

Housing



Climate and Physical Conditions

Location Evaluation Report

Pollution

Disease and Sanitation

Medical Facilities

Education Facilities

ORC's hardship ratings for cities around the world

Infrastructure

Physical Remoteness

Political Violence and Repression

Political and Social Environment

Crime

Communications

Cultural and Recreation Facilities

Availability of Goods and Services



Tallinn, Estonia
January 2005

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This report has been prepared by ORC Worldwide in collaboration with Control Risks Group. CRG is the primary source of data for the sections on the political situation, crime, and infrastructure; ORC is the primary source for the other sections. Bennett Educational Resources, a school and college consulting firm, has assisted in the development of information on educational facilities.

ORC is wholly responsible for the final structure and content of the reports, including the weighting system and the ratings for specific categories.

While every effort is made to ensure that the information contained in this report is accurate and current at the time of publication, the report is intended as a guide to compensation and not as a substitute for appropriate professional advice.

Part I. Factor Ratings

Tallinn, Estonia

Tallinn is located in northwestern Estonia on the Gulf of Finland. It is the country's capital, as well as an important port and center for trade and industry. Tallinn has a population of 397,150 (2003 figure); the city is relatively congestion free.

Evaluation Rating

- 1 = Acceptable
- 2 = Some problems exist
- 3 = An important drawback to the location
- 4 = A major problem
- 5 = Very severe conditions

FACTOR	RATING	DESCRIPTION
Housing	2	<p>Tallinn is a well-preserved medieval city that has a strong German feel. Many areas are scenic, with winding streets and attractive parks. Neighborhoods preferred by expatriates include the Old Town and Kadriorg in the city center, near many embassies. Piritä, a residential area to the northwest, has more detached houses and good road connections. More moderately priced houses are available in Nõmme and Kakumäe; the former is an older residential neighborhood, also with good road connections to the city, and the latter an area once mostly of summer houses but now home to residents year-round.</p> <p>The supply of housing, though improving, does not always meet demand. In general, availability is better for apartments, both furnished and unfurnished, than for houses, but it really depends on the area. Central areas offer mostly apartments, while outlying areas offer mostly houses. Apartments generally have two or three bedrooms and one bathroom, houses three bedrooms and two bathrooms. Even in the most sought-after locations, housing may not be completely modernized, and electricity and plumbing may not be adequate for expatriates' needs. Electricity is used for cooking and heating (air-conditioning is generally not necessary). Armored doors and alarm systems are standard—and recommended—security measures. Secure parking facilities are highly valued, as car theft is a problem.</p> <p>For information on current housing costs in this location, please refer to the ORC Typical Expatriate Housing Costs for Tallinn.</p>

FACTOR	RATING	DESCRIPTION
Climate and Physical Conditions	3	<p>In general, the weather here is cool and humid, and most days are cloudy. Temperatures average between 12° and 20°C (54° and 68°F) in July and between -10° and -4°C (14° and 25°F) in January.</p> <p>The Baltics' northern location means that mid-summer days are typically cool, with long hours of daylight, while winters are cold and snowy. Winter is particularly difficult for those not used to extreme cold. Apart from low temperatures, there is very little sunshine—two hours or less a day between October and February. And November through January average 18 or more days with precipitation each month. Average annual precipitation is 585 millimeters (23 inches).</p> <p>The terrain is mostly marshes and lowlands. There are only slight variations in the low elevation, which averages about 50 meters (164 feet); the highest elevation is 380 meters (1,246 feet). Flooding is an occasional hazard, especially in the spring when rain and melting snow cause rivers to overflow.</p>
Pollution	2	<p>Air pollution derives mainly from vehicular emissions and industry—the country's thermal plants (which burn fossil fuels), oil-burning power plants, chemical factories, and paper plants have contributed to high levels of sulfur dioxide in the air. Levels of suspended particulates and carbon dioxide are also a concern.</p> <p>Water pollution is a problem in some areas along the coast, as well as in lakes, where the pollutants are mostly organic waste. Groundwater and soil may be contaminated by petroleum products. There is also concern over chemical contamination near former Soviet military bases.</p>
Disease and Sanitation	2	<p>Colds, bronchial problems, and flu are common during the winter. Other common diseases include measles and diphtheria—a recent outbreak of diphtheria in the region is now largely under control, but the risk of contracting the disease remains, so expatriates should be sure their inoculations are up to date.</p> <p>Unsanitary food-handling and contaminated water can cause hepatitis and typhoid, among other diseases. Tap water is not potable; the recommendation is to drink bottled water or water that has been boiled and filtered. Precautions are also necessary with fresh or undercooked foods, especially fish, which may host tapeworms. Special care is needed in rural areas, not only with uncooked food but also around</p>

