

REPORT

UKRAINIAN REFUGEES

VOCATIONAL ACTIVATION IN GERMANY AND IN POLAND



A report from the sociological study 'Ukrainian refugees – vocational activation in Germany and in Poland' conducted by the EWL Migration Platform, Foundation for the Support of Migrants on the Labour Market 'EWL' and the Centre for East European Studies at the University of Warsaw.

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ANDRZEJ KORKUS

EWL Group
Chairman of the Board

It has been six months since the outbreak of war in Ukraine, which has left a strong mark on the socio-economic situation of European countries, also because of

the scale of migration, which is unique in world history. The European Union has widely opened its borders to Ukrainian refugees, offering a simplified way of residence legalisation, providing free access to public services and the labour market.

Ukrainian refugees have shown that they need to have the proverbial fishing rod, not fish. Our study, carried out together with partners from the Centre for East European Studies at the University of Warsaw this spring, showed that the majority of adult refugees from Ukraine residing in Poland and Germany planned to take up employment.

Poland has achieved unprecedented success not only in the area of aid, but also in vocational activation of Ukrainian citizens fleeing the war. Since its outbreak, more than 430 thousand refugees, i.e. approx. 2/3 of the working-age refugees (670 thousand), have found employment. So far, no country in history has ever succeeded in providing employment for such a number of refugees.

At the same time, I would add that the Polish labour market has coped with this challenge better than expected and the level of unemployment in Poland is at a record low. We want to share our long-standing experience with our European partners, especially the countries many refugees have arrived in and where unemployment remains low. Such countries have the greatest potential for vocational activation of the refugees, which is one of the key factors in supporting the people who are fleeing war-stricken Ukraine. Therefore, we conducted a study among refugees from Ukraine residing and working in Poland and Germany.

What are Polish best practices? For years, Poland has been regarded as one of the most important destinations for the migration of workers from the East and a country that is able to utilise their potential, providing in return invaluable opportunities of development. This is evidenced by Ukrainian nationals fluent in Polish, who are more and more often employed in leadership and managerial positions. They ensure effective communication during the induction procedures of new Ukrainian employees who do not yet speak Polish. A special mention should also be made of the assistance of Polish entrepreneurs in providing accommodation for cross-border workers.

*For these reasons Poland, which has a much smaller market and far fewer vacancies, has been able to activate twice as many Ukrainian refugees than much larger German economy. **Our aim is to share our experience and technology with partners and clients in other European countries that have great potential to help refugees from Ukraine.***

I invite you to read the study.



JAN MALICKI, DR H.C.

Director of the Centre
for East European
Studies at the University
of Warsaw

For the past six months, a war triggered by Russian

imperialism has been going on in Ukraine, determining the new shape of the political, economic and social reality. According to latest UN data, more than 4 million Ukrainian refugees have been granted temporary protection in European countries. Half of all the refugees is staying in two countries: Poland and Germany. Therefore, together with our regular partner, the EWL Migration Platform, we decided to ask refugees from Ukraine in these countries to compare different aspects of their stay.

Our recent study, we conducted this spring, showed that one of the greatest needs of Ukrainian refugees in Poland, the Czech Republic and Romania was the desire for work, but one of the biggest concerns was the difficulty with finding it. Poland has proved in a short time that it is able to effectively help Ukrainian citizens in vocational activation. This is what determined the topic of our latest study aimed exclusively at refugees from Ukraine, who have already taken up employment in Poland and Germany. Such a rapid pace of vocational activation of refugees is connected with the need for constant monitoring of the dynamically changing moods among this research group, in order to know whether we are moving in the right direction.

It is worth emphasising that, compared to other European countries, it is Poland that stands out for its long-standing experience of cooperation with Ukrainian citizens, to whom it owes the satisfaction of the growing needs of employers and a noticeable contribution to the development of the Polish economy. The example set by consistent activities towards the sustainable integration of Ukrainian refugees into Polish society, results in the evolution of employer attitudes in the European labour market. These activities also result in best practices in the area of employment of workers from the East, defining contemporary standards and ways of their implementation by employers.

We present to you the results of the recent study, which is a continuation of the research at the Centre for East European Studies at the University of Warsaw. I am convinced that it will allow for a better understanding of the situation of Ukrainian refugees working in Poland and Germany, and will share Polish successes in the field of vocational activation with the rest of Europe.

Enjoy your read.

KEY FIGURES

Refugees in Poland

N=400



71% of respondents came to Poland with their children

14% of respondents chose Poland as a country of refuge for the possibilities of employment

48% of respondents are planning to stay in Poland for longer (but only 6% want to stay permanently)

47% of respondents declare knowledge of Polish at least at a communicative level

68% of refugees employed in Poland are able to communicate in Ukrainian in the workplace

54% of respondents are currently learning Polish

26% of respondents are highly skilled professionals

50% of the respondents received help from the employer in finding accommodation

77% of respondents declare that they are vaccinated against COVID-19

€ **541** are the average monthly earnings (net) of refugees in Poland

Refugees in Germany

N=400



55% of respondents came to Germany with their children

22% 22% of respondents chose Germany as a country of refuge for the possibilities of employment

48% of respondents are planning to stay in Germany for longer (but only 3% want to stay permanently)

45% of respondents declare knowledge of German at least at a communicative level

16% of refugees employed in Germany are able to communicate in Ukrainian in the workplace

57% of respondents are currently learning German

17% of respondents are highly skilled professionals

36% of the respondents received help from the employer in finding accommodation

77% of respondents declare that they are vaccinated against COVID-19

€ **1467** are the average monthly earnings (net) of refugees in Germany



Poland has achieved unprecedented success in vocational activation of Ukrainian citizens.

Since the outbreak of the war, more than 430 thousand refugees, i.e. approx. 2/3 of the working-age refugees, have found employment. So far, no country in history has ever managed to provide employment for such a number of refugees.

The average age of refugees working in Poland and Germany is 39 and 37 years old respectively. This indicates a high share of professionally formed people, often with higher education, unique experience and qualifications.

More than half of the refugees in Poland (53%) and Germany (55%) do not speak the language of the respective country or know it poorly. Good or very good knowledge of the language is confirmed by only 13% of refugees working in Poland and 18% in Germany. This is particularly important from the perspective of vocational activation of refugees from Ukraine, which requires the introduction of language courses to improve the language competences of those willing to work.

An important advantage of Poland is the elimination of the language barrier by employing Ukrainians who speak Polish in leadership positions. They are a guarantee of efficient induction of foreigners who do not yet speak Polish and of effective communication between them and the Polish employers. The study showed that 68% of refugees in

Polish workplaces are able to communicate in Ukrainian. In Germany this percentage is four times lower.

Half of Ukrainian refugees residing in Poland declare that they received assistance from the employer in finding accommodation.

In Germany, such assistance was given to 36% of Ukrainian citizens. It is worth noting that in Poland the provision of accommodation is traditionally in the interest of the employer and is often the employer's responsibility.

Average monthly earnings in Germany are almost three times higher than in Poland.

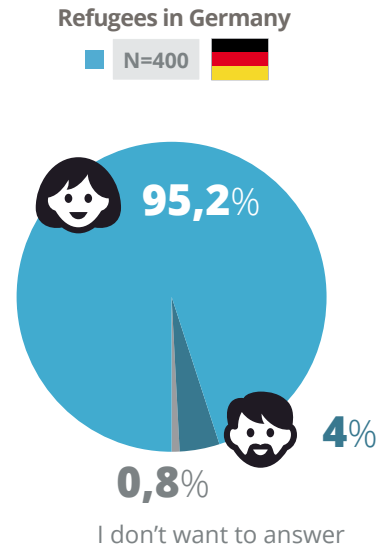
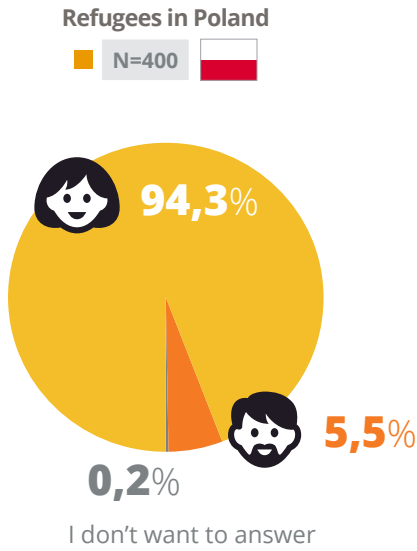
The biggest difference in earnings concerns administrative and office work and the logistics and transport sector. On the other hand, the smallest disproportions in remuneration are visible in the trade and services sector.

Approximately 1/5 of respondents in both countries admit to upgrading their professional qualifications through courses and training.

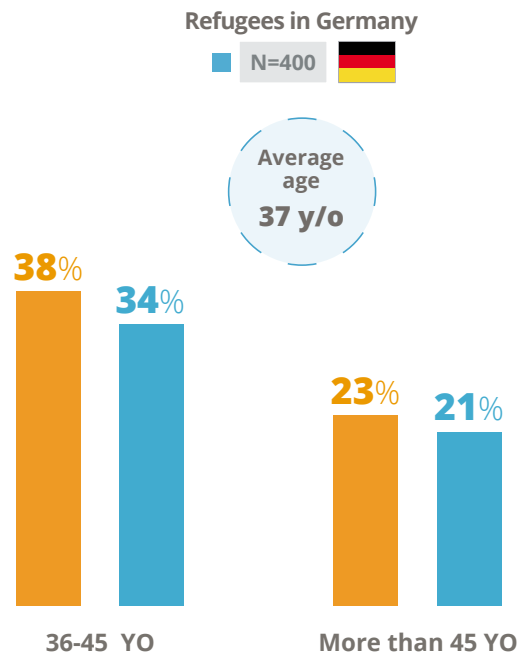
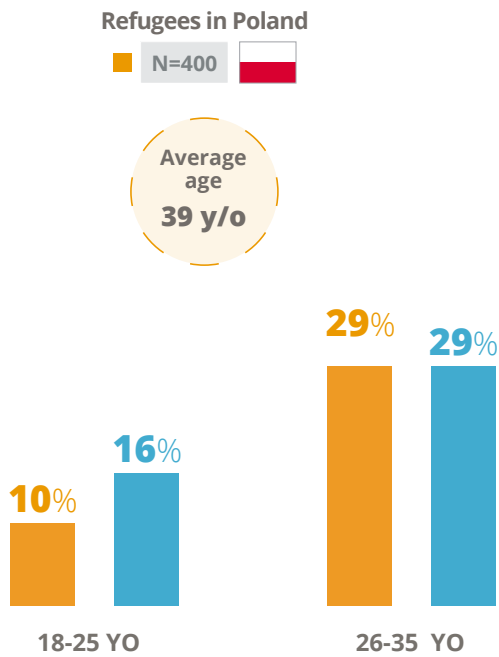
Nearly 40% of respondents in Poland and Germany declare the intention to increase their level of skills in the future, which indicates a high professional potential of the refugees who express the readiness to take advantage of various forms of professional development. More than 80% of refugees working in Poland are already learning Polish or are planning to do so. It is just over 60% among the refugees working in Germany.

RESPONDENT PROFILE: GENDER, AGE

Gender



Age



When analysing the profile of participants in terms of demographic data, it should be noted that there is a clear **predominance of women** among the working adult refugees residing in Poland and Germany. The higher proportion of women in the study is the result of the introduction of martial law in Ukraine and the associated ban on leaving the country by men aged between 18 and 60 (with some exceptions).

