

REPORT ON CROSS-BORDER MOBILITY

CITIZENS OF UKRAINE ON THE POLISH LABOUR MARKET
NEW CHALLENGES AND PERSPECTIVES



The report from the 4th edition of the sociological study 'Citizens of Ukraine on the Polish Labour Market. New challenges and perspectives' 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
CEO of the EWL Foundation

Economic migration from Ukraine has been affecting the functioning of the Polish economy for many years. Until the outbreak of the war the Polish labour market was supported by nearly 1.5 million Ukrainians, who supplemented staff shortages and contributed to the development of enterprises. According to the National Bank of Poland the contribution of immigration from Ukraine to Poland's GDP growth between 2014-2018 amounted to 11%. The number of Ukrainian labour migrants has grown significantly over the past decade and their work matched their qualifications and experience more and more, positively contributing to the uninterrupted professional development of this group.

The influx of war refugees from Ukraine after 24 February 2022 has undoubtedly dominated the migration situation in our country, thus changing the profile of the Ukrainian migrant living in Poland. Currently, the majority of Ukrainian citizens staying in Poland are women with children, who often work below their qualifications. Poorer knowledge of Polish and difficulties with adjusting to new living and working conditions are a challenge not only for many refugee migrants in Poland, but also for Polish employers.

Nevertheless, Poland has been very successful in providing jobs to refugees from Ukraine, the vast majority of whom found their first jobs in our country. Thanks to training programmes and support from Polish employers, the migrants have the possibility to learn Polish and acquire new qualifications, which will allow them to work in their professions, as well as to strengthen the labour market through taking up employment in sectors of key importance for the Polish economy.

Once the war is over, some of the refugees will decide to return to Ukraine, where they will be able to implement the new practices they gained in Poland, which will certainly contribute to the reconstruction of their country. It ought to be mentioned that this process is already underway. Our study has shown that more than half of Ukrainian citizens staying in Poland declare that they support their homeland by regularly donating money. This is one of those examples where the labour market activation of Ukrainian citizens in Poland significantly contributes to the invaluable support of fellow citizens who remain in Ukraine in the face of Russian aggression.

I invite you to read the report.



JAN MALICKI, DR H.C.

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

For many months we have witnessed a brutal and unjust war that forced millions of Ukrainian citizens to leave their homes and seek refuge outside their country. In the face of these circumstances and the challenges we were faced with on 24 February 2022, the focus of our research efforts today are primarily Ukrainian war refugees, whose arrival has triggered many changes in the context of the formation of the Ukrainian community in Poland.

As a result of the Russian invasion, our country received mainly women with children, tired and weary from the long journey. Thanks to the unbelievable commitment of millions of Polish citizens, the support of the government, local authorities, independent organisations and volunteers, war migrants have found not only a roof over their heads, but also the possibility of stable work and a substitute for a normal life. Our society has opened its heart to our Ukrainian brothers and sisters, thus bearing a moving and uplifting witness to a human, solidarity-based, Christian attitude, in the most beautiful sense of these terms.

Today, as we summarise in this report the last year of the transition from the perspective of the domestic labour market, we can observe how much the portrait of a Ukrainian national living in Poland has changed.

This research is a valuable tool to verify whether the perceptions of their stay in our country have come true and to know their intentions regarding living and working the moment the war comes to an end.

Our latest study, conducted in cooperation with the experts from the EWL Migration Platform, showed that some Ukrainian migrants want to stay in Poland for a longer period in order to become part of our society. By supporting both, the Polish and Ukrainian economies, they will also enrich our culture and will further bond our peoples in this symbolic 'wartime and post-war' community.

Enjoy your read.

67%

of Ukrainian citizens staying in Poland are women

50%

of Ukrainian citizens are staying in Poland with children

4%

of adult Ukrainian citizens in Poland are in post-working age

62%

of respondents intend to return to Ukraine in the near or long term

50%

of respondents plan to apply for a temporary or permanent residence permit in Poland

45%

of respondents declare they use Polish state healthcare

56%

of Ukrainian citizens in Poland have university or incomplete higher education

35%

of respondents declare good or very good knowledge of Polish

70%

of respondents declare their children benefit of the Polish education system

78%

of Ukrainian citizen have taken up paid work

24%

of respondents were looking for employment in countries other than Poland within the last year

55%

of Ukrainian citizens working in Poland would recommend work in this country to their friends and relatives

54%

of Ukrainian citizens in Poland send money to Ukraine

~771 złotych

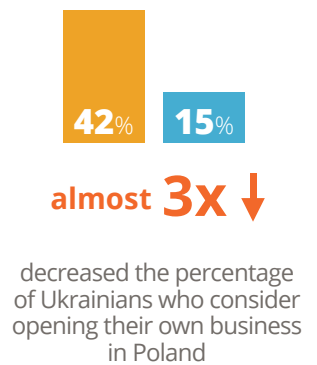
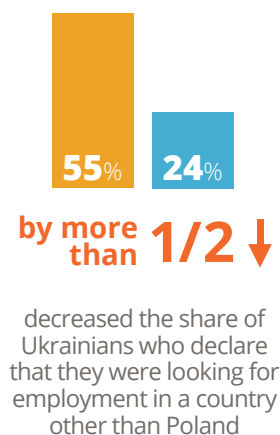
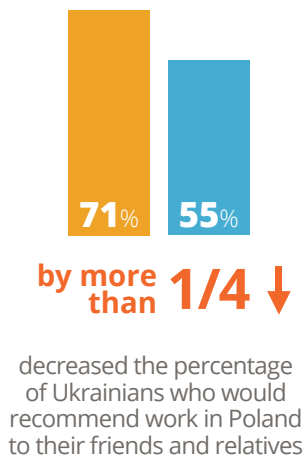
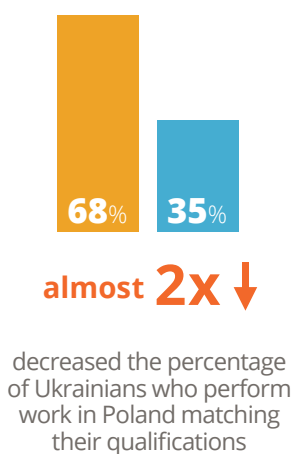
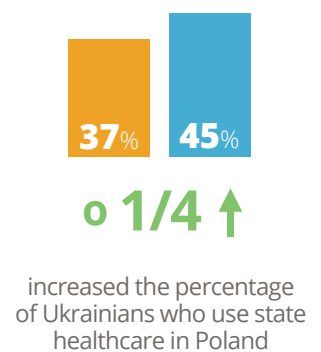
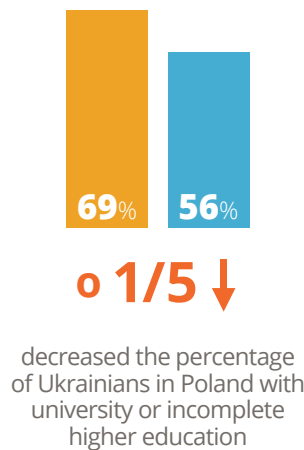
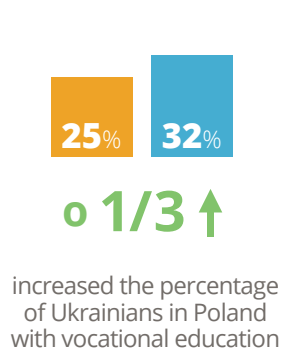
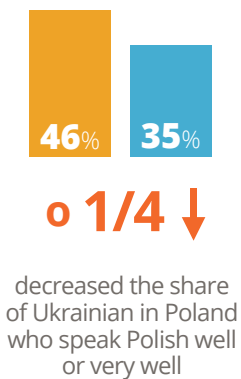
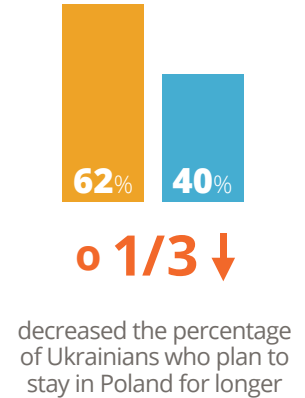
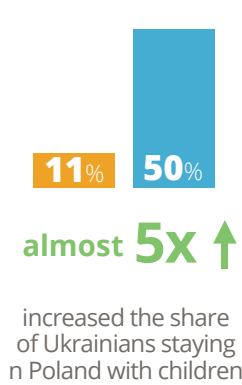
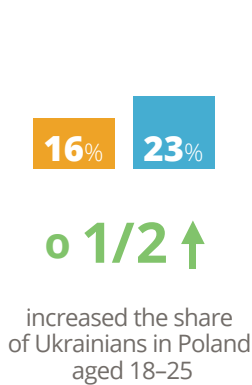
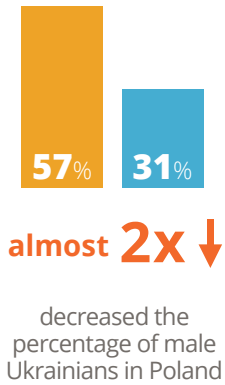
per month on average is sent to their homeland by Ukrainian citizens in Poland

48%

of respondents believe that facilitating access to language courses fosters the integration of Ukrainian citizens in Poland the most

KEY TRENDS 2021-2023

■ Ukrainian citizens in Poland 2021
■ Ukrainian citizens in Poland 2023



PROFILE OF THE UKRAINIAN CITIZEN IN POLAND

Almost two thirds of the respondents of the study were migrants who arrived in Poland before 24 February 2022 (60%), and more than a third were war refugees who arrived after the outbreak of the war in Ukraine (40%).

Two thirds of Ukrainian citizens in Poland are women (67%). The largest impact on such a characteristic of the population was the group of war refugees, within which women account for as much as 92%. Ukrainian citizens staying in Poland are young people. Almost half of this population (49%) are people under 36 years of age. **Among Ukrainian citizens in**

Poland, people of post-working age account for 4%.

More than half of Ukrainian citizens in Poland have university or incomplete higher education (56%), and one in three has vocational education (32%). **Every third Ukrainian citizen in Poland speaks Polish well or very well (35%).** The percentage of those who speak Polish well is significantly higher in the case of migrants (49%). Among war refugees a good or very good knowledge of Polish is declared by only 14%.

CHILDCARE AND ACCESS TO PUBLIC SERVICES

Half of Ukrainian citizens staying in Poland came to our country with children under the age of 18 (50%). This percentage is 66% for war refugees and 40% for pre-war migrants.

Every third Ukrainian citizen who came to Poland with children (39%) positively assesses the extent to which the provision of childcare enables parents to seek employment or further education.

Almost half of Ukrainian citizens in Poland use state healthcare facilities (45%), and one in four (25%) takes advantage of private medical care. In case of health problems every tenth respondent travels to Ukraine (10%), and one in four (27%) consults a doctor in Ukraine by phone.

STAY IN POLAND

Almost half of Ukrainian citizens in Poland living in cities with more than 50,000 inhabitants declare their readiness to move to smaller towns if they are provided with work and good conditions for their family life (43%).

40% of Ukrainian citizens staying in Poland intend to stay here for at least a year or several years. Among war refugees this percentage is 30% and among pre-war migrants – 47%.

Half of Ukrainian citizens in Poland declare their intention to apply for a residence permit in Poland (50%). 17% plan to apply for a permanent residence permit and 33% for a temporary residence permit. The intention to apply for a „permanent residence card” in Poland significantly differentiates the group of migrants (26%) from the group of refugees (4%).

Almost half (43%) of Ukrainian citizens in Poland are interested in applying for Polish citizenship. Among pre-war migrants the percentage of those interested in obtaining a Polish passport is 57%, while for the refugees it is only 22%.

More than half of Ukrainian citizens in Poland (53%) declare that before coming to the country they knew Poles were friendly towards Ukrainians. Almost half (44%) knew that Poland was an emigration country mainly for unskilled workers. More than 2/3 of the respondents declare that their previous beliefs regarding Poland were confirmed after arriving to the country.

EMPLOYMENT IN POLAND

More than 3/4 of Ukrainian citizens in Poland declare that they perform paid work (78%).

The percentage of the employed is higher among the migrants (83%) than the refugees (71%). High expectations of the employers (37%) and limited mobility (28%) are the biggest problems faced by Ukrainian citizens in Poland when looking for a job.

Finding a job on their own (31%) and working on recommendations of family or friends (31%) are the two most frequently indicated ways of finding a job in Poland by Ukrainian citizens.

Every third Ukrainian citizen working in Poland performs work corresponding to their qualifications (35%). Half of the war refugees

INTEGRATION IN POLAND

Every sixth Ukrainian citizen in Poland (17%) is considering opening a business in our country (or has already done so). Every third respondent considering opening a business in Poland plans to operate in the services sector (33%). Also popular are such industries as construction (15%), trade (15%) or IT (13%).

Broad access to social benefits (50%), facilitating access to language courses (48%) and education (47%) are the three most important elements that foster the integration of Ukrainians in Poland according to the

SUPPORT FOR UKRAINE AND PROSPECTS FOR RETURN

Almost all Ukrainians currently staying in Poland (83%) declare their support for Ukraine.

Most often the support takes the form of money – more than half of the respondents (54%) declare donating money to the Armed Forces of Ukraine. At the same time, almost half (42%) declare sending money to family as a form of support for the fighting homeland.

More than half of Ukrainians in Poland declare that they send money to Ukraine (56%), and 6% receive money from Ukraine.

Among the respondents sending money to Ukraine

working in Poland (51%) declare that the work they have undertaken does not match their qualifications.

More than half of Ukrainian citizens working in Poland (55%) declare they would recommend working in our country. The percentage of those recommending a job in Poland is higher in the group of migrants (61%) than in the group of refugees (39%).

Only every fourth Ukrainian citizen staying in our country looked for employment in countries other than Poland within the last year (24%). Among the respondents who looked for work outside Poland the majority (64%) were interested in employment in Germany and one in four (23%) in Czechia.

citizens of Ukraine staying in Poland.

For every third respondent (35%) the most favourable factor for the integration of Ukrainians in Poland are activities aimed at activation onto the labour market and facilitating access to healthcare (36%).

