

PATHWAYS FOR REGULAR MIGRATION: PERCEPTIONS OF MIGRANT WORKERS AND RECOVERY IN UKRAINE

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INTRODUCTION

The full-scale invasion of Ukraine in February 2022 has had dramatic consequences for the demographic and economic situation of the country, leaving Ukraine's prospects for recovery at risk. The war has exacerbated demographic challenges such as low fertility rates and emigration of Ukrainians abroad.¹ An estimated 6,483,500 Ukrainians are currently displaced abroad.² Younger population groups were most likely to have left the country, particularly women with children, with over 30 per cent of Ukrainian refugees in Europe estimated to be under 18 years old and 52 per cent between 18 and 59 years old.³ Factors such as mobilisation may also impact upon population growth in the future. According to the national census, Ukraine's population was 48.5 million in 2001.⁴ It is projected to decrease by half, reaching 25.2 million by 2051.⁵

The war has also dramatically affected Ukraine's economy, impacting industries and businesses' ability to operate, causing large-scale displacement both internally and abroad, as well as resulting in the mobilisation of working age Ukrainians.⁶ The resultant labour shortage was identified by Ukrainian employers as the primary challenge they face, ahead of security risks and access to capital.⁷ The Ministry of Economy and the ILO estimates that between 4.5 and 8.6 million additional workers are needed over the next ten years in order to achieve the Government's GDP growth targets.⁸ In an eventual post-war scenario of reconstruction and economic recovery, labour needs are set to grow significantly.

Pathways for regular migration are an essential component of Ukraine's recovery, addressing labour shortages and demographic challenges. The demographic and economic strategies under development by the Government of Ukraine identify the need to attract Ukrainians living abroad back to Ukraine, support women to enter the labour market, and support IDPs to adapt to the labour market demands in their area of displacement, amongst others. While these remain crucial components of Ukraine's recovery, addressing the current and anticipated labour gap will also require a broader set of instruments and strategies related to immigration.

IOM is supporting the Government of Ukraine to develop and update national strategies on migration, demography, and employment. To support the development of these policies in Ukraine, the potential challenges and opportunities of labour immigration in Ukraine must be assessed and regularly updated, as the context changes. **This thematic brief provides an evidence base for the development of migration policies and interventions, providing data-driven insights on perceptions of - and challenges to - labour immigration among the general population.** The brief provides data on the experience of Ukrainians with migrants prior to the full-scale invasion, how the general population perceives the arrival of migrant workers in the coming years; and identifies potential barriers to integration or sources of tensions, which require a comprehensive response to facilitate safe migration and social cohesion.

KEY FINDINGS



The population's attitude to migrants arriving in Ukraine is overall positive but remains conditional to economic and cultural considerations.



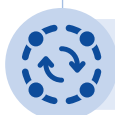
The majority acknowledge a labour shortage in Ukraine at present and consider the arrival of migrants as beneficial for Ukraine's economy (73%). However, the general population expects migrants to be lower-skilled workers, while employers report gaps in both lower-skilled and trained professional roles.



Despite the perceived benefits, competition over jobs was the main concern reported (17%) regarding the arrival of migrants. More than half of the population believed migrants should only be allowed to work in sectors of the economy where they perceived a shortage of Ukrainian workers. Additionally, 40 per cent of the population believed migrants should not be allowed to work in the education sector and 27 per cent were opposed to migrants working in the health sector.



The arrival of migrants working in Ukraine raised more concerns for individuals currently unemployed and looking for work, seeing them as a source of competition for employment.



The ability of migrants to speak a local language was considered the most important factor for integration, reported more frequently than the migrants having a similar ethnicity and religion to the local population.



Elderly individuals and those living in rural areas had more concerns over migrants coming to the country. Conversely, younger individuals and students had more positive perceptions regarding the arrival of migrants and their support to the economy.

