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# **Workers and firms from Bulgaria, Estonia, Lithuania and Romania in Norway**

**Fafopaper**  
2020:04



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ISSN 0804-5135

# Foreword

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This project has been commissioned by Fafo Institute for Labour and Social Research (Fafo) in Oslo, Norway. We have been asked by The Norwegian Labour Inspectorate to map the situation and the possible challenges faced by workers and firms from Bulgaria, Estonia, Lithuania and Romania when taking up jobs and contracted assignments in Norway. The results from this survey will be used in an information campaign aimed at employers and employees in these four countries, with the aim of increasing knowledge about labour rules and regulations in Norway.

The campaign is headed by a Norwegian operational project team and cross-national reference group. We wish to thank our contact person in The Norwegian Labour Inspectorate, Pål Lund. We also wish to thank the contributors from the four countries: University of Tartu (Estonia), European Institute of Romania, Balkan Institute for Labour and Social Policy (Bulgaria) and Lithuanian Social Research Centre.

Oslo, February 2020

Anne Mette Ødegård (head of project) and Kristine Nergaard

# Workers and firms from Bulgaria, Estonia, Lithuania and Romania in Norway

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Anne Mette Ødegård & Kristine Nergaard



# Mapping:

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- Characteristics of the labour migrants in Norway
- Firms and posted workers in Norway
- Unemployment, regulations and industrial relations in the home countries
- Motivation for emigration and geographical differences
- Challenges and need for information in Norway
- Sources of information (home and in Norway)



We have gathered information about the labour migrants from these four countries living in Norway: age, sex, period of residence, where they have settled in Norway and which sector they are working in.

Subsequently, we will give a brief overview of the situation in the different countries concerning unemployment, wage regulations and industrial relations, including coverage of collective agreements. This is just to illustrate what kind of labour market regimes the workers and firms might be familiar with.

Then we have asked about the main motivations for emigration from these four countries. In addition, we wanted to see whether there were any geographical differences, i.e. if there any special regions in each country where emigration is more widespread.

We have also gathered information from the Tax Authority about firms on temporary contract assignments in Norway and the number of posted workers.

And last, but not least, we will summarise the possible challenges that both firms and workers might face in Norway and what kind of information sources that are available.

## Methods and sources

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- Reports from inspectorates and researchers in the four countries
- Statistics from Statistics Norway, The Norwegian Labour Inspectorate, the Norwegian Tax Administration and the Service Centre for Foreign Workers
- Interviews with inspectors and the Service Centre for Foreign Workers
- Reports from embassies in Norway
- Previous research from Fafo Institute for Labour and Social Research

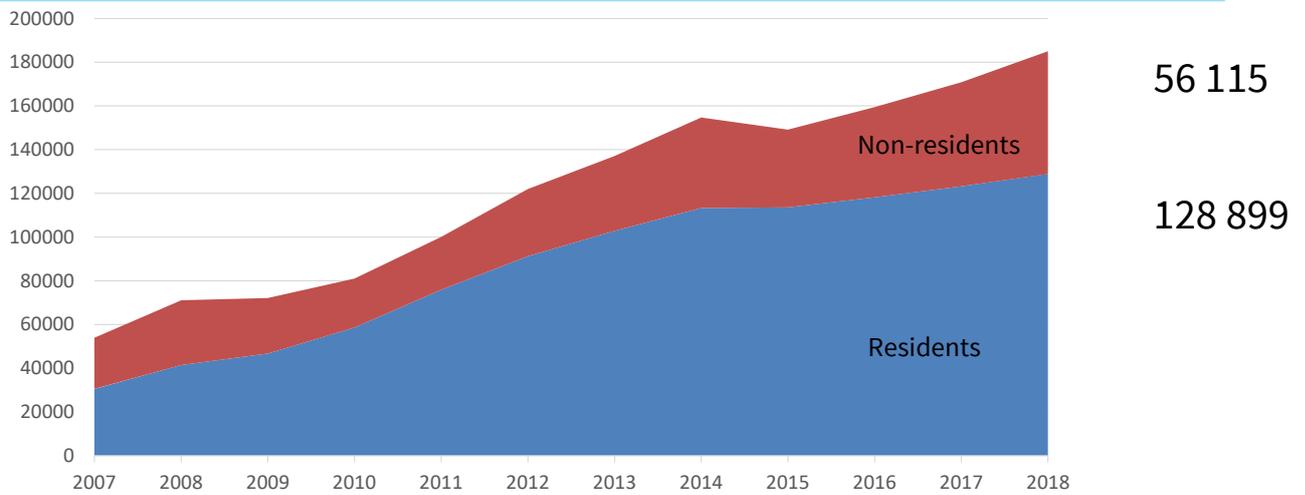
As you can see, we have used different sources in this project. Of particular importance are the reports from four researchers from: University of Tartu (Estonia), European Institute of Romania, Balkan Institute for Labour and Social Policy (Bulgaria) and Lithuanian Social Research Centre.

The researchers received a questionnaire from Fafo encompassing the most relevant topics: estimates on emigration to Norway and other countries, sectors, geographical differences (emigration from different parts of the country), main motivations for leaving, information about firms/self-employed workers taking up business in Norway or other Northern European countries, information sources about Norwegian wages and working conditions, information sources for firms/self-employed workers, and public discussion about emigration.

The labour inspectorates in the four countries were also contacted and asked the following questions: have they been contacted by workers/firms in Norway or are they planning to go to Norway, have they had contact with the Norwegian Labour Inspectorate concerning workers and firms in Norway, information channels, and what is the kind of information that workers and firms will need, and finally their expectations with regard to an information campaign.