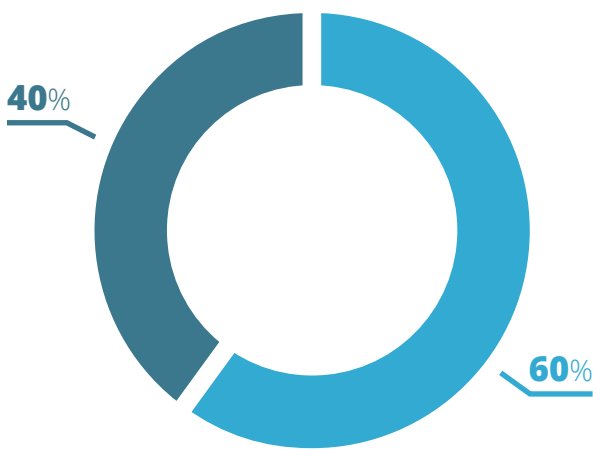
Telegram (78%), Facebook (73%) and Instagram (66%) are the three most frequently used channels for information and communication by Ukrainian citizens in Poland. Ukrainian citizens prefer TV (23%) over other traditional media.

half (50%) send monthly amounts of between PLN 301 and 1000.

Almost 2/3 of the citizens of Ukraine staying in Poland (62%) are planning to return to their homeland in the near or long term. One in four declares the desire to return to Ukraine without waiting for the Russian invasion to end (24%).

Among the factors motivating Ukrainian citizens to return to their country are: Ukraine's entry into the EU (57%) and NATO (47%), increased wages (54%) and the possibility to reunite with family who stayed in Ukraine (48%).

Status



■ Pre-war migrants 2023

■ War refugees 2023

The division of the sample into two groups (60% – pre-war migrants who arrived in Poland before 24 February 2022, 40% – war refugees who arrived in Poland after 24 February 2022) was based on the assumption that the number of adult pre-war migrants is approximately 1.5 million, and the number of adult war refugees is approximately 1 million people. The indicated figures appear in government information and numerous expert studies (e.g., the Polish Development Fund and the Centre of Migration Research at the University of Warsaw).

Gender

■ Women

■ Men



When analysing the profile of study participants in terms of demographic data, it should be noted that the Ukrainians currently staying in Poland are dominated by women (67%). Compared to the results of 2021, the gender structure of the respondents has changed noticeably. This has undoubtedly been influenced by the introduction of martial law in Ukraine and the associated ban on leaving the country by men between the ages of 18 and 60 (with some exceptions).

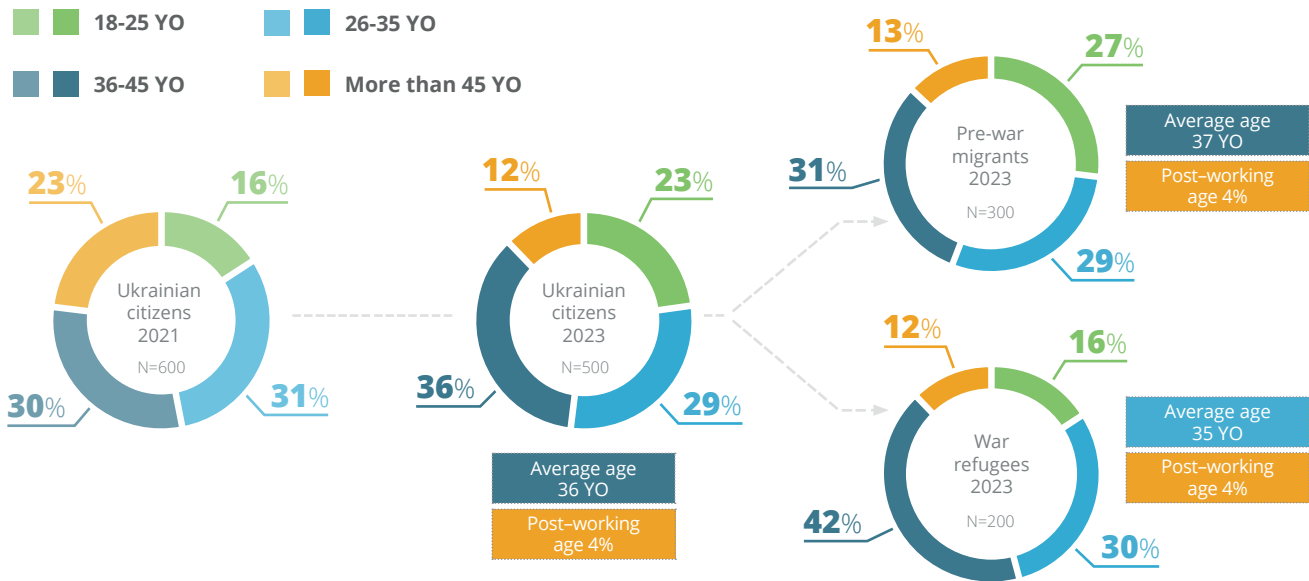
This fact was not without significance for key sectors

of the Polish economy, including construction, logistics and transport, manufacturing, in which men have so far constituted the core of the workforce.

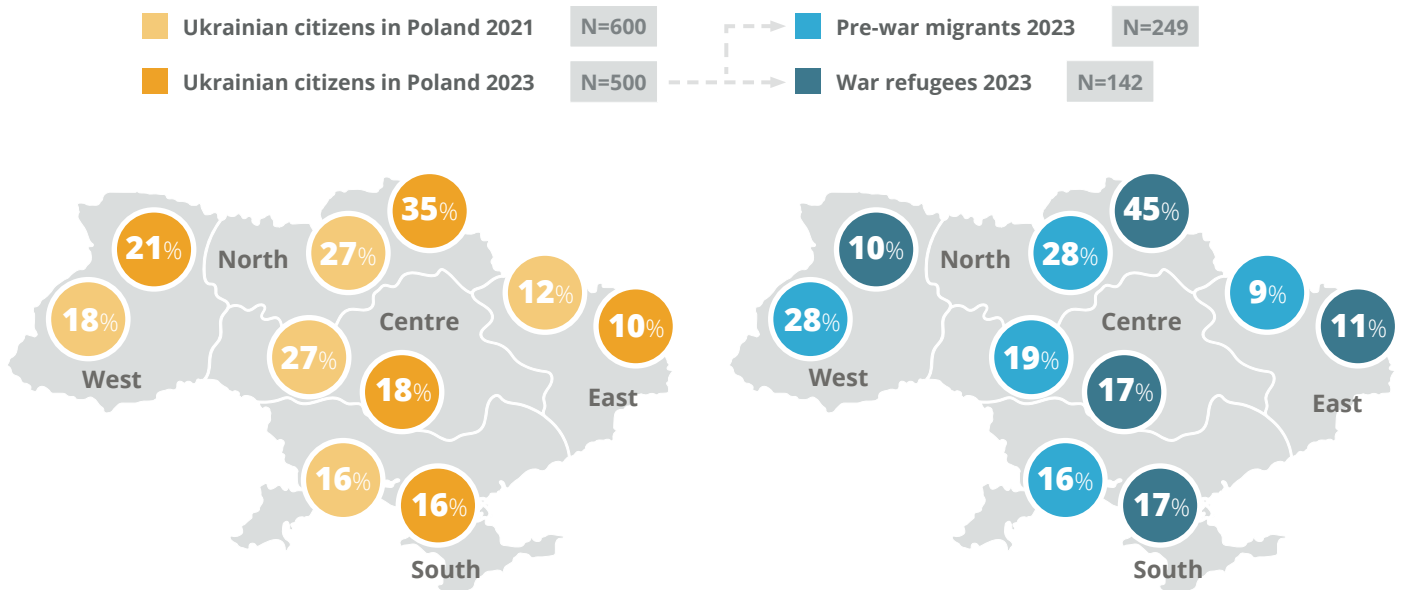
The deficit of male labour force and the new realities of the Polish labour market dictated by the war behind Poland's eastern border made it necessary for employers to take measures such as the adaptation of workplaces to the current occupational health and safety regulations suitable for women, as well as the implementation of training and support programmes for refugee women.

RESPONDENT PROFILE: AGE AND REGION OF RESIDENCE IN UKRAINE

Age



Region of residence in Ukraine



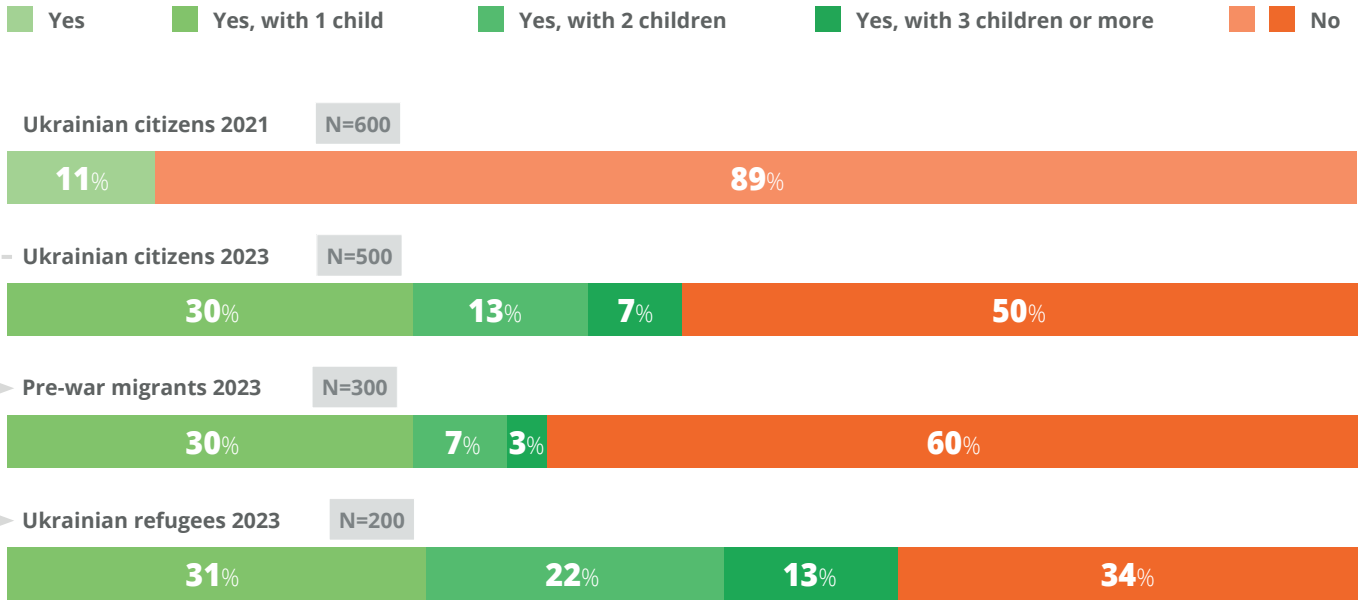
The data shows that over a period of 1.5 years also the age profile of adult Ukrainians staying in Poland has changed. The number of people aged 18-25 years old increased (23% vs. 16%), while the number of people over 45 years of age decreased (12% against 23%). These are particularly significant data in the context of the Polish economy, for which the inflow of young people – mobile and willing to take up employment – plays an important role. These changes may require appropriate reforms of the labour market policy, i.e., the adaptation of training

and activation programmes to the needs of different age groups. It should also be noted that only 4% of Ukrainian citizens in Poland are in the post-working age.

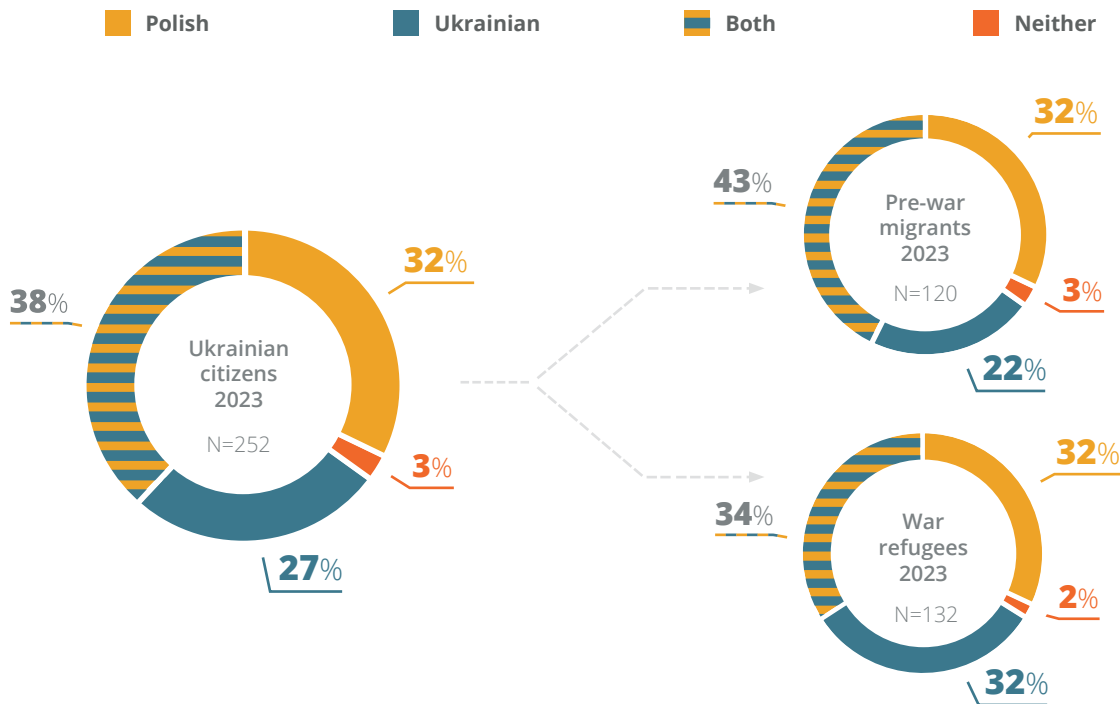
According to the results of the study, the largest number of Ukrainian citizens came to Poland from northern Ukraine, a region where the attack of the Russian occupiers was repelled, but left massive destruction. In comparison with 2021, the percentage of residents coming from these areas has increased by 9 percentage points (35% vs. 26%).

