

LABOUR INCLUSION OF TUNISIAN AND MOROCCAN CITIZENS IN ITALY.

Analysis of the Construction and Mechatronics Sectors in the Regions of Veneto, Emilia-Romagna, and Lombardy

INTRODUCTION

In 2023, Italy experienced significant employment growth. Compared to the pre-pandemic period (2019), total employment increased by nearly 500,000, marking a 2 per cent rise. This growth impacted both the female (+215,000) and male (+256,000) workforce.

However, due to the ongoing demographic trends, such as population ageing and declining birth rates, many sectors are now struggling to find labour force. According to the latest ISTAT data, job vacancies have in fact risen: on the one hand, in the fourth quarter of 2023, the job vacancy rate (2.4 % across all economic activities) saw a marked increase compared to previous quarters; on the other hand, the demographic analysis of workers shows that 25 per cent of the workforce is at least 55 years old and is nearing retirement.

States now see migration as a way to counter demographic decline and support their economies. Various initiatives have been launched to achieve this goal. In this respect, the International Organization for Migration (IOM) has developed and promotes the (SMPs) model.¹ These partnerships are typically

bilateral or multilateral agreements between States, which may vary in form, mode, and level of stakeholder involvement; notwithstanding such differences, they focus on skills as the core of their efforts and activities. SMPs are characterised by formal cooperation between States; multi-stakeholder involvement; training; skills recognition; and migration/mobility.

Similarly, the **European Union's (EU) Talent Partnerships** are one of the key initiatives on regular migration pathways envisaged in the New Pact on Migration and Asylum.² They aim to address skills shortages within the EU and strengthen mutually beneficial cooperation on migration with third countries.

These are "tailored" partnerships developed in collaboration with specific countries and key regions, interested Member States and other stakeholders.

Providing safe and regular migration pathways is considered a key priority by the European Commission. In addition to the efforts to tackle the root causes of irregular migration, such as combating smuggling, supporting refugee populations, and funding migration management infrastructure, the EU Talent Partnerships offer people the opportunity to

¹<https://eea.iom.int/sites/g/files/tmzbd1666/files/documents/Skills-Mobility-Partnerships-Infosheet.pdf>

²https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/promoting-our-european-way-life/migration-and-asylum/pact-migration-and-asylum_en

live and work legally in the EU. They also help mitigating labour market pressures caused by shrinking workforce and skills shortages that cannot be fully addressed by activating the national workforce. Additionally, they ensure equal advantages for all parties involved, including partner countries, business communities, and people participating and benefiting from partnerships.

One of the initiatives using the IOM's Skills Mobility Partnerships model and the EU's Talent Partnerships framework is “*Towards a holistic approach to labour migration governance and labour mobility in Italy and North Africa – THAMM Plus*” project.

THAMM Plus is a trans-regional programme, funded by the European Union and implemented by IOM, in Italy, Morocco, and Tunisia. It aims to facilitate the mobility of re-skilled and trained workers to address the labour shortages jointly identified by the authorities of the three countries involved. At the same time, the Project helps strengthening protection mechanisms for migrant workers throughout the entire migration cycle.

In line with Italy's most recent regulatory changes in support of labour mobility from third countries, particularly those outlined by Article 23 of Legislative Decree 286/1998 – the so-called TUI – Consolidated Immigration Act – THAMM Plus fits within the renewed vision that the Italian Government promotes on several fronts, including the “Rome Process”, the Mattei Plan, and, not least, the Italian G7 Presidency. The Project aims to contribute to sustainable development for all parties involved by providing skills development opportunities for workers, enhancing their employability both in the national and foreign labour markets, and contributing to the development of both origin and destination countries.

THAMM Plus entails two mobility schemes targeting two sectors prioritised by all parties involved and two communities with a long history of migration to Italy. The first scheme involves 2,000 workers from Tunisia in the construction sector; the second sees the employment of 500 workers from Morocco in the mechatronics sector in Italy, who will be employed in companies in three Italian regions, namely Lombardy, Veneto, and Emilia-Romagna.

This research brief analyses the presence of the Moroccan and Tunisian communities in Italy and in the three specific regions involved in THAMM Plus, as well as their roles in the construction and mechatronics sectors as targeted by the Project.

1. TUNISIAN AND MOROCCAN IMMIGRATION TO ITALY

1.1 Demographic data and geographic distribution

MOROCCO

There are 415,000 Moroccan citizens in Italy (2023), representing 8 per cent of the foreign population residing in the country; they are the third largest foreign community after those from Romania and Albania (figure 1).

Nonetheless, it should be noted that between 2013 and 2022 over 240,000 Moroccan citizens acquired Italian citizenship. Assuming that most of them still reside in the country, these individuals are now classified as “Italians of foreign origin”.

This study relies mainly on ISTAT data and therefore it refers exclusively to workers with foreign citizenship.

Fig. 1: Moroccan citizens residing in Italy, 2023



Resident pop.
415,088
(8% of foreigners)

FLM elaboration on ISTAT data

Among residents with Moroccan citizenship in Italy there is a male majority (54%). Analysis of the historical data since 2013 reveals a decline in the number of Moroccan citizens in the country. This decrease (-9.1%) is mainly due to two factors: the decline in new arrivals, and the previously mentioned acquisitions of Italian citizenship (table 1).

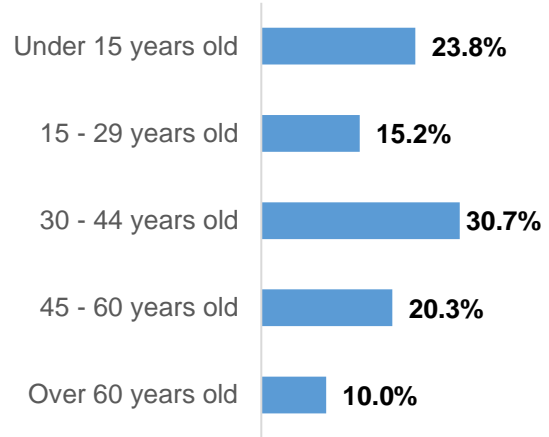
Tab. 1: Moroccan-citizen residents by gender, 2023

Gender	Residents 2023	Distrib. %	Variation 2013-23
Male	224,516	54.1%	-9.8%
Female	190,572	45.9%	-8.4%
Total	415,088	100.0%	-9.1%

FLM elaboration on ISTAT data

In terms of age groups, the Moroccan population in Italy is relatively young: nearly a quarter (23.8%) are under 15 years of age, compared to the national average of 14 per cent in this age group. Conversely, only 10 per cent of Moroccan residents are over 60 years old (figure 2).

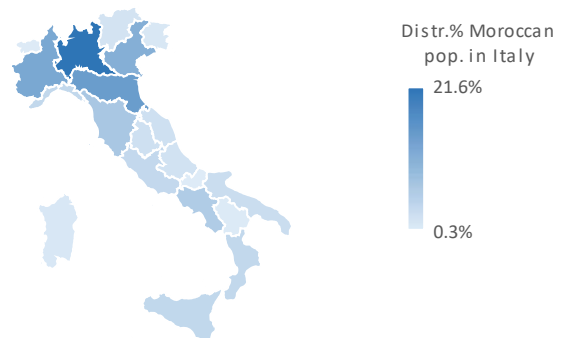
Fig. 2: Moroccan-citizen residents by age group, 2023



FLM elaboration on ISTAT data

The geographical distribution shows a concentration in the northern regions, clearly linked to the characteristics of the labour market. Specifically, 22 per cent of Moroccan citizens in Italy reside in Lombardy, followed by Emilia-Romagna (14%) and Piedmont (12%) (figure 3).

