ESTONIA

LABOUR MARKET INTEGRATION OF REFUGEES FROM UKRAINE

JANUARY - MARCH 2024

IOM UN MIGRATION

GLOBAL DATA INSTITUTE DISPLACEMENT TRACKING MATRIX

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Cover photo: IOM staff finalizing agreements for the donation of winterization products to support the people in Ukraine, Dnipro. © IOM 2023

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KEY FINDINGS

Out of the 958 Ukrainian respondents, 68 per cent were women and 32 per cent were men. Among this population, 85 per cent were active, which means they were engaged in the labour force by either being employed at the time of interview or unemployed and seeking employment. However, 15 per cent were inactive. This includes individuals who are unemployed and not looking for a job, as well as those retired, on parental leave, and students.

Within the active population, 72 per cent are employed and 28 per cent are unemployed and looking for a job. Among those who are inactive, 22 per cent are on parental leave, 26 per cent are retirees, 27 per cent are students and the remaining 14 per cent are unemployed and not seeking a job.

The majority of Ukrainian refugees depend on their income (62%) as the main source for daily expenses. However, over two-fifths (42%) of respondents rely on the authorities' support, 33 per cent on familial support and 11 per on their savings. A very small proportion of respondents (9%) still receive welfare benefits from Ukraine.

Almost a quarter of Ukrainian refugees (22%) did not attend any type of language classes for Estonian. Notably however, nearly half (46%) are attending language classes at schools, over one quarter have classes with migration authorities and 18 per cent are receiving online classes.

The majority of respondents have not received any remittances (83%). Seventeen per cent indicated that they received 20 to 2,000 euros. Among recipients, 43 per cent stated they have spent from 10 to 2,000 euros, whereas 57 per cent haven't spent any of their remittances.

Regarding entrepreneurship, many displaced Ukrainians are interested in opening their own business (29%). Only three per cent already own their own business and eight per cent are unsure of wanting to. A significant proportion (80%) are not interested in having their own business.

For the first time, IOM's DTM questioned respondents regarding workplace exploitation in Estonia, uncovering that 5 per cent of those surveyed had encountered some degree of labour exploitation.