RESPONDENT PROFILE: CHILDREN

Did you come to Poland with children under 18 years of age?



Which education system do your children who are in Poland use? (among respondents who came with children)



In relation to 2021, there has been a fivefold increase in the percentage of Ukrainian citizens staying in Poland with children (50% against 11%).

Every third Ukrainian citizen in Poland declares that their children exclusively benefit from the Polish education system. In contrast, 38% of respondents admit that they use both systems, and only 27% of respondents take advantage only of the Ukrainian education system.

In the case of war refugees from Ukraine the division is very evenly split. The Ukrainian and Polish systems of education were indicated by 32% of respondents, and both by 34%. In the case of pre-war migrants only 22% of respondents declare that their children use the Ukrainian education system, one in three indicated the Polish system only, and 43% indicated both.

How do you assess the extent of providing childcare to enable parents to seek and take up employment or further training? (among respondents who came with children)

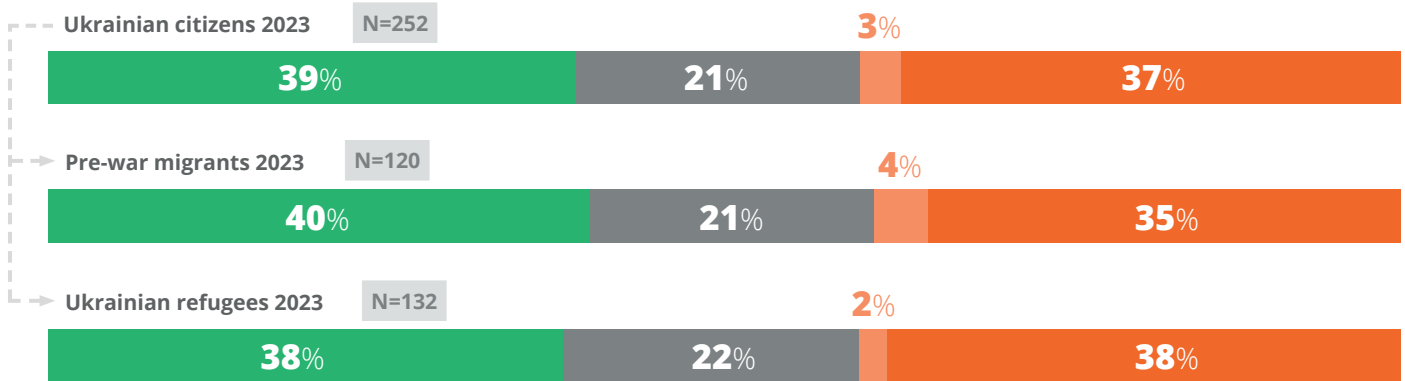
0% Definitely positive

Rather positive

Rather negative

Neither positive nor negative/I do not know/Difficult to say

Definitely negative

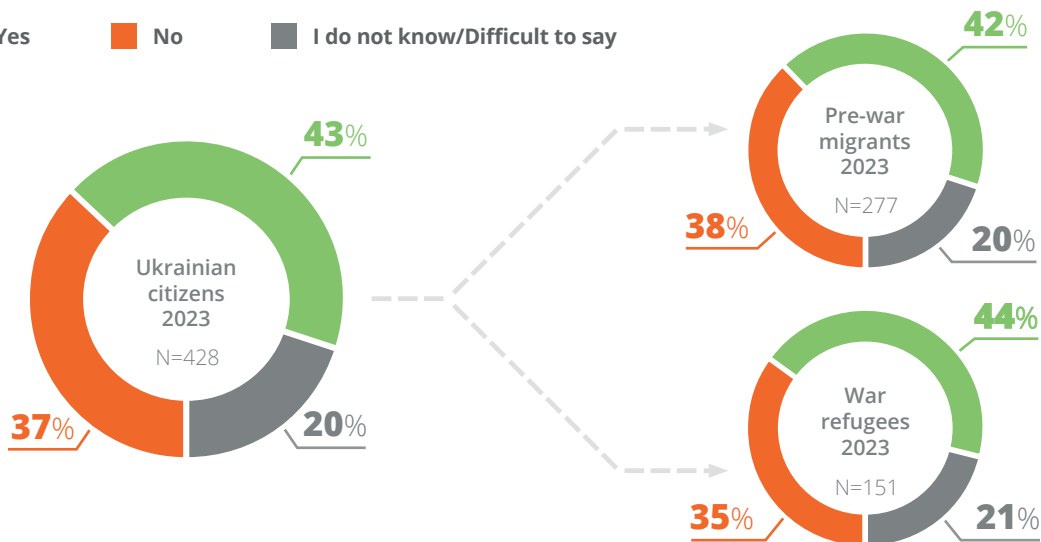


With an assured job and good conditions for family life, would you consider moving to smaller towns in Poland or to a rural area? (among respondents living in Poland in cities with more than 50,000 inhabitants)

Yes

No

I do not know/Difficult to say

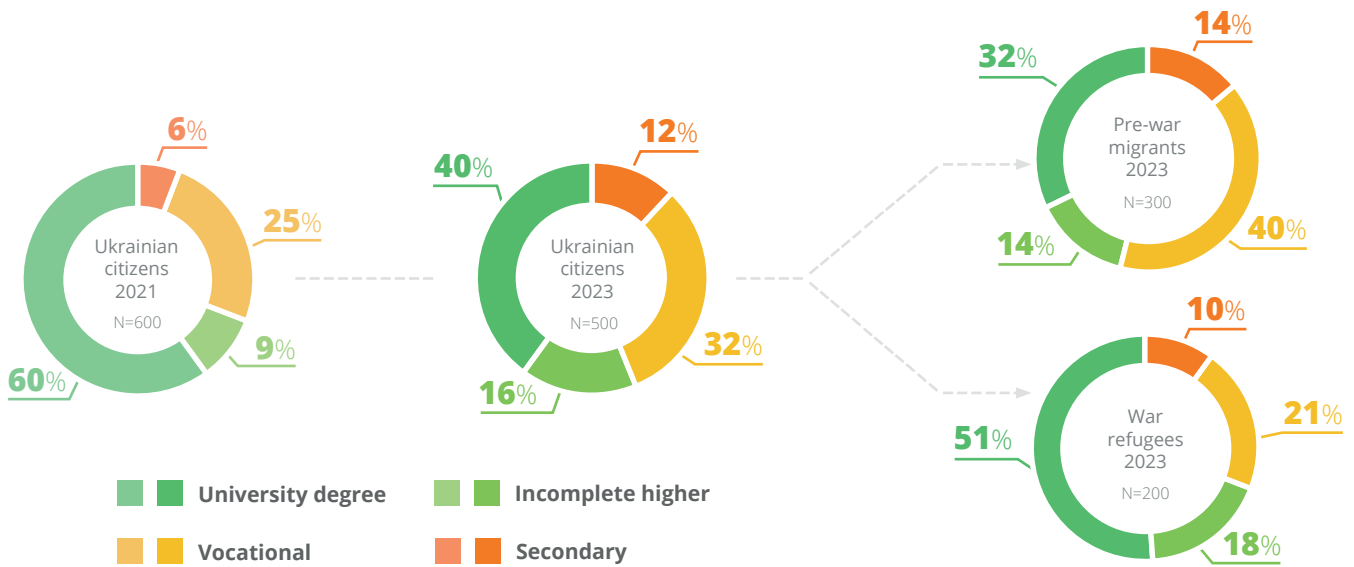


The provision of childcare to increase job opportunities and professional development by parents is rated more positively by pre-war migrants from Ukraine than war refugees from that country (40% vs. 38%). It is worth noting, however, that for each of the two groups the negative assessment of this area is equally high. This is a clear signal for action if the Polish economy cares about effective labour activation of women.

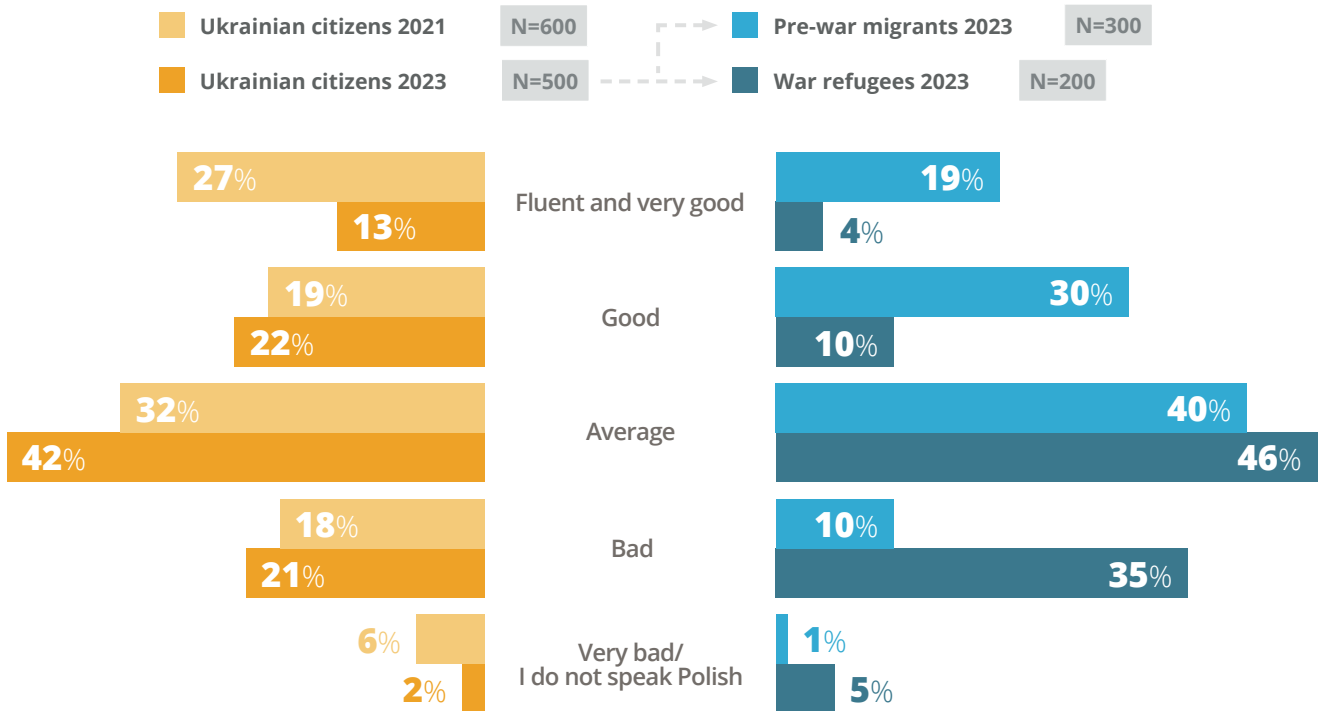
Ukrainian citizens (both pre-war migrants and refugees) are not attached to large agglomerations, where they are mostly living at present. They are ready to look for

opportunities for a better life also in smaller towns in Poland, if provided with work and adequate conditions for the whole family. Such is the opinion of 43% of respondents living in cities with more than 50,000 inhabitants. It should be added that in some agglomerations there is already a shortage of rental housing, and often there are not enough jobs either. In contrast, smaller towns are characterised by a greater range of offers of employment and housing, easier access to medical care, as well as schools and kindergartens.

Education



How would you rate your knowledge of Polish?



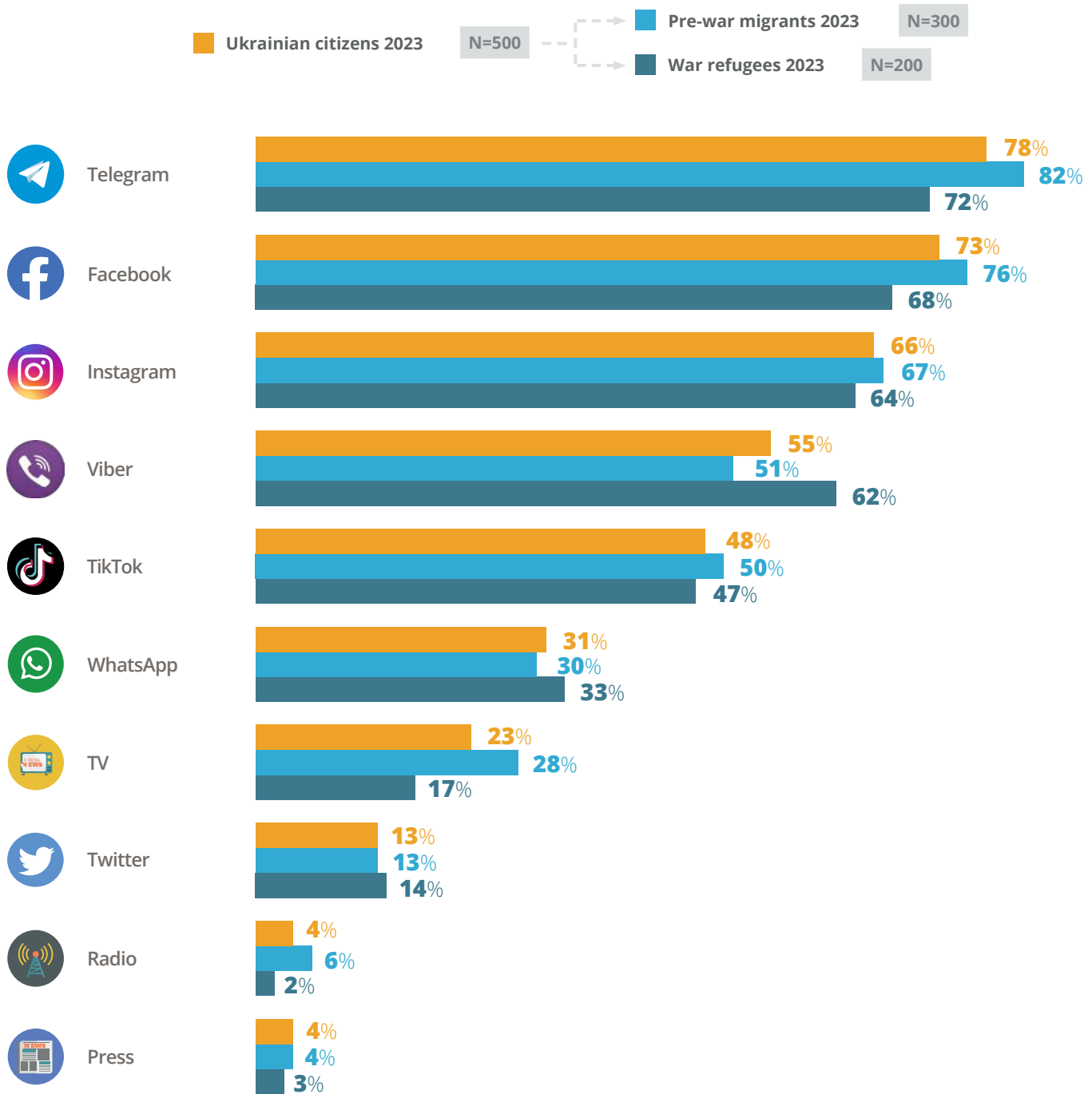
According to the study, a higher percentage of Ukrainian citizens with a university degree and incomplete higher education can be observed among refugees (69%) than pre-war migrants (46%). The reasons for this are, among others, the pre-war demand of the Polish economy for workers of specific professions with vocational education and a completely different type of migration determined by the war in Ukraine. It is worth noting that since December 2021, the share of Ukrainian citizens in Poland with a university degree and incomplete higher education

has decreased by 1/5, and with vocational education increased by 1/3.