Fig. 3: Distribution of Moroccan-citizen residents by region, 2023



FLM elaboration on ISTAT data

TUNISIA

There are 102,000 Tunisian citizens residing in Italy, and they represent the fifteenth largest foreign community, accounting for 2 per cent of the foreign population in the country (figure 4). The analysis shows a significant number of Italian citizenship acquisitions, with around 27,000 Tunisians obtaining Italian citizenship between 2013 and 2022.

Fig. 4: Tunisian citizens residing in Italy, 2023



Resident pop.
102,422
(2% of foreigners)

FLM elaboration on ISTAT data

This is a predominantly male population (62.7%). The historical data shows an increase in their presence over the past ten years (+4.8%), a trend confirmed by the number of residence permits issued in 2023 (nearly 6,000, compared to 3,000 in 2013), (table 2).

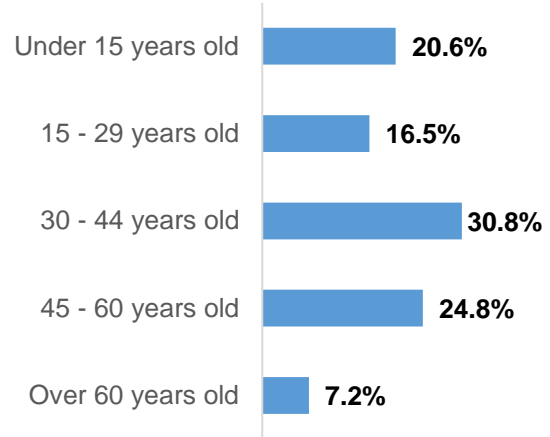
Tab. 2: Tunisian-citizen residents by gender, 2023

Gender	Residents 2023	Distrib. %	Variation 2013-23
Male	64,226	62.7%	+6.8%
Female	38,196	37.3%	+1.6%
Total	102,422	100.0%	+4.8%

FLM elaboration on ISTAT data

Tunisian citizens residing in Italy are predominantly "young": only 7 per cent of the total are over 60 years old; 72 per cent are of working age (15-64 years), and 20.6 per cent are under 15 years old (figure 5).

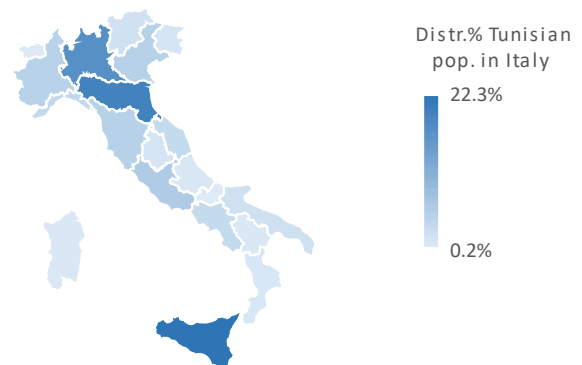
Fig. 5: Tunisian-citizen residents by age group, 2023



FLM elaboration on ISTAT data

Fifty-four per cent of Tunisians reside in Northern Italy. However, the largest concentration is in Sicily, which is home to 22 per cent of the Tunisians residing in the country. This is followed by Emilia-Romagna (20%) and Lombardy (17%), (figure 6). Sicily's prominence can be attributed to historical reasons, geographical proximity, and the demand for labour in specific sectors (e.g., agriculture).

Fig. 6: Distribution of Tunisian-citizen residents by region, 2023



FLM elaboration on ISTAT data

1.2 Contribution to society and local economy

MOROCCO

The employment rate is the first key indicator to observe when analyzing the characteristics of the Moroccan population in terms of employment and its impact on the Italian labour market. This rate is significantly lower than the average for foreign citizens, both from EU and non-EU countries (table 3). The primary reason is the high level of female inactivity: only 2 out of 10 Moroccan women are employed, while nearly 7 out of 10 are inactive (table 4).

Tab. 3: Employment rate of Moroccan citizens in Italy vs employment rate of other EU and non-EU citizens in Italy (over 15 y/o), 2022

Moroccan citizens employed in Italy	158,019
Employment rate of Moroccans	47.9%
Employment rate of non-EU foreigners	59.2%
Employment rate of EU foreigners	64.0%
Average employment rate of foreigners	60.6%

FLM elaboration on ISTAT data

Tab. 4: Employment indicators of Moroccan citizens by gender, 2022

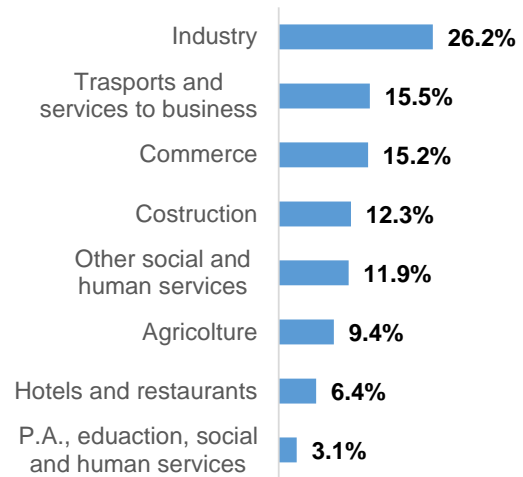
Gender	Employment rate (15-64 y/o)	Unempl. rate (over 15 y/o)	Inactivity rate (15-64 y/o)
Male	68.8%	10.6%	23.0%
Female	23.5%	24.8%	68.7%
Total	47.9%	14.3%	44.1%

FLM elaboration on ISTAT data

Moroccan workers in Italy are mainly employed in industry (26.2%), transport (15.5%), and commerce (15.2%). This is followed by construction (12.3%) and personal services (11.9%), (figure7).

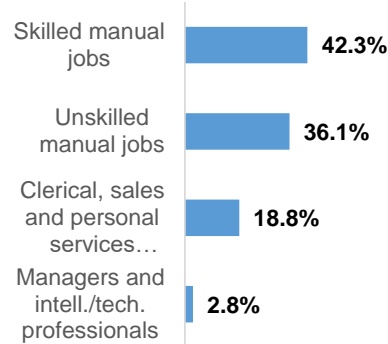
Over 78 per cent of those employed work in manual jobs (42% in skilled manual labour and 36% in unskilled manual labour). Only 2.8 per cent work in high-level occupations (figure 8).

Fig. 7: Moroccans workers by sector, 2022



FLM elaboration on ISTAT data

Fig. 8: Moroccan workers by type of occupation, 2022



FLM elaboration on ISTAT data

To summarise, Moroccan workers are predominantly male, employed in sectors such as industry and transport, and mainly engaged in manual labour roles.

TUNISIA

The working-age population also prevails among Tunisian citizens residing in Italy. However, only 50 per cent are employed, compared to 59 per cent of non-EU citizens and 64 per cent of EU citizens (table 5).