ABOUT THE SURVEY

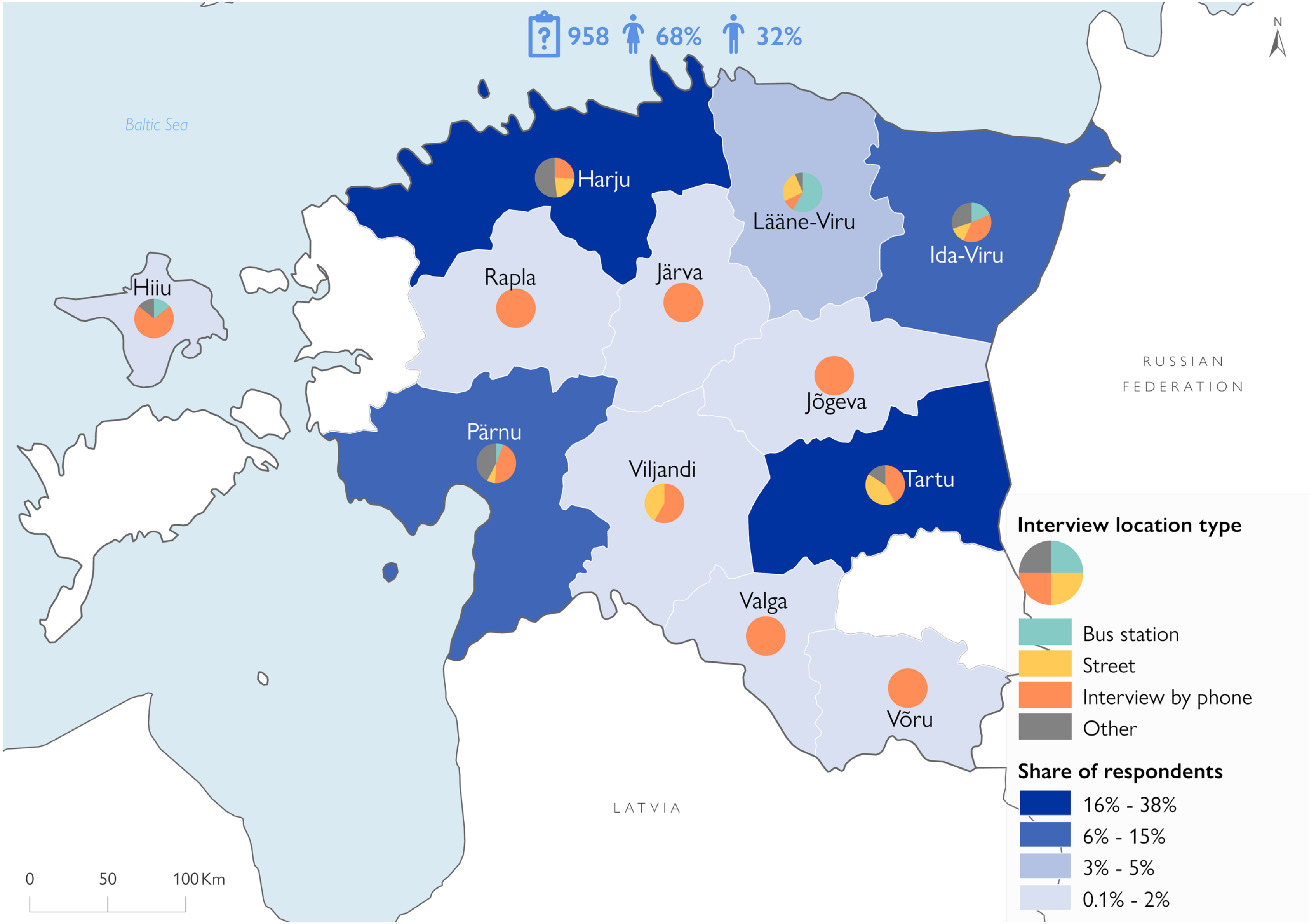
IOM's Displacement Tracking Matrix collected data through Surveys with Refugees in the Ukraine Response region from January to March 2024. In Estonia, they interviewed a total of 958 individuals.

This report explores different aspects of their economic integration, employment profiles, and prospects of the adult respondents, specifically those who have an intention to stay or have already established themselves in the country.

These individuals, also referred to as "intending to stay", are actively investing their human and social resources to fully integrate into the host community. The report offers insights into their involvement in the labour market and detailing their experiences, needs, and intentions concerning employment in Estonia for the duration of their displacement.

DTM survey with a refugee from Ukraine in Tallinn, Estonia. © IOM 2023

Overview: Number of surveys and locations of data collection in Estonia, January-March 2024



This map is for illustration purposes only. The boundaries and names shown, and the designations used on this map do not imply official endorsement or acceptance by IOM.

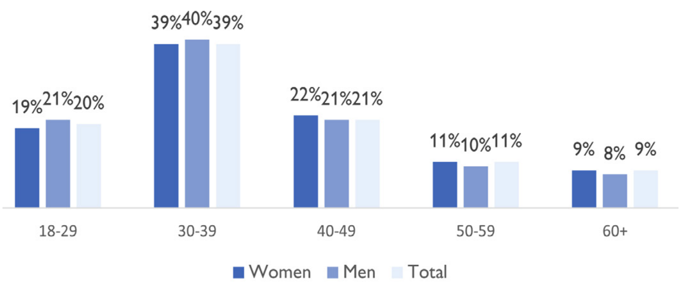
SOCIO-DEMOGRAPHIC PROFILE

GENDER & AGE

Among respondents who are intending to stay in Estonia for the foreseeable future (n=958), 68 per cent were women, while the remaining 32 per cent were men. The most represented age groups were between 30 and 39 years old (39%), followed by those between 40 and 49 years old (21%).

