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EMERGING DIVERSIFICATIONS OF LABOR MIGRATION TO SLOVENIA: FROM THE WESTERN BALKANS TO ASIA

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ABSTRACT

Emerging Diversifications of Labor Migration to Slovenia: From the Western Balkans to Asia

Labor migration has long shaped Slovenia's labor market, through historically established arrivals from the former Yugoslav region, often referred to as part of the Western Balkans. Persisting labor market shortages—driven by demographic decline, low unemployment, and sectoral imbalances—have recently intensified competition for workers across the EU. As inflows from EU states remain limited, Slovenia has diversified its recruitment, with rising migration from Asia. It has signed a Memorandum of Understanding with the Philippines on cooperation in labor relations and employment. The article examines policy developments and labor-market data on foreign workers from 2010 to 2024, evaluating the interplay between labor shortages, employer demand, and the governance of labor migration.

KEYWORDS: labor market shortages, labor migration, Slovenia, Western Balkans, Asia

IZVLEČEK

Nove oblike delovnih migracij v Slovenijo: od Zahodnega Balkana do Azije

Delovne migracije že dolgo zaznamujejo slovenski trg dela, predvsem z zgodovinskimi priseljevanji iz nekdanjih jugoslovanskih republik, ki so danes del t. i. Zahodnega Balkana. Vztrajno pomanjkanje delovne sile, ki izhaja iz demografskega upada, nizke brezposelnosti in sektorskih neravnovesij, je v zadnjem času zaostriло konkurenco za delavce po vsej Evropski uniji. Ker so priselitveni tokovi iz držav članic EU omejeni, je Slovenija razširila svoje zaposlovalne kanale, kar se odraža v naraščajočih migracijah iz Azije ter v podpisu memoranduma o soglasju s Filipini o sodelovanju na področju delovnih razmerij in zaposlovanja. Avtorici na podlagi podatkov za obdobje 2010–2024 obravnavata trende (upravljanja) delovnih migracij in podatke o priseljevanju in trgu dela ter analizirata medsebojno odvisnost med strukturnimi primanjkljaji delovne sile, povpraševanjem delodajalcev in oblikovanjem migracijskih politik.

KLJUČNE BESEDE: primanjkljaji na trgu dela, delovne migracije, Slovenija, Zahodni Balkan, Azija

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INTRODUCTION

Labor migration to Slovenia has been a persistent phenomenon since the end of World War II, when Slovenia emerged as an important destination for workers from other Yugoslav republics—namely Croatia, Bosnia and Herzegovina, Serbia, Montenegro, and Macedonia through internal migration within the Yugoslav federation. Immigration from these republics gradually increased over the years, from initial dispersed settlement to chain migration that led to the formation of strong, extensive migration networks (Josipovič, 2006). After Slovenian independence and the collapse of Yugoslavia in 1991, labor immigration from this geographical area, which has since been labeled as the Western Balkans, gained an international character, continued to persist, and has been on the increase ever since. Slovenia has continued to rely on workers from the Western Balkans to fill labor-market vacancies across a variety of sectors. Moreover, due to the economic booms from 2004 to 2008 and after 2017, Slovenian employers began actively recruiting workers from these countries (Bučar Ručman, 2025), and Slovenian immigration policy followed suit by signing bilateral agreements with Bosnia and Herzegovina and Serbia to facilitate immigration. Labor demand also remained high due to Slovenian involvement in the posting of workers to other Member States, where Slovenian businesses created extensive business opportunities within the framework of the provision of services—especially in the construction sector (Vah Jevšnik et al., 2022).

In recent years, however, labor shortages in Slovenia have reached unprecedented levels. In 2024, the unemployment rate fell to just 3–4 percent, while approximately 46.5 percent of employers reported experiencing a shortage of suitably qualified candidates (Banka Slovenije, 2025). The unfavorable demographic conditions, high retirement rates, and unpopularity of certain professions have all contributed to the shortages and increased the need to recruit workers from abroad. However, as many EU Member States face comparable labor market shortages, they too have begun actively recruiting workers from the Western Balkan countries, offering various incentives, higher wages, and better working conditions, thereby engaging in open competition for labor. Since immigration to Slovenia from other EU countries remains low, employers have begun turning toward other possible third countries to recruit workers. Since 2022, labor migration from India, Nepal, China, Bangladesh, and the Philippines has increased significantly.

The unprecedented geographical diversification in the recruitment of third-country nationals has also received governmental support. In 2025, Slovenia reinforced this shift through new bilateral cooperation with the Philippines, including a Memorandum of Understanding on labor mobility and the opening of the Slovenian Embassy in Manila (Gov.si, 2025).

The article examines these shifts in recruitment trends by analyzing statistical data and relevant national policy developments, focusing on the period from 2010 to 2024. The statistical data employed include information on shortage and deficit

occupations in the Slovenian labor market, the number and share of employed third-country nationals by nationality, their sectoral distribution, and the posting of third-country nationals from Slovenia to other EU Member States within the framework of the provision of services. The review of policy documents covers the two bilateral agreements that Slovenia has concluded with Bosnia and Herzegovina and with Serbia, as well as the Memorandum of Understanding currently in place with the Philippines. The findings are analyzed primarily using the theoretical and conceptual framework developed by Anderson & Ruhs (2010) to evaluate employer demand for migrant labor and examine the relationship between labor shortages, immigration, and public policy.

