



Research article

Revisiting European migration industries amid the Covid-19 pandemic: Changes in the recruiting practices of Bulgarian agencies

Boris Popivanov^{1,3,*} and Siyka Kovacheva^{2,3}

¹ Department of Political Science, Sofia University “St. Kliment Ohridski”, Bulgaria

² Department of Applied Sociology, Plovdiv University “Paisii Hilendarski”, Bulgaria

³ New Europe Centre for Regional Studies, Plovdiv, Bulgaria

* **Correspondence:** Email: bpopivanov@phls.uni-sofia.bg; Tel: +35928701193.

Abstract: Workforce mobility in the European Union (EU) has faced enormous challenges regarding the outbreak of Covid-19 in 2020. Member-states reacted by imposing border closures and eliciting travel restrictions and sanitary measures, some of which continued well into 2022, with far-reaching consequences in all areas of mobility experience. In a time of constant changes in the regulations of the internal market, the work of labour market intermediaries deserves special attention. Recent studies have shown that, being a relatively new EU member-state, Bulgaria managed to develop an important migration industry comprising a complex network of public and private actors. We focus on an interpretative analysis of ten in-depth interviews conducted in 2017 with practitioners working in such agencies, and ten follow-up interviews five years later. The comparative analysis of these intermediaries’ reflections on the mobility policies and practices before and during the pandemic allows us to examine the processes of structural and functional adaptation in the industry in multiple dimensions: assessment of changes in mobility practices, perceptions of employers’ and migrants’ needs and expectations, and the challenges facing their agencies vis-à-vis the role of other actors in the field. The conclusion underlines trends and transformations which are of interest for the developing recruitment sectors in other Central and East European countries, as well as for the dynamics of the East-West labour mobility throughout the entire EU.

Keywords: Bulgaria; European mobility; international labour intermediaries; labour mediation; migrant workers; migration industry; mobility policies

1. Introduction

The regulation of labour mobility proved to be one of the issues of central concern for European Union (EU) institutions at the outbreak of Covid-19 globally. As early as March 2020, the European Commission officially warned that “the Member States should allow the workers holding essential occupations to cross borders and establish specific procedures to ensure a smooth passage for such, so that these workers can exercise their occupations without undue hindrance.” [1] However, questions about the situation, status, and rights of these cross-border workers in the European labour markets under the sign of the pandemic have since remained open.

The well-known truth is that workforce mobility in the EU has faced enormous challenges with the outbreak of Covid-19. Member-states reacted by imposing border closures and eliciting travel restrictions and sanitary measures, some of which continued well into 2022, with far-reaching consequences in all areas of the mobility experience [2]. Existing research has found that different countries follow similar policy choices in their responses to the pandemic, informed by mutually adapting cost-benefit policy models [3]. This convergence has nevertheless resulted in adopting differing timelines and sequences of these measures, alternatively called non-pharmaceutical interventions (NPIs). In a situation of constant changes in the norms regulating the internal market, research into the work of labour market intermediaries deserves special attention. After all, mediation in the context of fast changing rules is presumably more important than one during less “interesting” times. Regarding the framework of EU mobility, such mediation involves rethinking the generally accepted division between migrant-sending and migrant-receiving countries. The impact of Covid-related changes on the labour recruitment sectors of the traditionally migrant-sending countries of Central and Eastern Europe (CEE) should be particularly addressed.

This task largely corresponds to the agenda of a research trend which considers international labour intermediation as an increasingly essential part of the infrastructure of labour mobility. In particular, the seminal work of Gammeltoft-Hansen & Nyberg-Sørensen [4] called for a multi-spectred approach to labour mobility that links various components of migration systems together and establishes the complex agency of labour brokers within the so-called migration industry. This appeal has been subsequently extended to CEE contexts, which have been underlined in a study as representing “specific pools of labour” in the EU labour markets ([5], p.564). Besides, the latter study explicitly pinpointed the strong dependence of CEE recruitment sectors on “favourable circumstances” ([5], p.571).

However, further insights on the topic have been scarce. The occurrence of the Covid-19 pandemic has highlighted the additional issue of adaptation of recruitment sectors to what may be labelled as “unfavourable circumstances”. This article attempts to address the existing gap by focusing on CEE labour intermediaries affected by pandemic-related changes. Until now, contributions have accessed the vulnerability of the East-West European labour mobility under Covid-19 mostly through the perspectives of migrant workers [6,7] and employers [8]. Perceptions of recruiters seemed to have been left behind. This is where our own contribution stands: in acknowledging the importance of the recruiters’ perspective in the mobility process under pandemic conditions. The article is set to enlarge our knowledge regarding crisis-related transformations of the intra-EU labour mobility in terms of both the structural adaptation of CEE recruitment sectors and the functional adaptation of migration systems components.

Of all the CEE examples, Bulgaria is chosen as the case study for our research, due to several reasons.

