



EMN Study 2025

**FOSTERING SUSTAINABLE LABOUR MARKET INTEGRATION OF
MIGRANTS: SKILLS MATCHING POLICIES AND INSTRUMENTS**

Estonian national report

March 2026

Disclaimer: The following responses have been provided primarily for the purpose of completing a Synthesis Report for the EMN Focused Study on Sustainable labour market integration of third-country nationals: Skills matching policies and instruments. The contributing EMN NCP have provided information that is, to the best of their knowledge, up to-date, objective and reliable within the context and confines of this study. The information may thus not provide a complete description and may not represent the entirety of the official policy of an EMN NCPs' Member State.

This document was produced by Marian Juurik the expert of EMN Estonia. This report was compiled based on public and available information. Furthermore, experts of this topic were consulted.

Estonian national contact point

Estonian Academy of Security Sciences

Kase 61

12012

Tallinn

emn@sisekaitse.ee

1. TEMPLATE FOR NATIONAL CONTRIBUTIONS

Common Template of EMN Study: Sustainable labour market integration of third-country nationals: Skills matching policies and instruments

National Contribution from Estonia

Disclaimer: The following information has been provided primarily for the purpose of contributing to a Synthesis Report for this EMN Study. The EMN NCP has provided information that is, to the best of its knowledge, up-to-date, objective and reliable within the context and confines of this study. The information may thus not provide a complete description and may not represent the entirety of the official policy of the EMN NCPs' Member State.

Top-line factsheet [max. 1 page]

*The top-line factsheet will serve as an overview of the **National Contribution** introducing the Study and drawing out key facts and figures from across all sections, with a particular emphasis on elements that will be of relevance to (national) policymakers. Please add any innovative or visual presentations that can carry through into the synthesis report as possible infographics and visual elements.*

Please provide a concise summary of the main findings of Sections 2-5:

Skills mismatching is a visible but not systematically measured phenomenon in Estonia. It particularly affects refugees and beneficiaries of temporary protection, many of whom work in jobs that do not correspond to their qualifications or professional experience. In a 2023 IOM survey, only 44% of Ukrainian refugees reported that their current employment in Estonia matched their education and previous experience. Similar challenges can be observed among other beneficiaries of international protection, who often face comparable barriers.

Language proficiency remains the single most significant factor influencing migrants' ability to access jobs that match their qualifications. Free Estonian language courses, offered through national and local integration programmes, are in high demand but somewhat limited in availability.

Estonia, as a party to the Lisbon Recognition Convention, evaluates foreign qualifications according to the procedures agreed under the Convention. Article VII of the Convention stipulates that the qualifications of refugees, displaced persons and individuals in a refugee-like situation must be assessed even when they are unable to present full or partial documentary evidence of their education. The recognition of foreign qualifications in Estonia is regulated by the Government Regulation No. 89 of 6 April 2006 on the *Conditions and Procedure for the Evaluation and Academic Recognition of Foreign Qualifications and the Use of Qualification Titles Awarded in Foreign Education Systems*. An amendment that entered into force on 8 June 2018 introduced a specific provision (§81) for assessing the qualifications of beneficiaries of and applicants for international protection, as well as other foreign nationals in comparable circumstances.

The Estonian ENIC/NARIC Centre, operating under the Education and Youth Board, is the national authority responsible for evaluating foreign qualifications and issuing decisions on academic recognition. In cases where an applicant cannot fully document their educational background, ENIC/NARIC prepares a description of educational background that provides sufficient information for employers or higher education institutions to understand the individual's studies and likely qualification level. This mechanism allows refugees and displaced persons to demonstrate their skills and competences even when official documents are missing, facilitating their access to education or employment.

Recognition of foreign qualifications is also a significant barrier to skills matching, particularly for those trained outside the EU. While Estonia has established clear procedures and international alignment, challenges persist for applicants in regulated professions such as medicine, nursing, or teaching, where additional training or adaptation periods are required to meet EU standards.

Skills mismatching is also influenced by gender and age. Research indicates that women arriving with children under temporary protection are more likely to face difficulties in entering employment, while older migrants often lack the language skills or physical ability required for available low-skilled work.

Several institutions address these challenges. The Estonian Unemployment Insurance Fund supports both jobseekers and employers through job mediation, language and vocational training, and compensations for mentoring and translation. The *Settle in Estonia* programme provides free adaptation and language courses, while *Work in Estonia* promotes Estonia as a destination for international specialists and supports companies in international recruitment. OSKA's labour market monitoring and skills forecasting system helps align migration, education and labour policies.

Overall, Estonia's policy framework provides a strong institutional foundation, but most measures target integration and employment in general rather than skills matching specifically. Language barriers, limited access to recognition procedures, and the restrictive migration quota continue to hinder full utilisation of migrants' skills in the Estonian labour market.

Section 1: Statistical Overview of Skills (Mis-)Match Phenomenon

This section provides an overview of the latest available statistical data on skills mismatch (Eurostat, EU-LFS and PIAAC), and will be drafted by OECD/ICF. Initial figures will be made available to NCPs for their qualitative analysis in subsequent sections prior to the launch of the study as background information. A more detailed analysis of the data for the report will be provided by the OECD at a later stage.

The Eurostat data ([lfsa_eoqgan](#)) compiled by ICF will provide an overview of the overqualification rate (measured as tertiary-educated persons working in low- or medium-skilled occupations) third-country nationals in EU Member States compared to EU citizens/nationals.

Based on EU-LFS and PIAAC data, the OECD will provide insights on the recognition of foreign qualifications of migrants and describe how migrants in EMN Member and Observer Countries are affected by skills mismatch:

- Based on the EU-LFS 2021 Special Module on Labour market situation of migrants and their descendants, the OECD will provide an overview of the recognition of formal qualifications obtained abroad. This will be complemented by an overview on whether

qualifications of migrants were obtained abroad based on the latest EU-LFS data (for 2023, if available 2024).

