



# Workers at your service: Sources of data on posting of third-country nationals from Poland in road transport.

*PLEASE NOTE THAT THIS IS AN ABRIDGED  
VERSION OF THE PRESENTATION DELIVERED ON  
30 JUNE*

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# Postings of workers involving third-country nationals (TCNs)



- Based on the EU's principle of the free movement of services<sup>1</sup>
- When abroad, posted workers (including TCNs) remain participant in the labour market of the country from which they are posted.<sup>2</sup>
- TCNs are not required to obtain a work permit of the country to which they are posted.<sup>3</sup>
- Postings involving TCNs have been increasing in relative and absolute terms in the EU<sup>4</sup>
- Poland is no exception: An increasingly common business model for Polish companies<sup>5</sup>
- No evidence that TCNs are arriving to Poland to be posted abroad<sup>6</sup>

<sup>1</sup> Article 56 of the Treaty on the Functioning of the European Union (TFEU)

<sup>2,3</sup> JEU, Case C-113/89, *Rush Portuguesa Lda v Office national d'immigration*, 27 March 1990, §15

<sup>4</sup> *Mussche & Lens* 2019, *Kall et al.* 2020, OECD 2024

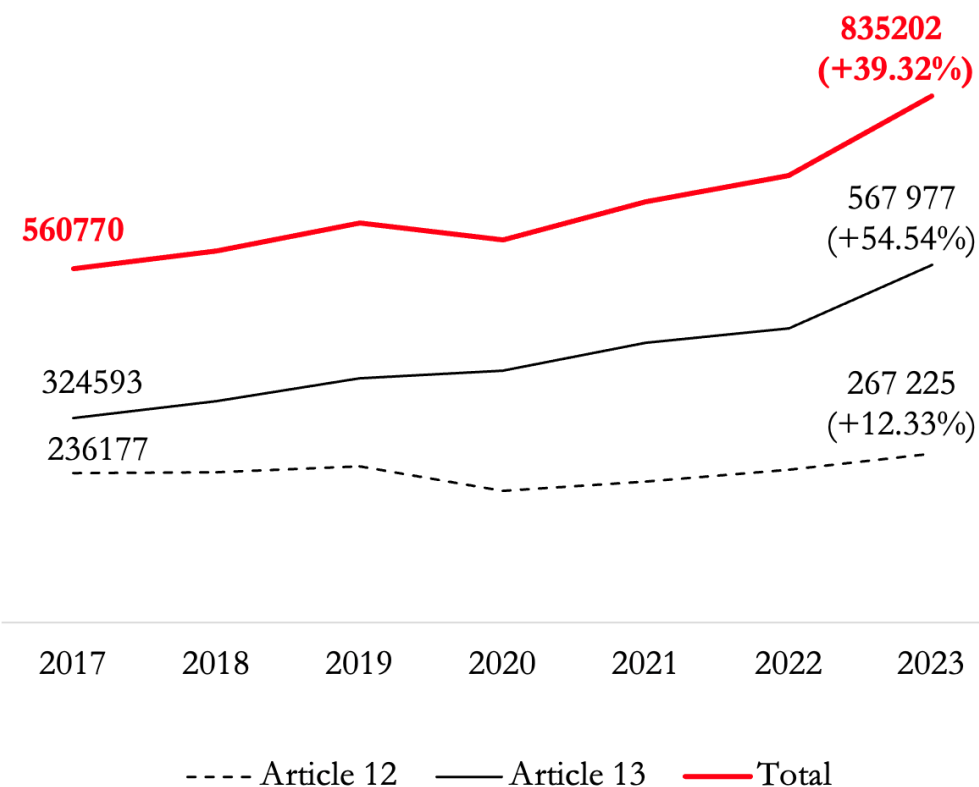
<sup>5</sup> *Cukut, Krilić et al.* 2020, *Danaj et al.* 2023