Like other countries in the region, Bulgaria has experienced several waves of emigration to the west of Europe, at first prompted by political instability in the first half of the 20th century and then

later by communist oppression in the second half of the century [9]. Travel for work became much easier after the collapse of the communist regime in 1989, and migrants predominantly used unofficial channels such as tourist agencies and informal contacts with relatives and friends living abroad [10]. According to one study ([11], p.7), Bulgaria happened to be among the former Soviet bloc countries with the highest impact of the “push factor” for emigration due to the severity of the economic crisis in the 1990s.

Obtaining full membership into the EU in 2007 has opened new perspectives for the country, including labour mobility across the Union [12], but has also exposed recurrent problems with corruption and economic laggardness. Indeed, research has shown that entry into the EU might even increase corruption levels, as imposing new sets of regulation paves new avenues for corruption [13]. The fourth round of the European Quality of Government Index, conducted in 2021, confirmed Bulgaria’s low ranking in the Index both nationally and in terms of regional varieties, and suggested that this lower quality brings about more worries regarding economic and health consequences of the Covid-19 pandemic [14]. Since 2007, Bulgaria has retained their unenviable status as the poorest EU member state in terms of GDP per capita. Large payment gaps between the country and Western Europe have emphasised the complex issue of integration in the EU labour market [15]. Again, the Covid-19 pandemic seems to be a focal point for pre-existing trends in workforce mobility. A World Bank-sponsored study recently established the high vulnerability of Bulgarian mobile workers in the EU to health and job-loss risks during the pandemic, which was largely due to conditions of employment [16].

The latest National Population Census estimated that, over the period 2012–2021, approximately 344,000 people left Bulgaria for emigration purposes. This corresponds to an approximately 40% of the overall population decline for the period, which was the largest number since the democratic changes. Moreover, this statistic is accompanied by a survey which found that 19.9% of Bulgaria’s remaining population aged 15–74 are either very or somewhat likely to emigrate in the near future [17].

The considerations above briefly outline the reasons why Bulgaria is an interesting case for studying trends and changes in labour mobility under pandemic conditions, especially regarding the structural environment and actors that shape it. As previously discussed, in the past migration has been primarily an individual activity relying on informal channels. Increasingly high levels of regulation in European labour markets, the need for labour protection, as well as the growing role of information for the success of the mobility experience highlights the increasing issue of labour intermediaries. Bulgaria also deserves attention because of the specific challenges facing this sector. Recent studies have shown that being a relatively new EU member-state, Bulgaria managed to develop a labour recruitment sector of some importance, comprised of a complex network of public and private actors. The development stage of this sector has been assessed as an “industry in the making”, one that has been already established in terms of the availability of actors, relationships, infrastructure, and practices, but still without a tradition and internal potential to openly influence its partners [18].

The focus of this article falls on the changes in the Bulgarian labour recruitment sector (“migration industry”), which have been caused by the Covid-19 pandemic. More specifically, the article poses the following questions: how do labour intermediaries assess the changes in mobility practices; how do they perceive employers’ and migrants’ needs and expectations; and how do they see the challenges facing their agencies vis-à-vis the role of other actors in the field?

2. Migration industries facing pandemics

The role of international intermediaries in the framework of the labour market has often been considered as a complex ensemble of actors and practices rather than just as isolated and separate activities of different public and private bodies [4]. The combination of public and private structures in this process could raise objections. The term “migration industry”, which is used to denote the set of agents and practices mediating the migration of people, was originally referred to as private intermediaries. Salt and Stein, who popularised the term, saw the migration industry as a business that exists for profit. The role of public institutions was perceived as creating and implementing rules, not as mediating [19]. However, this division has been aptly rejected by later scholars as artificial. For instance, emphasis was put on functions rather than motivation of mediators, and thus the migration industry began to be understood as a meso-structure located between large-scale institutional factors, on the one hand, and networks, practices, and beliefs of the migrants, on the other [20]. Since public sector actors represent an essential part of the labour brokerage, they could be rightfully included in the conceptualisation of the migration industries [21]. This is basically the way how the “migration industry” broke its way in the recent literature of labour mediation [4].

There are two important features that inform the view of the independent and central role of labour recruiters. First, intermediaries act on the labour market in a transformative fashion, and not simply as facilitators, so that they must be admitted as actors actively constructing the field of transborder mobility [22]. Next, intermediaries are an element of the triangle potential workers—recruiters—potential employers, though this triangle is not recognised as equilateral. On the contrary, research shows that employers exert more influence than other actors in the labour mobility process. For this reason, the role of mediators should be interpreted through the premise of the outlined asymmetry [23,24].