¹ *The Demographic Challenges to Ukraine's Economic Reconstruction*, Maryna Tverdostup, July 2023

^{2,3} UNHCR, *Ukraine Refugee Situation Dashboard*

⁴ Government of Ukraine, *National Population Census, 2001*

⁵ Ptoukha Institute for Demographics and Social Studies, *Population forecasting is limited by the lack of necessary statistical data, including inability to record demographic events in temporarily occupied territories, and the multiple scenarios of the progression of the ongoing war with the Russian Federation.*

⁶ ILO, *Prospects for achieving Ukraine's 2032 GDP target: A labour market perspective*, September 2023

⁷ MOE and IOM, *Employers Study, 2024*

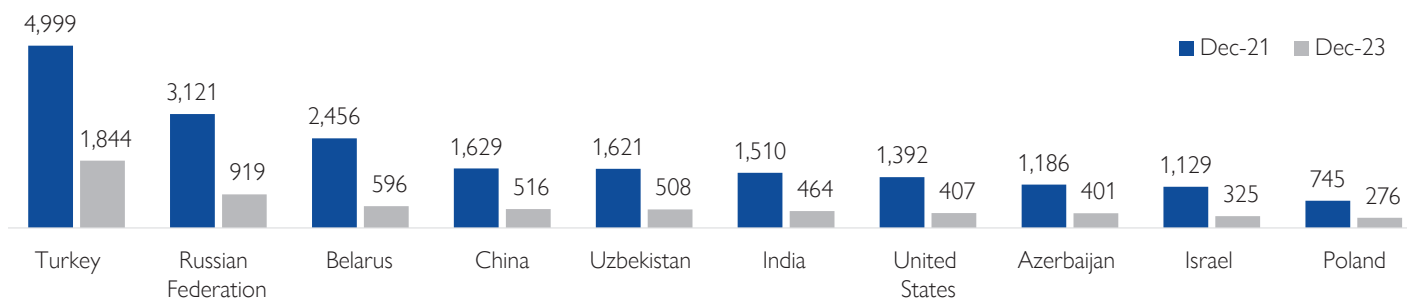
⁸ ILO, *Prospects for achieving Ukraine's 2032 GDP target: A labour market perspective, September 2023; Ministry of Economy, July 2023*

1. LABOUR MIGRATION BEFORE AND AFTER THE FULL-SCALE INVASION

Immigration to Ukraine was in decline prior to the full-scale invasion, affected by the start of the war in 2014 and the restrictions linked with the COVID-19 pandemic.⁹ In December 2021, the State Migration Service recorded 31,299 migrants with temporary residence permits to work.¹⁰ As of December 2023, the State Migration Service recorded

9,987 migrants with a residence permit to work in Ukraine (Figure 1). The main countries of origin for these migrants were Turkey, Russia, Belarus, China and Uzbekistan. The vast majority resided in Kyiv city and oblast (58%), followed by Odeska (8%) and Lvivska Oblasts (7%).¹¹