LABOR SHORTAGES AND THE IMMIGRATION OF FOREIGN WORKERS

Employer demand for migrant workers has become a defining feature of labor markets in high-income countries, where employers increasingly call for additional migrant labor, arguing that domestic labor supplies are insufficient to meet their needs. The notion of shortage that generally informs employers' requests for migrant workers is that labor demand surpasses the available supply at the existing wage levels and employment conditions (Anderson & Ruhs, 2010). However, short-term imbalances between labor supply and demand—arising from sudden increases in demand for specific occupations driven by economic dynamics, persistently low wages and poor working conditions in certain sectors, or declining interest in accepting particular jobs—can become even more acute and complex under growing demographic pressures. Consequently, incorporating demographic trajectories into any analysis of labor shortages is essential.

Defining *specific* reasons for labor shortages is fundamental to the analysis of shortages, immigration and public policy, which needs to address four key issues: the characteristics, dimensions, and determinants of employer demand for labor; characteristics of and segmentations in labor supply; employers' recruitment practices and use of migrant labor; and immigration and alternative responses to perceived staff shortages (Anderson & Ruhs, 2010). Such analysis must, by definition, be sector-specific, as each sector operates according to its own internal dynamics and particularities. The scope of this article is more modest and does not undertake a more detailed sectoral analysis. Nevertheless, the framework remains highly valuable for identifying broader labor-market patterns in Slovenia, which constitute the core of our inquiry. Another theoretical approach useful for analyzing the dynamics of labor migration of TCNs to Slovenia is the dual labor market theory (Piore, 1979). According to this theory, migration is primarily driven by structural labor demand in advanced industrial economies. Piore argues that labor markets in developed countries are divided into two segments: a primary sector characterized by stable employment, higher wages, and opportunities for advancement, and a secondary

sector marked by low wages, insecurity, and poor working conditions. Native workers tend to avoid employment in the secondary sector, creating a persistent demand for migrant labor to fill these positions. In this perspective, international migration is therefore understood as a structural feature of modern economies rather than solely an individual economic choice. However, a complementary theoretical approach is also required to understand that migration decisions are often made collectively by households or families as a strategy to manage economic risks, diversify income sources, and overcome market failures in countries of origin (Stark & Bloom, 1985). From this perspective, international migration is understood not only as a response to labor demand in destination countries, but also as a household-level strategy shaped by broader socio-economic conditions. Together, these theoretical approaches contribute to a more comprehensive understanding of the dynamics of labor immigration to Slovenia, particularly amid persistent labor shortages and the growing demand for foreign workers in specific sectors.

Shortages on the Slovenian labor market are among the most acute in the European Union, as more than 40 percent of firms continue to report labor shortages as a factor limiting production (OECD, 2024), and shortages are reported in 105 occupations from a total of 436 in the ISCO nomenclature (EURES, 2024). Shortages are particularly pronounced in construction, manufacturing, health and social care, hospitality and related services, and education. Although they vary by sector, skill requirements, and geographic region, they are, in aggregate, substantial and structural rather than merely cyclical. This can, to a significant extent, be attributed to population aging and low birth rates. Political messages about the vanishing of values, way of life, and even the culture of less reproductive “domestic” populations due to “reproductively more vital foreigners or foreign-born populations” entrap labor migrants as well (Knežević Hočevar & Cukut Krilić, 2019).¹ In media and policy discourses, migrant workers are constructed not only as “culturally” and linguistically different but also as competitors in the labor market, a perception that can fuel resentment among local populations (Szelewa & Polakowski, 2022).

According to Knežević Hočevar (2011), there exist two sets of measures to improve the balance between the economically active and inactive populations. The first set of measures concerns increasing the fertility of “local populations,” and the second set pertains to immigration, which is not the preferred solution of nation-states. However, according to the latest Eurostat demographic projections from 2023, the population of Slovenia is expected to increase only until 2026, followed

1 For Slovenia, Knežević Hočevar (2011) examined how migration was represented in debates on declining fertility and demographic change in the Slovenian press from 1970 to 2009. The author argues that primordialist and essentialist understandings of collective membership in the national community prevailed in the media. A more detailed analysis from 2004 to 2009 showed that discussion of the replacement of the nation prevailed over emphasis on the replacement of Slovenia’s population. More inclusive concepts of the nation were in the minority. There has been no further research on the connection between migration and demographic trends in Slovenia.

by a decrease over the next 20 years, under the baseline demographic scenario. Changes in several key assumptions of this scenario show that an increase in net migration and lower mortality have the strongest effect on increasing the number of inhabitants compared with the baseline scenario. In 2100, Slovenia would have 331,000 more residents under the higher-migration scenario than under the baseline scenario, and 32,000 more under the lower-mortality scenario. Under a lower-fertility or lower-migration scenario, Slovenia would have about 300,000 fewer inhabitants by 2100, while under a scenario with no net migration, the country would have more than half a million fewer people than in the main projection (Institute of Macroeconomic Analysis and Development, 2025). These predictions point to the increasing importance of international migration in relieving labor market shortages.