In Norway, we have gathered statistics and information from the most relevant sources. Additionally, previous work undertaken by our own researchers at Fafo represents an important contribution.

## Labour immigration from the EU-11 2007 – 2018



Source: Statistics Norway.

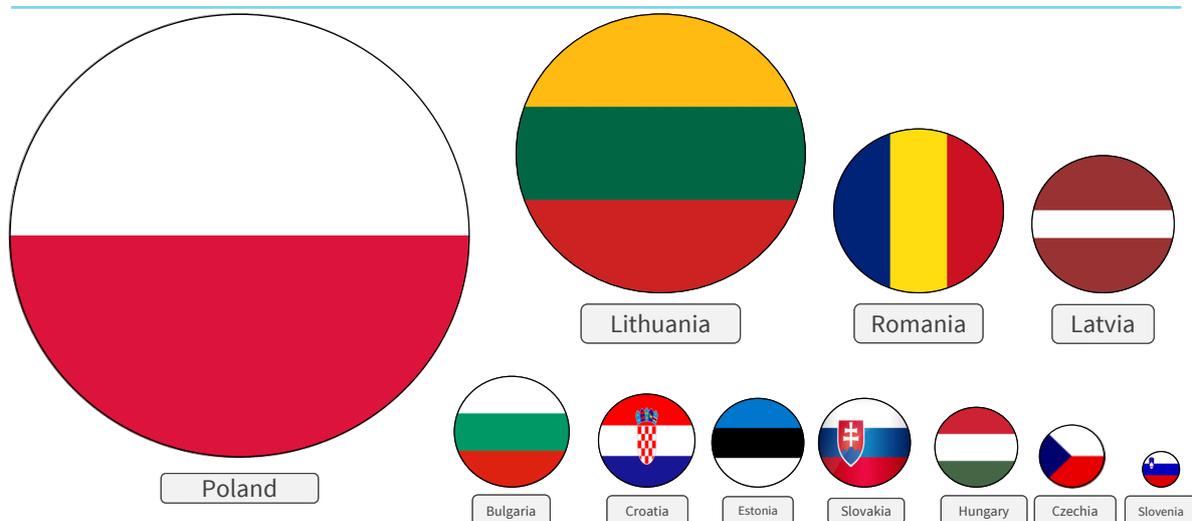
Since the EU enlargements in 2004, 2007 and 2013 (Croatia), Norway has become a very popular receiving country for workers from Central and Eastern Europe. This is the broad picture – presenting the total labour immigration from 2007 to 2018: Poland, Lithuania, Latvia, Estonia, Slovakia, Slovenia, Hungary, Czechia, Bulgaria, Romania and Croatia.

The blue field shows the people that have settled in Norway, almost 130 000 in total. The red field shows the number of people travelling to and from Norway, working here for certain periods. These numbers are solely for employed/self-employed workers, and do not include family members, children and others outside the labour market.

The Norwegian labour market constitutes approximately 2.7 million people in total.

Source: Statistics Norway.

# Where do they come from?

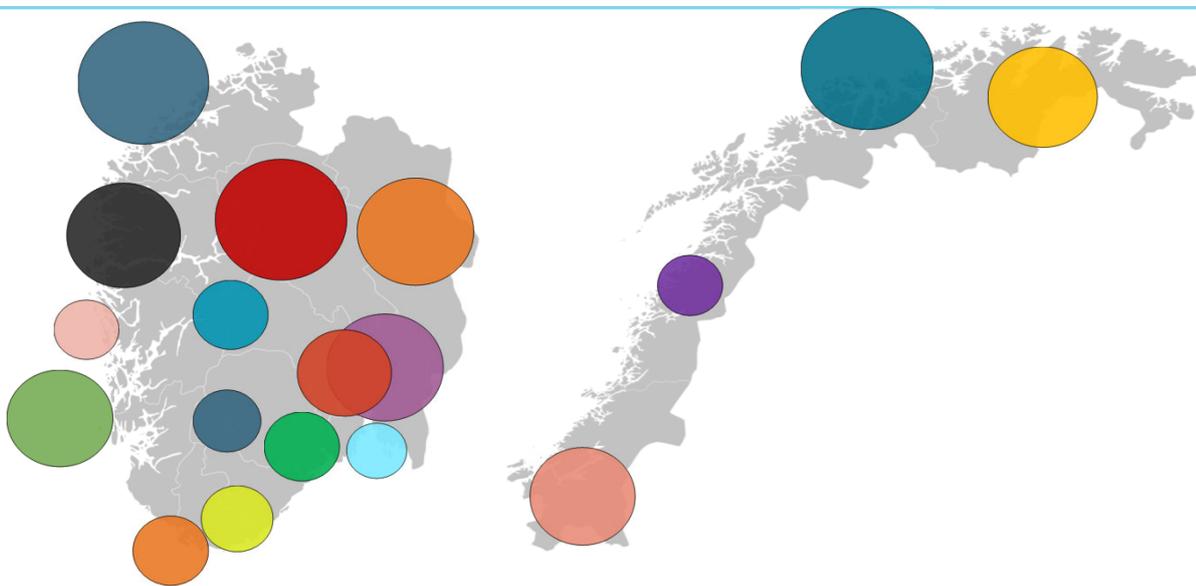


Source: Statistics Norway.

Taking a closer look at the employed people from these countries, Poland absolutely dominates. More than 80 per cent of the workers from these 11 countries come from Poland, Lithuania and Romania. Polish workers constitute more than half of the immigrant population.  
Source: Statistics Norway.

# Where do labour immigrants live? Adjusted for total population

Source: Statistics Norway.