The average age for the sample was 40 years old. Among women, the largest age group represented was 30 to 39 year-olds (39%), followed 40- to 49-year-olds (22%). Among men, the most represented age groups were 30 to 39 years old (40%), followed by 40- to 49-year-olds (21%).

Figure 1. Respondents by age and gender (%) n=958

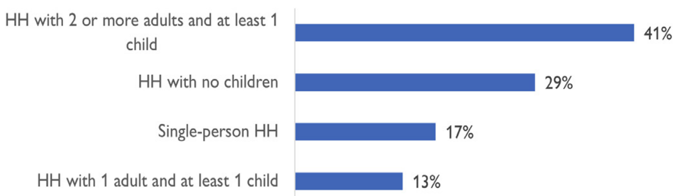


HOUSEHOLD SIZE & TYPE

The most common household sizes were those of three and two persons (31% and 30% respectively). Fewer participants were members of single-person households (16%) and four-person households (17%). Five-person and six-person households were the least common (5% and 1% respectively).

Forty-one per cent of all respondents (n=958) were part of households with two or more adults and at least one child. The second most common type was a household with no children (29%), followed by single-person households (17%), and households with one adult and at least one child (13%). In the case of households with one adult and at least one child, almost all the respondents were women.

Figure 2. Respondents by household type (%) n=958

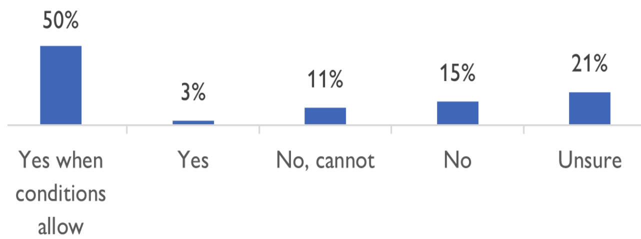


MOVEMENT INTENTIONS

Four per cent of respondents had intentions to move outside of Estonia within the next six months, while the share of those firmly intending to stay was as high as 89 per cent. Seven per cent of participants were unsure about their plans.

Twenty-six per cent either had no desire to return to their home country (15%) or could not return (11%). Over a half (53%) expressed a willingness to return, with three per cent ready to do so unconditionally and 50 per cent awaiting favorable conditions. The remaining 21 per cent of respondents were unsure about their plans.

Figure 3. Desire to return to the home country (%) n=958

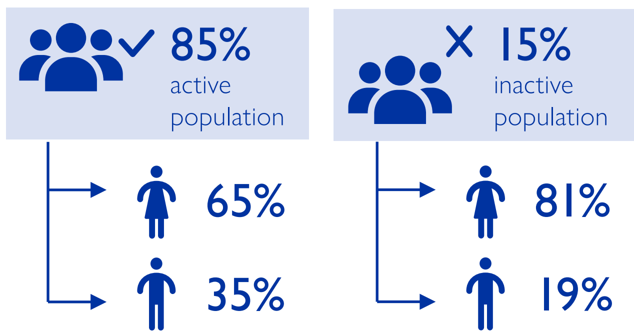


ACTIVE AND INACTIVE POPULATION

TRENDS AFTER DISPLACEMENT

Those intending to stay in Estonia participate in the local labour market more compared to when they were in Ukraine prior to displacement.

At the time of the interview, 85 per cent of respondents (n=958) were actively involved in the workforce (65% of women and 35% of men), whereas 15 per cent of respondents remained inactive (81% of women and 19% of men).



The highest proportion of active respondents was observed in the age group of 30- to 39-year-olds (43%), followed by the age group of 40- to 49-year-olds (25%). Meanwhile, individuals over 60 years and the 18 to 29 age group had the highest proportion of inactive individuals (41% and 33% respectively).