The largest group of refugees from Ukraine staying in Poland and Germany are people between the ages of 36 and 45.

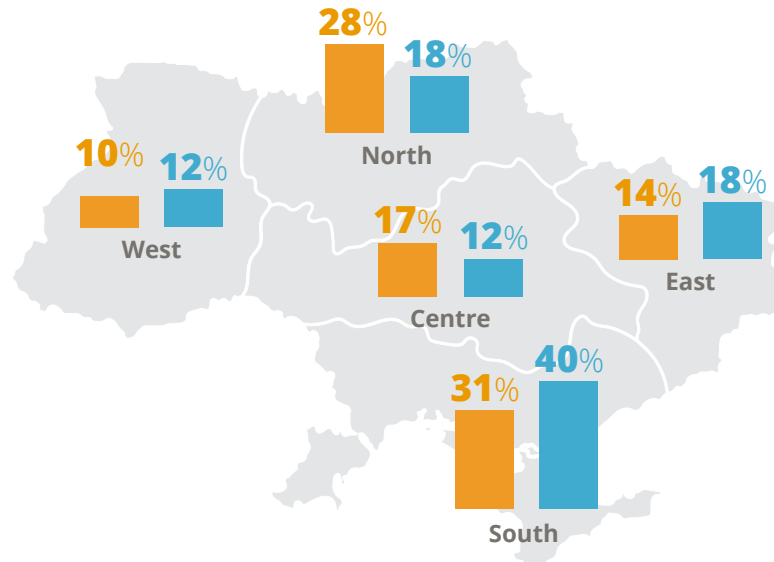
The **average age** of refugees working in Poland and Germany is 39 and 37 years old respectively, which indicates a high share of professionally formed people with experience and qualifications, and very often with higher or incomplete higher education. It is noteworthy that in Germany more young people, aged 18-25 (around 16%), are taking up employment. In Poland this age group accounts for 10% of all working refugees. This may be due to the greater ability and willingness of international mobility of young people, for whom Germany is the country of first choice.

Region of residence in Ukraine

Refugees in Poland

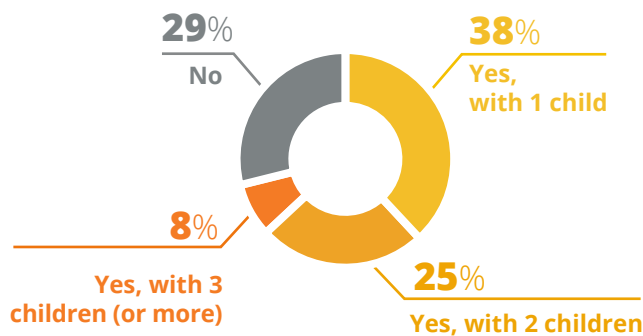


Refugees in Germany

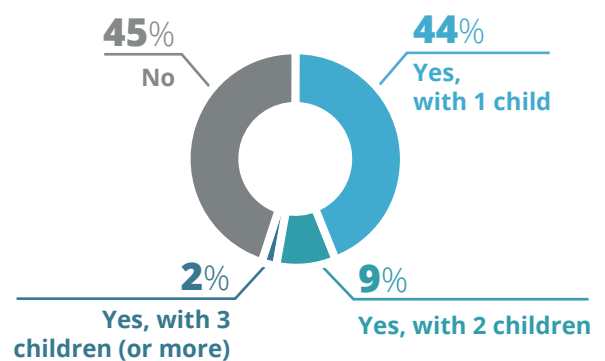


Did you arrive with children under 18 y/o?

Refugees in Poland



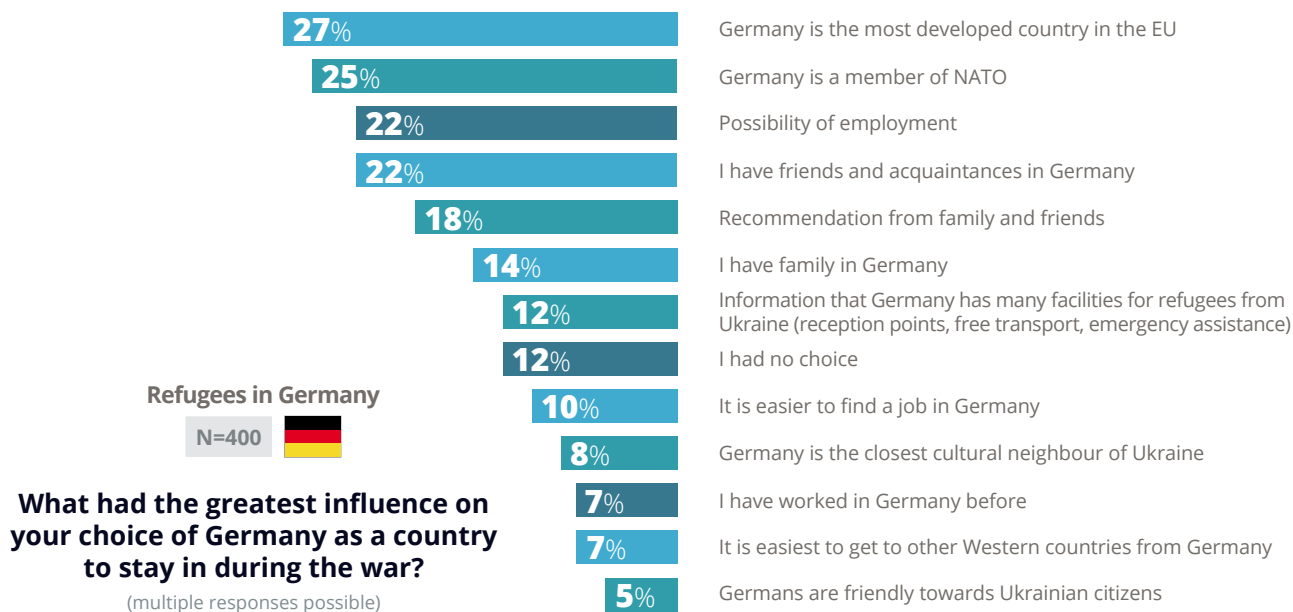
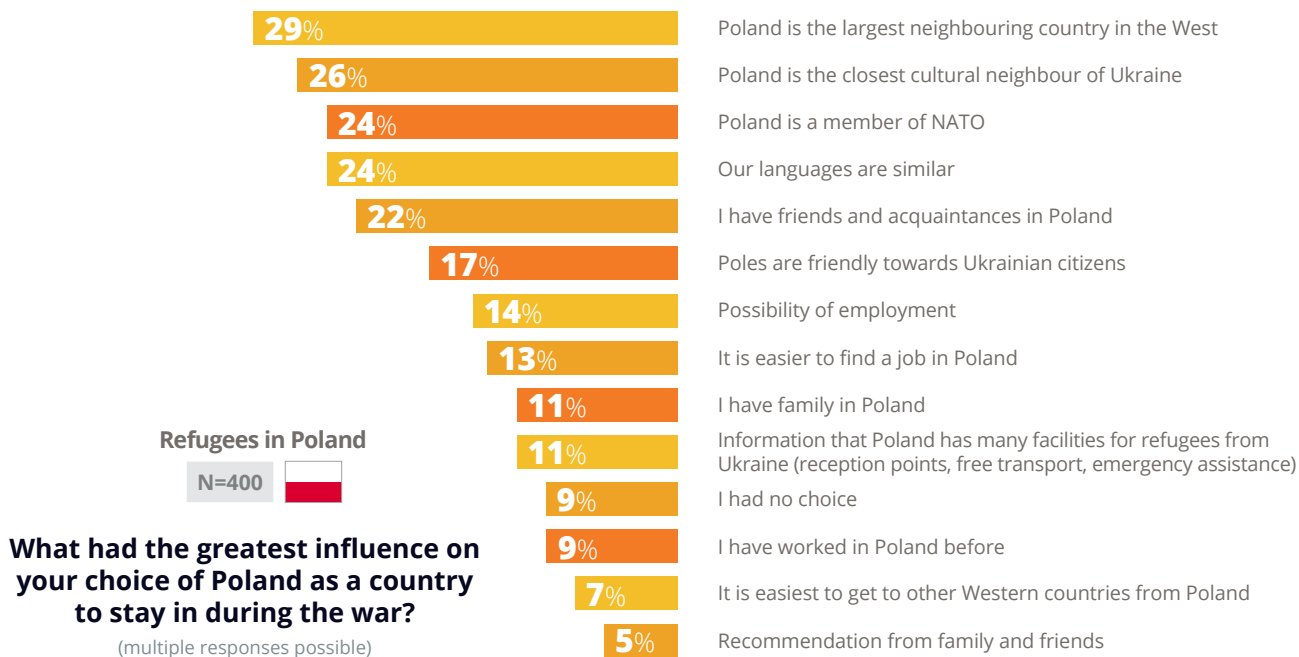
Refugees in Germany



Refugees from Ukraine, currently working and residing in Poland or Germany, come from different regions of their country. Among them, the largest number have come from the **south of Ukraine**, which has been under the most intense fighting since the beginning of the war, along with the eastern part of the country, as well as from the north – a region where the attack of the Russian occupiers

was repelled, but left massive destruction.

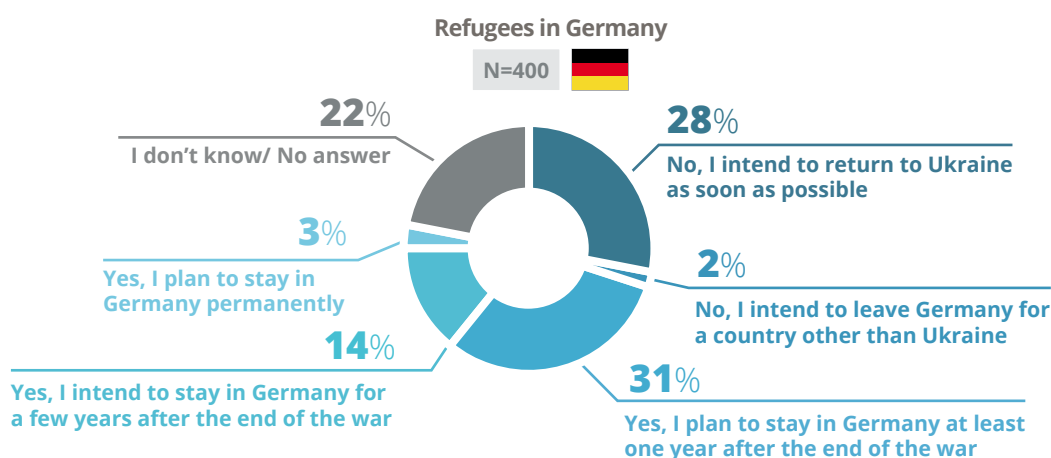
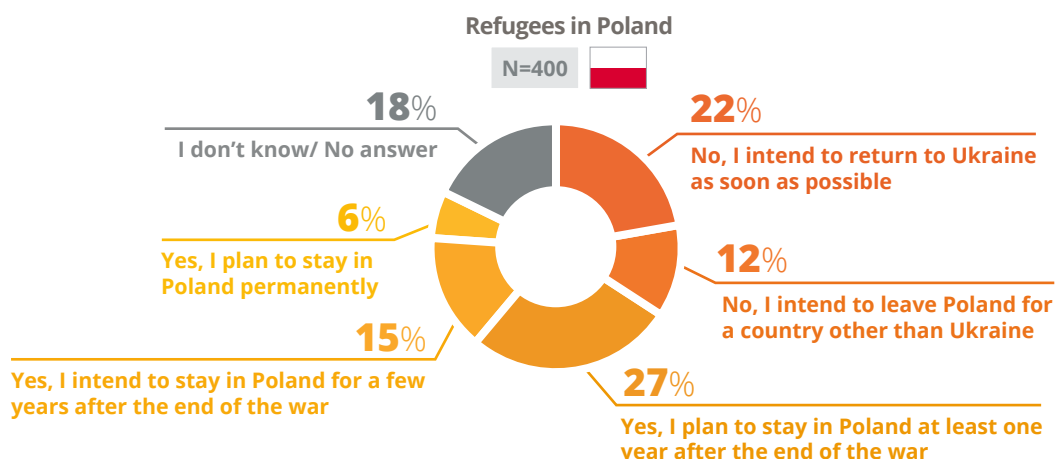
The vast majority of refugees employed in Poland (71%) have children, while in Germany it is 55%. One of the factors influencing the fact that more parents with children came to Poland may be the desire to shorten the travel distance in order to reduce the stress of unexpected difficulties.