As for the case of Moroccan residents, the main reason for such situation is the inactivity of the female population: while 67.5 per cent of men are employed, the percentage drops to 19.9 per cent for women. It is clear that the labour market integration of the female population presents significant difficulties, as evidenced by the high rate of female unemployment (table 6).

Tab. 5: Employment rate of Tunisian citizens in Italy vs. Employment rate of EU and non-EU citizens in Italy (over 15 y/o), 2022

Tunisian citizens employed in Italy	35,656
Employment rate of Tunisians	50.3%
Employment rate of non-EU foreigners	59.2%
Employment rate of EU foreigners	64.0%
Average employment rate of foreigners	60.6%

FLM elaboration on ISTAT data

Tab. 6: Employment indicators of Tunisian citizens by gender, 2022

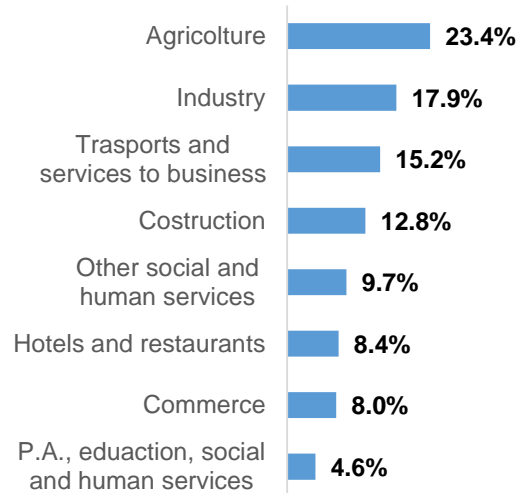
Gender	Employment rate (15-64 y/o)	Unempl. rate (over 15 y/o)	Inactivity rate (15-64 y/o)
Male	67.5%	14.8%	21.5%
Female	19.9%	35.0%	69.4%
Total	50.3%	18.4%	38.8%

FLM elaboration on ISTAT data

Tunisian workers are employed in agriculture in 23.4 per cent of cases, followed by industry (17.9%) and transport (15.2%). Lower figures are seen in construction (12.8%) and personal services (9.7%), (figure 9).

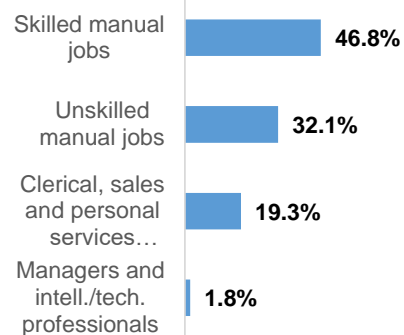
Nearly 80 per cent of workers are engaged in manual labour, mainly in skilled roles (46.8%). Only 1.8 per cent hold highly qualified positions (figure 10).

Fig. 9: Tunisian workers by sector, 2022



FLM elaboration on ISTAT data

Fig. 10: Tunisian workers by type of occupation, 2022



FLM elaboration on ISTAT data

In summary, the predominant profile of employed Tunisian citizens in Italy is that of male workers engaged in agriculture and industry. Among these, 46.8 per cent perform skilled manual labour, while 32.1 per cent are involved in unskilled manual work (figure 10).

2. PROFILE OF TUNISIAN AND MOROCCAN IMMIGRATION IN THE REGIONS OF VENETO, EMILIA-ROMAGNA, AND LOMBARDY

VENETO



In Veneto 10 per cent of the population is of foreign origin, and the Moroccan community is the second largest one, with 46,000 individuals. This community

has been steadily decreasing over the years (-18.8% from 2013 to 2023), probably also due to citizenship acquisitions, which have involved 34,000 Moroccans since 2013 (table 7).

Tunisians, on the other hand, number just over 5,000, and represent the twentieth largest foreign community in the region. The majority of Tunisians are male (approximately 60%), and their presence in the region has also been declining (-10.9%). These foreign citizens have a notable impact on the regional economy, given that most of them are employed (table 7).³

Tab. 7: Moroccan and Tunisian residents in Veneto, 2023

	Resident Pop. 2023	Variation 2013-23	Incidence on resident foreign pop.
Morocco	45,922 (46.6% F)	-18.8%	9.2%
Tunisia	5,101 (39.6% F)	-10.9%	1.0%
Foreigners	498,127 (51.4% F)	+0.4%	10.3%*

*Incidence on the total pop. of the region. FLM elaboration on ISTAT data

Tab. 8: Moroccan citizens by main employment status in Veneto, 2022

Main status	2022 data	Distr.%
Workers	34,812	87.3%
Self-employed	2,829	
Semi-subordinate	258	
Employee	31,725	
Retiree	3,017	7.6%
Unemployed	2,045	5.1%
Total	39,874	100.0%

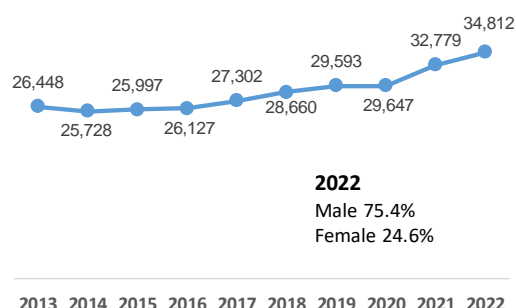
FLM elaboration on INPS data

Of the approximately 40,000 Moroccan citizens included in the “National Institute of Social Welfare (INPS records, 2,000 are unemployed and 3,000 are retirees. The majority are classified as “workers” (87.3%), with around 32,000 employed (table 8).

Over the past decade, the number of these workers has increased from 26,000 in 2013 to nearly 35,000 in 2022, a growth of 32 per cent. In 75 per cent of cases these workers are male, reflecting the significant level of female inactivity. Moroccan workers in Veneto are mainly employed as manual labourers (74.5%) or in agriculture. A low percentage is employed in domestic work (3.2% as housekeepers and 4.4% as caregivers), with a strong female presence (75%). Women also represent a growing share among office workers, comprising 66 per cent of this group (figure 11).

³ To identify foreign workers (Tunisian, Moroccan) in the region, data from the INPS administrative database is used, as detailed in the methodological note.

Fig. 11: Evolution over time of the presence of Moroccan workers in Veneto



2022

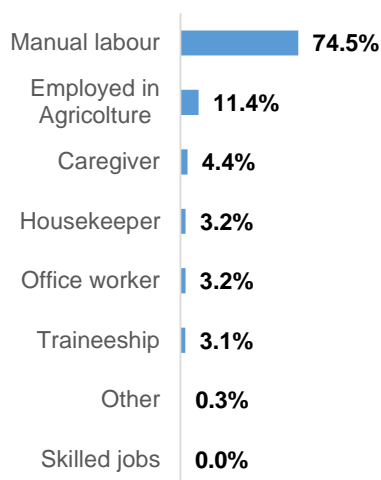
Male 75.4%

Female 24.6%

2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

FLM elaboration on INPS data

Fig. 12: Moroccan workers by type of occupation in Veneto, 2022



FLM elaboration on INPS data

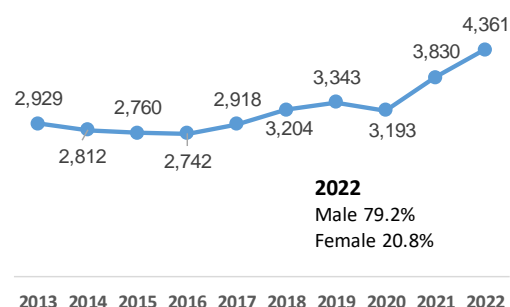
Ninety per cent of Tunisian citizens in the INPS records are classified as workers. There are only 197 unemployment benefit recipients and 263 retirees. Among the workers, the majority are employees (3,903), (table 9).