This map shows where the immigrants from the eleven newest EU Member States have settled, and is only meant as an illustration of how scattered this settling has been. These immigrants live all over Norway.

The numbers are adjusted for the total population, and the largest share of immigrants is found in the northern part of Western Norway (shipbuilding), North Norway (fisheries industry) and Central Norway (agriculture).

## What about our four countries?

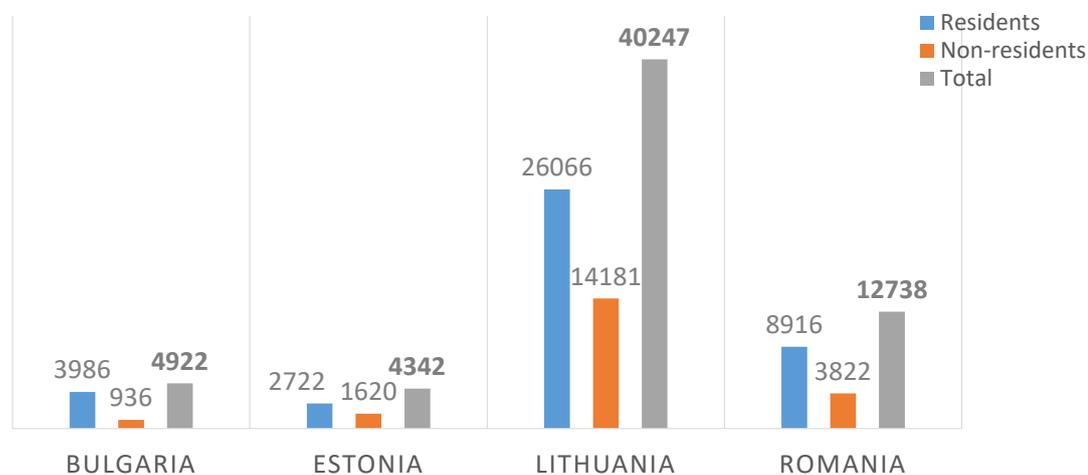
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- How many?
- Where in Norway do they live and work?
- Age and sex?
- Industries?
- New in the Norwegian labour market?



Having provided this information about the overall picture, we will turn to immigrants from the four countries that we are examining.

## Employees per 2018



Source: Statistics Norway

These numbers are for the 4<sup>th</sup> quarter 2018. The total number from Bulgaria is 4 922, whereof 3 986 have settled. The corresponding numbers from Estonia are in total 4 342, whereof 2 722 have settled. This means that 37 per cent of the people from Estonia are non-residents. Lithuanians show some of the same pattern, with 35 per cent of the total of 40 247 people living outside Norway. Among the Romanians, the share of non-residents is 30 per cent of a total of 12 738 employees.

It is reasonable to assume that non-residents are the most vulnerable employees, mainly due to lack of knowledge about Norwegian regulations, compared to resident workers.

## Where in Norway do they live and work?

	Bulgaria	Estonia	Lithuania	Romania
East Norway, except Oslo	687	765	6244	1765
Oslo	1161	676	5076	2374
Inland Norway	528	515	5364	742
South-East Norway	343	222	4421	1083
West Norway	949	594	8708	3437
Central Norway	669	641	5360	1638
Northern Norway	421	627	3317	1425

Source: Statistics Norway

For residents, the numbers are for the region where they live, and for non-residents, the region where they work. We can assume that the residents for the most part work in the region where they live.

Immigrants from Bulgaria, Estonia, Lithuania and Romania work and live in most regions of Norway. There are no distinctive differences between the four countries, or between residents and non-residents. The distribution across regions is also more or less the same as for non-immigrants.

There are especially many immigrants in West, Central and East Norway. but the same applies to Norwegians.

East Norway except Oslo: Østfold & Akershus

Inland Norway: Hedmark, Oppland, Buskerud

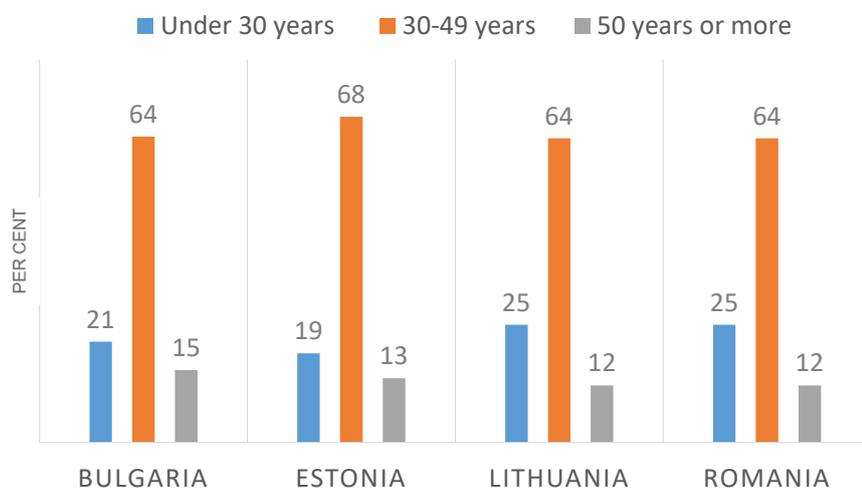
South-East Norway: Agder, Telemark, Vestfold

