LABOUR MARKET INTEGRATION OF UKRAINIAN REFUGEES

2023 ANNUAL REPORT

TABLE OF CONTENTS

INTRODUCTION

In 2023, IOM's Displacement Tracking Matrix (DTM) collected data on the Needs, Intentions, and Integration Challenges of refugees from Ukraine in 11 countries in Central and Eastern Europe that are part of the IOM's Regional Ukraine Response: Belarus, Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Republic of Moldova, and Slovakia.[1]

This report presents the findings of surveys with Ukrainian citizens related to their employment profiles and job prospects in the countries hosting the displaced respondents. The analysis focuses on these respondents who are of working age (18 to 64 years old), are active on the labour market (either working or looking for work), and intend to remain in the country where the survey took place for the foreseeable future.

Data collection took place in three-month cycles (see diagram on the right), totaling 28,712 surveys. The large majority of respondents, 98 per cent, were Ukrainian (n=28,149) and 2 per cent were Third-Country Nationals (TCNs) (n=563). A total of 24,602 Ukrainian respondents were of working age and 17,149 intended to stay in the country of survey for the foreseeable future.

Among those, 11,290 were active in the labour market (either employed or looking for work). This group will be central to the analysis.

The analysis presented is based on data collected through a network of more than 150 enumerators, with various timelines and specific survey tools adapted to the country context. The sampling approach, main definitions and features of the survey tool make country-level datasets comparable. Respondents were approached in a simple random sample by enumerators at selected entry, exit, transit points and accommodation centres. Variation in the number of respondents in each country was due to differences in sampling strategies and types of locations covered during the reference period.[2] The survey was anonymous and voluntary. For information on the methodology and limitations please see the Methodology section.

Respondents informed on their intention to stay in the country where the survey took place for the foreseeable future or not. Those who did not intend to stay planned to return to Ukraine, to move to another country, were undecided on their plans, or were transiting through the country. Among Ukrainian respondents in 2023 (n=28,149), a majority of 70% intended to stay.

DATA COLLECTION PERIODS – 2023

Q1	Q2
January to March	April to June

Q3	Q4
July to September	October to December

Refugees from Ukraine receiving help from IOM staff in Bulgaria. © IOM 2023

1. Ukraine: IOM Response 2022-2024 | International Organization for Migration
2. In terms of the sampling strategies, some countries included border areas in their data collection while others did not. As for the reference period, some countries included new arrivals in the pool of respondents while others did not. Please refer to the Methodology for more details.

Figure 1: Shares of respondents who intended and did not intend to stay, by age group and country of the survey, 2023 (%) n=28,712

	Bulgaria	Belarus	Czechia	Estonia	Hungary	Lithuania	Latvia	Republic of Moldova	Poland	Romania	Slovakia	Total
Do not intend to stay	25%	37%	19%	6%	49%	5%	85%	44%	57%	33%	8%	30%
Intend to stay, non-working age (65+)	17%	16%	7%	5%	6%	14%	−1%	10%	5%	6%	16%	9%
Intend to stay, working age (18-64)	58%	47%	73%	89%	44%	81%	13%	46%	38%	61%	76%	61%

● Intend to stay, working age (18-64 years old) ● Intend to stay, non-working age (65+ years old) ○ Do not intend to stay

FOCUS OF THIS REPORT

The report presents the findings of surveys with Ukrainian citizens, discussing their employment profiles and prospects in the host countries. Specifically, it focuses on those who intend to remain. Among those who intend to stay, the report expands on the findings of the 11,290 who are of working age (18 to 64 years old) and active in the labour market, including the sectors of employment and differences among men and women.

Maternity/paternity leave is included among inactive because 1) in Ukraine, benefits are not dependent upon an employment contract and are received for quite a long period, and 2) in the host countries, pregnant or breastfeeding women may have not yet tried to look for a job at the time of the survey.

KEY FINDINGS

Employment rate by age group in the host countries

18-29 years old — **72%**

30-39 years old — **68%**

40-49 years old — **67%**

50-59 years old — **60%**

60 to 64 years old — **51%**
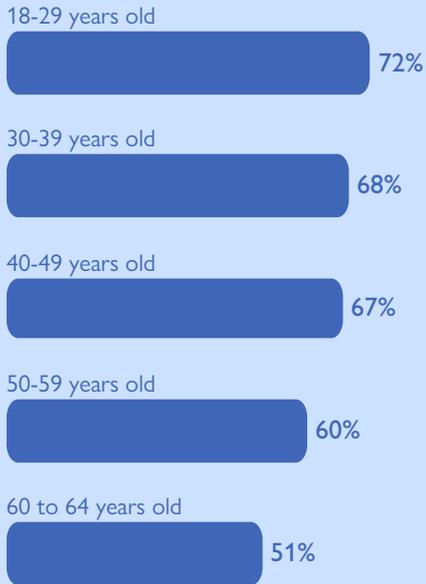
Employment rate by knowledge of local language

Full or some knowledge — **74%**

No knowledge — **53%**
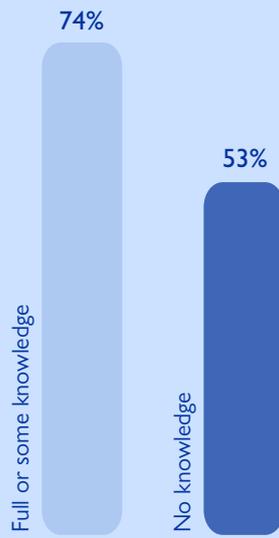
Economic activity in the host countries

6%

28%

22%

44%

Active **66%**

- Employed
- Unemployed, looking for work
- Inactive
- N/A*

Women

(n=8,907)

4%
9%
35%
52%

- Employed
- Unemployed, looking for work
- Daily worker
- Self-employed

Men

(n=2,383)

8%
5%
26%
61%

- Employed
- Unemployed, looking for work
- Daily worker
- Self-employed
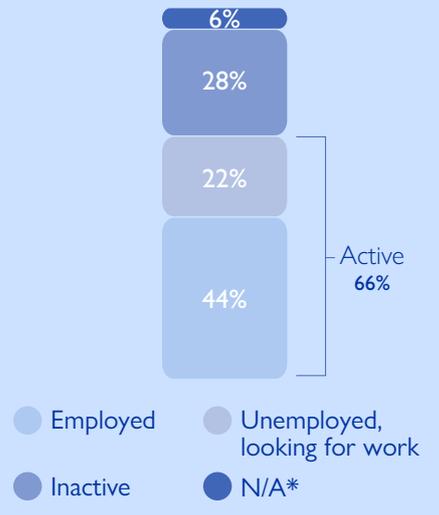
Employment rate by length of stay in the host countries

Less than 1 month — **31%**

1-6 months — **53%**

7-12 months — **69%**

13-18 months — **76%**

19-24 months — **74%**

More than 24 months — **94%**
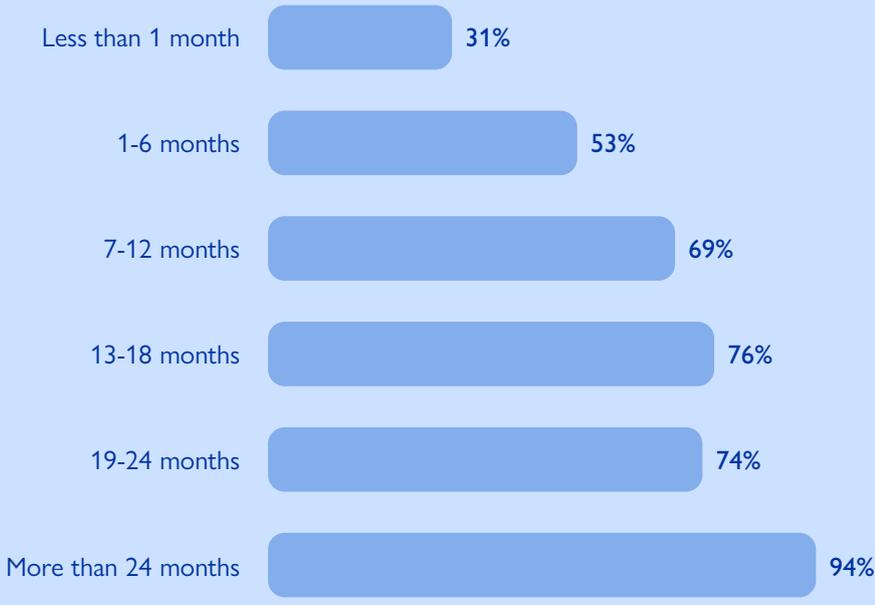
Including regular employment, daily labour, and self-employment.

*N/A includes respondents indicating they don't know, prefer not to answer, or the answer was not given.

Map 1: Percentage of Ukrainian refugees active in the labour market by host country, status and top sectors of employment in 2023

Active working age respondents

11,290

Share of active respondents among those of working age

- 81% - 84%
- 71% - 80%
- 61% - 70%
- 51% - 60%
- 48% - 50%

Status

Unemployed

Employed

Top sectors

- Accommodation and food service activities
- Education
- Transportation
- Manufacturing
- Other services
- Wholesale and retail

ESTONIA
29% 71%

LATVIA
45% 55%

LITHUANIA
38% 62%

BELARUS
30% 70%

POLAND
24% 76%

CZECHIA
32% 68%

SLOVAKIA
41% 59%

HUNGARY
38% 62%

UKRAINE

REPUBLIC OF MOLDOVA
36% 64%

ROMANIA
47% 53%

BULGARIA
40% 60%

This map is for illustration purposes only. Names and boundaries on this map do not imply official endorsement or acceptance by IOM.

* According to the International Labour Organization (ILO), the term "active population" refers to the people in a country or area who normally work and earn money. It includes both employed (those who have jobs) and unemployed (those who are seeking employment) individuals.

REGIONAL OVERVIEW

Figure 2: Share of working age respondents (active and inactive), by gender and country of survey, 2023 (%) n=17,149

1,536	430	3,670	2,106	618	155	1,345	1,044	1,158	3,105	1,982	17,149

Belarus 12% / 88%; Bulgaria 27% / 73%; Czechia 20% / 80%; Estonia 25% / 75%; Hungary 16% / 84%; Latvia 37% / 63%; Lithuania 11% / 89%; Poland 10% / 90%; Republic of Moldova 11% / 89%; Romania 19% / 81%; Slovakia 22% / 78%; Total 18% / 82%
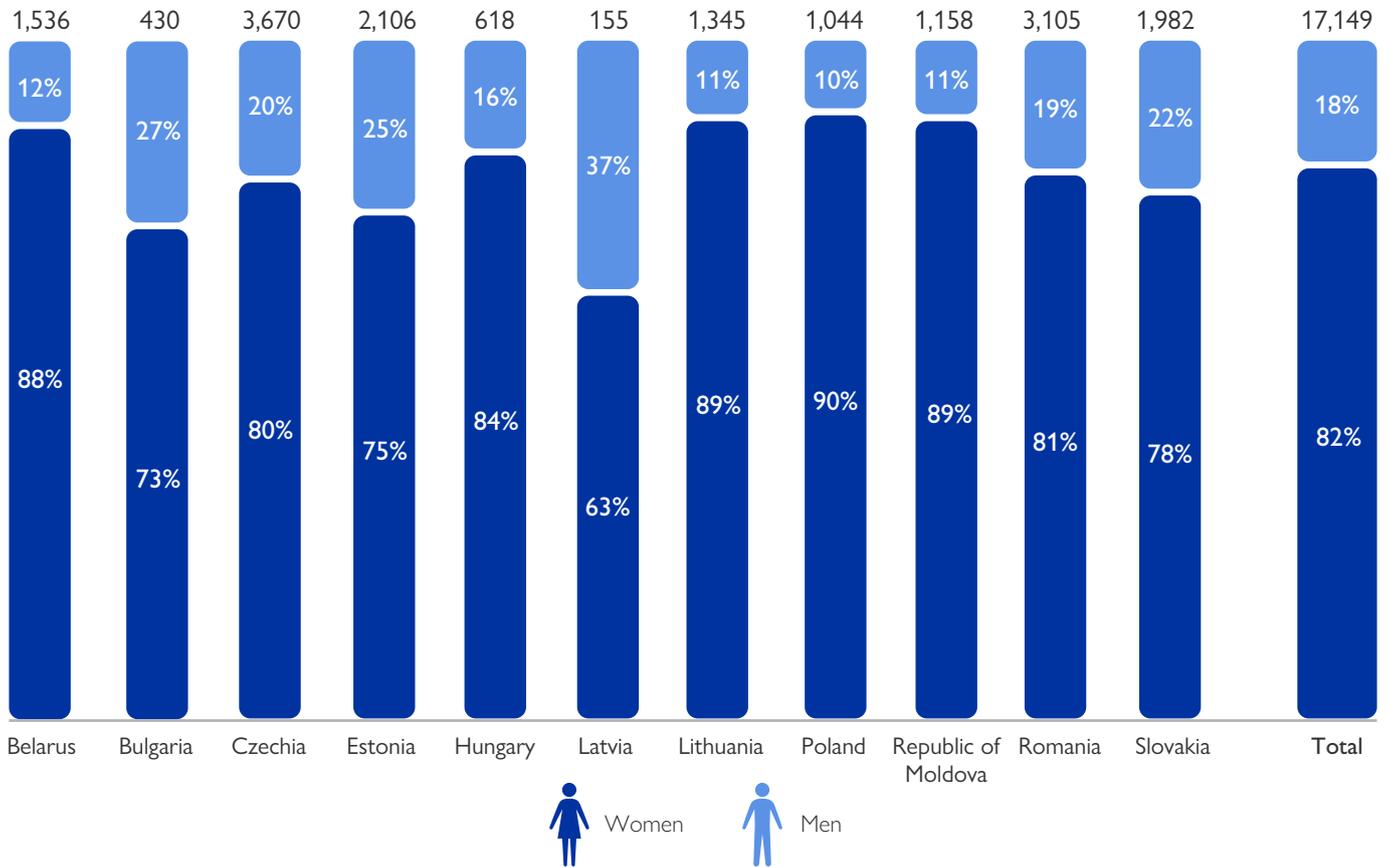
Women   Men