Tab. 9: Tunisian citizens by employment status in Veneto, 2022

Main status	2022 data	Distr. %
Workers	4,361	90.5%
Self-employed	419	
Semi-subordinate	39	
Employee	3,903	
Retiree	263	5.5%
Unemployed	197	4.1%
Total	4,821	100.0%

FLM elaboration on INPS data

Fig. 13: Evolution over time of the presence of Tunisian workers in Veneto



2022

Male 79.2%

Female 20.8%

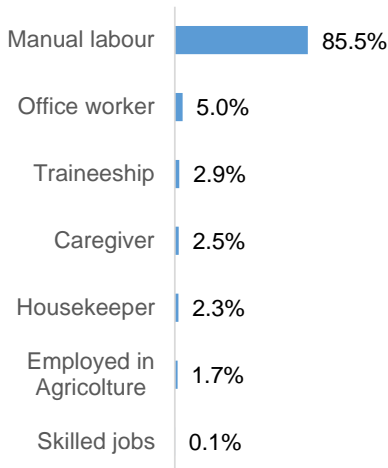
2013 2014 2015 2016 2017 2018 2019 2020 2021 2022

FLM elaboration on INPS data

Over the past decade the number of Tunisian workers in Veneto has increased, rising from 2,929 in 2013 to over 4,000 in 2022 (+49%). The female presence remains a minority, accounting for 20.8 per cent of workers.

While at national level many Tunisian workers are employed in agriculture, this is not the case in Veneto. Instead, 85.5 per cent work as manual labourers, with only 1.7 per cent employed in agriculture. The female representation increases significantly among caregivers (91%) and office workers (54%), (figure 14).

Fig. 14: Tunisian workers by type of occupation in Veneto, 2022



FLM elaboration on INPS data

To complete the regional analysis, it is valuable to examine the specifics of the mechatronics and construction sectors, which are prioritised within THAMM Plus. To this end Local Enterprise Units are considered, which refer to the number of operational, administrative and management facilities present in the territory.

In Veneto mechatronics involves nearly 13,000 local units, while construction involves over 51,000. Compared to the overall regional local units mechatronics accounts for 3 per cent, whereas construction for 12 per cent.

The impact of these sectors is also evident through other indicators, which show that mechatronics has a high productivity level. Specifically, mechatronics employs 9.1 per cent of the active workforce of Veneto and contributes 12.8 per cent to the regional Gross Value Added (GVA). In contrast, construction is characterised by a network of small businesses with a lower economic impact, contributing 7.3 per cent to the GVA and 7.9 per cent of total employment.

The disparity between the two sectors is evident in terms of employee hiring: the mechatronics sector employs 11.2 per cent of the total workforce in enterprises, while construction employs only 6.4 per cent.

Tab. 10: Analysis of the Impact of the Mechatronics and Construction Sectors in Veneto, 2021

	Local business units	Gross Value Added (mln euros)	Employed	Self-employed
Mechatronics	12,936	12,003	156,721	143,516
Construction	51,209	6,856	136,085	81,976
<i>Incidence % on the total</i>				
Mechatronics	3.1%	12.8%	9.1%	11.2%
Construction	11.1%	7.3%	7.9%	6.4%

FLM elaboration on ISTAT data

EMILIA-ROMAGNA



As of 2023 there were over 500,000 foreign residents in Emilia-Romagna, a decrease of 8.8 per cent compared to 2013. Among them, 53 per cent are women (table 11).

In Emilia-Romagna the Moroccan nationality is the second most represented, following Romania, while Tunisia ranks eighth, showing significantly higher numbers compared to Veneto. Overall, there has been a decline in the presence of Moroccan citizens in recent years, while the presence of Tunisian citizens has remained relatively stable.

In 2022 there were 43,000 Moroccan workers in Emilia-Romagna, with the majority being employees (38,296). Approximately 4,000 were retirees, and 2,632 received unemployment benefits (table 12).

The employment presence of Moroccan workers has grown over time in Emilia-Romagna, with a predominance of male workers (71.7%), (figure 15).

Tab. 11: Moroccan and Tunisian residents in Emilia-Romagna, 2023

	Resident Pop. 2023	Variation 2013-23	Incidence on resident foreign pop.
Morocco	59,130 (47.9% F)	-16.0%	11.7%
Tunisia	20,182 (39.1% F)	+0.1%	4.0%
Foreigners	505,377 (53.1% F)	-8.8%	11.4%

*Incidence on the total pop. of the region.

FLM elaboration on ISTAT data

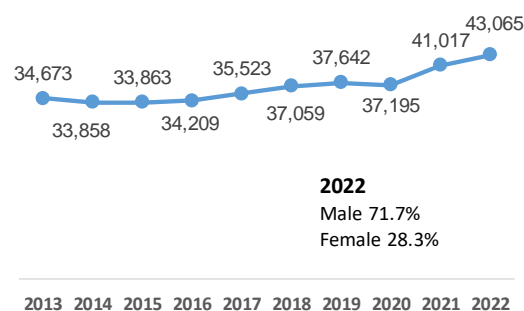
Tab. 12: Moroccan citizens by main employment status in Emilia-Romagna, 2022

Main status	2022 data	Distr. %
Workers	43,065	85.8%
Self-employed	4,453	
Semi-subordinate	316	
Employee	38,296	
Retiree	4,474	8.9%
Unemployed	2,632	5.2%
Total	50,171	100.0%

FLM elaboration on INPS data

Seventy-five per cent of Moroccan workers are employed as manual labourers, while 10 per cent work in agriculture. Notably, nearly five per cent manage to find employment as clerical staff. The female presence has significantly increased in specific occupations, such as caregivers (94%), clerical workers (66%), and domestic workers (60%). (figure 16).

Fig. 15: Evolution over time of the presence of Moroccan workers in Emilia-Romagna

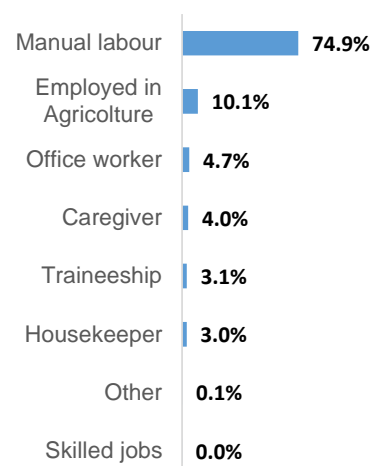


FLM elaboration on INPS data

Similarly, among Tunisian citizens the workforce is notably significant. In 2022 nearly 15,000 workers were registered by INPS, the majority of whom were employees.