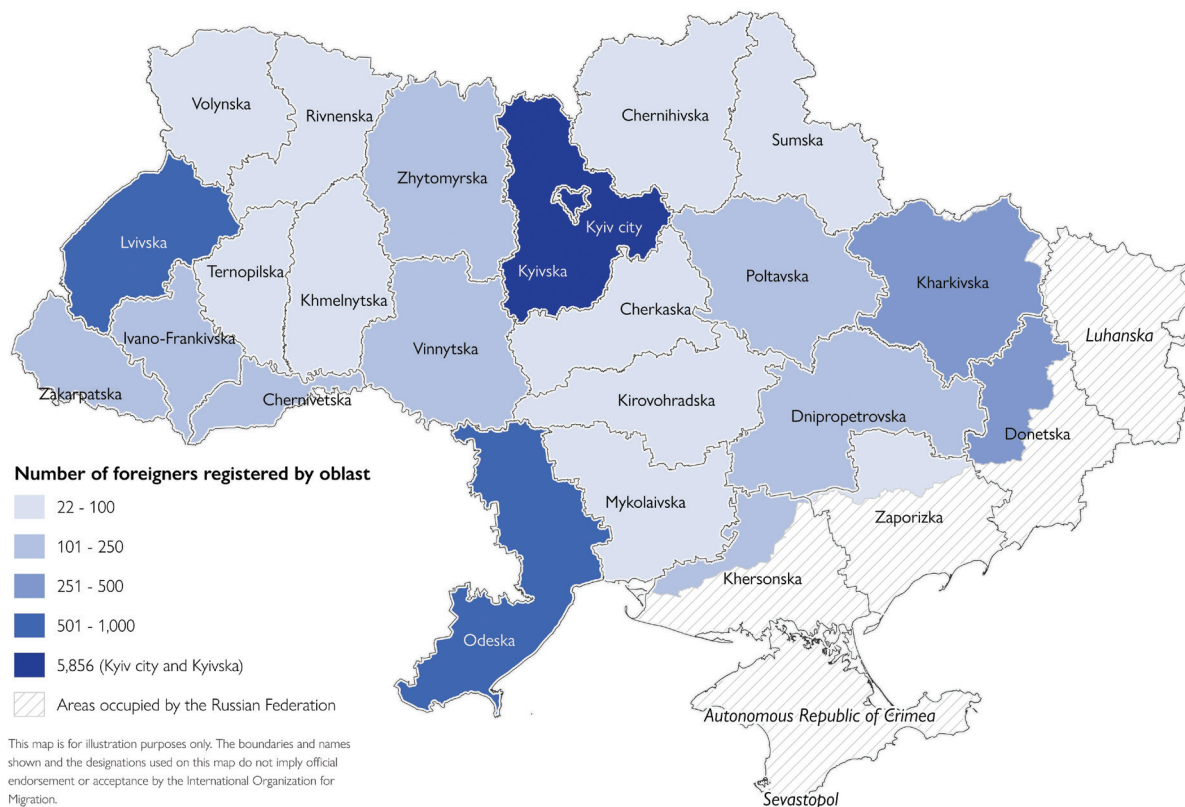
Figure 1: Total number of migrants (or stateless individuals) who had temporary residence permits for employment purposes in Ukraine in December 2021 and December 2023, by country of origin¹²



In another study, IOM data reveals that the conditions for safe and sustainable labour migration might not be present in some areas hosting relatively high number of migrants currently.¹³ In Odeska Oblast, 69 per cent of the general population who worked in the 12 months prior to the survey reported experiencing at least one potential indicator

of labour exploitation, mainly having to work long hours and working without contracts, most commonly in the wholesale or retail trade, manufacturing, construction, agriculture, transportation and storage sectors. This highlights the region as an area for policy and programme interventions to facilitate safe migration and labour protections.

Map 1: Presence of migrants with a residence permit to work in Ukraine as of December 2023, based on State Migration Services data



⁹ IOM, *Migration in Ukraine: Facts & Figures*, 2021

¹⁰ The data was received by IOM based on a request to the State Migration Services, Immigration permits for permanent residence in Ukraine. The data remains limited due to the lack of ability to track the registration of migrants in NGCA territories after 2014.

¹¹ This information does not include migrants without residence permits to work, the number of residence permits does not necessarily mean that the individual is currently living in Ukraine, finally this information does not include migrant holders of temporary residence permits.

¹² The data was received by IOM based on a request to the State Migration Services, Immigration permits for permanent residence in Ukraine.

¹³ IOM, *Vulnerability to Trafficking in Persons and Labour Exploitation in Ukraine*, June 2024

2. PERCEPTIONS OF UKRAINIAN POPULATION ON MIGRANTS AND UKRAINE’S RECOVERY

EXPERIENCES BEFORE THE FULL-SCALE INVASION

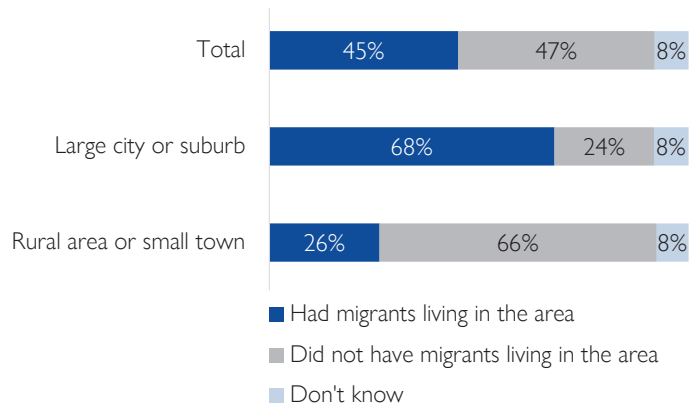
In recent decades, Ukraine has experienced limited immigration and, consequently, fewer than half of all respondents reported being aware of migrants residing in their community before the full-scale invasion (45%).¹⁴ Awareness of migrants in the community was highest among respondents in Kyiv City (80%), followed by Odeska (56%) and Kharkivska Oblasts (51%). Those in urban areas were far more likely to be aware of migrants in their community (68%) compared with those in rural areas (26%).