West Norway: Rogaland, Hordaland, Sogn & Fjordane

Central Norway: Trøndelag, Møre & Romsdal

North Norway: Nordland, Troms, Finnmark

# Age

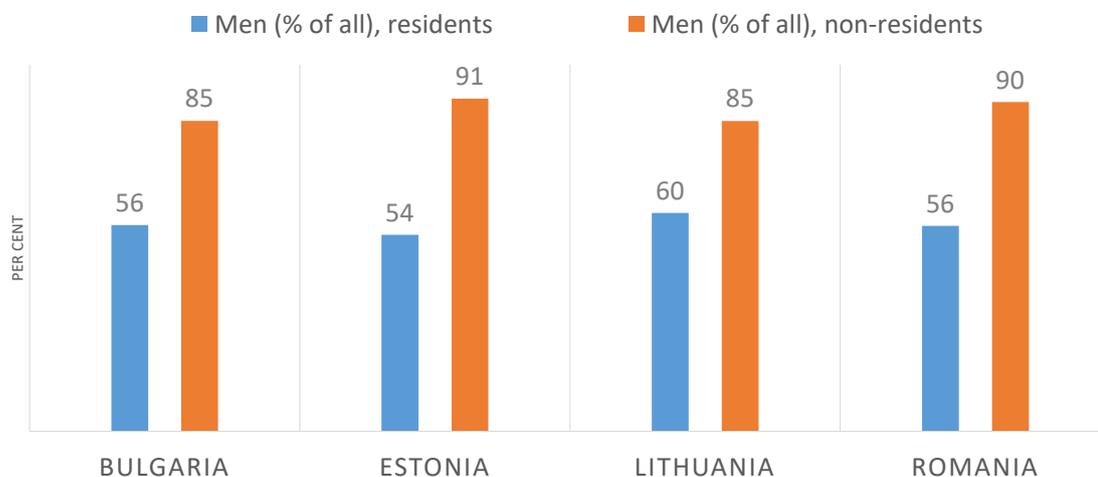


Source: Statistics Norway

The numbers show the proportions according to age group: under 30 years, 30-49 years and 50 years and older. We find the majority are between 30 and 49 years (65%). In total, 23% are under 30 years, while among the non-residents the youngest workers constitute 29%. The total share of workers 50 years and older is 12%, and is the same among residents and non-residents.

There are no major differences between the four countries.

# Male domination



Source: Statistics Norway

Of the workers from these countries in Norway, the majority are men. Among the residents the difference is quite small (42% women vs. 58% men). When we look at the non-residents, this group is absolutely male-dominated (a share of 86%).

The pattern is more or less the same for all four countries.

## Number of firms and posted workers 2018

	Firms with contracted assignments in Norway	Workers posted to Norway
<b>Bulgaria</b>	113	394
<b>Estonia</b>	115	1432
<b>Lithuania</b>	136	6 426
<b>Romania</b>	133	1 303

Shown here are the number of firms and the number of posted workers in Norway in 2018, from these four countries, collected from the Norwegian Tax Administration.

Posted workers count as non-residents, but in addition to these are seasonal workers and people that are commuting.

Construction is the predominant sector among posted firms and workers.

The reports from the researchers in the four countries are unable to give us more information about firms taking up business in Norway. There are no official data or statistics at the national level.

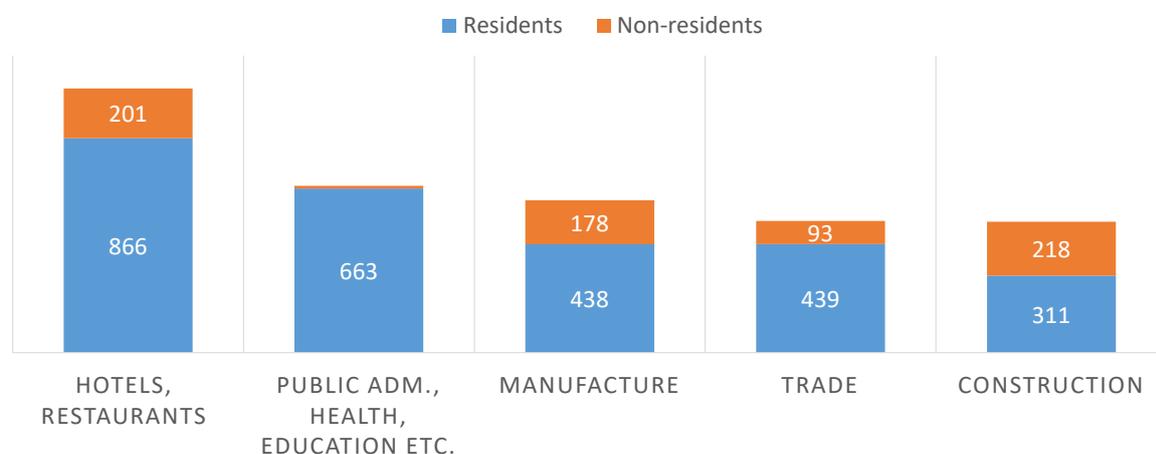
One of the challenges connected to posting is the lack of accurate data all over Europe, both on the number of workers and on what kind of working conditions are applicable to them in the countries where they are posted. Many countries have established mandatory registration systems for foreign service providers/posted workers, but these do not exist everywhere, nor are they comparable across sectors and countries.

# Where do they work?



As mentioned, among the posted workers construction is very important. However, especially among residents, the picture is more complex. The immigrants have found their way into many different industries, both in the private and public sector.

## Bulgaria – top 5 industries



Source: Statistics Norway

Among the Bulgarians, 22 per cent work in hotels and restaurants. The majority work in restaurants/staff canteens. Second on the list of industries for the Bulgarians is public administration, and the majority work in education and health/social care. There are very few non-residents in these two industries, meaning that the employees here have settled in Norway. When it comes to manufacturing, we find many in the food industry and waste disposal (sub-sectors).