Within the active population (n=818), 72 per cent were in employment (63% employed, 6% self-employed, and 3% daily workers), whereas the remaining 28 per cent were unemployed and looking for a job. In addition, women were distinguished by a lower employment rate as compared to men.

Figure 4. Active and inactive population after displacement, by age (%) n=958

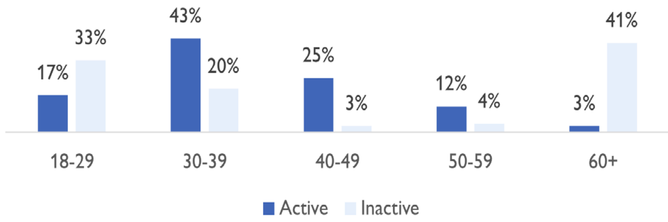


Figure 5. Employment status within active population after displacement (%) N=818

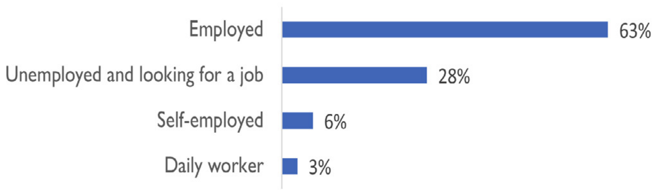
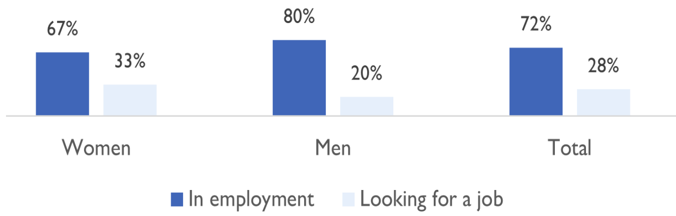


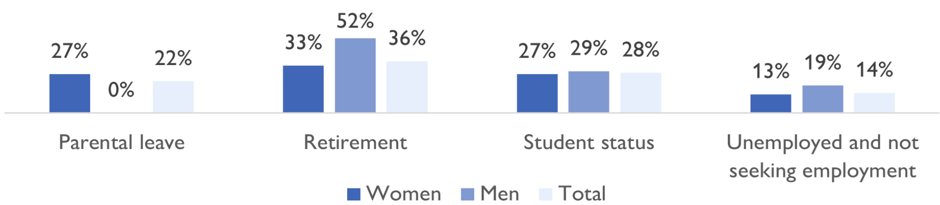
Figure 6. Employment status within active population after displacement by gender (%) n=818



The inactive population consists of individuals neither employed nor actively seeking employment. Among the respondents, 15 per cent belonged to the inactive population (n=140). This percentage included people on parental leave (22%), retirees (36%), students (27%), and those who were unemployed without actively looking for a job (14%).

Notably, 27 per cent per cent of women were on maternity leave, while none of the men were on paternity leave. Conversely, more men were unemployed and not seeking employment (13% versus 19%). Male respondents were also more likely to be in retirement (52%) compared to women (33%). Similarly, the proportion of individuals with the student status was higher among men (29% versus 27%).

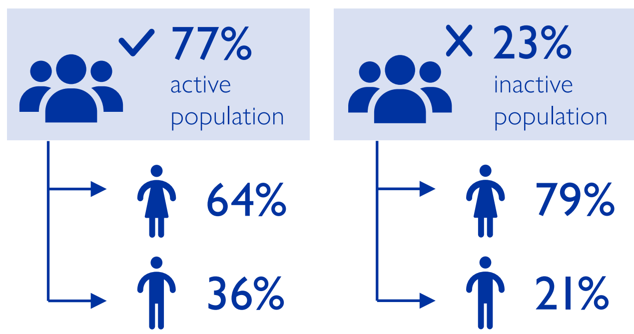
Figure 7: Status within inactive population (%) n=140



TRENDS BEFORE DISPLACEMENT

Prior to leaving Ukraine, 77 per cent of all respondents (n=958) were actively participating in the labour market, which is lower than the current rate of participation among respondents in Estonia (85%). The other 23 per cent were not actively involved in the labour market. Similar to the situation after the displacement, there was a gender gap before respondents left Ukraine, as 64 per cent of women versus 36 per cent of women were active.

