UKRAINE RESPONSE

ESTONIA

LABOUR MARKET INTEGRATION OF REFUGEES FROM UKRAINE

APRIL - JUNE 2024

IOM UN MIGRATION | GLOBAL DATA INSTITUTE DISPLACEMENT TRACKING MATRIX

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Publisher

International Organization for Migration
Regional Office for South-Eastern Europe,
Eastern Europe and Central Asia
Dampfschiffstrasse 4/10-11, 1030 Vienna
Austria
+43 1 581 22 22
Website: https://rovienna.iom.int/
Contact: ROViennaDataResearch-Newsletter@iom.int

International Organization for Migration
Country Office in Estonia

Hobujaama str. 4
Tallinn, Estonia
+372 6 778 700
Website: https://estonia.iom.int/
Contact: iomtallinn@iom.int

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KEY FINDINGS

Among the 654 Ukrainian respondents, women constituted 66 per cent of the respondents, while men made up the remaining 34 per cent. Within this demographic, a significant 85 per cent were classified as active, indicating their participation in the labour force either through being employment or seeking employment. However, 15 per cent were inactive. This includes individuals that are unemployed and not looking for a job, as well as those retired, on parental leave, and students.

Within the active population, 77 per cent were employed and 23 per cent are unemployed and looking for a job. For those inactive, 31 per cent were on parental leave, 38 per cent were retirees, 20 per cent were students and the remaining 11 per cent were unemployed and not seeking a job.

The need for employment is the second priority need, with over a third of respondents citing it (36%). Other immediate needs include language courses (39%), financial support (29%), health services (22%), and education for adults (16%). Moreover, the lack of employment was also the biggest inclusion challenge, according to 44 per cent of respondents.

The majority of Ukrainian refugees depend on their income (81%) as the main source for daily expenses. However, over one half (55%) of respondents rely on the authorities' support, 15 per cent on familial support and 11 per cent on welfare benefits from Ukraine. A very small proportion of respondents (6%) also use their savings.

Almost a quarter of Ukrainian refugees (24%) did not attend any type of language classes for Estonian. Notably however, nearly half (41%) are attending language classes at schools, over one quarter have classes with migration authorities (29%) and 29 per cent are receiving online classes. In rare cases, the respondents had classes with private tutors (1%) and provided by employers (1%).

Regarding entrepreneurship, many displaced Ukrainians are interested in opening their own business (31%). Only three per cent already own a business, while eight per cent had a business in their country of origin, 20 per cent never owned one, and five per cent are unsure. A significant proportion of 64 per cent are not interested in starting their own business.