<sup>6</sup> ELA 2025

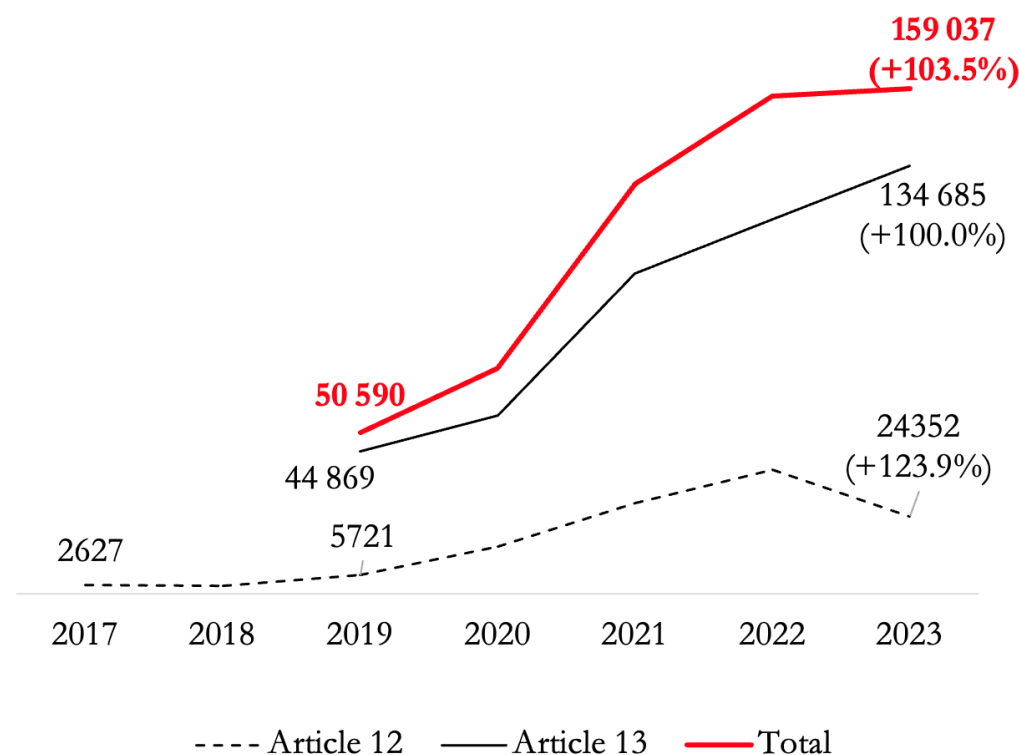


# Postings from Poland: Number of PD A1 issued by Poland by legal basis, 2017-2023 (all sectors of economic activity)

1. Postings from Poland – total



2. Postings from Poland – TCNs

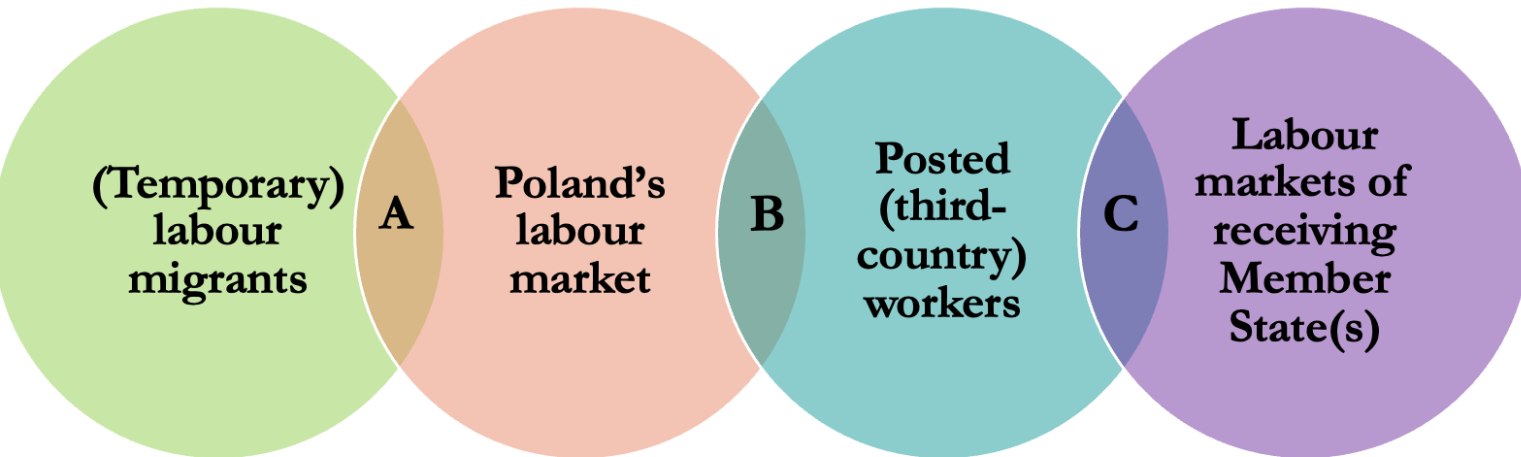


Source: Social Insurance Institution

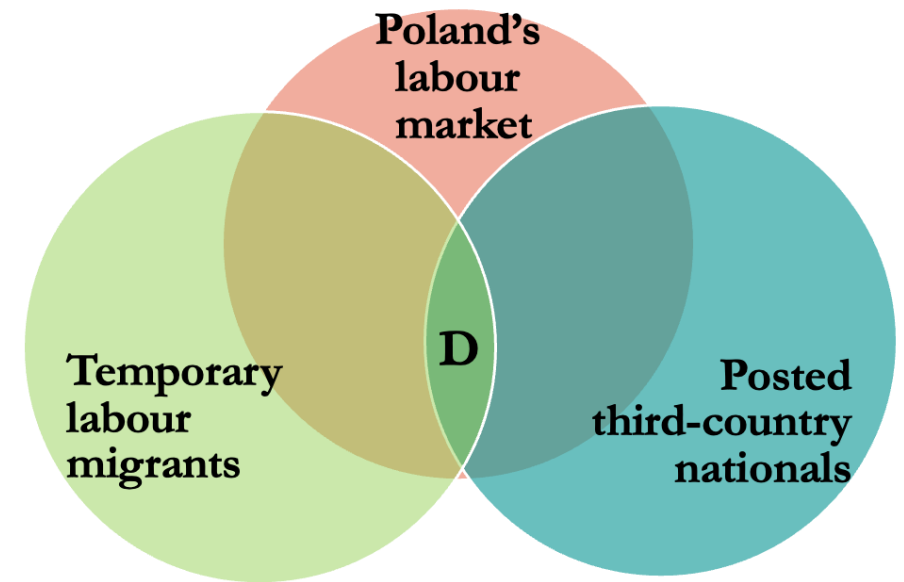
# Hypothesis: Temporary labour migrants form part of the labour market of the country of arrival

*Focus: TCNs posted from Poland in road transport*

**Figure 1.** Existing evidence base



**Figure 2.** This study's approach



**Hypothesis:** Temporary labour migrants form part of the labour market of the country of arrival (*cont'd*)

I verify this hypothesis in two steps:

i. Verify that TCNs posted from Poland play an important role in Poland's labour market

=> Labour market indicators: employment, supply & demand in road transport

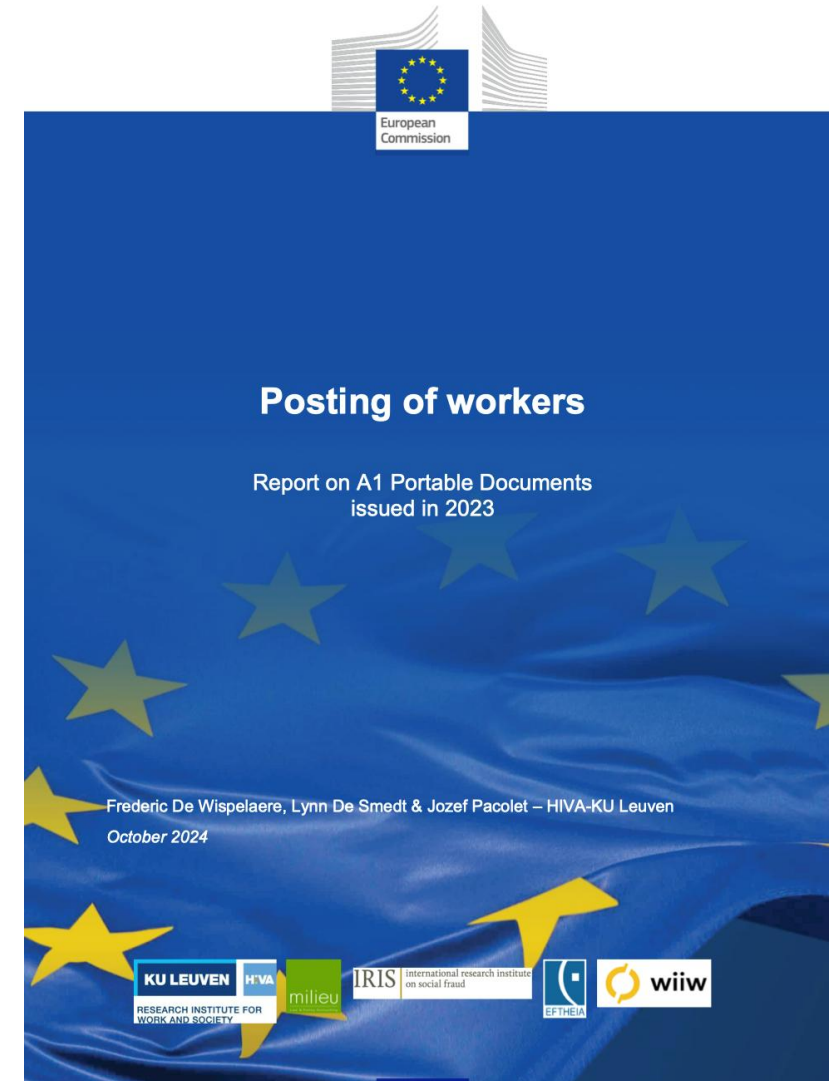
ii. Verify that labour shortages in road transport postings are being overcome by temporary labour migrants

=> *temporary* labour migration is becoming a *permanent* feature of the Polish labour market