Despite this limited interaction with migrants, a majority of respondents (57%) felt positive or very positive towards them when asked about their perceptions of migrants living in their communities before the full-scale invasion. Additionally, 39 per cent reported a neutral attitude, while only 3 per cent reported feeling negatively.

PERCEIVED OPPORTUNITIES OF IMMIGRATION TO UKRAINE

When asked about their opinions on migrants arriving to Ukraine in the present time, 47 per cent of individuals reported that this would be a positive thing and that they had no concerns. The primary reason for the positive perception of migrants arriving is their perceived support to the economy, with 48 per cent of people believing they benefit the Ukrainian economy. This is linked to the perceived challenges that the Ukrainian economy is currently facing, with three quarters of respondents believing that Ukraine is currently experiencing a shortage of workers in some sectors (74%). While no significant differences

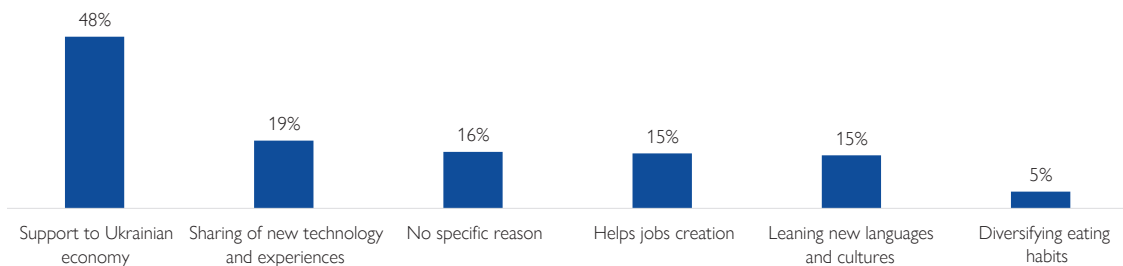
Figure 2: Proportion of individuals reporting migrants to have lived in the area prior to the full-scale invasion, by settlement type



were noted between regions, or the gender or age of the respondents, unemployed respondents were marginally less likely to agree that there was a labour shortage (67%), when compared with respondents that owned businesses or students (80%).

Business owners were also more likely to identify positive aspects of migrants arriving, with 30 per cent reported migrants would bring in new technologies and experiences to the labour market and a quarter believe that migration would support the creation of jobs.

Figure 3: Proportion of individuals reporting positive impacts of migrants arriving to work in Ukraine now or in the near future



LABOUR GAPS AND LABOUR IMMIGRATION NEEDS

In a study conducted with employers across Ukraine in 2024, 60 per cent of employers reported a lack of qualified labour as their primary challenge, which they attributed to mobilisation, the emigration of qualified Ukrainians abroad and their inability to pay competitive wages.¹⁵ Internal displacement also plays an important role in labour market participation, with 16 per cent of IDPs and 9 per cent of returnees unemployed, but actively seeking work, compared with 6 per cent of the non-displaced population.¹⁶ When examining the support needed by those IDPs and returnees who were unemployed but seeking work, 47 per

cent expressed a need for skills-training or obtaining new qualifications, followed by 43 per cent who sought access to apprenticeships or internship opportunities as well as consultation for employment and career development, and 39 per cent highlighting a need for support with online employment. Therefore, the 'skills mismatch' identified by both employers and those seeking work in Ukraine remains a crucial factor in programming and policy design to foster economic resilience, relevant to increased domestic labour market participation and identifying labour immigration needs.