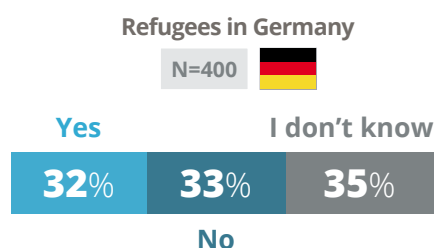
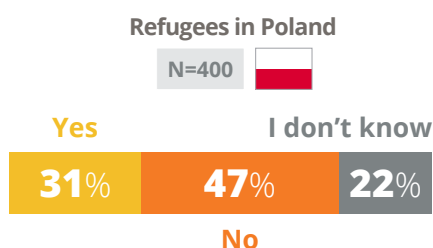
Refugees from Ukraine most often come to Poland as a result of the perception of Poland as **the largest neighbouring country to the west** (29%), **the feeling of cultural proximity** (26%) as well as **having friends and acquaintances** (22%). A significant role in this respect is played by the long-standing experience of Poland and Ukraine in the processes of integration and cooperation in the light of labour migration, which contributed to the emergence of a 1.5-million-strong Ukrainian community in Poland.

Refugees from Ukraine residing and working in Germany, indicate that it is, in their opinion, **the most developed country in the EU** (27%), which is not without significance in the context of **greater employment opportunities** (22%), which are an important motive for the choice of the destination country for refugee migration. Among other main reasons that determine coming to Germany are recommendations from family and friends (18%) and the country's membership of NATO (25%).

Are you planning to stay in the country of your current residence for longer?



Are your relatives planning to join you in the country of your current residence?



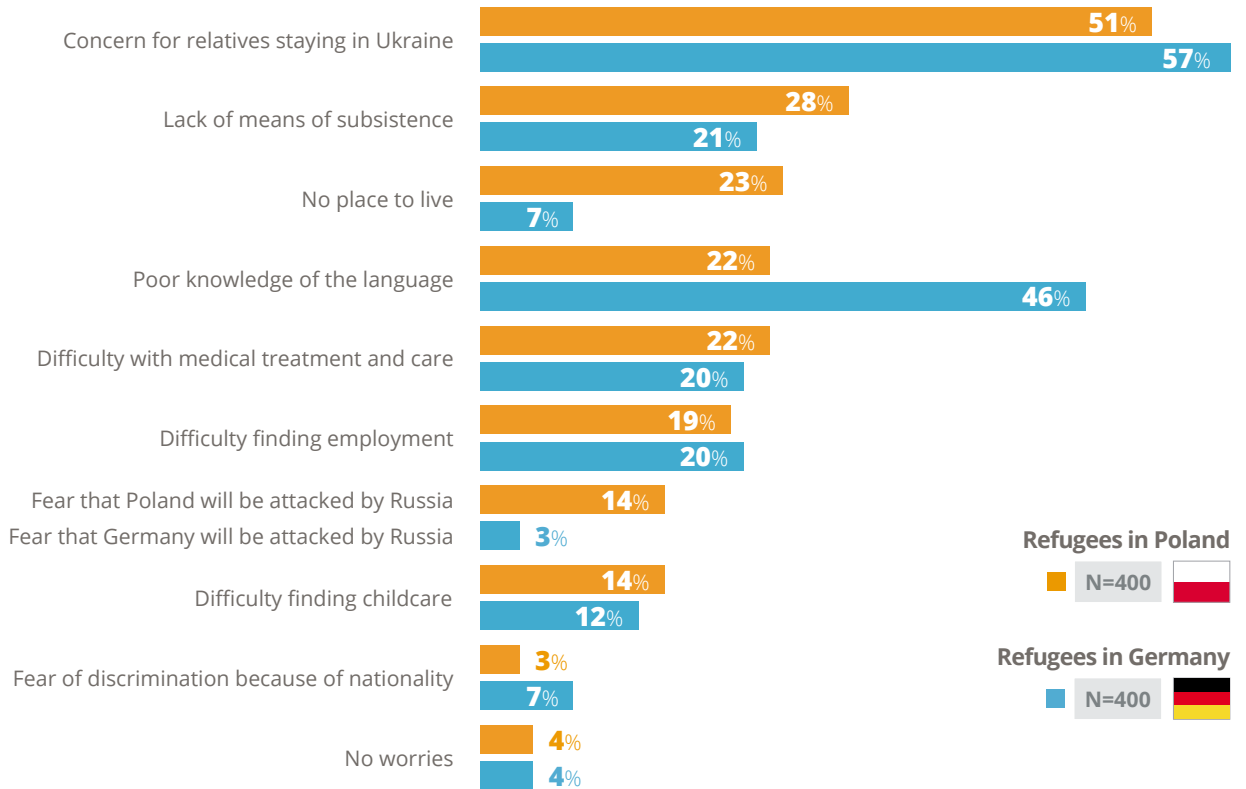
The majority of refugees working in Germany (73%) and almost 2/3 of those in Poland (64%) **intend to return to Ukraine in the near or long term**. 28% of refugees residing in Germany want to return to their country as soon as possible. This may be due to the difficulties accompanying the process of integration into a more culturally distant society, as well as problems with learning German. On the other hand, coming to Germany is an opportunity to earn more money in a shorter period. The income and career goals of adult refugees from Ukraine may motivate them to take up employment in this country. It is worth highlighting that almost half (48%) of those surveyed in both countries **intend to stay for a longer period, namely for at least**

one year after the end of the war. However, the situation was different for Poland in the previous report „Ukrainian refugees in Poland, the Czech Republic and Romania“, which covered all refugees arriving after 24 February, not just working refugees – more than 56% of them wanted to return to Ukraine as soon as possible.

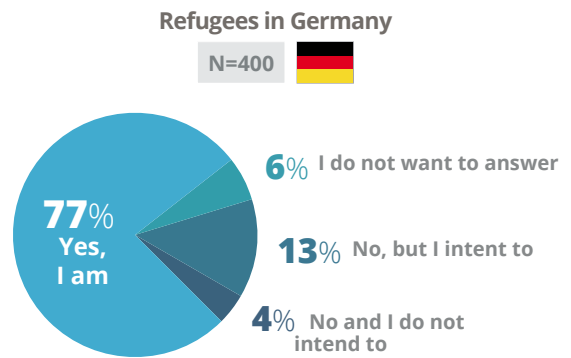
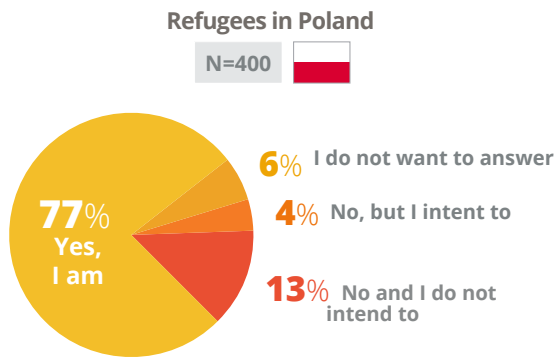
Around a third of respondents in both, Poland and Germany, declare a **desire to bring their relatives to the country of their temporary residence**. This fact is a premise for considering further potential waves of migration in the event of the deterioration of the feeling of safety of citizens in Ukraine due to the ongoing war.

What are your concerns about living abroad?

(multiple responses allowed)



Are you vaccinated against COVID-19?



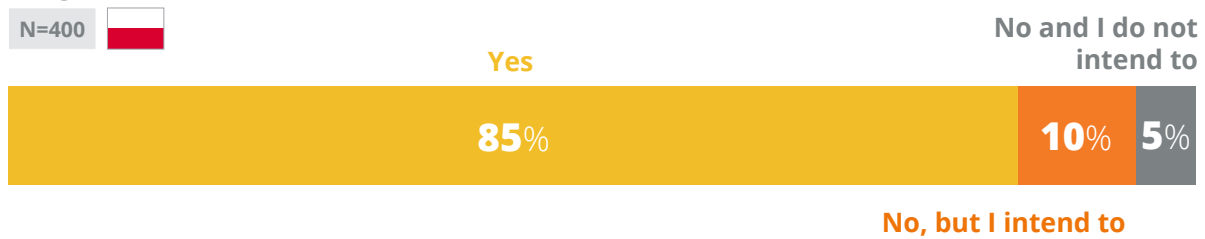
The main concern of more than half of the refugees from Ukraine residing and working in Poland (51%), as well as in Germany (57%) is the **concern for relatives remaining in Ukraine**. In the case of respondents from Germany it is also the **poor knowledge of German** (46%), which may determine their plans regarding taking up employment and staying in the country for the long term. Refugees from Ukraine in Germany are less worried about their **means of subsistence** (21%), compared to those residing in Poland (28%), which may be influenced by the potentially higher earnings, as well as the higher standard of living achievable in Germany. The issue of availability and price of accommodation is an issue for 23% of Ukrainian refugees working in Poland, while in Germany this is only the case for 7%. Noteworthy is the response regarding safety – only 3% of refugees residing in Germany are concerned that Russia

will attack this country, while for a similar fear concerning Poland is 14%. The vast majority of working respondents, as many as 77% in each of the countries surveyed, declare that **they have been vaccinated against COVID-19**. Furthermore, 13% of respondents in Germany declare their willingness to get vaccinated. One of the main reasons for this may be mandatory vaccination at the workplace in both Poland and Germany, as well as organised vaccination campaigns at the workplace.

It is worth mentioning that, compared to the 2021 study (Report on Cross-border Mobility), there has been a significant increase in the percentage of vaccinated Ukrainian citizens working in Poland. In December 2021 it was 42%. The difference lies in the selection of the research sample – only working refugees participated in the current survey.

Have you applied for temporary protection in the country of your current residence?