The number of workers has steadily increased over time, rising from 10,700 in 2013 to over 15,000 in 2022. However, the female presence remains low at 20.9 per cent, reflecting the broader trend of women's inactivity within the examined communities (figure 17).

Fig. 16: Moroccan workers by type of occupation in Emilia-Romagna, 2022



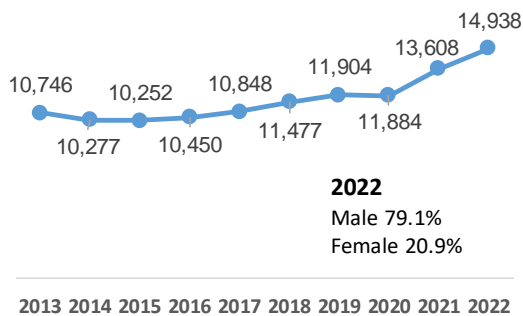
FLM elaboration on INPS data

Tab. 13: Tunisian citizens by main employment status in Emilia-Romagna, 2022

Main status	2022 data	Distr.%
Workers	14,938	89.1%
<i>Self-employed</i>	3,037	
<i>Semi-subordinate</i>	122	
<i>Employee</i>	11,779	
Retiree	1,109	6.6%
Unemployed	716	4.3%
Total	16,763	100.0%

FLM elaboration on ISTAT data

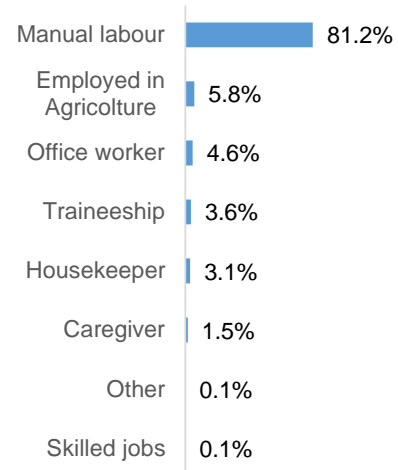
Fig. 17: Evolution over time of the presence of Tunisian workers in Emilia-Romagna



FLM elaboration on INPS data

The majority of Tunisian workers are employed as manual labourers (81.2%), followed by those in agriculture at 5.8 per cent and clerical positions at 4.6 per cent (figure 18).

Fig. 18: Tunisian workers by type of occupation in Emilia-Romagna, 2022



FLM elaboration on INPS data

There is an increase in female participation in the labour market for professions such as caregivers (90%) and clerical roles (60%).

To assess the relevance of the mechatronics and construction sector in the region, data regarding the economic performance of businesses were analysed, with reference to Local Enterprise Units.

In Emilia-Romagna there are over 12,000 Local Enterprise Units classified as being part of the mechatronics sector (3.1% of the total), along with 48,000 firms associated with construction (12.3%), (table 14).

However, data on value added (V.A.) and employment highlights the greater significance of the mechatronics sector. This sector generates 17.9 per cent of the V.A. produced by businesses, and accounts for 11.5 per cent of the total personnel employed within firms. These figures indicate the importance of this sector for Emilia-Romagna. Conversely, the construction sector, while involving a large number of companies, only generates 6.4 per

cent of total V.A. and employs 7.3 per cent of the overall workforce (table 14).

Tab. 14: Analysis of the Impact of the Mechatronics and Construction Sectors in Emilia-Romagna, 2021

	Local business units	Gross Value Added (mln euros)	Employed	Self-employed
Mechatronics	12,202	16,531	181,665	169,545
Construction	48,483	5,929	115,717	66,578
<i>Incidence % on the total</i>				
Mechatronics	3.1%	17.9%	11.5%	14.5%
Construction	12.3%	6.4%	7.3%	5.7%

FLM elaboration on ISTAT data

LOMBARDY



Lombardy is the Italian region with the highest presence of immigrants, comprising almost 12 per cent of the local population (table 15).

Morocco ranks as the third largest foreign community (7.6%), following Romania (14.6%) and Egypt (8.4%). There has also been a significant decrease since 2013 (-18.1%), a trend influenced by a reduction in arrivals and an increase in citizenship acquisitions. Tunisia ranks sixteenth with 17,500 residents, 40 per cent of which are female. Compared to 2013, this figure has seen an increase of 12 per cent.

Approximately 63,000 Moroccan workers are recorded in the INPS archives, comprising 7,000 self-employed individuals and 55,000 employees. Of these, 3,600 receive unemployment benefits, and nearly 6,000 are classified as “retirees” (table 16).

Tab 15: Moroccan and Tunisian citizens residing in Lombardy, 2023

	Resident Pop. 2023	Variation 2013-23	Incidence on resident foreign pop.
Morocco	89,603 (48.1% F)	-18.1%	7.6%
Tunisia	17,560 (40.5% F)	+12.1%	1.5%
Foreigners	1,176,169 (50.8% F)	+9.7%	11.8%*

*Incidence on the total population of the region.

FLM elaboration on ISTAT data

Tab. 16: Moroccan citizens by main employment status in Lombardy, 2022

Main status	2022 data	Distr.%
Workers	62,969	87.0%
Self-employed	6,964	
Semi-subordinate	659	
Employee	55,346	
Retiree	5,810	8.0%
Unemployed	3,598	5.0%
Total	72,377	100.0%

FLM elaboration on INPS data

The number of workers has seen significant growth over time, from 49,000 in 2013 to 63,000 in 2022. Of these workers, 27.5 per cent are female (figure 19).

The majority of workers are manual labourers, comprising 80.6 per cent of the workforce, while clerical staff represent the second most common occupation (6.1%). The presence of workers in the agricultural sector is minimal. Women are increasingly represented in occupations such as caregivers (93%) and clerical roles (61%), (figure 20).

Fig. 19: Evolution over time of the presence of Moroccan workers in Lombardy

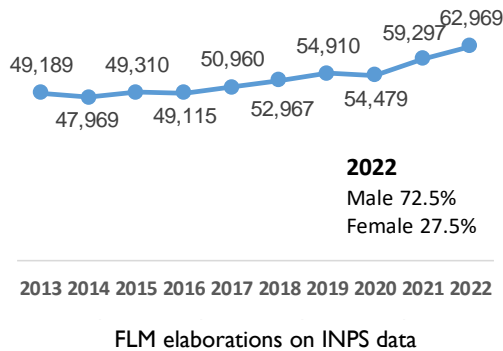
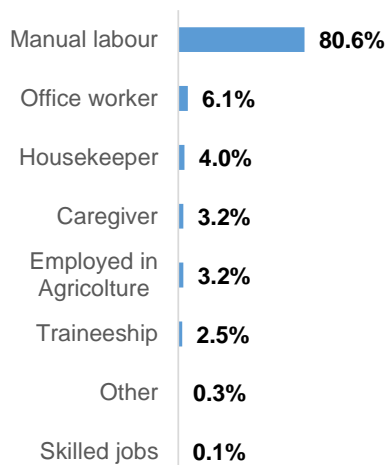