# Data: Postings

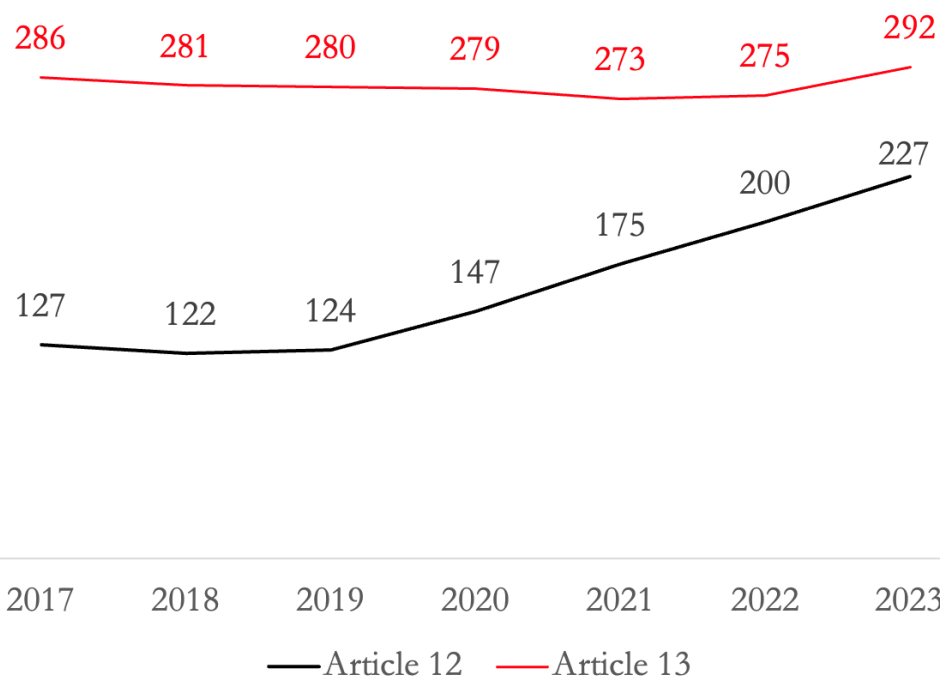
- **Portable Documents A1 (PD A1)** from Social Insurance Institution (*ZUS*) – also used in EC reports on the topic
- Used when a person (including a TCN) is sent to work temporarily in a Member State other than where they are insured
- Data available for 2017-2023 / 2019-2023 for TCNs covered by Article 13
- Disaggregated by:
  - Legal basis: **Article 12** of Regulation 883/2004<sup>1</sup> for ‘posted’ workers and self-employed persons and **Article 13** for those active in **two or more** Member States
  - NACE sectors (road transport as a standalone category)
  - Posted workers’ nationality
  - **Caveats:** posting duration (in days) & the no. of unique workers

<sup>1</sup> (EC) No 883/2004 of the European Parliament and of the Council of 29 April 2004 (Coordination of social security systems)



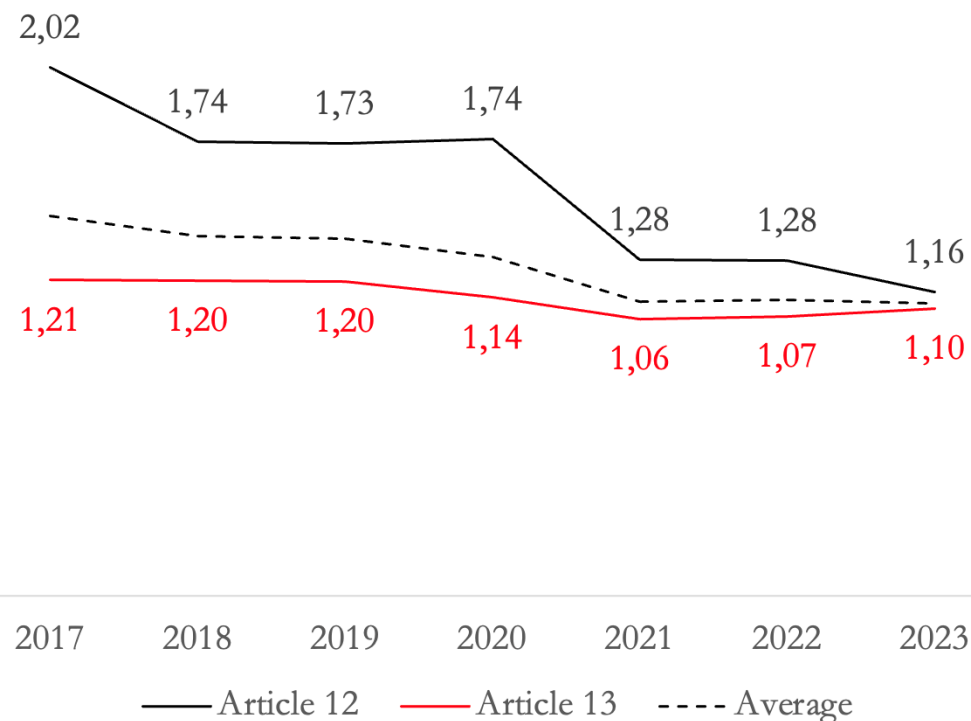
# Postings: Duration in days and ratio of PD A1 documents to unique persons

