

Migration potential of working-age population in Estonia in 2013

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In 2013, the Ministry of Social Affairs (MoSA) ordered for the fifth time a survey to determine the migration potential of Estonia's working-age population, i.e. the number of persons in Estonia who firmly intend to work abroad and have made preparations to this end. The survey conducted in spring 2013 by AS Emor involved 1504 Estonian residents aged 15-64. The survey was financed from the European Social Fund (ESF).

The survey results were used as input for an analysis to determine the migration potential, the seriousness of intentions to work abroad, the planned length of stay abroad, the features characterising potential persons emigrating to work abroad, the reasons of going abroad, and the main barriers to migration. Further, it was essential to determine how the results have changed compared to previous surveys.

The last Migration Potential Survey was conducted by the MoSA in 2010. The said survey revealed that the number of working-age persons intending to work abroad has grown in comparison to the preceding years. In 2006, the migration potential of Estonia's working-age population amounted to an estimated 3.9% of the working-age population (about 35 900 persons), but in 2010, this figure had grown to 8.5% (about 76 400 persons). Given the labour market developments, this result was not surprising, because in the 1st quarter of 2010 the unemployment rate reached all-time high. Hence, it was evident that the population's interest in working abroad was exceptionally high during the economic crisis. As we know, the labour market situation improved by 2013 and the results of this survey indicate that in 2013 the migration potential had dropped compared to 2010 - to a level of 5.9% - meaning that 51 600 working-age persons in Estonia firmly intend to work abroad and have made preparations to this end.

Introduction

The decreasing labour force in Estonia has become a public concern for two reasons. Firstly, Estonian population is ageing like in many other European countries, which means that every year the number of employees exiting the labour market exceeds the number of labour market entrants. Secondly, the number of persons employed on the Estonian labour market is affected by emigration and working abroad. The labour shortage caused by diminishing labour force is not yet perceived as acute, but sooner or later this issue will become much more prominent.

Acceding the European Union has opened up foreign labour markets for the Estonian population allowing people to start working outside Estonia. This has entailed a growth in the number of persons working abroad. Primarily, two data sources are used in Estonia to determine the number of people living and working abroad: the migration statistics collected by Statistics Estonia and the Estonian Labour Force Survey (ELFS). The migration statistics of Statistics Estonia is based on people's voluntary registration of their place of residence in the Population Register in combination with information from the Tax and Customs Board and the data on Estonian citizens who have registered Finland as their place of residence. However, it should be noted that some Estonian citizens who have emigrated to live abroad do not notify the Population Register of their new place of residence which means that the number of Estonian residents actually living abroad might be greater. Furthermore, emigration statistics cannot be used as a basis for providing an overview of labour migration as the reasons for emigrating might be other than working abroad.

The ELFS data records people who work abroad, but have their permanent residence in Estonia but even that survey underestimates the total number of migrants because the survey recognises only persons staying away from Estonia temporarily¹. Therefore, the ELFS allows determining the approximate number of persons working abroad, but not the number of emigrants. In this context, it should also be noted that the actual number of people working abroad might be greater than indicated by the survey, because the survey sample might not include a representative number of people working abroad.

To complement the aforesaid statistical data and allow better monitoring of labour market developments, it is essential to collect additional information on the total number of people planning to work abroad, the socio-demographic indicators, professional background, and factors facilitating or obstructing working abroad. To achieve the set objective, the MoSA commissioned the fifth Migration Potential Survey. The MoSA has ordered this survey also in 2000, 2003, 2006 and 2010. Since the methodology of earlier surveys (2000, 2003) is not identical, this policy analysis refers to the survey results from 2006 and 2010. The data used in graphs originate from the survey conducted by OÜ Faktum & Ariko in 2006² and the data for 2010 are based on the results of the survey conducted by OÜ Eesti Uuringukeskus and AS Norstat³.

The surveys on migration intentions allow rather accurate assessments of the number of people actually intending to work abroad. The 2010 Migration Potential Survey indicated that the migration potential of working-

¹ The total population of the Estonian Labour Force Survey is formed by working-age people living in Estonia permanently (over one year) and those who live in Estonia but intend to stay abroad less than a year are deemed to be staying away on a temporary basis. Thus, migration can be analysed based on an earlier experience in working abroad and on current employment in a foreign country. The Labour Force Survey considers an Estonian resident as employed regardless of whether his/her place of work is on or outside the territory of Estonia.

² 2006. The results of the 2006 survey are available in the policy analysis of the MoSA "Migration intentions of working-age population in Estonia" by Kaili Järv.

³ 2010. An overview of the results of the 2010 survey is given in the policy analysis of the MoSA "Migration potential of working-age population in Estonian in 2010" by Brit Veidemann.

age population in Estonia is estimated to be 8,5% meaning that about 76 400 working-age people firmly intended to work abroad and had made preparations to this end. The 2013 Migration Potential Survey shows that in the last five years 8,5% of Estonia's working-age population has worked abroad, i.e. the 2013 survey yields the same results as forecast in 2010. According to the 2013 Eurobarometer Survey (European Commission, 2013), even more people have worked abroad. The survey results reveal that in 2013 15% of Estonian population aged over 15 had worked or were currently working abroad. In 2013, the average value of this indicator for the entire EU amounted to 9% meaning that Estonian residents are much more prone to work abroad than an average EU citizen. Furthermore, Viira (2010) has pointed out that Estonia is one of the major countries of origin for commuting workers in Europe - there are 15,8 cross-border commuters per thousand capita in Estonia. To determine whether Estonia's working-age population intends to continue working abroad as actively as in the previous

years, it is important to find out the migration potential in 2013 or the number of people who intend to work abroad in the future.

The following policy analysis is broken down into five chapters. Chapter 1 provides an overview of the past migration trends of Estonia's working-age population and their practices of working abroad drawing on the available migration statistics and the ELFS. Chapter 2 analyses the main results of the 2013 Migration Potential Survey, describes the degree of the migration potential of working-age population in 2013 and indicates the destination countries where Estonian residents prefer to work and their intended length of stay. Chapter 3 characterises the working-age people who intend to work abroad providing an overview of their breakdown by gender and age, and their educational background and level of qualifications. Chapter 4 describes the professional background of people intending to work abroad and Chapter 5 outlines the factors facilitating or obstructing working abroad.

1. Overview of the emigration of population and working abroad

Over the last decade, the cross-border working and migration of Estonian residents have been strongly influenced by two events – EU accession in 2004 and the global economic crisis which started in 2008. As a result of joining the EU, all EU Member States have now opened up their labour markets which has allowed Estonian population to go and work abroad without restrictions. Likewise, the economic crisis affected the Estonia population's situation on the labour market - in two years (from the 1st quarter of 2008 to the 1st quarter of 2010), the number of employed on the labour market dropped by about 108 000 and the number of unemployed increased by 106 000. The economic crisis entailed salary cuts and boosted unemployment, thus considerably compromising the Estonian population's prospects of finding desired jobs in accordance with their quali-

fications on the Estonian labour market. The labour force was forced to seek work further away from home – in some cases, an equivalent alternative to moving to the capital was taking up employment in Finland or Scandinavia. The economic crisis can also serve as a reason for the growth in the number of people who emigrated and worked abroad in 2009-2012 as shown in Figure 1.

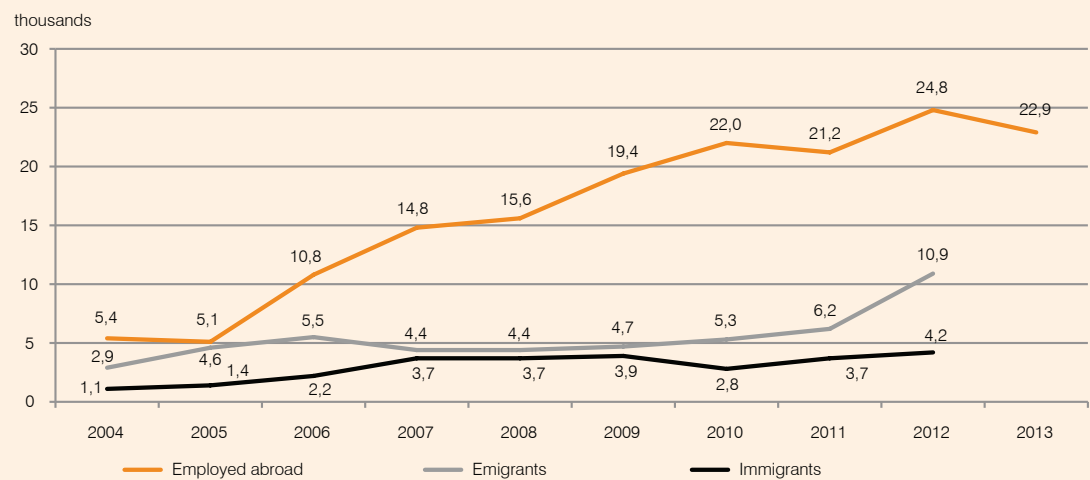
Their number increased remarkably in 2012. According to the ELFS, in 2011 21 000 people worked abroad on the average which amounts to 3,5% of all employed aged 15-74, but in 2012 the number of people working abroad grew by 17% meaning that 24 800 people or 4,0% of the total employed working-age population worked outside Estonia. In 2013, the indicator for working abroad dropped a little – 22 900 people worked

abroad accounting for 3,7% of the total employed population.

Similarly to working abroad, in 2012 the number of emigrants increased considerably or by 76%. In this regard, Statistics Estonia have commented (in 2014) that the migration figures for 2012 are overestimated because in 2012 those who had actually left Estonia earlier were also recorded as emigrants. However, in the recent years, return migration has increased in parallel to emigration. For example, the current return migration to Estonia exceeds the rate of emigration from Estonia a decade ago. In 2012, 70% of immigrants were Estonian citizens or people born in and returning to Estonia and their children born abroad. According to Statistics Estonia (2013), 30-40% of Estonian citizens who emigrated have returned to Estonia in the recent years.

As a result of increased emigration and increased immigration, the net migration has been relatively stable over the recent years, remaining negative by two to three thousand⁴, i.e. more people have emigrated from than immigrated to Estonia. Eurostat's long-term demographic forecast expects the net migration to remain negative until 2030, peaking in 2020 when the annual difference between emigrants and immigrants is 1000 people, on the average. However, Estonia's net migration was negative by more than 2500 people already in 2010-2011. Leetma and Vörk (2013: 154) have pointed out that the net migration has been rather underestimated which means that emigration aggravates even further the poor availability of qualified workforce as expressed by Estonian businesses and boosts the need to make better use of the existing workforce potential or, instead, increase immigration.

Figure 1. Estonian residents employed abroad, emigrants and immigrants, 2004-2013



Source: Statistics Estonia, Estonian Labour Force Survey, migration statistics

An interesting trend emerges when looking at the main socio-demographic characteristics of people who have emigrated from Estonia and working abroad. There are more female than male emigrants - however, men are dominant among those who work abroad

but reside in Estonia. In 2012, women accounted for 54% (5800 persons) of Estonian emigrants and men for 46% (5100 persons), whereas only 13% (3300 persons) of those working abroad were women and 86% (21 400 persons) were men.

⁴ Statistics Estonia (2014) has commented that the negative net migration in 2012 is actually much smaller than shown on the figure, amounting to no more than 3700 people.

Puur et al find (2013) that the high emigration rate in 2000s was not only due to EU accession and Estonia's lower living standard – another contributing factor was that in the 2000s the large generations of the 1980s reached the primary migration age. Therefore, it is no surprise that in Estonia and elsewhere in Eastern Europe where the birth rate was considerably higher in 1980s than it is now the population's emigration potential is high due to the large number of persons in their prime working age. Hence, in 2012, 31% of emigrants were aged 25-34 and 40% of people working abroad were aged 25-34.

Since the 2000s, the major destination country for emigration and working abroad has been Finland – during the current decade, half of the emigrants have gone to Finland. In 2012, the people who relocated to Finland made up 59% of all emigrants (6400 out of 10 900) and the people working in Finland

made up 65% of all people working abroad but residing in Estonia (16 200 out of 24 800). Over a short period, Finland has become a country with the largest Estonian community worldwide.

However, the ever more widespread demographic process of working abroad should not be considered characteristic to Estonia alone. Estonian demographers Puur et al (2013) agree with the authors who argue that demographic development has reached a new migration era (Castles, Miller 2008) where a new mobility paradigm is spreading (Scheller, Urry 2006) - and Estonia is in the forefront of these new developments. This means that in the increasingly integrating Europe, working or studying abroad has become common and the life of modern people often crosses national borders just like it once started to cross the birth place and community boundaries (Puur et al, 2013).