Shortages of workers in Slovenia have historically been addressed by recruiting workers from abroad, especially from the countries of former Yugoslavia, due to their perceived historical, cultural, and linguistic proximity. As Anderson (2010) notes, presenting immigration as a positive solution for migrants, employers, and the national economy is harder to sustain during economic downturns than during periods of economic growth. This can also be observed in Slovenia's migration and labor market policies. Previously, one of the key state mechanisms for regulating labor migration to Slovenia, particularly in response to the economic crisis, has been the annual quota of work permits (Medved, 2010), which has not been set since 2010. Another example of protectionist policies in the area of labor migration was the Decree on Restrictions and Prohibition of Employment and Work of Aliens, approved in June 2009 which was in force until the end of 2010, which, for instance, prohibited seasonal work in tourism and construction, severely limited the employment of workers from Kosovo due to perceived abuses of work permits and introduced regional distributions of quotas that stipulated that 95 percent of unused quotas should be distributed among the nationals of Yugoslavia's successor states except Kosovo and the remaining 5 percent among other third-country nationals and Kosovo citizens. The Decree also prohibited the issuance of new permits to representatives of micro and small companies and to representatives of branch offices (Pajnik et al., 2009; Pajnik & Bajt, 2010). Currently, there exist two limitations to the employment of foreign workers in Slovene legislation. First, under the Law on Employment, Self-Employment and Work of Foreigners, employers may be banned from employing foreigners if they have committed labor legislation violations. These employers are banned from employing foreign nationals for one, two, or three years, depending on the legal nature of the violation (Employment Service of the Republic of Slovenia, 2025a). Second, the Employment Service of the Republic of Slovenia is required to conduct a labor-market test to determine whether suitable workers are available in Slovenia. However, for certain professions, such as those in construction, hospitality, retail, transport, health care, pharmacy, and IT, this requirement may be waived, and up to one hundred foreign workers can be employed in these professions without such a test (Employment Service of the Republic of Slovenia, 2025a).

In 2024, the Government of Slovenia adopted the Strategy in the Field of Immigration. The second strategic objective focuses on promoting legal immigration for employment and other forms of work. This objective includes several sub-objectives related to the conclusion of employment agreements, the improvement of the legislative framework, and the monitoring of regulatory implementation in practice. It also addresses removing administrative barriers and simplifying administrative procedures for foreign nationals. A significant part is dedicated to ensuring adequate protection of migrant workers' rights (Ministrstvo za notranje zadeve, 2024). In November 2024, foreign citizens accounted for 15.9 percent of persons in employment excluding farmers; by June 2025, their share had increased to 16.1 percent, while the number of foreign citizens in employment reached its highest level to date (Zidar, 2025a; 2025b). Since 2010, the number of foreigners employed in Slovenia has increased by 156 percent, from 56,650 in 2010 to 144,835 in 2024 (Figure 1). Every sixth economically active person was a foreign national, and more than half were employed or self-employed in construction and manufacturing. Among men, the highest number worked as heavy truck and lorry drivers, and among women, most were employed as cleaners, helpers, and housekeepers in offices, hotels, and other establishments² (Zidar, 2024).

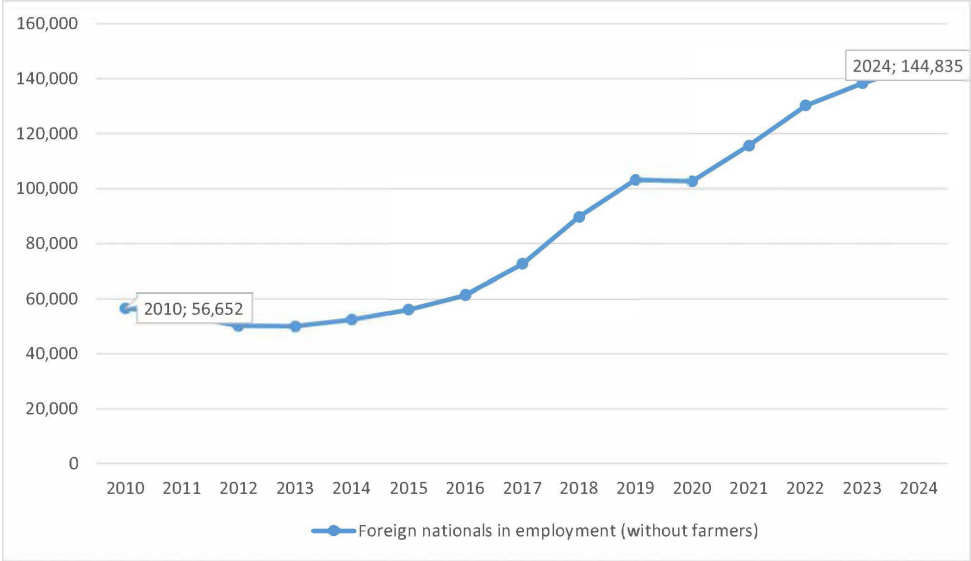


Figure 1: Evolution of the number of foreigners employed in Slovenia, 2010–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

In 2024, the number of employed foreigners was 144,835, out of which 18,442 (13 percent) were EU nationals and 87 percent were third-country nationals (TCNs).