- Based on the 2022/2023 cycle of the Survey of Adult Skills (PIAAC),¹ the OECD will provide an overview of the scale skills mismatches in EMN Member and Observer Countries (specified which type of mismatch, i.e. vertical and/or horizontal).

Section 2: Drivers of Skills Mismatch

In this section, NCPs are asked to provide input on the drivers of skills mismatching, if possible referring to different migrant groups outlined in the scope (labour migrants, third country nationals arriving via family reunification, beneficiaries of international protection, beneficiaries of temporary protection) in their respective country based on available reports and studies, and expert opinions (policy makers, national and sub-national public actors, government agencies, international organisations, civil society organisations, including migrant-led organisations, government agencies etc.). The section covers drivers of skills mismatch in regard to vertical skills mismatch (mismatch regarding the level of skills/ education) as well as horizontal skills mismatch (mismatch in the field of education). Different types of drivers are divided into different tables to facilitate descriptive comparison across countries at a later stage, however this different type of drivers may partly overlap.

¹ The data is collected via a household survey designed to collect information on the skills proficiency of the adult population aged 16-65. The survey includes two direct questions relating to skills recognition (Subjective skills mismatch; Match of qualifications to job requirements), and it is possible to further gauge credentials/skills recognition via (a) information on educational attainment including the country where it was obtained, and the field of study, and (b) information on the current job (sector, industry, various details including the qualifications and experience required). Regarding migration status, PIAAC includes information on country of birth of the respondent (and their parents) but not on citizenship, so migrant status would be captured via country of birth.

1. Based on available literature and expert opinions, what are migrant-specific drivers for skills mismatches, i.e. drivers related to the migrant populations in your country? ² Please explain, using the table below. *The mentioned drivers below are derived from the literature (see Section 1) and are meant as orientation to help NCPs in their data collection/analysis. If some drivers do not fit the situation in a country, they can/should be disregarded.*

Driver	Applicable (YES/NO)	Explanation (including information on source)
Country of origin related drivers (e.g. lack of documentation of qualifications)	YES	The challenge is particularly evident among those who have experienced forced displacement. According to a Praxis study ³ , Ukrainian refugees were compelled to leave their home country abruptly, without the opportunity to prepare for migration or collect necessary documentation. This has placed them in an unequal position compared with other (legal) migrant groups as the same conclusion can be drawn for other beneficiaries of international and temporary protection, who often face similar circumstances and barriers when entering the Estonian labour market. According to an International Organization for Migration (IOM) survey ⁴ conducted in 2023 among 2,378 Ukrainian refugees, only 44% of respondents reported that their current employment in Estonia corresponds to their educational background and professional experience. This mismatch was particularly prevalent among those with higher education.

² This question addresses drivers for skills mismatches that are specifically related to certain features of migrants.

³ Praxis, 2023. Ukrainian Refugees in the Labour Market. Available: https://www.praxis.ee/uploads/2023/02/Teemapaber_tooturg.pdf

⁴ IOM, 2023. Estonia. Surveys with Refugees from Ukraine: Needs, Intentions, and Integration Challenges. Available: https://dtm.iom.int/sites/g/files/tmzbd11461/files/reports/Estonia%20Needs%20and%20Intentions%20Surveys%202023%20Annual%20Report_0.pdf

		<p>According to the Estonian Ministry of the Interior⁵, documentation and qualification recognition are generally not an issue for labour migrants, as residence permit applications typically do not require formal proof of qualifications, except in cases involving the EU Blue Card scheme. However, Work in Estonia⁶ notes that international jobseekers often face difficulties in obtaining apostilled documents from their home countries. These obstacles are not specific to Estonia but rather reflect inefficiencies and delays in administrative systems abroad.</p> <p>To address such barriers, the Estonian ENIC/NARIC Centre provides free qualification assessments for recipients and applicants of international protection, as well as for other foreign nationals in similar circumstances⁷. The service is also available to individuals unable to present full or partial documentation of their education or training. In such cases, ENIC/NARIC issues a “description of educational background” designed to offer employers and higher education institutions sufficient information about the applicant’s studies and partially verifiable qualifications.</p>
Disparities in education system between country of origin and receiving country (e.g. strong vocational focus in receiving countries not present in countries of origin)	YES	Training obtained in the country of origin may not meet Estonian/EU standards—for example, Ukrainian nurses and midwives cannot continue working in the same positions in Estonia because

⁵ Information provided by an expert from the Estonian Ministry of the Interior (12.09.2025).

⁶ Information provided by an expert from Work in Estonia (07.10.2025).

⁷ Regulation on the Conditions and Procedure for the Evaluation and Academic Recognition of Foreign Qualifications and the Use of Qualification Titles Awarded in Foreign Education Systems, § 8¹. Available: <https://www.riigiteataja.ee/akt/128052011008?leiaKehtiv>

		their training programs are shorter than those in the EU ⁸ .
Disparities in skill requirements for specific professions between country of origin and receiving country	YES	For example, service workers and teachers working on the basis of the international curriculum are required to have Estonian language proficiency at B1 level, while nurses and teachers working in general education schools, who teach in a language other than Estonian must meet B2 level requirements. ⁹ Thus, Ukrainians trained as teachers may find it easier to get jobs at international schools.
Extent of regulated professions in country of origin– as opposed to receiving country- (i.e. regulations for the practice of certain professions)	YES	The Ministry of Education and Research notes that for medical specialists, the Health Board operates a system for recognising third-country qualifications. Medical education is regulated at the EU level by harmonised training standards allowing automatic mutual recognition within the EU. Applicants from third countries may be required to complete additional training to meet EU minimum qualification requirements. ¹⁰
Age-related drivers (that in combination with migrant status interact on skills mismatch, e.g. age at time of arrival could impact skills mismatch, since younger migrants tend to have less difficulties in learning the language of the receiving country- see below)	YES	According to a study among refugees, older people report that since they do not speak Estonian or English, they can only access physically demanding low-skilled jobs, which they may no longer be able to perform due to age or