Eighty-six per cent of those surveyed within the active population were employed (72% as regular employees, 13% as self-employed, and 1% as daily workers), while fourteen per cent were actively seeking employment.



Within the inactive population, reasons for not participating in the labour market included parental leave (35%), retirement (31%), student status (30%), and individuals not actively seeking employment (4%).

Prior to displacement, a larger percentage of women were working compared to men (91% of women compared to 78% of men). Similar to after being displaced, among those inactive, only women were on parental leave (44%). On the other hand, more men than women were unemployed and not looking for work before they had to leave Ukraine (7% versus 3%). Furthermore, more men were students and retirees compared to women (59% versus 23% and 35% versus 30% respectively).

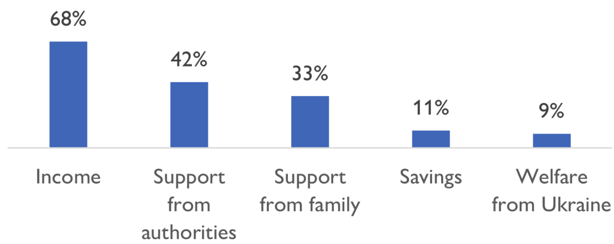
EXPENSES AND REMITTANCES

The respondents (n=958) relied on various means for covering their household's daily expenses. Personal income was specified by 68 per cent of respondents, while 42 per cent referred to support from the authorities. Around a third mentioned support from family (33%), 11 per cent depended on savings, and 9 per cent used their welfare benefits from Ukraine.

The majority of respondents (83%) did not receive any funds from the country of origin, whereas 17 per cent were given remittances up to 2,000 euros.

The percentage of survey participants (n=950) who spent their funds in the country of origin was 43 per cent. For 94 per cent, it was a recurring monthly expense (n=406), and for the remaining 6 per cent it was a one-time transaction. Over one half (57%) did not cover any expenses in Ukraine.

Figure 8. Top sources for covering daily expenses (%) n=958



Multiple answers possible

Figure 9. Funds received from the country of origin (%) n=953

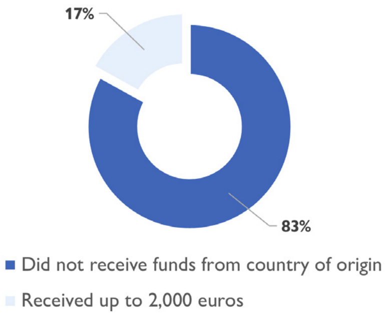
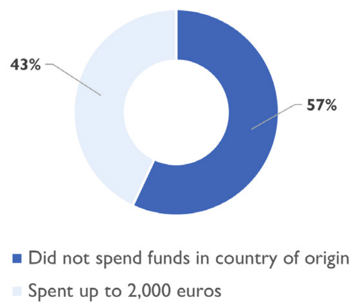


Figure 10. Funds spent in the country of origin (%) n=950



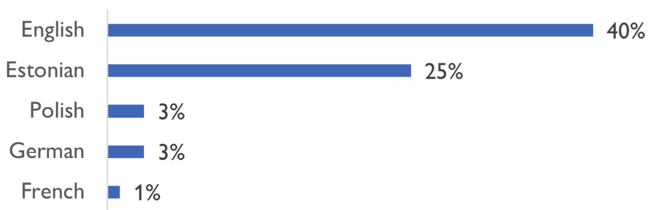
Economic integration enablers and barriers

KNOWLEDGE OF LANGUAGES

More than a half of respondents (n=958) used Ukrainian as the main language of communication at home (52%), while 47 per cent used Russian, and the remaining one per cent spoke Belarusian, English, and Hungarian. Survey participants also had the knowledge of other languages, the most common being English (40%), Estonian (25%) as well as Polish (3%), German (3%), and French (1%).