² Data for May 2024.

Almost half of all foreigners employed in Slovenia were nationals of Bosnia and Herzegovina. If only TCNs are considered, the share of Bosnia and Herzegovina nationals was 56 percent, followed by the nationals of Serbia, Kosovo, and North Macedonia. Labor migrants from these four countries accounted for nearly 90 percent of all TCNs in employment in Slovenia.

According to a 2024 study involving 114 Slovenian companies, the principal reasons for employing foreign workers are the shortage of domestic labor and the need to secure employees with the requisite competencies. Additional motivations include ensuring workforce stability amid fluctuations in demand, enhancing diversity to support company growth, and recruiting workers who are more flexible in adapting to variable working hours (e.g., shift or night work). Notably, surveyed employers do not identify cost reduction as a benefit of hiring third-country nationals (Domadenik Muren et al., 2024).

In the public sector—particularly in health care—persistent staff shortages are still being addressed through the recruitment of migrant workers, despite the implementation of various incentives to encourage native students to enter less popular specializations or to take on nursing. Health-care professionals in the Western Balkans, however, are also being targeted by higher-income EU countries, further complicating Slovenian health-care providers' efforts to recruit them. Consequently, individual health-care providers in several Slovenian regions have intensified their recruitment efforts in these countries, either by engaging recruitment agencies or by traveling there themselves to offer employment opportunities (Šestan, 2022). In this case, too, the concern is to secure safe staffing levels rather than reduce staff costs.

LONG-STANDING TREND OF RECRUITMENT FROM THE FORMER YUGOSLAV REGION SUPPLEMENTED BY AN EMERGING INTEREST IN ASIAN COUNTRIES

The increase in the number of employed third-country nationals in Slovenia has been most pronounced among nationals of Bosnia and Herzegovina, whose number has risen by 156 percent since 2010 (Figure 2).

The inflow of workers from Bosnia and Herzegovina has been long-standing and has given rise to extensive migrant networks that at times generate a self-sustaining supply of labor in some sectors (Rodriguez, 2004), which employers can draw upon to manage and regulate labor flows. A combination of push and pull factors shape migration trends between Slovenia and Bosnia and Herzegovina. The labor market in Bosnia and Herzegovina has been affected by political and economic instability, the collapse of key industries, and mismatches between skills and demand. It is also characterized by low wages and a large informal sector, which contribute to workers' vulnerability, including income irregularity and a lack of social security. This has resulted in a significant outflow of workers and consequent persistent labor

shortages. Discouraging economic and political conditions in Bosnia and Herzegovina are contrasted by high labor demand in Slovenia. Slovenia is an appealing option for Bosnian workers due to significantly higher wages, better labor market prospects, familiarity with the language, historical ties, geographical proximity, and, importantly, facilitated immigration procedures (Danaj et al., 2023).

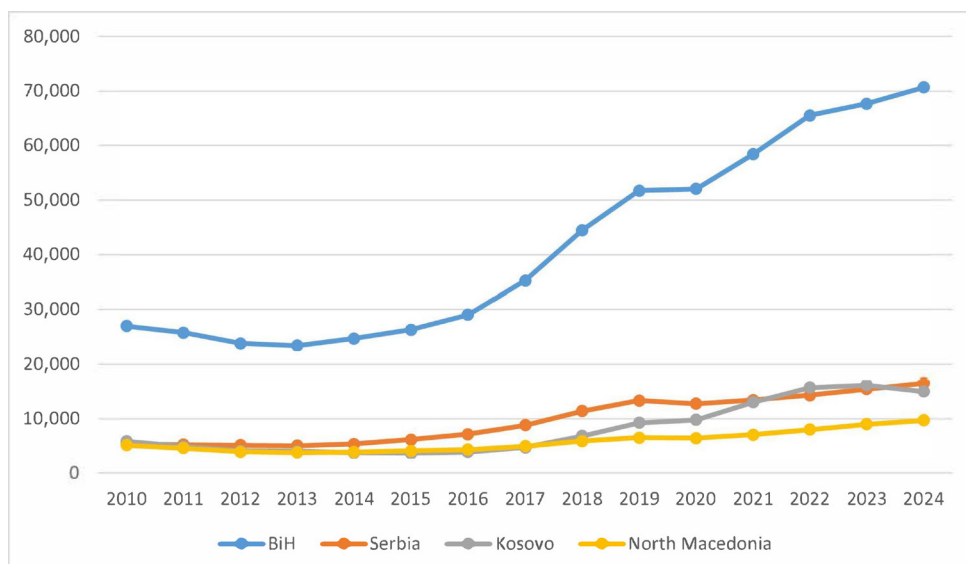


Figure 2: Evolution of the number of employed nationals of Bosnia and Herzegovina, Serbia, Kosovo, and North Macedonia in Slovenia, 2010–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