⁸ Ministry of Social Affairs, Guidelines for healthcare providers on the integration of Ukrainian war refugees into the Estonian healthcare system, as of 30 March 2022. Available: https://www.apteekriteliit.ee/failid/Ukraina_tervishoiutootajad_juhis_TTOdele_30.03.2022.pdf

⁹ Requirements for the knowledge and use of the Estonian language for civil servants, employees and self-employed persons, § 7 and 8. Available: <https://www.riigiteataja.ee/akt/127072024003?leiaKehtiv>

¹⁰ Information provided by an expert from the Estonian Ministry of Education and Research (03.10.2025).

		health limitations. ¹¹
Gender-related drivers (that in combination with migrant status interact on skills mismatch)	YES	In temporary protection cases, women are often more constrained in accessing employment due to childcare responsibilities. Research by the University of Tartu shows that having children increases men’s likelihood of employment, whereas it decreases women’s employment prospects. ¹² Even though this is not based on a specific reference, it is likely to be true for other migration categories too.
Language proficiency of language of receiving country	YES	Language proficiency is likely the single biggest barrier to working in one’s trained profession ¹³ . Exceptions include cases of labour migration, where employment is secured prior to arrival. According to the Ministry of Economic Affairs and Communications ¹⁴ , labour market data show higher employment rates among those who speak Estonian (69.5%) compared with those who do not (57.2%). Since 2020, employment among non-speakers has increased, but unemployment remains higher among non-speakers (13.6%) than among speakers (9.1%).
Length of stay (considering that the longer a migrant lives in country, the more the extent of skills mismatch tends to be reduced)	YES	Language learning—migrants who stay longer in Estonia are more likely to acquire Estonian language proficiency sufficient to work in their own field. According to the OSKA study on foreign

¹¹ RITA, 2023. Available: https://skytte.ut.ee/sites/default/files/2023-04/RITA%20Ukraina%20kriis_S%C3%B5jap%C3%B5genikud%2C%20kes%20ei%20t%C3%B6%C3%B6ta%20ega%20otsi%20t%C3%B6%C3%B6d.pdf

¹² University of Tartu. Refugees find employment in very different settlement contexts, 2024. Available: <https://www.cmi.no/publications/file/9186-refugees-find-employment-in-very-different-settlement-contexts.pdf>

¹³ OSKA general forecast 2022-2031. Available: <https://uuringud.oska.kutsekoda.ee/uuringud/oska-uldprognoos>

¹⁴ Information provided by an expert from the Estonian Ministry of Economic Affairs and Communications (06.10.2025).

		labour and Ukrainian refugees ¹⁵ , the employment structure among Ukrainians is expected to change over time: as language proficiency improves, a shift towards higher-skilled positions is likely.
Limited information about the labour market/employers, migrants might exhibit in comparison to natives/locals	NO (mostly)	Comprehensive labour market information is easily available through various online platforms (e.g. CV Keskus, Work in Estonia). Several organisations provide counselling services, including Work in Estonia (career and business advisory), the Estonian Unemployment Insurance Fund (career counselling, job placement, and training), and the Integration Foundation (information and support services).
Discrimination/Stereotypes in public against (certain groups of) migrants (e.g. colour, ethnicity/origin, status)	YES	The Estonian Equality Commissioner's 2024 special report on racial discrimination ¹⁶ highlights persistent issues. According to the report, many respondents of colour in Estonia have experienced verbal harassment, exclusion from discussions or meetings, or being assigned tasks below their qualifications. The report stresses that racism and xenophobia often remain under-acknowledged, with stereotypes reinforced by limited exposure to diversity and by some media narratives.
Career gaps of migrants (e.g. due to migrant journey)	NO	For legal migration, career gaps rarely occur. Recipients of international or temporary protection have generally integrated into the Estonian labour market relatively quickly, with language being the main barrier. According to the Ministry of Economic Affairs and Communications ¹⁷ , employment among Ukrainian

¹⁵ OSKA study on foreign labour, 2025. Available: <https://uuringud.oska.kutsekoda.ee/uuringud/v%C3%A4list%C3%B6%C3%B6j%C3%B5ud>

¹⁶ Equality Commissioner's Special Report on Racial Discrimination in Estonia, 2024. Available: <https://www.volinik.ee/infomaterjalid/eriraport-rassiline-diskrimineerimine-eestis.html>

¹⁷ Information provided by an expert from the Estonian Ministry of Economic Affairs and Communications (06.10.2025).

		temporary protection holders stands at 68%, which is considered high. However, there is limited data available for other international protection groups due to their smaller numbers in previous years.
Other (please specify)		

2. Based on available literature and expert opinions, what are country-/employer-specific drivers for skills mismatching of migrants in your country? Please explain, using the table below. *The mentioned drivers below are meant as orientation and are derived from the literature (see Section 1). If some drivers do not fit the situation in a country, they can/should be disregarded.*

Driver	Applicable (YES/NO)	Explanation (including information on source)
Economic and labour market conditions (e.g. economic recession, which might affect migrants' skills mismatch more than non-migrants)	YES	According to the Ministry of Economic Affairs and Communications ¹⁸ , economic downturns tend to affect the employment rates of non-native speakers more severely, widening the employment gap. This is supported by the fact that in 2024, according to Statistics Estonia, the unemployment rate among residents with other mother tongues was more than twice as high as among Estonian-speaking residents in Estonia. However, in the case of legal labor migration, there are certain sectors where employers specifically seek foreign workers who have the necessary skills and qualifications that cannot be found in Estonia.
Structure of housing markets (e.g. housing polices with no rent caps, shortage of affordable housing in areas with available matching jobs for migrant population's profiles)	No data	No concrete data is available, but since most migrants tend to live in the capital where