The effects of the Covid pandemic on labour markets are multi-spectral. An extensive literature review of studies before the outbreak of the disease summarises key determinants of responses to NPIs, with an emphasis of raised public concerns regarding job and income security when the home office is hardly available and school closures affect childcare [25]. Among the various strands of impact one could further mention are the following: the self-awareness of citizens and the self-enforcing dynamics of voluntary de-mobilisation in reducing labour mobility and economic activity [26]; the influence of public attitudes on shaping the environment of incentives for adoption of measures [27]; the cross-cultural variation in risk perception across the world and its close relation to confidence in the institutional framework [28]; and the unequal effect of restrictions across different socio-economic groups necessitating differentiated approaches to mobility [29]. All these studies, by no means exhaustive, acknowledge the importance of communication and timely sharing information for labour market adaptation to Covid-conditions. Early research has found that Covid-19 has generally intensified existing inequalities. Exacerbation and deepening of already present patterns of social inequalities are even described as “the clearest impact of the crisis” ([30], p.56). The difference between low- and high-skilled workers has become more pronounced, with highly skilled migrants generally bearing the burdens of new situations more easily. The vulnerabilities of migrant workers—increased risk of unemployment, limited legal protection, and preconditions for marginalisation and further difficult social adaptation—have been identified as a critical problem for the Common Market [31]; regional differences also play a role. Precarious employment of Central and Eastern European migrant workers has been established in several studies, which emphasise the unequal treatment of these workers both in terms of citizenship

rights and public discriminatory practices [32,33]. Instead of highlighting their rights, the risks for potential migrants stand in the focus of information campaigns launched by the EU governments [34].

The impact of the Covid-19 crisis on the migration industry is currently not the subject of such scrutiny. There is the assumption that both governmental responses to the pandemic and workers' capacities to navigate border closures use the available infrastructure of international labour intermediaries [35]. The dynamically changing legal and health regimes in the EU member states caused by the changes in the pandemic situation have significantly increased the recruitment costs of migrants, thus necessitating a more active involvement of labour intermediaries [36] and have even increased the workers' dependencies on intermediaries [37]. Limited control over the work of such agencies under the uncertain Covid conditions is also reported in some cases raising questions about their arbitrary power or irresponsibility [38,39]. However, at the same time, the capacity of these mediators seems restricted to reactions to everyday problems. National case studies illustrate instances of disclosing a preponderance for information services at intermediaries, at the expense of matchmaking and administrative ones, as well as for "flexibility" rather than quality of services [40,41]. Previously existing deficiencies of cooperation between Western and CEE countries on the level of the European Employment Services, EURES, have come to the fore, on their turn, and with greater sharpness [42]; additional in-depth studies have yet to appear. This applies to an even higher degree for countries like Bulgaria, which have a relatively modest record in European labour mediation.

3. Method of research

We have collected and assessed empirical information regarding the attitudes of labour intermediaries in Bulgaria in 2017 (i.e., before the pandemic) in order to grasp the situation in the Bulgarian labour mediation sector in the years since the country's EU integration. As part of the GEMM project ("Growth, Equal Opportunities, Migration and Markets"), funded by the European Commission under Horizon 2020 Programme, we were then able to conduct ten semi-structured in-depth interviews with representatives of private and public agencies working in this field. Five years later, in March 2022, we conducted ten follow-up interviews with other experts from the same sector.

Our initial plan was to contact the same experts whom we interviewed in the first study. However, we were successful in finding and talking to six of them (four from state agencies and two from private agencies). We could not conduct follow-up interviews with four people for different reasons: two of the companies no longer worked in labour mediation abroad, one company had disappeared not only from its address but also from the official register, and one officer from a public agency had left her job. We substituted them with experts from similar organisations, so that our new sample reproduced the main characteristics of the initial one—it was split in half, with five representatives from private agencies and five from public agencies. Among the interviewed experts from private agencies, we tried to present both those who recruited workers for highly skilled jobs (two engaged in the IT sector) and those who recruited low-skilled workers (three employed mainly in the construction and food industry). The five public officers we interviewed, some of which were EURES advisors, were based in different regions of Bulgaria, so they can present us with a more comprehensive picture of the dynamics of labour supply for work abroad. For the last criterion, we sought to understand how diversity was related to the destination countries with which the respective experts worked. Several of the agencies recruited Bulgarian workers for all EU member-states, while others were limited to a few countries (mostly Germany, Ireland, Denmark, Austria, the Netherlands, but also the Czech Republic and Slovakia), and

there were three exclusively oriented towards the German labour market which, in terms of a widely accepted notion, is the most attractive for potential Bulgarian labour migrants.

The interviews lasted between 30 minutes and 1.5 hours and were audio-recorded with the consent of the respondents. Then, the interviews were fully transcribed, with small changes intended to guarantee anonymity, and coded by deriving emerging categories from previously identified common themes [43]. The latter were reflected in the interview guide which covered, in sequential thematic order, the history, size, organisational structure, and main activities of the agency, the practices of recruiting workers abroad, sector and country coverage, the experts' views on the motivation of migrants and employers, attitudes to migration policies, and expectations for the future.