1. Average time of posting by legal basis (days)



Source: Social Security Institution

2. Ratio of PDs A1 to unique persons

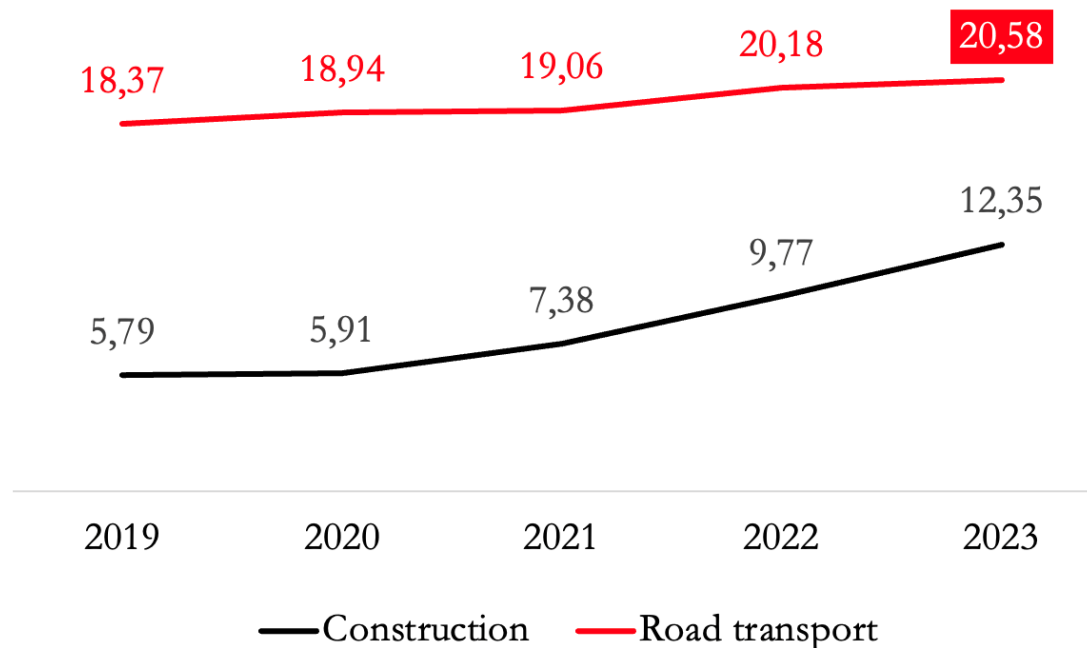


Source: Own calculations based on Social Security Institution data

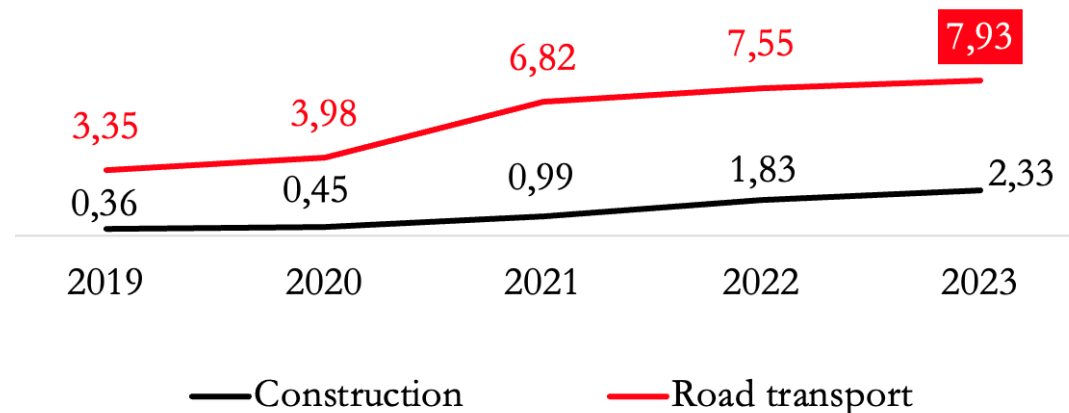
# Findings: Employment

*Postings in road transport (Article 13) account for an important share of employment in transportation & storage*

1. Postings (PD A1) covered by Article 13 as % of employment - selected sectors



2. TCN postings (PD A1) covered by Article 13 as % of employment - selected sectors



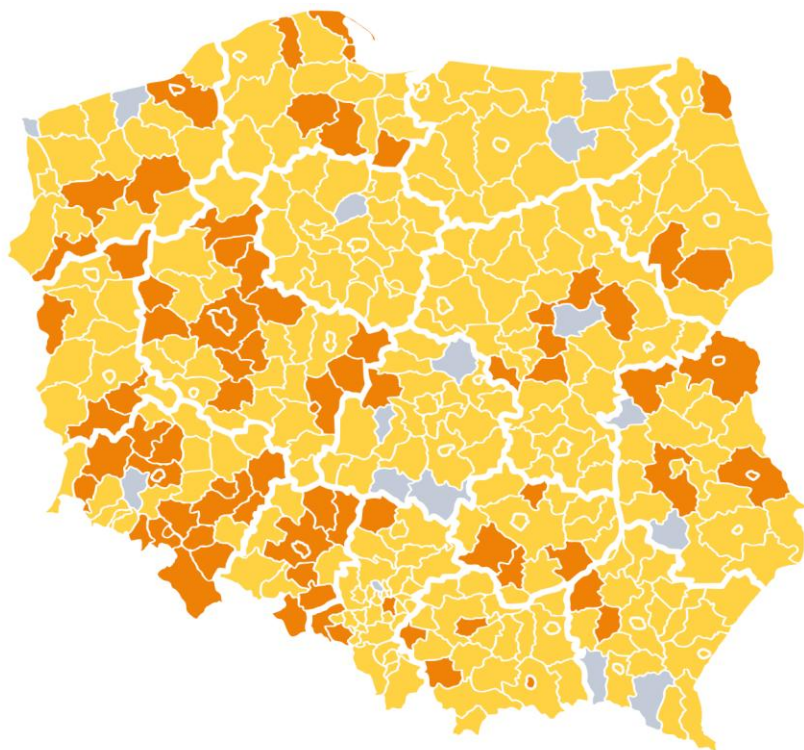
*Source: Own estimates based on SSI and Statistics Poland data*



# Findings: Postings vs labour demand (i)

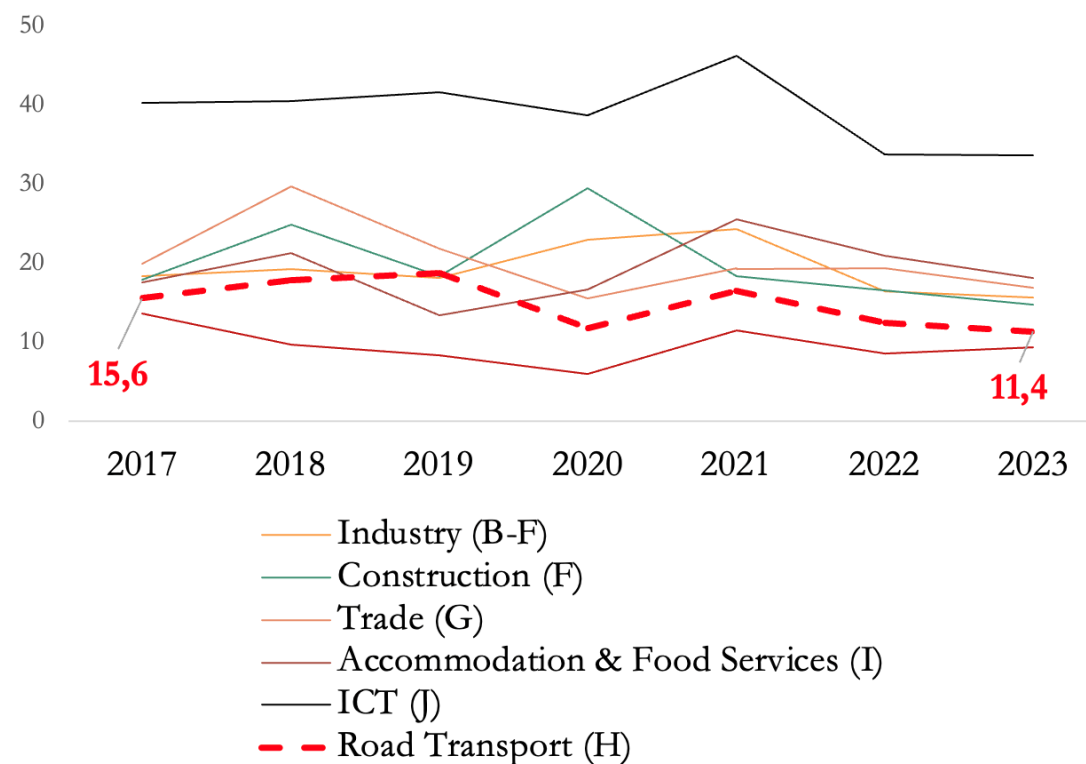
*Road transport is characterised by long-term labour shortages*

1. Relationship between available workers & employers' needs across districts (*powiaty*): **truck & tractor drivers**



Source: Occupational barometer 2023 ("Barometr zawodów")