DURATION OF STAY IN THE HOST COUNTRY

Overall, slightly more than a quarter (26%) of the interviewed people had been in the country of survey for less than 6 months. Another quarter (28%) had been in the host country between 7 and 12 months, while almost half (47%) of them were displaced for more than one year.

Throughout the course of 2023, larger shares of respondents were in the host country for longer periods at the time of the survey. In Q1 of 2023, only 17 per cent of respondents had been displaced for over one year, which increased to almost half (48%) of those interviewed in Q2. In Q3, the share of respondents who had been out of Ukraine for over one year increased to 73 per cent. By the fourth quarter (Q4) 68 per cent of respondents had been abroad for over one year, which was a slight decrease compared to Q3 but remained significantly higher than in Q1 (17%).

Figure 3: Share of working age respondents (active and inactive) by time spent in host countries (%), n=17,149

	Less than 30 days	1 to 6 months	7 to 12 months	13 to 18 months	19 to 24 months	More than 2 years
Q1	13	19	51	15		2
Q2	15	13	24	46		2
Q3	7	7	13	55	12	6
Q4	10	10	12	21	46	2

Less than 30 days   1 to 6 months   7 to 12 months
13 to 18 months   19 to 24 months   More than 2 years

LABOUR MARKET PARTICIPATION

Two-thirds of respondents indicated that they were active in the labour market prior to leaving Ukraine and following displacement while being hosted in current country. However, the proportion of those who were unemployed in the host country was larger (22%) than the proportion of those who were unemployed before displacement (6%).
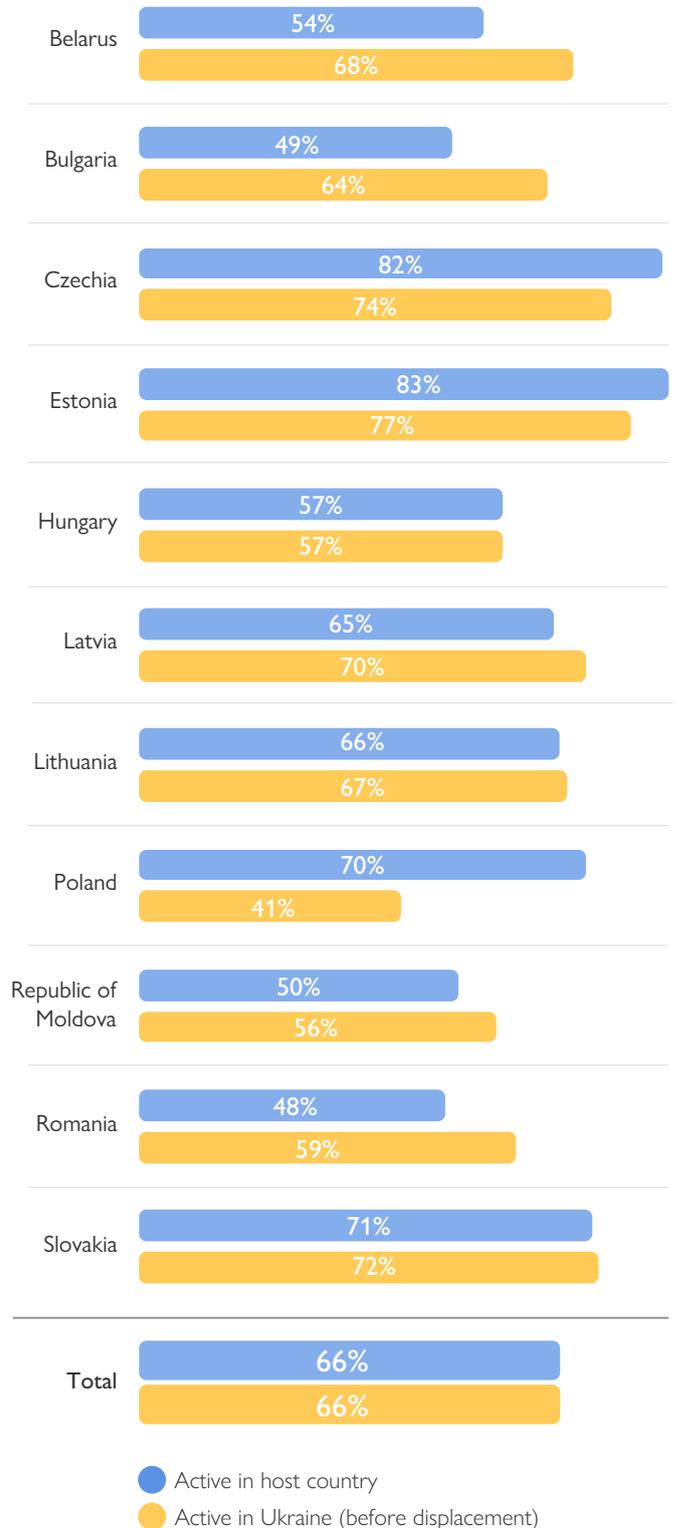
Similar percentage of respondents were inactive before displacement (31%) and in the host country (28%). Some respondents indicated they did not know or preferred not to answer on their employment status (3% before displacement and 6% in the host country).

Figure 4: Employment status before and after displacement, total (%), n=17,149
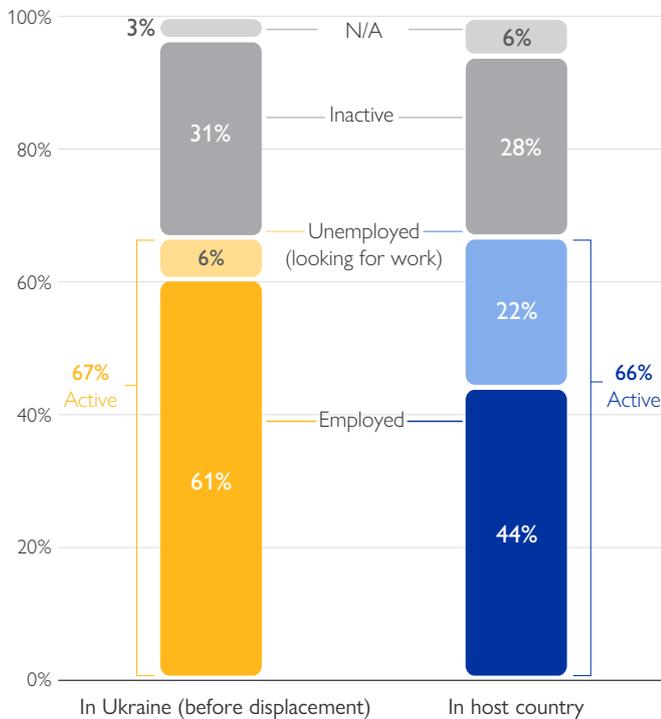
Prior to displacement, the proportion of men who were active in the labour market (including unemployed and searching for work) was higher (74%) compared to women (64%). A similar trend was present in the hosting countres in 2023: 75 per cent of men were active compared to 63 per cent of women in the country of survey.[3]

Figure 5: Percentage of active respondents before displacement and in the host country, 2023 (%) n=11,290

Belarus — 54% / 68%
Bulgaria — 49% / 64%
Czechia — 82% / 74%
Estonia — 83% / 77%
Hungary — 57% / 57%
Latvia — 65% / 70%
Lithuania — 66% / 67%
Poland — 70% / 41%
Republic of Moldova — 50% / 56%
Romania — 48% / 59%
Slovakia — 71% / 72%
Total — 66% / 66%

● Active in host country
● Active in Ukraine (before displacement)

---

3. The absolute number of men was much smaller than that of women.

The participation in the labour market was high among Ukrainians across all countries where the survey took place. Hence, even with the caveats and limitations related to the self-reporting nature of the information on the employment status by respondents, these findings are in line with existing evidence on the inclusion of refugees from Ukraine in the European labour markets, which appears to be faster on average than for other refugee populations.[4,5]

Figure 6: Breakdown of status of inactive respondents, before displacement and in the host country, 2023 (%) n=5,344

IN UKRAINE (BEFORE DISPLACEMENT)
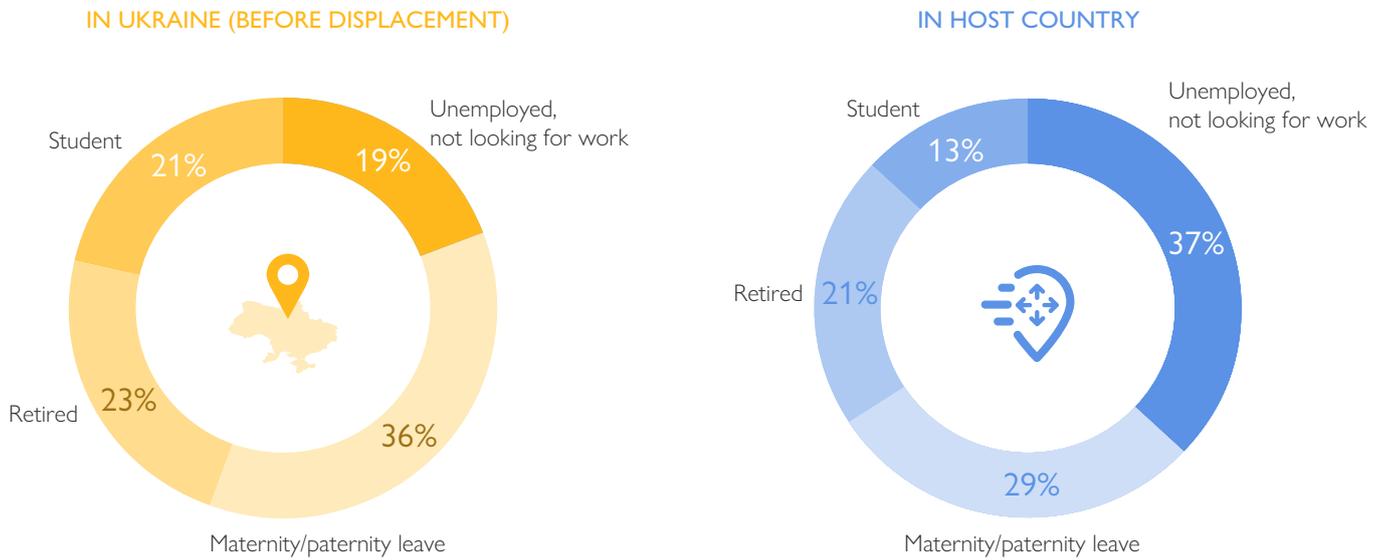
IN HOST COUNTRY

The share of students decreased from 21 per cent in Ukraine to 13 per cent in the host country. The share of retirees remained similar (23% in Ukraine and 21% in the host countries). Respondents who were on parental leave decreased slightly from 36 per cent in Ukraine to 29 per cent the host countries. The proportion of those who were unemployed and not searching for work increased from 19 per cent in Ukraine to 37 per cent in the host countries.