The present article builds upon a comparative analysis of the data from the conducted interviews, with the comparative lenses focused on the experts' views on the situation before and after the pandemic, the recruiting practices of the public and private agencies, the expectations of potential migrants and foreign employers, and the type of contacts they maintained with migrants after arriving in the foreign country. From here, the article is structured in three main sections: changes in mobility practices; intermediaries' perceptions of the expectations and needs of workers and employers; and the challenges facing labour mediation in a new competitive environment. A concluding section works to cover the key aspects of change in the sector caused by the global pandemic and its reflection in the EU and Bulgaria.

4. Changes in mobility practices

All participants in our study are unanimous that the global Covid-19 pandemic has had a very significant impact on the activity of labour intermediaries, and in entirely negative dimensions. The interviews reveal diverse aspects of change that often overlap and influence each other.

Practically all experts note the drastically reduced volume of work caused by the outbreak of the pandemic. Suddenly, there were far fewer people seeking their services for work abroad. The fear of contagion, of course, plays a leading role. However, according to the interviewees' assessments, other factors of a social character intervene. In the uncertain situation caused by the pandemic, people have been worried about leaving their jobs in Bulgaria and looking for something new in another country. Similar considerations are evident in contact with potential migrants, who have begun to estimate the possible risks and benefits of mobility much more carefully. A representative of a private company engaging workers in the IT sector, for example, shares:

Work became a little more difficult, it became uncertain, people began to calculate the situation more deeply, to think about what they will get, but also what might happen to them if they leave their job and start a new one. But candidates are still being found, people come to us. These are mostly young people who are willing to take risks, who do not yet have a real idea in terms of losses, and are more daring.

Requirements to employees formulated by employers also have a deterrent effect. On the one hand, they refer to the protection of health; the experts report job applicants who have given up the search for a job abroad after learning of the requirement for green vaccination certificates. On the other hand, there is also the opinion that, in general, work requirements have become higher, and fewer and fewer candidates from Bulgaria happened to be able to meet them, despite the expressed interest in working abroad.

The problem of high work requirements goes hand in hand with the finding of more complex legislative and administrative procedures for accomplishing mobility compared to pre-Covid times. According to an employee of a private agency specialising in the field of construction, the conditions in some cases have become unbearable and simply hinder mobility:

Our Bulgarian authorities are stopping us, and recently the German authorities have also started stopping us. [...] Changes in the legislation—in the way of insurance. Before we send the workers, we need to get health and social insurance documents. Our people [the workers] have to give us a document that they don't get such insurance here, and it's clear as day, but still they delay issuing these documents for three-four-five weeks. Who will wait for us so long in Germany?

Another problem related to the pandemic turns out to be the uncertainty of the rules in the destination countries, which were constantly changing and complicating the work of labour intermediaries. The employment contracts of the relevant applicants have often started with a long delay due to both the general Covid-uncertainty and the illness and quarantine of the staff of the potential employer company. Such difficulties have experienced by both private intermediaries and public agency representatives. The latter report limited and decreased effective cooperation between EU employment services. In turn, employees in private agencies note the deteriorating economic situation in Europe, which has also increased their costs. “Fuel prices and therefore transport prices, the overnight stays we pay for abroad, the health insurance have gone up in Germany, it's become really difficult,” an intermediary admitted.

It is worth noting that the health situation is perceived by labour intermediaries as not very serious, but rather as an external background to their activity, and not so much as an immediate challenge for job applicants. Only one interview of an employee of a private agency involved in construction mentions a case of a worker who fell ill with Covid-19 in Ireland. However, what follows is the reassuring statement that this person passed his quarantine and went back to work.

The fieldwork for our study was conducted in March 2022, exactly two years after the outbreak of the Covid crisis. Nevertheless, the interviewees saw this two-year period in two parts: an initial shock and major changes, and then a gradual, albeit unsustainable, normalisation. Here are some typical evaluations. A EURES advisor from Northern Bulgaria sums up: “In the beginning, there was a bit of panic, and many people registered, many people were released. Then things took off. They started hiring them again, and things calmed down. In the beginning, it was just such an uncertain situation.” An employee of a company recruiting employees for the IT sector sounded the most optimistic: “It was as if at first, the first year, the companies were startled and paused the recruitment, but then the second year everything came into place and even more positions opened up.” There is, however, evidence of a persistent negative trend from a company recruiting workers for the meat processing industry:

Everything is in the red [...] The number of clients who want to leave Bulgaria has decreased significantly. Employers have also decreased significantly, already at the beginning of Covid they withdrew the ads they had announced. Somewhere 50–60 per cent were withdrawn and new ones hardly come. Those who've remained, we work on their offers.