Recruitment and immigration procedures have been facilitated through bilateral agreements. The two countries signed the Agreement on the Employment of Citizens of Bosnia and Herzegovina in Slovenia in 2012 (in force since 2013). According to the Agreement, Slovenian employers must first post vacancies via the Employment Service of Slovenia. If no suitable candidate is found, the vacancy is forwarded to Bosnia's Employment Service to initiate recruitment. Workers must remain employed by the designated employer for at least one year. If they leave earlier, their work permit may be revoked, except in cases where employment is terminated for reasons beyond their control. After one year, they gain free access to the labor market in Slovenia. Work permits are issued for three years and are renewable for another three years under qualifying conditions.³ Another bilateral agreement in place is the Agreement on the Employment of Citizens of Serbia in

3 The full text of the Agreement between the Government of the Republic of Slovenia and the Council of Ministers of Bosnia and Herzegovina on the Employment of Citizens of Bosnia and Herzegovina in the Republic of Slovenia: https://www.uradni-list.si/_pdf/2012/Mp/m2012092.pdf (pp. 359–369).

Slovenia, adopted in 2018.⁴ Both labor agreements follow a shared design: coordinated recruitment through employment services, multi-year permits, one-year tethering, and post-one-year labor-market freedom. Both also include streamlined permit processes (Danaj et al., 2023).

Amid fears that the “Western Balkans pool” is being drained by other EU countries with more competitive labor-market conditions than Slovenia, the country began turning toward Asian countries as part of a new recruitment strategy. In March 2025, the Slovenia–Philippines bilateral Memorandum of Understanding (MoU)⁵ on labor mobility was signed. The core aim of the MoU is to facilitate the safe, ethical, and transparent deployment of Filipino workers to Slovenia under a government-to-government agreement, starting primarily with care workers who are in high demand in Slovenia. The signing took place in Manila, concurrently with the opening of Slovenia’s first and only embassy in Southeast Asia, marking an important turn in Slovenian bilateral relations (Gov.si, 2025). In October 2025, the two countries further deepened labor cooperation by signing a Joint Declaration of Intent, reaffirming their shared commitment to promote safe, orderly, and ethical labor migration while upholding the rights and welfare of Filipino workers in Slovenia (The Filipino Times, 2025).

Labor migration from Asian countries is not a recent phenomenon. However, its scale has expanded markedly in recent years, especially since 2022. Although the absolute numbers of Asian workers remain lower than those of Bosnian nationals, the growth rate is considerably higher. Within a single year, from 2023 to 2024, the number of employed Nepalese nationals increased by 220 percent, Filipino nationals by 170 percent, Bangladeshi nationals by 126 percent, Indian nationals by 92 percent, and Chinese nationals by 17 percent. By contrast, the number of employed Bosnian nationals rose by only 4.4 percent over the same period. When examined over a longer timeframe, from 2015 to 2024, the growth is even more pronounced (Figure 3).

4 The full text of the Agreement between the Government of the Republic of Slovenia and the Government of the Republic of Serbia on the Employment of Citizens of the Republic of Serbia in the Republic of Slovenia: <https://www.uradni-list.si/glasilo-uradni-list-rs/vsebina/2019-02-0033?utm>.

5 The full text of the MoU between the Republic of Slovenia and the Philippines on cooperation in the field of employment: <https://www.uradni-list.si/glasilo-uradni-list-rs/vsebina/2025-02-0019/uredba-o-ratifikaciji-memoranduma-o-%20soglasju-med-vlado-republike%20slovenije-in-vlado-republike-filipini-o-sodelovanju-na-podrocju-dela>.

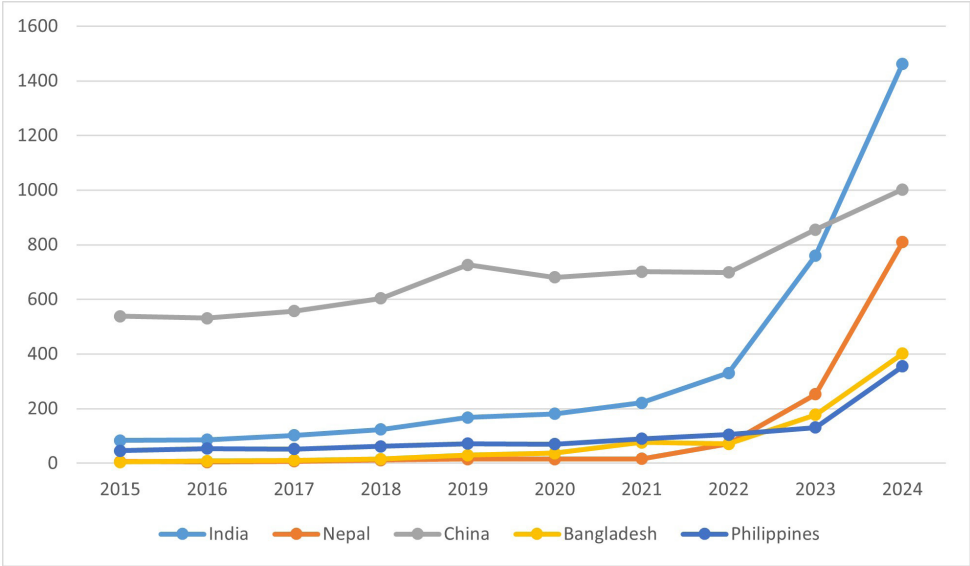


Figure 3: Evolution of the number of employed nationals of India, Nepal, China, Bangladesh, and the Philippines in Slovenia, 2015–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