Some of those who were unemployed and not seeking work indicated that they were out of the labour market because they had family care duties (e.g., children, older people, and people with a disability). Others declared they had a medical condition or had no need to work because others in their household were employed.

Ukrainian women and children transit through Budapest, Hungary. © IOM 2022

4. OECD. 2023. 'What We Know about the Skills and Early Labour Market Outcomes of Refugees from Ukraine'. Paris: OECD.
5. The better integration of Ukrainian refugees is likely related to the rights under temporary protection, which support integration (e.g., direct access to the labour market, language courses, etc.) compared to other statuses.

GENDER, AGE, EDUCATION, AND THE LANGUAGE BARRIER IN EMPLOYMENT

Focusing on the active labour force, some factors seem to be more or less conducive to employment in the current host country.

Although they were a minority in the sample and among the refugee population, men tended to be more frequently employed than women (73% versus 65% on average). Employment rates of women were lower than men's in Belarus (-7%), Bulgaria (-11%), Czechia (-14%), Estonia (-13%), Lithuania (-10%), Romania (-3%), and Slovakia (-16%) and were similar in the Republic of Moldova (0%). Active working age women with an intention to stay in the country were more frequently employed than men in Hungary (+1%), Poland (+13%), and Latvia (+6%).

On average, respondents who intended to stay reported higher rates of unemployment in the host countries than in Ukraine, but with some differences across countries. The unemployment rate in the host countries was 20 percentage points higher than before displacement in Hungary, Czechia, Estonia, the Republic of Moldova, and Poland.

> Younger respondents were more frequently employed than older ones: 72 per cent of respondents between the ages of 18 and 29 were employed, compared to 51 per cent of those between the ages of 60 and 64. Respondents who were alone or in a household without children were more frequently employed than those with children, especially if the children were under 5 years of age. Having full or some knowledge of the official language of the host country was also associated with higher shares of employment (75%) compared to those with no local language knowledge at all (62%).

The amount of time spent in the host country also played a role in the probability of being employed. Data show a positive relationship between the duration of displacement in the country of survey and the probability of being employed, irrespective of the period in which the survey was collected during 2023. The employment rate of those who spent between 1 and 6 months in the country was 53 per cent, compared to an employment rate of 74 per cent among those who spent between 19 and 24 months in the country.

The amount of time spent in a country contributes to how an individual becomes established in a new context and progressively moves from more temporary or emergency solutions to more stable and autonomous ones, which may explain why employment rates were higher among those who have been in the country of survey for a longer time.[6]

Among respondents who were active in the labour market the host countries, the employment rate was slightly higher in non-neighbouring countries than in neighbouring ones (69% and 63%, respectively).

While the education level of respondents was not associated with higher/lower rates of employment, it marked a difference in terms of type of occupation and sectors among those who were employed at the time of the survey. Respondents with a tertiary education were more frequently working in a professional job (28%) – working in services and sales (17%), in elementary occupations (16%) and as clerks (8%) – education (12%), manufacturing (11%) and information and ICT (10%). Respondents with secondary education or lower were in elementary occupations (31%) – including services and sales (21%), as plant or machine operators (19%) or in crafts and related trades (11%) – manufacturing (19%), other services activities (18%), and accommodation and food services (13%).

Although data on type of occupation was available for only a small portion of respondents, the shares of respondents working in managerial, professional and technical occupations in Ukraine before displacement decreased in favour of machine operators and elementary occupations in the host countries. Also, remote work for an employer in Ukraine or elsewhere was more common among tertiary educated workers than others (18% versus 4% of respondents who were employed in Q4 of 2023).

At the same time, the feeling of being able to use one's educational and professional experience at work was mentioned by 51 per cent of those with tertiary education, and by 56 per cent of those with secondary and lower education, pointing to slightly more difficult skill matching for professionals and technicians than for others.

> Language was by far the main barrier when seeking a job, mentioned by three quarters of respondents in search of employment in Czechia, Lithuania, and Slovakia.[7] Among those who were active in the labour market in the host country, respondents speaking the local language were, on average, employed at rates 13 percentage points higher than those who could not speak the language ("language premium"). Other barriers frequently mentioned were the lack of jobs in the area of residence, difficulties in balancing family duties and working arrangements, health conditions, and discrimination.

---

6. More than half of the sample on average arrived within the first half of 2022 (soon after the start of the war).
7. This question was not asked in the remaining countries.

Figure 7: Unemployment rates (looking for work) before displacement and in the host country among those active, (%)
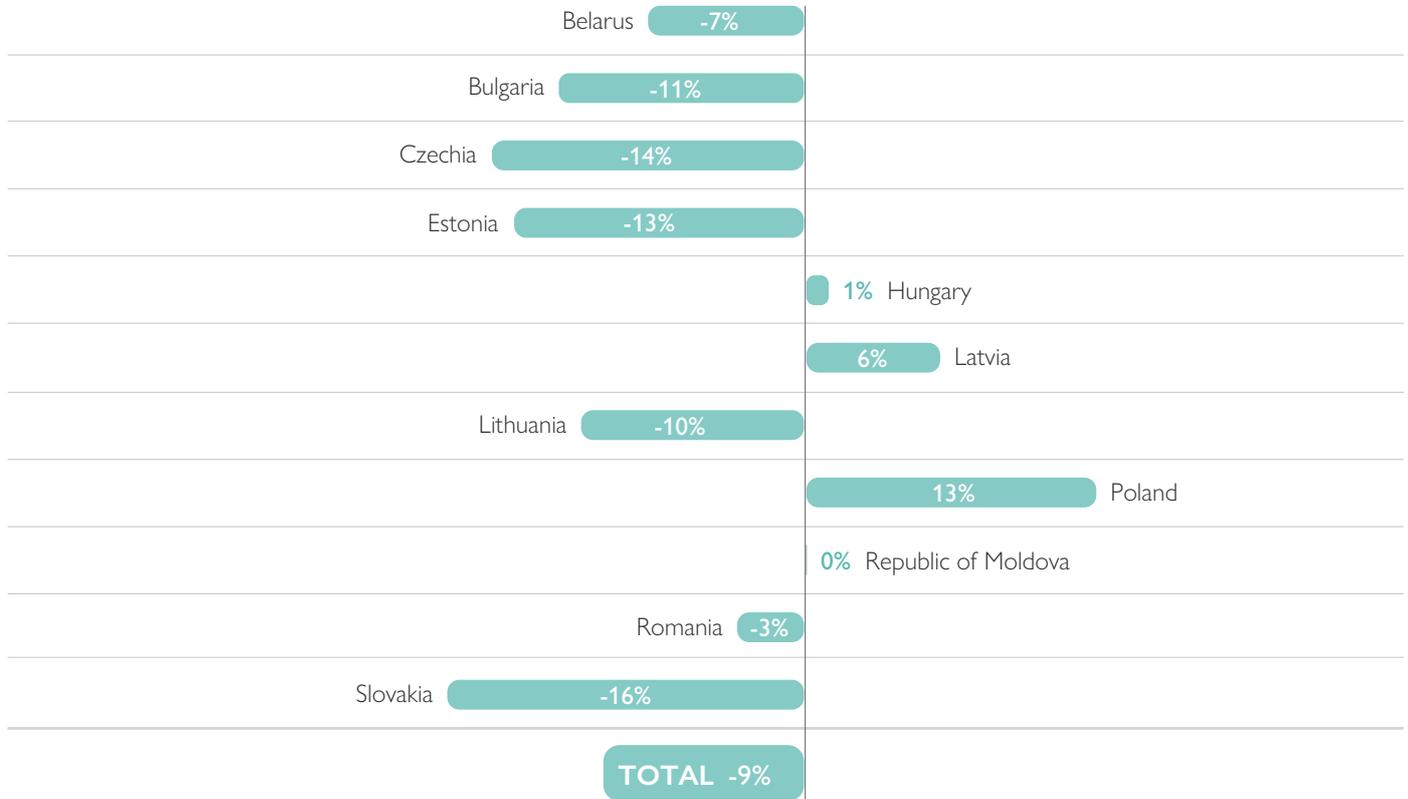

Unemployment rate in Ukraine (n=11,327)

Unemployment rate in host country (2023) (n=11,290)
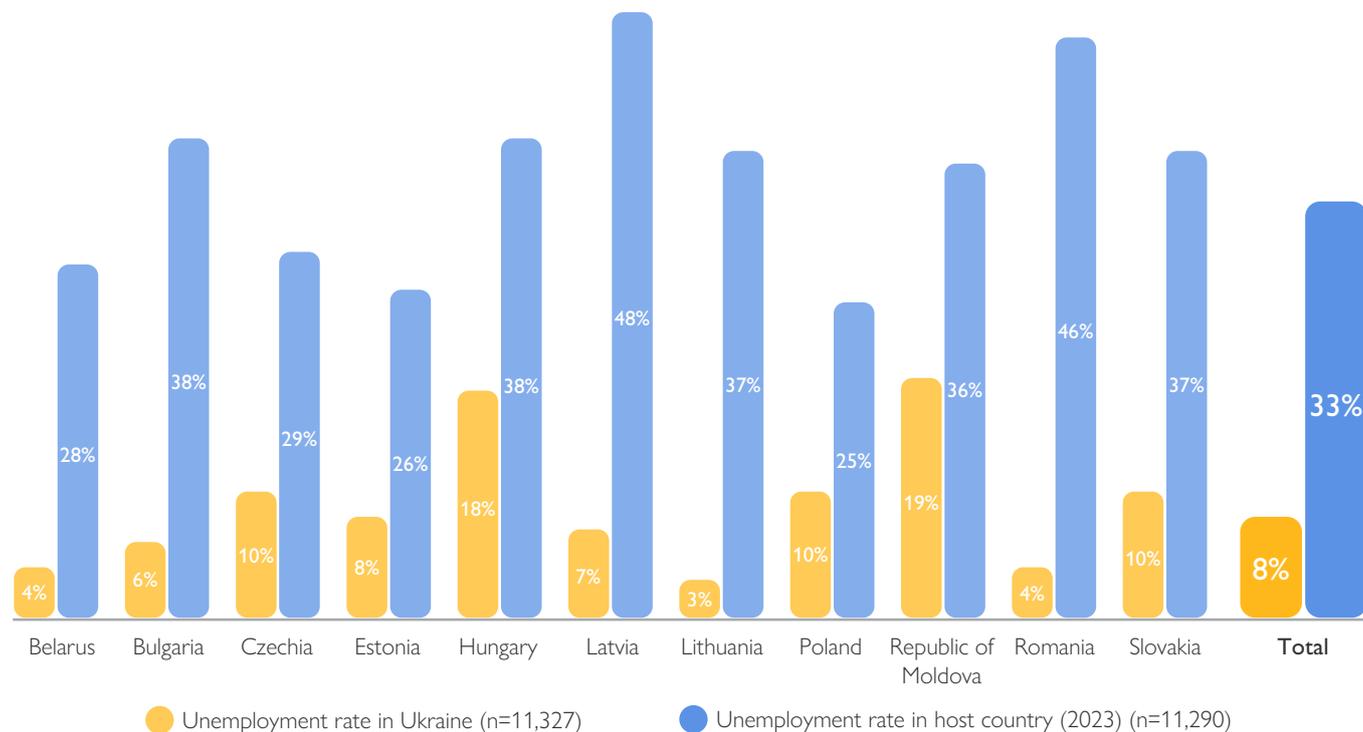
Figure 8: Employment rates by knowledge of local language, 2023 (%) n=11,290