From the point of view of the last few years, the global pandemic crisis has undoubtedly emerged as the biggest challenge facing the Bulgarian labour mediation sector. Nevertheless, data on other negative factors impacting the activity of labour intermediaries also appear sporadically. One of them is Brexit: the process of UK leaving the EU. Although there is an assessment that the effects of Brexit have not turned out to be as large-scale as expected, such effects are still present. Officers of the public

agency, who in principle have a broader view of mobility processes, refer to the “transport chaos” caused by Brexit and its impact on the jobs of international drivers. A second negative factor is Russia’s invasion of Ukraine from late February 2022. During the fieldwork of our research, only a few weeks had passed since the start of the war, but some of the interviewees were already referring to it. “Military actions restrict mobility,” believes a public officer from North-Eastern Bulgaria. In another case, for an expert from a private agency specialising in the IT sector, the war in Ukraine is not only a background, but also a direct limitation to work:

We had a Russian client, we had been looking for people for him two weeks ago, but now in this situation, there’s just no way for things to happen. Business with the entire company had to be terminated. The people didn’t leave and are here, otherwise I have no idea what would have happened to them.

As can be seen, negative assessments of the development of international labour mediation after the beginning of the Covid-crisis are clearly predominant. This is perceived as a challenge that requires solutions and adaptation of the activity.

5. Needs and expectations of workers and employers

International labour mediators operate as one side of a triangle, the other two sides of which are employers and workers. The supposed task of the mediators is to find the intersection between the interests of the other two parties so that both are satisfied with the mobility achieved.

The representatives of recruitment agencies interviewed by us are practically unanimous in their assessment that the main motivation of job applicants is financial. Over the five-year period since our previous study, this has not changed significantly. A representative of a private company offering low-skilled work in Germany summarises:

People who have financial problems. They go to make money and come back. Those who want to stay go alone and after two or three months they take their families too, right when they save some money to rent accommodation, to find a job for their wife too.

We also clarified that motivation is not even about the supposed better quality of life in the countries of Western Europe. The owner of a private agency recruiting personnel for construction is convinced that “if it was possible to earn that much here, hardly anyone would go to work abroad.” Career development as a motivation was attributed only to individual highly qualified workers, mostly IT specialists and doctors. An employee in the public agency based in Southern Bulgaria also points to the accumulation of work experience as a motivation, but ties it again to the desire for better pay.

Our sample suggests a move toward recruitment of low-skilled workers, with the exception of two firms recruiting IT professionals. This is not just a characteristic of our sample, but a trend in the development of mobility channels that is reported by intermediaries. Employees of the public agency emphasise that in the conditions of the pandemic, potential migrants are more interested in low-skilled positions—mainly in construction and agriculture. A EURES advisor from Northern Bulgaria offers the explanation: “They [the highly qualified] have channels for finding a job, they apply directly, they conduct interviews online. They just don’t need that kind of mediation.”

The organisation of mobility itself also faces financial barriers. For example, an employee of a private company recruiting workers for Germany points out that even the upfront costs are able to turn away many job applicants:

We are inundated with [candidates] asking for jobs. But since many employers want the arrivals to pay their accommodation deposit in advance, they also want to pay their travel expenses, and many people, hearing this, hang up the phone. Otherwise, they have a great desire. Many people ask us, why don't you arrange for the employer to take over and keep the accommodation from the salary, but employers don't get on with it.

The predominant observation is that, in most cases, the applicants are well informed about the working conditions and the requirements in the country they are going to. This is mainly due to the fact that intermediaries are increasingly coming into contact with “regular” candidates (i.e., those who have already done mobility abroad several times and are willing to do it again), usually in the same sector, and sometimes with the same employer. Cyclical and temporary employment is proving to be a leading area of mediation for agencies. “With us, more than 50 per cent go for a certain period and then return. One year at most and they come back,” says the owner of a private agency. Elsewhere the usual period is defined as even shorter: “two or three months and they come back.” “Seasonal work: tourism, gastronomy and construction”, a public employee from North-Eastern Bulgaria shares her observations about the biggest accumulations in employment contracts. In one case, the owner of a private agency even points out that workers in very rare cases stay abroad to look for work on their own because they consider it unprofitable: “they are no longer protected by the terms of our contracts.” Another stated motive for short mobilities is the desire of the workers themselves to return to their families and stay with them for a while before leaving again. The willingness of many employers to keep these workers for longer because they are satisfied with them does not usually seem like a sufficient incentive to extend mobility.

The labour market processes related to the Covid-19 pandemic have led to the emergence of a new practice among intermediaries, mainly those from the public sector: an effort to offer potential migrants a job in Bulgaria before moving to other European countries. “What we do as a priority is rather to point to living and working conditions, to explain the real situation—and first of all to make them look for options on the domestic market,” the public officer from North-Eastern Bulgaria is emphatic. A EURES advisor from Northern Bulgaria has a whole theory on the matter. She believes that in the current crisis conditions, each country is struggling to keep its workforce to itself: “they want to take, but not to give.” According to her, Bulgaria should do the same and attract workers from other countries rather than just encourage her citizens to find work abroad.