The main occupations are:

Crafts, plant and machine operators (1394)

Service and sales workers (1265)

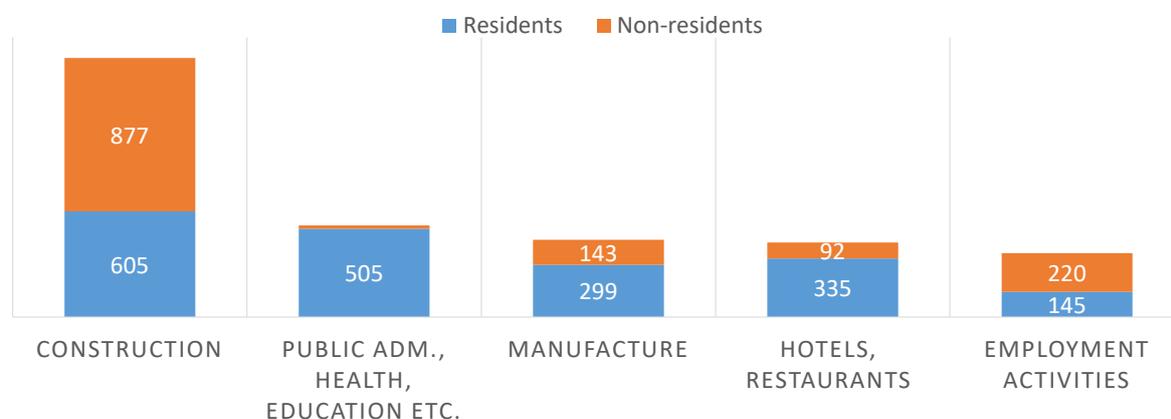
Elementary occupations (1110)

Professionals, technicians, managers (819)

More specifically, many employees work as cleaners, personal service workers (incl. chefs and waiters), and kitchen assistants, drivers and refuse workers.

Among professionals we find health personnel and teachers.

## Estonia – top 5 industries



Source: Statistics Norway

Construction is the predominant industry among the Estonians (34%), and there are especially many non-residents in this industry. The employees in public administration etc. are residents working in health, social care and education. The food industry is important for manufacturing workers from Estonia. Other industries: various sectors incl. temporary employment agencies (employment activities, 8%).

Main occupations:

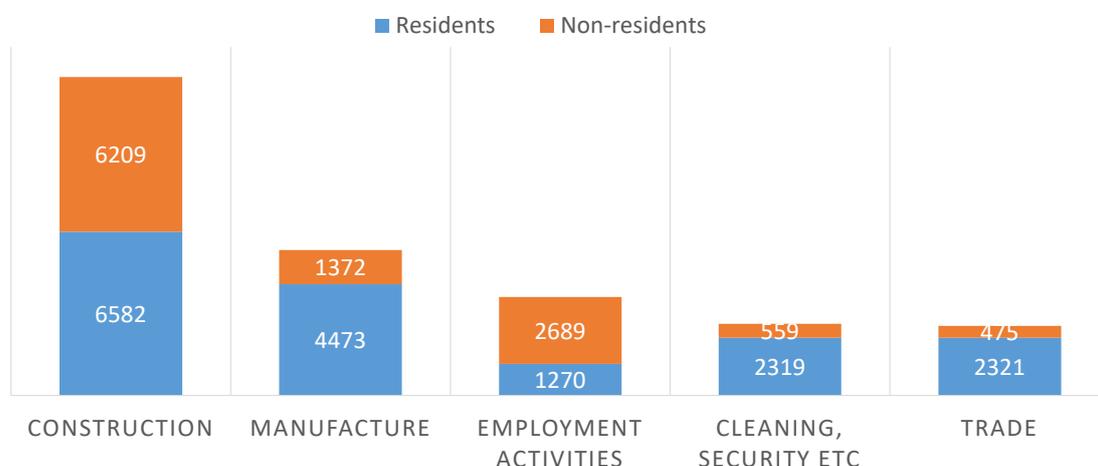
Crafts, plant and machine operators (1783)

Professionals, technicians, managers (799)

Service and sales workers (633)

Elementary occupations (481)

# Lithuania – top 5 industries



Source: Statistics Norway

Construction is the predominant industry (32%), and also employs many non-residents. The second largest industry is manufacturing, and many of the workers are also in the food industry. The majority are residents. Employment activities (temporary agencies) account for 10%, many of whom are non-residents. Among workers hired by temporary agencies, there are many in construction.

Main occupations:

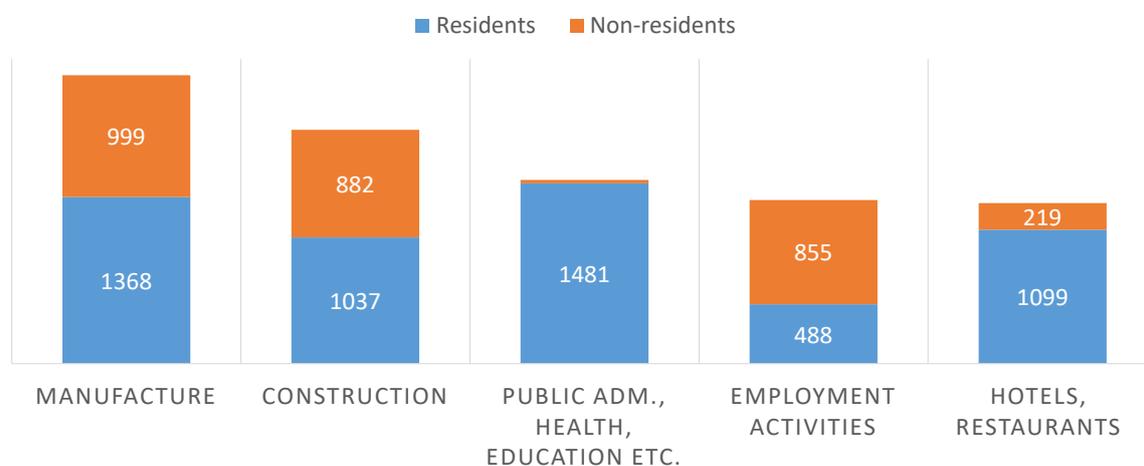
Crafts, plant and machine operators (20647)