¹⁸ Information provided by an expert from the Estonian Ministry of Economic Affairs and Communications (06.10.2025).

		housing is more expensive, it is certainly more challenging for them to find affordable housing.
Limited accessibility/availability of social assistance	NO	Migrants do have access to social assistance. Moreover, all legal third country nationals have the same rights and access as residents. This is also supported by IOM's survey among Ukrainian refugees ¹⁹ , in which only a small share of respondents (6%) reported challenges in accessing social assistance.
Limited access to formal childcare (for migrants based on their status, as opposed to non-migrants)	YES	The local municipality guarantees that all children aged 1.5 to 3 years, whose residence is within the municipality and whose parent has applied for a childcare place, have the opportunity to attend a childcare facility in the municipality. Similarly, all children aged 3 to 7 years, whose residence is within the municipality and whose parent has applied for a kindergarten place, have the opportunity to attend a kindergarten in the municipality. The only potential advantage for local residents may occur if the municipality has a limited number of kindergarten places and locals are able to apply or join the waiting list earlier. This ensures access to formal childcare for migrant families under almost the same conditions as local residents. However, according to a study by Praxis, Ukrainian refugees—most of whom are women—often face additional challenges related to childcare and family responsibilities. Many arrived with young children and, in some cases, elderly relatives requiring care ²⁰ . According to

¹⁹ IOM, 2023. Estonia. Surveys with Refugees from Ukraine: Needs, Intentions, and Integration Challenges. Available: https://dtm.iom.int/sites/g/files/tmzbdl1461/files/reports/Estonia%20Needs%20and%20Intentions%20Surveys%202023%20Annual%20Report_0.pdf

²⁰ Praxis, 2023. Ukrainian Refugees in the Labour Market. Available: https://www.praxis.ee/uploads/2023/02/Teemapaber_tooturg.pdf

		IOM ²¹ , among unemployed refugees not actively seeking work, 29% cited family responsibilities such as caring for children, elderly family members, or persons with disabilities as the main reason for labour market inactivity.
Employer-specific conditions (e.g. no diversity and inclusion strategy from which particularly migrants would benefit from in terms of skills mismatch)	NO	In the case of labor migration, employers tend to support increasing the immigration quota in order to hire more foreign workers with specific skills. These employers also often have diversity or inclusion strategies that help address skills mismatches for migrants (for example, on-the-job training). At the same time, in the case of temporary protection, employers were very accommodating and offered a wide range of job opportunities, although these did not always support optimal skills matching. When war refugees arrived in Estonia, the number of job offers increased significantly, with companies ready to employ them quickly, sometimes in positions that did not require language skills ²² . Although the jobs initially obtained did not always correspond to their qualifications, refugees began learning Estonian actively, which helped them gradually move towards more specialized employment. Overall, this early access to the labour market still proved beneficial, as it allowed them to enter employment quickly and gain stability.
Migration laws, policies, and practices (e.g. recognition processes of foreign qualifications, insecure status)	NO	According to the Ministry of the Interior, migration rules do not appear to increase skills mismatch. Generally, proof of qualifications is not required when applying for a residence permit. It is the employer's responsibility to

²¹ IOM, 2023. Estonia. Surveys with Refugees from Ukraine: Needs, Intentions, and Integration Challenges. Available: https://dtm.iom.int/sites/g/files/tmzbdl1461/files/reports/Estonia%20Needs%20and%20Intentions%20Surveys%202023%20Annual%20Report_0.pdf

²² Information provided by an expert from the Estonian Unemployment Insurance Fund (29.09.2025).

		ensure that the candidate meets the job requirements. ²³
(Lack of) integration policies, and practices (e.g. no tailored, subsidized language trainings, no job guidance for migrants, no early facilitation of labour market access) ²⁴	NO	Estonia has a relatively well-developed integration programme and several institutions that provide guidance and support for newcomers. Migrants can access Estonian language courses, job counselling, and adaptation programmes that help them better understand the local labour market and society. The Unemployment Insurance Fund, local governments, and NGOs play an active role in providing information and services to support integration. In addition, the state adaptation programme (the "Settle in Estonia" programme) offers free courses covering language training, legal rights, and practical advice for everyday life. While some challenges remain, Estonia has established a framework that facilitates relatively smooth integration.
Others (please specify)		

2. Section 3: National policies in the EMN Member and Observer Countries for promoting sustainable labour market integration through countering skills mismatch/facilitating skills matching

In this section, NCPs are asked to give an overview of the responsible actors for addressing skills mismatch/promoting skills matching and to provide a policy analysis of the available policies and initiatives in their country that aim to:

- address skills mismatch among migrant groups; and/or
- promote skills matching of migrant groups.

3. Who are the key actors in your country responsible for addressing skills mismatch/promoting skills matching of migrants?

²³ Information provided by an expert from the Estonian Ministry of the Interior (12.09.2025).

²⁴ See e.g. recommendations by [PES Network to have an idea about labour market integration policies, https://employment-social-affairs.ec.europa.eu/news/pes-network-adopts-7-recommendations-guide-employment-services-assisting-refugees-and-persons-2023-07-07_en](https://employment-social-affairs.ec.europa.eu/news/pes-network-adopts-7-recommendations-guide-employment-services-assisting-refugees-and-persons-2023-07-07_en), accessed 6 March 2025.

In Estonia, the main responsible actor is the Ministry of Economic Affairs and Communications, which houses the departments for the labour market and foreign talent. The Estonian Unemployment Insurance Fund²⁵, which operates under the Ministry, is also a key player, responsible among other things for job offers, advising and training all registered unemployed individuals.

Other important government actors include the Ministry of Education and Research, which deals with the recognition of qualifications (ENIC/NARIC²⁶), and the Ministry of Culture, which is responsible for overall integration and language learning (the Integration Foundation²⁷).