The respondents (n=958) were asked to evaluate their Estonian language reading, speaking, writing, and listening skills. One third reported having moderately good reading skills (32%), only six per cent could read well or very well. Notably, nearly 60 per cent could not read well or at all, and two per cent could not assess their reading skills. Similarly, almost one third indicated moderately good speaking skills (27%), four per cent spoke well or very well, the majority could not speak well or at all (67%), and two per cent did not know how to answer.

Figure 11. Top other languages spoken (%) n=958



Multiple answers possible

Figure 12. Estonian language reading skills (%) n=958

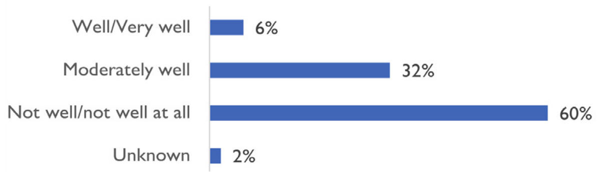
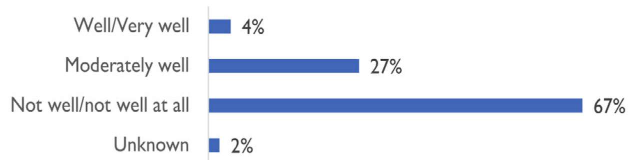


Figure 13. Estonian language speaking skills (%) n=958



In the case of writing skills, the share of those who could not write well or at all was also high (64%), while 29 per cent could write moderately well, five per cent — well or very well, and two per cent could not estimate it. Lastly, over one third had moderately good listening skills (31%), five per cent — good or very good, while the skills of 62 per cent were not good or not good at all, and two per cent could not answer.

Figure 14. Estonian language writing skills (%) n=958

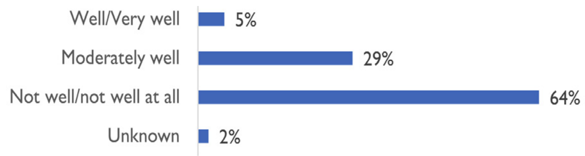
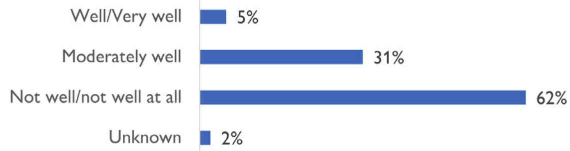


Figure 15. Estonian language listening skills (%) n=958



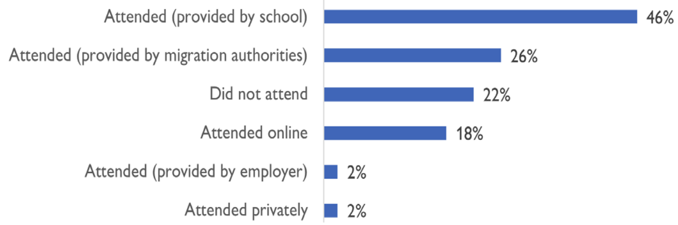
ESTONIAN LANGUAGE COURSES

Most respondents attended Estonian language courses provided by schools (41%), followed by migration authorities (29%), private tutors (1%), and employers (1%). Twenty-four per cent did not attend any language courses, and 29 per cent attended them online.

Ninety-seven per cent of respondents' (n=500) courses were free of charge, whereas three per cent participated in paid courses.