2. Intentions of Estonia's working age population to work abroad

Although the chances of working-age population to find work in Estonia have considerably improved compared to the period of economic crisis prevalent in 2010, the fact that the large generations born in the 80s are reaching their prime migration age as described in the previous chapter allows concluding that the migration potential of Estonian population will remain at a high level in the following years. As the birth rate dropped substantially in the 1990s, it can be assumed that the population's migration potential will decrease as these generations reach their migration age. Nevertheless, it should be noted that until the wages in Estonia continue to be lower than in other EU Member States, the workforce will continue to be highly motivated to work abroad. The large number of people leaving Estonia to work abroad and the continuing high migration potential should be contemplated in the context of the neoclassical macroeconomic theory. Krusell

(2013) has summarised the essence of the neoclassical macroeconomic theory according to which the labour market variables like financial welfare, unemployment and wages are the main drivers behind migration and these can be regulated only by means of government intervention. Russell (1995) believes that the reason for workforce mobility is wage difference between countries which stems from the difference between the supply and demand of labour.

2.1 Intent to work abroad

In 2010, the migration potential of Estonia's working-age population increased considerably compared to 2006. In 2006, the migration potential amounted to 3,9%, but in 2010 this value rose to 8,5% due to the difficult situation on the labour market. In 2013, the migration potential has decreased compared

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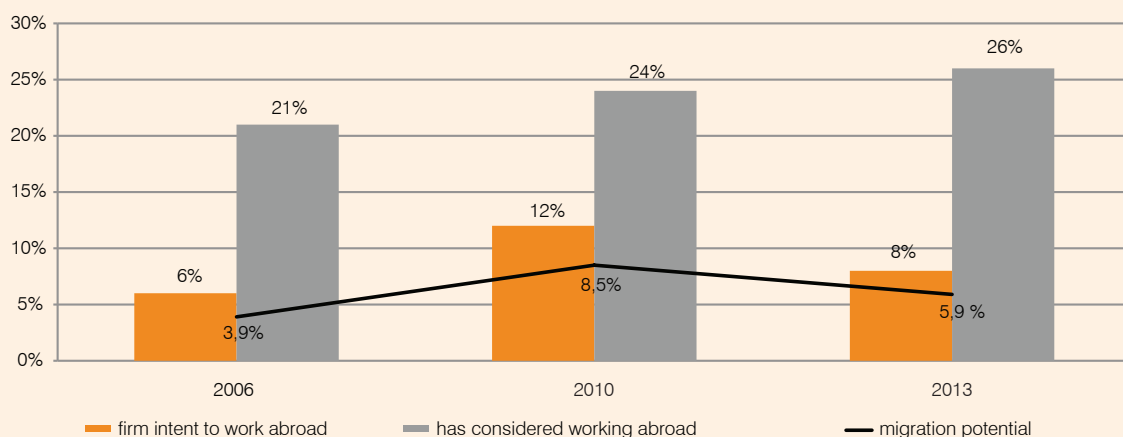
to 2010. The 2010 survey indicated that the migration potential of Estonia's working-age (aged 15-64) population was estimated to be 8,5%, i.e. about 76 400⁵ working-age persons had made preparations and firmly intended to work abroad, but this survey reveals that in 2013 the migration potential was 5,9%. This means that 51 600 working-age people have made preparations and firmly intend to work abroad.

Figure 2 which shows the working-age population's general intentions of working abroad demonstrates that in 2013 these have remained more or less on the same level as in 2010. In 2010, 36% of Estonia's working-age population certainly planned to work abroad

or had considered it, but in 2013 this figure was 34% (in comparison, this indicator was 27% in 2006). The results for 2013 reveal that compared to 2010 the number of people certainly planning to work abroad has dropped.

The 2013 Eurobarometer Survey (European Commission 2013) yielded a similar result - 36% of Estonia's population considered working abroad. Although the proportion of Estonians intending to work abroad is relatively high compared to the average in Europe, the Eurobarometer Survey (European Commission 2013) indicates that Sweden, Croatia and Slovenia display higher rates (54%, 43% and 39% of the population would like to work abroad, respectively).

Figure 2. Estonian residents intending to work abroad and migration potential, 2006, 2010, 2013



Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

In line with the decrease in the migration potential of working-age population, the number of people who intend to work abroad and have made preparations to that end has dropped. In 2006, 49% of people intending to work abroad claimed that they have made preparations for working abroad, and by 2010 the share of such persons rose to 56%, but in 2013 only 43% of those intending to work abroad had made preparations to that end. A more detailed analysis of the results indicates that among people who have made preparations are some who have made spe-

cific preparations (applied for a job, studied a language, examined the accommodation options, etc) – in 2013, the share of such people was greater than in 2010. In 2013, 44% of all people who made preparations had made specific preparations, whereas in 2010 this figure was 35%. This allows concluding that although in 2013, compared to 2010, there are less such people who have made preparations among those intending to work abroad, the people who made preparations were much more specific in their doings.

⁵ The absolute values for migration potential in 2006 and 2010 have somewhat changed compared to the previously published data because Statistics Estonia retrospectively adjusted the size of population in 2000-2013 based on two censuses and data from registers which entailed an adjustment in the number of working-age people.

2.2 Firmness and awareness of working abroad

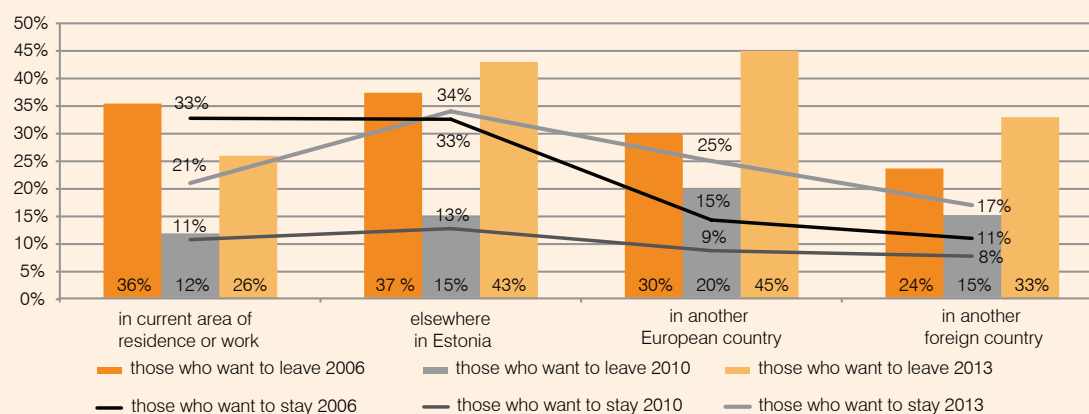
Based on the neoclassical macroeconomic theory, one of the reasons why people wish to work abroad might be unemployment. In 2010, the lack of suitable work remarkably influenced the intent of Estonia's working-age population to work abroad, but over the past three years the situation on the labour market has improved and in this context the Estonian people's optimism as regards finding a job has improved (see Figure 3). In 2010, only 15% of people wishing to work abroad believed that they would certainly be able to find a job in Estonia which meets their qualifications, but by 2013 this figure had risen to 43%. Likewise, the number of people intending to work abroad who believe that they would be able to find a job which meets their qualifications both in a European country or outside Europe has increased. Hence, the conclusion is that Estonian residents are more self-confident than ever before about being able to find work abroad.

Overall, in 2013 the people wishing to work

abroad believed that their chances of finding work in Estonia are better than in 2010. However, the share of Estonian people who believed that they would find a job which meets their qualifications in the region where they currently live or work increased somewhat less. In 2010, 12% of people wishing to work abroad and 11% of people wishing to stay in Estonia believed that they would find a job which meets their qualifications in the region where they currently live or work, but in 2013 the figures were 26% and 21%, respectively. Nevertheless, Figure 3 shows that in 2006 people were more optimistic about finding work in the region where they currently live or work than in 2010 and 2013. The results of the last survey indicate that people who intend to work abroad and live in Tallinn are much more convinced (36%) that they would be able to find a job which meets their qualifications in the region where they currently live or work, compared to those living in the rural area (16%). Furthermore, Estonians intending to work abroad are more convinced (28%) than non-Estonians (20%) that they would be able to find a job which meets their qualifications in the region where they currently live or work.

Over the past three years the situation on the labour market has improved and in this context the Estonian people's optimism as regards finding a job has improved.

Figure 3. Would you certainly be able to find a (new) job which meets your qualifications? 2006, 2010, 2013



Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

In parallel with the growing certainty in finding a job meeting the qualifications abroad, the Estonian population's awareness of the opportunities of working abroad has in-

creased. In 2010, 47% of people who had a firm intention or who had considered working abroad believed that they are very well or quite well informed of the opportunities of

finding a job abroad, but in 2013 57% of people intending to go abroad found that they are very well or quite well informed. In 2013, 33% of all people wishing to work abroad believed that they don't need any information about the opportunities of working abroad, whereas in 2010 this indicator was 21%. In 2010, people felt the greatest need for information on wages and vacancies (24%), but in 2013 those intending to work abroad maintained that what they need most is information on documents and administrative procedures (19%).

Estonians - compared to non-Estonians - are much more aware of the opportunities of working abroad. In 2013, 65% of Estonians wishing to work abroad believed that they are very well or quite well aware of the opportunities of working abroad, but among the non-Estonians this figure amounted to 39% only. 40% of Estonians found that they don't need any information about working abroad, whereas only 19% of non-Estonians wishing to work abroad were of the same opinion. Non-Estonians (16%) feel much more than Estonians (4%) that they are lacking information on working conditions or the nature of work.

2.3 Preferred duration of working abroad and destination countries

Over the recent years, the number of people intending to work abroad for more than a year or remain abroad permanently after finding work there has notably increased.

Working abroad is temporary, i.e. people working abroad but residing in Estonia should not be considered as permanently emigrated. However, working abroad might facilitate migration decisions, i.e. the persons working abroad could decide to start living there permanently. Therefore, it is essential to find out the intended duration of working abroad.

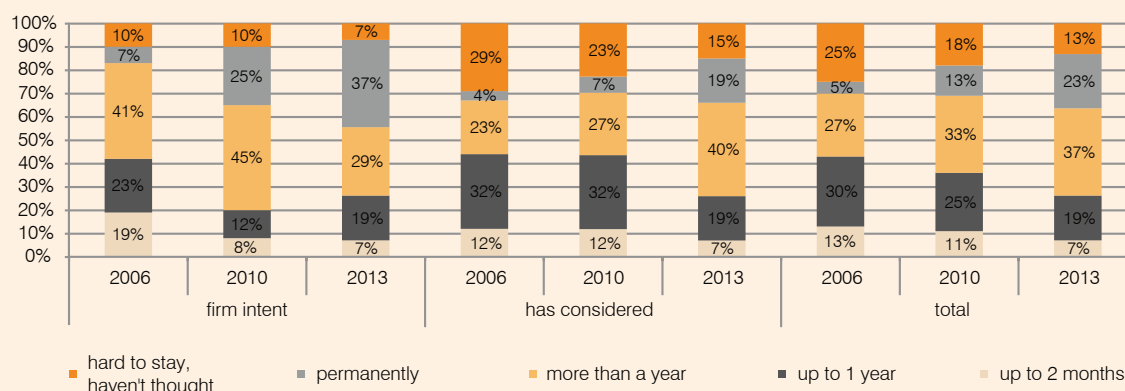
Figure 4 shows that the share of people in-

tending to go abroad temporarily has dropped among those wishing to work abroad. In 2006, 43% of people wishing to work abroad stated that they would like to work abroad for up to one year, whereas by 2010 this figure decreased to 36% and dropped to 26% in 2013. Therefore, over the recent years, the number of people intending to work abroad for more than a year or remain abroad permanently after finding work there has notably increased. In 2010, as compared to 2006, the intent to work abroad for more than a year increased by 6 percentage points, and in 2013, as compared to 2010, by a further 4 percentage points, but the intent to remain abroad permanently after finding work there has grown even faster. In 2013, 23% of people wishing to work abroad stated that they would like to remain abroad permanently.

It is alarming that the share of people wishing to go and work abroad permanently is greater among those Estonian residents who express a firm intention to work outside Estonia. Consequently, 37% of people with a firm intention to work abroad believed that they would remain there permanently, whereas only 19% of people who had considered working abroad but had not yet developed a firm intention believed that they would stay abroad permanently. The intent to work abroad permanently is greater among people in prime working age (25-44) and among people in the eldest age group (45-64) whereas the youth's (15-24) intentions of working abroad are of a more temporary nature. The intent to go and work abroad permanently is the greater the higher the level of education of those wishing to work abroad. Consequently, in 2013, 30% of people having the third level of education⁶ who wished to work abroad believed that they would like to remain abroad permanently whereas among people having the first level of education who wished to work abroad this figure was 11%

⁶ ISCED levels of education: level one – primary education, basic education, vocational education for young people without basic education; level two – secondary education, vocational education based on secondary education; level three – professional secondary education based on secondary education, academic education, professional higher education, doctor.