MIGRANTS IN UKRAINIAN SOCIETY

Beyond the economic benefits that many associate with the arrival of migrants, a significant proportion viewed it as an opportunity to learn new languages and cultures (15%), as well as to diversify eating habits (5%). When asked about whether migrants should be able to access

public services when in Ukraine, most individuals were in favour. For example, 95 per cent responded positively to migrants' children having access to public Ukrainian education, and 92 per cent for migrants having access to public healthcare services.

¹⁴ For this question respondents were asked about their experience with migrants regardless of their status (working, studying in Ukraine or other).

¹⁵ MOE and IOM, *Employers Study*, 2024

¹⁶ IOM, *General Population Survey, Round 16*, April 2024

¹⁷ Respondents were allowed to select several answers for this question.

3. PERCEPTIONS OF RISKS FROM LABOUR MIGRATION

When asked about the primary concerns they had towards migrants arriving in Ukraine almost half reported not having any concerns (47%). For those who did report concerns, **the fear of migrants as competition for available jobs was the highest reported (17%)**, followed by cultural fears of migrants not adapting to Ukrainian cultural norms (11%). To ensure safe migration pathways, certain economic and cultural concerns must be considered.

The share of unemployed respondents expecting that migrants will be supportive of the economy was the lowest amongst all groups (41%), suggesting **a potential source of tensions for those in search for work seeing migrants as potential competitors on the labour market**. The perceived risk of additional competition on the labour market leads a majority of individuals in favour of a conditional arrival of migrants to some sectors of the economy: **63 per cent stated that migrants should only work in sectors where there is a shortage of Ukrainian workers**.

In addition, around half of respondents (48%) supported prohibiting migrants from working in certain sectors of the economy. Among those who expressed a desire to restrict the sectors within which migrants should be allowed to work, the vast majority identified construction (91%), industrial sector (83%) and agriculture (81%). Conversely, a significant proportion were opposed to migrant workers in essential services such as education (40%) and healthcare (27%).

Figure 5: Proportion of individuals reporting on prohibition of migrants, by sector of activity

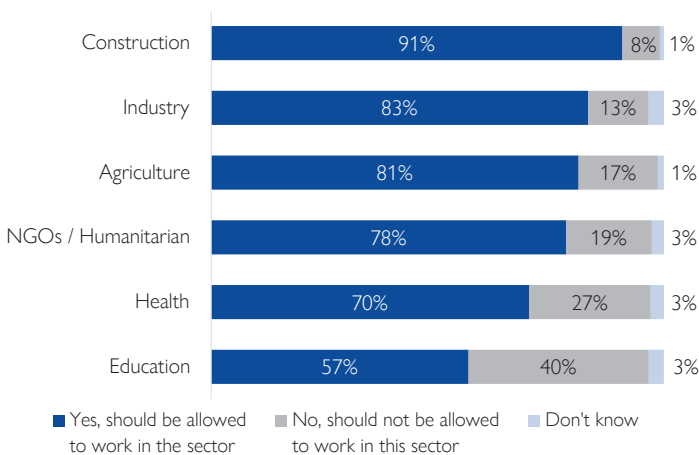
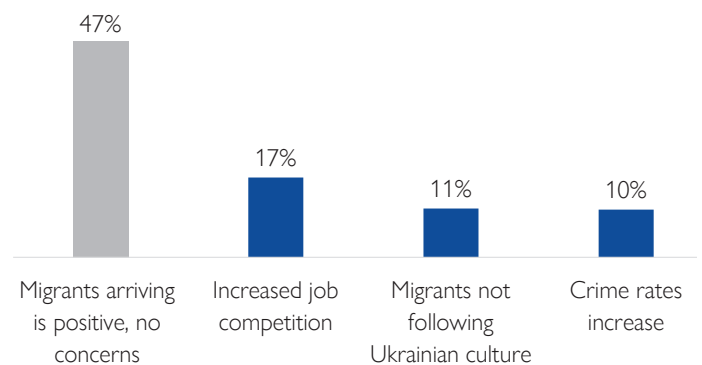


Figure 4: Most reported concerns if migrants were to arrive to Ukraine for work during the present time¹⁷