Refugees in Poland

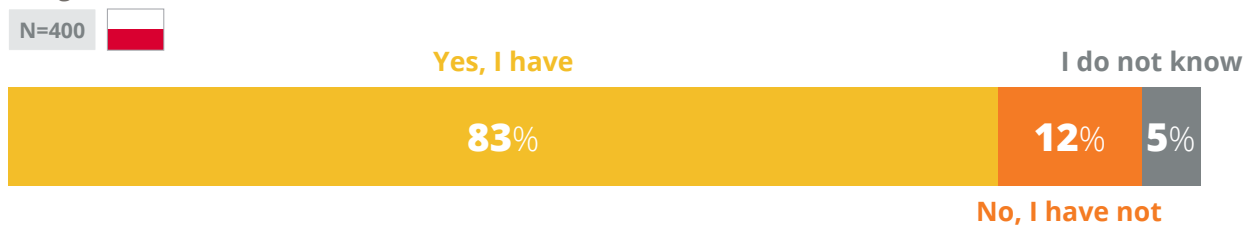


Refugees in Germany

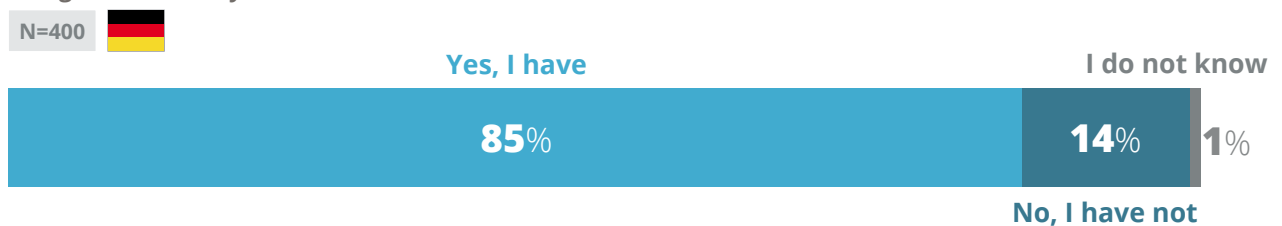


In addition to remuneration for your work, have you received financial aid in the country of your current residence?

Refugees in Poland



Refugees in Germany

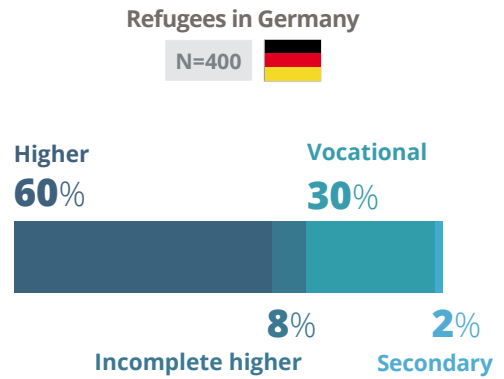
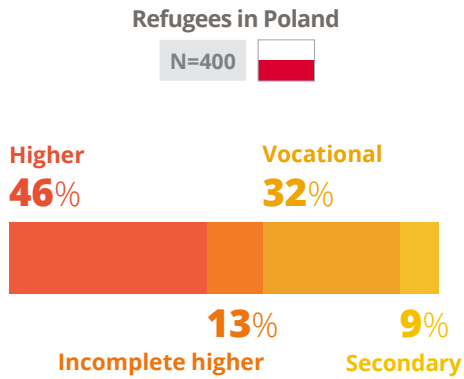


The vast majority of Ukrainian citizens applied for temporary protection – in Poland 84%, and in Germany 73%. According to data from UNHCR, the UN Refugee Agency, as of 1 September 2022 temporary protection or similar national protection schemes in Europe have been applied to a total of more than 4 million refugees from Ukraine. In Poland, more than 1.3 million Ukrainian nationals have been granted protection, and in Germany more than 670,000.

It should be mentioned that refugees benefiting from temporary protection in the EU are entitled to a number of rights in the form of access to the labour market, medical care, social aid or education.

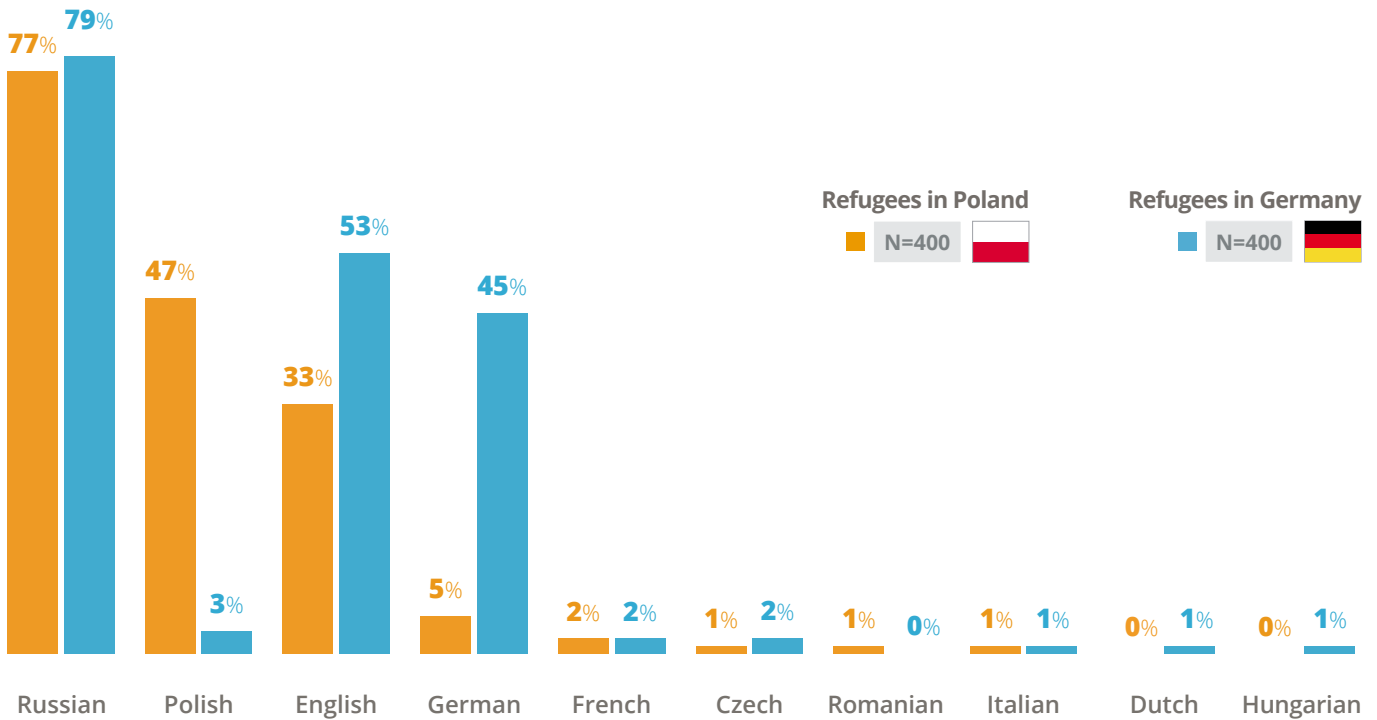
The vast majority (over 80%) of respondents in both Poland and Germany admitted to having received financial aid in the country of their current residence.

Education



Which languages do you speak at least at a communicative level?

(multiple responses possible)



Refugees working in Poland and Germany present a **very high level of education**. In Poland 59% of those surveyed have higher or incomplete higher education, while in Germany it is 68%. This may be due to the fact that Germany, which is not a direct neighbour of Ukraine, has become a destination country of migration for a group of war refugees, who speak German or English and consider taking up stable work and staying in this country for the long term.

However, a **low level of language skills of the countries in which they have arrived is worrying**. More than half of the refugees in Poland (53%) and Germany (55%) do not speak the language of the respective country or know it poorly. Good or very good knowledge of the language is confirmed by only 13% of refugees working in Poland and 18% in Germany. This fact is particularly important from the perspective of vocational activation of refugees from Ukraine, which requires the introduction of free language courses in order to improve the language competences of those expressing willingness and readiness to work.

How would you rate your knowledge of Polish?

Refugees in Poland

N=400



Fluent and very good



Good



Average



Bad



Very bad/I do not speak Polish



How would you rate your knowledge of German?

Refugees in Germany

N=400



Fluent and very good



Good



Average



Bad



Very bad/I do not speak German



How would you rate your knowledge of English?

Refugees in Poland

N=400



Fluent and very good



Good



Average



Bad



Very bad/I do not speak English



Refugees in Germany

N=400



Fluent and very good



Good



Average



Bad



Very bad/I do not speak English

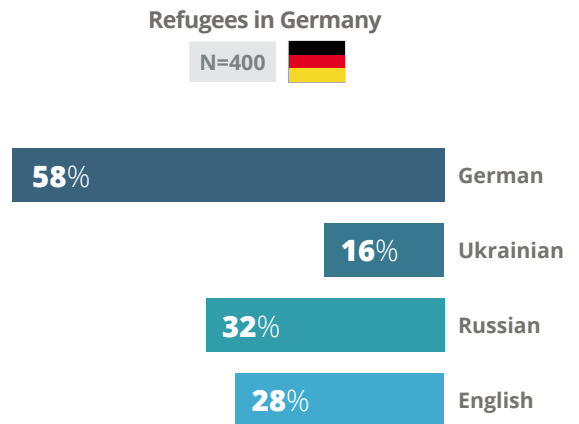
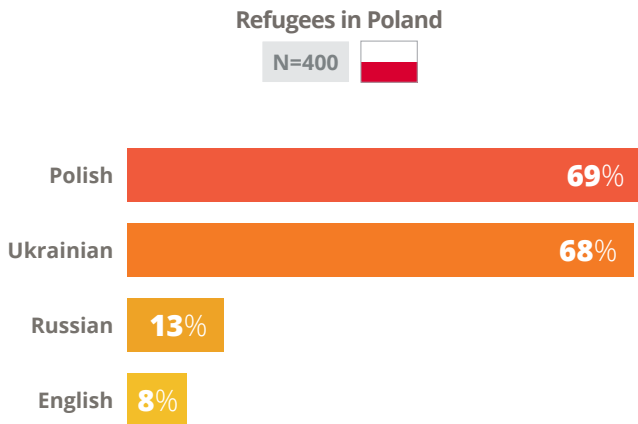


One in five Ukrainian refugees working in Germany **speaks English at a good level**, which may result from the significant proportion of young people (16%) aged 18-25 in the survey in Germany. The awareness of the benefits of foreign language skills is increasingly higher among young people aspiring to work under better conditions with the prospect of professional as well as personal development.

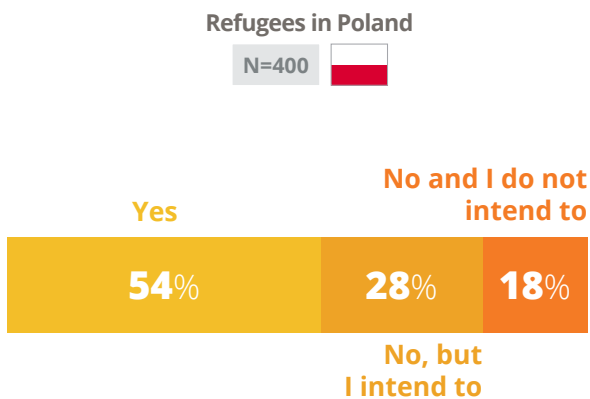
According to the results, more than half of the refugees in Germany (53%) confirm their knowledge of English at least at a communicative level, and 45% can communicate in German. In the case of refugees from Ukraine working in Poland, almost half (47%) declare their knowledge of Polish at least at a communicative level, and of English – 33%.

What languages do you communicate in at work in the country of your current residence?