Figure 4. For how long you intend to work abroad? 2006, 2010, 2013



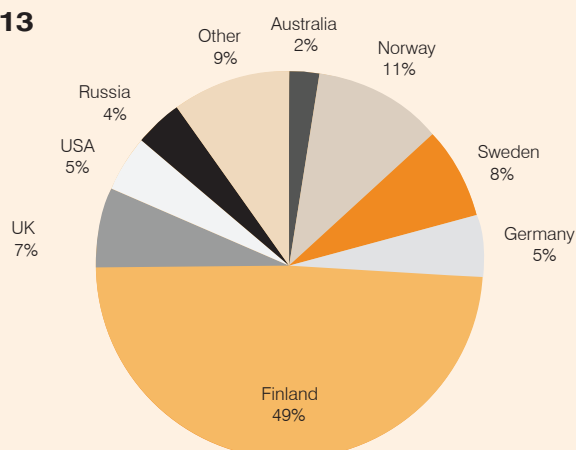
Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

Finland is the most popular destination country among people wishing to work abroad just as it is among those working abroad. Based on the ELFS data, in 2013 68% of all people working abroad worked in Finland, and Figure 5 shows that 49% of respondents would like to work in Finland in 2013. Compared to 2010, the share of such people has increased by 6 percentage points. Finland as a potential destination country is more popular among people with a lower level of education - 59% of people having the first level of education who wish to work abroad would go to Finland whereas among people having the third level of education this figure is 39%. People wishing to work in Finland argue that

they prefer this destination country due to its good location, higher wages, familiar language and the fact that many friends and acquaintances are already there.

Finland is followed by other Scandinavian countries: 11% of people intending to work abroad would go to Norway (the same percentage as in 2010) and 8% to Sweden (7% in 2010). Compare to 2010, the popularity of the UK and Ireland as potential destination countries has dropped the most. In 2010, 12% of people wishing to work abroad preferred the UK and Ireland, but in 2013 this percentage was only 7%.

Figure 5. Countries of destination preferred by people intending to work abroad, 2013



Source: Migration Potential Survey 2013, author's calculations

2.4 Expectations related to working abroad

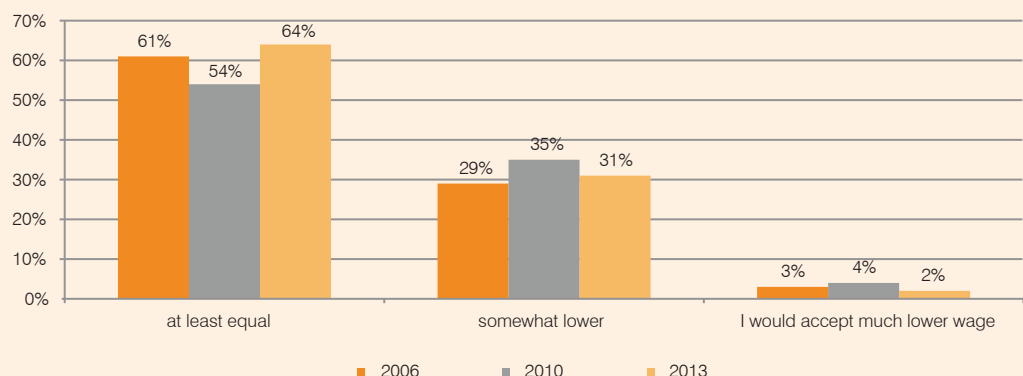
Although the migration potential of working-age population dropped in 2013, Estonian residents did not become more selective as regards working abroad (compared to earlier surveys). During the economic crisis, the employment opportunities of Estonian population deteriorated and the expectations related to working abroad were lowered and in 2013 these expectations have remained on the same level as during the crisis. Thus, still about one third (30% in 2013 and 29% in 2010) of people wishing to work abroad are willing to accept a job requiring a level of qualification which is lower than at the current or previous job. Likewise, one in five people wishing to work abroad is willing to accept any kind of work (21% in 2010 and 22% in 2013) whereas in 2006 this figure was lower (16%). Expectedly, among people with a lower educational level who wish to work abroad there are more of those willing to accept any kind of work there. Such people made up 32% of those having the first level of education who intended to go abroad, and 13% of those having the third level of education.

In 2013 those wishing to work abroad were looking to earn an average monthly net wage of EUR 1900.

However, the preferred areas of activity are not as specifically targeted as before. In 2010, 39% of people wishing to work abroad believed that they would find work in the construction sector, but in 2013 the number of such people had dropped to 23%. Likewise, there has been a cutback in the number of people believing they could find work in the accommodation and catering sector (28% in 2010 and 17% in 2013), the agriculture and forestry sector (21% in 2010 and 12% in 2013), and the transport and storage sector (15% in 2010 and 9% in 2013). Hence, construction and other popular sectors are not as dominant in the people's preferences as they used to be.

During the period of economic crisis, the Estonian population had a higher acceptance rate for lower wages whilst working abroad than the local labour, but Figure 6 indicates that along with the recovery from crisis the Estonian population's expectations to wages have increased. In 2010, 54% of people intending to work abroad maintained that for working abroad they would like to get at least equal pay compared to local labour, but by 2013 the share of such people had risen to 64%.

Figure 6. How high should be your wage whilst working abroad as compared to the wage earned by local labour? 2006, 2010, 2013



Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

Higher expectations to the wage for working abroad are reflected in the specific wage figures requested. In 2010, the Estonian residents who had a firm intent to work abroad

or who had considered working abroad stated that they would be willing to work abroad if their average monthly net wage would be EUR 1400 (median EUR 1300), but in 2013

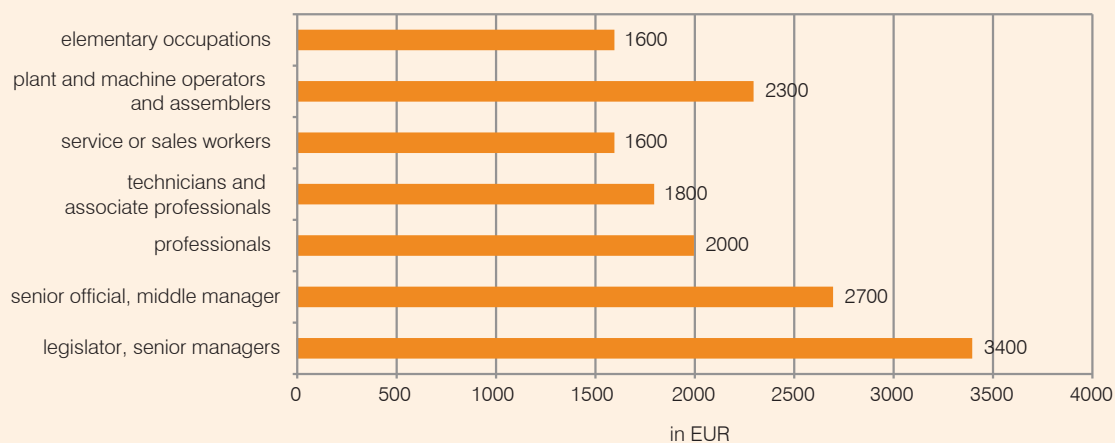
those wishing to work abroad were looking to earn an average monthly net wage of EUR 1900 (median EUR 1500). This means that in 2013 the wage expectations have increased by 36% compared to 2010. The growth of net wage in Estonia during the period 2010-2013 can be characterised by the data from Statistics Estonia: in 2010, the average net wage was EUR 637 and by the 2nd quarter of 2013 it had grown by 22% amounting to EUR 778. The results of the Migration Potential Survey indicate, however, that the Estonian population's wage expectations have grown faster than the real net wage in Estonia. Hence, it is understandable that the main reason why the Estonian population would like to work abroad is higher wage (the factors fostering emigration are detailed in Chapter 5).

Men are much more demanding than women when it comes to the expectations to the wage for working abroad, and the wage expectations of men have grown faster than those of women - compared to 2010. In 2010, men were looking to earn a net wage of EUR 1600 (median EUR 1600) for working abroad and women EUR 1100 (median EUR 1000), but in 2013 men were looking to earn 44% more or EUR 2300 (median EUR 2000) and women 27% more or EUR 1400 (median EUR 1500). In this context, it should be pointed out that in 2013 women's wage expectations related to working abroad are lower than those of men

in 2010. Furthermore, it is evident that women's wage expectations are more aligned with the growth of the real net wage in Estonia in 2010-2013 whereas men's wage expectations are about 2 times higher than the growth of the real net wage.

Expectations to the wage for working abroad do not vary by educational level or nationality, but the wage expectations of the youth are lower than in other age groups. In 2013, the 15-24-year-olds were looking to earn a net monthly wage of EUR 1600 (median EUR 1200) for working abroad whereas the age group 25-44 were looking to earn EUR 2000 per month (median EUR 1800) and the age group 45-64 expected to make EUR 1800 per month (median EUR 2000). Likewise, the people intending to work abroad differ by wage expectations based on their current or past occupation in Estonia - the higher the occupation group, the greater their wage expectations related to working abroad. Figure 7 shows that people intending to go abroad who work as legislators or senior managers would like to earn an average monthly net wage of EUR 3400 whereas the service or sales workers are looking to earn a monthly net wage of EUR 1600. Among other occupations, people working as plant or machine operators or motor vehicle drivers stand out a bit as their wage expectations are higher than those of professionals.

Figure 7. Last occupation and the average monthly net wage for working abroad requested by people wishing to work abroad, 2013



Source: Migration Potential Survey 2013, author's calculations

3. The socio-demographic profile of people wishing to work abroad

The intent to work abroad may vary across population groups. To get a better idea of the profile of people intending to work abroad it is important to determine their gender and age related characteristics, their nationality and household type, and provide an overview of their educational and skill level. The following chapter provides a detailed insight.

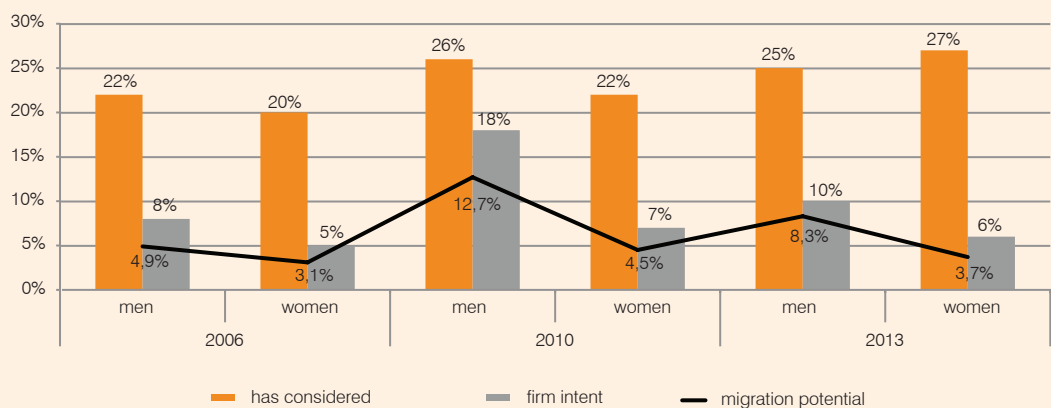
3.1 Gender

The economic crisis did not notably affect the women's intentions to work abroad. Therefore, the migration potential of women has fluctuated less than that of men in 2006-2013.

The registered migration statistics reveals that the slight majority of people emigrating from Estonia are women whereas according to the ELFS most of the people working abroad but residing in Estonia are men. Hence, it leads to the conclusion that men's employment abroad is more of a temporary nature whereas women are more prone to live abroad permanently than men.

Figure 8 shows that in 2006, before the economic crisis, the migration potential of women and men did not differ much, but by 2010 it increased considerably more among men than among women. Because the economic crisis led to the contraction of industries where male labour was dominant (construction, manufacturing), men started to look for work abroad as suitable jobs were not available in Estonia. On the other hand, the economic crisis did not notably affect the women's intentions to work abroad. Therefore, the migration potential of women has fluctuated less than that of men in 2006-2013. The migration potential of men or the number of men who had a firm intent to work abroad and had made the relevant preparations dropped from 12,7% in 2010 to 8,3% in 2013, but the migration potential of women decreased much less – from 4,5% to 3,7%.

Figure 8. People looking to work abroad and migration potential by gender, 2006, 2010, 2013



Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

In 2013, the share of women and men looking to work abroad who intend to work abroad for a longer period, i.e. over a year, has increased. Among all men looking to work abroad the share of men looking to work abroad long-term has grown from 48% in 2010 to 62% in 2013, and for women the growth has been from 43% to 58%. Among men looking to

work abroad, the most popular target sector - as expected - is construction (42%), followed by manufacturing (18%), and transport and storage (16%). Women, on the other hand, would prefer to work abroad in the accommodation and catering sectors (29%), other service sectors (20%), and the sectors of healthcare and social welfare (15%). Thereat,

men's expectations to employment abroad are higher than those of women, i.e. men as compared to women would much more like to have a job requiring at least equivalent qualification and skill level as in Estonia. This was stated by 52% of men and 37% of women who wish to work abroad. Although, in absolute numbers, women's expectations to the salary earned abroad are smaller than for men, somewhat more women (69%) than men (62%) believe that whilst working abroad their salary should be at least equal to that earned by the local population.