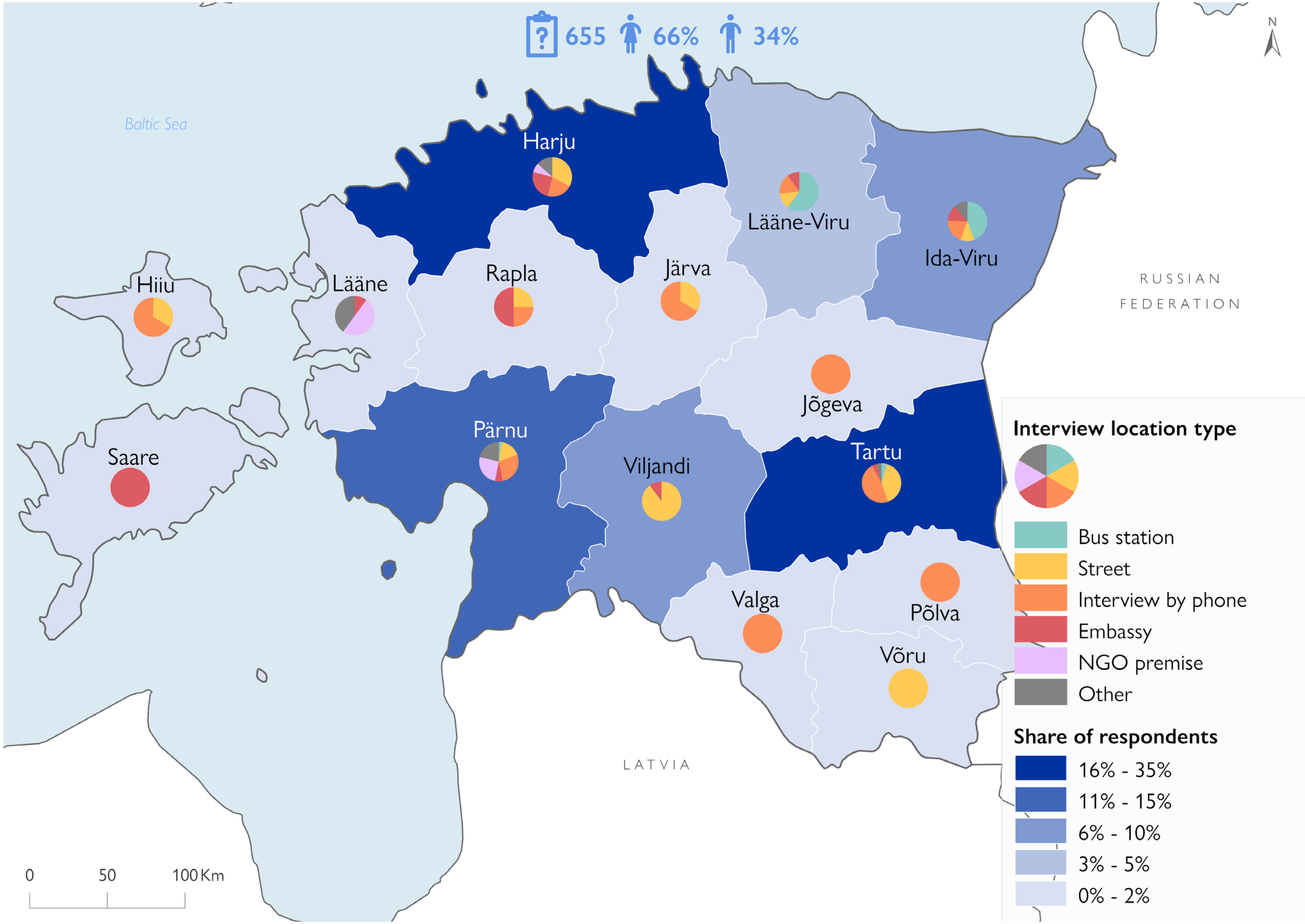
Respondents were also questioned regarding workplace exploitation in Estonia, uncovering that 6 per cent of those surveyed had encountered some degree of labour exploitation.

ABOUT THE SURVEY

IOM's Displacement Tracking Matrix (DTM) collected data through Surveys with Refugees in the Ukraine Response region from April to June 2024. In Estonia, they interviewed a total of 654 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 Tartu, Estonia. © IOM 2023

Overview: Number of surveys and locations of data collection in Estonia, April - June 2024



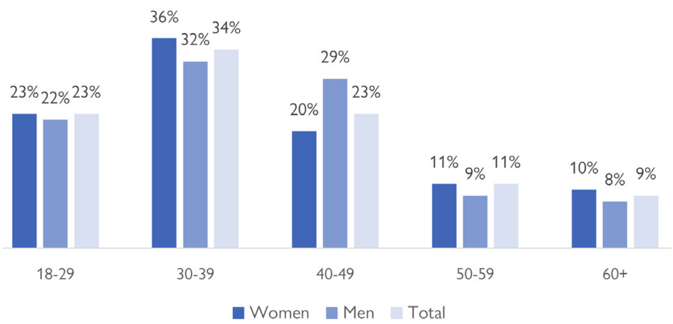
This map is for illustration purposes only. The boundaries and names shown, and the designations used on this map do not imply official endorsement or acceptance by IOM.

SOCIO-DEMOGRAPHIC PROFILE

GENDER AND AGE

Among respondents who are intending to stay in Estonia for the foreseeable future (n=654), 66 per cent were women, while the remaining 34 per cent were men. The most represented age group among both women and men was 30 to 39 years old (36% and 32% respectively), while 40 to 49 years old was the second most represented group among male respondents (29%). Among female respondents, the second most prominent group was 18 to 29 years old (23%).

