to permit the easier employment of

third-country nationals. Governmental decrees and amendments to legislation in 2016 and 2017 lowered the administrative burdens on employers and provided access to seasonal work without a permit to citizens of Ukraine and Serbia. In July 2021 the Government issued a decree (no. 407/2021.) that extended and made it easier to employ third-country nationals in Hungary during the Covid-19 emergency period via temp agencies.

The legislator does not deal with the social, cultural or economic integration of foreigners (including migrant workers), and it instead stresses policing and security issues. Social partners only follow the relevant regulation intermittently, and they are not involved in monitoring and changing it. Both social partners, but especially the trade unions and the union confederations, have been sidelined from consultations over the relevant regulation.

Regulation has made the pattern of employing third-country nationals on temporary contracts stronger. The available statistical and survey data do not portray the numbers and labour-market position of third-country-national migrant workers adequately. The overall data quality is not optimal; there is limited access to data and available funding for migration research is highly limited. We need more data on the labour-market positions of migrant workers.

Administrative stock and flow data, disaggregated by sectors, show that the Hungarian economy is increasingly reliant on migrant workers and their labour; however, the data also demonstrates the typically circular and temporary nature of employment and of migrant workers' labour-market integration. During the first wave of the Covid-19 recession, migrant workers were among the first to lose their jobs. Since the summer of 2020, migrant workers have again been employed in large numbers at many sites. The number of work permits and registrations have been increasing since 2016, but this number fell dramatically in spring of 2020, during the few first months of the Covid-19 crisis. Only in retail did registered work permits or employer registrations grow continually. Employment of third-country nationals also occurs on the periphery of the labour market, among the more vulnerable social strata, such as young people, via student cooperatives. Irrespective of citizenship, students enrolled in tertiary education can work up to 20 hours a week and an additional 60 days full time during the summer break.

Experts pointed out that Hungary does not have a transparent economic and labour-market policy, or an adequate infrastructure to deal with the labour-market integration of third-country nationals, especially non-Hungarian speakers. The issue of third-country migrant workers (referred to as 'guest workers' in the official discourse) emerged amid acute labour shortages in Hungary, especially since 2016, in a highly politicised atmosphere, after the official hostile response to the migration crisis of 2015. Alongside the current government's anti-migration propaganda, they have pursued a non-transparent migration policy,

with occasional state-sponsored projects focused on support for temporary work agencies and strategic partnerships with enterprises geared towards making it easier to employ third-country nationals. Our media analysis has underlined how politicised the topic of migration is: in our sample, the pro-government media were completely silent on the issue of 'guest workers', whereas the liberal and critical media reported on the topic quite extensively. Interviewed experts underlined that migration is a difficult topic for Hungarian society, and an ongoing social trauma, i.e., it is a situation that needs to be dealt with, and supported with informed discussions.

Jobs offered to third-country migrant workers are typically not based on standard employment contracts, and contracting occurs via intermediaries (i.e., temporary work agencies or student cooperatives). These jobs usually do not require knowledge of languages, and they are relatively hidden from the public gaze. The contracts are fixed term; in services or construction they are also often part time, do not pay well, and entail extended, (officially) unpaid working hours. Informal or shady contracting has been more common in labour-intensive sectors that are also highly cost-sensitive, such as construction and small businesses in the fields of retail, tourism and hospitality. In construction, manufacturing and certain retail segments (e.g., logistics), there has been an increasingly heavy workload with poorer working conditions dominant (cf. Hárs 2015).

For migrant workers, social conditions – and especially the housing crisis – create highly unfavourable general conditions for longer-term life-planning. Many migrant workers planned to work for a fixed-term period only, hoping to earn as much as possible in a short time and then move on. However, their precarious social-security status, the information deficit and lack of knowledge of Hungarian have all intensified workers' dependency on employers. In general, migrant workers' presence in the Hungarian economy is uneven. They have been 'inserted' rather mechanically in certain sectors, among certain (privileged and strategically important) employers, and they have been present in larger numbers during seasonal peaks in business cycles. Covid-19 has brought to the fore the precarious position of migrant workers: many were fired, while many who were infected did not receive treatment.