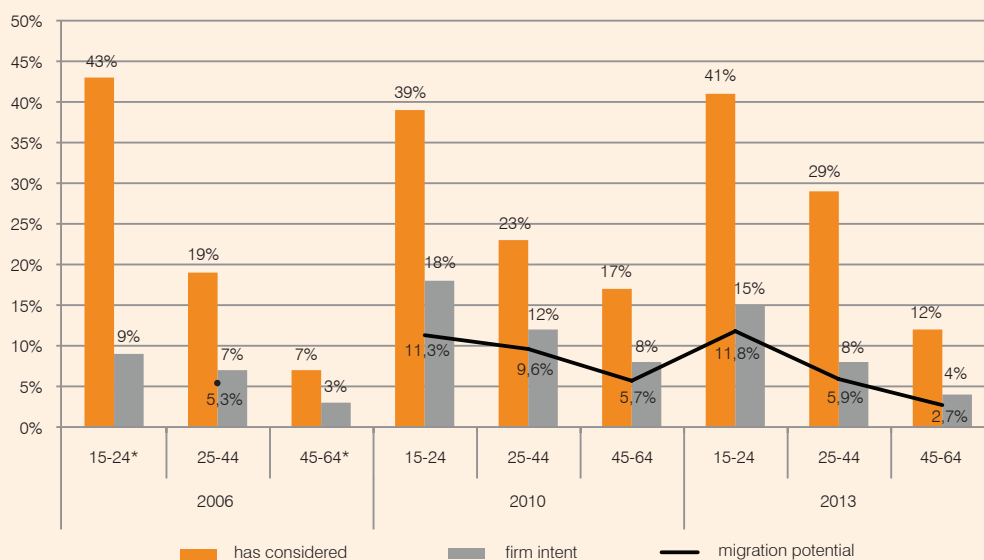
In 2010, somewhat more men (44%) than women (35%) who were looking to work abroad preferred to work in Finland, but in 2013 Finland was equally the most popular destination country among men (44%) and women (44%) followed – regardless of gender – by other Scandinavian countries. However, the UK as a destination country of labour migration was much more popular among women (8%) than among men (3%) - being ranked second among women. The higher wage level as the main reason behind the selection of destination countries is somewhat more important among men (57%) than among women (46%).

3.2 Age

Younger people have always been more mobile on the labour market than other age groups. Hence, it is no surprise that more and more often the youth prefer to work abroad. According to the ELFS, in 2012 an average of 3400 young people (aged 15-24) work abroad, which is even a bit more than during the economic crisis (in 2010, there were 3100 young people working abroad). Thus, living and working abroad has gained popularity among Estonian youth making it no surprise that the age group 15-24 features the highest rate of those looking to work abroad. Compared to 2010, the migration potential or the number of people who have a firm intent to work abroad and have made preparations to this end has dropped among people in their prime working age and in the eldest age group, but among 15-24-year-olds the migration potential has remained the same or even grown a bit. Notably, the share of youth who have made specific preparations for working abroad, e.g. applied for a job, studied a language, etc has increased. In 2010, 19% of 15-24-year-olds wishing to work abroad had made specific preparations, but in 2013 the figure was 24%.

Age group 15-24 features the highest rate of those looking to work abroad.

Figure 9. People looking to work abroad and migration potential by age, 2006, 2010, 2013



* In 2006, the survey sample in these target groups was not large enough to represent migration potential.

Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

In 2013, the plans of people looking to work abroad are much more long-term in all age groups compared to 2010. It is somewhat surprising that people aged 45-64 are planning to work abroad long-term. Specifically, 70% (47% in 2010) of people aged 45-64 looking to work abroad think that they would like to stay abroad for more than a year whereas the same indicator in the 25-44 age group is 60% (49% in 2010) and 55% among 15-24-year-olds (42% in 2010).

The youth would prefer to work abroad in sectors which provide seasonal jobs. So, one in four young people intending to work abroad prefers to work in the accommodation or catering sector. Likewise, construction (17%), other service sectors (15%) and agriculture (13%) are popular sectors among the youth. 25-44-year-olds would prefer to work in the sectors of construction (27%) and manufacturing (19%), and 45-64-year-olds would like to work in the sectors of construction (20%) and healthcare and social welfare (13%). More than half (52%) of 45-64-year-olds looking to work abroad would prefer working in Finland whereas nearly one in three (33%) young people looking to work abroad would like to work in Finland. The USA is a popular destination country of labour migration among the youth as opposed to other age groups – 11% of all young people looking to work abroad would like to go to there.

3.3 Nationality

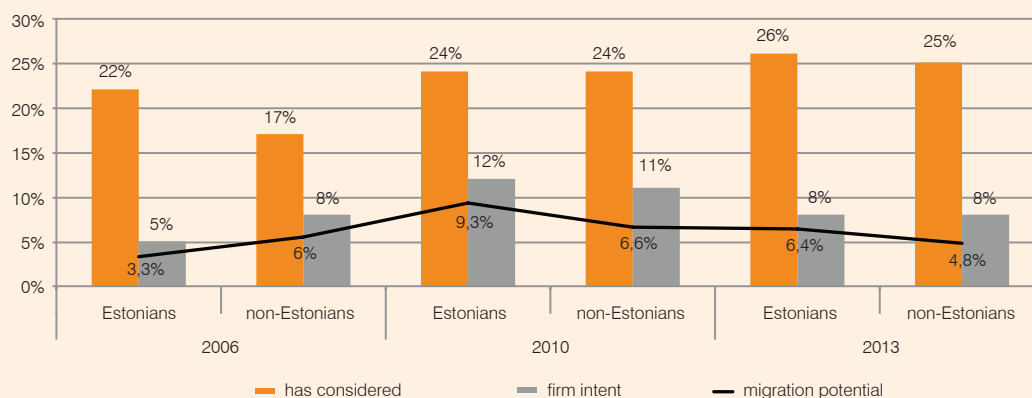
The situation of non-Estonians on the Estonian labour market is more complicated than for Estonians, which on the one hand could contribute to their employment abroad, but on the other hand the labour market, which opened following the EU accession, might not be such a facilitating migration factor for non-Estonians as it is for Estonians. The reason is that non-Estonians feature the highest share of people without Estonian citizenship

which limits their freedom of movement within the EU as compared to Estonians. According to the ELFS, in 2010-2012, non-Estonians made up approximately 20-25% of all people working abroad and about 30% of all people employed in Estonia. Further, the share of Estonians working abroad among Estonian workforce is greater than the share of non-Estonians working abroad among non-Estonian workforce. In 2012, Estonians working abroad made up 3,9% of all Estonian workforce and non-Estonians working abroad made up 2,8% of all non-Estonian workforce.

Figure 10 shows that the migration potential of non-Estonians exceeded the migration potential of Estonians immediately following the EU accession and prior to the economic crisis, i.e. in 2006. During the economic crisis - in 2010 - the migration potential or the number of people who had a firm intent to work abroad and had made preparations to that end increased considerably among Estonians whilst the increase was smaller among non-Estonians. The results of the ELFS allow stating that during the economic crisis working abroad increased among Estonians, but the crisis did not affect the number of non-Estonians working abroad to the same extent. In 2008 - according to the ELFS - 11 200 Estonians and 4500 non-Estonians worked abroad, whereas by 2010 the number of Estonians working abroad rose to 16 900 and the number of non-Estonians dropped to 4200.

As for the results of the Migration Potential Survey, Figure 10 indicates that in 2013 Estonians and non-Estonians featured an equivalent number of people looking to work abroad (34% and 33%, respectively), but the migration potential of Estonians (6,4%) somewhat exceeded that of non-Estonians (4,8%) due to the fact that Estonians had made more preparations for working abroad than non-Estonians.

Figure 10. People looking to work abroad and migration potential by nationality, 2006, 2010, 2013



Source: Migration Potential Surveys in 2006, 2010 and 2013, and author's calculations

Both in 2010 and 2013, willingness to work abroad was higher among non-Estonian youth than Estonian youth, but in other age groups the Estonians' and non-Estonians' intentions of working abroad are not differentiated. In 2010, 60% and in 2013 64% of non-Estonian youth had considered working abroad or had a firm intent, but among Estonian youth these indicators amounted to 55% in 2010 and 54% in 2013. The conclusion that non-Estonian youth are more interested in emigrating has been drawn in an earlier survey „Graduates and their career choices“ (Mägi & Nestor 2012) which revealed that one third of youth graduating from a Russian-speaking upper secondary school intend to continue their studies outside Estonia. Although in that case studies are the driver motivating the youth to go abroad instead of work, the survey implied that young non-Estonians might be looking to go abroad due to a certain degree of disappointment with the life in Estonia and the lack of career prospects in Estonia.

In 2010, Estonians and non-Estonians featured an equivalent share of persons looking to work abroad for more than a year when taking up employment there (48% among Estonians and 46% among non-Estonians), but in 2013 Estonians planned to work abroad longer than non-Estonians. 63% of Estonians looking to work abroad - compared to 54% of non-Estonians – maintained that they would like to stay abroad for more than a year when

taking up employment there.

Estonians - as opposed compared to non-Estonians - prefer more to work abroad in the sectors of accommodation and catering (19% vs. 12%), agriculture (14% vs. 5%), other service sectors (14% vs. 9%), and art and entertainment (8% vs. 1%), whereas non-Estonians prefer more to work in the sectors of construction (27% vs. 21%) and finance and insurance (6% vs. 1%). There are no substantial differences between Estonians and non-Estonians as regards the preferred destination countries for working abroad. Although for Estonians as well as non-Estonians the primary reason for working abroad is the higher salary level, for non-Estonians - as compared to Estonians - more important factor in choosing the destination country is the ease of finding suitable work (17% vs. 6%), whereas for Estonians the more important factor is proficiency in the language of the destination country (22% vs. 14%).

3.4 Household type

The existence of children might considerably influence the willingness to work abroad. On the one hand, children could be an obstacle to working abroad because parents need to solve the issue of caring for their child/children whilst working abroad. On the other hand, the existence of children could foster working abroad because maintenance of children is expensive and the chances of earning

Willingness to work abroad was higher among non-Estonian youth than Estonian youth.

more are higher abroad than in Estonia. As the main reason for Estonia's working-age population taking up employment abroad is the need to earn more, it might be related to having a larger family.

In 2013, compared to 2010, the number of Estonian residents who would take along their spouse/cohabitee and/or children when going to work abroad has considerably increased. Since the Estonian residents' plans of working abroad have become more long-term, it is evident that they want to take their families with them when taking up long-term employment abroad. In 2010, 20% of all people looking to work abroad would take along their spouse/cohabitee and 11% their child/children, but in 2013 the respective figures are 31% and 28%. In this context, 63% of all Estonian residents having a firm intent to work abroad or having considered working abroad have at least one child. 44% of the said persons would take up employment abroad accompanied by their child/children and 56% would leave their child/children in Estonia. Of all children to be left in Estonia, 63% would be entrusted to the spouse/cohabitee of the person going abroad and 28% to the parents or grandparents of the person going abroad. As for 9% of the children, they would be entrusted to relatives or friends/acquaintances, or the parents have not yet thought about this issue.

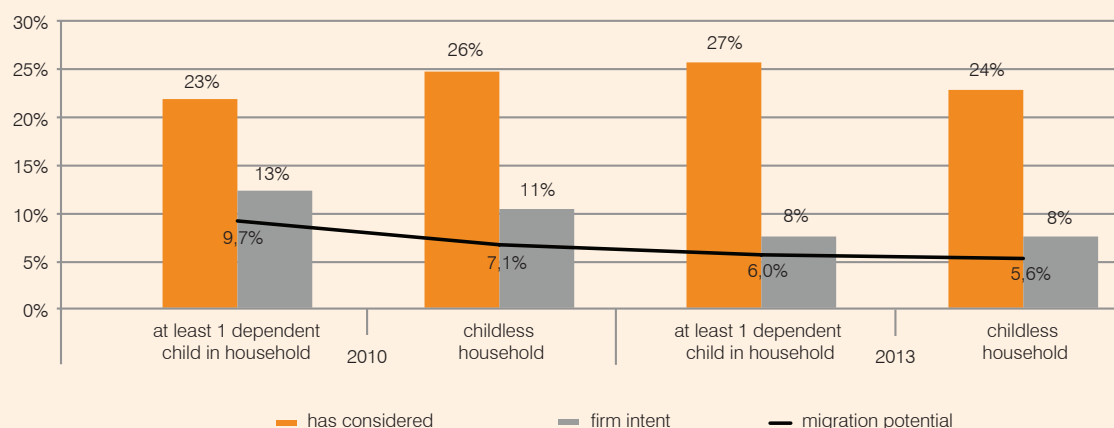
However, with regard to the issue of caring for children whilst working abroad, the survey revealed that in reality 94% of working-age population who have worked abroad left their child/children in Estonia whilst working abroad. 70% of all children left in Estonia were cared for by the spouse/cohabitee of the person working abroad and 30% were cared for by the parents/grandparents, relatives, friends/acquaintances of the person working abroad, or by someone else, or the parents thought that the child can manage

on his own. This allows concluding that people's willingness to take their child/children along when taking up employment abroad is actually greater than the current practice indicates, i.e. parents are often unable to take their children along and so they are entrusted to a spouse or cohabitee. On the other hand, in 2013 17% of parents who had worked abroad stated that they visited Estonia at least once a week whilst working abroad whereas in 2010 the figure was only 7%. Hence, it can be concluded that although parents don't often manage to take their minor child abroad with them, they visit their child in Estonia more frequently than before. Furthermore, it is notable that in 2013 almost half of the parents maintained that they communicated with their children almost every day whilst working abroad.