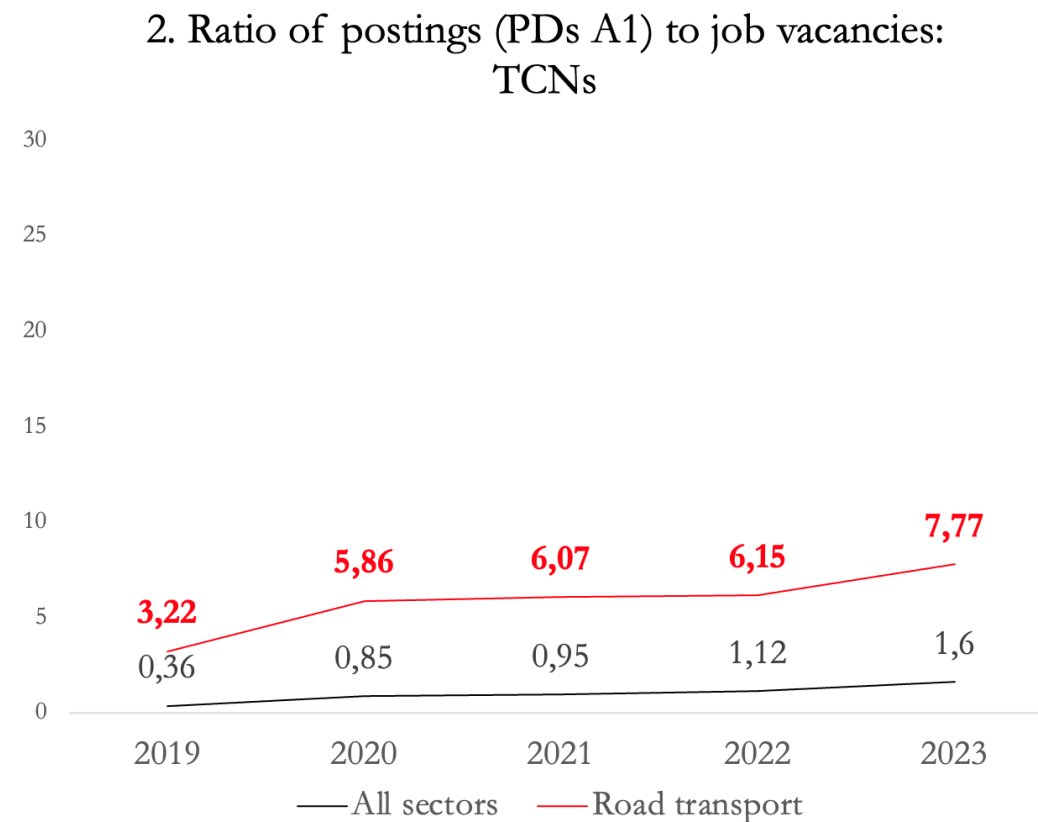
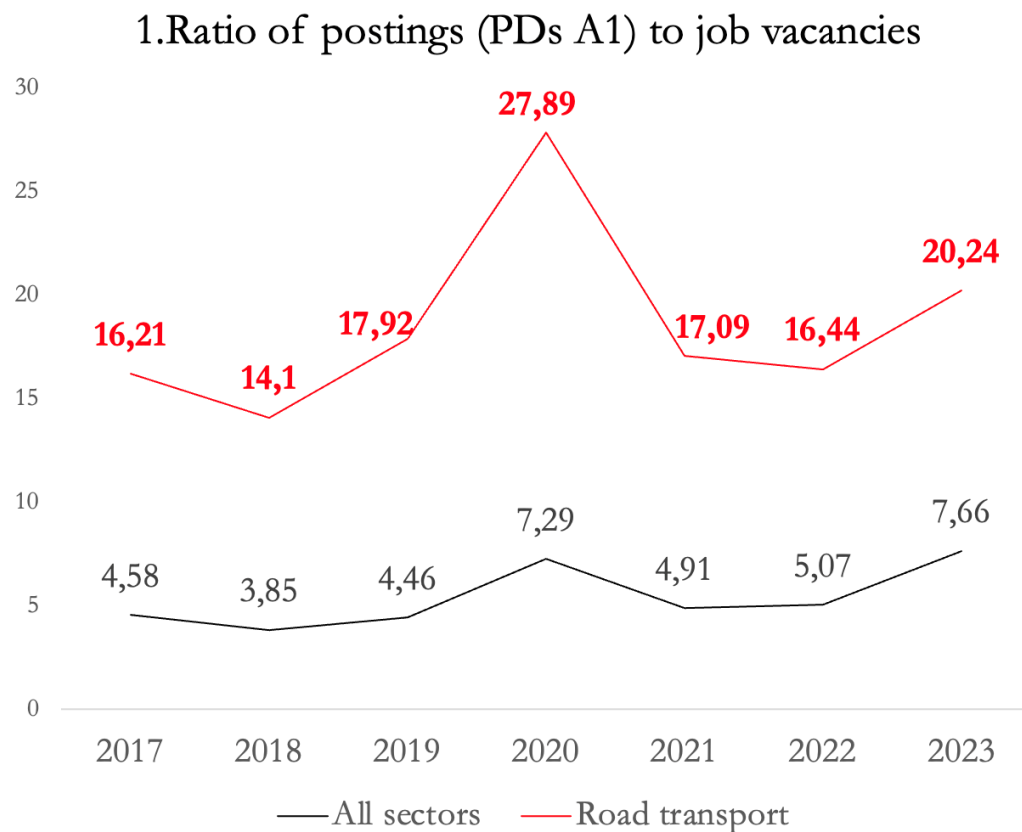
2. Newly created vacancies as a share of all job vacancies by sector (%)



Source: Statistics Poland

## Findings: Postings vs labour demand (ii)

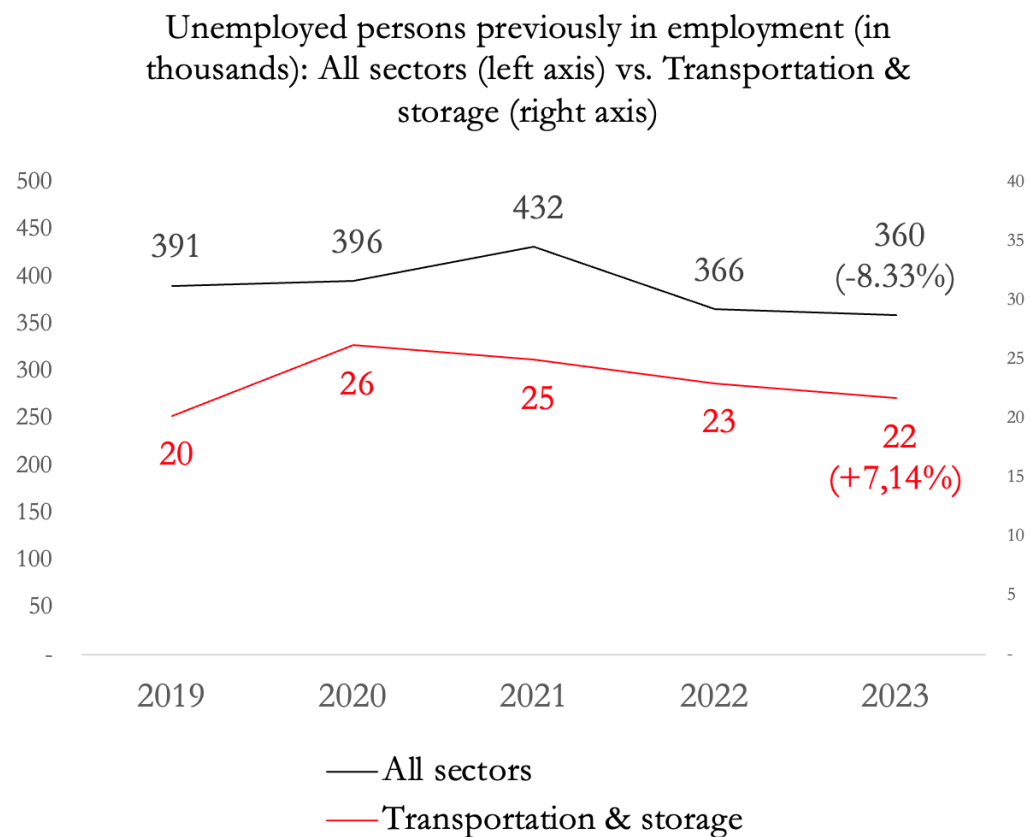
*Ratio of postings to job vacancies in road transport points to an increasingly steady reliance on TCNs*