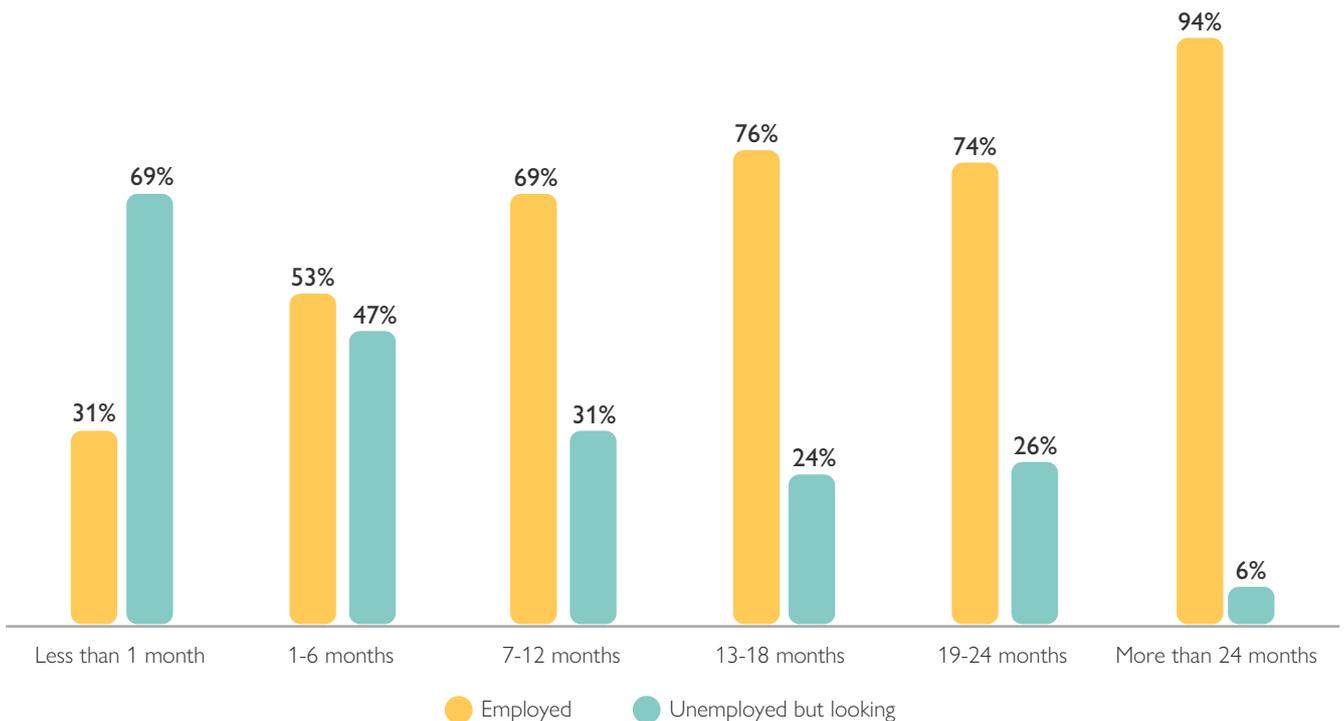Full or some knowledge of local language

No knowledge of local language
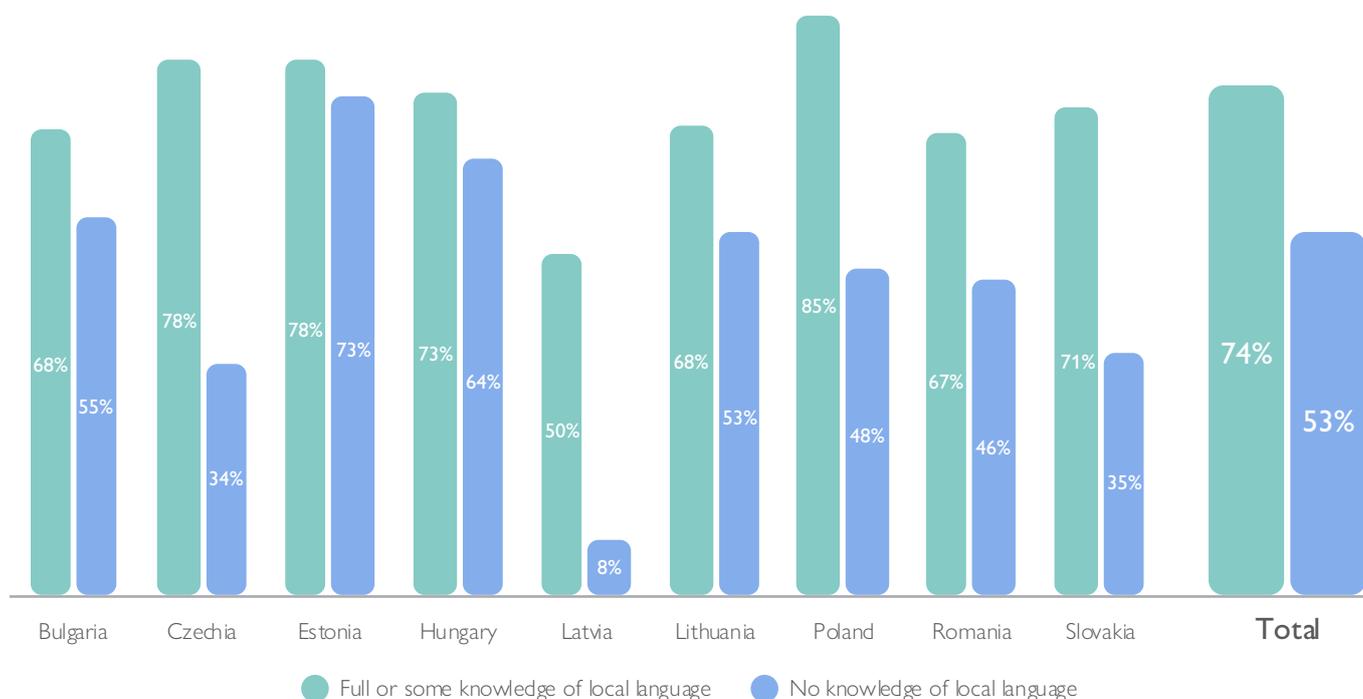
Notes: Employment rate includes regular employment, daily work, and self-employment. All respondents in Belarus and in the Republic of Moldova are fluent in Russian, which is also widely known and used by the host communities in these two countries.

Figure 9: Difference in employment rates between women and men, by country of survey and total, 2023 (%) n=11,290

In the below graph, women's employment rate is lower than that of men in countries with negative values and higher in countries with positive values. On average in the 11 countries where the survey took place, the employment rate among women is 9% less than that of men.

Country	Value
Belarus	-7%
Bulgaria	-11%
Czechia	-14%
Estonia	-13%
Hungary	1%
Latvia	6%
Lithuania	-10%
Poland	13%
Republic of Moldova	0%
Romania	-3%
Slovakia	-16%
TOTAL	-9%

Figure 10: Share of employed and unemployed in the host country by time spent in country, 2023 (%), n=11,290

	Employed	Unemployed but looking
Less than 1 month	31%	69%
1-6 months	53%	47%
7-12 months	69%	31%
13-18 months	76%	24%
19-24 months	74%	26%
More than 24 months	94%	6%

*Note: Employed includes regular employment, daily labour, and self-employment.*

NEIGHBOURING COUNTRIES

BELARUS

About half (47%) of the Ukrainian respondents surveyed in Belarus[8] intended to stay for the foreseeable future and were of working age. The below analysis focuses on this group.

A larger proportion of respondents were active in the labour market in Ukraine before displacement compared to those active in Belarus in 2023. Over two-thirds (68%) were active before displacement, and the remaining 32 per cent were inactive (either retired, students, or unemployed and not searching or not available for work). In 2023, 54 per cent of respondents were active in the labour market, while 21 per cent were inactive. Data on the working status of the remaining 25 per cent of respondents was not available.

Figure 11: Activity status before and after displacement (%), n=430
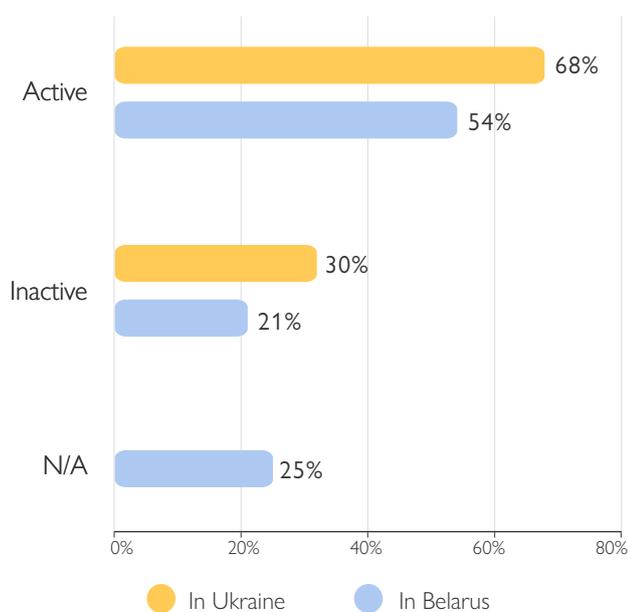
Among those who were active in the labour market, just over two-thirds (64%) were employed, 28 per cent were unemployed and searching for work, 5 per cent engaged in daily work, and 3 per cent were self-employed.

Just over three in five female respondents (62%) were employed, which was slighter lower than the 69 per cent of men in the same category who were employed.

Figure 12: Employment status among those active in the labour market in Belarus, 2023 (%) n=232
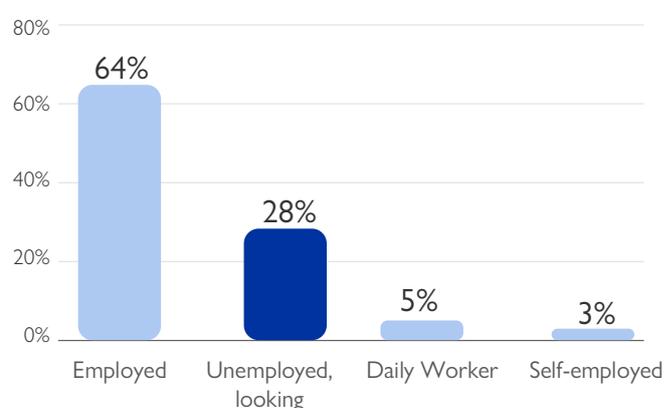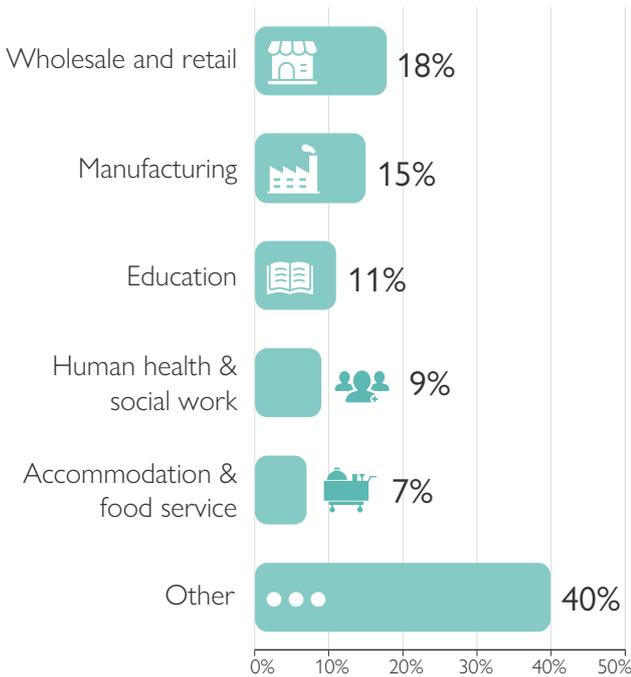

Among those who were active in the labour market in 2023, seven out of ten (71%) had been in the Belarus between seven months and one year. Those who were unemployed had in general been in the country for a shorter amount of time, a combined 51 per cent under six months. Seven out of ten (73%) respondents who engaged in daily work had been in the country less than six months. Most respondents who were self-employed had been in Belarus between seven months and one year (86%).