As regards the existence of children affecting the willingness to work abroad Figure 11 shows that in 2010 and 2013 the number of Estonian residents who have considered working abroad or have a firm intent to do so has remained relatively consistent regardless of whether or not the household of the person looking to go abroad includes children. However, it can be distinguished that the migration potential or the number of people who have a firm intent to go abroad and have made relevant preparations peaked in 2010 among people whose household included at least one minor child. This means that among people with children were more of those who had a firm intent to go abroad and had made relevant preparations. Thus, it can be concluded that the economic crisis and the resulting difficulties on the labour market contributed to taking up employment abroad among Estonian residents who had to ensure their subsistence as well as the welfare of their children, but by 2013 the migration potential in households with or without children has evened out.

In 2013, compared to 2010, the number of Estonian residents who would take along their spouse/cohabitee and/or children when going to work abroad has considerably increased.

Figure 11. People looking to work abroad and migration potential by household type, 2006, 2010, 2013



Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

3.5 Educational level

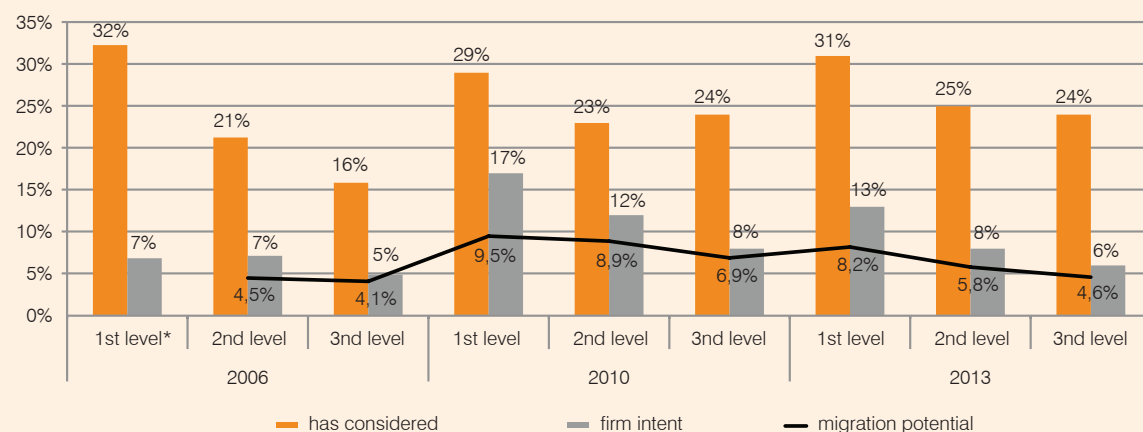
In the context of emigration and working abroad, specific attention has been paid to the educational and skill level of emigrants as it is closely linked to the so-called brain drain issue. In sending countries, the major emigration-related concern is that persons with a higher qualification level are those who take up employment abroad which results in a deficit of highly qualified workforce in the sending country. In this connection, however, it has been pointed out (Wickramasekara 2008) that the rules obstructing migration above all affect the mobility of people with a low qualification and educational level which allows believing that prior to EU accession the said population groups had more difficulties in finding work abroad. Thus, joining the single European labour market should foster employment abroad among people with a lower educational level and have a lesser effect on the mobility of highly qualified and educated labour. Anniste et al (2012) used regression analysis to determine that after EU accession the likelihood of emigration of Estonian working-age population with a lower education level is higher than that of people with a higher educational level. This means that people with a lower educational level are more likely to emigrate than people who are highly educated. This is supported by the migration statistics according to which the number of emigrants

without higher education increased after Estonia acceded to the EU. To find out whether the majority of Estonian residents looking to work abroad have a lower educational level it is essential to examine the results of the Migration Potential Survey.

Figure 12 shows the people looking to work abroad and the migration potential by educational level indicating that on all educational levels the number of people who have considered working abroad or have a firm intent to do so has dropped by a few percentage points. It should be noted that the decrease has been greater in migration potential or among people who have a firm intent and have made preparations for working abroad. The drawing demonstrates that the migration potential has dropped most among people having the second level of education (3,1 percentage points) and the third level of education (2,3 percentage points). Therefore, the share of residents intending to work abroad and residents with migration potential in 2013 is still the highest among persons with a lower educational level and the lowest among those with higher education - this is in line with the conclusion drawn by Anniste et al that people with a lower educational level are more likely to emigrate from Estonia. With reference to the said data it cannot be argued that in the next few years Estonia is facing a disproportionately high rate of brain drain.

The share of residents intending to work abroad and residents with migration potential in 2013 is still the highest among persons with a lower educational level.

Figure 12. People looking to work abroad and migration potential by educational level, 2006, 2010, 2013



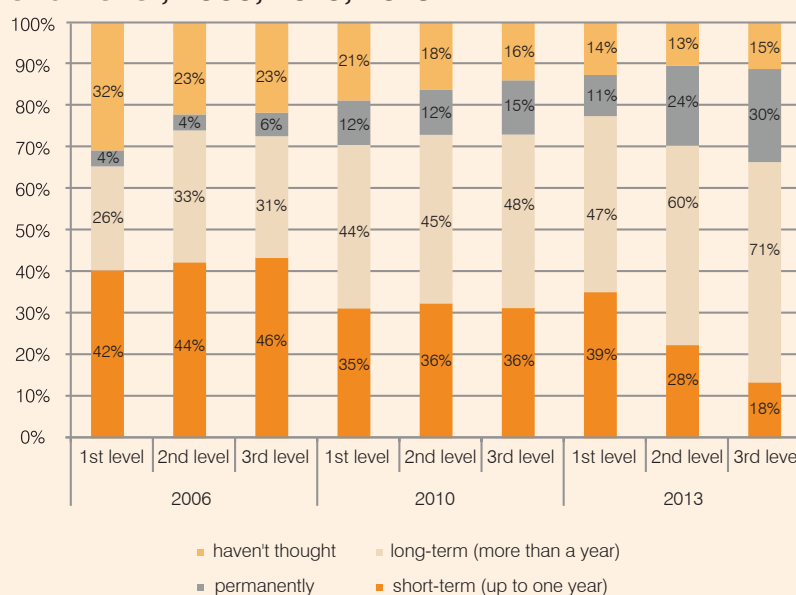
* In 2006, the survey sample in this target group was not large enough to represent migration potential.

Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

However, putting the intent to work abroad on a time-scale reveals a concerning tendency. In 2010, people with long-terms plans of working abroad were distributed quite evenly between educational levels, but Figure 13 indicates that in 2013 the share of people who plan to work abroad long-term or for more than a year has considerably increased among residents looking to work abroad who have second or third level education. Likewise, the number of people looking to work abroad and stay there permanently has increased among persons with second or third level education. 24% of people with sec-

ond level education and 30% of people with third level education who intend to work abroad believe that they would stay abroad permanently. On the other hand, the intentions of working abroad long-term have not considerably increased among people with first level education as compared to 2010. Hence, it can be concluded that although the migration potential among people with second and third level education has somewhat decreased, the persons intending to take up employment abroad would stay there longer than in the previous years.

Figure 13. People looking to work abroad long-term or short-term by educational level, 2006, 2010, 2013



Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

A more detailed analysis reveals that among people with first level education the most popular sectors for taking up employment abroad are construction (33% think they could find work in that sector), followed by accommodation and catering (23%) and agriculture (18%). Similarly, among people with second level education the most popular sector is construction (22%), followed by accommodation and catering (18%), and manufacturing (16%). Construction (16%) is the most popular sector even among people having the third level of education who presume that they would find a job in that sector abroad. As a distinction, the second and third most popular sectors among people with third level education are education (15%) and healthcare and social welfare (12%). A comparison between the preferred sectors of employment of people looking to work abroad in 2013 and the preferences recorded in 2010 reveals that the preferences of people with third level education are now much more evenly distributed between sectors - no longer focusing specifically on seasonally active sectors (construction, agriculture, accommodation and catering). This means that Estonian residents with higher education looking to work abroad are not so willing any more to work in sectors offering random employment which might be more lucrative than in their homeland but do not meet their qualifications. In 2010, 19% of people with third level education looking to work abroad claimed that they would be willing to accept any work abroad, but by 2013 their share had dropped to 13%.

As expected, regardless of the level of education, the most popular destination country for working abroad is Finland. However, the number of people with a low level of education looking to work in Finland has substantially grown compared to 2010. In 2010, 43% of people with first level education looking to work abroad stated that they would prefer to work in Finland, but by 2013 their share had risen to 59%. As the popularity of Finland

has grown among people with a low level of education, their willingness to work in Russia and the UK has lessened.

3.6 Occupational groups

According to the labour market index of the Lausanne International Institute for Management Development (IMD), Estonia is placed among the last countries in the ranking for the availability of workforce as estimated by corporate executives. The problems highlighted include the low availability of skilled labour, the lack of employees with financial knowledge, the lack of competent executives, the risk of brain drain, and low attractiveness for foreign skilled labour. Therefore, the Migration Potential Survey should examine the skill level of people looking to work abroad as the greater willingness of skilled labour to work abroad directly affects the availability of qualified labour in Estonia.

Figure 14 shows the people looking to work abroad who are currently or have been employed in the last 12 months⁷ by occupational groups revealing that in 2013 the share of people with a firm intent to work abroad or who have considered doing so is the highest among skilled labour. On the other hand, skilled labour is the only occupational group where the willingness to work abroad has dropped compared to 2010. This allows concluding that albeit skilled labour has the highest willingness to work abroad among occupational groups the overall cutback in taking up employment abroad is attributable to skilled labour. In contrast, in 2013 the share of people looking to work abroad has increased by a few percentage points among office staff/officers and people doing elementary occupations (from 25% to 29% and from 27% to 31%, respectively). Among specialists and managers the share of working-age population intending to work abroad has remained on the same level (28%) compared to 2010. Although the number of skilled labour

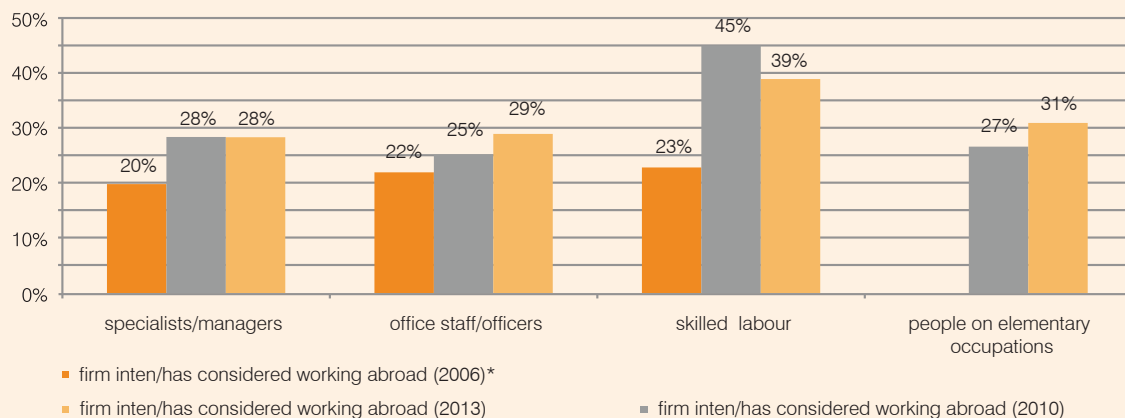
⁷ The analysis provided in this Chapter excludes people looking to work abroad who have not been employed in the last 12 months but are planning to take up employment in the future.

Skilled labour is still the group with the highest share of persons intending to work abroad.

looking to work abroad has dropped in 2013 compared to 2010, skilled labour is still the group with the highest share of persons intending to work abroad which allows con-

cluding that the problem of finding skilled labour could become more and more aggravated in Estonia due to their high migration potential.

Figure 14. People looking to work abroad by occupational groups⁸, 2006, 2010 and 2013



* In 2006, the survey sample among people working on positions requiring a low level of qualification was not large enough to allow compiling results.

Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

As to the preferred sectors for taking up employment abroad, the 2013 survey results indicate that the sectors where blue-collars⁹ are typically active (construction, wholesale and retail, manufacturing, accommodation and catering) have become less popular among white-collars¹⁰. When the economic crisis peaked in 2010, white-collars were more willing than now to work in sectors normally employing blue-collars. For example, in 2010 28% of specialists and managers were hoping to get a job in the construction sector, but in 2013 this number was 15%. On the other hand, in 2013 the education sector (15%) has become equally popular among specialists/managers – this leads to the conclusion that as regards working abroad the white-collars have become more selective than during the economic crisis.