RISKS OF LABOUR EXPLOITATION

Findings from another IOM study indicate that the most commonly reported sectors of the economy where workers experience potential indicators of labour exploitation are: wholesale and retail trade (16% out of those who reported risks of labour exploitation), manufacturing (15%), construction and agriculture (9% each).¹⁸ An estimated 42 per cent of those working faced working long hours and working without contract or incomplete contract (22%), followed by being underpaid (7%) and not allowed to take breaks (6%). Migrant workers face a unique set of vulnerabilities with regards to indicators of labour exploitation, and their potential inclusion in these sectors of the economy should be a focus of policy and programme interventions to facilitate safe migration and labour protection.

THE ROLE OF MIGRANTS IN UKRAINE'S ECONOMY

Findings indicate some contradictions between the roles envisaged for incoming migrants by the general population, mainly filling in low-skilled labour gaps (Figure 5), while employers reported in a national survey lacking both low and highly skilled workers.¹⁹ The lack of skilled labour force is primarily attributed to the displacement abroad of many Ukrainians with high qualifications. While 92 per cent of respondents were positive about working side-by-side with migrants, far fewer were positive about a scenario in which they were managed by a migrant (56%). **To mitigate risks of social tensions, policies facilitating the arrival of migrants in Ukraine will need to consider these discrepancies between perceptions of migrants' role and space in Ukrainian economy compared to labour market needs.**

4. FACTORS AFFECTING THE INTEGRATION OF MIGRANTS

FACTORS RELATED TO THE MIGRANTS

Respondents were also asked to rank the characteristics that they deemed necessary for migrants to integrate and be accepted in their community from 'not important' to 'very important'. **The characteristic most identified of high importance was the migrants' ability to speak a local language:** 45 per cent considered this 'important' or 'very important'. Fewer respondents identified ethnic or religious homogeneity with the community as important or very important for integration and acceptance: only 18 per cent for both.

The importance ascribed to religious homogeneity increased with the age of the respondent, with almost a quarter of respondents aged 60 and above (23%) identifying this as important or very important, compared to 11 per cent of respondents aged 18 to 24 years old. Elderly respondents were also more likely to consider the ability to speak a local language important (49%) compared with younger respondents (37%). No significant differences were noted between female and male respondents.

¹⁷ Respondents were allowed to select several answers for this question.
¹⁸ IOM, *Vulnerability to Trafficking in Persons and Labour Exploitation in Ukraine*, June 2024
¹⁹ MOE and IOM, *Employers Study*, 2024

Those in western oblasts were most likely to state them as important, compared with the national average, perhaps highlighting greater barriers to social integration for migrants – which has parallels with the higher prevalence of perceived discrimination among IDPs displaced in the West.^{20,21}

DEMOGRAPHICS AND PERCEPTIONS OF MIGRANTS

Elderly individuals were more likely to express concerns regarding the arrival of migrants working in Ukraine. They had less experience with migrants prior to the full-scale invasion, were more in favour of conditionalities for them working in Ukraine economy and had more concerns – both economic and cultural – regarding their arrival to Ukraine. 29 per cent of individuals aged 60 and above were against migrants' ability to remain permanently in Ukraine, compared to 18 per cent of those aged 18 to 24.

In an opposite trend, youths and students were most welcoming and showed least concerns about migrants coming to work in Ukraine. When asked about their experience integrating with migrants, younger respondents were more likely to report positively, especially with regards supporting the Ukrainian economy, where 60 per cent of 18-24 years old respondents reported so compared to 47-49 per cent among other age groups.