FACTOR	RATING	DESCRIPTION
Disease and Sanitation <i>(continued)</i>	2	<p>unfamiliar or wild animals (because of rabies). Insect-borne diseases are not generally a threat—there is no risk for malaria or yellow fever, for example—but hikers should take precautions against tick bites to prevent encephalitis and Lyme disease.</p> <p>While no vaccinations are required to enter the country, vaccinations for hepatitis A and B, rabies (for those at high risk for animal bites), and typhoid are recommended, along with boosters for tetanus-diphtheria, measles, and polio. Some medical providers recommend a flu shot. Expatriates seeking a work or residence permit must take an HIV test (test results from the home country are generally accepted).</p>
Medical Facilities	3	<p>Medical facilities, though improving, do not meet international standards. Qualified medical professionals can be found, but facilities often lack equipment. There may also be shortages of some basic medicines and supplies.</p> <p>This location does have an international SOS facility, called BaltAssist, as well as a number of private facilities expatriates can use for routine care, including the Esmed Medical Center and the Tallinn Mustamäe Hospital. Given the general quality of medical care in Tallinn, however, many expatriates go to Sweden, just a short flight away, for treatment.</p> <p>While there are pharmacies available locally, expatriates may wish to bring a supply of any prescription medications they need from home.</p>
Education Facilities	3	<p>Tallinn has just one international school, the International School of Estonia. Opened in 1995, it offers an international curriculum for grade levels prekindergarten to grade 12 (ages three to 18), which includes the primary and middle years and diploma programs of the international baccalaureate. The current enrollment totals approximately 110—most students are from Scandinavia and other Western European countries, about 10 percent are from North America, and about 15 percent from Estonia. The school plans to seek U.S. accreditation. Its academic year runs from August to June.</p> <p>There is no French school in this location, nor are there any teaching a strictly U.S. or U.K. curriculum.</p>

FACTOR	RATING	DESCRIPTION
Infrastructure	2	<p>Electricity, water, and gas supplies are generally reliable. Telephone services are also reliable, and cell phones are available. Postal services are rather slow and not always dependable, but foreign courier services are available.</p> <p>Although the road system is well developed, the condition of some roads is poor—icy roads are a particular hazard during the winter months. Expatriates who want to drive themselves should be aware that driving standards here are poor and drivers aggressive. Public buses are often overcrowded, but walking may be an option; central Tallinn is compact and can be crossed on foot.</p> <p>Banking services are adequate for basic needs.</p>
Physical Remoteness	3	<p>The availability of nonstop international flights is limited, mostly providing service within Europe. Other international flights typically make at least one connection—usually either in Helsinki (also accessible by ferry or hydrofoil) or Copenhagen.</p> <p>The nonstops to Europe include flights every day to London, Frankfurt, Copenhagen, Helsinki, Stockholm, Warsaw, and Prague, taking between a half hour (to Helsinki) to three hours (to London). For travel to North America there are flights to New York on six days a week and to Miami on three days; both trips connect in Helsinki, for total travel time of 12 and 14.5 hours, respectively. Service to Asia includes daily flights to Tokyo that connect in Copenhagen, taking 12 hours in total, and flights to Shanghai on three days and to Hong Kong on two—both trips involve a connection in Helsinki, for travel time of ten-and-a-half hours to Shanghai and 16 hours to Hong Kong (the connecting flight to Hong Kong makes a stop).</p> <p>For travel within the region nonstops go to Riga and to Vilnius. Flights to either city are available on five days and take about an hour.</p> <p>Although expatriates can enjoy recreational travel within Estonia, the country's location at the northern edge of Europe makes land travel outside the country more difficult.</p>
Political Violence and Repression	1	<p>Estonia has been politically stable since independence from the Soviet Union in 1991, and that stability faces no immediate threat. Nevertheless, political infighting, scandals, and mismanagement have prompted repeated changes of government.</p> <p>Politically motivated violence is rare.</p>