In 2013, the blue-collars feature a much lower share of people looking to work in the sectors of agriculture, forestry and fishing. In 2010, the said sectors were attractive for 23% of skilled labour and 28% of people doing elementary occupations, but in 2013 these numbers were only 11% and 20%, respectively. Along with agriculture, the sectors of construction, transport/storage, and accommodation and catering have become less popular among blue-collars. An interesting observation can be made about skilled labour: manufacturing has caught up with the popular construction sector (construction was preferred by 38% and manufacturing by 27% of skilled labour). Nevertheless, it should be underlined that both in 2010 and 2013 the skilled labour occupational group features the highest share of people looking

⁸ The occupational group “specialists/managers” includes: managers, senior officials, middle managers, professionals and technicians; and associate professionals. The occupational group „office staff/officers“ includes: office staff and service or sales staff. The occupational group „skilled labour“ includes craft and related trades workers, plant and machine operators and assemblers; drivers and mobile plant operators. The function group “people on elementary occupations” includes only people working on elementary occupations.

⁹ Blue-collars are people in the occupational groups “skilled labour” and “people doing elementary occupations”.

¹⁰ White-collars are people in the occupational groups “specialists/managers” and “office staff/officers”.

to work abroad who would accept a job requiring at least equivalent qualification and skill level. To be specific, in 2013 55% of skilled labour looking to work abroad argued that they would accept only a job requiring at least equivalent qualification, whereas this number was 44% among specialists/manag-

ers. Hence, it can be concluded that albeit specialists/managers have become more selective towards employment abroad, skilled labour and people doing elementary occupations are more prone than white-collar to accept employment abroad only if it meets their qualifications.

4. Professional background of people looking to work abroad

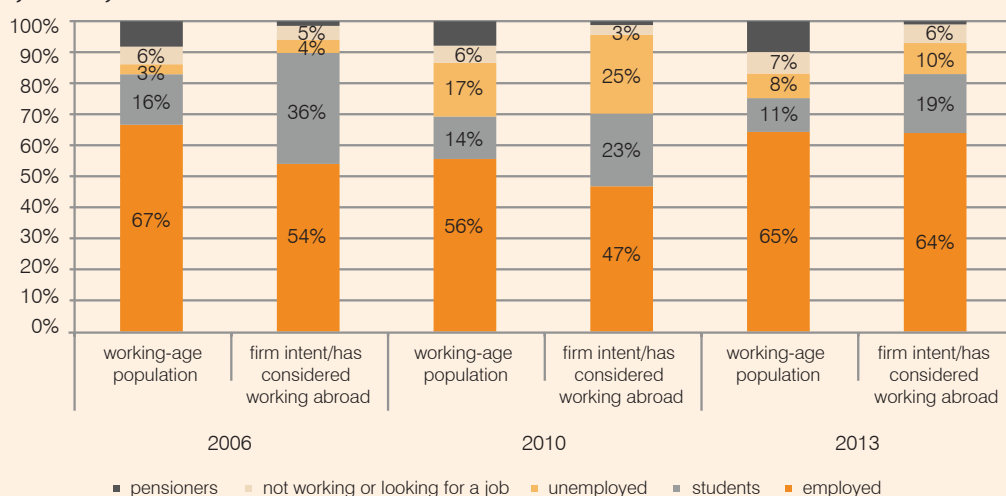
Besides the fact that the intent to work abroad might vary across population groups, the decision to take up employment abroad is certainly affected by the persons' professional background. In this connection, the decisive factors could include: (a) whether or not the working-age resident is employed; (b) if yes, the level of satisfaction with the current job; and (c) the economic sector the resident is employed in. The following Chapter aims to provide an overview of the professional background of Estonian residents seeking employment abroad.

4.1 People looking to work abroad by labour market status

In 2010, people who had lost their jobs during the economic crisis were more willing to work abroad than in 2013 when the labour market was recovering. In 2010, one in four Estonian residents looking to work abroad was unemployed, but in 2013 unemployed people made up 10% of all people intending to emigrate, which – based on this survey – is proportionate to their share in total population. This has contributed to the increase in the number of employed people among the working-age population as well as among people looking to work abroad – as a result, in 2013 64% of all people looking to work abroad were employed.

In 2010, one in four Estonian residents looking to work abroad was unemployed, but in 2013 unemployed people made up 10% of all people intending to emigrate.

Figure 15. People looking to work abroad by labour market status, 2006, 2010, 2013



Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

Just like in 2010, among students is the highest share of those with a firm intent to work abroad or who have considered doing so (58% in 2010 and 56% in 2013). However, the migration intentions have lessened among the unemployed in 2013. In 2010, 51% of the unemployed said that they have a firm intent or have considered working abroad, but in 2013 this variable amounted to 42%. The cutback in the migration intentions of the unemployed is supported by the fact that compared to 2010 the number of Estonian residents who had made preparations for working abroad dropped from 33% to 22% among the unemployed. Estonia's results are in line with the trends in other EU Member States. According to the recent Eurobarometer Survey (European Commission 2013), 39% of the unemployed in Europe had considered working abroad in 2013.

Compared to 2010, the amount of working-age residents looking to work abroad has remained the same among the employed (30% in 2010 and 31% in 2013), whereas people engaged in temporary employment had developed a somewhat higher willingness to work abroad. In 2010, 40% of people temporarily employed had a firm intent to work abroad or had considered doing so, but in 2013 the share of people intending to emigrate was 47% among the temporarily employed.

Likewise, the willingness to work abroad has increased among Estonian residents who are not working or looking for a job (excl. pensioners and students). In 2013, 32% of people, who were not working or looking for a job stated that they have a firm intent to work abroad or have considered it. On the other hand, only 7% of all people, who were not working or looking for a job have made preparations for working abroad which allows concluding that people, who are not working or looking for a job actually feature a considerably lower share of those effectively taking up employment abroad. Nevertheless, more attention should be paid to employing inactive people on the Estonian labour market as their willingness to work abroad has increased.

4.2 Satisfaction with current work

Satisfaction with their current work might notably affect the willingness of Estonian working-age population to work abroad. People who are currently employed or were employed in the last 12 months were asked how satisfied they are or were with the various aspects of their job. Figure 17 shows that people intending to migrate are somewhat less satisfied with their job as compared to people not intending to work abroad. Although the situation on the labour market has improved since 2010, people looking to work abroad have not become considerably more satisfied with their current work. Nonetheless, people intending to work abroad have become somewhat more satisfied with employment security, albeit this is understandable given the complicated labour market situation in 2010. In other work-related aspects the satisfaction of people intending to emigrate has even dropped somewhat or remained the same in 2013. As a result, the satisfaction gap between people looking to work abroad and people not intending to do so has increased, because in 2013 those who wish to stay in Estonia are overall more satisfied with the various aspects of their job than in 2010.

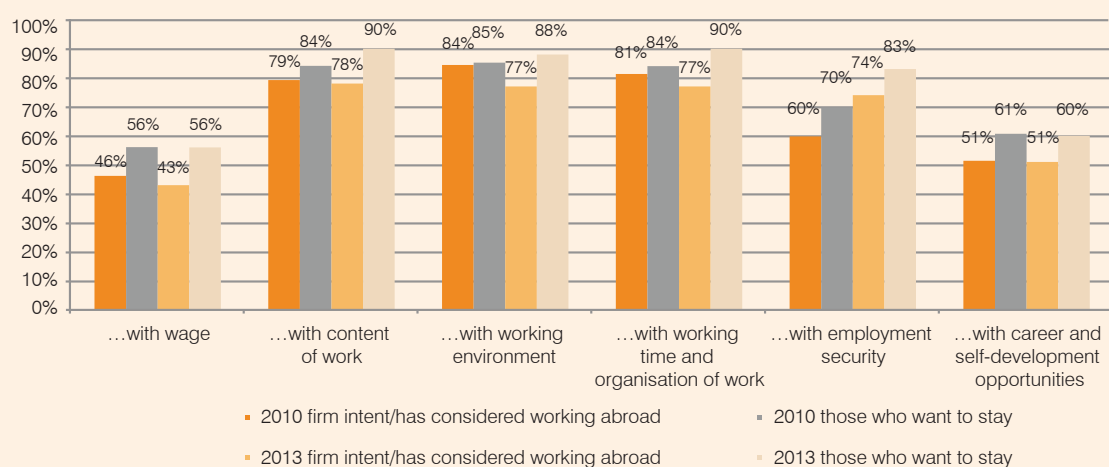
The satisfaction with their current job among people looking to work abroad and those looking to work in Estonia might be influenced by the feeling of security that they can keep their job over the following 12 months. In 2013, compared to 2010, the fear of losing their current job had lessened among labour wishing to stay in Estonia, whereas people looking to work abroad are still as convinced as in 2010 that they could lose their job in the near future. In 2010, 30% of people looking to work abroad and in 2013 29% find it very or quite likely that they will lose their job over the next 12 months, whereas 25% of people wishing to stay in Estonia were of the same opinion in 2010 and by 2013 their number had dropped to 13%. Therefore, the fear of losing the job could trigger the idea of working abroad.

In 2013, people looking to work abroad were less satisfied than in 2010 with their wage, working environment, and working time and organisation of work. The major cutback in satisfaction is related to working environment – in 2010, 84% of people looking to work abroad claimed that they are very satisfied with their working environment, but by 2013 this figure had dropped to 77%. Although one might be led to believe that people looking to work abroad are more dissatisfied with their wage than those willing

to work in Estonia, Figure 17 demonstrates that the major difference is in the content of work, working time and organisation of work. 90% of people intending to work in Estonia claimed that they are very or quite satisfied with the content of their work and 90% of them were very or quite satisfied with their working time and organisation of work, but people looking to work abroad were very or quite satisfied in 78% and 77% of the cases, respectively.

The major cutback in satisfaction is related to working environment.

Figure 16. Share of people looking to work abroad and people who intend to stay in Estonia who are satisfied or quite satisfied with the various aspects of their job, 2010, 2013



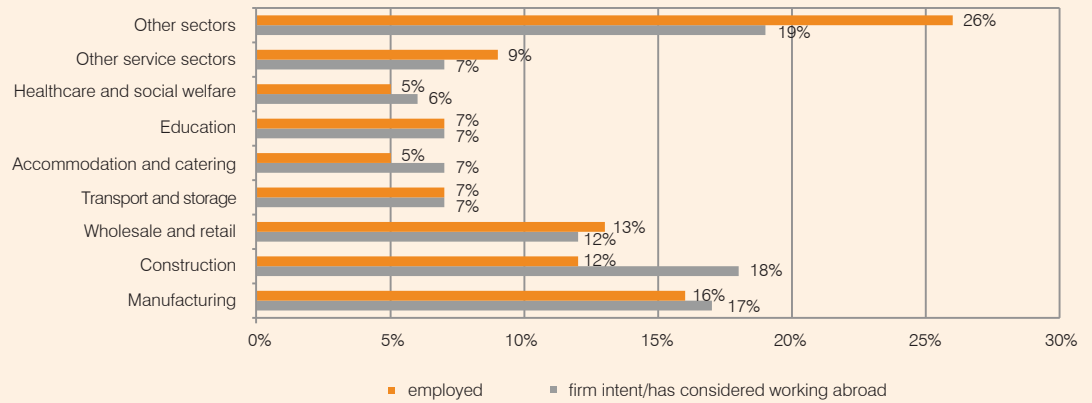
Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

4.3 People looking to work abroad by economic sectors

To determine the sectors which might be at risk of labour deficit due to Estonian residents working abroad it is essential to examine the breakdown of people looking to work abroad by economic sectors. During the economic crisis, i.e. in 2010, the Estonian residents working in the construction sector who had a firm intent or had considered working abroad made up 29% of all people planning to work abroad, but by 2013 the dominance of construction sector employees among people looking to work abroad had

relented and their share amounted to 18%. On the other hand, the number of people employed in manufacturing has increased among all residents looking to work abroad. In 2010, people employed in the manufacturing industry made up 10% of all potential emigrants, but in 2013 their share amounted to 17% which almost equals the share of construction sector employees looking to work abroad. Figure 17 indicates that among people looking to work abroad the share of those who are employed in accommodation and catering, and healthcare and social welfare is somewhat higher than the actual share of people employed in these sectors in Estonia, according to this survey.

Figure 17. People looking to work abroad and population employed on the labour market by economic sectors, 2013



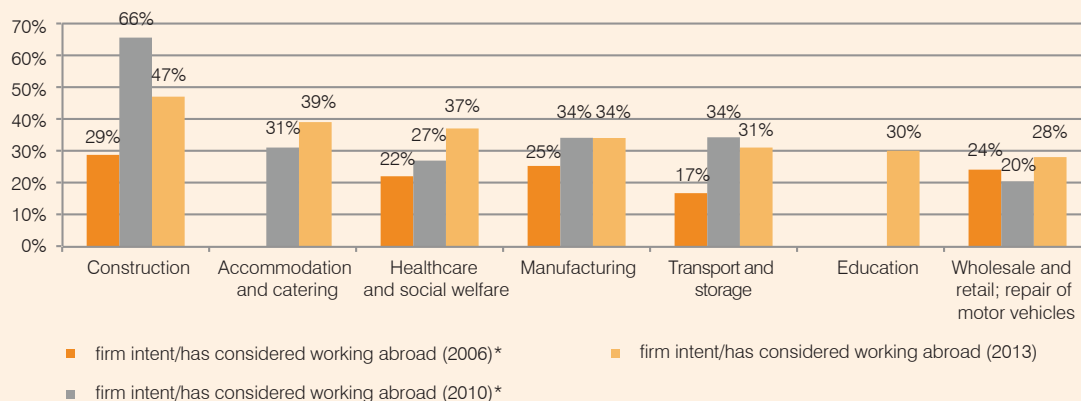
Source: Migration potential survey 2013, author's calculations

In 2010, 27% of people employed in the healthcare and social welfare sector intended to work abroad, but by 2013 their share had increased to 37%.