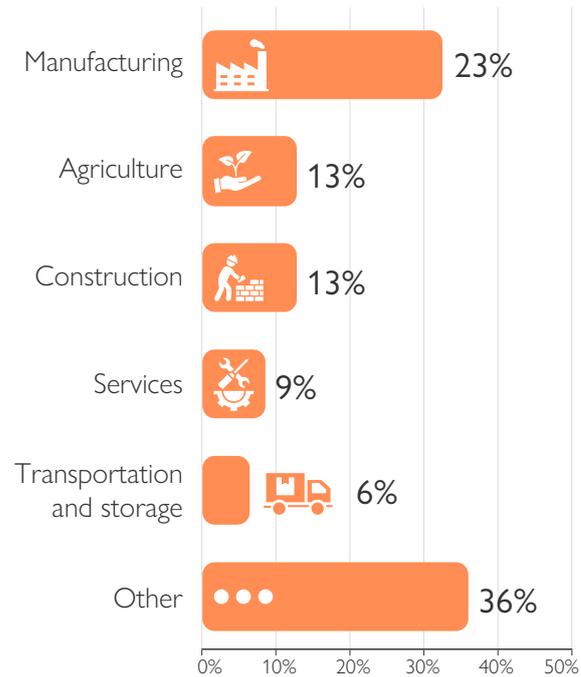**Table 5:** Employment status by time in Belarus, 2023 (%) n=232

TIME IN BELARUS	EMPLOYED	UNEMPLOYED, LOOKING FOR JOB	DAILY WORKER	SELF-EMPLOYED	TOTAL
Less than 30 days	0%	18%	0%	0%	5%
1-6 months	22%	33%	73%	14%	27%
7-12 months	71%	42%	27%	86%	61%
13-18 months	7%	6%	0%	0%	6%
More than 2 years	<1%	0%	0%	0%	1%

---

8. Data in Belarus was only collected during Q1 2023.

Figure 13: Top five employment sectors among Ukrainian women in Belarus, 2023 (%) n=101

Wholesale and retail	18%
Manufacturing	15%
Education	11%
Human health & social work	9%
Accommodation & food service	7%
Other	40%

Figure 14: Top five sectors of employment among Ukrainian men in Belarus, 2023 (%) n=47

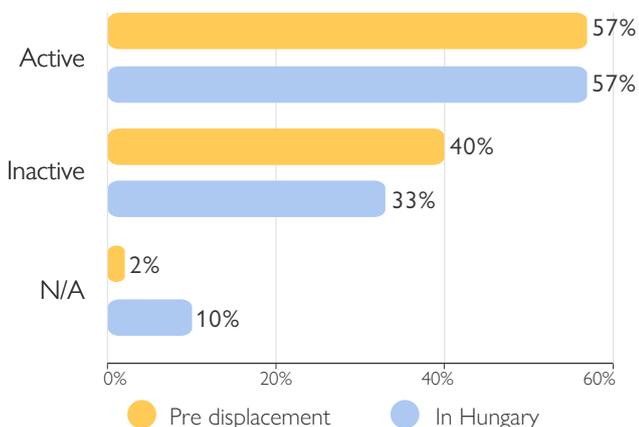|	
Manufacturing	23%
Agriculture	13%
Construction	13%
Services	9%
Transportation and storage	6%
Other	36%

HUNGARY

Over one-third (38%) of the Ukrainian respondents surveyed in Hungary intended to stay in the country for the foreseeable future and were of working age. The below analysis focuses on this group.

The same proportion of respondents were active in the labour market in Hungary in 2023 as were active in the Ukrainian labour market prior to displacement (including those who were unemployed and looking for work). Fifty-seven per cent were active in Ukraine before displacement and 40 per cent were inactive (the pre-displacement working status of 2 per cent of respondents was not available). In Hungary, 57 per cent of

respondents were active in the labour market in 2023, while 33 per cent were inactive (the working status of one in ten was unknown).

Among those active in the labour market, half (51%) were employed, 38 per cent were unemployed and seeking work, 6 per cent engaged in daily work and 5 per cent were self-employed. Women had an employment rate of 52 per cent compared to 47 per cent of men.

Figure 16: Employment status among those active in the labour market in Hungary, 2023 (%) n=351

Figure 15: Activity status before and after displacement (%), n=618

	Pre displacement	In Hungary
Active	57%	57%
Inactive	40%	33%
N/A	2%	10%
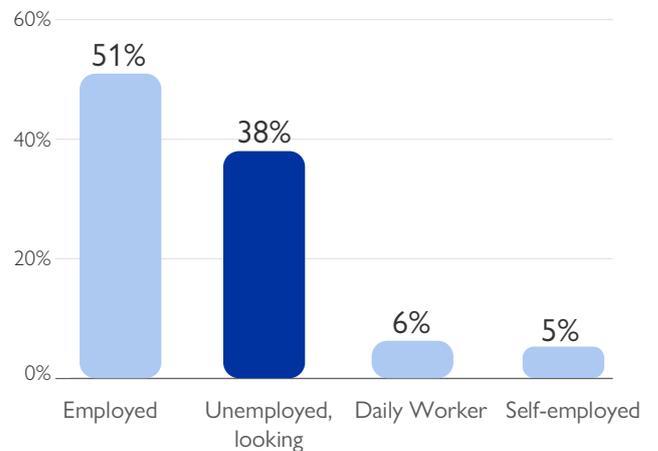
The largest shares of economically active respondents in 2023 who were employed (32%), unemployed and looking for work (36%), and engaged in daily work (30%) had been in Hungary for less than one month. An equal proportion of self-employed respondents had been in Hungary for less than a month and between 19 and 24 months (28% each).

Table 6. Employment status by time in Hungary, 2023 (%) n=351

TIME IN HUNGARY	EMPLOYED	UNEMPLOYED, LOOKING FOR JOB	DAILY WORKER	SELF-EMPLOYED	TOTAL
Less than 30 days	32%	36%	30%	28%	33%
1-6 months	11%	10%	5%	17%	10%
7-12 months	21%	24%	20%	22%	22%
13-18 months	14%	19%	20%	5%	16%
19-24 months	20%	10%	25%	28%	17%
More than 2 years	2%	1%	0%	0%	2%

Over one-third of female respondents worked in manufacturing, followed by 18 per cent in services, 6 per cent in information and communication, 6 per cent in wholesale and retail, and 5 per cent in education. Among male respondents, two out of five (42%) worked in manufacturing, followed by 27 per cent in construction, 12 per cent in information and communication, 4 per cent in human health and social work, and 4 per cent in agriculture.

Figure 17: Top five employment sectors among Ukrainian women in Hungary (%) n=124
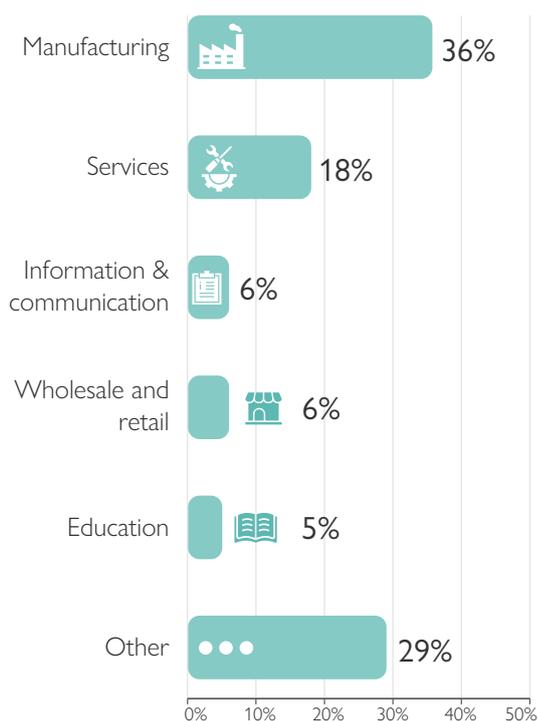
Figure 18: Top five employment sectors among Ukrainian men in Hungary (%) n=26

POLAND

Among the Ukrainian respondents surveyed in 2023, over two out of five (43%) intended to stay in Poland and were of working age. The below analysis focuses on this group.

A much larger proportion of respondents in Poland were active in the labour market compared to the proportion who were previously active in the Ukrainian labour market (including those who were unemployed and seeking work). Two out of five (41%) respondents were active in Ukraine before displacement and one out of five (19%) were inactive (the pre-displacement working status of 40 per cent of respondents was not available). In Poland, seven out of ten (70%) of the individuals interviewed were active in the labour market at the time of the assessment, while 26 per cent were inactive (the working status of 3% was unknown). Among the active, over half (58%) were employed, 24 per cent were unemployed and looking for a job, 7 per cent engaged in daily labour, 5 per cent worked remotely for an employer based in Ukraine, 5 per cent were unemployed, and 1 per cent were in the process of being hired.

Figure 19: Activity status before and after displacement (%), n=1,044n=618

In Ukraine   In Poland
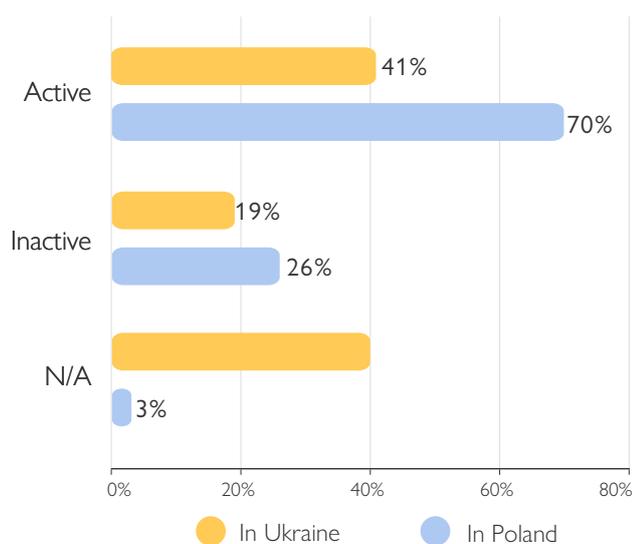
Women, who constitute 80 per cent of those who intend to stay in the country and are of working age, had an employment rate of 59 per cent compared to 48 per cent of men in the same category.

The largest share of those who were active in the labour market in 2023 had been in Poland for seven months to one year, along with 36 per cent of those who were unemployed and looking for work, 35 per cent of daily workers, 61 per cent of remote workers. Among those who were self-employed, 37 per cent had been in the country for 13 to 18 months. More than half (56%) of respondents were in the process of being hired had been in Poland between one and six months.

Figure 20: Employment status among those who were active in the labour market in Poland, 2023 (%) n=735
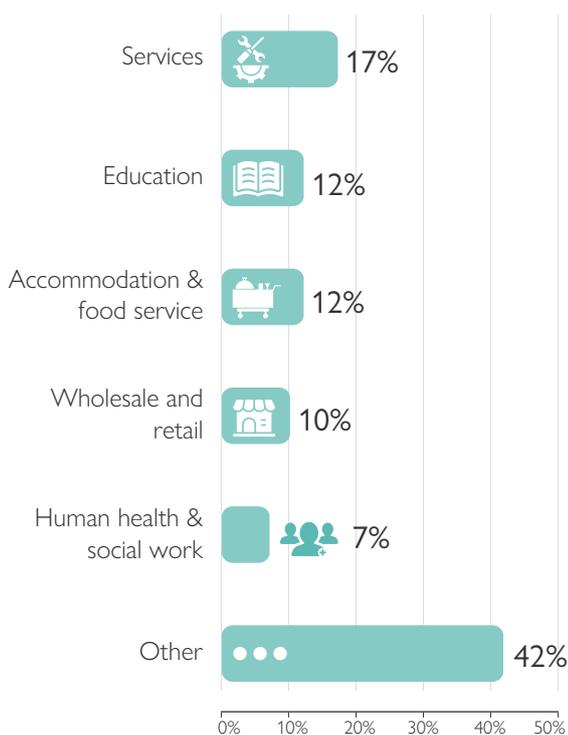