Sector	2010	2024
Manufacturing/processing activities	9,658	39,683
Construction	25,918	37,811
Transport and storage	5,512	19,344
Trade, maintenance, and repair of motor vehicles	3,006	10,450
Tourism and hospitality	3,165	9,138
Professional, scientific, and technical activities	1,874	4,936
Information and communication activities	431	2,095

Table 1: Employed foreign nationals by sector, Slovenia, 2010 and 2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025).

Traditionally, construction has been the sector with the highest number of foreign workers, as shown in Table 1, which presents the number of employed foreign nationals by sector for 2010 and 2024. In 2010, construction had the highest number of foreign workers, namely 25,918, followed by manufacturing and processing activities (9,658) and transport and storage (5,512). In 2024, the highest number of foreign workers was already employed in the manufacturing and processing activities

(39,683), followed by construction (37,811) and transport and storage (19,344). However, the relative increase in the number of foreign workers has been greatest in manufacturing and processing activities, transport and storage, the trade, maintenance and repair of motor vehicles, tourism and hospitality, and information and communication activities, where these increases have been three- to four-fold. Another important change that concerns specific labor market sectors is the introduction, in 2025, of the possibility of seasonal work (up to 90 days) in hospitality and tourism, in addition to the previously available seasonal work in agriculture (Employment Service of the Republic of Slovenia, 2025b).

Breakdown by nationality for 2024, based on unpublished data provided by the Statistical Office of Slovenia in 2025, shows that the nationals of Bosnia and Herzegovina were mostly employed in the manufacturing sector (22,831), followed by construction (18,738). Serbian nationals were mostly employed in the transport and storage sector (5,343), Kosovar and North Macedonian nationals in the construction sector (10,166 and 2,810, respectively), and Montenegrin nationals in the manufacturing sector (162). The manufacturing sector also employed most Asian workers, specifically, Indian (358), Bangladeshi (162), Filipino (130), and Nepalese (272). The exception is Chinese nationals, who were mostly employed in the hospitality sector (572).

The analysis of labor permits issued to nationals of Bosnia and Herzegovina and Serbia under bilateral agreements in 2024, based on unpublished data provided by the Employment Service of the Republic of Slovenia in 2025, indicates that 40% (7,320) of permit holders had primary or incomplete primary education, while 57% (10,267) had vocational, technical, or general secondary education. In comparison, third-country nationals who were issued single permits for employment in Slovenia generally had lower educational attainment: 76% (19,881) had primary or incomplete primary education, whereas only 15% (3,914) had qualifications equivalent to secondary education. This indicates a sustained demand for low-skilled labor in the Slovenian economy, which also extends to the provision of such workers as posted employees to other European Union Member States to deliver services.

POSTING OF THIRD-COUNTRY NATIONALS BY SLOVENIAN EMPLOYERS TO OTHER EU MEMBER STATES

Posting of workers is a cross-border form of service provision through which workers employed in one European Union (EU) Member State are temporarily sent to work in another Member State, often in response to labor supply-demand imbalances. Posting of workers is regulated by Directive 96/71/EC, commonly known as the Posting of Workers Directive, as amended by Directive (EU) 2018/957. Relevant national laws and regulations concerning the posting of workers apply in addition to the Directive. Which national social security system applies to the posted worker and where

social security contributions need to be paid, is regulated by the Regulation (EC) No 883/2004 (referred to as the Basic Regulation) on the coordination of social security systems and its implementing Regulation (EC) No 987/2009. The provision of services through posting has become one of the most important forms of cross-border labor mobility. In 2023, the total number of postings in the EU and EFTA rose to 5.5 million (+19.5 percent relative to 2022), distributed among an estimated 3.5 million individual persons (+13 percent compared to 2022) (Gasperini et al., 2025).

Slovenia has been one of the main sending Member States of posted workers in the EU. The number of issued PDs A1⁶ and the share of persons in total national employment posted from Slovenia have been on a continuous increase, reaching a peak in 2023, when a total of 176,363 PDs A1 were issued, and 65,590 persons (7 percent of all persons in employment) were posted abroad. In 2024, a decrease in the numbers was recorded after several years of rising, but posting remains an important business endeavor for Slovenian employers (Vah Jevšnik & Toplak, 2025).

Over the years, the posting of workers from Slovenia has been driven by a substantial increase in the number of posted TCNs from the former Yugoslav region, especially nationals of Bosnia and Herzegovina, Serbia, Kosovo, and North Macedonia. Together, these nationalities have consistently accounted for more than 96 percent of all posted TCNs; in 2024, their share was 96.6 percent (Figure 4).