FACTOR	RATING	DESCRIPTION
Political and Social Environment	1	<p>Although Estonian society tends to be reserved and formal, it is also generally liberal, especially among the young. The press is free, and political and cultural activities are unrestricted for the most part.</p> <p>There is some underlying racism toward non-Caucasians; expatriates, however, are unlikely to encounter serious discrimination. There is also interethnic tension between Estonians and ethnic Russians, who have limited political rights. Women face no legal restrictions, but chauvinistic attitudes persist.</p> <p>Income levels for most people fall below the average in Western Europe but are generally adequate for local conditions.</p> <p>Low-level corruption among public officials is widespread.</p>
Crime	2	<p>Crime rates are low, and violent crime against foreigners is rare. Petty crime is not a serious problem either. But there is some risk of mugging in parks, in the Old Town area, near hotels, and on poorly lit city streets at night. And vehicle theft is a significant problem, with Western-made cars a popular target. Also of growing concern is credit card fraud.</p> <p>Occasional bombings in public areas usually involve local business disputes or organized crime; typically the aim is to damage property rather than to cause personal injury. The government is waging a sustained campaign against organized crime, which is expected to reduce the number of these incidents. In any event, such attacks tend not to target foreigners.</p> <p>The police are generally approachable, but they are not always efficient.</p>
Communications	1	<p>Communications generally do not create a major obstacle for expatriates. While Estonian is the official language, many Tallinn residents also speak English (widely spoken among the younger generation), Russian, or German. Other Baltic languages are heard as well.</p> <p>The <i>Baltic Times</i>, an English-language weekly, provides local, Baltic, and international news. Expatriates can also find international newspapers and magazines at newsstands and major hotels.</p> <p>Estonian national radio broadcasts in eight languages, including English. Cable and satellite television provide international programming.</p>

FACTOR	RATING	DESCRIPTION
<p>Cultural and Recreation Facilities</p>	<p>1</p>	<p>Tallinn has numerous performing-arts venues, museums, and other cultural institutions. The city—famous for its song and choral traditions—also hosts music festivals. Some movie theaters show foreign-language films. For nightlife there are restaurants, bars, cafés, and nightclubs.</p> <p>Cross-country skiing is popular near Tallinn, and the city has indoor and outdoor rinks for ice-skating. Cyclists can take advantage of uncrowded roads and the generally flat terrain, while camping and hiking are almost national pastimes. Popular spectator sports include soccer and basketball. There are numerous health clubs, and a golf course some 34 kilometers (21 miles) from the city. The nearby coast offers opportunities for water sports.</p>
<p>Availability of Goods and Services</p>	<p>2</p>	<p>The supply of goods and services in this location is improving. Expatriates often shop at major department stores such as Stockmann (a Finnish chain) and Prisma.</p> <p>Most food items, including imports, are available, as are household goods. While some stores here do carry high-end designer labels, it may be difficult to find quality clothing that is more affordable; some expatriates purchase what they need outside the country.</p>

Part II. Overall Evaluation

Tallinn, Estonia

The weather can seem harsh to some expatriates, and Tallinn's location at the northern edge of Europe can feel isolated. Limited educational and medical facilities are additional concerns. ORC recommends a location premium of 10 percent of base pay for Tallinn. *The ratings and premium recommendation have not changed from the previous report.*

Evaluation rating: 1 = Acceptable; 2 = some problems exist; 3 = an important drawback to the location; 4 = a major problem; 5 = very severe conditions.

FACTOR	RATING	WEIGHT %	POINTS
Housing	2	5	10
Climate and Physical Conditions	3	9	27
Pollution	2	6	12
Disease and Sanitation	2	15	30
Medical Facilities	3	8	24
Education Facilities	3	4	12
Infrastructure	2	6	12
Physical Remoteness	3	6	18
Political Violence and Repression	1	8	8
Political and Social Environment	1	11	11
Crime	2	9	18
Communications	1	4	4
Cultural and Recreation Facilities	1	4	4
Availability of Goods and Services	2	5	10
Evaluation score			200
ORC recommended location premium			10%

Note: Points are calculated by multiplying the rating by the weight; ratings of 4 or 5, however, have a value of 5 and 8, respectively.