Table 7. Employment status by time in Poland, 2023 (%) n=735

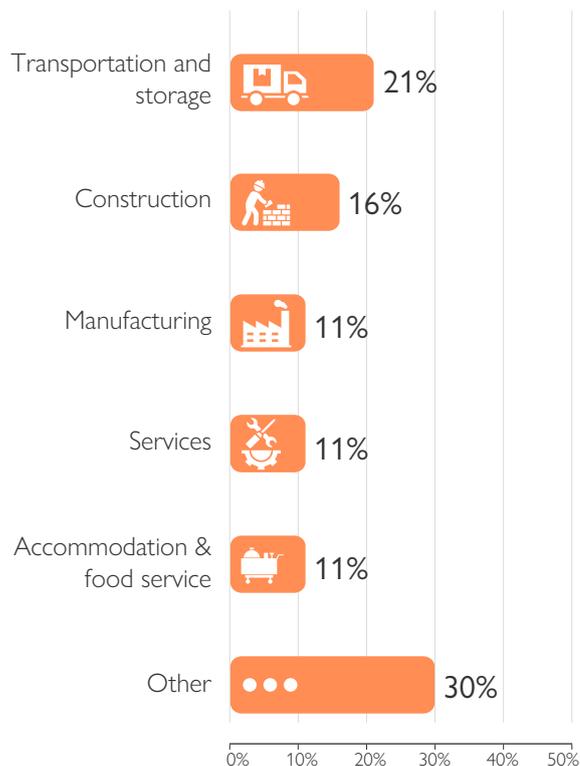| TIME IN POLAND	EMPLOYED	UNEMPLOYED, LOOKING FOR JOB	DAILY WORKER	REMOTELY WORK WITH EMPLOYER IN UKRAINE	SELF-EMPLOYED	IN RECRUITMENT PROCESS	TOTAL
Less than 30 days	13%	32%	12%	6%	9%	0%	17%
1-6 months	8%	22%	18%	33%	11%	56%	14%
7-12 months	42%	36%	35%	61%	17%	44%	40%
13-18 months	20%	6%	20%	0%	37%	0%	16%
19-24 months	16%	4%	15%	0%	26%	0%	12%
More than 2 years	1%	0%	0%	0%	0%	0%	1%

One out of six (17) women in Poland were in the services sector. Twelve per cent reported working in education, 12 per cent in accommodation and food service, one out of ten (10%) in wholesale and retail, and 7 per cent in human health and social work. One out of five (21%) people worked in transportation and storage, followed by 16 per cent in construction, 11 per cent in manufacturing, 11 per cent in services, and 11 per cent in accommodation and food service.

Figure 21: Top five employment sectors among Ukrainian women in Poland (%) n=255

Figure 22: Top five employment sectors among Ukrainian men in Poland (%) n= 19

Services	17%
Education	12%
Accommodation & food service	12%
Wholesale and retail	10%
Human health & social work	7%
Other	42%

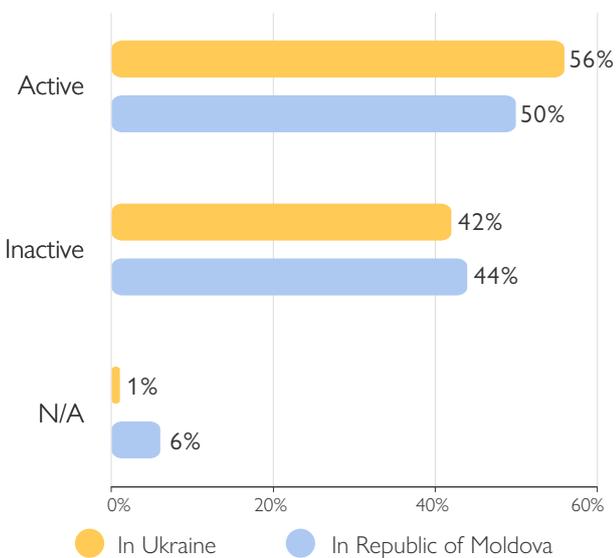|	
Transportation and storage	21%
Construction	16%
Manufacturing	11%
Services	11%
Accommodation & food service	11%
Other	30%

An IOM staff surveys a Ukrainian woman on her needs in order for IOM to provide support at a reception centre in Przemyśl, Poland. © IOM 2023

REPUBLIC OF MOLDOVA

Among the Ukrainian respondents surveyed in the Republic of Moldova in 2023, more than half (56%) intended to stay in the country and were of working age. The below analysis focuses on this group.

A slightly larger proportion of the surveyed individuals were active in the labour market in Ukraine before displacement compared to the proportion active in the labour market in the Republic of Moldova in 2023 (including those who were unemployed and searching for work). Over half (56%) of the group analysed in this report were active in the labour market in Ukraine before displacement, 42 per cent were inactive, and the pre-displacement working status of 1 per cent was not available. At the time of the survey, half (50%) of respondents were active in the labour market in the Republic of Moldova, while 44 per cent were inactive (the working status of 6 per cent of respondents was unknown).

Among those who were active in the labour market, 44 per cent were employed, 36 per cent were unemployed and looking for work, 16 per cent engaged in daily work, and 4 per cent were self-employed.

Forty-four per cent of Ukrainian women surveyed were employed in the Republic of Moldova compared to 47 per cent of men.

Among those who were active in the labour market in the Republic of Moldova in 2023, the largest proportion (36%) had been in the country between 13 and 18 months, along with 29 per cent of daily workers. Among those who were unemployed, one-third (33%) had been in the country between 19 and 24 months, along with half (50%) of those who were self-employed.

Figure 23: Activity status before and after displacement (%), n=1,158

Figure 24: Employment status among those who were active in the labour market in the Republic of Moldova, 2023 (%) n=577
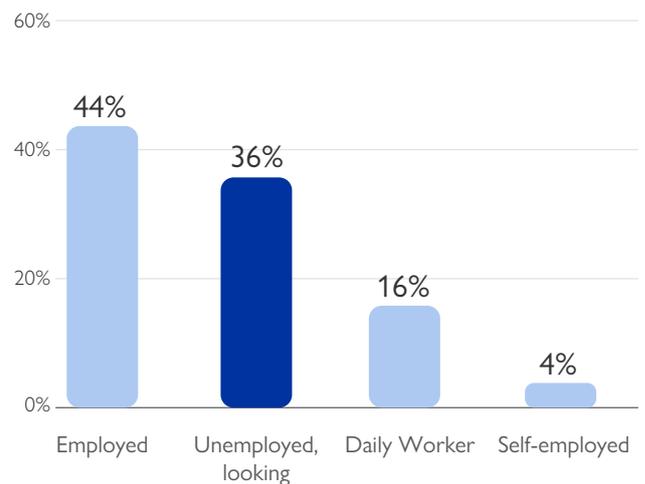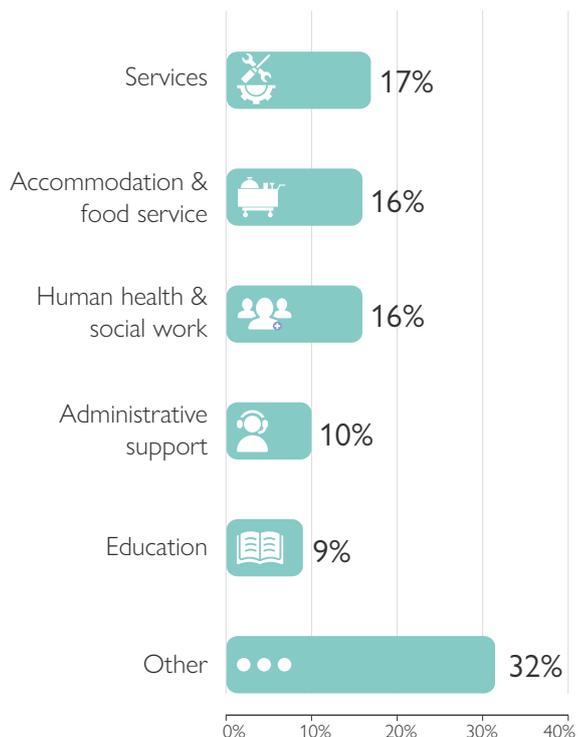

Table 8. Employment status by time in the Republic of Moldova, 2023 (%) n= 577

| TIME IN THE REPUBLIC OF MOLDOVA	EMPLOYED	UNEMPLOYED, LOOKING FOR JOB	DAILY WORKER	SELF-EMPLOYED	TOTAL
Less than 30 days	8%	22%	14%	17%	15%
1-6 months	11%	6%	10%	13%	8%
7-12 months	25%	21%	21%	7%	22%
13-18 months	36%	18%	29%	13%	28%
19-24 months	20%	33%	26%	50%	27%

One out of six female respondents (17%) in the Republic of Moldova worked in services, followed by 16 per cent in accommodation and food service, 16 per cent in human health and social work, 10 per cent in administrative support, and 9 per cent in education. Among male respondents, one out of

five (22%) worked in construction, followed by 19 per cent in transportation and storage, 11 per cent in wholesale and retail, 7 per cent in administrative support and 7 per cent in information and communication.

Figure 25: Top five employment sectors among Ukrainian women in the Republic of Moldova (%) n=227

Sector	%
Services	17%
Accommodation & food service	16%
Human health & social work	16%
Administrative support	10%
Education	9%
Other	32%

Figure 26: Top five employment sectors among Ukrainian men in the Republic of Moldova (%) n= 27

| Sector	%
Construction	22%
Transportation and storage	19%
Wholesale and retail	11%
Administrative support	7%
Information & communication	7%
Other	34%
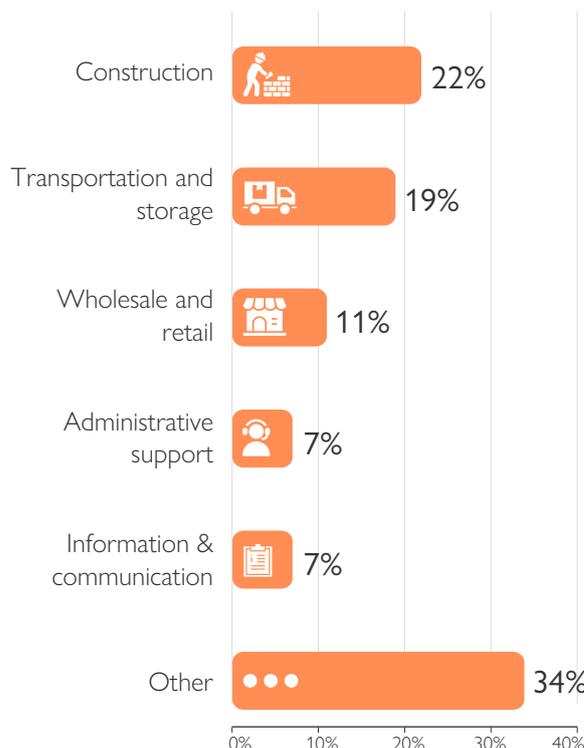
ROMANIA

Among the Ukrainian respondents surveyed in Romania in 2023, 67 per cent intended to stay in Romania and were of working age. The below analysis focuses on this group.

A larger proportion were active in the labour market in Ukraine before displacement compared to the proportion active in Romania in 2023 (including those who were unemployed and searching for work). Almost three out of five (59%) respondents were active in the labour market in Ukraine before displacement, two out of five (40%) were inactive, and the pre-displacement working status of 1 per cent was unknown. In 2023, 48 per cent of respondents were active in the labour market in Romania, 41 per cent were inactive, and the working status of 11 per cent was not available.

Among those who were active in the labour market, 43 per cent were employed, 46 per cent were unemployed and looking for work, 6 per cent engaged in daily work, and 5 per cent were self-employed.

Figure 27: Activity status before and after displacement (%), n=3,105

Status	In Ukraine	In Romania
Active	59%	48%
Inactive	40%	41%
N/A	1%	11%
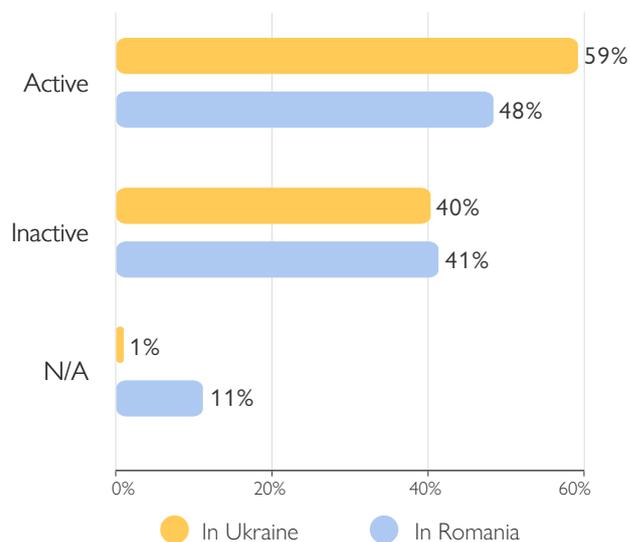
Just two out of five female respondents (42%) were employed, which was slighter lower than the 46 per cent of men who were employed in Romania in 2023.