Figure 1. Respondents by age and gender (%) n=654

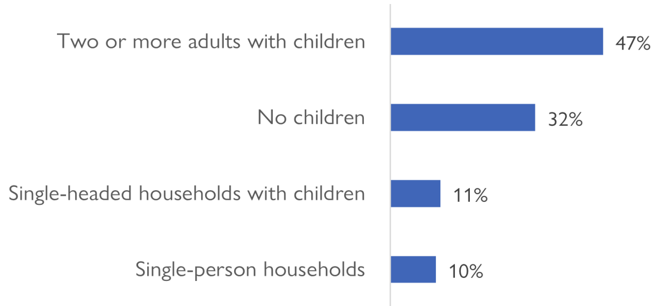


HOUSEHOLD SIZE AND TYPE

The most common household sizes were those of three and two persons (35% and 29% respectively). Fewer participants were members of four-person households (17%) and single-person households (11%). Households of five persons or more were the least common (8%).

Forty-seven per cent of all respondents (n=654) 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 (32%), followed by households with one adult and at least one child (11%), and single-person households (10%). In the case of households with one adult and at least one child, almost all the respondents were women (92%).

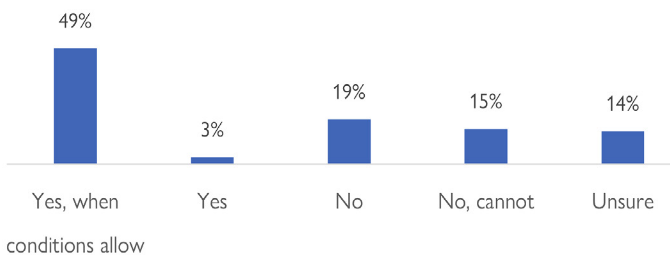
Figure 2. Respondents by household type (%) n=654



MOVEMENT INTENTIONS

Over half of respondents (52%) expressed their willingness to return, with 3 per cent ready to do so unconditionally and 49 per cent awaiting favorable conditions. Nineteen per cent either had no desire to return to their home country or could not return (15%). The remaining 14 per cent of survey participants were unsure about their plans.

Figure 3. Desire to return to the home country (%) n=654

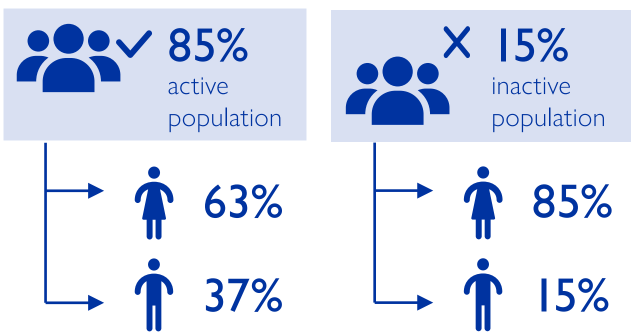


ACTIVE AND INACTIVE POPULATION

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=654) were actively involved in the workforce (37% of men and 63% of women), whereas 15 per cent of respondents remained inactive (85% of women and 15% of men).



The highest proportion of active respondents was observed in the age group of 30- to 39-year-olds (38%), followed by the age group of 40- to 49-year-olds (28%). Meanwhile, individuals over 60 years and the 18 to 29 age group had the highest proportion of inactive individuals (24% and 46% respectively).

Within the active population (n=556), 77 per cent were in employment (69% employed, 6% self-employed, and 2% daily workers), whereas the remaining 23 per cent were unemployed and looking for a job. Additionally, women were distinguished by a significantly lower share in employment as compared to men (70% versus 88%).