In addition, Estonia has launched the OSKA system²⁸ for forecasting future labour force and skills needs. OSKA studies support smart career choices and the development of forward-looking labour market and education policies. OSKA studies are conducted by the Estonian Qualifications Authority.

4. Have there been policy debates on skills (mis-)matching of migrants in your country between January 2023 and June 2025? YES/NO. If yes, please elaborate on the policy debate, including their understanding of/perspective on migrants' skills mismatch, and focus (e.g. educational qualifications, language skills, etc.) and the issues the policy actors seek to tackle (e.g. GDP loss, productivity loss, financial losses for migrants). Please limit your answer to policy debates in the past 2,5 years. 2023 is selected as a start year given that this was the EU Year of skills, and a relevant, national policy debate might be likely during that year.

In Estonia, public and policy debates over the past two and a half years have focused strongly on labour migration needs, quotas, and language requirements, rather than directly on the recognition of foreign professional qualifications. Nevertheless, these debates have a clear impact on how diplomas and skills acquired abroad are actually utilised in the labour market.

Media coverage highlights two dominant themes. First, the role of Estonian language proficiency: across multiple sectors, from service and transport to healthcare and education, language is described as the most significant barrier preventing migrants from working in jobs that correspond to their qualifications. For example, the Ministry of Education and Research has for some time been considering tightening national language requirements²⁹, while officials have reported that app-based taxi drivers

²⁵ The Estonian Unemployment Insurance Fund homepage. Available: <https://www.tootukassa.ee/en>

²⁶ Estonian ENIC/NARIC homepage. Available: <https://harno.ee/en/enicnaric>

²⁷ The Integration Foundation homepage. Available: <https://www.integratsioon.ee/en>

²⁸ OSKA homepage. Available: <https://oska.kutsekoda.ee/en/>

²⁹ ERR. *Haridusministeerium kaalub riigikeele oskuste nõuete karmistamist*, 11 April 2023. Available: <https://www.err.ee/1609179631>

still perform poorly in Estonian³⁰. At the same time, employer organisations such as the Estonian Employers' Confederation have argued that requirements are too strict in sectors like hospitality and service³¹, and transport associations have pushed for lowering the Estonian level required from bus drivers³². These disputes show how the language barrier can delay or prevent the use of migrants' professional skills, leading to horizontal mismatch between qualifications and job placement. In addition, recent proposed amendments to the Language Act have sparked political and public debate, as they would substantially increase coercive fines and employer liability in cases where employees fail to meet Estonian language proficiency requirements³³. This reflects a broader policy trend towards stricter enforcement, which may further limit migrants' access to jobs that match their qualifications.

Second, labour migration quotas and policy principles have been debated extensively. OSKA analysts have stressed that Estonia's ageing population and shrinking graduate cohorts cannot meet labour demand in key sectors³⁴. Similarly, the Employers' Confederation has called for clearer migration principles to ensure that both highly skilled specialists and lower-skilled workers can be recruited where needed³⁵. Political leaders, however, have also warned against an over-reliance on cheap labour, arguing that Estonia's long-term development should not be built on low wages³⁶. This lack of consensus contributes to uncertainty for both employers and migrants, indirectly affecting the extent to which foreign workforce is effectively used.

The situation of Ukrainian refugees illustrates these dynamics most clearly. Although many arrived with higher education and professional backgrounds, surveys and media reports show that large numbers are employed in low-skilled jobs such as cleaning or kitchen assistance³⁷. This underemployment is primarily linked to language barriers and the urgency of finding immediate income. In healthcare, Ukrainian doctors and nurses face additional examinations, residency requirements, and mandatory Estonian language proficiency before they are allowed to practice, which delays their access to relevant professions³⁸. Until then, their qualifications remain underutilised, contributing both to financial loss for individuals and to a broader skills mismatch in the labour market.

³⁰ ERR. *Ametnike sõnul on äpitaksojuhtide eesti keele oskus endiselt vilets*, 18 June 2024. Available: <https://www.err.ee/1609584979>

³¹ ERR. *Tööandjate Keskliit soovib langetada teenindajate eesti keele nõudeid*, 12 June 2024. Available: <https://www.err.ee/1609424404>

³² ERR. *Autoettevõtete liit kutsub langetama bussijuhtide eesti keele nõudeid*, 12 June 2024. Available: <https://www.err.ee/1609420882>

³³ ERR. *Keeleseaduse muutus suurendab riigikeele mitteoskajate sunniraha ja trahvi*, 22 January 2025. Available: <https://www.err.ee/1609815540>

³⁴ ERR. *Analüütikud: Eesti töörandepoliitika vajab selgeid põhimõtteid*, 9 May 2025. Available: <https://www.err.ee/1609684298>

³⁵ ERR. *Raul Puusepp: Eesti majandus vajab välistöötajaid appi, aga targalt*, 26 March 2024. Available: <https://www.err.ee/1609317081>

³⁶ ERR. *Lauri Läänemets: Eesti arengut ei saa ehitada odavale tööjõule*, 15 May 2024. Available: <https://www.err.ee/1609673981>

³⁷ Delfi. *Eestisse saabunud tööealistest Ukraina sõjapõgenikest käib tööle iga teine*, 9 March 2023. Available: <https://www.delfi.ee/artikkel/120252554>

³⁸ ERR. *Ukrainast Eestisse tulnud meedikud lähevad reeglina tööle Virumaale*, 21 March 2024. Available: <https://www.err.ee/1609669103>

In summary, while Estonia's media and political debates do not often address qualification recognition directly, the intertwined issues of language policy and migration quotas strongly shape how, and whether, migrants' skills can be matched to suitable employment.

5. Does your country have policies and instruments in place to counter skills mismatching and/or promote skills matching? YES/NO. If yes, please explain how, using the table below, choosing the driver(s) addressed by the policy/instrument, indicating the form(s) of mismatch the policy/instrument aims to address, specifying the target group of the policy/instrument, and adding rows for additional policies/instruments as needed. The mentioned drivers below mirror the ones from Questions 1 and 2 are meant as orientation. Please find examples of how to fill out the table below in the grey column.