The percentage of Ukrainian citizens who know Polish at a good and very good level decreased from 46% to 35%. The cause is primarily poor knowledge of Polish among war refugees (only 14% declare at least a good knowledge of Polish). On the other hand, good and very good level of Polish among pre-war migrants is still high (49%), and even higher compared to 2021.

CHANNELS OF INFORMATION AND COMMUNICATION

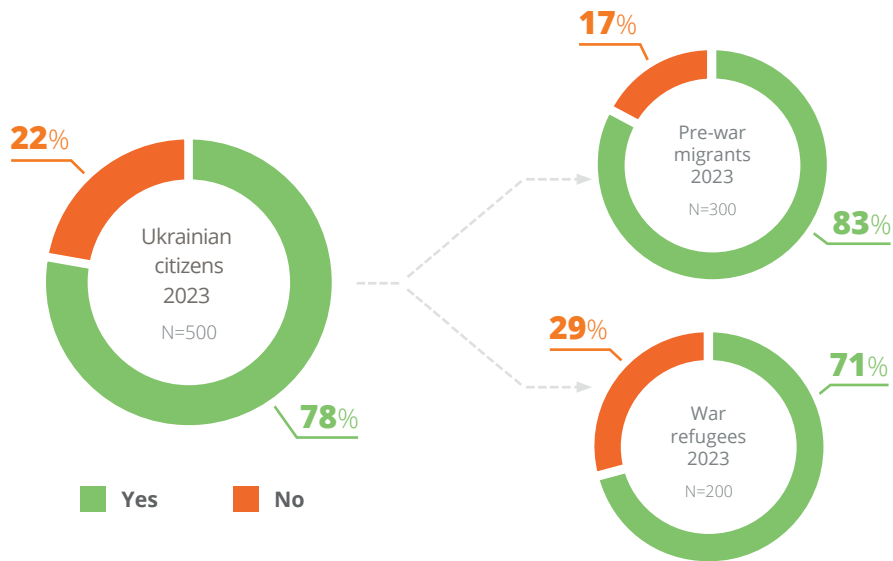
What information and communication channels do you use in Poland?
(multiple responses possible)



Popular communication apps and social media remain the main information channels for Ukrainians living in Poland, dominated by Telegram (78%), Facebook (73%) and Instagram (66%). This trend reflects the need for quick access to up-to-date information and indicates the target channels of communication with the citizens of Ukraine living in Poland. It is worth

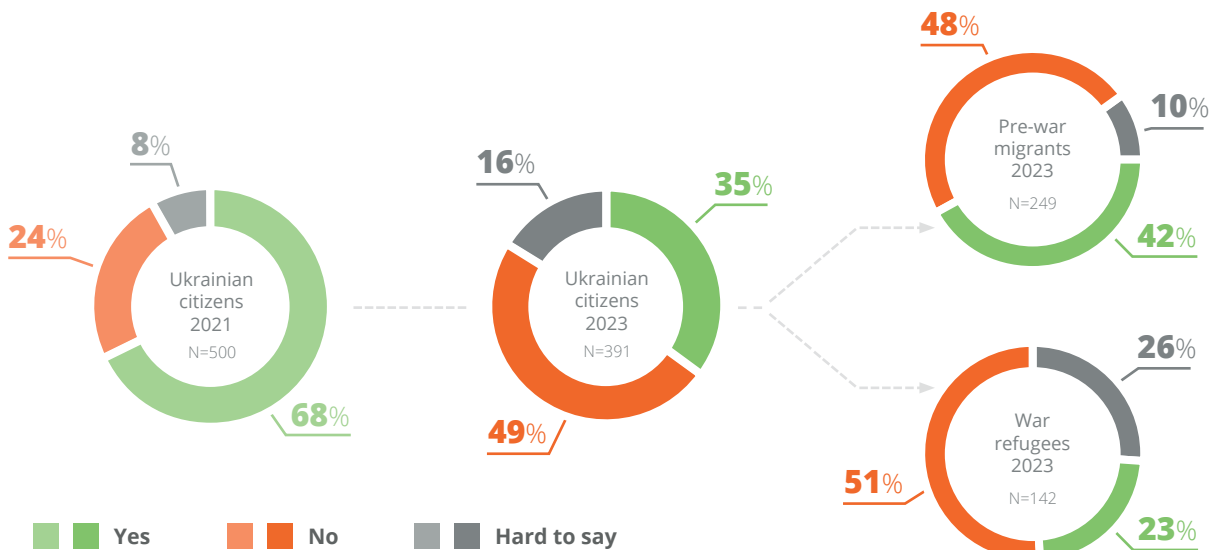
noting that pre-war migrants are slightly more likely to use Telegram and Facebook than war refugees. On the other hand, the opposite can be observed for Viber. Among the traditional media, which are significantly inferior to social media and message apps, Ukrainian citizens prefer TV – 23%, although it is watched by far fewer refugees than migrants.

Are you currently working in Poland?



Does your current job in Poland correspond to your qualifications?

(among respondents who work)

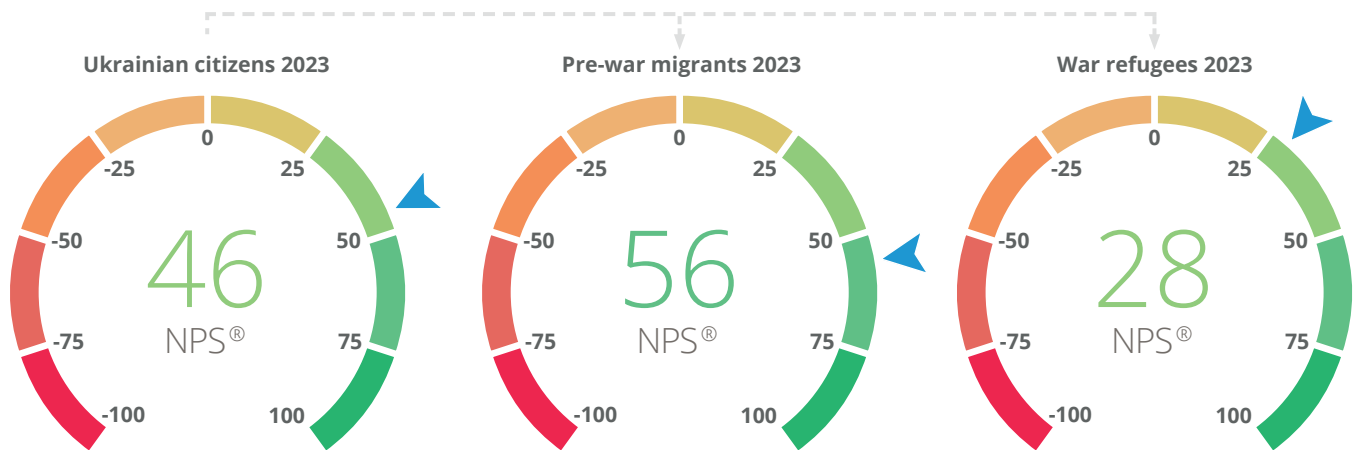
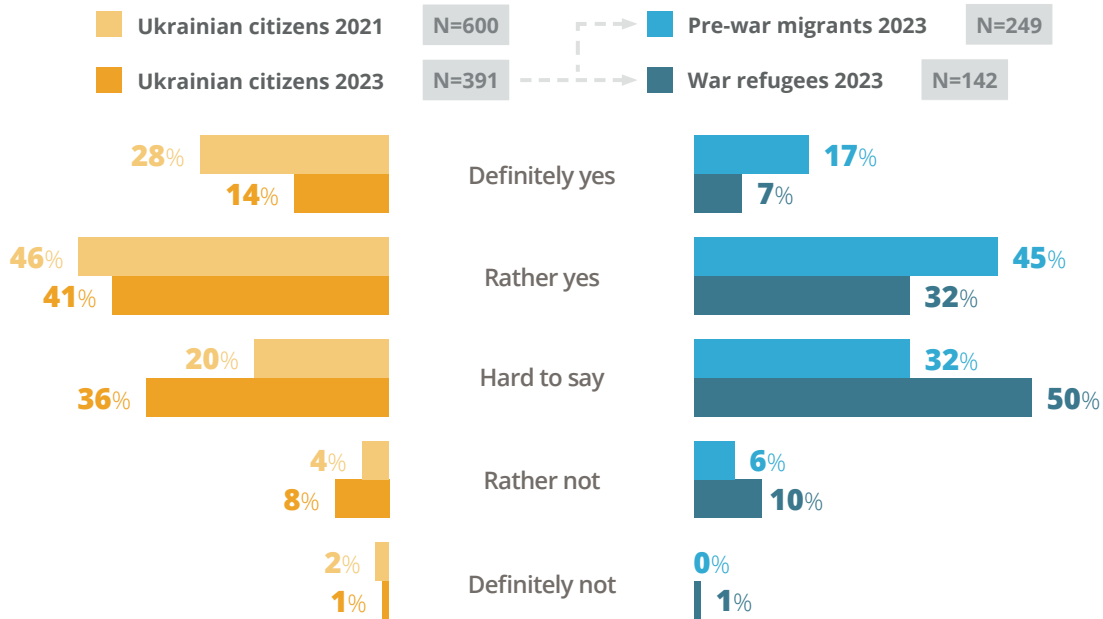


The vast majority, almost 80%, of Ukrainian citizens staying in Poland took up employment in our country. The percentage of employment is 12 percentage points higher among those who came to Poland before the war (83% vs. 71% among war refugees). This previously gained experience of working in our country and the stronger position of pre-war migrants on the Polish labour market. However, such a high level of overall employment of Ukrainian citizens indicates that they have integrated into the Polish labour market, which was influenced in no

small part by the so-called Special Act, which enabled the citizens of Ukraine to stay and work in Poland under more favourable conditions.

In relation to 2021, there has been a noticeable decrease in the percentage of Ukrainian employees performing work in Poland in line with their qualifications. In December 2021, almost 68% of respondents declared that they occupied positions matching their competences, while in 2023, this percentage was 35%.

Would you recommend working in Poland to your friends and relatives? (among respondents who work)



The mismatch between qualifications and performed work is particularly evident among war refugees who came to Poland after the start of the war. More than half of them declare that they do not work according to the acquired qualifications. However, it is worth emphasizing that this is due to the specific nature of refugee migration. We can expect that those migrants who decide to stay in Poland for a longer period will improve their language skills, and in the long term will look for a job matching their qualifications.

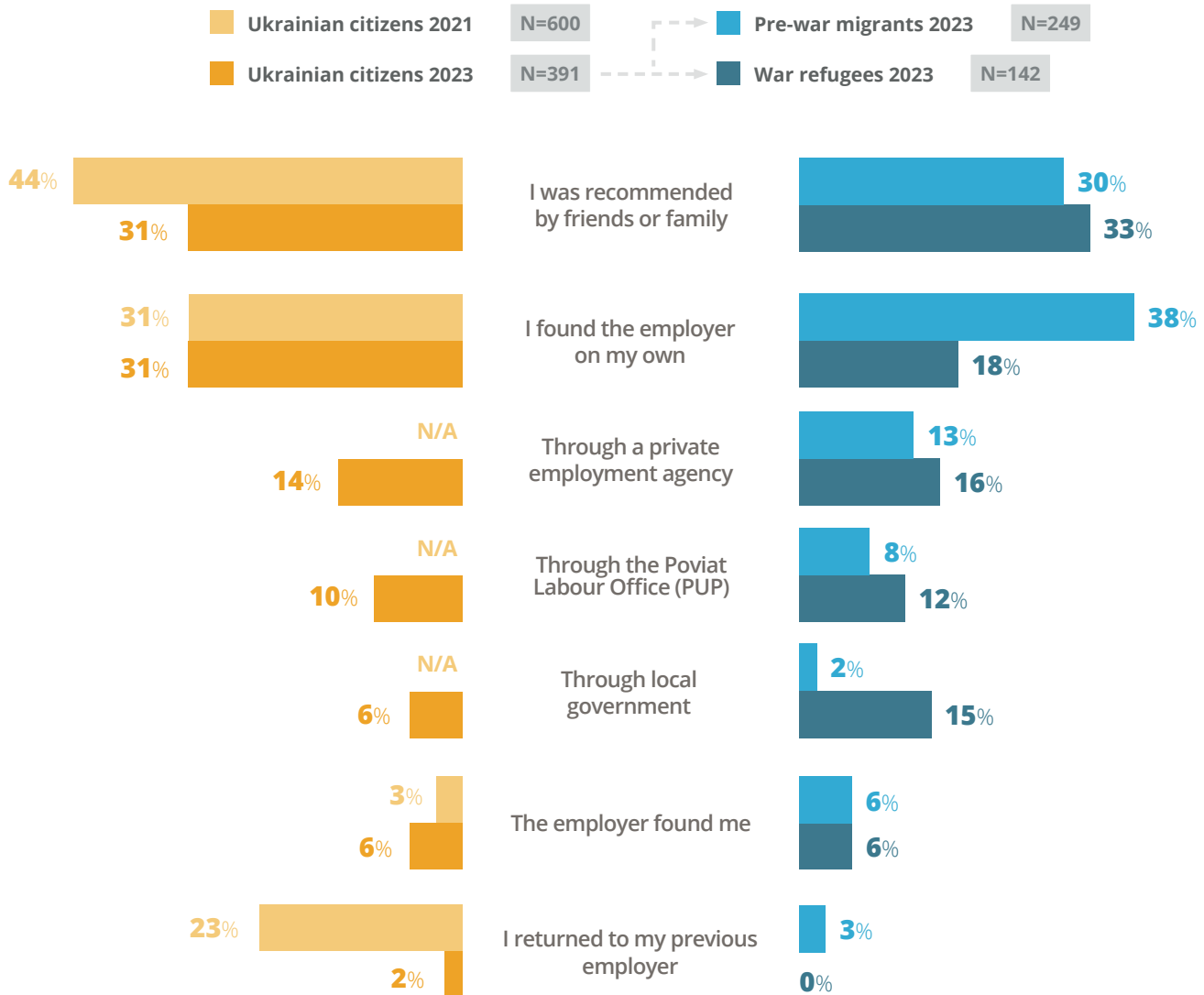
More than 70% of Ukrainian citizens in 2021 declared that they would recommend work in Poland to their friends and relatives. In 2023, the figure is 55%. However, it needs to be said that among Ukrainian citizens who came to Poland before the war this indicator remains

high – 62%. The situation looks different for war refugees. Only 39% of respondents would recommend working in Poland. The lower assessment of work in our country may be caused by the frequent mismatch between the qualifications of war refugees to their current work in Poland and the need for migration itself.