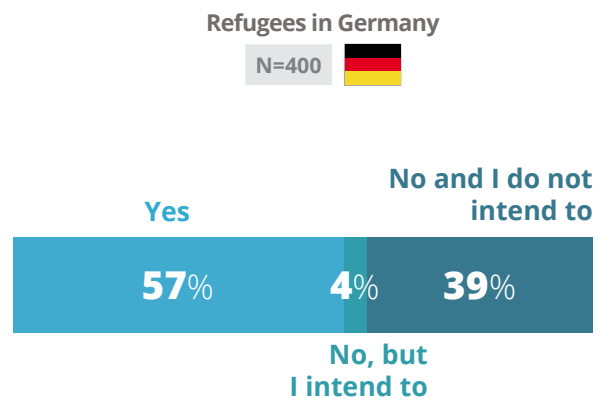
(multiple responses possible)



Are you currently learning Polish?



Are you currently learning German?



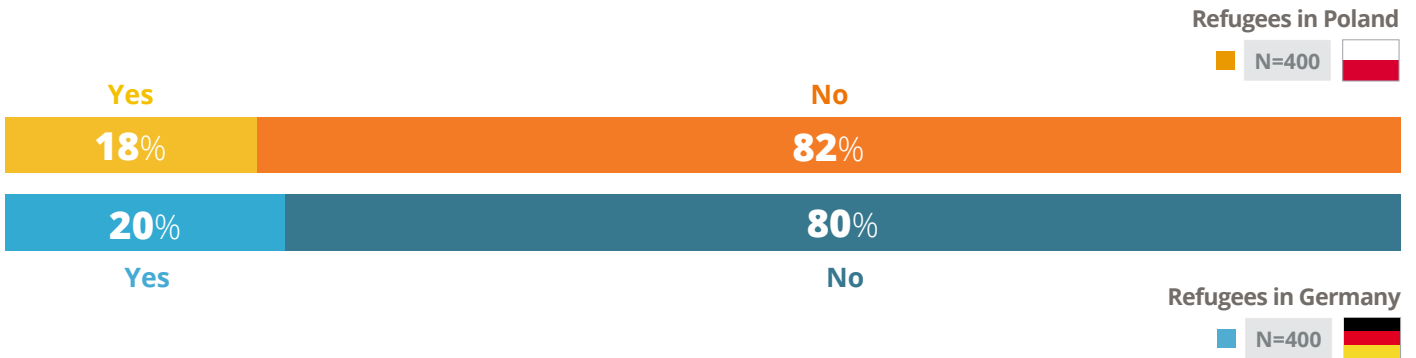
69% of respondents in Poland indicate that they communicate in Polish at their workplace in the country of current residence. More than half (54%) confirm that **they are learning Polish**, while 28% show willingness to start learning. This fact deserves attention in the context of permanent integration of Ukrainian refugees into Polish society also in the labour market. It should be noted, however, that **up to 68% of refugees communicate in Ukrainian in Polish workplaces**. This means that the key role in this process is played by Ukrainian nationals in leadership positions, fluent in Polish, who are the guarantors of efficient and effective communication

between employees of Ukrainian nationality and the Polish employers.

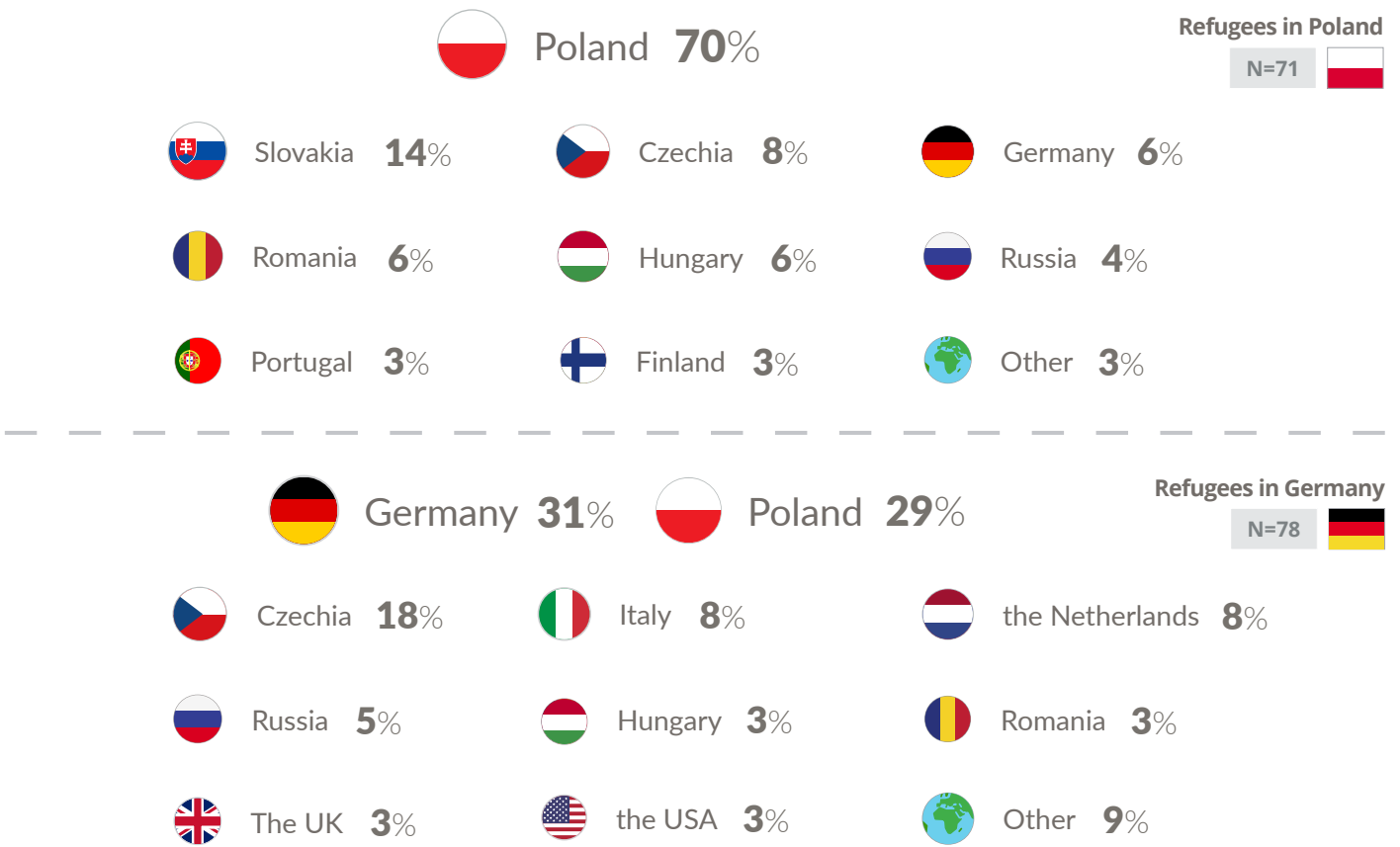
Refugees from Ukraine working in Germany speak mainly German at their workplace (58%), although Russian is used just as often (32%) or English, as declared by 28% of respondents. More than half of the respondents (57%) residing in Germany indicate that they are learning German. Around 39% admit that they do not want to and do not intend to take up German, which may result from a fear of difficulties in learning the language or the short-term nature of the refugee stay in the country.

PROFESSIONAL EXPERIENCE

Have you worked abroad before?



Which foreign countries did you work in before the outbreak of war?



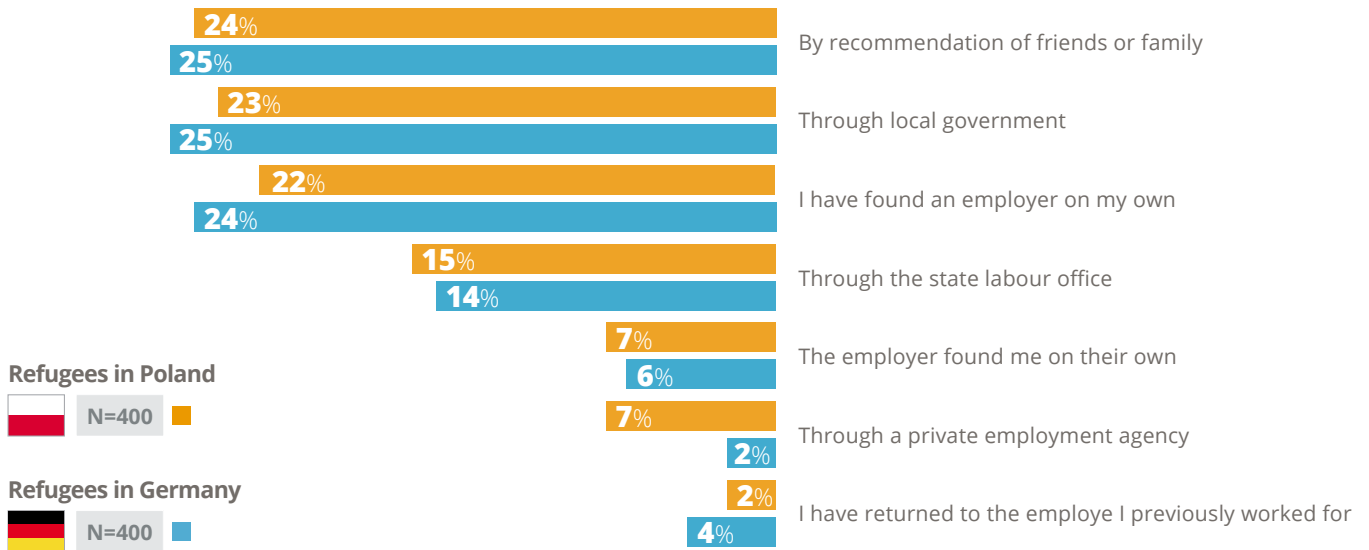
Nearly one in five respondents in both countries worked abroad before the outbreak of the war, which indicates a high proportion of people with several years of experience in the labour market. Also, they are often linguistically advanced.