A better overview is provided by Figure 18 which indicates the share of people looking to work abroad in the total number of people employed on the labour market, by sectors. The people employed in the construction sector still feature the highest share of those looking to work abroad, but compared to 2010 their share has notably dropped. In 2010, 66% of people employed in construction said that they have a firm intent or have considered working abroad, but in 2013 this variable amounted to 47%. On the other hand, the intent to work abroad has increased among people working in the sectors of education, accommodation and catering, wholesale and retail, and healthcare and social welfare. In 2010, 27% of people employed in the healthcare and social welfare sector intended to work abroad, but by 2013 their share had increased to 37%. Furthermore, the intent to work abroad has considerably grown among Estonian residents employed in the education sector. In 2013, almost one in three people employed in the education sector has considered working abroad or has a firm intent to take up employment abroad.

Although Figure 18 shows that the share of people looking to work abroad has increased in several sectors, the Estonian population's intentions of working abroad are not so firm as during the crisis in 2010. This means that number of people who have considered working abroad or have a firm intent is greater than in 2010 in several sectors, but on the other hand, the number of people who have made preparations for working abroad has dropped. The 2013 survey results allow determining the share of people who have made preparations for working abroad for the construction and manufacturing sectors only, because in other sectors there are so few Estonian residents who have made preparations that extrapolation based on the sample is not possible. In 2010, 43% of people employed in construction and 17% of people employed in manufacturing had made preparations for working abroad, but by 2013 the share of such persons dropped to 27% in construction and remained the same in the manufacturing sector.

Figure 18. Share of people looking to work abroad in total employed population by economic sectors, 2006, 2010, 2013



* The 2006 survey sample of people employed in accommodation and catering and the 2006/2010 survey sample of people employed in education were not large enough to present results.

Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations in education were not large enough to present results.

5. Factors facilitating or impeding employment abroad

Why are Estonian residents interested in working abroad and which limitations might restrict their emigration? According to the neoclassical macroeconomic theory cited above, the factors behind migration include economic welfare, unemployment and salaries. However, academic literature on migration commonly recognises push and pull factors which means that, on the one hand, the people's willingness to work abroad are affected by push factors attributable to the sending country (like unemployment and economic downturn), and on the other hand, pull factors attributable to the destination country (like higher salaries, better working conditions, professional development opportunities, etc). In 2013, as compared to 2010 when the last Migration Potential Survey was conducted, the labour market is recovering from the effects of the economic crisis which could lead to the presumption that the impact of push factors prevailing in Estonia has weakened as regards the migration potential of Estonian residents. On the other hand, it is questionable whether or not the pull factors of destination countries affect Estoni-

ans' intentions to work abroad in the same way as during the period of economic crisis. The purpose of the following Chapter is to determine the degree to which the reasons behind Estonian residents working abroad have changed compared to 2010 when the economic crisis prevailed.

5.1 Factors facilitating employment abroad

Table 1 provides the responses given by Estonian residents when asked to name the most important reason for taking up employment abroad or working there. The opinion that the wages in Estonia are low is still predominant among people intending to work abroad as well as those who have worked abroad. 45% of people intending to work abroad claim that the main reason for going abroad are the lower wages in Estonia. The second reason is the higher living standard and social guarantees in the destination country - indicated somewhat more by people who have worked abroad (25%) than by those looking to work abroad (18%). Table 1 shows clearly that peo-

ple looking to work abroad have mentioned as main reasons the push factors in the originating country like low wages (45%), unemployment (7%) and disappointment in Estonia (2%) as well as pull factors in the destination country like better social guarantees (18%), discovering the world (9%) and better

development opportunities (8%). However, it cannot be argued that pull factors influence the Estonian residents' willingness to work abroad more than push factors because the originating country's push factor like lower wages in Estonia could be the destination country's pull factor, i.e. high wages abroad.

Table 1. The most important reason for working abroad mentioned by respondents and the share of respondents mentioning the reason, 2013

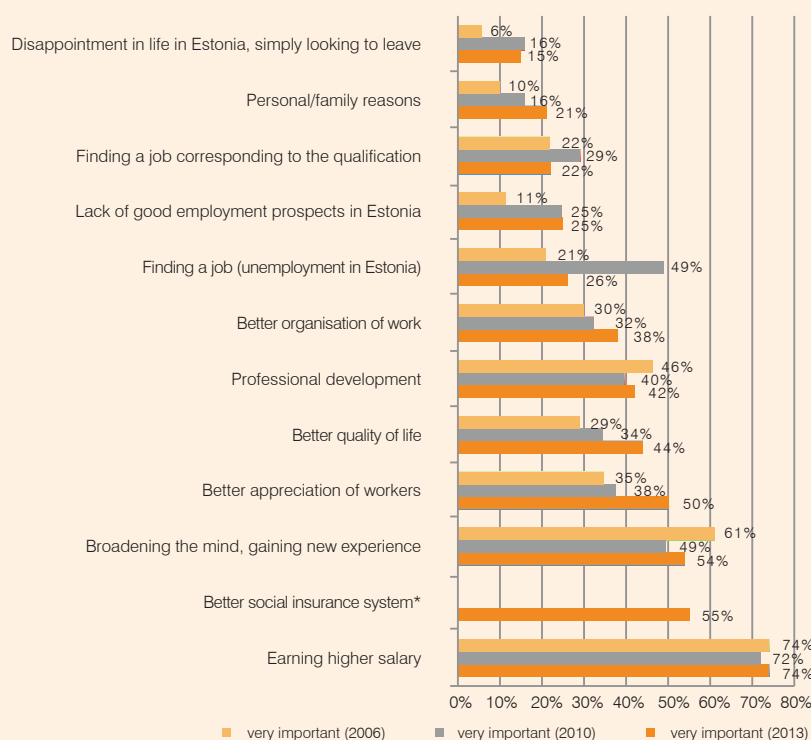
	people who have worked abroad before	people with firm intent and who have considered working abroad
Low salaries in Estonia	46%	45%
Higher living standard, better social guarantee	25%	18%
Discovering the world, self-development	6%	9%
Better development opportunities	8%	8%
Unemployment	1%	7%
Close ones/family/relatives are abroad	1%	3%
Disappointment in Estonia	0%	2%
Change of living environment	0%	1%
Language practice, studies	0%	1%
Other	13%	5%

Source: Migration potential survey 2013, author's calculations

Figure 19 complements the above table and allows conducting a comparative analysis – across years – of the reasons for taking up employment abroad among people who have a firm intent to work abroad or have considered working abroad. The Figure depicts the statement in the preceding paragraph that over the years – among people intending to work abroad – the main reason for doing so has always been the wish to earn a higher wage. In this regard, Estonian residents who are looking to work abroad do not differ from the residents of other East European countries. Specifically, the 2013 Eurobarometer Survey (European Commission, 2013) has highlighted that higher wage is the main reason for working abroad among people

looking to work abroad who originate from Eastern Europe. According to the 2010 migration potential survey, the second ranked reason was the willingness to find a job (49% considered it very important), but by 2013 unemployment as the reason for working abroad had considerably dropped among people looking to work abroad (26% consider it very important). Then again, unemployment as the reason for working abroad is more important among women looking to work abroad than men. In 2013, 31% of women claimed that the wish to find a job is a very important reason for working abroad, whereas only 20% of men looking to work abroad shared this opinion.

Figure 19. Importance of the reasons for working abroad among people intending to work abroad, 2006, 2010, 2013



* The 2006 and 2010 survey questionnaire did not include the option “better social insurance system”.

Source: Migration potential surveys in 2006, 2010 and 2013, and author’s calculations

As for the list of all reasons for working abroad, only finding a job corresponding to qualifications as a very important reason has become less relevant in 2013 (decreased from 29% to 22%), in addition to unemployment as the reason for working abroad. As to other reasons for working abroad, the number of people considering the given reason very important has increased in 2013. In 2013, the potential migrants find that other very important reasons for working abroad include the better social insurance system of the destination country (55%) and the desire to broaden their mind and gain new experiences (54%). Compared to 2010, the „greater appreciation of employees” has increased most among the reasons for working abroad. In 2010, this reason was considered very important by 38% of people looking to work abroad, and by 2013 their share has risen to 50%.

An age-based analysis of the reason for taking up employment abroad reveals that un-

like other age groups, the youth (15-24-year-olds) consider broadening their mind as the paramount reason (66% deem it very important) instead of the higher salary in the destination country. Likewise, the youth don’t complain so much about unemployment as other age groups. 31% of 25-44-year-old and 26% of 45-64-year-old potential migrants think that finding a job is a very important reason for taking up employment abroad whereas only 18% of the youth looking to work abroad concur.

Although the migration potential and intentions are higher among youth, the reasons why they take up employment abroad are somewhat different than those of older people. For youth intending to work abroad, the reason for leaving Estonia is the willingness to discover the world and develop professionally rather than being disappointed in the life in Estonia or lacking professional prospects. Specifically, 42% of the representatives of the eldest age group and 30%

For youth intending to work abroad, the reason for leaving Estonia is the willingness to discover the world and develop professionally rather than being disappointed in the life in Estonia or lacking professional prospects.

People looking to work abroad no longer find the obstacles to working abroad as restrictive as in the earlier years.

of people in their prime working age looking to work abroad argued that a very important reason for working abroad is the lack of employment prospects in Estonia whereas only 11% of youth looking to work abroad shared this opinion. Therefore, the youth's higher willingness to work abroad should not be considered catastrophic – instead, we should agree with those who believe that we have reached a new migration era (Castles, Miller 2008) where working and studying abroad is more and more common. Evidently, youth are the group with the highest propensity to test and discover the possibilities offered by Europe without frontiers.

Differences based on nationality emerge clearly when analysing the reasons why people look to work abroad. It is a known fact that the unemployment rate has always been higher among non-Estonians than Estonians and these complicated circumstances on the Estonian labour market faced by non-Estonians translate into reasons for taking up employment abroad. 20% of Estonians and as much as 39% of non-Estonians looking to work abroad consider unemployment as a very important reason. Likewise, 36% of non-Estonians looking to work abroad as opposed to 21% of Estonians claim that a very important reason for working abroad is the lack of employment prospects in Estonia.

Furthermore, the reasons for working abroad vary across the occupational groups of people intending to take up employment abroad. Specifically, blue-collars find the higher salary offered abroad more important than white-collars do. This is a very important reason for working abroad for 96% of people in elementary occupations and 80% of skilled labour looking to work abroad, but among office staff/officers and specialists/managers these rates amount to 67% and 49%, respectively. Further, more blue-collars (52% of people in elementary occupations and 32% of skilled labour) than white-collars (13% of office staff/officers and 14% of specialists/managers) consider unemployment in Estonia a very important reason for working abroad.

In addition, one in three skilled workers and people in elementary occupations finds that a very important reason for working abroad is the lack of employment prospects in Estonia whereas 7% of office staff/officers and 23% of specialists/managers concur.

5.2 Factors impeding employment abroad

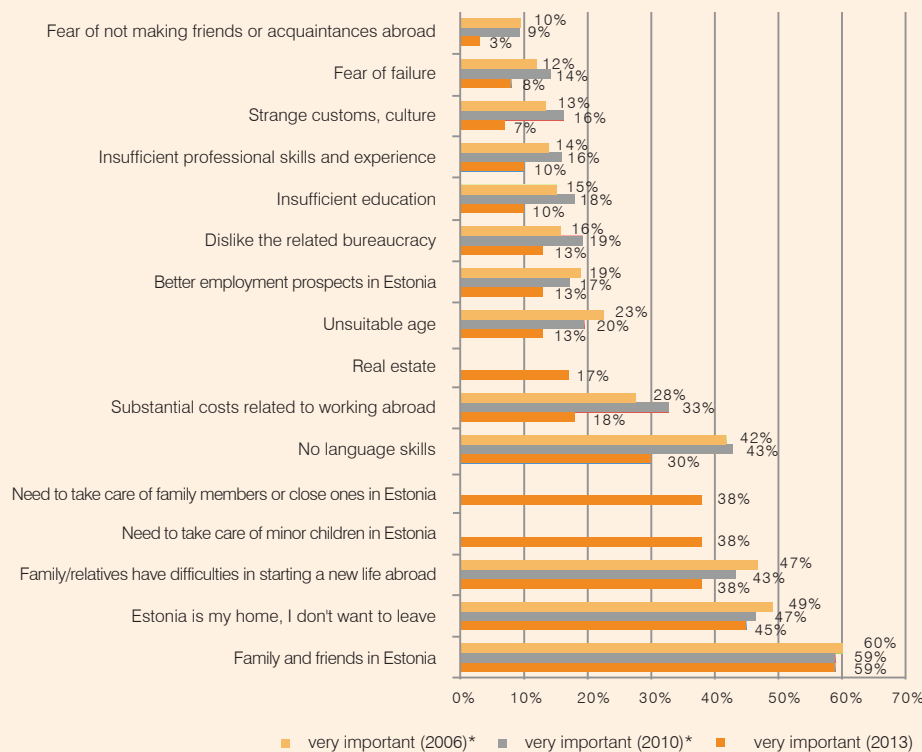
The plans of working abroad might not always become a reality. Therefore, it is essential to analyse the main barriers faced by Estonian residents in taking up employment abroad. For the EU citizens, the main obstacle to working abroad is family and personal reasons (European Commission 2013). Figure 20 shows that Estonian residents do not differ from the rest of Europe in this regard. Hence, over the years, the main obstacle for people looking to work abroad has been family and friends. Similarly to 2006 and 2010, in 2013 59% of people looking to work abroad argue that family and friends are a very important obstacle to working abroad. In all other aspects, however, the people looking to work abroad find that the barriers to labour migration have diminished. This means that people looking to work abroad no longer find the obstacles to working abroad as restrictive as in the earlier years.