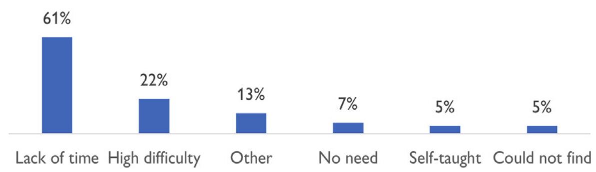
The participants who had not taken any Estonian language courses (n=154) had varying reasons for not attending, including lack of time (58%), Estonian being too difficult to learn (25%), and other, unspecified reasons (8%). Some respondents chose to learn by themselves (12%) or could not find any courses (11%).

Figure 16. Attending an Estonian language course (%) n=958



Multiple answers possible

Figure 17. Reasons for not attending an Estonian language course (%) n=210

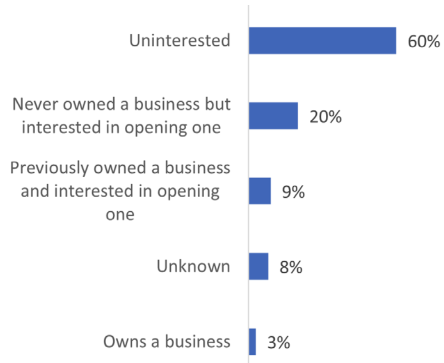


Multiple answers possible

ENTREPRENEURIAL AND PERSONAL DEVELOPMENT

While 60 per cent neither had a business nor were interested in opening one, roughly over one third of respondents (32%) expressed positive entrepreneurial attitudes. Within this group, very few already had a business at the time of the interview (3%), nine per cent had a business in their country of origin and would like to open one in Estonia, and 20 per cent never had a business but were interested in starting one.

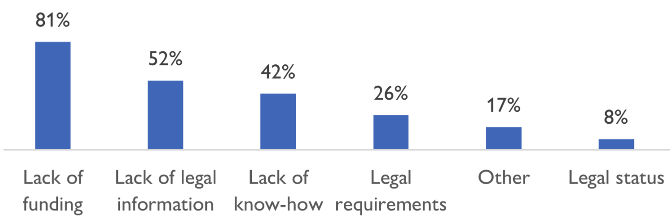
Figure 18. Owning a business or interest in starting one (%) n=958



For 81 per cent of respondents within the group interested in opening a business (n=272), the lack of funding was the most significant obstacle. Survey participants also lacked sufficient legal information (52%), knowledge (42%), legal requirements (26%), and legal status (8%). Seventeen per cent had unspecified barriers to opening a business.

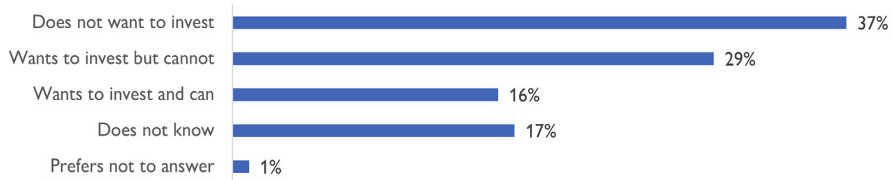
Almost one half (45%) of all respondents (n=958) were willing to invest in their skills development through the means of training, learning, coaching, or other forms of personal development. Nevertheless, within this group, only 16 per cent had sufficient funds for such an investment. Meanwhile, 37 per cent did not want to invest to develop their skills, 17 per cent were unsure, and one per cent preferred not to answer. The amounts that interviewees (n=154) were willing to invest ranged from 50 to 30,000 euros, with 77 per cent of participants specifying from 100 to 1,000 euros.

Figure 19. Obstacles to open a business (%) n=272



Multiple answers possible

Figure 20. Wllingness to invest in the development of skills (%) n=958



COUNTER-TRAFFICKING: EXPLOITATION IN THE WORKPLACE

Five per cent of all respondents (n=958) reported working or performing other activities without receiving the expected payment, while the rest 95 per cent did not encounter such situations.