Fig. 20: Moroccan workers by type of occupation in Lombardy, 2022



FLM elaboration on INPS data

Tab. 17: Tunisian citizens by main employment status in Lombardy, 2022

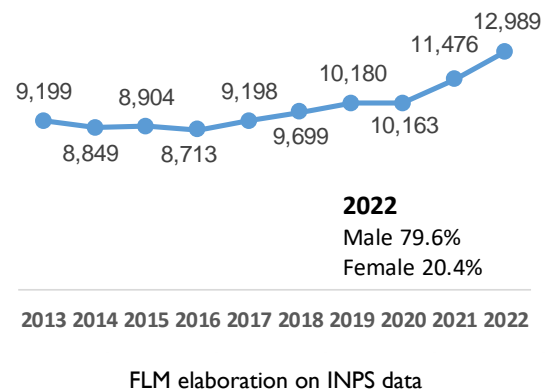
Main status	Dati 2022	Distr. %
Workers	12.989	89,7%
Self-employed	1.420	
Semi-subordinate	167	
Employee	11.402	
Retiree	876	6,1%
Unemployed	614	4,2%
Total	14.479	100,0%

FLM elaboration on INPS data

There are 13,000 Tunisian workers registered with the INPS, 11,000 of which are employees and 1,420 self-employed. A total of 614 Tunisians receive unemployment benefits, and 876 are pensioners. The number of Tunisian workers has increased by 41 per cent since 2013. In 2022, almost 13,000 workers were recorded, 20 per cent of whom were female. As with other groups, the majority were manual workers (83%) followed by clerical workers (7.9%); other professions accounted for very small percentages (table 17).

The presence of women increases in the caregiving (86%), and among clerical workers (53%).

Fig. 21: Evolution over time of the presence of Tunisian workers in Lombardy



When analysing the impact of the mechatronics and construction sectors in Lombardy, it is evident that the number of Local Enterprise Units is significant, although the incidence is similar to that found in other regions. However, the contribution to V.A. is lower, as several high-V.A. sectors in Lombardy reduce the relative importance of mechatronics in the region's overall economic output.

Fig. 22: Tunisian workers by type of occupation in Lombardy, 2022



FLM elaboration on INPS data

In any case, mechatronics companies generate 9.3 per cent of the V.A. and account for 7.8 per cent of the jobs created by businesses. The construction sector, on the other hand, generates 4 per cent of the V.A. and represents 5.5 per cent of employment (table 18).

Tab. 18: Analysis of the Impact of the Mechatronics and Construction Sectors in Lombardy, 2021

	Local business units	Gross Value Added (mln euros)	Employed	Self-employed
Mechatronics	25,159	22,940	285,154	261,094
Construction	104,311	9,807	202,045	116,155
<i>Incidence % on the total</i>				
Mechatronics	2.8%	9.3%	7.8%	9.4%
Construction	11.6%	4.0%	5.5%	4.2%

FLM elaboration on ISTAT data

3. THE CONSTRUCTION AND MECHATRONICS SECTORS AS KEY ATTRACTORS FOR WORKERS FROM THIRD COUNTRIES

For several years, foreign workers have played a significant role in the Italian economy, accounting for around one-tenth of total employment and contributing 9 per cent to the country's GDP.⁴ In 2022 immigrants accounted for 19 per cent of all new hires, with a total of 2.4 million new employment contracts.⁵

Given that 25 per cent of the Italian workforce is aged 55 or over, the demand for labour force is likely to increase in the coming years. This, in turn, will drive up the demand for the foreign one.

Data from the Excelsior-Unioncamere information system can be used to quantify labour needs in sectors such as construction and mechatronics. Despite the current geopolitical and macroeconomic uncertainty, the survey, distributed among Italian companies, provides insights into employment needs over the next five years.

According to the latest report "Medium-term Employment and Professional Demand Forecasts in Italy (2024-2028)",⁶ the estimated total labour demand in Italy between 2024 and 2028 ranges from 3.1 million to 3.6 million workers, depending on the considered scenario.

In particular, this demand is driven by two key factors: the **expansion demand**, which refers to the projected change in total employment in different sectors based on economic growth

estimates; and the **replacement demand**, which refers to the need to replace workers leaving the labour market due to retirement or other reasons.

According to the estimated projections, the "mechatronics and robotics" sector will require between 98,000 and 129,000 workers over the next five years (table 19). The sector currently employs over one million people, with 6.7 per cent of the workforce aged 59 or over. It also has a high turnover rate (22.2%), which is above the national average and higher than in other occupations (table 20). For example, managers tend to have a 15 per cent exit rate after the age of 59.

Tab. 19: Total employment demand estimated for the 2024-2028 period⁷

	Negative Scenario (C)	Positive Scenario (A)
Mechatronics and robotics	97,700	129,100
Construction and infrastructures	263,000	289,700

FLM elaboration on Excelsior-Unioncamere data

The Excelsior report provides further insights into the types of jobs needed in the mechatronics and robotics sectors. It states: "The demand for 100,000–130,000 workers over the next five years will be spread across various roles, including mechanical, electrical, and electronic engineers, robotics specialists, skilled workers, and industrial machinery and vehicle mechanics.

In the context of the technological transition, skills related to robotics, automation, and process

⁴ Cfr. Annual Report on the Economy of Immigration, Leone Moressa Foundation.

⁵ Statistical Information System of Mandatory Communications (Sistema Informativo Statistico delle Comunicazioni Obbligatorie)

⁶ Medium-Term Employment and Professional Needs Forecasts in Italy (Previsioni dei fabbisogni occupazionali e professionali in Italia a medio termine) (2024-2028).

⁷ The Excelsior Report outlines three forecast scenarios: A) Positive; B) Intermediate; and C) Negative. This summary focuses only on the negative and positive extremes.

standardization are already critical, and the impact of artificial intelligence is expected to increase significantly in the coming years.

Regarding the environmental transition, essential skills will include expertise in systems that use alternative energy sources (such as electric, solar, wind, and biomass energy), electrification, energy conservation, as well as familiarity with the environmental protocols specific to the sector”.

Tab. 20: Employment prospects

	Private employee stock as of 31.12.20	Over 59 anni quota on stock (%)	Exit rate over 59
Mechatronics & robotics	1,031,700	6.7%	22.2%
Construction & infrastructure	1,044,400	9.1%	22.1%
Total	12,935,600	7.9%	21.2%

FLM elaboration on Excelsior-Unioncamere data

For the construction sector, workforce demand for the period 2024-2028 is projected to be between 263,000 and 290,000 workers, depending on the scenario.

With over a million employees at the end of 2020, the sector had 9.1 per cent of its workforce aged over 59 and a high turnover rate (22.1%), (table 20). The employment outlook for Tunisian and Moroccan workers is promising, with 12-13 per cent of these immigrants already employed in the sector. Additionally, the number of contracts activations in 2022 increased compared to 2021, with a 31 per cent for Moroccan workers and a 43 per cent increase for Tunisian workers, against an average growth of 27 per cent for contracts activated to foreign citizens.

Finally, the Excelsior report goes into detail on the types of workers needed in the construction sector: "Thanks to the investments from the PNRR,⁸ the construction industry and related sectors will have a significant demand for workers (between 260,000 and 290,000 in the five-year period), mainly focused on specialized construction workers, structural maintenance staff, and finishing experts. There will also be a need for civil engineers, architects, urban planners, landscape architects, and specialists in territorial restoration and conservation, as well as site management technicians".