Furthermore, the NPS (Net Promoter Score) of 56 indicates that the majority of Ukrainian pre-war migrants working in Poland are satisfied with their employment and working conditions, which leads them to recommend working in the country to their relatives and friends. In the case of working war refugees, the NPS is only 28, which can also be seen as a good result, considering that the majority of Ukrainian citizens fleeing the war found jobs in Poland below their qualifications.

How did you find your current job in Poland?

(among respondents who are working)



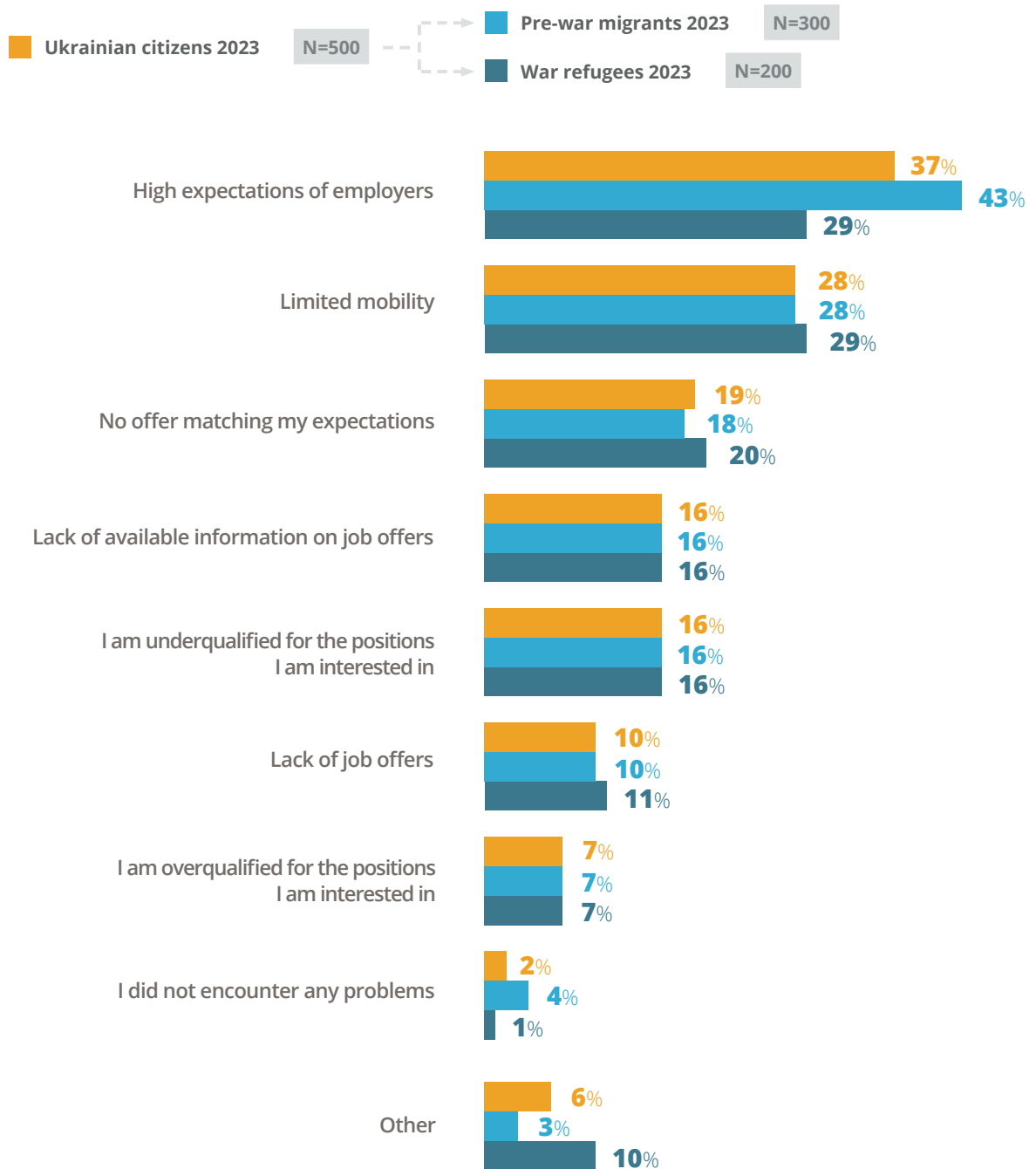
In both 2021 and 2023 the majority of Ukrainian citizens found a job in Poland thanks to recommendations from friends and family or on their own. The percentage of those who benefited from the support of relatives decreased by 13 percentage points. This is reflected in the context of returning workers. Compared to 2021 the percentage of employees who returned to their previous employer decreased from 23 per cent to just 2 per cent.

It is noteworthy that in the case of labour migrants who arrived in Poland before the war, as many as 38% found employment on their own. This demonstrates not only the resourcefulness of labour migrants, but also that the citizens of Ukraine have become an integral part of the Polish labour market. In the case of war refugees this percentage was significantly lower, amounting to only

18%. However, it should be said that it was compensated by the support from both local governments and state institutions, which had a significant impact on the labour market activation of Ukrainian citizens fleeing the war. This is particularly evident in the context of refugees who arrived in Poland after the war started – 27% declare that they found a job precisely thanks to the poviats labour offices or support from the local government. It ought to be stressed that 16% of refugees found their current jobs thanks to private employment agencies.

In 2023, twice as many respondents declared that it was the employer who found them. This factor shows that Polish entrepreneurs have played a huge role not only in the material support for refugees, but also in their labour activation.

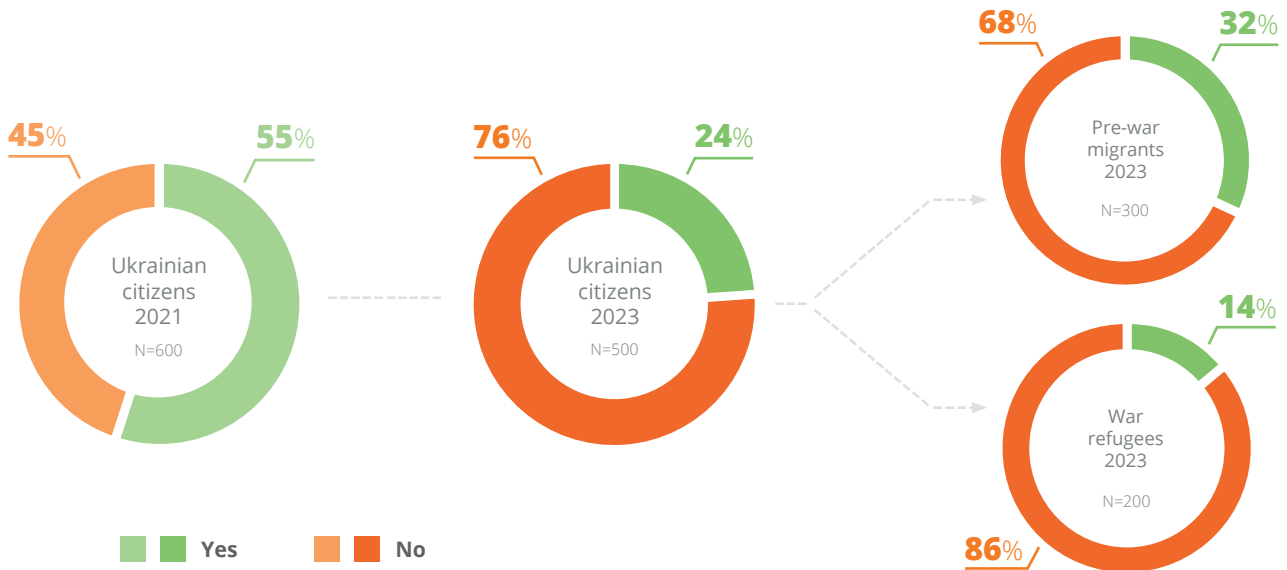
What problems did you most often encounter during your job search? (multiple responses possible)



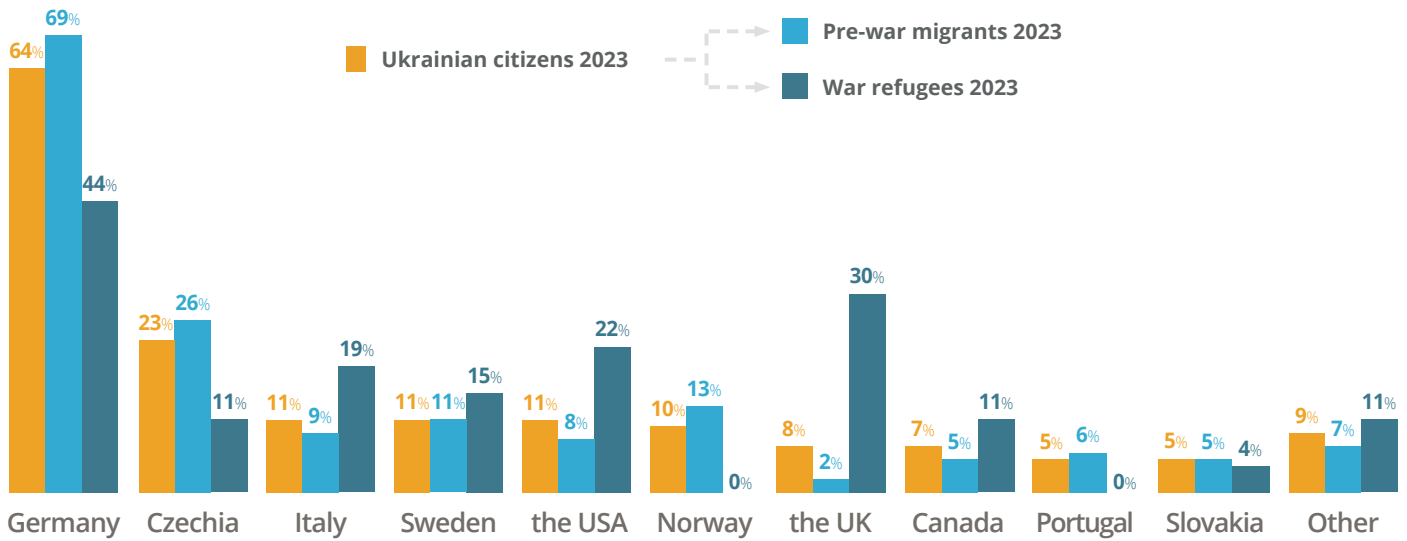
The main problem indicated by the citizens of Ukraine working in Poland are high expectations of Polish employers (37%) and limited mobility (28%). This problem affects to a greater extent economic migrants who found themselves in the country before the war (43% and 28%), but it is not unknown to war refugees (29%). The third most significant problem from the point of view of war refugees in their search for work is the lack of an

offer matching their expectations (20%). Among other difficulties faced by Ukrainian citizens, both pre-war migrants and refugees, the following were mentioned: lack of available information about job offers, having too low or too high qualifications for the positions of interest and lack of job offers. In contrast, 4% of war refugees admitted that they did not encounter obstacles when looking for a job.

During the last year, were you looking for employment in countries other than Poland?