Part III. How to Use This Report

Purpose

ORC has designed this location evaluation report to help companies decide whether assignees transferred to the location should receive additional compensation for living there and, if so, what that additional compensation should be.

Through ranking and weighting systems that measure factors in day-to-day life, the report emphasizes those things that make the location undesirable for the expatriate and any accompanying family. While certain factors may make a location a difficult place for a company to do business—for example, the lack of a clear legal structure for company operations—they may affect the expatriate only in their potential to make the job more arduous, not in daily living. (Indeed, it may be the accompanying family members, who do not spend part of their time in the relative insulation of the workplace, who suffer the greater burden.)

Of course, all expatriates are not affected equally by the conditions discussed in this report. Individuals' ability to tolerate climatic factors, for example, varies. Family status also plays a part in the relevance of the conditions; single employees need not be concerned by such issues as education. The report has been designed to reflect the impact of the location on a broad cross section of employees. Where clients feel that their circumstances or those of some of their expatriates differ from our assumptions, ORC can tailor the methodology to fit their specific needs.

Rating 14 Factors

The location is evaluated on the basis of 14 factors. These factors cover the very broad range of elements that make up life in the assignment location: housing, climate and physical conditions, pollution, disease and sanitation, medical facilities, education facilities, infrastructure, physical remoteness, political violence and repression, political and social environment, crime, communications, cultural and recreation facilities, and the availability of goods and services. (See the table at the end of Part III for a description of each factor.)

Each factor has a weighting that determines its contribution to the overall rating of the location. The weighting is similar to weighting in cost-of-living indexes; it determines the relative importance of that particular factor. ORC has formulated the weighting from our existing data on hardship (derived in part from a number of surveys we have conducted).

Factors are rated on a scale of 1 to 5, where 1 represents acceptable conditions and 5 represents very severe problems:

- 1 = Acceptable
- 2 = Some problems exist
- 3 = An important drawback to the location
- 4 = A major problem
- 5 = Very severe conditions

The overall rating, expressed as a number of “points,” is produced by multiplying the factor weight by the rating. By definition, the overall rating, or total points, for a location that is acceptable on all criteria is 100.

Ratings of 4 or 5, however, contribute an additional amount to the calculation. This “enhanced” impact of major problem areas is designed to meet one of the criticisms of most existing evaluation systems. Generally, there are several factors that contribute to a recommendation for additional compensation, and conventional rating systems work well for these situations. The undesirability of some locations, however, is heavily or completely driven by just one or two factors. Normal weighting systems tend to underestimate the very negative effect of these one or two major factors, and produce a compensation recommendation lower than what is warranted. The enhanced rating is designed to correct this problem.

All evaluation systems require some subjective judgments, both in regard to the factors to be taken into account and their weight and ranking. While every effort has been made to minimize this subjectivity, there is no system that can remove it entirely. For this reason ORC provides a full explanation of the weighting and ranking systems; clients can see how the numbers are produced and adjust the criteria if they wish, or ORC can work with the client to produce a report using methodology tailored to its specifications.

Structure of Reports

The location evaluation report begins with a brief description of the city. Each of the 14 factors is then described, and the resulting rating given for the factor. An overall evaluation in narrative form follows, together with the recommended compensation payment (if any). A summary sheet shows the calculation of the rating for the location in terms of weights and ratings for each category.

Compensation Recommendation

In order to arrive at a recommendation on compensating expatriates, ORC bands locations into seven categories by level of difficulty. For those locations where the total points rating is below 150, ORC does not recommend any additional compensation. Most locations in Western Europe, North America, and Australia/New Zealand fall into this category, along with a number in Latin America and Asia. For locations where the points rating is over 150, ORC recommends the following payments:

Points	Percentage of Base Pay
150–175	5%
176–210	10
211–250	15
251–300	20
301–350	25
Over 350	30

Client Adaptation

Some clients may feel that ORC's compensation recommendations are too generous, others that they are not generous enough. Recognizing that individual conditions may vary for organizations, ORC encourages clients to view these data as a starting point from which they can set different levels of payment, if necessary. Certainly, it is ORC's intention that clients have sufficient information to make their own adjustments to the points rating and the consequent compensation, if they so wish. This methodology can also be used to rate locations for which we do not supply data.