*Source: Own estimates based on Social Security Institution and Statistics Poland data*

# Findings: Postings vs labour supply (i)

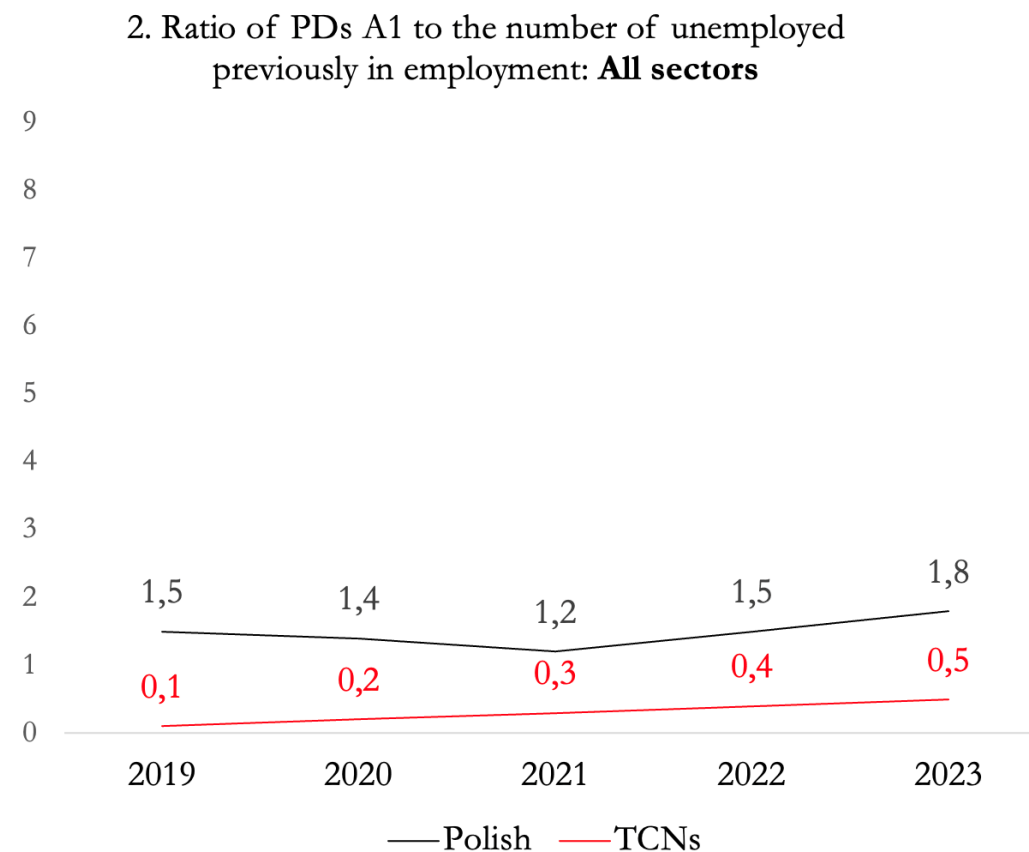
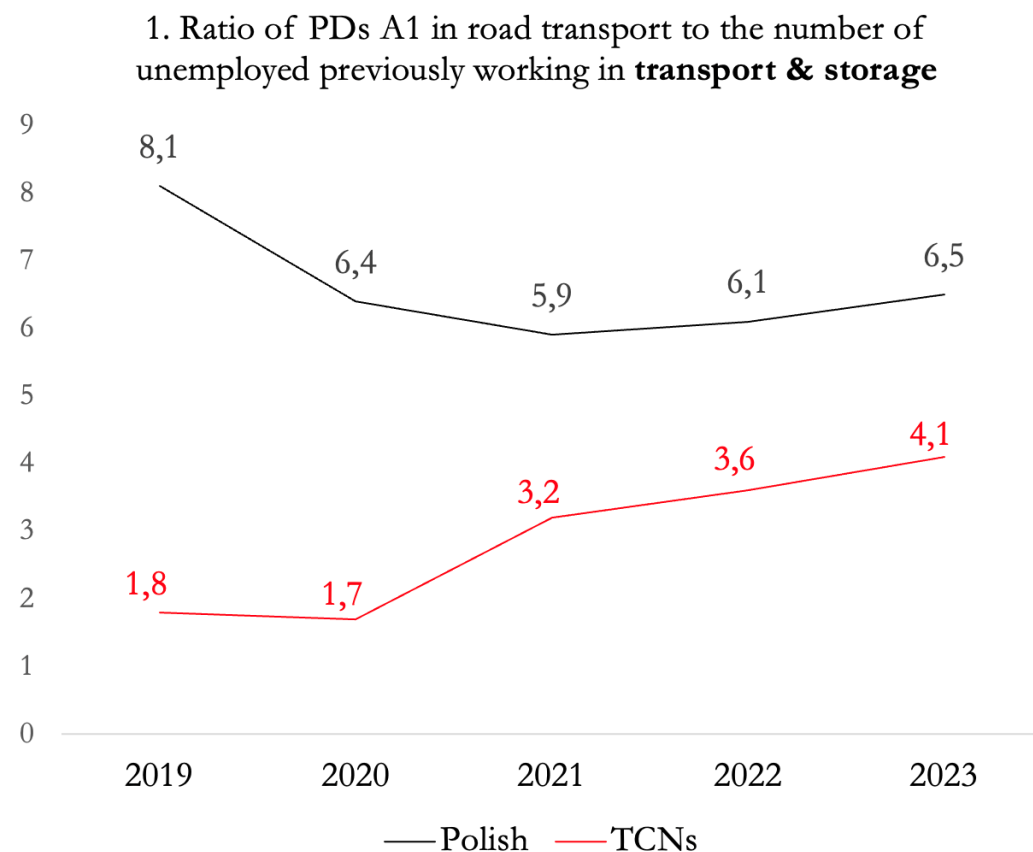
*Unemployed persons previously working in transport as a potential source of labour*



*Source: Statistics Poland*

# Findings: Postings vs labour supply (ii)

*Ratio of postings to the no. of unemployed persons previously working in transport*