70% of refugees residing in Poland with experience of working abroad admit that they have already had the opportunity to work in this country. Other respondents who had the opportunity to work outside of their country admitted that the most common

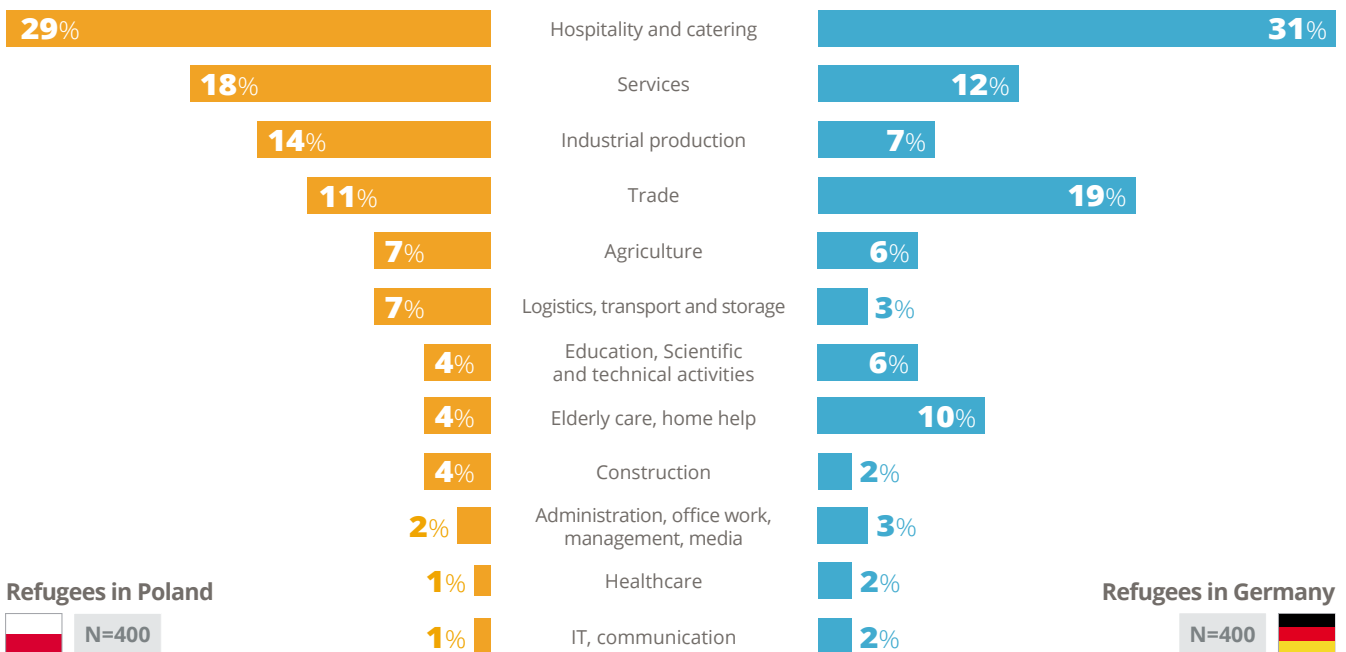
destinations were Slovakia (14%), the Czech Republic (8%), Germany (6%), Romania (6%) and Hungary (6%).

Refugees from Ukraine in Germany who confirmed their experience of working abroad indicated that before the outbreak of the war they most often took up employment in Germany (31%), as well as in Poland (29%) or the Czech Republic (6%). 8% of respondents gained work experience in Italy, and just as often in the Netherlands (8%).

How did you find your current employment in the country you are now staying in?



Sector of employment in the country of current residence



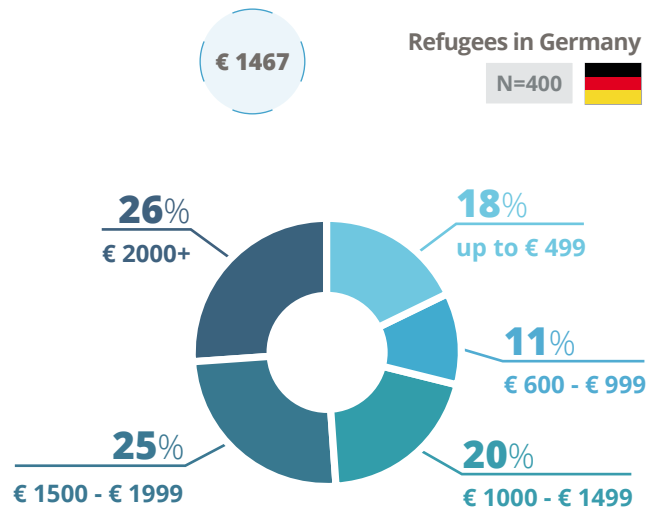
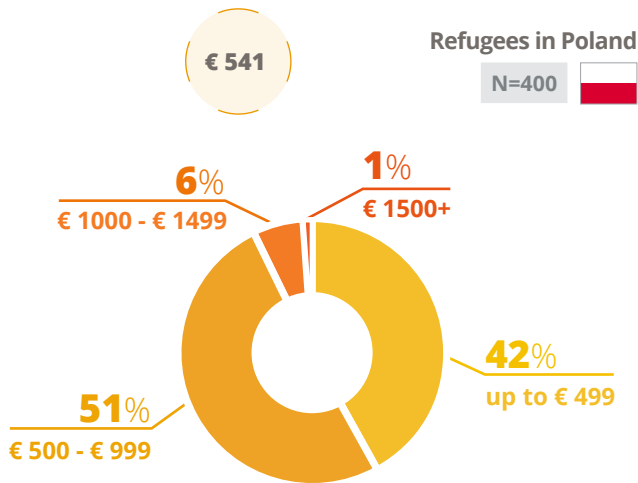
Almost one in four respondents in Poland (24%) and Germany (25%) **found work through recommendations from friends or family**. Equally often employment was found through the help of local authorities and on their own.

After arriving in Poland, **refugees from Ukraine most often took up employment in the hotel and catering sector** (29%), services (18%), production (14%), trade (11%), as well as in agriculture (7%) and logistics (7%).

Refugees from Ukraine who arrived in Germany were also most likely to find employment in the hospitality sector (31%). In second place was the trade sector (19%) and in third was the services sector (12%). Nearly 10% chose to work in elderly care and home help, in which the demand for employees is consistently high. In addition, 7% of respondents started work in industrial production, and 6% in both, education and agriculture.

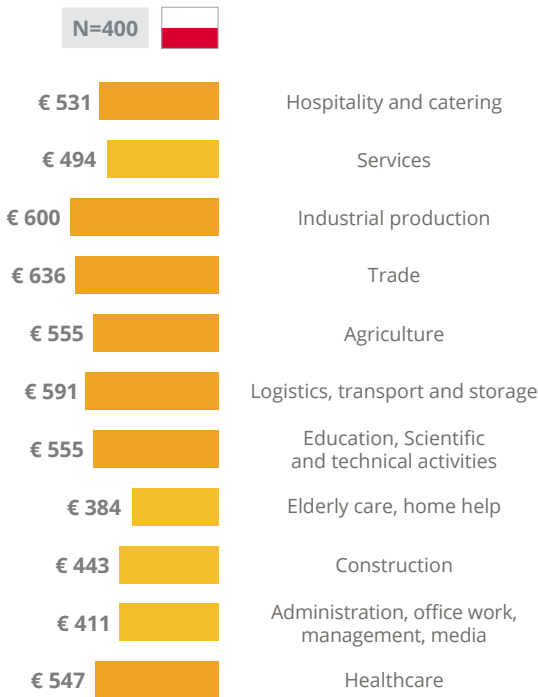
EMPLOYMENT

Average monthly earnings (net)

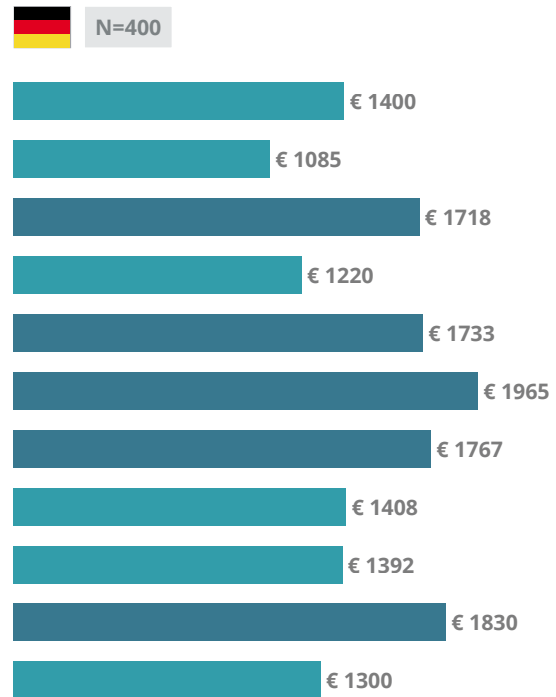


Average monthly earnings (net) by sector

Refugees in Poland



Refugees in Germany



It can be concluded that average monthly earnings in Germany are almost three times higher than in Poland. **Refugees working in Poland earn on average €541 net per month, and in Germany €1,467.**

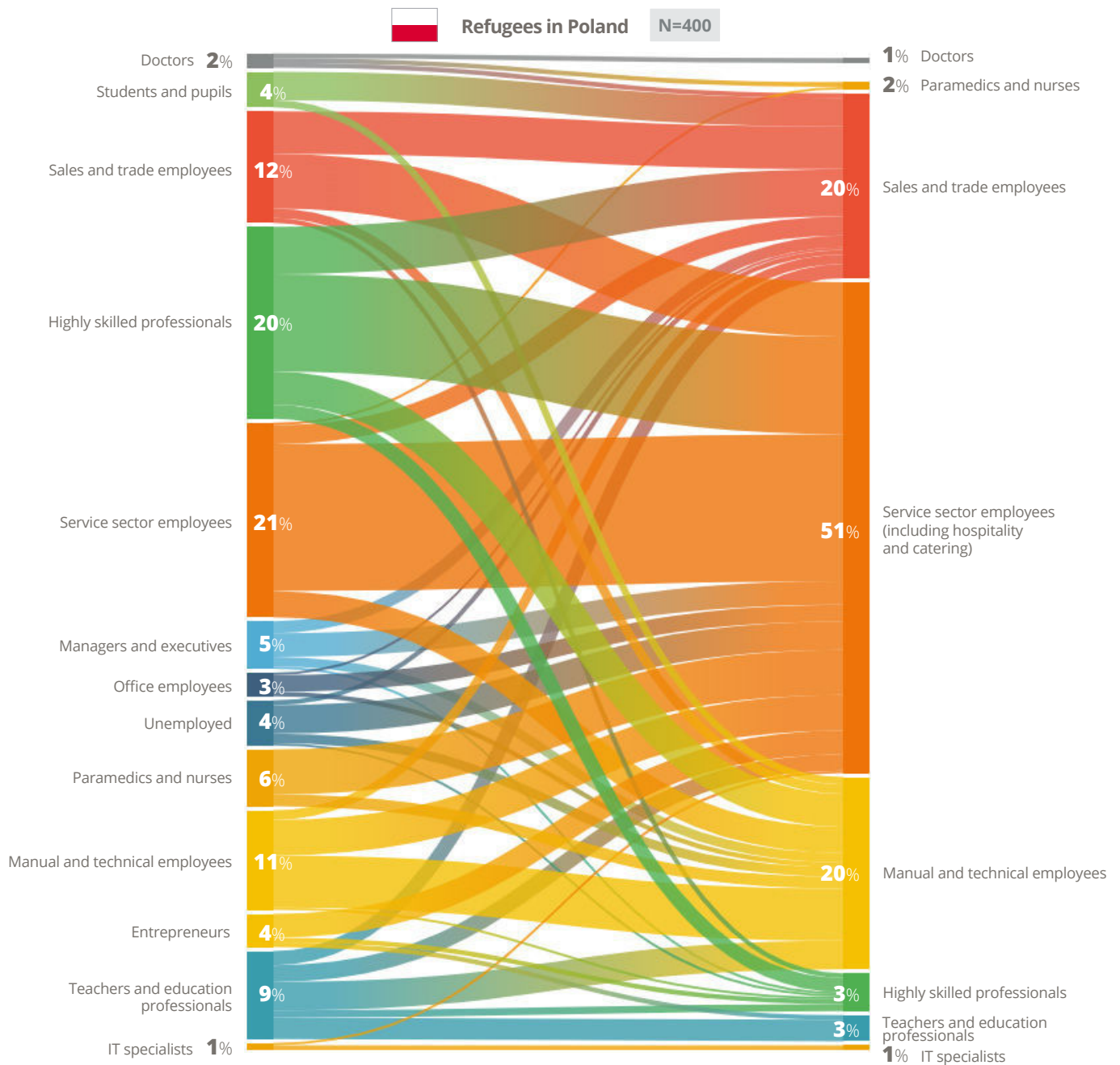
More than 1/4 (26%) of those surveyed in Germany admitted that they earn more than €2,000. Nearly half of the refugees in Germany (45%) declare earnings between €1,000 and €1,999, compared to only 7% in Poland.