Figure 4. Active and inactive population after displacement, by age (%) n=654

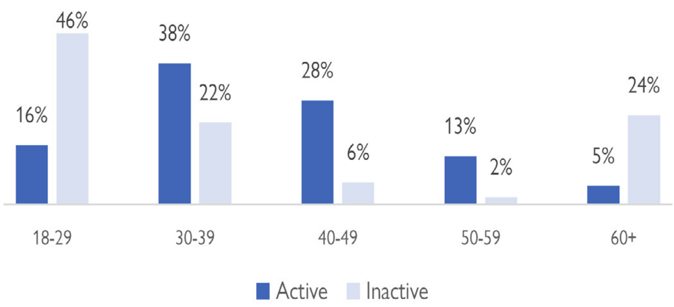


Figure 5. Employment status within active population after displacement (%) n=334

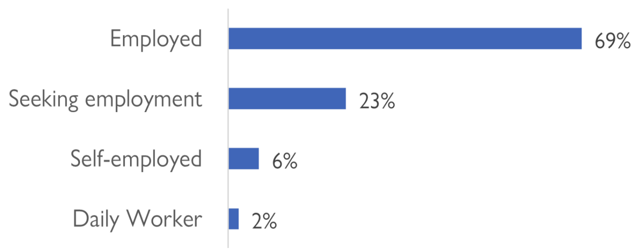
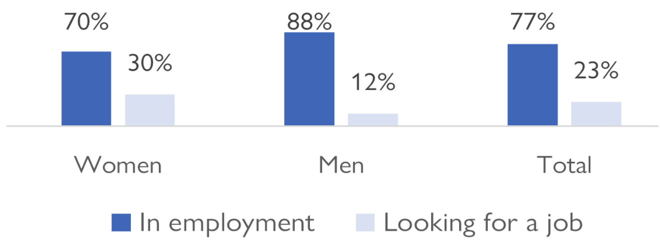
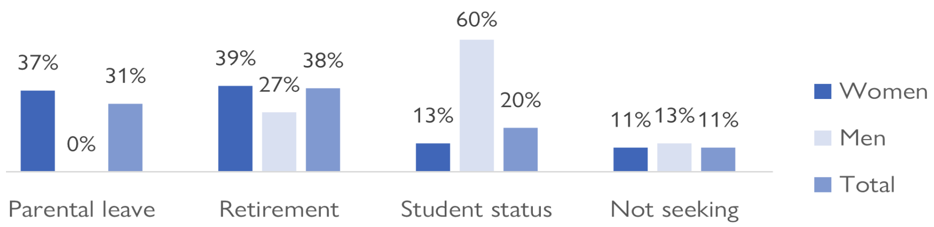


Figure 6. Employment status within active population after displacement by gender (%) n=334



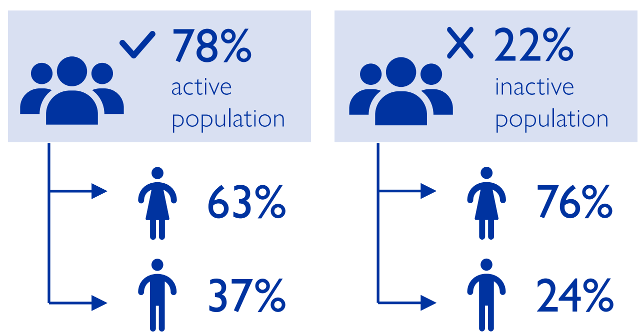
The inactive population consists of individuals neither employed nor actively seeking employment. Among the respondents, 15 per cent belonged to the inactive population (n=99). This percentage included people on parental leave (31%), retirees (38%), students (20%), and those who were unemployed without actively looking for a job (11%). Notably, 37 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 11%). Female respondents were more likely to be in retirement (39%) compared to male respondents (27%). Meanwhile, the proportion of individuals with the student status was significantly higher among men (60% versus 13%).

Figure 7: Status within inactive population (%) n=99



TRENDS BEFORE DISPLACEMENT

Prior to leaving Ukraine, 78 per cent of all respondents (n=654) were actively participating in the labour market, which is lower than the current rate of participation among respondents in Estonia (85%). The other 22 per cent were not actively involved. Similar to the situation after the displacement, there was a gender gap before respondents left Ukraine, as 37 per cent of men versus 63 per cent of women were active.