It is our belief that in most circumstances a location premium of 30 percent (in addition to any across-the-board foreign service or mobility premium) is sufficient incentive. The most extreme locations, however, may call for a higher level of payment. A number of factors may go into this decision—the infrastructure the company is able to provide in the location, the number of expatriates there, and so forth. ORC is prepared to work with clients in tailoring the recommendation to their circumstances.

We recognize that some clients pay a separately identified “hardship” payment or “location premium”; in these instances the organization may also pay a foreign service premium (FSP) or mobility premium. In other cases, organizations pay a location allowance that includes both a basic incentive (usually paid for all locations) and a hardship element that varies by location. ORC's recommendations are made on the assumption that the client will make a separate decision about whether to pay an FSP or mobility premium. ORC's recommended payment would therefore be *in addition to* any across-the-board incentive that the client feels is necessary to attract employees to go on the assignment.

In a few, particularly volatile locations, some companies have followed the recommendation of the U.S. State Department to pay an additional “danger pay” allowance. ORC reports are written on the assumption that the client does not provide such an allowance. ORC will continue to advise clients of locations where the State Department recommends danger pay, and how clients that choose to make such payments should adjust the ORC recommended hardship payment, if at all.

Applicability to Different Nationalities

There are different views on whether a compensation recommendation should apply equally to nationals of all countries assigned to a particular location or whether the recommendation should vary according to nationality. Some argue that an assignee from a location where there is already a degree of hardship should not receive the same payment as an assignee from a nonhardship location.

ORC's data are provided with the explicit recommendation that the payment be made *equally* to all assignees in the location *regardless of nationality*, for the following reasons:

- Most of the factors are not culturally influenced. The risk of crime or poor medical conditions affects all employees.
- The conditions that generate a payment in one location may be quite different from those that generate a payment in another. If an expatriate

from a country where the payment is influenced by climate and crime goes to another location, where the payment relates to disease and sanitation and infrastructure, it hardly seems logical to reduce that person's payment relative to what is paid other expatriates.

- There is a clear risk of perceived inequity if an employee from a less developed country receives less than other expatriates do.
- The location evaluations are not written to compare one location to another. There is no "base" location; conditions that are described have no comparison point. This underlying premise reinforces the fact that the reports are not designed to reflect the conditions for any particular nationality, and varying the recommendation by home nationality would not be appropriate.

FACTOR	DESCRIPTION
Housing	<ul style="list-style-type: none"> • The availability and quality of housing for expatriates • The availability of a wide selection of types of housing (apartments, detached houses, etc.) • The quality of neighborhoods in which expatriate housing is located (presence of facilities such as parks, etc.) • Restrictions on housing choice • The need for compound living • Limitations due to crime or security considerations • Distance of expatriate housing (physical distance, commuting time) from major business centers • The reliability of utilities (electricity, water, gas)
Climate and Physical Conditions	<ul style="list-style-type: none"> • The existence and duration of conditions of excessive heat, humidity, cold, rainfall, or lack of sunlight • The risk of major climatic problems, such as monsoons or hurricanes • The altitude of the location • The risk of earthquakes and other nonclimatic natural disasters
Pollution	<ul style="list-style-type: none"> • The severity of atmospheric pollution; covers man-made pollution, such as emissions from cars and industrial facilities, and naturally arising problems, such as excessive dust • Water pollution • Radiation problems from nuclear facilities • Noise pollution