In which countries were you looking for employment? (among respondents who looked for work, multiple responses possible)

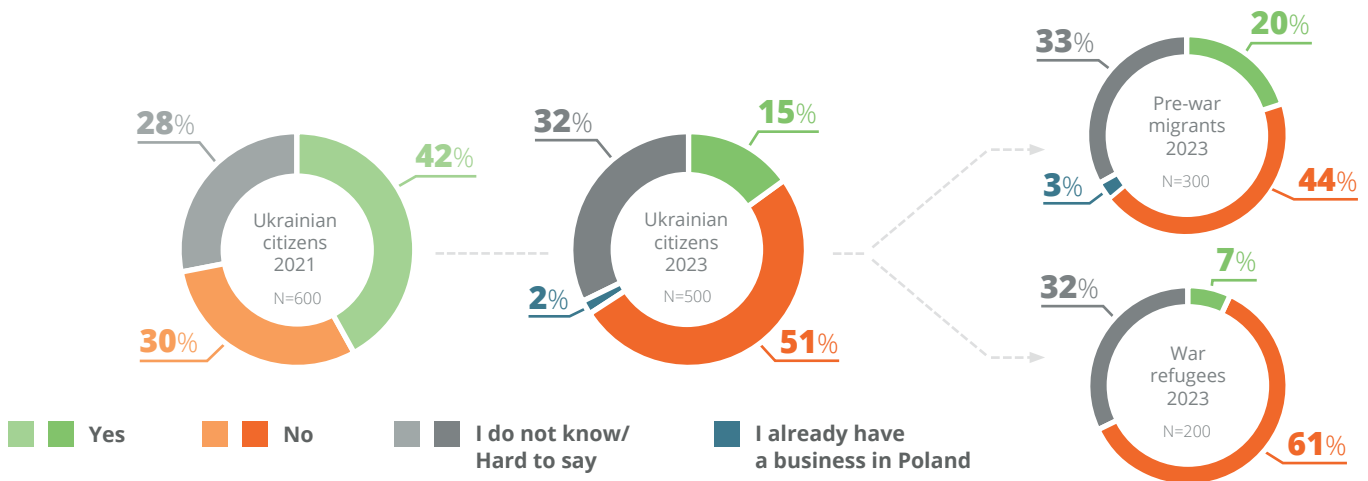


According to the results of the study, the willingness to look for work in other countries other than Poland decreased among the citizens of Ukraine in Poland. In 2021, more than half of them declared that they were looking for work outside Poland. In 2023, the percentage is twice as low (24%), while among the refugees it is only 14%. This may indicate that Poland has adequately met the needs of Ukrainian citizens in terms of labour activation and has met their expectations (both of those who fled from the war and those who sought employment in Poland).

Germany is still the main country of alternative migration. Currently, almost 2/3 of Ukrainians indicate this country as the country in which they sought employment. This increase may result from the changes in European migration law introduced in connection with the Russian aggression and from Germany's huge demand for foreign workers.

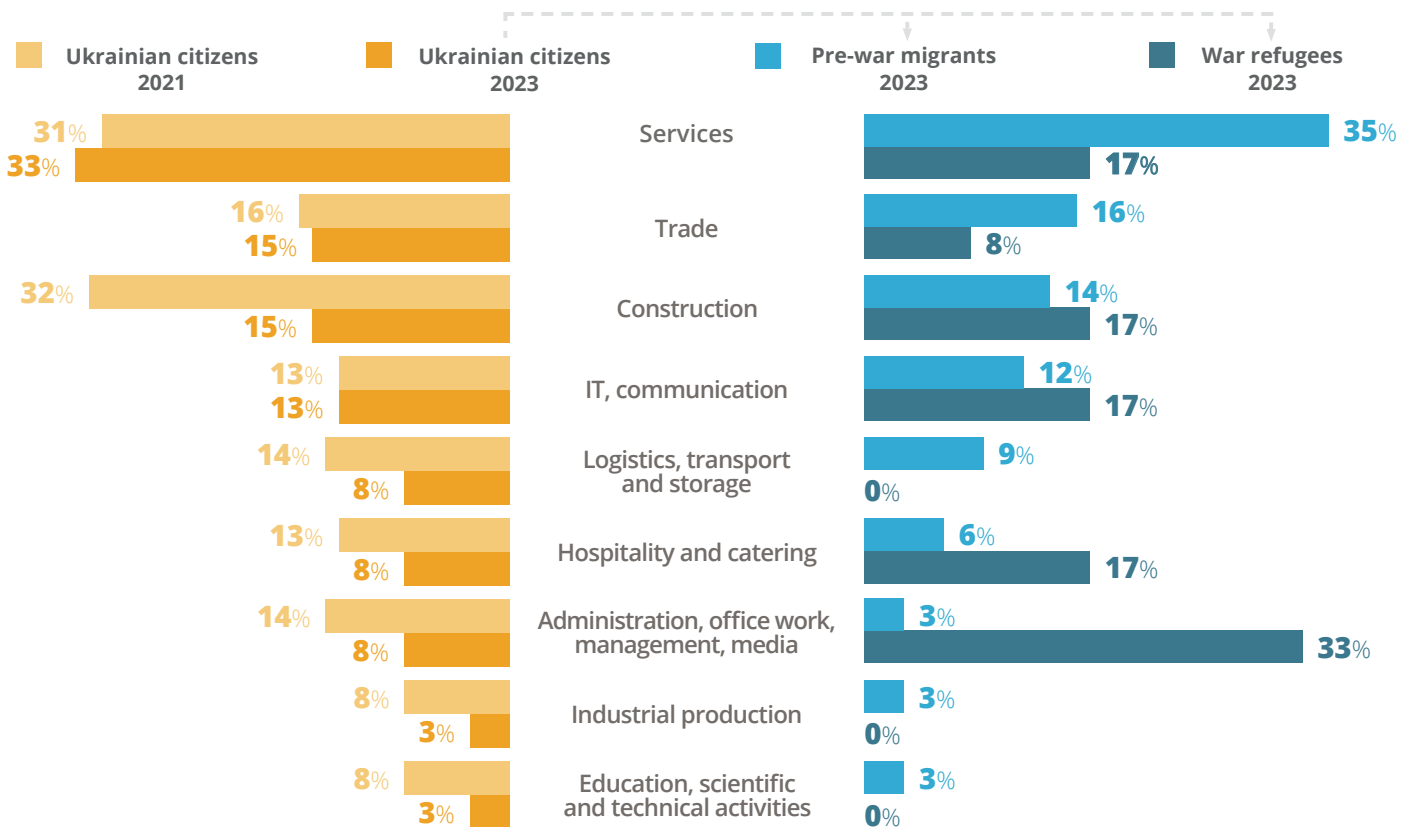
Czechia was traditionally in second position (23%), but it is worth noting that the level of seeking employment in this country decreased compared to December 2021 by 6 percentage points.

Are you considering opening your own business (economic activity) in Poland?



In which industry are you considering opening your own business in Poland?

(among those who are considering opening a business, multiple responses possible)



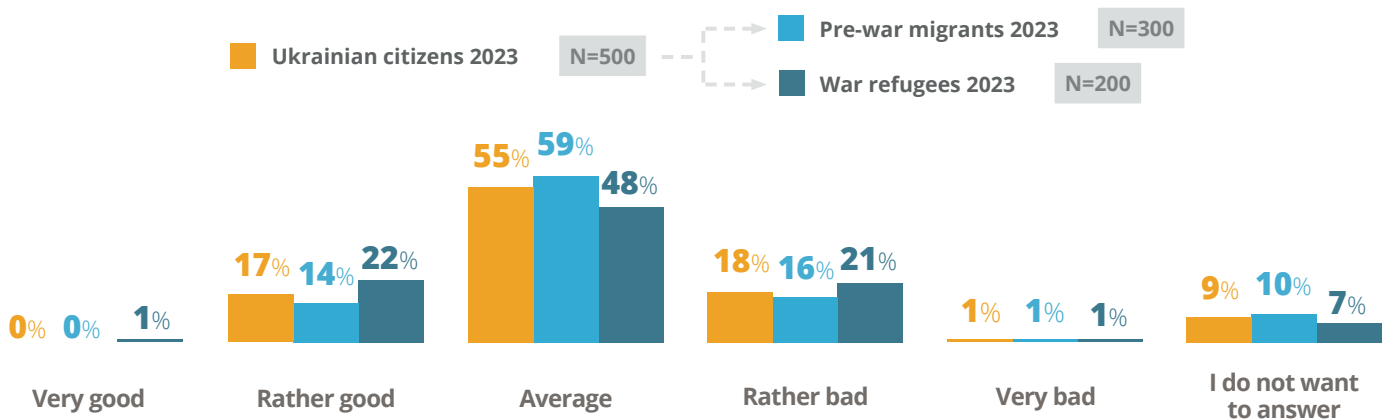
Compared to 2021, the percentage of those willing to open their own business in Poland fell almost three times, to 15%. The percentage is higher among pre-war migrants (20%), compared to war refugees (7%). This may be caused by the temporary stay in Poland of the latter and their eventual return to Ukraine.

In comparison of 2021 to 2023, we do not observe any major changes in the context of the most frequently chosen industries by Ukrainian citizens in which they

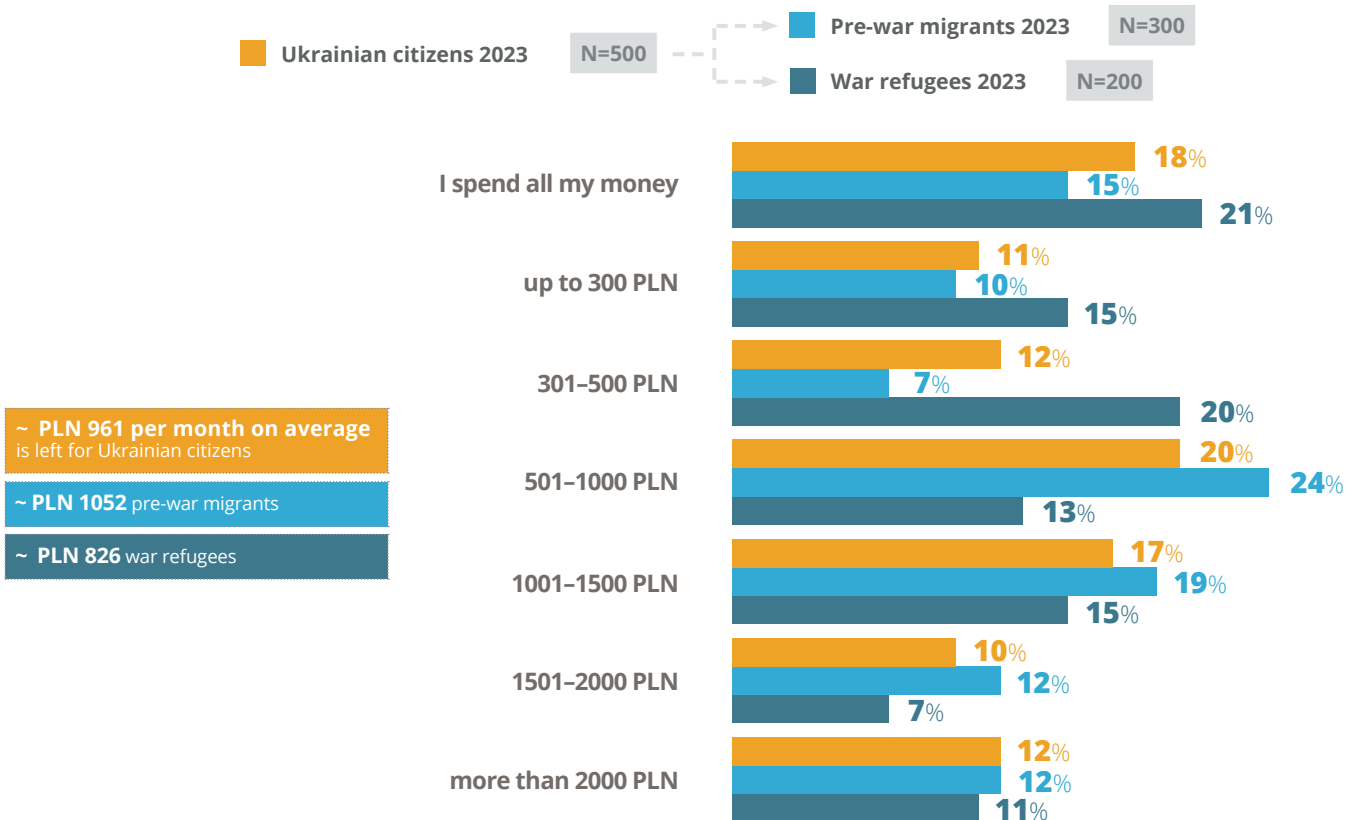
would consider opening a business in Poland. Services and trade continue to gain the most interest as potential industries for starting a business. However, far fewer people (15% vs. 32% in 2021) declare a desire to do business in the construction industry. This might be due to the difficulties in this sector related to the economic situation, which has been affected by the pandemic (the breaking of supply chains) and the war in Ukraine (restrictions in the departure of men from that country).

FINANCIAL SITUATION

How do you assess your financial situation?



How much money do you have left each month after paying all expenses related to your stay in Poland?



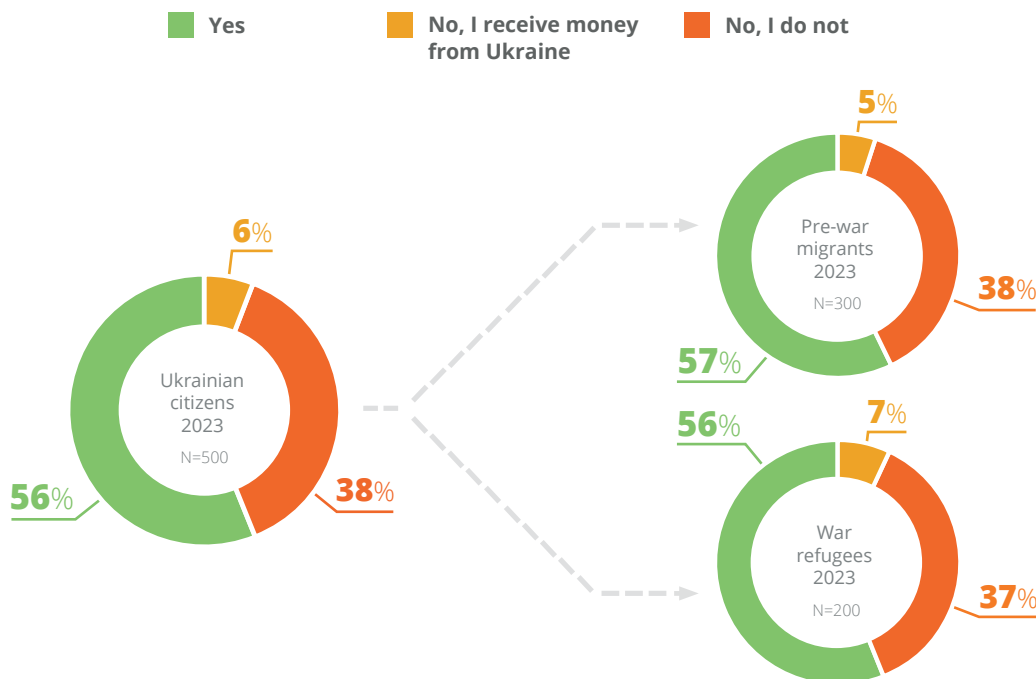
Ukrainians living in Poland mostly (55%) assess their financial situation as average. It is interesting to note that a rather good financial situation is more often indicated by war refugees (22%) than by pre-war migrants (14%). This may indicate that, as a result of the war, Ukrainian citizens came to Poland with varying levels of wealth.