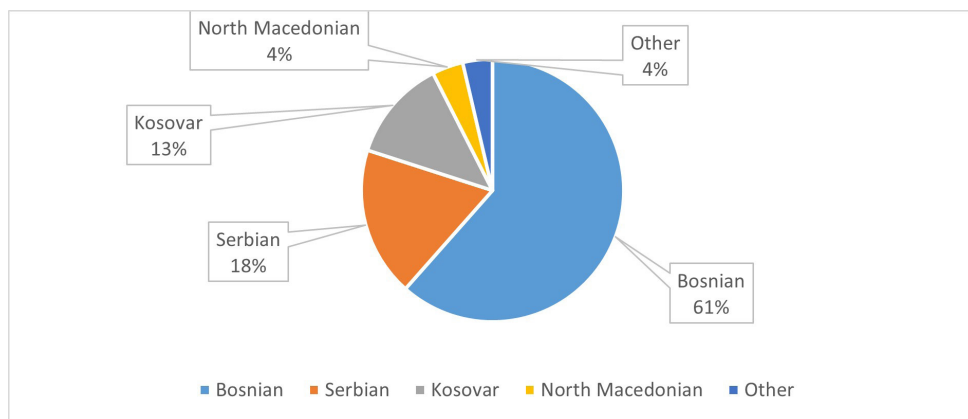


Figure 4: Share of outgoing posted TCNs from Slovenia, by nationality, 2024 (source: own calculations based on unpublished data provided by the Health Insurance Institute of Slovenia, 2025).

In the same year, the nationals of BiH accounted for over 60 percent of all posted TCNs and 39 percent of all persons posted from Slovenia. More than 18 percent of all posted TCNs were Serbian nationals (nearly 12 percent of all persons posted), and

⁶ Posted workers are issued an administrative document A1 (PD A1) that shows they are covered by the social security system of the Member State from which the posting takes place.

13 percent were Kosovars (8 percent of all persons posted) (Table 2). The share of posted Slovenian nationals was 30 percent. This means that fewer Slovenian nationals than Bosnian nationals were posted abroad.

Country	Number	Share in all TCNs (%)	Share in all posted persons (%)
Bosnia and Herzegovina	23,256	61.5%	39.0%
Serbia	6,959	18.4%	11.7%
Kosovo	4,745	12.6%	8.0%
North Macedonia	1,449	3.8%	2.4%
India	385	1.0%	0.6%
Albania	160	0.4%	0.3%
Ukraine	154	0.4%	0.3%
Belarus	132	0.3%	0.2%
Montenegro	126	0.3%	0.2%
Bangladesh	110	0.3%	0.2%
Other third country	313	0.8%	0.5%
Total	37,789	100.0%	63.0%

Table 2: Number of outgoing posted TCNs from Slovenia, by country of nationality, top 10, 2024 (source: own calculations based on unpublished data provided by the Health Insurance Institute of Slovenia, 2025).

The trend of labor migration to Slovenia from the Western Balkans is therefore reflected in the trend of posting of third-country nationals to provide services in the EU. Labor migration from Asian countries is also observed in data on the posting of workers, albeit the absolute numbers remain low. In 2018, Slovenian employers did not post any citizens from the Philippines or India, and only 5 from Bangladesh. In 2024, however, the number of Filipino citizens posted was 13, Bangladeshi 110, and Indian 385. The increase in 2024 compared to 2023 was notable, especially for posted Indian citizens (nearly 170% increase) (Figure 5).

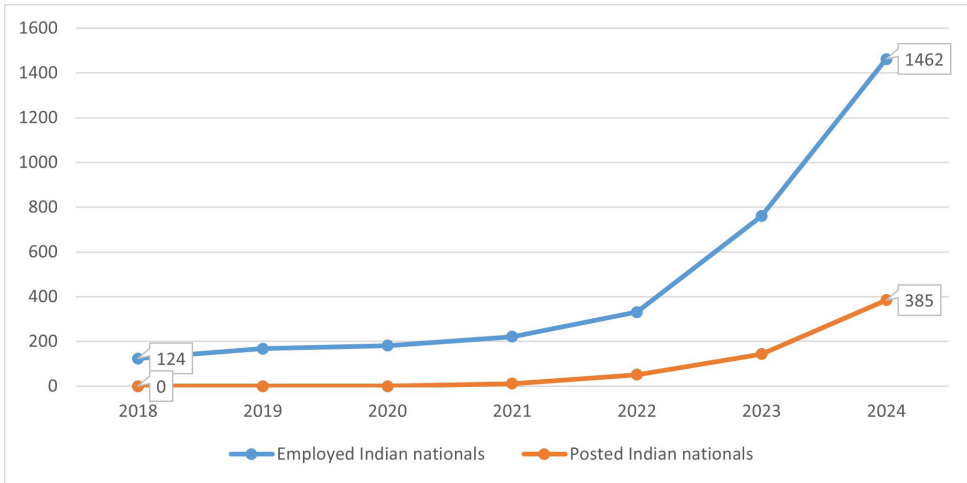


Figure 5: Number of employed Indian nationals in Slovenia and number of posted Indian nationals from Slovenia, 2018–2024 (source: unpublished data provided by the Statistical Office of Slovenia, 2025; and the Health Insurance Institute of Slovenia, 2025).