FACTOR	DESCRIPTION
Disease and Sanitation	<ul style="list-style-type: none"> • The existence of health risks for assignees, including the incidence of endemic communicable diseases • The quality of public sanitation, sewage, and other waste-disposal systems and water supplies • The need to boil water or use bottled water • The need to treat fresh food prior to use • The presence of vermin, insects, pests, rabid animals, etc. • Requirements and/or recommendations regarding vaccinations
Medical Facilities	<ul style="list-style-type: none"> • The availability and quality of health care facilities and competent medical staff • The availability of staff who speak a major world language • The availability of pharmaceutical products • The need to leave the location <ul style="list-style-type: none"> » For major medical treatment » For most medical treatment
Education Facilities	<ul style="list-style-type: none"> • The availability and quality of schools suitable for expatriate children • The convenience of education facilities' location
Infrastructure	<ul style="list-style-type: none"> • The availability, quality, and reliability of telephone and postal systems, and of electricity, gas, and water supplies, and the quality of basic communal services such as public transport • The quality and extent of the road system and the degree of traffic congestion • The degree to which it is inadvisable for an expatriate to drive in the location
Physical Remoteness	<ul style="list-style-type: none"> • The geographic isolation of the location within its own country: time to get to and from the nearest major city; frequency, availability, and reliability of air travel to and from the city; and distance to the nearest major airport • Security and safety issues connected with domestic travel • The elapsed time and difficulty of getting to and from major locations in other countries; includes the availability, frequency, and reliability of air travel to and from major external locations • The sense of isolation that may be experienced in locations such as small islands

FACTOR	DESCRIPTION
Political Violence and Repression	<ul style="list-style-type: none"> • The risk of political violence in general, from either internal or external sources, and the specific risk to assignees • The risk of terrorist or guerilla activities, directed either at expatriates or at the government • The degree of government repression of social, political, or ethnic groups within the country (e.g., imprisonment of government opponents; military or police action against them)
Political and Social Environment	<ul style="list-style-type: none"> • The degree of freedom of political, religious, and social expression and action in the location • How much freedom of movement assignees have • Basic respect for human rights • Freedom of the press • Restrictions on the role of women; includes restrictions in employment, being allowed to drive a car, and dress, arising either from legal or social norms • Tolerance of different religions, lifestyles, etc. • The extent of corruption among public officials • The degree of poverty of the local population
Crime	<ul style="list-style-type: none"> • The risk of crime, to both person and property • The degree to which the possibility of crime limits lifestyle, because of the need for security precautions or to avoid certain neighborhoods • The efficiency of the local police force
Communications	<ul style="list-style-type: none"> • The understanding of those major world languages most used by expatriates (English, French, Spanish, German, and Japanese) • The availability of international newspapers, books, videos, television including cable TV, etc. • The degree of censorship in the location, either from direct government regulation or from the strength of local social norms
Cultural and Recreation Facilities	<ul style="list-style-type: none"> • The availability and range of choice of social clubs, sports facilities, music, museums, nightlife, and restaurants • The existence of theater and cinema in a major world language

FACTOR	DESCRIPTION
Availability of Goods and Services	<ul style="list-style-type: none">• The availability of goods at a level of quality that would be sought by an expatriate• The regular unavailability of goods and services or periodic interruptions in their availability• The availability of food supplies—fruit, vegetables, and meat—at a level of hygiene enabling expatriates to purchase with confidence• Restrictions on the availability of specific types of items, such as alcoholic drinks• The availability of clothing and footwear in sizes and styles appropriate for expatriates

About ORC Worldwide

ORC Worldwide is an international human resources consulting firm dedicated to advancing the art, knowledge, and practice of organizational and human relationships. Drawing on its research and in-depth experience, ORC works with clients to develop policies and practices that motivate their employees to contribute more effectively to the profitability and success of the organization.

ORC provides a variety of services to clients. It

- Helps clients respond effectively to a wide range of human resources management issues and problems, including those related to developing and managing a global workforce
- Develops, evaluates, and disseminates a wide range of data and information, on compensation and other areas of human resources management, to keep human resources managers abreast of trends, emerging issues, and the practices of other companies
- Through established networks and meeting groups, provides human resources leaders with the means to exchange information and share experiences

ORC is a principal adviser on expatriate policies and practices to many of the world's largest public and private sector organizations. With the world's largest private database on expatriate compensation policies and practices, ORC provides international compensation data to more than 1,800 employers. More than 250 global corporations participate in numerous ongoing ORC-sponsored international roundtables in North America and Europe.

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Bennett Educational Resources

For more information call Georgia Bennett in the United States (610-692-9096).

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