Elementary occupations (7900)

Professionals, technicians, managers (4035)

Service and sales workers (3621)

# Romania – top 5 industries



Source: Statistics Norway

Manufacturing is the largest industry employing Romanian workers (19%). Many of them are found in the food and the metal/machinery industry. Construction is the second largest industry (14%). There are many non-residents in manufacturing, construction and employment services (49% in these three sectors). Among those employed by temporary employment agencies, there are many working in construction. Among service and sales workers we find employees in services (such as waiters and chefs), sales and social care jobs. Among professionals we find healthcare personnel, engineers and teachers (the three largest groups).

Main occupations:

Crafts, plant and machine operators (5234)

Elementary occupations (2690)

Professionals, technicians, managers (2064)

Service and sales workers (1903)

## Characteristics of national labour markets



The national labour markets in the EU/EEA countries differ substantially from each other. Our assumption is therefore that workers and firms from other countries have limited knowledge about how the Norwegian labour market functions.

## Unemployment, minimum wage and industrial relations

	Unemployment	National minimum wage	Covered by collective agreements	Union density
<b>Bulgaria</b>	5.2 %	Yes	Around 25%	Around 20%
<b>Estonia</b>	5.4 %	Yes	18%	Around 6%
<b>Lithuania</b>	6.2 %	Yes	15-20%	Around 8%
<b>Romania</b>	4,2 %	Yes	Below 25 %	Around 25 %
<b>Norway</b>	3,9 %	No	Around 70 %	Around 50 %

This slide shows first, the level of registered unemployment, second, regulation of wages, third, the share of workers covered by collective agreements, and fourth, the share of workers that are members of a trade union.

An important feature of the Norwegian labour market model is the cooperation between employers and workers' representatives at company, industry and national level. This system is dependent on a high union density and an extensive coverage of collective agreements. There is no statutory minimum wage in Norway, because pay is the responsibility of the social partners. Some of the industry-level collective agreements are made generally applicable, typically in industries with many immigrant workers (construction, shipbuilding, cleaning, farming, fish-processing industry, transport, hotels and restaurants).

## National minimum wage, hourly rate 2019

<b>Bulgaria</b>	€ 1.62
<b>Estonia</b>	€ 3.10
<b>Lithuania</b>	€ 3.39
<b>Romania</b>	€ 2.54
Norway – minimum hourly rate in construction (extended collective agreement).	€ 18.90

Source: Eurofound: Minimum wages in 2019. Annual review

The wage level in Norway is among the highest in Europe. During the last 15-20 years, this has been combined with labour shortage in many industries. These two factors explain the high level of immigration to Norway.

The table shows the national minimum wages in the four countries in 2019. The Norwegian minimum wage (extended collective agreement) in construction is shown for comparison. For a Bulgarian, the hourly rate in Norway (in construction) is more than ten times the national rate at home.

However, it is important to bear in mind that the cost of living is high in Norway.

## Motivations for leaving home



**Bulgaria:** - higher salaries, better social systems, better health care

**Estonia:** - higher salaries, working conditions and work culture

**Lithuania:** - higher salaries, low level of economic development at home, personal life conditions

**Romania:** - higher salaries and living standard

Based on the previous information, the motivations for leaving home should be quite clear: money talks. Our previous research at Fafo is also confirmed by these reports from Bulgaria, Estonia, Lithuania and Romania.

Our report from Romania states: 'By working 5-6 months in a Western European country, a worker can earn the equivalent of more than 12 months' wages at home'. In addition, from Bulgaria: 'The Bulgarians emigrate mainly because of the prospect of higher salaries, even when there are no legal provisions that guarantee their receipt'.

But other factors also matter. A study from Lithuania in 2017 showed that personal life conditions, family reasons and political corruption in Lithuania were important pull factors (Valiuniene et al., 2017).

For Estonians, factors such as 'self-actualisation and broadening one's horizons' are also mentioned.

## Where do they leave from?

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**Bulgaria:** Northwest of the country. The poorest region

**Estonia:** Smaller counties with lower average income and higher levels of unemployment

**Lithuania:** Smaller towns and villages where it is difficult to find a job

**Romania:** All over the country except a few more developed cities. Region close to the Black Sea (shipbuilding industry)

We also wanted to know whether any particular regions of these countries have especially high levels of emigration.

The report from Bulgaria shows that more than 11 100 people left the three districts of Vidin, Vratsa and Montana in 2018.

In Estonia, its proximity to Finland enables pendulum migration from Tallinn and Harjou county.

In Lithuania, Utena county experienced the highest international emigration in 2018. This was also among the counties with the highest unemployment rate in the country.

# Where do they go?



**Bulgaria:** Germany, Spain, Greece, UK and Italy

**Estonia:** Finland, Germany, Russia and UK

**Lithuania:** UK, Germany, Norway, Ireland

**Romania:** Italy, Germany, Spain and UK

We asked whether there are any estimates of how many labour migrants emigrate to Norway. As expected, it is difficult to give exact numbers. Norway is not among the main receiving countries, except for Lithuanians.

More than 90% of the Bulgarian emigrants move to another EU member state, and have no formal obligation to inform public authorities in Bulgaria of their move. According to data from Eurostat (2019), around 900 000 Bulgarians live abroad.