The triangle in which labour intermediaries operate is indeed asymmetrical: employers have more weight in terms of requirements compared to workers. The same rule is proven in our research. Recruiters recount a variety of instances in which they have to accommodate the needs and desires of specific workers, but report no efforts to negotiate with employers and renegotiate their terms. An impression is created that the demands of the employers are the imperative that must be fulfilled, and this is the task of the intermediaries themselves: to prepare the workers for its strict implementation. If wishing to exercise their mobility, workers must accept the conditions. In one of the interviews, we come across a significant phrase: “People who come here to look for work abroad are mostly about seasonal work. The expectations are clear there. The conditions are not very good.” It helps that often job applicants are regular applicants, already know these conditions, and do not have higher expectations. The main indicator of a job well done by the agencies seems to be the satisfaction of the employers. Here is a typical opinion: “We, with these countries with whom we're working, work out the contracts so well that later there are no problems, and the employers are very satisfied.” The satisfaction of the workers is also considered, but mainly in a negative sense, in terms of a lack of complaints. An

interesting choice of vocabulary should also be noted. In various interviews with experts operating in very different areas of the labour market, the word “clients” refers to potential employers abroad. Job applicants are simply referred to as “the people”. This in itself seems indicative of the recruitment approach.

Probably, the desire to survive and adapt in a crisis situation dictates the caution of the experts interviewed by us in their assessments of the possible ways of changing the mobility policies. Only a representative of a private company in construction proposes to introduce mechanisms against the double payment of workers’ insurances, in Bulgaria and in the destination country. The other interviews avoid substantial recommendations to national or European institutions.

6. Challenges to labour mediation

The onset of the Covid-19 pandemic has dealt a heavy blow to the functioning of the entire sector of international labour mediation, worldwide, in Europe and in Bulgaria. Even in our preliminary work on selecting the sample for this study, we could see how serious the changes were. Some of the private mediation firms we intended to approach had gone out of business in the past two years, either temporarily or permanently. Even in public intermediary structures, which might be expected to be more resilient, we have seen significant reorganisations and staff changes. Therefore, the adaptation strategies of the recruiters in Bulgaria in the Covid-19 crisis are of interest: what they did to secure their place in the changing market, what difficulties they faced, and how they reacted to the competitive environment.

Expectedly, a priority for private companies in terms of crisis is survival. Preserving the pre-pandemic staff despite the drastically reduced workload is recognised as an important task. A representative of a company specialising in the meat processing industry shares: “The staff here got sick and are now struggling to survive. [We had 10 employees.] We reduced it with just one person. We have been able to retain people, everything has been retained as staff, but otherwise everything is a pain.” Others admit that they have been able to retain their original staff, but at the cost of modifying the target of their operations and moving out of the realm of international labour mediation into providing other services.

A consequence of the conditions during the pandemic is the increasingly widespread shift to online services; this mainly affects public agencies. They report that they have created the necessary organisation for online registration of applicants and electronic correspondence and conducting online interviews with them. However, despite this, most refer to the indispensable role of personal physical contact, especially for applicants. In the words of a EURES advisor from Northern Bulgaria:

But the people themselves could not seem to cope with this situation. They preferred to come to register on the spot and submit their documents on the spot. Otherwise, the attempts were really to have everything done online and remotely. And on the phone. We tried to avoid meetings, but in many cases it became very difficult.

Interviewees generally believe that providing more and more information about labour mobility abroad online, through an official website and social networks, makes work easier; however, this contains risks that job applicants do not read all the requirements carefully thus opening a space for subsequent problems. That is why in-person consultations, both physically and over the phone, are encouraged.

Another innovation that is gaining strength in the pandemic context is labour mediation for remote work, or the so-called home office. A representative of a private company specialising in the IT sector describes this trend and its benefits for workers:

New companies are emerging, searching [for employees], but offering people to work from home. And the people themselves, in this situation, prefer this option, to stay here, instead of getting up with their families and going to another country.

This is the opinion expressed in an interview with another intermediary in the same branch: “Even before Covid, we offered work here as well, but now the pandemic has shown how much better it is for people to work from home, to stay in their own country.”

Of course, the mentioned practice refers to highly skilled forms of work, not to manual labour, where work for a foreign employer inevitably involves physical mobility of the worker to a different country.