4. CHALLENGES AND OPPORTUNITIES

4.1. Barriers to labour mobility and labour market inclusion

In recent years Italy's migration landscape has seen a marked decline in entries for employment purposes, which now represent an almost negligible percentage. Conversely, there has been an increase in the number of entries for family reunification, to be linked to the growing stability of those migrants who arrived in Italy in the 1990s and 2000s. Thus, such family-related arrivals are not directly connected to the specific demands of the Italian labour market.

Moreover, certain characteristics of migrants from third countries, such as limited language skills, low levels of education, and often minimal work experience, have further exacerbated existing trends regarding the employability of the foreign labour force present in Italy. This has led to a greater concentration of migrants in low-skilled and manual jobs, making them more vulnerable to socio-economic crises.

A contributing factor in the current situation is the rise in individuals seeking international

⁸ National Recovery and Resilience Plan

protection, likely due to insufficient regular migration options for work. This has led to the misuse of the asylum process; for many migrants, seeking asylum has become the only legal way to remain in Europe. Therefore, reestablishing regular entry channels, beyond just family reunification, has become essential to address various issues.

- To address the real demands of the labour market, by thoroughly reviewing both national and local requirements, while simultaneously creating preferential pathways for skilled workers;
- To ease the flows of entry for protection reasons so as to achieve humanitarian and economic benefits. Furthermore, it allows to offer opportunities for ‘safe, regular and orderly’ migratory flows, as one of the priorities set by the 2030 Agenda (signed by the governments of the 193 UN member countries) and Sustainable Development Goal 17; both frameworks aim to involve all countries and the different components of society, from private companies to the public sector, from civil society to information and culture service officers, through a whole of-society approach.

4.2. Role of entry policies (Article 23) and integration in overcoming challenges

The Italian Government has taken a new path to promote regular migration and labour mobility, while also addressing irregular migration and human trafficking. This strategy involves fostering dialogue and cooperation at both bilateral and multilateral levels, including sustainable development aspects with third countries. Additionally, legislative measures have been introduced to broaden the channels for regular entry.

The so-called "Cutro Decree" (Decree Law 20/2023, converted into Law 50/2023) established a new set of regulations, introducing amendments to the Consolidated Immigration Act (TUI - Legislative Decree no. 286/1998) regarding the management of migration flows and the procedures for issuing the 'nulla osta' for work (work clearance) for foreign workers. These changes are intended to expedite the integration and employment of individuals entering Italy for job opportunities.

Specifically, **Article 1** of Cutro Decree has revised the planning of the Migration Flows Decree, allowing for the introduction of a three-year decree (2023-2025), in derogation of the provisions of Article 3 of the TUI that foresaw a yearly planning. The Migration Flows Decree sets out the criteria for determining the migration flows and quotas for work purposes for each of the three years in question. For the period 2023-2025, the Migration Flows Decree establishing the programme for the legal entry of foreign workers into Italy was adopted on 27 September 2023 and published in the Official Gazette on 3 October 2023, no. 231. It regulates the general criteria for defining migration flows as follows:

- a) the assignment of preferential quotas for workers from nations that, under agreements with Italy, conduct media campaigns highlighting the dangers of irregular migration and human trafficking;
- b) the allocation of specific quotas for the entry of stateless persons and refugees as recognized by the United Nations High Commissioner for Refugees or by the competent authorities in the countries of first asylum or transit;
- c) a measure allowing the entry of citizens from countries with which Italy has established readmission agreement,

exempting them from quota restrictions (the Cutro Decree modified Article 21 of the Consolidated Immigration Act by adding a new paragraph 1-bis).

Article 2 introduces a simplification in the entry procedure under the Consolidated Immigration Act, according to which a foreign worker who has entered Italy following the issuing of the work clearance (*'nulla osta'*) can start working even before signing the residence permit for employment. This simplification applies to all types of entry for subordinate employment, including seasonal work, and extends to entries made outside of the quota system (such as entries for Blue Card holders under Article 27-quater of the TUI, intra-company transfers under Article 27-quinquies, entries for those trained abroad, and entries for special cases under Article 27 of the TUI).

Article 3 has strengthened vocational and civic-linguistic training activities organised in countries of origin, allowing the entry of trained workers *outside* of the quotas set by the Flow Decree, in accordance with the procedures set out in Article 22. As a result, Article 23 of the TUI has been amended and renamed “Vocational education and training courses in countries of origin.”

Vocational training in the country of origin is an undoubtedly effective means of enabling future migrant workers to acquire not only specific professional skills but also basic knowledge of the Italian language, and essential elements of civic education. Prior to the amendments, this form of entry was part of the Flows Decree, which discouraged investing in training in countries of origin, even though businesses and employers' organizations were keen on such investments. In fact, under the previous system, training

courses could be completed during times when no quotas were available, preventing employers from applying for work clearance. The amendment introduced by the Cutro Decree is therefore driven by the need to meet the demands of the companies and to address the current shortages of qualified and specialized labour in many productive sectors in Italy. This is done by introducing a measure that simplifies the process for entry, outside of the specific quotas set by the Flows Decree, of migrant workers who have successfully completed vocational and civic-linguistic training programmes prior departure. As stated in the same article, the Ministry of Labour and Social Policies (*Ministero del Lavoro e delle Politiche Sociali*, MLPS), approved and adopted on 7 July 2023 guidelines setting out the methods for developing vocational and civic-linguistic training programmes, and the criteria for their evaluation. These guidelines define the range of entities eligible to promote training programmes and specify the essential content of the training. The programmes are then evaluated by a special Inter-ministerial Commission, established within the MLPS, with the participation of representatives from other relevant administrations.

4.3. National, regional and local initiatives for the labour inclusion in these sectors

Legislative measures to widen legal entry pathways into the country must be accompanied by strengthened integration efforts. Since 2024, the Directorate-General (DG) for Immigration and Integration Policies (now the Directorate-General for Migration Policies and the Social and Labour Integration of Migrants – hereby DG Immigration) of the MLPS has overseen integration policies. This was finalised following various ministerial reorganization decrees, and most recently with

the "Regulation for the reorganization of the Ministry of Labour and Social Policies and the Offices of Direct Collaboration" (DPCM 22 November 2023, n. 230, which tasks DG Immigration with coordinating social and labour integration of immigrants and initiatives to counter discrimination, xenophobia, and racism (Article 22). Based on these responsibilities, the DG Immigration is involved in numerous initiatives aimed at inclusion and integration:

- For the socio-economic inclusion of the most vulnerable migrants already present in Italy, such as asylum seekers and holders of international temporary protection (namely Ukrainian refugees), or special protection, measures have been put in place that facilitate the creation of networks of employment services, training institutions, and organizations involved in reception and integration activities. These measures also support the provision of specialized counselling services, job placement assistance, and internship opportunities. Between 2019 and 2023 the PUOI project, which was recognized as a good practice at the Global Refugee Forum, supported around 3,000 people towards independence. A new national programme, offering a broader and more structured range of services, is currently being finalized.
- A similar model has been used for the activities targeting Unaccompanied Migrant Children (UMC) the ongoing *Percorsi* project. Since 2016, it has provided integration opportunities through employment to around 3,000 young people, including UMC and former UMCs up to the age of 23.
- For vulnerable migrants in the reception system, a Protocol of Understanding (*Protocollo d'Intesa*) has been established

between the MLPS, the Ministry of the Interior, and Social Partners of the construction sector. This protocol implements training programmes in construction schools throughout Italy, as well as facilitates internships and job placements in construction companies. This approach, which balances a focus on the most disadvantaged individuals with the employment requirements of businesses, has garnered attention from other industries, including tourism and hospitality.