Yes

Yes.

Policy/instrument (please explain, indicate the actor and the information source)	Driver(s) for skills mismatch addressed (if possible to identify)	Describe form(s) of mismatch targeted if any/if possible (vertical, horizontal, both)	Target group of the policy/instrument (jobseekers, employees, employers, institutions, other (please specify))	Beneficiaries of the policy/instrument in case policies are targeted (labour migrants, beneficiaries of international protection, beneficiaries of temporary protection; TCNs that arrived via family reunification; others - please specify – e.g. female migrants; elderly migrants (please specify); etc.)
<p>Work in Estonia³⁹ – a national programme under the Estonian Business and Innovation Agency (EIS) that promotes Estonia as an attractive destination for foreign specialists and supports companies in international recruitment. The programme provides information about working and living in Estonia, helping both international talent and employers navigate the process of relocation and employment. International House of Estonia, as part of the Work in Estonia programme, serves as a one-stop-shop for international talent. It brings together key public services and consultations in one place — including</p>	<ul style="list-style-type: none"> ○ Limited labour market information ○ (Lack of) integration policies and practices 	<p>Both</p>	<p>Jobseekers, Employees & Employers</p>	<p>Labour migrants (ICT sector)</p>

³⁹³⁹ Work in Estonia website. Available: https://workinestonia.com/internationalhouse/?utm_source=google&utm_medium=cpc&utm_campaign=search_eis_ihe_ee_en_prm926&utm_content=ihe_settle_in_estonia_en&gad_source=1&gad_campaignid=21208606924&gclid=Cj0KCQjw0NPGBhCDARIsAGAzpp1x1vDODUv4YJNysu9dZarSR0greDDtMV79CnpD-KY23x_ymZEYR4oaAj80EALw_wcB

registration, taxation, employment, housing, and language learning — to make relocation and integration in Estonia as smooth as possible.				
<p>Academic and professional recognition of foreign credentials – In Estonia, foreign higher education degrees and professional qualifications can be recognised to allow access to further education or regulated professions. Academic credentials are assessed by the ENIC/NARIC centre⁴⁰, while professional qualifications for regulated professions are recognised by the relevant professional boards or licensing authorities. This process ensures that foreign-trained professionals meet Estonian standards and can legally work in their profession or continue studies.</p>	<ul style="list-style-type: none"> ○ Career gaps ○ Country of origin-related 	Vertical	Jobseekers, Employees, Institutions	Labour migrants; beneficiaries of international/temporary protection
<p>Estonian Unemployment Insurance Fund⁴¹ –national public employment service providing support for jobseekers, employees and also employers. It offers job-matching, counselling, vocational and language training, and labour-market information services. For employees, they provide various upskilling and reskilling opportunities, including</p>	<ul style="list-style-type: none"> ○ Limited labour market information ○ Career gaps ○ Country of origin-related ○ Gender-related ○ Age-related ○ Language proficiency 	Both	Jobseekers & Employers	Not targeted (although some services are)

⁴⁰ Estonian ENIC/NARIC homepage. Available: <https://harno.ee/en/enicnaric>

⁴¹ Estonian Unemployment Insurance Fund website. Available: <https://www.tootukassa.ee/en>

professional development courses, ICT and digital skills training, and subsidised Estonian language learning. Employers may apply for compensation to cover workplace mentoring, translation costs, and training for employees who are beneficiaries of temporary or international protection.	<ul style="list-style-type: none"> ○ Economic and labour market conditions 			
Settle in Estonia programme ⁴² – free Estonian language courses and adaptation programme provided by Integration Foundation	<ul style="list-style-type: none"> ○ Language proficiency; ○ (Lack of) integration policies and practices 	Horizontal mismatch	Jobseekers & Employees	Not targeted (although programmes differ among groups)
OSKA – Labour Market Monitoring and Skills Forecasting System ⁴³ – mapping future labour market and skills needs, including foreign workforce demand, influencing migration policy.	<ul style="list-style-type: none"> ○ Economic and labour market conditions; ○ Migration laws, policies and practices 	Both	Institutions & Employers	Labour migrants; policy-makers; indirectly benefiting migrants broadly
Migration consultants ⁴⁴ (at the Police and Border Guard Board) – guidance on requirements for working and living in Estonia, including residence permits.	<ul style="list-style-type: none"> ○ Migration laws, policies and practices; ○ Limited labour market information 	Horizontal mismatch	Jobseekers, Employers, Institutions	Labour migrants; Beneficiaries of temporary protection/ international protection; TCNs arriving via family reunification
Amendments to the Aliens Act – Several legislative changes have been introduced to facilitate the entry of skilled and qualified workers in response to skills and	<ul style="list-style-type: none"> ○ Migration laws, policies and practices ○ Economic and labour market conditions 	Vertical mismatch	Employers, Institutions, Jobseekers	Skilled labour migrants; highly qualified third-country nationals

⁴² Settle in Estonia website. Available: <https://settleinestonia.ee/>

⁴³ OSKA website. Available: <https://oska.kutsekoda.ee/en/>

⁴⁴ The Police and Border Guard Board website. Available: <https://www.politsei.ee/en/migration-consultants>

<p>qualification mismatches. These include simplified residence permit procedures for specialists and exemptions from the migration quota in specific cases. Also, according to the planned amendments, a foreigner holding a fixed-term residence permit for employment will be able to change jobs during the validity of the permit without applying for a new one.</p>	<ul style="list-style-type: none"> o Skills and qualification recognition 			
--	--	--	--	--

6. Are there any initiatives to counter skills mismatching and/or promote skills matching implemented by municipalities, interest organisations, employer associations, IGOs or NGOs? YES/NO. If you answer yes, please provide up to a maximum of three initiatives. Please explain, using the table below, choosing the driver(s), indicating the form(s) of mismatch addressed, indicating, if applicable, whether they differentiate between different groups of migrants, and adding rows for additional key initiatives as needed. The mentioned drivers below mirror the ones from Questions 1 and 2 are meant as orientation. Please find an example of how to fill out the table below in the grey column. For another example, see the project 'Talent-based matching of newcomers to employment opportunities'.⁴⁵

Yes. Although most initiatives are targeted at Ukrainian refugees.