One per cent of respondents indicated that they were forced to perform work or other activities against their will. Among the seven individuals who cited such occurrences, they specified these incidents predominantly within the construction and culinary sectors. Ninety-nine percent did not report experiencing coerced labour.

Ninety-nine per cent of respondents mentioned they have not experienced any form of physical violence, whereas one per cent preferred not to answer.

Figure 21. Exploitation in the workplace (%) n=958

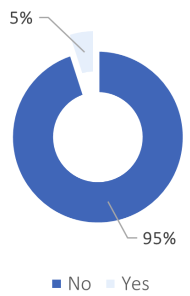
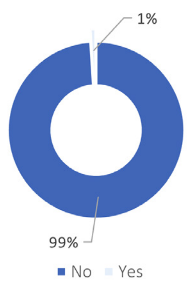


Figure 22. Incidents of forced labour (%) n=958



DTM survey with a refugee from Ukraine in Tallinn, Estonia. © IOM 2024

METHODOLOGY

IOM's Displacement Tracking Matrix (DTM) is a system to track and monitor displacement and population mobility. It is designed to regularly and systematically capture, process and disseminate information to provide a better understanding of the movements and evolving needs of displaced populations, whether on site or en route.

Since April 2022, IOM Displacement Tracking Matrix has been regularly surveying individuals who are residing in the eleven countries included in the Regional Refugee Response Plan for Ukraine. The aim of the survey is to improve the understanding of their profiles, displacement patterns, intentions and needs. The survey is deployed in 6 countries neighbouring Ukraine – Belarus, Hungary, Poland, the Republic of Moldova, Romania, and Slovakia, and other 5 countries in Europe, particularly impacted by the arrivals of refugees from Ukraine, including Bulgaria, Czechia, Estonia, Latvia and Lithuania.

Face-to-face surveys were conducted by six trained enumerators, with adult refugees from Ukraine (18+ years-old). Surveys were collected by on the streets, and at selected locations (cultural and collective centres, shopping malls, bus stations, NGO premises, dormitories, and the Consulate of Ukraine) in seven counties of Estonia. The survey is anonymous and voluntary, administered after obtaining consent from the respondent. Respondents can stop the survey at any time. In Estonia, the questionnaire is available in English, Ukrainian and Russian, and the preferred language is determined by the interviewee. Only fully completed surveys are considered for analysis.

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 mechanism in place.

About the Survey

Aim

To improve the understanding of the profiles of Ukrainian refugees who have already settled or intend to settle in Estonia, specifically their economic integration, labour market participation as well as enablers and barriers to employment.

Target population

The report focuses on economic and labour market participation and integration of Ukrainian refugees who have already settled or intend to settle in Estonia.

Location and execution

Face-to-face surveys were conducted by six trained enumerators stationed at selected locations in seven regions of Estonia. Surveys are conducted in English, Ukrainian and Russian with the help of a mobile application.

Regional data collection and analysis

The survey is deployed in 11 countries: 6 neighboring countries (Belarus, Hungary, Poland, the Republic of Moldova, Romania, Slovakia), and 5 other countries (Bulgaria, Czechia, Estonia, Latvia and Lithuania) impacted by the arrival of refugees from Ukraine.

LIMITATIONS

The sampling framework was not based on verified figures of refugees from Ukraine entering through all land border points or staying in the various regions where the surveys are conducted, due to the lack of baseline information.

The geographic spread of enumerators deployed captures seven of 15 counties in Estonia. Whilst the overall results cannot be deemed as representative, the internal consistency of data collection in each country and at the regional level suggests that the current sampling framework produces findings of practical value.

While every attempt was made to capture all types of locations, the operational reality of fieldwork was confronted with different levels of accessibility of transit and stay locations, including the different availability of possible target individuals to comfortably spend 10-20 minutes responding to the questionnaire depending on a mix of personal conditions. Other factors more related to the conditions at a specific location and period, such as organizational changes in the entry and transit areas from national authorities, or weather conditions, also play a role.

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

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