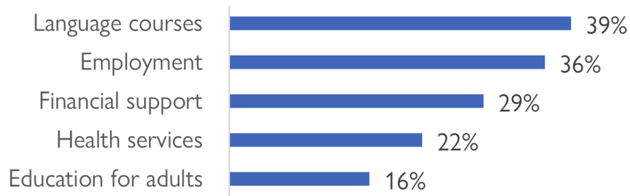
Eighty-nine per cent of those surveyed within the active population were employed (77% as regular employees and 12% as self-employed), while eleven per cent were actively seeking employment.

Within the inactive population, reasons for not participating in the labourmarket included parental leave (29%), retirement (24%), student status (39%), and individuals not actively seeking employment (8%). Prior to displacement, a larger percentage of women were working compared to men (93% of women compared to 83% of men). On the other hand, more men than women were unemployed and not looking for work before they had to leave Ukraine (17% versus 7%). Furthermore, more men were students compared to women (71% versus 29%).

EMPLOYMENT IN THE COUNTRY OF DESTINATION

The need for employment emerged as the second top priority, with 36 per cent citing it. Other priority needs included language courses (39%), financial support (29%), health services (22%), and education for adults (16%).

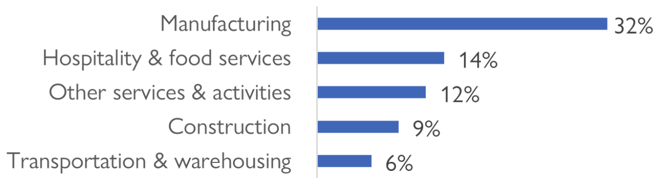
Figure 8: Top five priority needs (%) n=654



Multiple answers possible

Almost half of all interviewees were employed in manufacturing (32%) as well as hospitality and food services (14%). Meanwhile, twelve per cent were employed in other services and activities. Slightly less prominent sectors included construction (9%) and transportation with warehousing (6%).

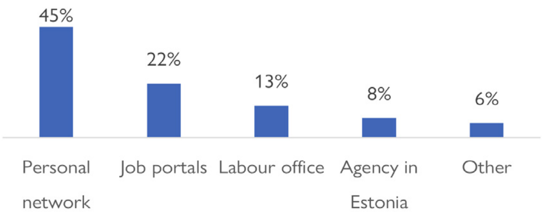
Figure 9. Top five sectors of employment (%) n=427



Multiple answers possible

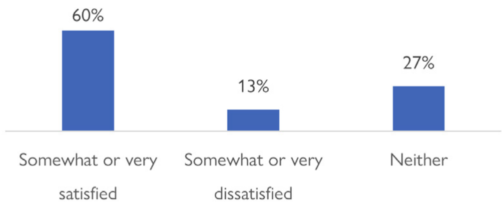
The majority of respondents utilized their personal networks to obtain their current employment (45%). The second and third most common means of finding employment were through job portals (22%) and Estonian labour office (13%). Some respondents used the help of agencies in Estonia (8%), while the other six per cent found their employment through other, unspecified ways. Sixty per cent of survey participants (N=485) were somewhat or very satisfied with their employment, while only thirteen per cent were somewhat or very dissatisfied. Over a quarter (27%) were neither satisfied nor dissatisfied.

Figure 10. Top sources of finding employment (%) n=414



Multiple answers possible

Figure 11. Employment satisfaction (%) n=654



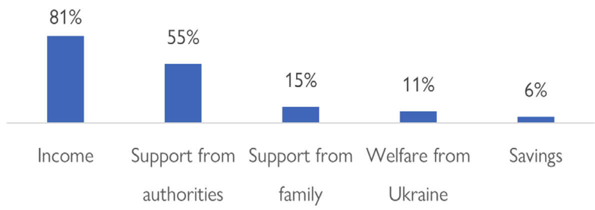
EXPENSES AND REMITTANCES

The respondents (n=654) relied on various means for covering their household's daily expenses. Personal income was specified by 81 per cent of respondents, while slightly over half of them referred to support from the authorities (55%). Fifteen per cent mentioned support from family, 11 per cent depended on welfare benefits from Ukraine, and 6 per cent used their personal savings.

The majority of respondents (83%) did not receive any funds from the country of origin, whereas 17 per cent were given remittances from 20 to 1,000 euros.