Individuals living in rural areas also more frequently conveyed concerns over migrants coming to work in Ukraine compared to those living in urban centres. Notably, respondents in rural areas were marginally more

CONCLUSION

Overall, perceptions of migrants coming to Ukraine are positive. Several concerns would need to be considered and addressed to ensure safe and dignified migration to Ukraine. A majority of individuals in Ukraine consider it appropriate and positive for migrants to participate in low-skilled and more manual sectors of the economy. However, available data highlights that labour gaps extend beyond these sectors in Ukraine as a result of emigration, displacement abroad and other factors. Additionally, due to risks of potential labour exploitation in sectors of the economy and regions where migrants are likely to work, policies must ensure safe working conditions for incoming migrants. Economically vulnerable individuals such as persons who are unemployed, internally displaced or veterans, who may need support to enter the labour market, must be

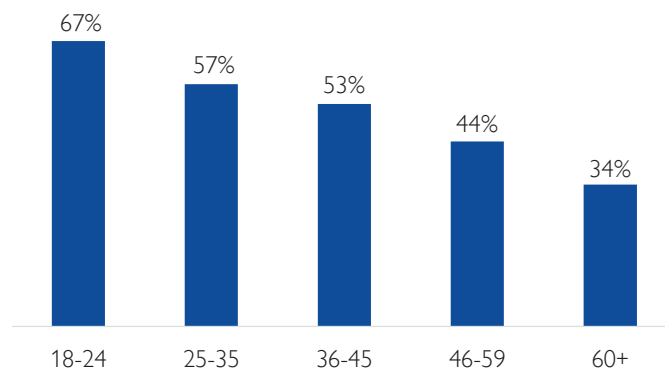
METHODOLOGY

The data presented in this report was commissioned by the International Organization for Migration (IOM) and collected by Multicultural Insights (MCI). Data was collected through phone-based interviews, with respondents identified through a nationally representative screening survey of 4,000 individuals. Data collection was carried out between (March and April 2024). All interviews were conducted using a random-digit-dial (RDD) and computer-assisted telephone interviewing (CATI) approach, generating results with an overall margin of error of 1.35% [CL 95%]. The survey included all of Ukraine, excluding the Autonomous Republic of Crimea (ARC) and the areas of Donetsk, Luhanska, Khersonska, and Zaporizka Oblasts under the temporary military control of the Russian Federation where phone coverage by Ukrainian operators is not available. All interviews were anonymous, and respondents were asked for consent before starting the interview. The teams consisted of male and female interviewers, and the interviews were conducted in Ukrainian and Russian, with language selection based on the preference of each respondent. For this study, migrants were

A key aspect of migrants' arrival to Ukraine was respect of Ukrainian cultural practices and traditions, with 94 per cent reporting this as 'important' or 'very important'. **Therefore, to ensure a safe integration of migrants, policies must take into consideration the risks related with language and cultural integration of migrants.**

likely to report a positive perception of migrants (61% compared to 55% of respondents in urban areas), perhaps reflecting anxieties related to competition for limited job opportunities in urban centres.

Figure 6: Respondents being aware of migrants living in their area prior to 2022, by age of respondent



considered to avoid potential tensions and facilitate pathways for regular labour migration.

Beyond the economic concerns, policies that support migrants to understand local customs and languages can strengthen integration and social cohesion within communities. To diminish risks of social tension and labour exploitation of migrants, policies and programmes should address populations most concerned by the arrival of migrants and the sectors of the economy where the general population perceive the highest need for migrant labour, and where potential indicators of labour exploitation are highest.

defined as foreign citizens, residing in Ukraine. Russian citizens were excluded from the study to avoid skewing the results.

Limitations: The exact proportion of the excluded populations is unknown. Those currently residing outside the territory of Ukraine were not interviewed, following active exclusion. The sample frame is limited to adults that use mobile phones. It is unknown if all phone networks were fully functional across the entire territory of Ukraine for the entire period of the survey; therefore, some respondents may have had a higher probability of receiving calls than others. Residents of areas with a high level of civilian infrastructure damage may have a lower representation among the sample – one may assume the needs in the report are skewed towards under-reporting. Among the people surveyed are not those residing in the Autonomous Republic of Crimea (ARC) or Areas of Donetsk, Luhanska, Khersonska, and Zaporizka Oblasts not under the control of the Government of Ukraine since 2014.

²⁰ These findings reflect similar findings from UNDP's SCORE assessment which shows that individuals in western regions are less inclined to immigrants.

²¹ Western Oblasts include: Zakarpatska, Lvivska, Ivano-Frankivska, Ternopil'ska, Volyn'ska, Tchernivetska, Rivnenska and Khmelnytska Oblast.



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