Nearly half of Ukrainian refugees in Poland (51%) are paid between €500 and €999 net. In contrast, 42% of respondents admit that they earn less than €500 net per month.

The biggest difference in earnings between Poland and Germany concerns administrative and office work, the logistics and transport industry, agriculture and education. On the other hand, the smallest wage disparity is visible in the trade and services sector.

What profession did you have in Ukraine?

What profession do you have in Poland?



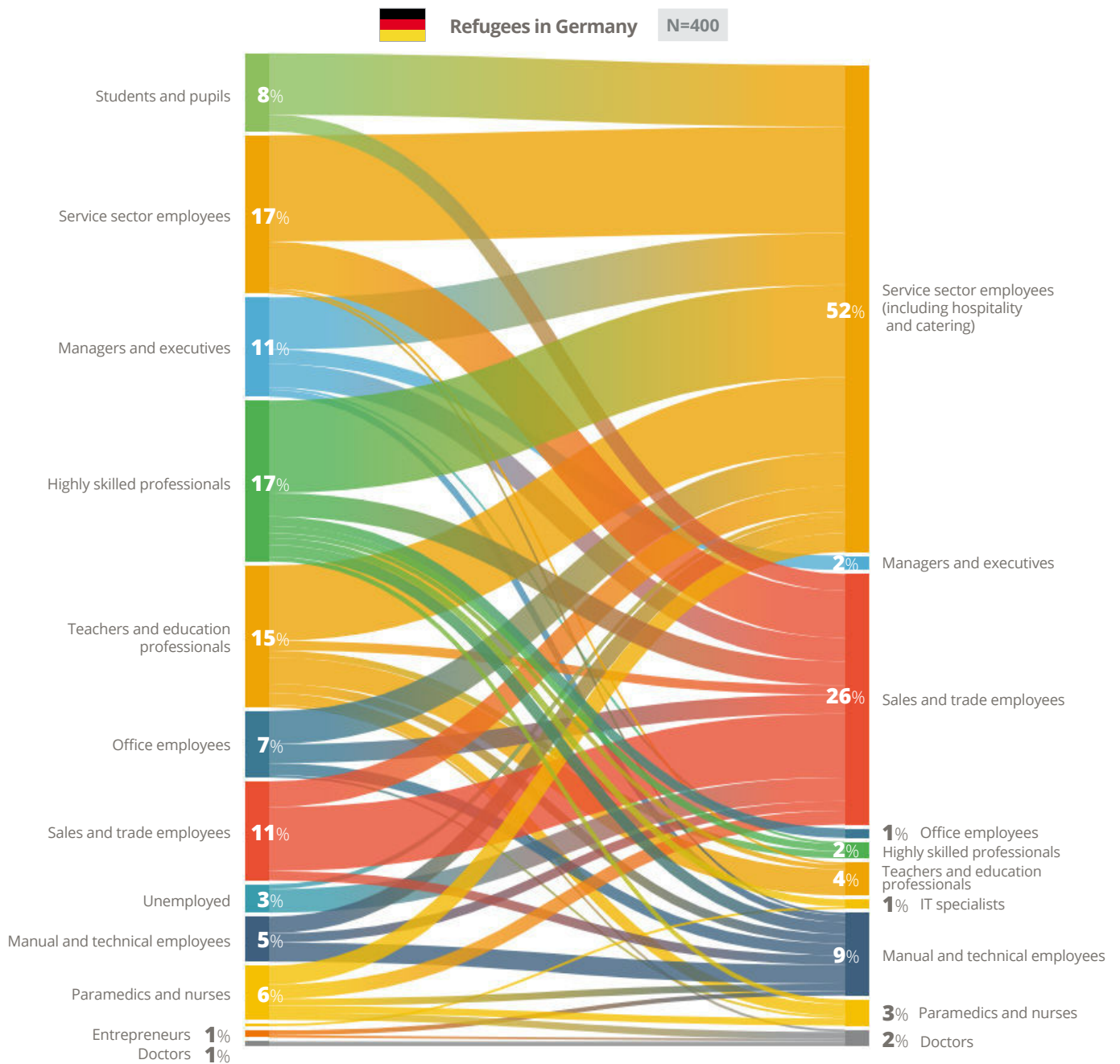
The study shows that **refugees from Ukraine working in the services sector have mostly remained in their profession** also on the Polish labour market. Some of them headed to the sales and trade sector, as well as to doing manual work. In the case of blue-collar workers, the majority also remained in their occupation, with around a third of them moving to the services sector. Paramedics and nurses who arrived in Poland after 24 February 2022

did not continue work in their profession, but started working in the services sector.

It is noteworthy that 1/4 of the education sector employees are working in their profession in Poland, although most of them retrained to work in the services sector, trade and manual jobs. The unemployed have taken up employment mainly in the services sector, the same as half of the highly skilled professionals.

What profession did you have in Ukraine?

What profession do you have in Germany?



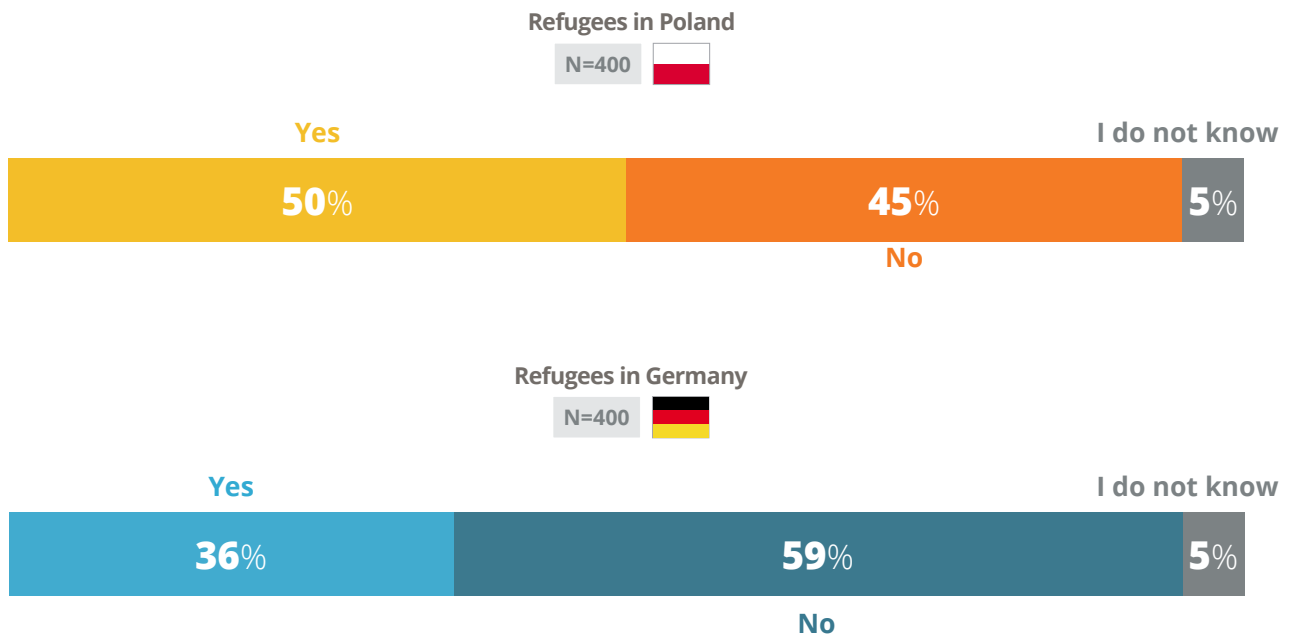
The German services and trade sector has brought together representatives of most professions, including managers and executives, highly skilled professionals, teachers and education professionals, office employees and manual workers. The growth in demand for services, and thus for workers in this sector, may result from the economic recovery in

Germany after the COVID-19 pandemic. It is worth pointing out that students and pupils have taken up employment mainly in the services sector, while the unemployed started work in the sales and trade sector. **Ukrainians working in the services and trade sector** have mostly remained in their profession also on the German labour market.

Have you undergone (or are you undergoing) vocational qualification courses or training in the country of your current residence?



Did your current employer help you find accommodation in the country of your current residence?



About 1/5 of respondents in both countries admit that they **are upgrading their professional qualifications through courses and training**. Nearly 40% of respondents in Poland and Germany declare their intention to increase the level of their skills in the future, which demonstrates a high professional potential of the refugees, expressing their willingness to take advantage of various forms of professional development.

Half of the refugees from Ukraine residing in Poland declare that they **received assistance from the employer in finding accommodation**. In Germany, 36% of Ukrainian citizens received such assistance. This is due to the difference in standards of employment of foreigners in Poland and Germany. The provision of free accommodation, as well as travel for foreigners working in Poland is in the interest of the employer and often constitutes their obligation.



12,32 million

Ukrainian citizens left their country after 24 February 2022

UNHCR data as of 6 September 2022



5,57 million

Ukrainian citizens have already returned to their country

UNHCR data as of 6 September 2022

Poland



Germany



5,95 million

refugees from Ukraine have arrived in Poland

UNHCR data as of 6 September 2022



1 million

refugees from Ukraine have arrived in Germany

UNHCR data as of 6 September 2022



1,36 million

refugees from Ukraine have received temporary protection in Poland

UNHCR data as of 6 September 2022



655 thousand

refugees from Ukraine have received temporary protection in Germany

UNHCR data as of 6 September 2022



430,000

refugees from Ukraine have been employed in Poland

Ministry of Social Policy data as of 1 September 2022



approx. 160,000

refugees from Ukraine have been employed in Germany

Data from the ifo Institute for Economic Research



2,6 %

unemployment rate in Poland

Eurostat data as of 1 September



2,9 %

unemployment rate in Germany

Eurostat data as of 1 September



158,700

vacancies in Poland

CSO data. Status at the end of Q1 2022



881,000

vacancies in Germany

Federal Statistical Office data as of 1 September



MICHALINA SIELEWICZ

International Development
Director at the EWL Group

RESPONDENT PROFILE

The majority of Ukrainian refugees working in Poland (94%) and Germany (95%) are women. This fact is not insignificant for the employers who face the challenge of enabling access to employment to willing female refugees and creating the right conditions for them. It will constitute a positive change for the labour market in Poland, which will be felt by all women wishing to take up work.

Almost 40% of the working refugees from Ukraine residing in Poland and Germany are refugees in the 36-45 age bracket. This demonstrates a high share of people of the working age, which is of great importance for the European labour market.

Among refugees working in Germany, a significant group, about 16%, are young people aged 18-25, while in Poland it is only 10%. The arrival of many of them is determined by their high capacity for cross-border mobility and the desire to take up well-paid work.

More adult Ukrainians arrived in Poland with children (71%) than in Germany (55%). This is probably due to a desire to shorten the travel distance with children in connection with refugee migration of short-term nature for the time of the war.

The vast majority of working respondents, as many as 77% in each of the countries surveyed, declare that they have been vaccinated against COVID-19. Compared to the 2021 study (Report on Cross-border Mobility), this percentage has almost doubled, as it was 42% in December 2021. However, it is worth emphasizing that the current study involved only working refugees.