The precise number of emigrants from Estonia is unknown. Since 2015 there has been a reversal in the migration trends with a positive inflow of people back to Estonia, many of whom are Estonians returning home.

Lithuania's fall in population is approximately 30 000 people on average per year. Since 1990 the population has fallen by 23% (Gruzevskis, Blaziene 2018).

The number of Romanians in Norway has increased sevenfold from 2009 to 2018. Today, Romania is facing a deficit of labour in almost all sectors. Unemployment is low, and most of the employers complain of labour shortages.

## Who emigrates?

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**Bulgaria:** Low-skilled workers (health care, construction, hotels and restaurants, beauty services)

**Estonia:** Construction workers and healthcare workers (nurses, care workers and doctors)

**Lithuania:** Low-skilled workers are the dominant group. Accelerating emigration of medical personnel and researchers

**Romania:** Low-skilled workers, skilled workers from the shipbuilding industry, construction, health care and the petroleum industry

The predominant groups are those mentioned here. However, as we have seen from the Norwegian statistics, many professionals who have completed tertiary education also seek jobs abroad. This is also reported from the researchers in the four countries. Many Bulgarian emigrants work in highly reputable corporations, universities and hospitals. In Estonia, the public debate about emigration is often connected to nurses and doctors. Also in Lithuania there is a focus on emigration of medical personnel and researchers.

## **Inspectorates in the four countries: Questions and cases from workers/firms**

- Lack of knowledge of Norwegian regulations in the inspectorates – some learning gained from visits and joint inspections
- Few questions and cases from Norway
- Some questions about posting third-country nationals to Norway

The answers from the labour inspectorates reflect firstly a low level of knowledge about Norwegian regulations. This is not surprising. Labour inspectorates are supposed to give information and support related to their own national regulations.

Secondly, almost no cases of violation of working conditions are reported back, i.e. from posted workers that are employed by firms from the respective countries.

Thirdly, some of the inspectorates refer questions from firms planning to take up activity in Norway to EURES .

When the matter concerns posting of third-country nationals, the inspectorates can confirm the legal status of the employment relationship.

## What kind of information is needed?



pixers

‘All kinds of information – procedures for moving and settling, living and working conditions, taxes, wages, whether they are covered by a collective agreement and who to contact in case of trouble.’

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Answers from the inspectorates show that all kinds of information are needed. Working time and employers' obligations are also mentioned.

## What kind of information is needed?



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‘There are companies operating in Norway that do not comply with Norwegian conditions and salaries. The employees themselves often do not know what company they are working for (posted or temporary agency).’

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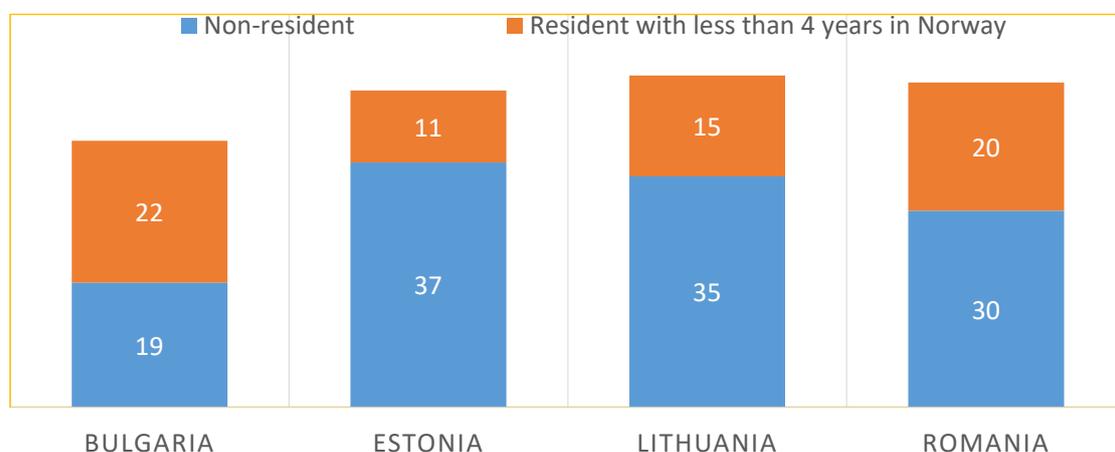
The employees are often confused about who their employer is and to whom they should address their complaints. Need for easily accessible information.

# Challenges and need for information

- Salaries
- Taxes
- Employment contracts
- Living conditions



## 50 per cent newly arrived



Source: Statistics Norway

The definition of a 'new employee in Norway' is less than 4 years of residence, or non-resident. This indicates that about 50 per cent of our population is newly arrived (slightly less among employees from Bulgaria). We have no information about when the non-residents first started to work in Norway.

It is reasonable to assume that the newly arrived have limited knowledge of regulations and legislation in Norway.

- Non-residents (although some of these might have been travelling to Norway for some time), around 20 500 persons
- Resident with less than 4 years of residency, around 10 000 persons
- Many years in Norway (7 years and more): around 20 000 persons

## Challenges and need for information

- Low educational level
- Poor English, no money for language courses
- Do not know the Norwegian system
- Low trust in authorities
- Little knowledge/trust in trade unions
- Do not care about information (!)
- Exploited without realising

There are of course variations between occupations and also between the nationalities. For most occupations in the healthcare sector, you have to speak Norwegian fairly well. Lithuanians often have better skills in English than immigrants from the other countries.

EU citizens are not entitled to free language courses, and many do not prioritise paying for this from their own pockets.