CONCLUSION

Labor migration to Slovenia has undergone significant changes over the last few decades. While Slovenia continues to show a “traditional reliance” on workers from the former Yugoslav region, who still represent the largest group of migrant workers in quantitative terms, there has been, particularly in the last few years, an increased recruitment of workers from South and Southeast Asia. These developments point to increasingly diverse trends in the geographical origins of labor migration to Slovenia. Although other forms of migration, such as forced migration, have become increasingly geographically diversified since 2000, especially during the “refugee crisis” in 2015, labor migration has lagged somewhat behind. It remains an open question to what extent this shift toward diversification in labor migration is a deliberate government and employer strategy, the result of structural demographic imbalances, and/or the perceived and often uncontested “emptying” of the “pool of workers” from the Western Balkans. However, the finding by Josipović and Trbanc (2012) that the sectors that contributed most to economic growth in Slovenia were construction, manufacturing, and retail sectors, where low-skilled and low-wage jobs are mostly concentrated, seems important in this regard, as these are the sectors that employ a high number of migrant workers also in Slovenia. As Menz (2015) shows, the language of competitiveness and the purported exigencies of the global economy advance political goals that might otherwise encounter significant political opposition. For instance, governments and businesses have sought to advance increasingly liberalized labor migration schemes linking them

to the prerogative of economic competitiveness despite a prevailing anti-immigration political climate. Anderson (2010) also claims that immigration controls shape the types of labor with particular relations to employers and to labor markets. Such could be the stipulations of the bilateral agreements on employment with Bosnia and Herzegovina and Serbia that the worker must remain with the same employer for a year before being able to change jobs, and the introduction of seasonal work in hospitality, which could channel migrant workers into short-term and generally more precarious employment arrangements. This could pose additional integration challenges and provide an important avenue for future research, particularly regarding the integration of new migrant groups from Asia.

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RESEARCH DATA ACCESSIBILITY STATEMENT

The authors state that the research data used in the article are held by the authors and are available upon reasonable request.

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POVZETEK

NOVE OBLIKE DELOVNIH MIGRACIJ V SLOVENIJO: OD ZAHODNEGA BALKANA DO AZIJE

Mojca Vah Jevšnik, Sanja Cukut Krilić

Na področju delovnih migracij v Slovenijo je prišlo do premika od več desetletnega zanašanja na delavce iz nekdanjih jugoslovanskih republik v fazo vse bolj raznolikih oblik zaposlovanja tujcev, med katere sodi tudi hitro rastoče zaposlovanje iz Južne in Jugovzhodne Azije. Z vztrajno in strukturno kadrovsko vrzeljo – pogojeno z demografskim upadom, nizko brezposelnostjo, staranjem prebivalstva ter nizko privlačnostjo določenih sektorjev za »lokalne« delavce – se je okrepila konkurenca tako na domačem trgu kot evropskem trgu delovne sile. To je delodajalce in državo spodbudilo k razširitvi nabora potencialnih delavcev. V preteklosti je slovensko povpraševanje po delovni sili zadovoljevala gosto prepletena mreža migracijskih tokov iz Bosne in Hercegovine, Srbije, Kosova in Severne Makedonije, pri čemer sta dvostranska sporazuma z Bosno in Hercegovino ter Srbijo omogočala institucionalizirane oblike zaposlovanja tujih delavcev. Ti migracijski kanali so po absolutnih številkah sicer še vedno prevladujoči, delavci iz teh držav pa še naprej zasedajo osrednja delovna mesta v gradbeništvu, predelovalnih dejavnostih, prometu in drugih delovno intenzivnih sektorjih, vključno z napotitvami v druge države članice EU. Ker pa delavce iz Zahodnega Balkana vse intenzivneje zaposlujejo tudi druge države EU in se tradicionalni bazen delovne sile postopoma oži, se je Slovenija v zadnjih letih začela usmerjati k azijskim državam. Prihodi delavcev iz Indije, Nepala, Bangladeša, Kitajske in Filipinov so se od leta 2022 izrazito povečali. To diverzifikacijo so dodatno utrdili novi politični ukrepi, zlasti memorandum o soglasju s Filipini ter odprtje slovenskega veleposlaništva v Manili, kar kaže na institucionalni premik k bolj formaliziranim, državno podprtim oblikam zaposlovanja. Avtorici v prispevku argumentirata, da ti procesi ne predstavljajo kratkoročnih nihanj, temveč odražajo širše strukturne premike, saj demografske projekcije napovedujejo trajno zmanjševanje delovno aktivnega prebivalstva, ki ga brez priseljevanja ne bo mogoče nadomestiti. Nastajajoča slovenska migracijska krajina tako združuje kontinuiteto – trajno odvisnost od Zahodnega Balkana – z novo fazo globaliziranega in razpršeneega zaposlovanja tuje delovne sile.

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