MOTIVATIONS FOR CHOICE AND CONCERNS

The main factors determining the decision about the arrival of refugees from Ukraine in Poland was the perception of Poland as the largest neighbouring country to the west (29%) and the feeling of cultural and linguistic proximity (26%). In contrast, in the context of choosing Germany, Ukrainian refugees often point to economic factors, namely a high level of economic development of this country in the EU (27%) and the possibility of employment (22%). Of great importance for the refugees was the membership of both Poland and Germany in NATO (24% and 25%), indicating the significance of safety and opportunities for development.

Almost half (48%) of the refugees working in both countries intend to stay there for longer, at least for one year after the end of the war. The situation was different in the previous report 'Refugees from Ukraine in Poland, the Czech Republic and Romania', which included all refugees, not only the working ones. Then, the intention to stay in Poland for at least a year was declared by one in three respondents.

The main concern accompanying more than half of the Ukrainians staying and working in Poland (51%), as well as in Germany (57%) is the concern about their relatives remaining in Ukraine. In the case of respondents from Germany it is also the poor knowledge of German (46%). Ukrainian citizens in Germany, however, are less concerned about their means of subsistence (21%), compared to those residing in Poland (28%). Almost 1/4 of respondents (23%) in Poland declare that they are worried about difficulties in finding a place to live, while in Germany such fear concerns only 7% of respondents.

EDUCATION AND LANGUAGE SKILLS

Despite the lack of direct border proximity, Germany has become a destination country for a significant group of refugees from Ukraine due to the opportunities for work and development, which represent another important priority after meeting the basic needs of finding a safe haven during the war.

The respondents residing in Poland and Germany are mostly people with higher and incomplete higher education. The percentage of people with university education in Germany (60%) is higher than in Poland (46%).

More than half of refugees in Poland (53%) and Germany (55%) do not speak the language of the destination country or know it very poorly. This fact remains particularly relevant from the perspective of vocational activation of refugees from Ukraine, which requires the introduction of free language courses. However, the situation is different in the case of knowledge of English as every second respondent in Germany (53%) declares at least a communicative level of English, with only 33% of respondents in Poland. However, it is worth emphasising that more than half of the respondents in both countries are learning the language of the host country.

Special attention should be paid to the fact that among the refugees residing in Poland there is a noticeably high percentage of people speaking Ukrainian in their workplace (68%). Such a high rate results from the long-standing tradition of employing Ukrainian citizens in Poland and the opportunities for their professional development. The key role in this respect is played by Ukrainian citizens in leadership positions, fluent in Polish, who ensure effective communication between the Polish employers and Ukrainian employees. This enables them to unleash their professional potential. In Germany, the percentage of Ukrainian refugees speaking Ukrainian in the workplace is more than four times lower (16%).

As a country with many years of experience and extensive know-how in terms of current standards of employing foreigners and providing them with accommodation, as well as employment of Ukrainian nationals in leadership positions, Poland is a paragon of best practices for other EU countries, in particular Germany.

EMPLOYMENT AND EARNINGS

Refugees from Ukraine who took up employment in Poland used to work as employees of the services sector (21%), trade (12%), highly skilled professionals (20%), manual workers and technicians (11%) before the outbreak of the war. After arriving in Poland, they most often took up employment in professions related to services, including hospitality and catering (51%), trade (20%), manual jobs and technical professions (20%).

Ukrainian refugees who arrived in Germany and took up employment there used to work in the services sector (17%), education (15%), as highly skilled professionals (17%) and at managerial positions (11%) prior to the outbreak of war. After arriving in Germany, they were employed in service-related occupations, including hospitality and catering (52%), trade (26%) and as manual workers and technicians (9%).

It is worth noting that those working in the Ukrainian services sector mostly remained in their profession in the Polish and German labour markets. A significant proportion of them headed to the sales and trade sector. In the case of manual workers, the majority remained in their profession and about a third of them moved to the services sector. Paramedics and nurses who arrived in Poland after 24 February 2022 did not continue working in their professions, but went to the services sector, manual labour and technical professions. Ukrainian students and pupils residing in Germany took up employment mainly in the service sector.

The study showed that the average monthly net earnings of Ukrainian refugees in Germany are almost three times as high as in Poland. Refugees working in Poland declare that they earn on average €541 net per month, in Germany it is €1,467.

About 1/5 of respondents in both countries admit that they are upgrading their professional qualifications through courses and trainings. Nearly 40% of respondents in Poland and Germany declare their intention to increase their skills, which may result from the intention of taking up a stable job, pursuing professional development and staying in the host country for the long term.

METHODOLOGY

The study of refugees from Ukraine residing in Poland and Germany was carried out by means of direct individual interviews using smartphones and tablets (CAPI F2F). The interviews were conducted in Ukrainian with Ukrainian citizens who left Ukraine and arrived in Poland and Germany after 24 February 2022.

The study in Poland and Germany was carried out between 15 July and 25 July 2022 on a sample of n=400 adult (18+) refugees from Ukraine, all residing and working at the time in Poland and Germany respectively.

The respondents in Poland were interviewed in different regions of the country including Warsaw, Wrocław, Krakow, Rzeszów, Lublin and Wadowice. Refugees from Ukraine residing in Germany were interviewed among others in Berlin, Dortmund, Dresden, Frankfurt am Main, Munich and Pasava.

The survey was random, which ensured its representative character. The cross-sectional character of the respondents is confirmed by the fact that they included residents of all regions of Ukraine, representatives of different age groups, professions and education levels.





EWL MIGRATION PLATFORM

Founded in 2007, the EWL Group successfully connects jobseekers from four continents with employers in the EU. As a migration platform, whose activities go far beyond the scope of traditional employment agencies and combine the offline and online worlds, the company is the leader on the Polish market of employment of foreigners.

The platform's wide range of services includes the management of the entire migration process: from recruitment, through legalization, provision of accommodation, employee leasing or provision of services in form of outsourcing. Thanks to many years of experience the EWL team of experts has excellent knowledge of local and European labour markets.

Every day, thanks to the EWL Group, more than 13,000 people are employed in production plants, logistics centres and warehouses in Europe. In its history, the company has helped more than 120,000 people to relocate and find employment.

The development of the migration platform has been supported since 2021 by the National Centre for Research and Development. Since 2018 EWL S.A. has been conducting sociological studies among foreigners who have taken employment in Poland.

The company is guided by the values of: openness, cooperation and responsibility, being fair, challenging the status quo and market obsession, and the company's vision is changing the global migration market.

FOUNDATION FOR THE SUPPORT OF MIGRANTS ON THE LABOUR MARKET 'EWL'

Founded in 2015, the Foundation for the Support of Migrants on the Labour Market 'EWL' aims to initiate and support activities related to the presence of foreigners on the Polish labour market.

Our idea is to raise awareness of rights and obligations and the benefits of legal employment among foreigners, as well as to limit the abuse by dishonest employers. One of the main objectives of the Foundation is to improve multilateral cooperation between employers, government institutions, non-governmental organizations and migrants themselves.

The Foundation also does charity work addressed mainly to foreigners who are in a difficult life or financial situation. In addition, it works for European integration, active dialogue and the development of contacts and cooperation between societies. The Foundation's activities are directed, among others, to entities involved in migration processes and participants of the global labour market.



THE CENTRE FOR EAST EUROPEAN STUDIES AT THE UNIVERSITY OF WARSAW

The Centre for East European Studies is a unique academic unit in Poland, continuing the traditions of pre-war Sovietological centres – the East European Institute in Vilnius (1930–1939) and the Eastern Institute in Warsaw (1926–1939). The teaching offer of the Centre includes elite Eastern Studies (1st and 2nd degree and postgraduate courses) as well as schools for foreign students. The lecturers are eminent scientists, diplomats and specialists from Europe and the USA.

The Centre annually organizes international scientific conferences and a series of events building positive relations between Poland and the countries of the



former USSR. It is also the publisher of numerous books and magazines devoted to the eastern themes.

In the years 2004–2013, the Centre for East European Studies, under the content-related supervision of Mariusz Kowalski and the general management of Jan Malicki, conducted a series of social studies in Ukraine. The first of them took place in December 2004. A total of about 2,000 questionnaire interviews was carried out, pertaining issues such as political views and preferred directions of international cooperation, with particular emphasis on the place of origin, nationality and language of the respondents' daily communication.

EWL MIGRATION PLATFORM REPORTS 2018-2022



„SPECIAL REPORT
UKRAINIAN REFUGEES
in Poland, the Czech Republic
and Romania”

2022



„SPECIAL REPORT
UKRAINIAN REFUGEES
in Poland”

2022



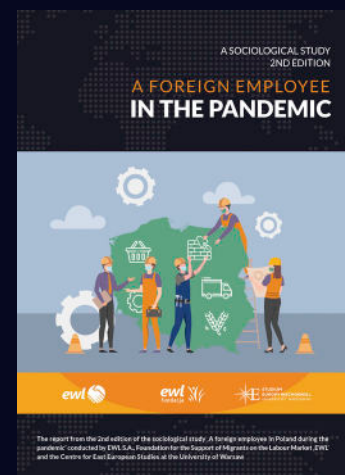
„REPORT ON CROSS-
BORDER MOBILITY
Citizens of Ukraine on the Polish
labour market. 3rd edition”

2022



„A FOREIGN EMPLOYEE
in the pandemic.
3rd edition”

2021



„A FOREIGN EMPLOYEE
in the pandemic.
2nd edition”

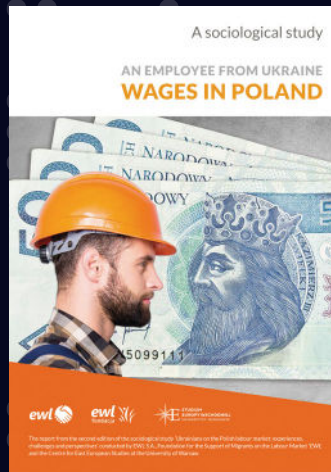
2020

EWL MIGRATION PLATFORM REPORTS 2018-2022



„A FOREIGN EMPLOYEE
in the pandemic”

2020



„AN EMPLOYEE
FROM UKRAINE
wages in Poland”

2019



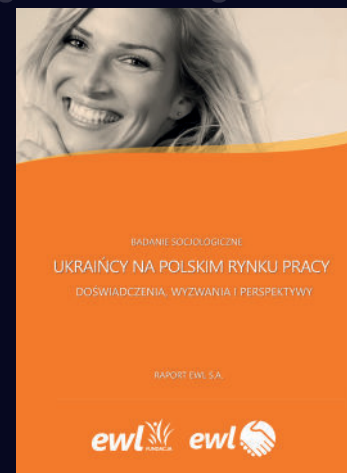
„UKRAINIANS ON THE
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2019



„AN EMPLOYEE
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2018



**„UKRAINIAN REFUGEES – VOCATIONAL ACTIVATION IN GERMANY AND IN POLAND”.
A STUDY BY THE EWL**

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AUTHORS:

Anatoliy Zymnin, Mariusz Kowalski
PhD (social geographer, content-
related supervision), Michalina Sielewicz,
Karolina Klages, Sylwia Kowcuń, Szymon
Bryzek, Olena Lytvynenko, Sergiusz
Brusnyk, Eliza Dąbrowska, Dorota
Koszykowska, Filip Stelmach

CONTACT:

Anatoliy Zymnin
Spokesperson
+48 535 888 815
anatol.zymnin@ewl.com.pl

CONTACT:

Michalina Sielewicz
International Development
Director
+48 517 571 953
michalina.sielewicz@ewl.com.pl