Changes in the competitive environment also deserve attention. In our previous research, we found that there is a clear dividing line between public and private agencies operating in the field of labour mediation in Bulgaria. This division arises from their different status and practices; however, in turn, it also produces different discourses regarding the assessment of one’s own roles and advantages. Thus, for example, the discourse of public actors is dominated by the understanding of professionalism associated with a well-established network of experts and specialists offering standard services in a qualitative way to a significant number of potential migrants. As for the private actors, the leading factors include personal engagement and the readiness for assistance in each individual case according to the needs of the individual.

Five years later, the divide has persisted and even deepened. Competition between public and private intermediaries leads to mutual distrust and criticism. The representatives of private agencies we interviewed emphasise the speed of their work, in contrast to cumbersome bureaucratic procedures, and the accuracy of the documentation that they personally check in contact with employers. “We have the advantage of being with people from start to finish, from departure to return. We keep in touch with them all the time,” says a representative of a private company that sends low- and medium-skilled workers to Germany. Various facilitations for job seekers that intermediaries offer to ensure the efficiency of mobility are cited, such as arranging bus transport to the final destination. Attitudes towards public mediators range from ignoring to dissatisfaction. “We have no contact with state agencies at all,” a representative of a private company with a profile in the IT sector emphatically insists. There is almost a hint of pride in that statement. The lack of contacts does not prevent sometimes generalised negative judgments about public labour mediation. This is the example of a representative of a company that recruits personnel for the meat processing industry in Germany and Ireland:

We have hundred per cent advantages over government agencies. Government agencies have very different requirements, their requirements are much more onerous than what we offer. And then, the trust there is not very high, to be honest. No one goes to the government ones; people just look to the private agencies. I don’t know exactly what the reason is, because I don’t contact state agencies, and I haven’t had clients who went with a state agency and then came to us. I think things are difficult there, I don’t know if people depart there [with the support of the public agency] at all.

It turns out, the mistrust is mutual. Public agencies often justify their advantages as mediators with the significantly greater resources at their disposal. Their representatives in our sample claim that they provide security for job applicants. First, they guarantee the reliability of the employers who have been verified. Bad practices are easily neutralised, and the network of contacts is much larger than that of any private intermediary. Second, public officers emphasise the higher legal and administrative

competence with which they guide their clients. This refers to “support in terms of settling in the host country (e.g., finding housing, lifestyle, the work of the institutions there),” but also “assistance in various cases related to mobility, not only the labour one: recognition of diplomas, working conditions and insurance in other countries, exercise of rights in the coordination of social security in Europe.” Private intermediaries are rarely mentioned in these interviews. The consciousness of one’s own superiority is indirectly expressed, by using degrees of comparison (“better”, “more”), without specifying what the comparison is against. In just one case, a EURES advisor from Northern Bulgaria notes that today’s job-finding channels are “mostly through private agencies,” and hastens to add: “which is not a bad thing.” The assumption seems to be that such practices should generally be viewed more negatively than she does.

Transformations in migration industry are such that competition is no longer limited to public and private employment agencies. From the interviews we can extract practices that we have not come across before. An employee of the state agency comments on employers from Denmark and the Netherlands, who “do not go through the labour offices, they have separate recruitment agencies, with language courses.” Thus, both public and private intermediaries are bypassed. This is rather cautiously described by the interviewee as “rather unorthodox methods.” Additionally, there is a visible tendency of workers themselves turning into labour intermediaries. It arises in situations of cyclical temporary employment, when the same workers have carried out labour mobility several times for different periods of time with the same employers in other EU countries. “Employers now directly come into contact with their former workers, using them also as a channel for recommendation and recruitment of new workers,” we learn from another interview with a public officer.

The notion of a more complex, more competitive and more unpredictable labour mediation environment is emerging from various places.

7. Conclusions

Covid-19 threw into crisis the labour markets of EU countries, including Bulgaria’s labour market. Before the outbreak of the pandemic, the labour mediation sector was in the process of developing into a fully-fledged migration industry, and its agents were rather optimistic about their prospects [44]. In 2022, the agencies and experts involved in their work painfully realised that undoubtedly the sector had also entered into a crisis and was in need of re-assessing its policies and practices [36]. Our research managed to bring together diverse perspectives on the nature of this crisis and its impacts, with a focus on the perceptions of labour recruiters.

Above all, the crisis implied structural adaptation, in many cases drastic, to new working conditions. The experts we interviewed reported the need to restructure the entire organisation of their activities—in terms of mechanisms, partners, and contracts. The global pandemic has caused a double withdrawal: of employers who have taken away their job offers in large numbers, and of workers who have begun to design their migration plans much more cautiously. Within this adaptation related to the search for new partners, new market niches, and new forms of interactions, the labour intermediaries in our sample seemed to have placed the lion’s share of their efforts on maintaining their institutional capacity. This meant preserving their staff, competencies, and contacts as much as possible, a tendency actually in harmony with the basic advantage of formal (both private and public) labour intermediaries over informal network actors. Such a finding has been previously outlined in the literature but has been new for the Bulgarian context of emigration: labour market intermediaries acted as agents of

knowledge about the diverse European labour markets. It was knowledge which appeared indispensable to other participants in the labour supply-and-demand process [32,38,42].