Nevertheless, the main obstacles to working abroad relate to the originating country, i.e. in addition to family and friends, obstacles to working abroad include „Estonia is my home” (45% of people looking to go abroad consider this a very important obstacle) and the need to take care of minor children or family members/close ones in Estonia (38%). As to reasons relating to the destination country, it is evident that for people looking to work abroad the foreign obstacles have diminished even more than domestic obstacles as compared to 2010. During the economic crisis in 2010, the main barriers relating to the destination country included substantial costs related to working abroad (33% of people looking to work abroad considered

this a very important obstacle) and the lack of foreign language skills (43%), but by 2013 the financial obstacles have considerably di-

minished (18%) and people also feel more confident about foreign language proficiency (30%).

Figure 20. Importance of the barriers to working abroad among people intending to work abroad, 2006, 2010, 2013



* The 2006 and 2010 survey questionnaire did not include the options „need to take care of minor children in Estonia“ and „need to take care of family members or close ones in Estonia“.

Source: Migration potential surveys in 2006, 2010 and 2013, and author's calculations

The comparison between men and women looking to work abroad reveals that for women the lack of foreign language skills is a more important obstacle (37% consider it a very important obstacle) whereas men are more confident about foreign language proficiency (23%). Although for women their family and friends living in Estonia are a somewhat more important obstacle (63% and 58% of men consider this a very important obstacle), it is a pleasure to see that the need to take care of children is equally important for women (39%) and men (38%). The need to take care of children is evidently a very important barrier to working abroad for people in their prime working age (25-44 years) (61%) whereas young people and the eldest age group share this opinion to a much lesser extent (10% and 23%, respectively).

Therefore, in view of the factors impeding employment abroad, it could be concluded that by providing an agreeable environment for raising children in Estonia for people in prime working age it is less likely that they would like to work abroad because children and family are the factors restricting employment abroad.

Analysing the barriers to working abroad by nationality reveals that for non-Estonians the foreign language skills prove a more important obstacle (40% of people looking to work abroad find it very important) than for Estonians (26%). On the other hand, 48% of Estonians as opposed to 39% of non-Estonians feel that Estonia is their home and this obstructs their employment abroad. Hence, non-Estonians do not have such close ties

with Estonia as their home which restricts them less in taking up employment abroad. Regardless of nationality, for people looking to work abroad who have a higher educational level “Estonia is my home” poses a more important obstacle to working abroad than for people with a lower educational level. Specifically, 51% of people looking to work abroad who have third level education claim that having their home in Estonia is a very

important obstacle whereas such persons make up 44% of people with second level education and 37% of those with first level education. Hence, a conclusion can be drawn that the working-age population with a higher educational level values Estonia as a living environment more highly and considers leaving Estonia as their home place a more important barrier to employment abroad.

Summary

The economic crisis which began at the end of 2008 affected the emigration and employment abroad of Estonia’s working-age population and in line with the actual circumstances their willingness to work abroad grew. The previous migration potential survey commissioned by the Ministry of Social Affairs in 2010, i.e. during the crisis, revealed that 8,5% of Estonia’s working age-population or 76 400 persons had a firm intent to work abroad and that they had made preparations to this end. By 2013, the labour market situation has improved and the working-age population’s chances of finding work in Estonia have considerably improved as compared to 2010 amidst the economic crisis. The results of this survey indicate that in 2013 the migration potential had dropped compared to 2010 - to a level of 5.9% - meaning that 51 600 working-age persons in Estonia firmly intend to work abroad and have made preparations to this end.

During the economic crisis, employment abroad was the only chance of working for many Estonian residents. In 2010 amidst the economic crisis, one in four Estonian residents looking to work abroad was unemployed, whereas by 2013 the share of the unemployed among people intending to work abroad has dropped – as a result, the profile of Estonian residents looking to work abroad now resembles the rest of Estonia’s population. However, the fear of losing their job has not vanished among people looking to work abroad. In 2013, compared to 2010, the

fear of losing their current job had lessened among labour wishing to stay in Estonia, whereas people looking to work abroad are still as convinced as in 2010 that they could lose their job in the near future. Thus, it can be concluded that employment insecurity is one of the reasons motivating people to consider employment abroad.

However, analysing the people looking to work abroad on the basis of socio-demographic characteristics reveals that among women the economic crisis had a lesser effect on the willingness to work abroad than among men. Among women the migration potential remained pretty much the same in 2006-2013, whereas the intentions of men to work abroad increased during the economic crisis and then dropped as the crisis boiled down. Therefore, the migration potential was reduced a lot more among men than women in 2013. Likewise, the migration potential dropped most among people in the prime working age (25-44) and the eldest age group (45-64), but among youth it remained on the same level as in 2010. Hence, it can be presumed that the rate of taking up employment abroad is unlikely to drop among youth in the next few years. Analysing the migration intentions of the youth by nationality indicates that the willingness of young non-Estonians to take up employment abroad is somewhat higher than among young Estonians which would be due to the fact that for non-Estonians finding work in Estonia is more complicated than for Estonians.

In 2013, similarly to 2010, Estonian residents with the lowest educational level still feature the highest rate of people looking to work abroad whereas the rate is the lowest among highly educated people. Therefore, the results of this survey do not confirm the statement that in the next few years Estonia is facing a disproportionately high brain drain. However, in the forthcoming years, the deficit of skilled labour could be aggravated as their migration intentions continue to remain on a high level. In 2013 the number of skilled workers looking to work abroad has dropped compared to 2010, but when it comes to occupational groups skilled workers still feature the highest rate of those intending to work abroad. However, the professional background of Estonian residents looking to work abroad has become more diverse. As a result, the construction sector employees no longer predominate among all potential migrants despite the fact that people employed in the construction sector still feature the highest rate of those looking to work abroad. On the other hand, the intent to work abroad has increased among people working in the sectors of education, accommodation and catering, wholesale and retail, and healthcare and social welfare.

The survey revealed a somewhat concerning fact that the Estonian residents' plans for working abroad have become more long-term as compared to 2010 (the crisis period), i.e. there are much more of those looking to stay abroad for more than a year or permanently after taking up employment. Therefore, people wish to emigrate from Estonia together with their families when taking up long-term employment abroad. Consequently, this survey indicated that in 2013 as compared to 2010 the number of Estonian residents who would take along their spouse/cohabitee and/or children when going to work abroad has considerably increased.

Just like among people working abroad, in 2013, Finland is still the most popular destination country among people looking to work abroad. Finland as a potential destination country is preferred especially among people with a lower educational level. However, the

Estonian residents' expectations related to wages have grown compared to the period of economic crisis. During the economic crisis, the Estonian residents were more willing to accept a lower wage whilst work abroad than the local labour, but along with the recovery from the crisis the number of Estonian residents who believe that whilst working abroad they should earn a pay equal to that of local labour has increased. Higher expectations to the wage for working abroad are reflected in the specific wage figures requested. In 2010, the people looking to work abroad stated that they would be willing to work abroad if their average monthly net wage would be EUR 1400 (median EUR 1300), but in 2013 those wishing to work abroad were looking to earn an average monthly net wage of EUR 1900 (median EUR 1500). As the Estonian population's wage expectations have grown faster than the real net wage in Estonia, it is evident that higher wage is the main reason behind the Estonian residents' intentions to work abroad. Further, it should be pointed out that compared to 2010 the biggest increase has been in the number of people looking to work abroad who find that a very important reason for working abroad is the fact that abroad the workers are valued more than in Estonia. In 2013, the main obstacle preventing the Estonian residents from taking up employment abroad is still family and friends living in Estonia.

It can be presumed that as long as the wages in Estonia continue to remain lower than in other EU Member States and especially our close neighbour Finland, the Estonian population will continue to be highly motivated to work abroad. Because the migration policy of developed countries regulates immigration, not emigration, the Estonian government lacks effective political measures to restrict emigration. Furthermore, such measures would not in any way be compatible with the EU's concepts related to the single economic area. Nonetheless, certain policy recommendations can be given based on the results of this survey to help design the migration policy.

Policy recommendations

- Overall, the non-Estonians' intentions to work abroad do not differ from the Estonians' intentions to work abroad, but the survey revealed that young non-Estonians (15-24-year-olds) are more willing to work abroad than young Estonians. The situation of non-Estonians, including non-Estonian youth, on the Estonian labour market has always been somewhat more complicated than the situation of Estonians, but due to the economic crisis unemployment increased much more among non-Estonian youth than Estonian youth. Therefore, more attention should be paid to improving the labour market opportunities for non-Estonian youth because according to this survey they are more willing to take up employment abroad.
- On the other hand, the youth's higher willingness to work abroad should not be considered catastrophic – instead, we should agree with those who believe that we have reached a new migration era (Castles, Miller 2008) where working and studying abroad is more and more common. Evidently, youth are the group with the highest propensity to test and discover the possibilities offered by Europe without frontiers. The survey indicated that for youth intending to work abroad, the reason for leaving Estonia is the willingness to discover the world and develop professionally rather than being disappointed in the life in Estonia or lacking professional prospects. Therefore, the youth's desire to develop themselves abroad should not be seen from the government's view as the loss of human resources; instead, focus should be on finding ways of supporting the return of youth to their homeland.
- The survey showed that family and friends living in Estonia still constitute the main barrier to working abroad for Estonian residents. Another important obstacle is the need to take care of children and close ones. Therefore, in view of the factors impeding employment abroad, it could be concluded that by providing an agreeable environment for raising children in Estonia for people in prime working age it is less likely that they would like to work abroad because children and family are the factors restricting employment abroad. Hence, the family policy measures are essential to mitigate the intentions of Estonian residents to work abroad and attract the emigrants to return.
- Although according to this survey, Estonia should not be facing increased brain drain in the next few years as the willingness to work abroad is higher among Estonian residents with a lower educational level, the willingness to work abroad remained high among skilled labour despite having dropped a little. Therefore, the deficit of skilled labour might be aggravated in Estonia due to their high migration potential. For skilled labour as opposed to white-collars, the unemployment in Estonia and the lack of employment prospects constitute more important drivers behind the intentions to work abroad. Hence, skilled workers looking to work abroad feature a higher share of those who cannot find a job meeting their qualifications – therefore, in view of future developments, it is essential to better align the education system with the skills required on the labour market.

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Facts from the survey

- In 2013, the migration potential dropped to 5,9% from the 8,5% in 2010 which means that 51 600 Estonian residents are likely take up employment abroad in the next few years.
- Compared to 2010, people looking to work abroad have become more aware of the possibilities of working abroad.
- Estonian residents have not become more selective as regards employment abroad – still, about one third of people looking to work abroad would accept a job requiring a level of qualification which is lower than at the current or last job.
- Finland is still the most popular destination country among people looking to work abroad, especially among persons with a lower educational level.
- In 2013, the people looking to work abroad would like to earn abroad an average net wage of EUR 1900 (median EUR 1500).
- The migration potential is higher among men and youth (15-24) in Estonia.
- Young non-Estonians are more prone to work abroad than young Estonians.
- The migration potential of Estonian residents with a low educational level is still the highest.
- The migration potential of skilled labour has decreased compared to 2010, but skilled labour still features the highest rate of those intending to take up employment abroad.
- The professional background of Estonian residents looking to work abroad has become more diverse - nevertheless, people employed in the construction sector still have the highest potential for labour migration.
- In 2013, the number of people intending to work abroad for more than a year or remain abroad permanently after finding work there has notably increased.
- In 2013, compared to 2010, the number of Estonian residents who would take along their spouse/cohabitee and/or children when taking up employment abroad has considerably increased.
- The main reason motivating Estonian residents to work abroad is still the higher wage offered abroad and the main barrier to employment abroad is the fact that their family and friends live in Estonia.

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