The significance of temp-agency work in employing the much-needed migrant workers and 'inserting' them into the Hungarian economy has increased massively over time, as they filled the gap in employer-requested flexibility, especially for seasonal workers. The restrictive and complicated nature of granting a work permit or residence permit gave temp agencies a comparative advantage, as they could specialise in and take on the massive amount of administrative paperwork, recruitment etc., both relieving employers of this task and providing services to workers. Temp agencies' role as intermediaries entailed workers' minimal integration into the labour market by securing employment contracts, but also a higher dependency on employers with

increased risk of exploitation. For services and platform work in the capital and larger university towns, employment through student cooperatives was one avenue of employment that third-country nationals could pursue.

Social partners have modest to low capacities for dealing with special groups of migrant workers and their integration into workplaces and the wider labour market. Relatedly, social partner organisations did know relatively little about migrant workers, and their integration problems. Here, civil society organisations as well as experts and professional translators offered a quick glimpse into the labour-market integration problems of migrant workers. They experience huge difficulties stemming from lack of knowledge of Hungarian and information deficits. CSOs could remedy only a small number of the information problems – as they were dealing mostly with students in Budapest. However, they did register illogical and unjust procedures, as well as huge dependencies from the employers for their supported clients. The CSOs did not have contact with the social partners, but at best, with individual, good employers.

Social partners were not invited to help to design economic policy, and they do not have sufficient involvement in regulation. As recent research and data on third-country-national migrant workers is insufficient, social partners have typically also not been informed about the problems migrant workers face, and the issue of migrant workers' integration was not on the collective-bargaining agenda. Our research has indicated that the capacities of both social partners, on both the national and sectoral levels, especially those of trade unions, are very modest. Employers' organisations, except for organisations of temp agencies and temp agencies themselves, also did not have specialised staff, or their own dataset dealing with the employment of migrant workers. Overall, social partners interpreted that the main reason for labour migration is a labour shortage, and demographic reasons as well as problems in the education system and emigration from Hungary have contributed to an increased need for workers from third countries.

Social dialogue and collective bargaining have not dealt with employment and integration. At best, this issue was raised as a comment, or side issue in discussing labour-market challenges at VKF, the national level forum. Collective bargaining has generally atrophied over the last five years. In turn, the role of specific solutions, typically brokered via intermediaries, such as simplified and fast-track contracting, and securing accommodation for large groups of migrant workers, has grown in importance. Social dialogue is very shallow – national-level consultative meetings are rare, and social partners do not have any direct influence over regulation. At best, as with the employers' organisation initiative, the government picked up and started a regulatory process to remedy acute labour shortages. Social partners, neither unions nor employers (besides temp agencies and intermediaries), focus on monitoring issues related to the

employment of migrant workers. Among the trade unions, there is an observable divergence in terms of will and capacity to deal with migrant workers, with some but limited interest in most of the sectors studied.

The general strategy of social partners seemingly entails acknowledging the increased and continuous presence of migrant workers in the Hungarian labour market. However, no specific strategies have been designed, and especially not from trade unions. Most acutely, as the unionist from the construction sector stated, the unions even lacked the capacities to protect local workers, and thus the issue of the protection and integration of migrant workers appeared to be a massive, paralysing challenge.

What is most alarming is the experts' critical assessment of Hungary as a 'transit' country with temporary and circular migration, as this assessment appears to be a self-fulfilling prophecy. Deeper labour-market integration of migrant workers is not at all supported, with only temporary, fixed-term stays for employment reasons. This standpoint is politically accepted and voiced, and as such, interestingly, it is accepted among social partners, including among trade unions.

Recommendations

The regulations on third-country nationals' employment must be revised to remedy the uneven, non-transparent and unfair employment policies. Social partners should be involved and consulted regularly throughout the process.

- Economic policy and migration should be broadly discussed at social-dialogue forums, involving civil society organisations, experts and social partners.
- Social dialogue should be resumed at multiple levels, and it should tackle the conditions under which third-country nationals are employed, including these conditions' social, economic and political aspects.
- Support measures for the labour-market integration of migrants, including Hungarian-language courses and the creation of social spaces for interaction and information sharing should be provided.
- The work of labour inspectorates should be strengthened by pointing out migrant workers' vulnerabilities in the workplace, including at the level of the national labour market, to combat social dumping and unfair competition.

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