Almost 1/5 of Ukrainian citizens in Poland declare that after paying all monthly expenses for the living they are

left with PLN 501-1000. This percentage is significantly lower in the case of war refugees (13%), compared to pre-war migrants (24%). Ukrainian citizens are left on average with around PLN 961 per month after paying all expenses related to their stay in Poland. In the case of pre-war migrants, this amount is about PLN 1052, and in the case of war refugees it is about 1/4 less (about PLN 826).

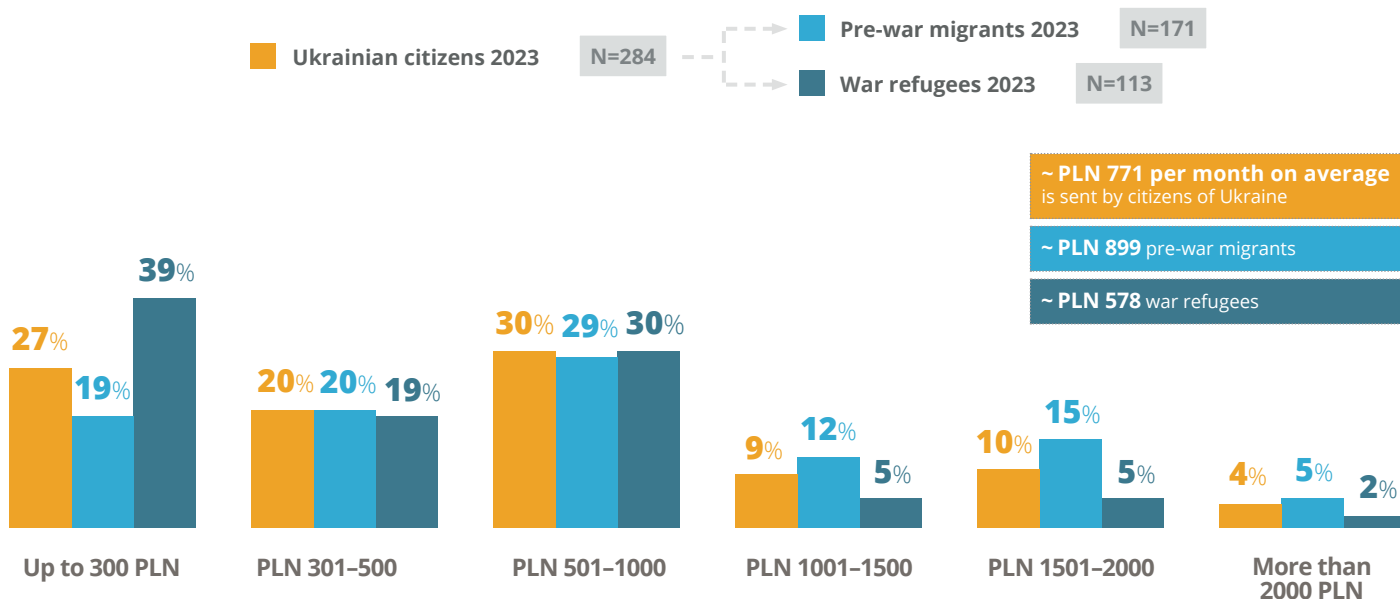
TRANSFERRING MONEY TO/FROM UKRAINE

Do you send money to Ukraine?



What amount do you send to Ukraine monthly?

(among respondents who send money)

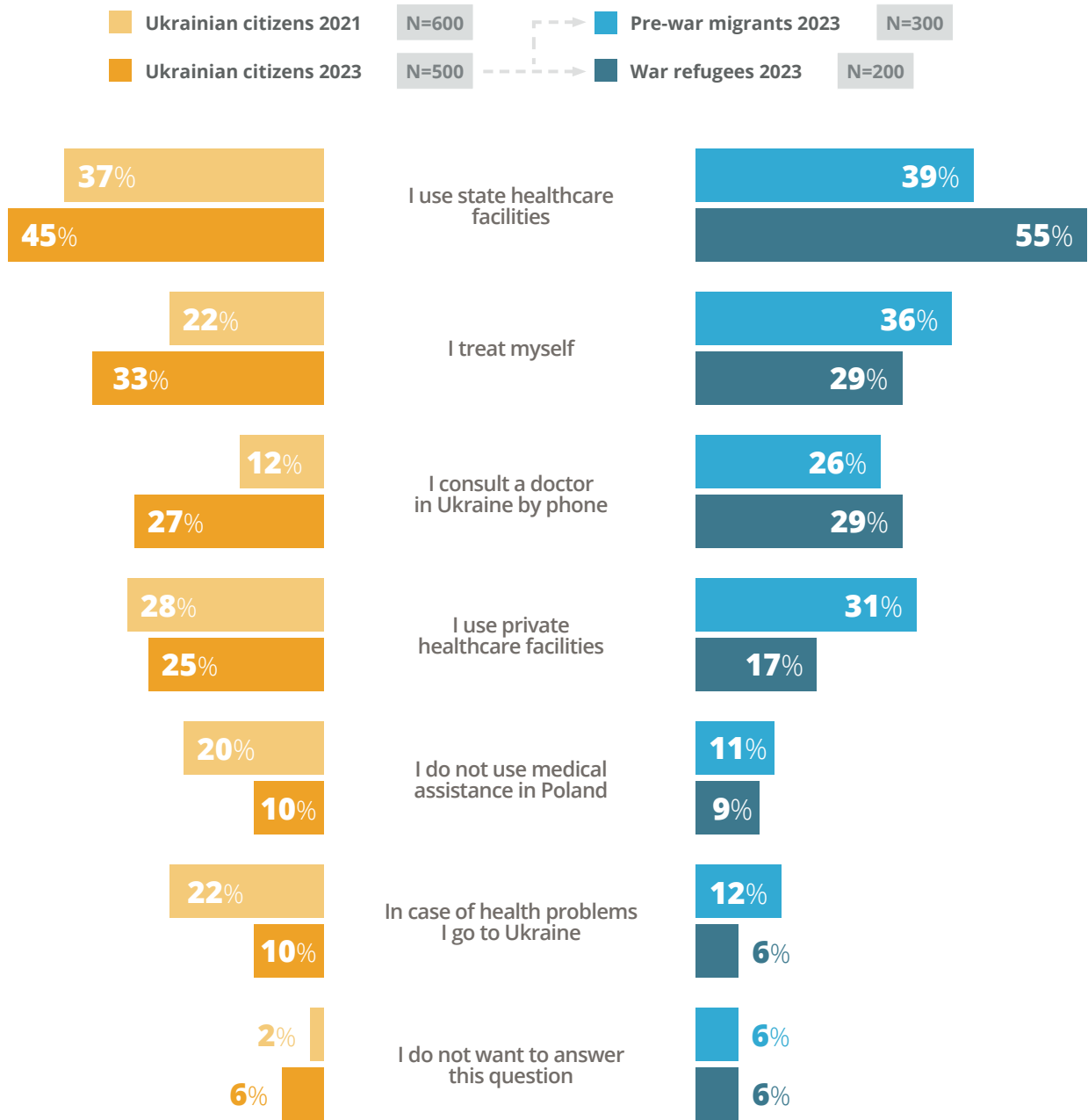


More than half of Ukrainian citizens in Poland declare that they send money to Ukraine. This demonstrates that both migrants who arrived in Poland before and during the war, as well as war refugees, have found work or another source of income which allows them to do so.

The largest number of Ukrainian citizens (30%) declares that they send PLN 501-1000 to Ukraine per month.

Ukrainian citizens send to Ukraine on average around PLN 771 per month. In the case of pre-war migrants this amount is about PLN 899, and in the case of war refugees it is about 1/3 less (approximately PLN 578). This may indicate that refugees from Ukraine spend most of the funds on supporting their family members, including children who came to Poland with them.

How do you usually use healthcare in Poland? (multiple responses possible)

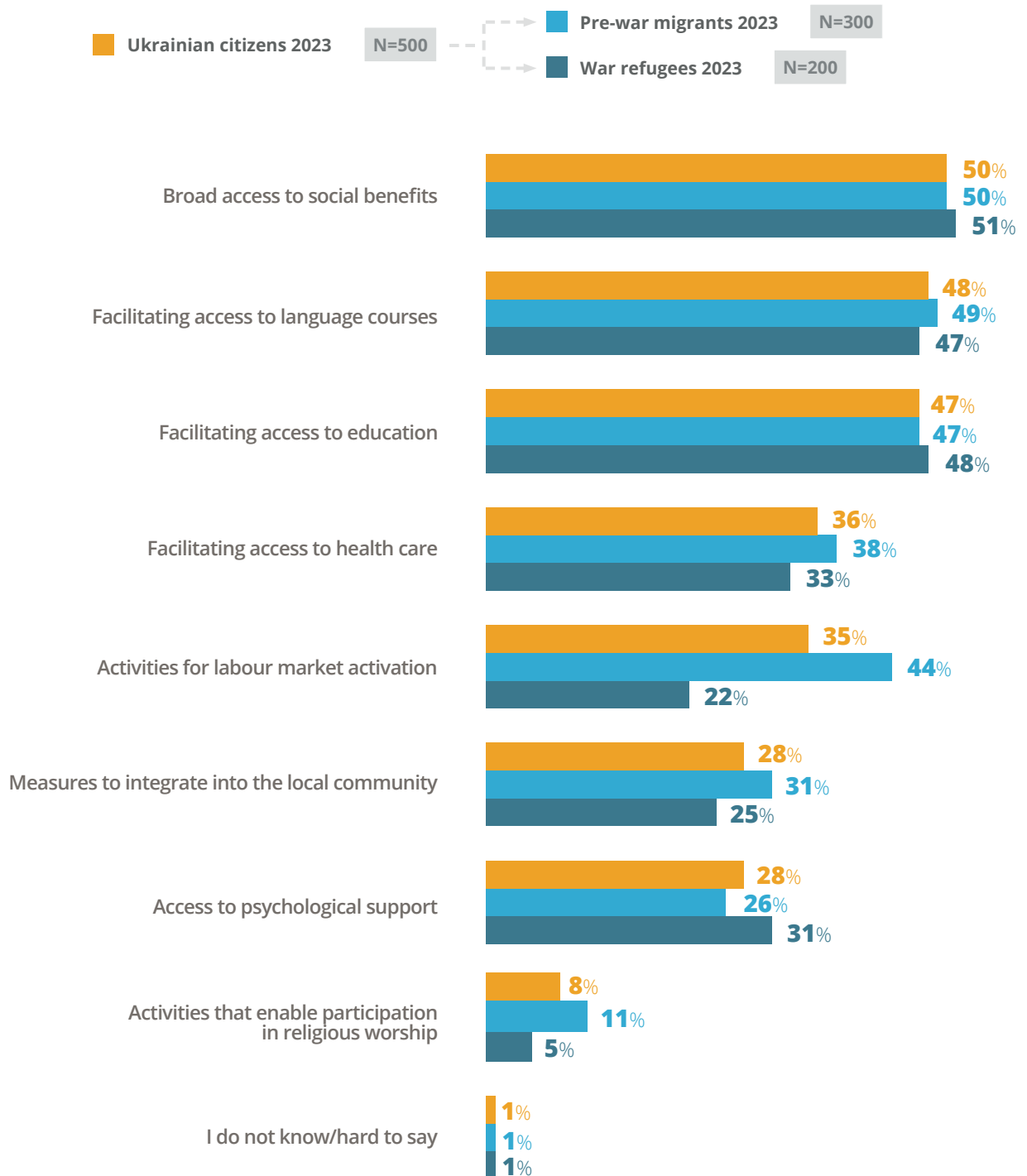


The study shows that Ukrainian citizens in Poland are increasingly less likely to travel to Ukraine to receive treatment. This is evidenced by the almost twice lower declaration of respondents compared to the survey of 2021 about going to their country in the context of undertaking treatment (10% vs. 22%). Undoubtedly the main reason for such a decision are the fears and difficulties associated with the ongoing war in Ukraine. At the same time, the percentage of those declaring self-treatment increased one and a half times (33% against 22%). One can conclude that this is also one

of the consequences of the Covid-19 pandemic, which significantly influenced the development of telemedicine.

In addition, the percentage of Ukrainian citizens declaring the use of state-run medical facilities increased by 8 percentage points. It is related to the ongoing adaptation of Polish medical facilities to the needs of foreigners and the gradual adaptation of migrants themselves to the Polish health care system, as well as the facilitations resulting from the special law in the context of refugees (the majority of them – 55% declares using state healthcare).