The percentage of survey participants who spent their funds in the country of origin was 49 per cent. For 86 per cent, it was a recurring monthly expense (n=269), and for the remaining 14 per cent it was a one-time transaction. About a half (51%) did not cover any expenses in Ukraine.

Figure 12. Top means of covering daily expenses (%) n=654



Multiple answers possible

Figure 13. Funds spent in the country of origin (%) n=641

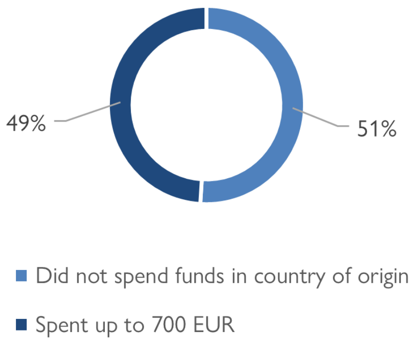
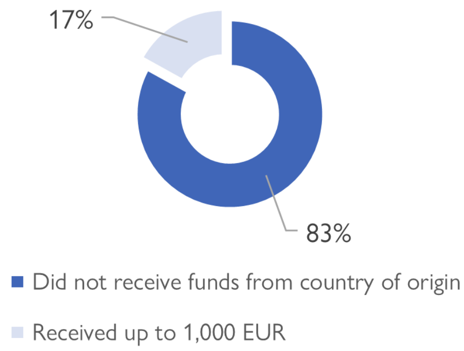


Figure 14. Funds received from the country of origin (%) n=651



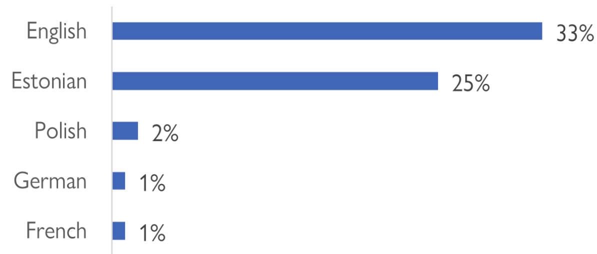
ECONOMIC INTEGRATION ENABLERS AND BARRIERS

KNOWLEDGE OF LANGUAGES

About a half of respondents (n=654) used Ukrainian as the main language of communication at home (51%), while 49 per cent used Russian. Survey participants also had the knowledge of other languages, the most common being English (33%), Estonian (25%) as well as Polish (2%), German (1%), and Spanish (1%).

The respondents were asked to evaluate their Estonian language reading, speaking, writing, and listening skills. Over a quarter reported having moderately good reading skills (28%), while only six per cent could read well or very well. Notably, nearly 66 per cent could not read well or at all. Similarly, almost one quarter indicated moderately good speaking skills (24%), three per cent spoke well or very well, and the majority could not speak well or at all (73%). In the case of writing skills, the share of those who could not write well or at all was also high (72%), while 24 per cent could write moderately well, and four per cent — well or very well. Lastly, over a quarter had moderately good listening skills (27%), four per cent — good or very good, while the skills of 69 per cent were not good or not good at all.