- The varying degrees of institutional competence in different aspects of integration, along with the goal of aligning these efforts more closely with local areas where integration occurs daily, prompted the MLPS to establish long-term collaborations with Regions, Autonomous Provinces, and Local Authorities, consistent with EU guidelines. These partnerships are embodied in the "Regional Action Plans for the Integration of Third-Country Nationals," which focus on initiatives across three key areas: enhancing multi-level governance for socio-labour integration; recognizing, developing, and enhancing skills; and fostering active participation in economic, social, and cultural activities. These broad categories give regions the flexibility to design interventions tailored to the unique needs of their communities.

Finally, since 2019, the MLPS has promoted a pilot project to foster inclusion in urban areas with high social vulnerability. The initiative involved 24 municipalities, including metropolitan cities, regional and provincial capitals with a high incidence of migrants. It enabled the development of projects aimed at socio-economic integration, particularly for migrant women; the participation of minors

and new generations; the tackling of housing challenges, and the strengthening of multi-level territorial governance. The range of interventions once more highlights the various

needs that local governments address daily within their communities.

CONCLUSIONS

Despite the employment growth in 2023, Italy's labour market still faces persistent challenges in sourcing workers for numerous sectors. This shortage hinders the potential economic contributions these industries might otherwise achieve. In the three regions studied in this brief, the construction and mechatronics sectors significantly impact the economy. Excelsior-Unioncamere forecasts predict this impact will grow over the next five years, contingent upon meeting labour demand in these sectors.

The immigrant workforce, which currently constitutes 10 percent of the national workforce, is an evident asset for Italy's economic development, particularly in the regions of Veneto, Lombardy, and Emilia-Romagna. While national trends confirm the steady presence of foreigners in the Italian economy, it is estimated that by 2026 Italy will have about 630,000 fewer people in its workforce. Meanwhile, many countries — including those with large immigrant communities in Italy — will see young populations reaching working age in the coming years, without enough job opportunities in their own countries.

The International Organization for Migration (IOM) works globally to create and enforce regular migration pathways that enhance economic and social development in host societies and migrants' countries of origin. Initiatives like THAMM Plus between Italy, Morocco, and Tunisia, and the "Pathways to Prosperity" project in Africa and Europe exemplify IOM's efforts. These programs aim to boost national economies through labor mobility, fill skills gaps with training in both origin and destination countries, increase tax revenues, and enrich societies through cultural exchanges and innovation.

In line with these principles, since 2018 IOM Italy has been implementing the "Y-med" project, which aims to offer students and recent graduates from Egypt, Libya, Morocco, and Tunisia the opportunity to undertake internships with companies in various Italian regions, while also supporting their job placement in their home countries. This gives young professionals the opportunity to enhance their skills and career prospects while promoting the economic and social development of both origin and destination countries. These initiatives offer concrete opportunities to facilitate the mobility of the labour force and skills to address the challenges faced by the participating countries, as well as create benefits for all stakeholders involved. It is on this basis that IOM's new Global Strategic Plan for 2024-2028 has identified as one of its three specific objectives the need to facilitate pathways for regular migration, prioritizing whole-of-government and whole-of-society approaches to safely connect people, goods, services, knowledge, and innovation.⁹

In conclusion, the scenario described for the sectors and the two communities examined confirms, on the one hand, the clear contribution that individuals with migrant backgrounds can make to societies. Evidence of this is offered by the occupational contribution of Moroccan and Tunisian citizens to the construction and mechatronics sectors, mainly concentrated in skilled labour positions. On the other hand, it highlights the need for destination countries, such as Italy, to develop policies that do not only attract workers but also retain them and maximize their potential. In this regard, for example, the analysis reveals that both communities also have a female component that is not fully valued in the workforce, with a national employment rate of about 20 per cent.

⁹ IOM Strategic Plan 2024 – 2028

It is crucial to find solutions that ensure a steady labour force in key sectors and promote inclusive participation of third-country nationals. This includes addressing gender equality, youth support, training, entrepreneurship, and socio-economic inclusion of vulnerable groups.

A primary objective should be the development and implementation of policies and actions that address the socio-economic inclusion of third-country nationals in Italy, thereby fostering strengthened social cohesion and enhanced economic development within local communities. This approach is a crucial component of a comprehensive strategy aimed at attracting, retaining, and valuing both existing and future talent.

METHODOLOGICAL NOTE

This briefing was made possible through the collaboration of the International Organization for Migration – Coordination Office for the Mediterranean, the Leone Moressa Foundation, and the Directorate General for Immigration and Integration Policies of the Ministry of Labor and Social Policies.

Mechatronics Sector: Mechatronics is a combination of techniques aimed at integrating electronics, mechanics, and computer science to optimize production system automation. Unlike construction, there is no specific sector for mechatronics, as its technologies can be applied across various industries. To quantify its impact, the ATECO¹⁰ sectors used by Excelsior in the report "Forecasts of Occupational and Professional Needs in Italy in the Medium Term (2024-2028)"¹¹ were considered as follows:

Mechatronics sectors by regional data	[26] Manufacture of computers, electronic and optical products, electromedical devices, measuring instruments, and clocks
	[27] Manufacture of electrical equipment and non-electric domestic appliances
	[28] Manufacture of machinery and equipment n.e.c. (not elsewhere classified)
	[29] Manufacture of motor vehicles, trailers, and semi-trailers
	[30] Manufacture of other transport equipment
	[33] Repair, maintenance, and installation of machinery and equipment
	[95] Repair of computers and personal and household goods

The Excelsior report did not consider the entire "26" division, but only the groups 26.1, 26.2, 26.3, and 26.4. Since ISTAT does not allow for this type of subdivision at the regional level, the entire 26 code was included.

Regional Foreign Workers: The data regarding Moroccan and Tunisian workers at the regional level was obtained from the INPS administrative database. This aims to provide a comprehensive picture of all foreign nationals known to INPS who, during the years of analysis, have worked or received unemployment benefits or pensions. The statistical unit of observation is a foreign citizen classified as either non-EU (if holding a valid residence permit) or EU (if born in an EU country). EU citizens were further divided into two categories: those born in one of the EU-15 countries and those from one of the remaining EU countries.

For each year, individuals are classified as workers, unemployed, or pensioners based on the status they held for the majority of the year. This method ensures that each individual is counted only once, so the sum of workers, pensioners, and unemployment beneficiaries does not involve any duplication. The countries of origin refer to the nationality for non-EU citizens.

¹⁰ ATECO is the classification of economic activities adopted by ISTAT for statistical purposes.

¹¹ Previsioni dei fabbisogni occupazionali e professionali in Italia a medio termine (2024-2028).

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