Among those who were active in the labour market in Romania in 2023, the largest share (33%) of unemployed respondents seeking work had been in the country for less than one month. Among those who were employed, the largest proportion had been in the country for seven months to one year. Almost two out of five (39%) of economically active respondents who were self-employed had also been in the country between seven months and one year. The largest proportion of daily workers had been in Romania between one and six months.

Figure 28: Employment status among those who were active in the labour market in Romania, 2023 (%) n=1,486
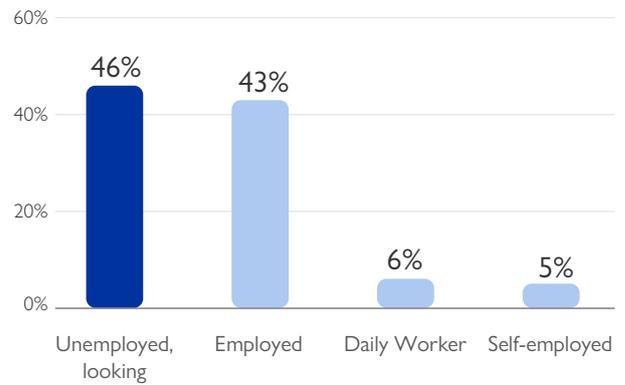

Table 9. Employment status by time in Romania, 2023 (%) n=1,486

| TIME IN ROMANIA	UNEMPLOYED, LOOKING FOR JOB	EMPLOYED	DAILY WORKER	SELF-EMPLOYED	TOTAL
Less than 30 days	33%	12%	17%	9%	22%
1-6 months	24%	17%	31%	26%	22%
7-12 months	22%	32%	26%	39%	27%
13-18 months	14%	25%	18%	26%	20%
19-24 months	7%	13%	8%	0%	9%
More than 2 years	0%	1%	0%	0%	0%

Almost one-fourth (24%) of surveyed individuals in Romania were working in education, followed by 16 per cent in services, 8 per cent in information and communication, 8 per cent in international organizations, and 7 per cent in wholesale and

retail. Among the men, half (50%) worked in transportation and storage, followed by 13 per cent in information and communication, 6 per cent in construction, 3 per cent in wholesale and retail, and 2 per cent in services.

Figure 29: Top five employment sectors among Ukrainian women in Romania (%) n=463
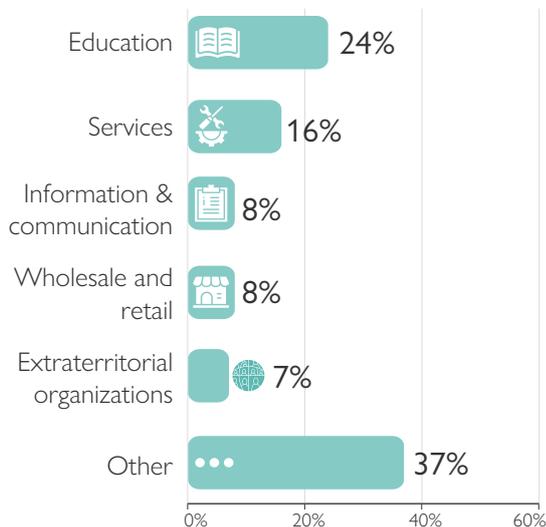
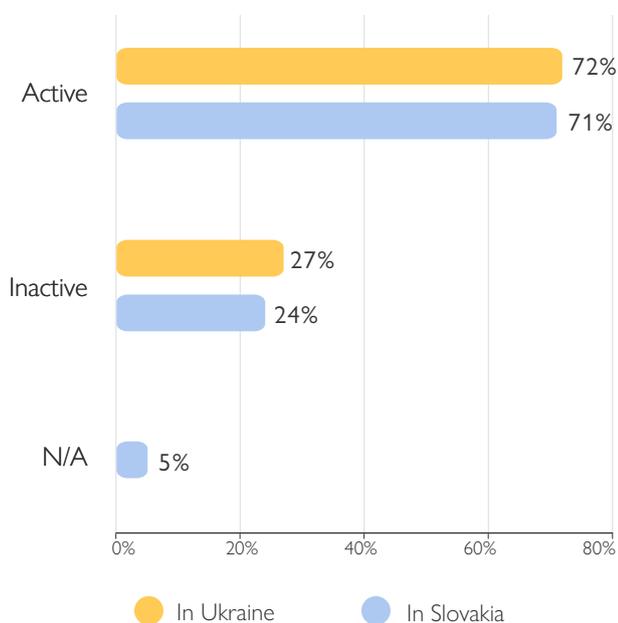**Figure 30:** Top five employment sectors among Ukrainian men in Romania (%) n=175
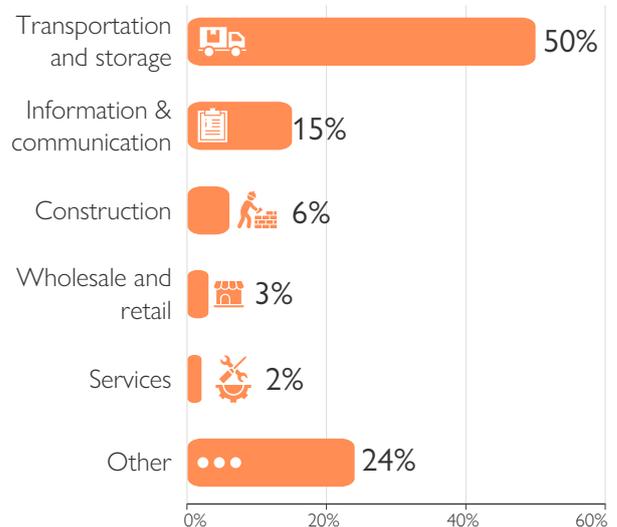
SLOVAKIA

Among the Ukrainian respondents surveyed in Slovakia in 2023, over four out of five (83%) intended to stay in the country and were of working age. The below analysis focuses on this group.

Almost the same proportion of surveyed Ukrainians were active in the labour market Slovakia in 2023 as were active in Ukraine before displacement (including those who were unemployed and looking for work). Before displacement, 72 per cent of respondents were active in the labour market in Ukraine and 27 per cent were inactive. In Slovakia, 71 per cent of surveyed individuals were active in the labour market in 2023. Almost one-fourth (24%) were inactive and the status of 5 per cent was unknown.

Among the active, just over half (53%) were employed, 37 per cent were unemployed and searching for work, 6 per cent were self-employed, and 5 per cent engaged in daily work. A slightly smaller proportion of women were employed (52%) compared to men (55%).

Among those who were active in the labour market in Slovakia in 2023, almost one-third (31%) of those who were employed had been in the country between 13 and 18 months, along with over one-third (37%) of daily workers. Almost three out of ten (29%) of those who were unemployed and looking for work had been in the country for less than one month. Just over half of respondents who were self-employed had been in Slovakia for more than two years.

Figure 31: Activity status before and after displacement (%), n=1,982

Figure 32: Employment status among those who were active in the labour market in Slovakia, 2023 (%) n=351
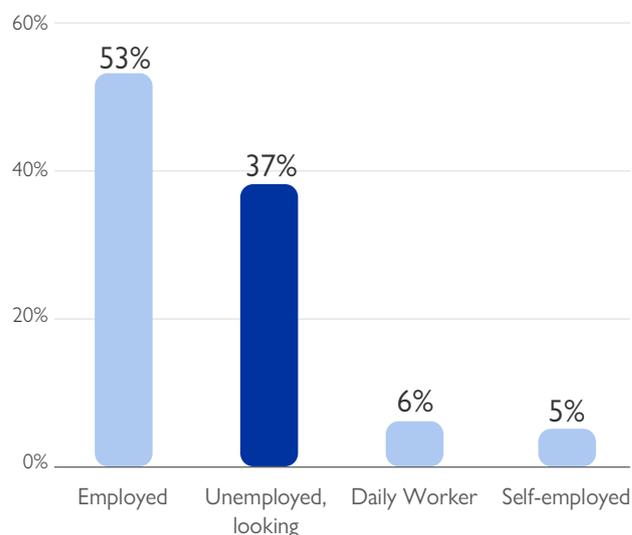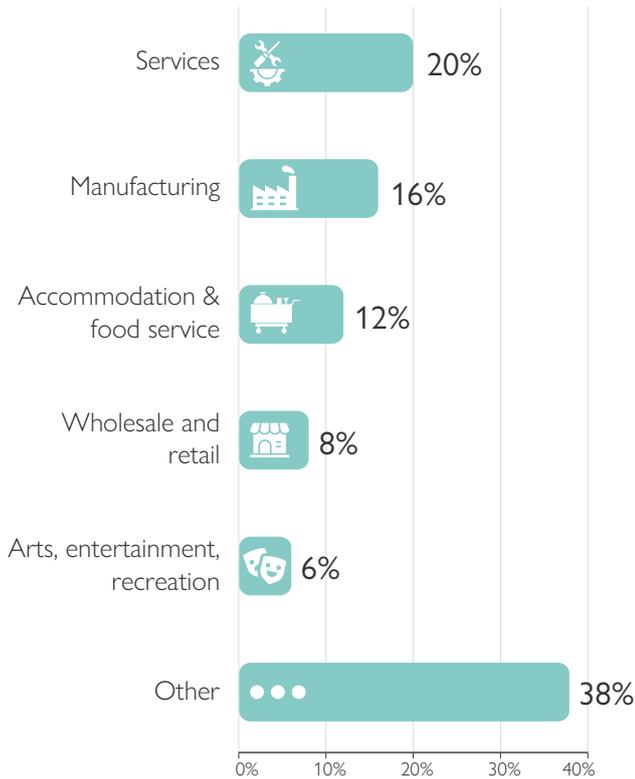

Table 10. Employment status by time in Slovakia, 2023 (%) n=1,408

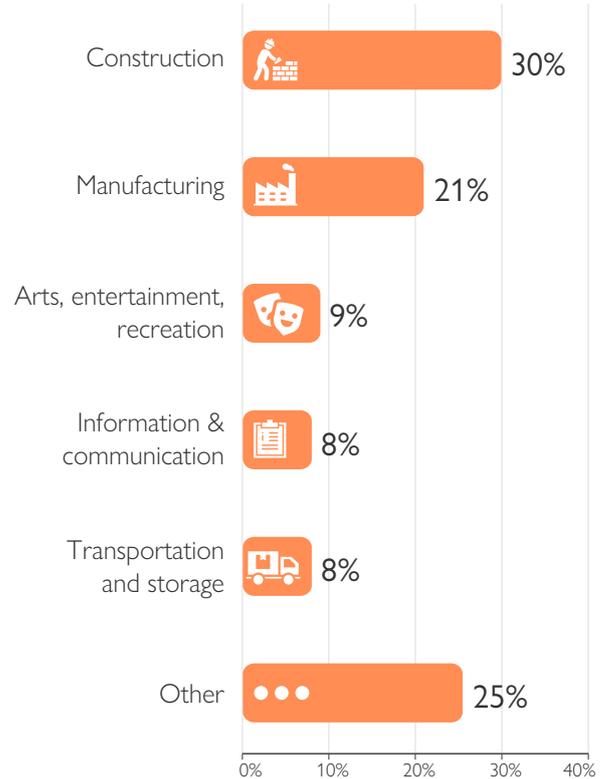| TIME IN SLOVAKIA	EMPLOYED	UNEMPLOYED, LOOKING	SELF-EMPLOYED	DAILY WORKER	TOTAL
Less than 30 days	6%	29%	5%	4%	14%
1-6 months	11%	15%	8%	13%	12%
7-12 months	24%	20%	4%	22%	21%
13-18 months	31%	24%	24%	37%	28%
19-24 months	22%	12%	8%	21%	17%
More than 2 years	6%	0%	51%	3%	8%

Among those who were employed in Slovakia, two out of five (42%) got their job through friends, 18 per cent through a job portal, 15 per cent through an agency, and the remaining quarter got it through other means, such as social media. One out of five (20%) women in Slovakia worked in services, followed by 16 per cent in manufacturing, 12 per cent in accommodation

and food services, 8 per cent in wholesale and retail, and 6 per cent in arts, entertainment, and recreation. Among the men, half (50%) worked in transportation and storage, followed by 15 per cent in information and communication, 6 per cent in construction, 3 per cent in wholesale and retail, and 2 per cent in services.