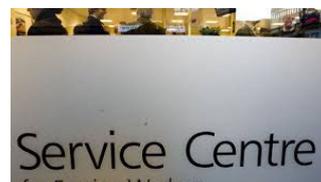
Due to date of EU membership and transition periods, the Bulgarian and Romanians are often considered to be lower on the social ladder than workers from Poland and Lithuania.

The Norwegian labour market system is in general based on informal, small distances between employer and employee, in addition to trust. This implies for example trust between management and employees, and trust in trade unions and the authorities (such as labour inspectorates). This might be a challenge if you are used to a culture with steep hierarchies and low trust in authorities.

Many of the CEE workers do not have positive experiences with trade unions from their home country and/or they have no knowledge about the important role that the trade unions play in the Norwegian labour market

Some of our informants in Norway point out that some immigrants do not care about information as long as they earn their money, and some are exploited without realising it, or they do not know how to obtain the necessary information.

## Visits to service centres for foreign workers 2019



	Oslo	Bergen	Trondheim	Stavanger	Total
<b>Bulgaria</b>	29	3	3	4	<b>37</b>
<b>Estonia</b>	4	1	1	1	<b>7</b>
<b>Lithuania</b>	383	27	21	23	<b>454</b>
<b>Romania</b>	141	15	5	24	<b>185</b>

These are numbers of visits to the Labour Inspectorate's desks in 2019, shown for the four nationalities. These numbers reflect the total number of immigrants to Norway. Service Centres are to be found in Oslo, Bergen, Stavanger, Trondheim and Kirkenes (mostly for Russian immigrants, and not part of our statistics).

## What do they ask about?

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- Unpaid salaries
- Tax
- Working time and extra pay for overtime
- Dismissals
- Employment contracts
- Payslips
- Unemployment benefits

‘The King gives the workers 2 kroner per hour every year’



These are the recurrent questions addressed to the front desks in the service centres for foreign workers. The quote is from social media, and is understandably very far from the truth, but does illustrate the lack of information among some immigrants.



## Sources of information – in general

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- EURES (The European Job Mobility Portal)
- Different websites in home countries – job portals
- Groups on social media
- Recruitment or temporary employment agencies in home countries
- Relatives and friends living abroad
- Embassies
- Ministries of foreign affairs
- Newspaper articles
- Trade union website in Norway (Fellesforbundet) and some sources on European level

There are various channels for sharing information, such as through personal networks, from colleagues in Norway or Norwegian/foreign websites/social media (e.g. Facebook page for Lithuanians in Norway).

In the Facebook groups, people share experiences about moving to, living and working in Norway.

Information about wages and working conditions may also be provided by recruitment or temporary employment agencies in the four countries.

The trade unions, also at European level, have tried to give information about salaries and working conditions in different countries. For example, The European Building Workers Federation (EFBWW), manages a website called European Construction Mobility Information Net (ECMIN).

## Sources of information in Norway

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- Workinnorway.no (NAV, Skatteetaten, UDI, Arbeidstilsynet, Politiet)
- Nyinorge (IMDi)
- Consulting firms established in Norway (many accounting firms and also lawyers)

Seen from the Norwegian side, it should be mentioned that some of these sites are official, such as workinnorway.no (NAV, the Tax Administration, the Norwegian Directorate of Immigration, the Labour Inspection Authority and the Police), but if you search for 'workinnorway' on Facebook, a number of employment agencies appear, looking for employees to work in Norway. The Directorate of Integration and Diversity (IMDi) has a website called 'nyinorge.no', which includes information in Lithuanian.

A recurrent problem with the official pages in Norway is that they are either too general and politically correct, or that they are too difficult and have too much information condensed into one place. The individual worker or firm needs to know: how will this specific regulation or arrangement affect me, in my situation right now.

## New ideas?

- Use channels such as customs services, airports, buses, trains and local police stations
- Information meetings at the embassies
- Phone services on arrival
- Better use of Innovation Norway in the home countries



We asked our informants if they could suggest new information channels for labour migrants. These are the ideas that they came up with:

Information through TV screens and leaflets at airports, in the customs services, on buses, trains and at local police stations; more systematic information meetings at the embassies. This often requires that people travel to Oslo to participate, but would be an important measure since there are so many newly arrived migrant workers. The Romanian rapporteur referred to a meeting organised by the Romanian business leader foundation in Bergen and Oslo, which was attended by more than 100 entrepreneurs living in Norway.

Innovation Norway is mainly directed towards Norwegian businesses abroad, but could possibly also be a contact point for firms that want to start a business in Norway.

## Hopes for an information campaign



- Raise awareness about working conditions
- Make it easier to find the right information
- Increase knowledge about regulations in Norway
- Promote decent work

Public authorities in the EU/EEA countries have set up websites that provide information. However, the presentation of this information is not further streamlined by the authorities. Thus, how clear, transparent and comprehensive the information is, and how easy it is to find, varies between different countries. Easy access to comprehensive information also depends on the wide variations between countries in how complex the regulations on wages and working conditions are. For instance, it is more difficult to give information about conditions applicable in a country where the wages and employment conditions laid down in collective agreements vary between industries and even regions.

But there is still hope, as summarised above. Not only for more transparent and easy information, but also that such information can raise awareness about working conditions and decent work in general.



# Workers and firms from Bulgaria, Estonia, Lithuania and Romania in Norway

The national labour markets in the EU/EEA-countries differ substantially from each other. Our assumption is therefore that workers and firms from other countries have limited knowledge about how the Norwegian labour market functions.

The results from this project reveal a considerable lack of information among labour immigrants from Bulgaria, Estonia, Lithuania and Romania. The knowledge that is gathered will be used in an information campaign aimed at workers and firms that are planning to take up work in Norway.



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