Initiative (please explain the initiative, indicate by whom it is implemented and indicate information source)	Driver(s) addressed (if possible, to identify)	Form(s) of mismatch (vertical, horizontal, both)	Target group (labour migrants of third countries, beneficiaries of international protection, beneficiaries of temporary protection; migrants/TCNs that arrived via family reunification; others: female migrants;
---	---	---	--

⁴⁵ For an example for such an initiative see e.g. Global Compact on Refugees, 'Talent-based matching of newcomers to employment opportunities', <https://globalcompactrefugees.org/good-practices/talent-based-matching-newcomers-employment-opportunities>, accessed 5 February 2025.

			elderly migrants (please specify); etc.)
Tartu Vocational Education Centre offers Ukrainian refugees preparatory courses for entering vocational education or the labour market, including initial psychological support and information on career and study opportunities. ⁴⁶	<ul style="list-style-type: none"> ○ Language proficiency ○ Limited labour market information ○ Career gaps ○ (Lack of) integration policies and practices 	Both	Ukrainian beneficiaries of temporary protection
National guidelines prepared for health service providers to support the integration of Ukrainian refugee health care workers into the Estonian health care system. ⁴⁷	<ul style="list-style-type: none"> ○ Language proficiency ○ (Lack of) Integration policies and practices ○ Employer-specific conditions 	Both	Ukrainian beneficiaries of temporary protection (health sector)
Estonian Refugee Council ⁴⁸ – mainly provides counselling and adaptation training but also employment/entrepreneurship support for refugees and displaced persons. Activities include labour market orientation, digital skills training, integration guidance, workshops for legal questions and work skills, as well as targeted programmes such as <i>Edge Up</i> (aimed at	<ul style="list-style-type: none"> ○ Career gaps ○ Limited labour market information ○ (lack of) Integration 	Both	Refugees and displaced persons

⁴⁶ Available: <https://voco.ee/infoks-ukraina-sojapogenikele/>

⁴⁷ Available: https://www.apteekriteliit.ee/failid/Ukraina_tervishoiutootajad_juhis_TTOdele_30.03.2022.pdf

⁴⁸ Estonian Refugee Council webpage. Available: <https://pagulasabi.ee/en>

jobseekers with a refugee background who wish to enter the labour market or move to a more suitable position)	policies and practices;		
Tallinn Migration Centre ⁴⁹ – integration support for migrants and refugees: Offers a wide range of support to all migrants in Tallinn, including counselling, practical assistance, psychosocial support, guidance on public services, and workshops. While services cover many areas of integration, they also include support related to employment, vocational skills, and Estonian language learning, helping migrants navigate the labour market and develop relevant skills.	<ul style="list-style-type: none"> ○ Career gaps ○ Limited labour market information ○ (lack of) Integration policies and practices 	Both	All migrants
	○		

⁴⁹ Tallinn Migration Centre webpage. Available: <https://www.tallinn.ee/en/randekeskus>

3. Section 4: Skills Matching Challenges

In this section, NCPs are asked to identify the main challenges that their country faces with regards to countering skills mismatch among migrant groups based on available reports and studies, and expert opinions (policy makers, government agencies, international organisations, civil society organisations including migrant-led organisations, etc.).

7. Does your country face any challenges in addressing skill mismatching of migrants? Please explain, if you face any, and indicate the information source (according to whom this is a challenge).

YES

8. What are the underlying causes for these challenges? Please explain and indicate the information source (according to whom this is an underlying cause).

Please answer to questions 7 and 8 jointly by filling out the table below, explaining the challenge, indicating according to whom this is considered a challenge, indicating the group that is mostly affected, indicating the relevant form(s) of mismatch of this challenge, explaining the underlying cause(s) for this challenge and indicating according to whom this is considered as underlying cause(s):

Challenge (please explain and indicate information source)	Group this challenge mostly affects, if applicable (labour migrants, beneficiaries of international protection, beneficiaries of temporary protection; persons that arrived via family reunification; others: female migrants; elderly migrants; etc.)	Form(s) of mismatch (vertical, horizontal, both)	Underlying cause(s) for this challenge (please explain and indicate information source)
<p>Limited access to Estonian language training. Language learning opportunities provided by the state are in high demand, but available places in free language courses fill up very quickly. As a result, many interested participants are unable to enrol, even though language proficiency is one of the key factors enabling migrants to find employment</p>	<p>All third-country nationals</p>	<p>Both</p>	<p>The demand for Estonian language courses exceeds supply, resulting in waiting lists and limited accessibility. Course schedules may not match learners' needs (e.g. due to work or childcare).</p>

corresponding to their qualifications. ⁵⁰			
Difficulty in involving foreign labour in healthcare, social care, and education sectors due to qualification and language requirements.	Labour migrants, beneficiaries of international and temporary protection	Vertical	Requirement for nationally recognized qualifications and Estonian language proficiency in regulated professions. Sector-specific requirements for language proficiency and qualification alignment; lack of tailored support.
Ukrainian war refugees with relatively high education levels are mostly employed in low-skilled jobs.	Beneficiaries of temporary protection (Ukrainian refugees)	Vertical	Lack of Estonian language skills and unrecognized qualifications prevent access to jobs matching their education. As the Ukrainian refugees were compelled to leave their home country abruptly, they were not able to collect necessary documentation and needed to find a job quickly after arriving – usually low-skilled work.