Figure 15. Main languages spoken (%) n=654



Multiple answers possible

Figure 16. Estonian language reading skills (%) n=654

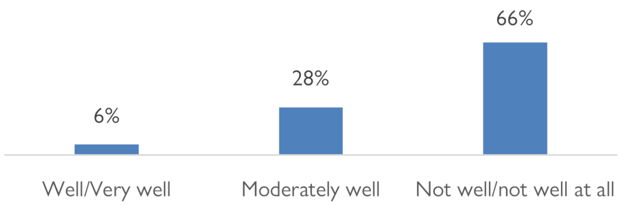


Figure 17. Estonian language speaking skills (%) n=654

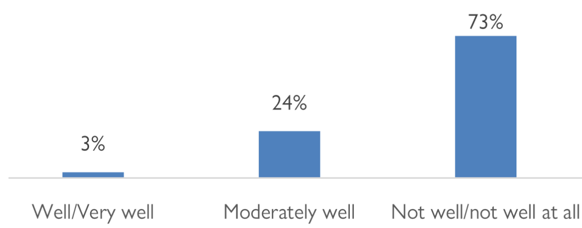


Figure 18. Estonian language listening skills (%) n=654

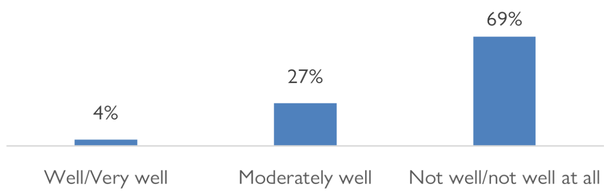
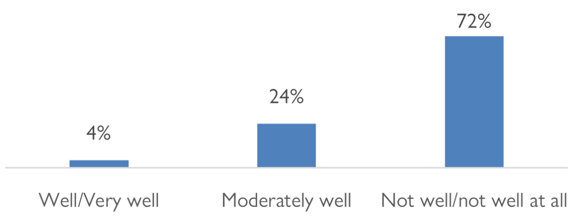


Figure 19. Estonian language writing skills (%) n=654

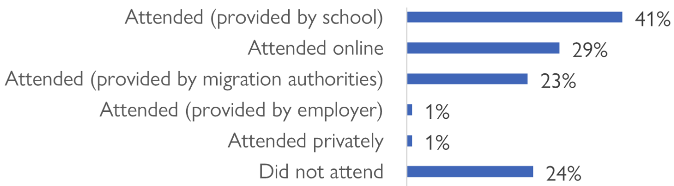


ESTONIAN LANGUAGE COURSES

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.

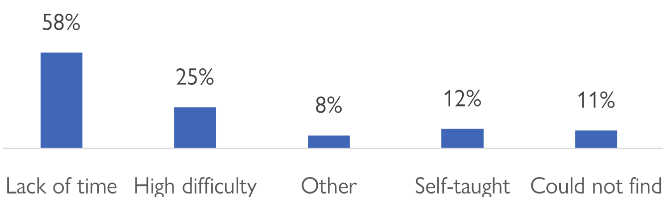
Figure 20. Attending an Estonian language course (%) n=654



Multiple answers possible

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 21. Reasons for not attending Estonian language courses (%) n=154



Multiple answers possible

ENTREPRENEURIAL AND PERSONAL DEVELOPMENT

While 64 per cent neither had a business nor were interested in opening one, almost one third of respondents (31%) expressed positive entrepreneurial attitudes. Within this group, very few already had a business at the time of the interview (3%), eight 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.

For 79 per cent of respondents within the group interested in opening a business (n=185), the lack of funding was the most significant obstacle. Survey participants also lacked sufficient legal information (56%), knowledge (56%), legal requirements (25%), and legal status (13%). Nine per cent had unspecified barriers to opening a business.

Figure 22. Possession of a business or interest in starting one (%) n=654

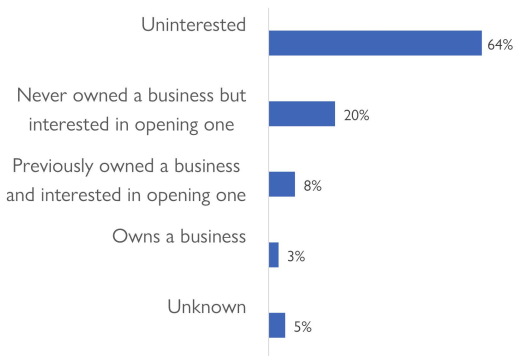
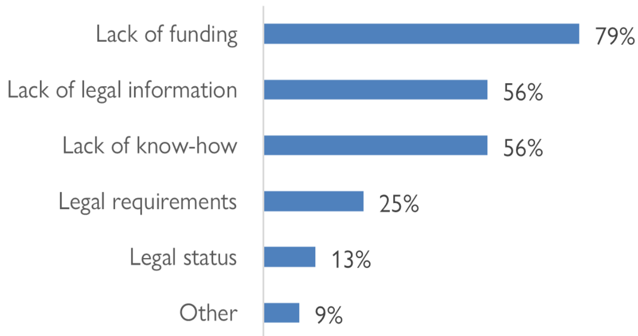