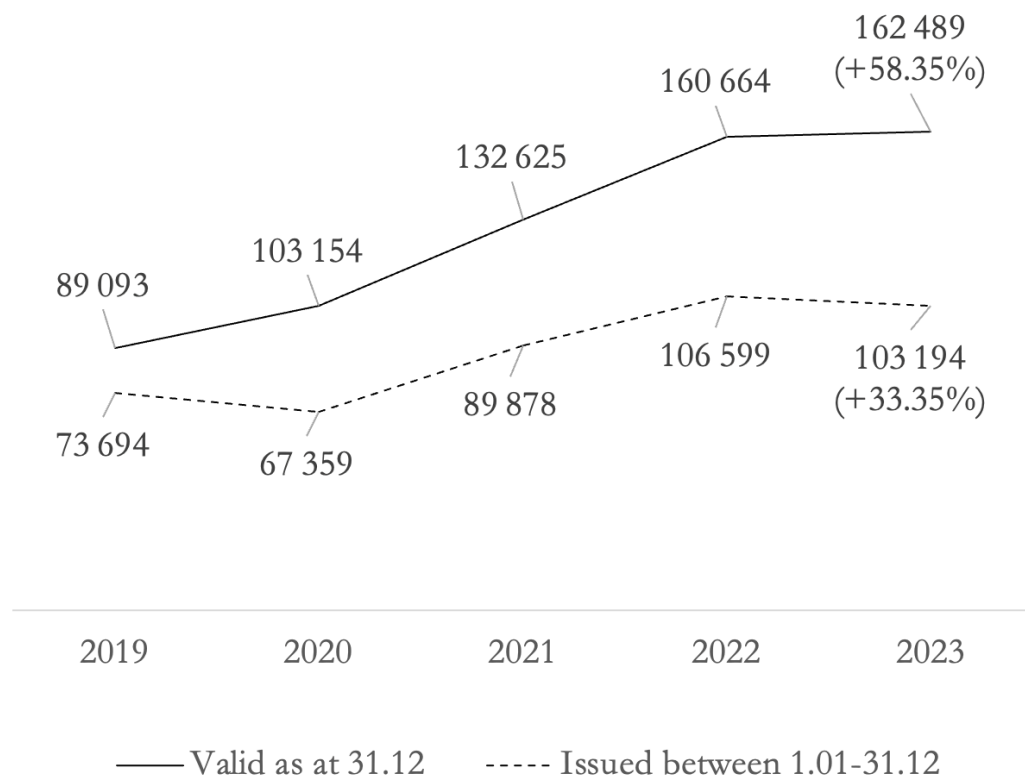


*Source: Own estimates based on Social Insurance Institution & Statistics Poland data*

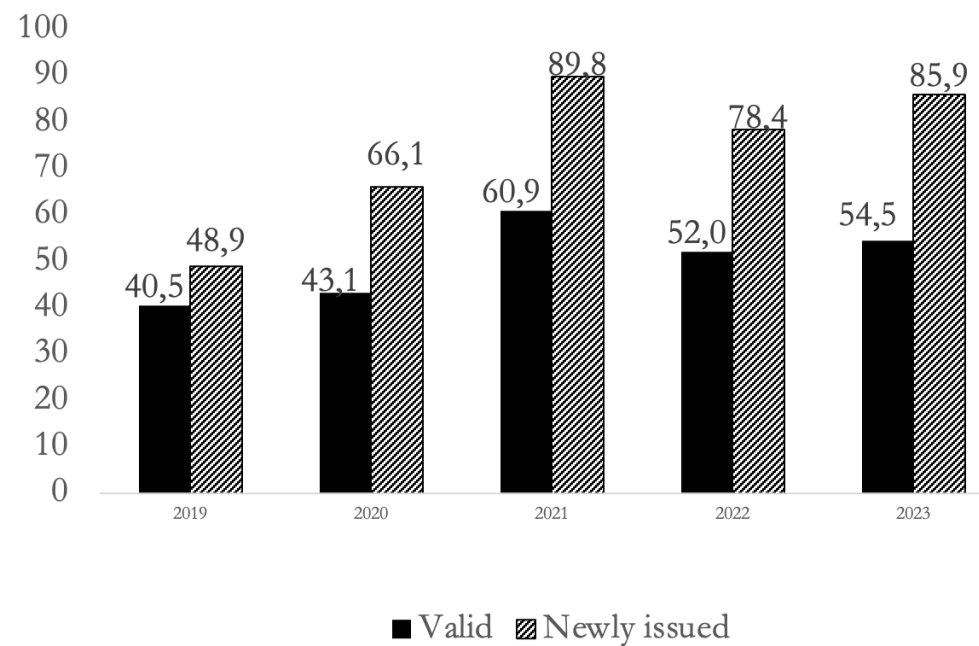
## Findings 4: Postings vs labour supply (iii)

*Driver's certificates (issued to non-long-term TCN residents for up to 5 years)*

1. Driver's certificates (*zaświadczenia kierowcy*) issued to TCNs



2. PDs A1 issued to TCNs in road transport as a share of driver's certificates (%)



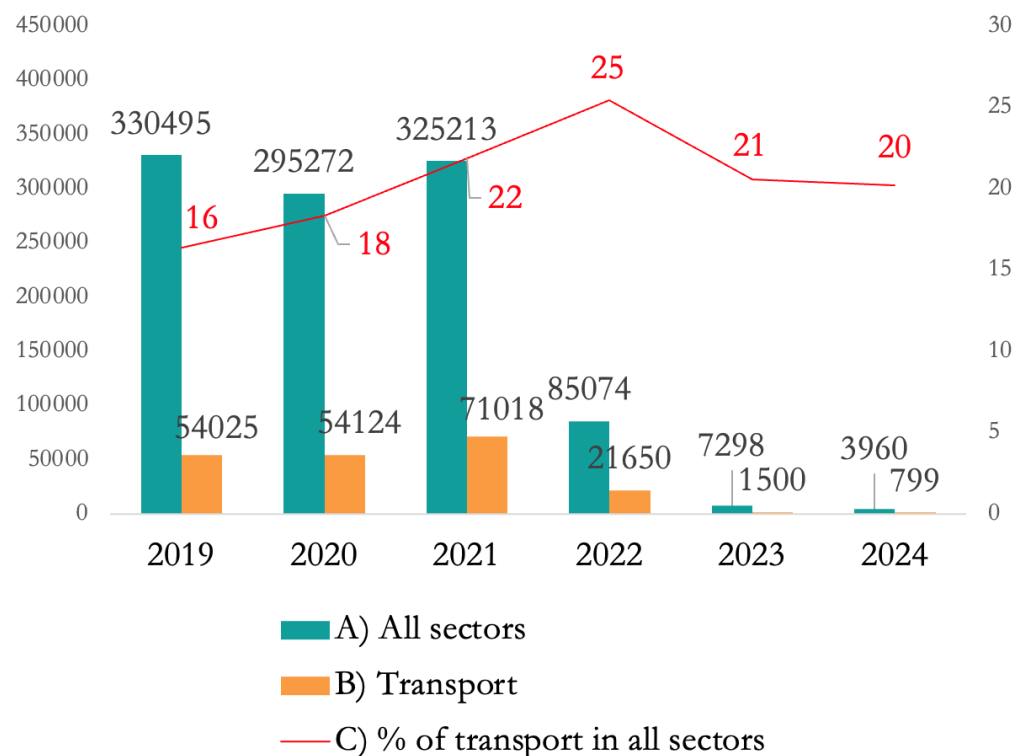
*Source: Chief Inspectorate of Road Transport*