4. Section 5: Skills matching Lessons Learned & Good Practices

In this section, NCPs are asked to share lessons learned and good practices in tackling migrant skills mismatch, in tackling the challenges identified in Section 4 and/or promoting their sustainable labour market integration through skills matching.

9. Are there any good and implemented practices to counter the identified challenges or to counter skills mismatching and/or promote skills matching for migrants in your country that have been identified by your country?

YES/NO. If yes, please explain, using the table below, indicating the information source (according to whom this is a good practice), choosing the cause(s)/challenges addressed by the good practice, indicating the form(s) of mismatch addressed, indicating, if applicable, whether they differentiate between different groups of migrants, and adding rows for additional good practices as needed.

Good practice (please explain the practice and how it has affected/ameliorated the skills matching;	Cause (s) /Challenges addressed (if possible, to identify)	Form(s) of mismatch (vertical, horizontal, both)	Target group (labour migrants, beneficiaries of international
---	--	--	---

⁵⁰ Information provided by an expert from Work in Estonia (07.10.2025).

indicate information source)			protection, beneficiaries of temporary protection; third country nationals that arrived via family reunification; others: female migrants; elderly migrants (please specify); etc.)
Language Cafés by the International House of Estonia, these informal sessions allow international talent to practise verbal Estonian in a social setting, enhancing communication skills and confidence in professional contexts.	Lack of practical language practice; limited opportunities for verbal communication	Vertical	Targeted at international talent working in Estonia, including labour migrants and TCNs
Language training and integration support: Free or subsidized Estonian language courses and integration programmes help migrants acquire the language skills needed for employment in regulated professions (e.g., healthcare, education, social care). This increases their chances to access jobs matching their qualifications.	Lack of Estonian language skills; barriers to entering regulated professions	Vertical	All migrant groups, with special focus on beneficiaries of international and temporary protection
Recognition of foreign qualifications: The Estonian ENIC/NARIC centre evaluates and recognizes foreign qualifications, enabling migrants to work in their trained professions.	Non-recognition of foreign qualifications; difficulties accessing regulated professions	Vertical	All migrant groups, especially those in regulated professions (e.g., healthcare, education)
Targeted labour market measures: The Estonian Unemployment Insurance Fund provides tailored support, including career	Barriers to labour market entry; lack of local work experience;	Both vertical and horizontal	All migrant groups

<p>counselling, job mediation, and (language) training. Special programmes for Ukrainian refugees support their entry into the labour market and upskilling. For example Ukrainian refugees demonstrated high motivation to learn Estonian quickly in order to work in their field.⁵¹</p>	<p>skills mismatch</p>		
--	------------------------	--	--

10. Are there any lessons learned (i.e. insights that are not necessarily put into practice yet, but are important to consider for future policymaking) regarding effective measures to counter skills mismatching of migrants and/or promote skills matching for migrant groups? YES/NO. If yes, please elaborate and indicate the information source (according to whom this is a lesson learned).

No.

Section 6: Conclusions

In this final section, NCPs are asked to provide concluding reflections based on their analysis of sections 2-5. **The questions proposed below shall simply support NCPs to reflect the main topics of the study template and to synthesise/link the main points:**

- How prevalent is the skills mismatching of migrants in your country?
- What are the main drivers for skills mismatching of migrants in your country?
- How do the policies in your country respond to the phenomenon of skills mismatch of migrants and/or promote skills matching?
- What are your country’s lessons learned, good practices, and challenges in regard to tackling skills mismatching/promoting sustainable labour market integration of migrants through skills matching?

Skills mismatching among migrants in Estonia is moderately prevalent, particularly among beneficiaries of international and temporary protection. Although Estonia’s labour market integration outcomes are generally positive, many migrants—especially those with higher education—work below their qualification level. For example, Ukrainian refugees with academic or professional backgrounds are often employed in low-skilled positions due to language and qualification recognition barriers.

The main drivers of skills mismatch in Estonia are related to insufficient Estonian language proficiency, the complexity of qualification recognition processes, and differences in education systems between countries of origin and the EU. In regulated professions, both language and professional requirements are high, which delays or prevents employment

⁵¹ Information provided by an expert from the Estonian Unemployment Insurance Fund (29.09.2025).

in the person's field. Socio-demographic factors such as gender and age also contribute, as women with childcare responsibilities and older migrants face additional challenges.

Policies addressing skills mismatch are embedded within broader integration and labour market frameworks. Estonia has established a clear legal and institutional basis for qualification recognition through the ENIC/NARIC Centre, operating under the Education and Youth Board. The procedures comply with the Lisbon Recognition Convention, including Article VII, which allows for the evaluation of undocumented qualifications for refugees and displaced persons. Integration measures, such as the *Settle in Estonia* programme and language training provided by the Integration Foundation, support linguistic and social integration. The Estonian Unemployment Insurance Fund plays a central role through career counselling, training, mentoring, and subsidies to employers.

Recent amendments to the Aliens Act have aimed to make the system more flexible and to attract skilled workers to fill labour shortages. Employers may hire foreign specialists more easily in specific sectors, particularly in ICT. However, the annual migration quota and strict language requirements continue to limit the full potential of skills utilisation.

Good practices include the free evaluation of qualifications by ENIC/NARIC, mentoring schemes supported by the Unemployment Insurance Fund, and the one-stop services offered by the *International House of Estonia*. These initiatives have supported faster entry into the labour market and smoother integration for many newcomers.

Nevertheless, persistent challenges remain. Limited language course capacity, lengthy recognition procedures, and the lack of targeted measures for specific migrant groups continue to affect outcomes. While Estonia's institutional structure is well developed, addressing skills mismatching requires more focused coordination between migration, education and labour policies. Continuous investment in language training, flexible recognition pathways—particularly for regulated professions—and closer cooperation with employers will be key to ensuring that migrants' skills are fully recognised and utilised within Estonia's labour market.