Figure 23. Obstacles to opening a business (%) n=185



Multiple answers possible

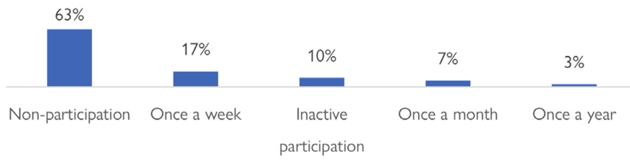
Half of all respondents (n=654) were willing to invest in their skills development through the means of training, learning, coaching, or other forms of personal development (50%). Nevertheless, within this group, only 16 per cent had sufficient funds for such an investment, while the other 34 per cent could not afford it.

Meanwhile, 42 per cent did not want to invest to develop their skills, and 8 per cent were unsure. Among the interviewees (n=154), investment willingness varied from 50 to 5,000 euros. However, a vast majority (97%) were inclined to invest between 100 and 1,000 euros.

WORK-RELATED GROUPS

While 63 per cent of respondents were not involved in any work-related groups or organizations, over a quarter (27%) participated in such groups once a week (17%), once a month (7%), or once a year (3%). Ten per cent specified inactive participation.

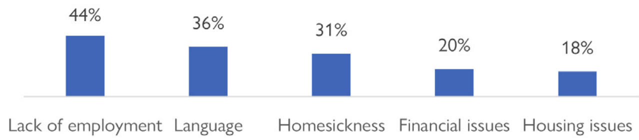
Figure 24. Participation in work-related groups (%) n=654



CHALLENGES

Lack of employment was the most significant inclusion challenge, with almost half of all respondents referring to it (44%). Meanwhile, language was the second biggest inclusion challenge (36%), followed by homesickness (31%), financial (20%) and housing (18%) issues.

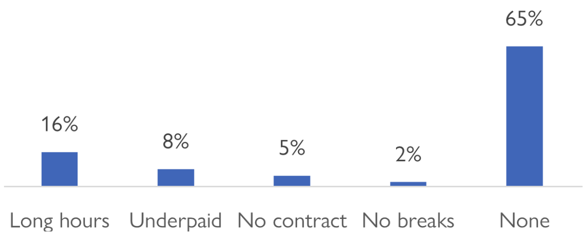
Figure 25. Inclusion challenges (%) n=654



Multiple answers possible

More than half of research participants (65%) did not have any problems in their workplace. However, sixteen per cent stated they had to work long hours, while eight per cent were underpaid. Moreover, five per cent reported working without a contract, and two per cent endured work without breaks.

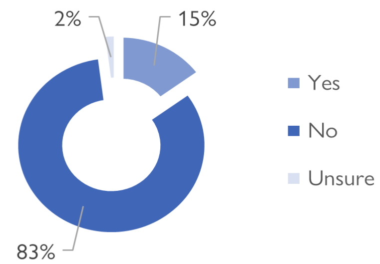
Figure 26. Top problems in the workplace (%) n=654



Multiple answers possible

While the majority of respondents (83%) did not experience any unequal treatment, fifteen per cent reported being discriminated against, and one per cent was unsure. When asked about the grounds for discrimination (n=96), survey participants could provide multiple answers, most often referring to nationality (95%) and language (16%).

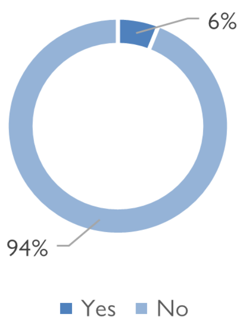
Figure 27. Unequal treatment (%) n=654



COUNTER-TRAFFICKING: EXPLOITATION IN THE WORKPLACE

Six per cent of all respondents (n=654) reported working or performing other activities without receiving the expected payment, while the rest 94 per cent did not encounter such situations.

Figure 28. Exploitation in the workplace (%) n=654



DTM survey with a refugee from Ukraine in Viljandi, 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 phone, on the streets, and at selected locations (collective centres, bus stations, IOM and NGO premises, shopping malls, dormitories, and the Embassy of Ukraine in Estonia) in eight 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 eight 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 eight 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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