Figure 33: Top five employment sectors among Ukrainian women in Slovakia (%) n=544

Sector	%
Services	20%
Manufacturing	16%
Accommodation & food service	12%
Wholesale and retail	8%
Arts, entertainment, recreation	6%
Other	38%

Figure 34: Top five employment sectors among Ukrainian men in Slovakia (%) n=203

Sector	%
Construction	30%
Manufacturing	21%
Arts, entertainment, recreation	9%
Information & communication	8%
Transportation and storage	8%
Other	25%

An IOM staff surveys a Ukrainian woman on her needs in order for IOM to provide support at a reception center in Przemyśl, Poland. © IOM 2023

THE BALTICS

ESTONIA

A vast majority (89%) of respondents in Estonia in 2023 expressed an intention to stay in the country. Among those, a slightly smaller proportion were active in the labour market in Ukraine before displacement compared to the proportion that was active in Estonia.

Seventy-seven per cent were active in Ukraine before displacement and 23 per cent were inactive. In Estonia in 2023, 83 per cent of those who intended to stay were active in the labour market and 14 per cent were inactive (the working status of 2 per cent was unavailable).

Among those who were active in the labour market in the host country in 2023, 69 per cent were employed, 26 per cent were unemployed and searching for work, 3 per cent engaged in daily work, and 2 per cent were employed. Women were employed at a lower rate (65%) compared to men (81%).

Figure 35: Activity status before and after displacement (%), n=2,106
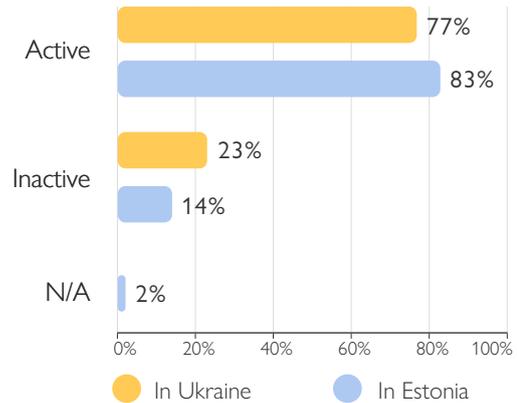
LATVIA

Only 13 per cent of respondents in 2023 in Latvia intended to stay in the country. This may be due the low number of respondents or that Ukrainians cross from Latvia into the Russian Federation to reach areas of Ukraine currently not under the control of the Government of Ukraine. A slightly larger proportion of respondents were active in the labour market in Ukraine before displacement than the proportion active in Latvia in 2023. Seven out of ten (70%) respondents were active in Ukraine before displacement and 25 per cent were inactive. In 2023, 65 per cent of respondents in Latvia were active and 22 per cent were inactive. Among those who were economically active in Latvia in 2023, almost half (48%) were employed, just under one third (32%) were unemployed and searching for work, 12 per cent were self-employed and 9 per cent were daily workers. Women were employed at a higher rate (34%) compared to men (28%).

Figure 36: Activity status before and after displacement (%), n=155
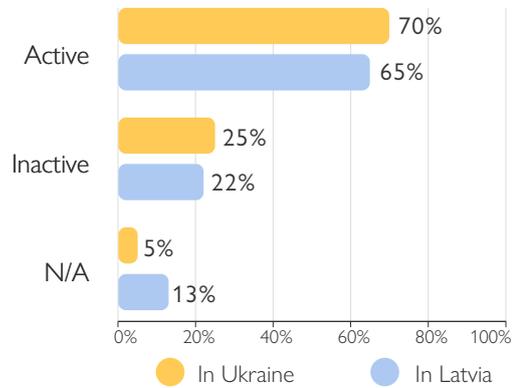
LITHUANIA

Respondents who intended to stay and of working age represented four out of five (81%) respondents surveyed in Lithuania in 2023. Among them, two-thirds (67%) were active in the labour market in Ukraine before displacement and 32 per cent were inactive (the pre-displacement working status of 1% was unavailable). In Lithuania in 2023, 66 per cent of these respondents were active and 32 per cent were inactive (the working status of 2% of respondents was unknown. Among those who were active in Lithuania, almost three out of five (58%) were employed, over one-third (37%) were unemployed, 4 per cent were self-employed, and 1 per cent engaged in daily work. Women and men had similar rates of employment (58% and 60% respectively).

**Figure 37:** Activity status before and after displacement (%), n=1,345
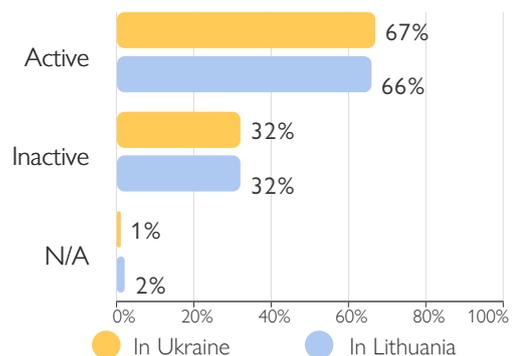
OTHER COUNTRIES IN EUROPE

BULGARIA

Respondents who intended to stay in the country and who were of working age represented 58 per cent of the Ukrainian respondents in Bulgaria in 2023.

The proportion of respondents who were active in the labour market in Ukraine prior to displacement was larger than the proportion who were active in the country in 2023. Among them, 64 per cent were active before displacement and 34 per cent were inactive (the pre-displacement employment status was unavailable for 3% of respondents). In 2023 in Bulgaria, 49 per cent were active, while 44 per cent were inactive, and the status of 7 per cent of respondents was unknown. Among those who were active in Bulgaria, 46 per cent were employed, 38 per cent were unemployed, 10 per cent were daily workers, and 6 per cent were self-employed. The proportion of women employed was lower than that of men (44% and 57% respectively).

**Figure 38:** Activity status before and after displacement (%), n=1,536
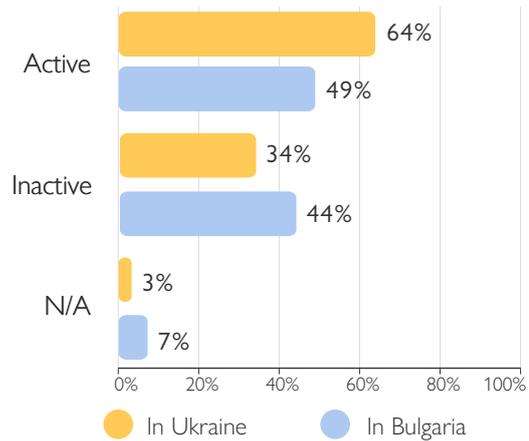
CZECHIA

Respondents who intended to stay in the country and who were of working age represented 73 per cent of the Ukrainian respondents in Czechia in 2023.

Among those, the proportion who were active in the labour market in Czechia was slightly higher than the proportion who were active in Ukraine before displacement. Before displacement, 74 per cent of respondents were active in Ukraine and 26 per cent were inactive. In Czechia in 2023, 82 per cent of respondents were active, 16 per cent were inactive, and the employment status of 2 per cent was not available. Among those who were active in Czechia, 53 per cent were employed, 29 per cent were unemployed, 13 per cent were daily workers, and 5 per cent were self-employed. The proportion of women employed was lower than that of men (49% and 67% respectively).

Figure 39: Activity status before and after displacement (%), n=3,670
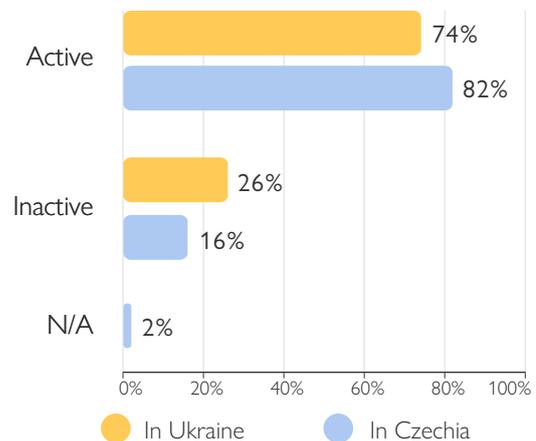
METHODOLOGY

This report is based on a survey on displacement patterns, needs and intentions conducted by IOM's Displacement Tracking Matrix (DTM) in the 11 countries included in the Regional Response Plan for Ukraine in 2023:

- 6 countries neighbouring Ukraine – Belarus, Hungary, Poland, the Republic of Moldova, Romania, and Slovakia

- 5 additional countries in Europe, particularly impacted by the arrivals of refugees from Ukraine since the start of the large-scale invasion in February 2022 – Bulgaria, Czechia, Estonia, Latvia and Lithuania.

The analysis presented in this report is based on data collected between January and December 2023 through a network of more than 150 enumerators, with various timelines and specific survey tools adapted to the country context. Nevertheless, the sampling approach, main definitions and features of the survey tool make country-level datasets comparable.

Face-to-face surveys were conducted by trained enumerators with adult refugees from Ukraine and other TCNs (18 years of age and above). Prior to the start of the survey, all enumerators were trained by IOM on DTM standards, the use of Kobo application, IOM approach to migrants' protection and assistance, the ethics of data collection and the provision of information and referral mechanisms in place.

Respondents were approached in a simple random sample by enumerators at selected entry, exit, transit points and accommodation centres. In border crossing point areas, people both entering and exiting by car, by bus, by foot and by train were interviewed. The survey was anonymous and voluntary. Surveys were administered only if consent from the respondent was given. The respondent could stop the survey at any time.

The questionnaire was available in Ukrainian, Russian, English and Romanian language. The preferred language was determined by the interviewee. All responses were checked for any systematic issues by enumerator and this process did not identify any problems. Only fully completed surveys were taken in account for this report.

COUNTRY-LEVEL IMPLEMENTATION AND LIMITATIONS

The sampling framework was not based on verified figures of refugees from Ukraine and TCNs entering through the various border crossing points (BCPs) or staying in the various regions (counties, districts, rayons) across each of the country where surveys were conducted. This is due to the limited availability of comparable baseline information across countries. The geographic spread of enumerators deployed and locations targeted captures most of the key arrival, transit and destination points. Whilst results cannot be deemed representative, the internal consistency within the data in each country and at the regional level suggests that the findings of the current sampling framework have practical value.

Whilst every attempt was made to capture all types of profiles of refugees from Ukraine arriving and residing in the covered countries, the operational reality of fieldwork was confronted with different levels of accessibility of different types of entry, transit and stay locations and the different availability of possible target individuals to comfortably spend about 20 minutes responding to the questionnaire depending on a mix of personal conditions. Other factors also play a role which are more related to specific time of the day, period of the year and conditions at a specific location such as organizational changes by national authorities or organizations managing covered transit and reception locations, weather conditions, festive periods, etc.

IOM REGIONAL OFFICE

FOR SOUTH-EASTERN EUROPE, EASTERN EUROPE AND CENTRAL ASIA

🏠 rovienna.iom.int

✉ roviennadataresearch
-newsletter@iom.int

Dampfschiffstrasse
4/10-11, 1030
Vienna, Austria

f 𝕏 📷

@iomrovienna

DTM

Displacement Tracking Matrix (DTM) is a system to track and monitor displacement and population mobility. The survey form was designed to capture the main displacement patterns – origin country and region – for refugees of any nationality fleeing from Ukraine because of the war. It captures the demographic profiles of respondents and of the group they are travelling with, if any; it asks about intentions relative to the intended destinations and prospects of permanence abroad or return; it gathers information regarding a set of main needs that the respondents expressed as more pressing at the moment of the interview.

Since the onset of the war in Ukraine, several IOM's DTM tools were deployed in countries neighbouring Ukraine and in other countries particularly impacted by the new arrivals of migrants and refugees from Ukraine.

For more information, please consult: https://dtm.iom.int/responses/ukraine-response

DTM is part of IOM's Global Data Institute.