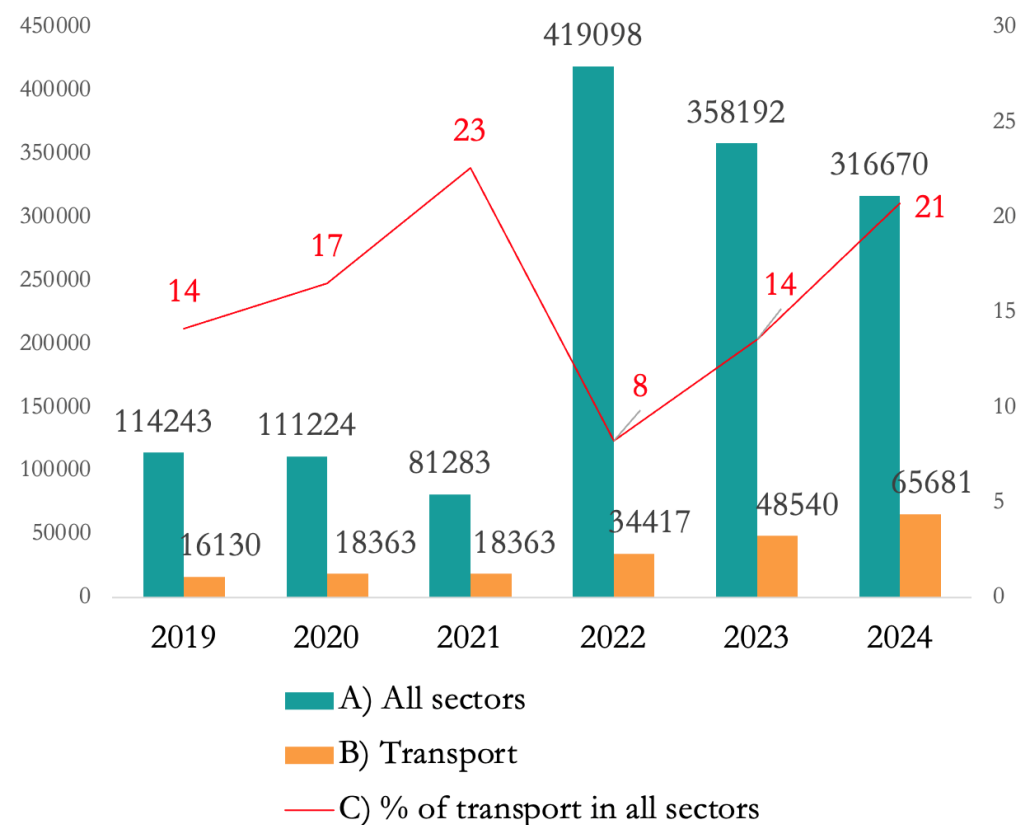
# Findings: Are migrants who are posted from Poland temporary? (i)

*Work permit data*

## 1. Work permits issued to Ukrainians

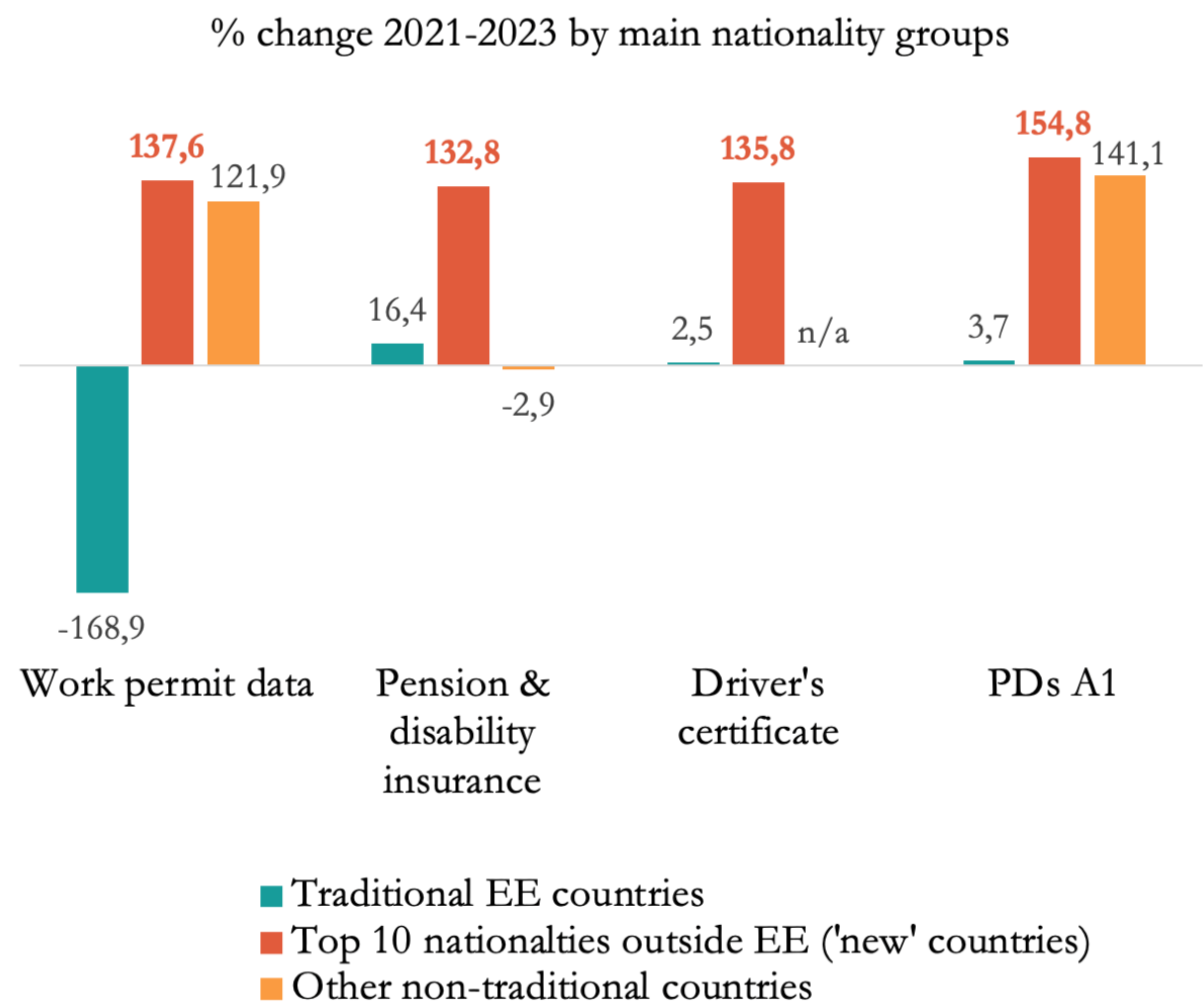


## 2. Work permits issued to non-Ukrainians



*Source: The Ministry of Labour & Social Affairs*

# Findings: Are migrants who are posted from Poland temporary?





# Conclusions

TCNs posted from Poland to work in road transport are playing an increasingly important role in the Polish labour market, as is evident:

- In their growing employment share in road transport
- When examining the relationship between TCNs and changes in labour supply and demand in the sector.

Important ramifications for Poland's road transport sector, characterised by long-term labour shortages:

- The national labour pool shrank
- As did the supply of previously dominant posted workers from 'traditional' Eastern European countries, particularly Ukraine
- This recent gap in 'traditional' migrant labour was filled by temporary labour migrants from 'new' countries of immigration to Poland





## Conclusions (cont'd)

Coupled with the growing importance of posted TCNs in road transport employment, this finding indicates that temporary labour migrants are becoming a ***permanent***<sup>1</sup> feature of the Polish labour market, which is likely to grow further in the future in an increasingly important sector of economic activity.

<sup>1</sup> “***Systematic***” (*Lithuania v Parliament and Council C-541/20*)





Thank you