Non-pharmaceutical interventions undertaken by the various EU countries relied on compliance for cooperation inside labour markets. The results of our research addressed an understudied issue: the priorities of financial and administrative risk perception over health. In the eyes of labour intermediaries, Covid was proving to not significantly be a challenge for migrants' health as it was for migrants' employment, pay, and job security. The observation in the literature that the unequal effect of the restrictions on different socio-economic groups required a differentiated approach to the more vulnerable groups [29] should take into account in no small measure the belonging of a large part of mobile workers to such groups, especially the low skilled and those originating from the South-East and Central Europe.

The crisis of the labour intermediary sector marked by Covid-19 has blocked many activities of recruiting agencies and delayed others. At the same time, based on the analysis of the collected information, it can be concluded that the Bulgarian migration industry has continued to develop and strengthen itself, along the lines of perhaps the most important aspect of development, the creation and recognition of a tradition. Experts from public and private agencies often talked about "traditional clients", about "traditional trust", about working on recommendations from "satisfied partners", about steadily decreasing complaints, about increasingly precise and efficient documentation. From the point of view of the recruiters, as clarified from the interviews conducted, their problems mainly stemmed from the context in which they were placed, not from their own actions and decisions: the difficulties were perceived as structure-based rather than agency-based deficiencies

Our article attempts to fill in a significant gap in the literature by highlighting new practices and new challenges for the migration industries which might be valid in other CEE countries after the pandemic. Both labour intermediaries and potential migrants found out that working abroad could actually mean working from home in your home country for an employer abroad. Labour mobility was no longer considered exclusively as trans-border physical mobility. Our findings uncovered a growing expectation for a shift towards a digitalisation of mobile work. This trend could not only reduce the high recruitment costs which prevented the expansion of mobility under Covid-19 but also opens new avenues as well as poses new challenges to the practices and policies in the sector [36,45].

Our study has signalled another new trend facing the country's international labour mediators. It is important to note the opinion of one of the experts that Bulgaria might soon turn into a migrant-receiving country, requiring the services of the same labour intermediaries. The wave of Ukrainian refugees since the outbreak of Russia's war in 2022 has revealed the urgent need for a substantial reorientation of both the practices and policies of the recruiting agencies, and this trend could possibly have long-term prospects.

Another interesting finding to which we came in the analysis was the growing importance of and the increasing opportunities for cyclical mobility of Bulgarian citizens in the European labour markets. Job applicants have been leaving their country of origin and have been returning to it many times. It was interesting to observe the reported high levels of information about the labour markets home and abroad gathered by the applicants. Probably, this was not only due to the fact that many of them have already worked abroad and have had a notion of what it was like, but also to the increasingly numerous Bulgarian diasporas in various European countries, which assisted their friends and relatives with information and contacts. Matchmaking services appeared to be more relevant than information ones [40]. Along with that, the role of the migrant workers themselves in the labour mobility process was objectively increasing.

It turned out that they themselves might become labour brokers due to their contacts with previous employers. They were no longer just seeking jobs, but also finding other job seekers. In itself, this is a new and previously unknown phenomenon of competition in the labour mediation field which private and public agencies are likely to face in near future.

The comparative analysis of the interviews showed that the Bulgarian migration industry still had survival in crisis conditions as its priority. This led experts in the sector to focus more on their difficulties, and potential solutions to these difficulties, than on the general problems of labour markets and mediation. In terms of functional adaptation of the sector, this meant a quite strict adherence to the requirements and interests of employers. The triangle potential workers—intermediaries—potential employers continued to be highly asymmetric. Vulnerability of workers, let alone their rights, did not seem to be addressed in detail [6].

Finally, we need to acknowledge the limitations of our study. The most obvious one was the small number of our interviewees which limited the generalisability of the findings. The failure to do all the follow-up interviews with the same recruiters from the first study reduced the longitudinal element of the research and the value of the comparisons. However, this could be interpreted as another research finding as it reflected the high instability of the sector in Bulgaria and of private intermediary agencies in particular. Many companies have had to leave the migration industry and turn to other market niches. The small number of interviewees did not allow to expose the specificity of recruiting agencies in different economic sectors and employee skill levels. In addition, although our sample included agencies from five (out of six) planning regions in Bulgaria, still the results were valid for the context of a single country. Future research examining the development of migration industries in several CEE countries might bring new insights into a wider range of policies and practices as well as allow a deeper understanding of the emerging trends highlighted in this study.

Use of AI tools declaration

The authors declare they have not used Artificial Intelligence (AI) tools in the creation of this article.

Conflict of interest

All authors declare no conflicts of interest in this paper.

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