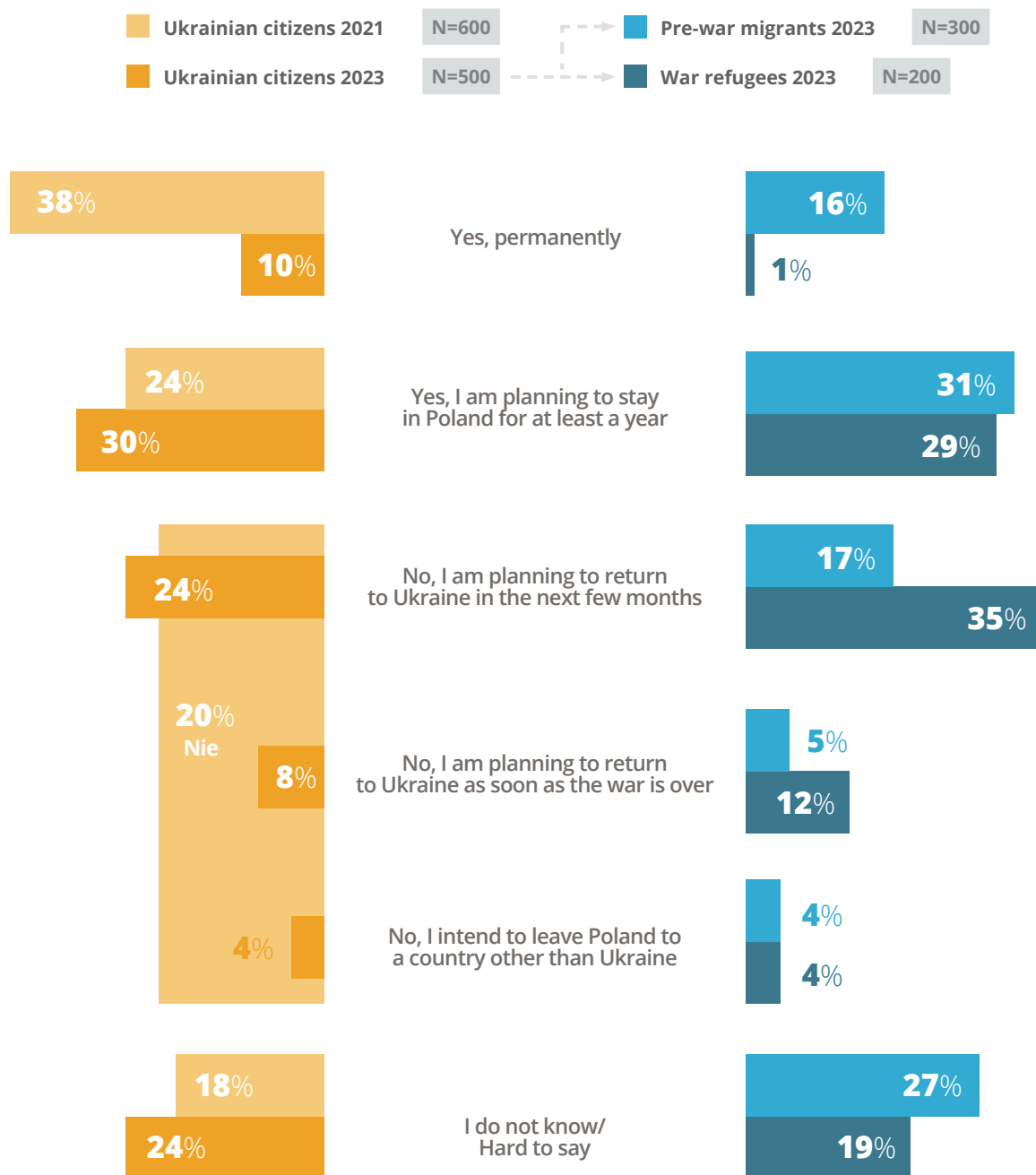
What, in your opinion, fosters the integration of Ukrainian citizens in Poland? (multiple responses possible)



In the opinion of Ukrainian citizens in Poland (both pre-war migrants and war refugees), the main factor fostering their socio-cultural integration in Poland is broad access to social benefits (50%), language courses (48%), education (47%) and health care (36%). This demonstrates that from the point of view of foreigners

both fleeing the war and those seeking work in Poland before the outbreak of the war, social integration should take place once the basic needs have been met. It is worth emphasising that activities that enable activation onto the labour market are particularly important for pre-war migrants (44% vs. 22% among war refugees).

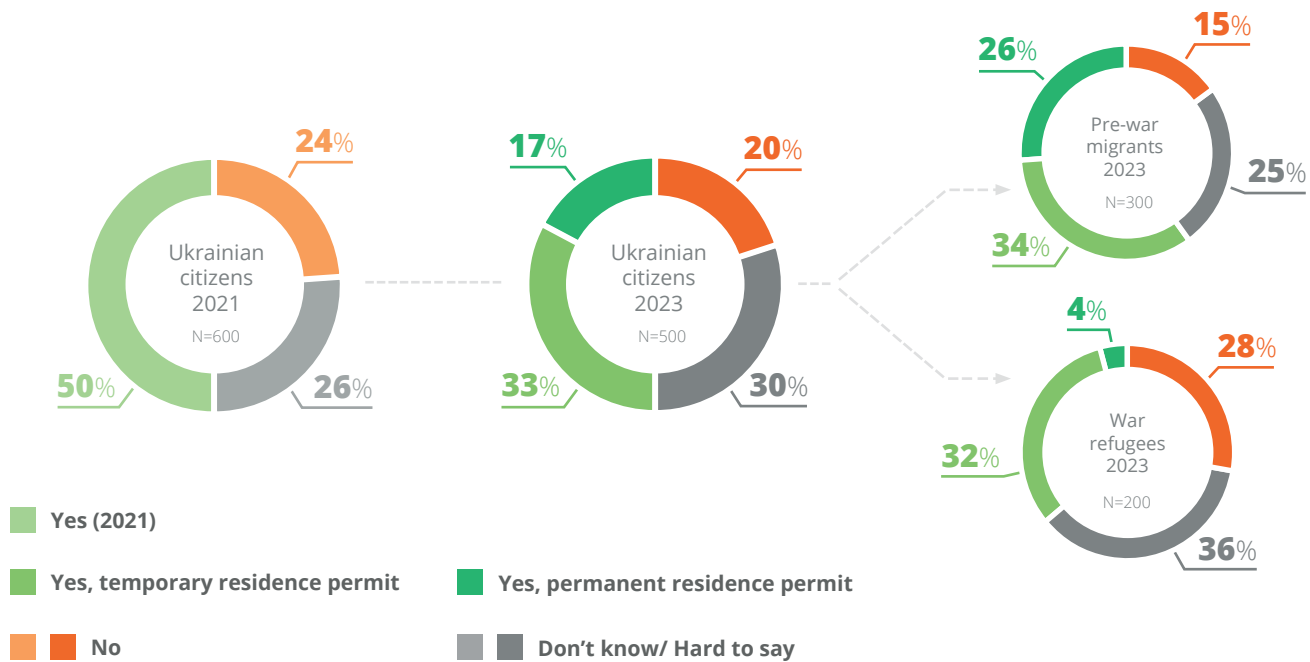
Are you planning to stay in Poland for a longer period?



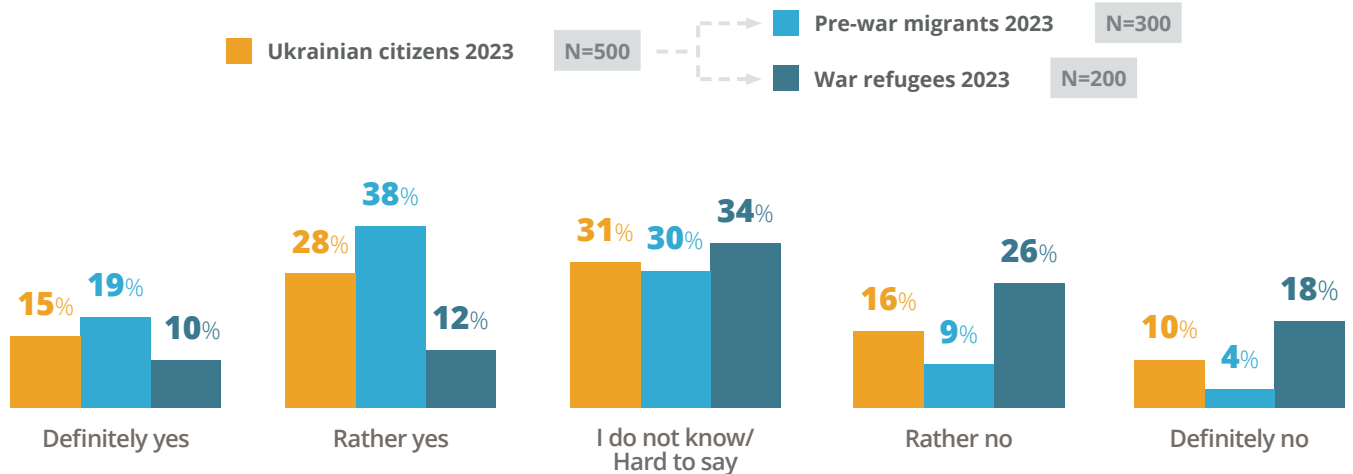
Compared to December 2021, the percentage of Ukrainian citizens wishing to stay in Poland for a longer period decreased from 62% to 40%, including a fourfold decrease of those who want to stay permanently. Nevertheless, this is a good signal for the Polish labour market, which is still in need of foreign workers, including those from Ukraine. An important aspect in the context of further integration of Ukrainian citizens in Poland is to guarantee them legal security and opportunities for professional development and social integration.

Every third Ukrainian citizen declares to return home, including 24% who wish to return without waiting for the end of the war. It is noteworthy that twice as few Ukrainian pre-war migrants (22%) want to return in the near future to their homeland as war refugees (47%). This results from a longer stay in Poland and transferring their life centre to this country, whereas for most war refugees Poland is a transitional country or an alternative place of stay rather than the final destination of migration.

Are you planning to apply for a temporary or permanent residence permit in Poland (residence card)?



Are you interested in applying for Polish citizenship in the future?



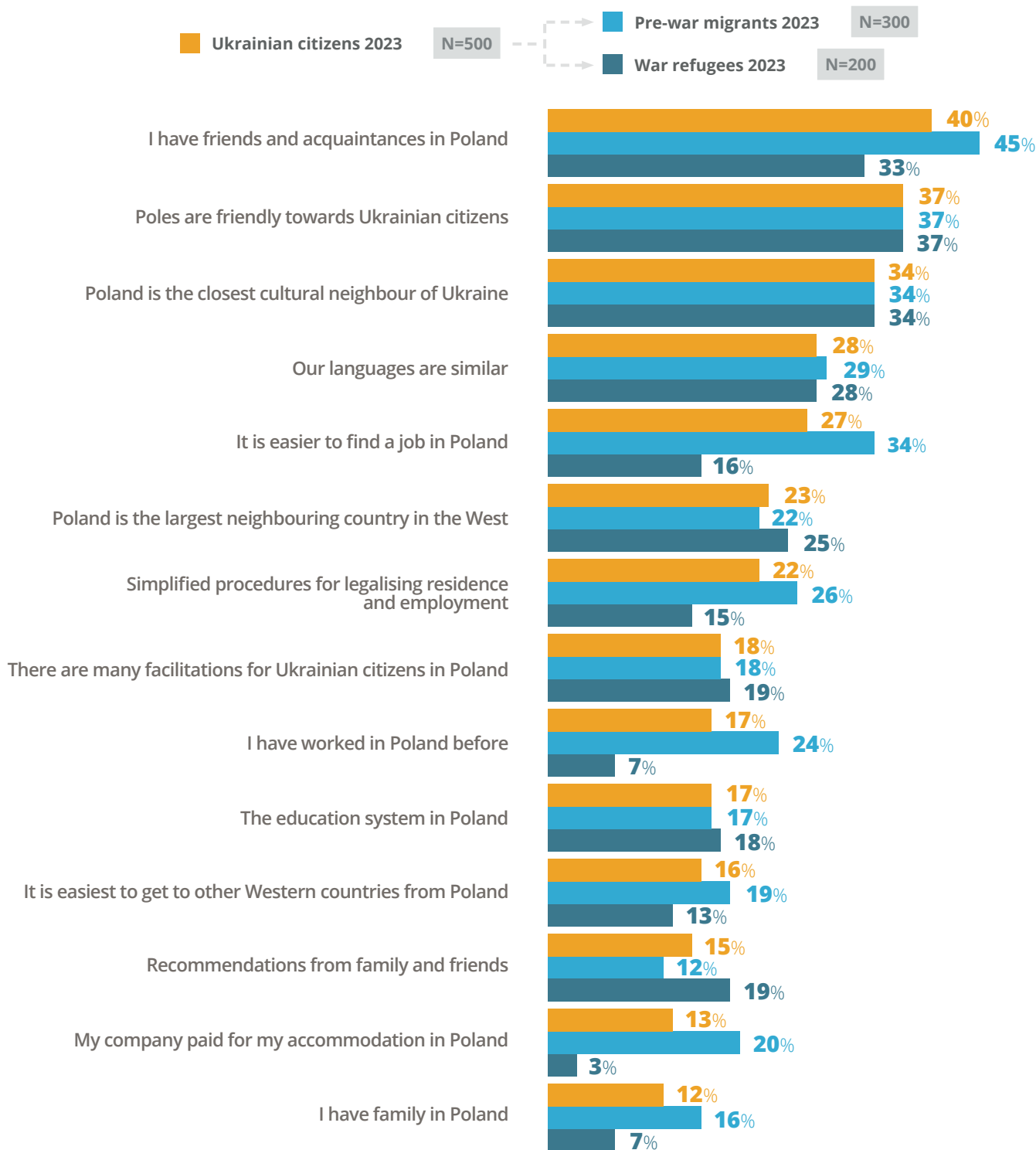
50% of Ukrainian citizens in both 2021 and 2023 declare their willingness to formally apply for a longer stay in Poland (permanent or temporary residence permit). Among war refugees, the percentage is lower and constitutes 36% compared to 60% among pre-war migrants (with half as many undecided). One can reach a conclusion similar to those in the earlier reports, that pre-war migrants perceive Poland as a country to stay in for the long term, while for war refugees Poland is a place of temporary refuge from the war and its consequences. This is also linked to a doubling of the desire to return to

Ukraine among the refugees.

It seems interesting that more Ukrainian citizens are determined to apply for a Polish passport (15%) than those who declare a desire to live in our country permanently (10%). This difference can be explained by the opportunities offered by citizenship of EU countries, i.e., in terms of free movement. Moreover, having an EU citizenship is a certain privilege and guarantee of security for the citizens of Ukraine that is aspiring to become an EU member state.

What encourages you to stay in Poland for longer?

(multiple responses possible)

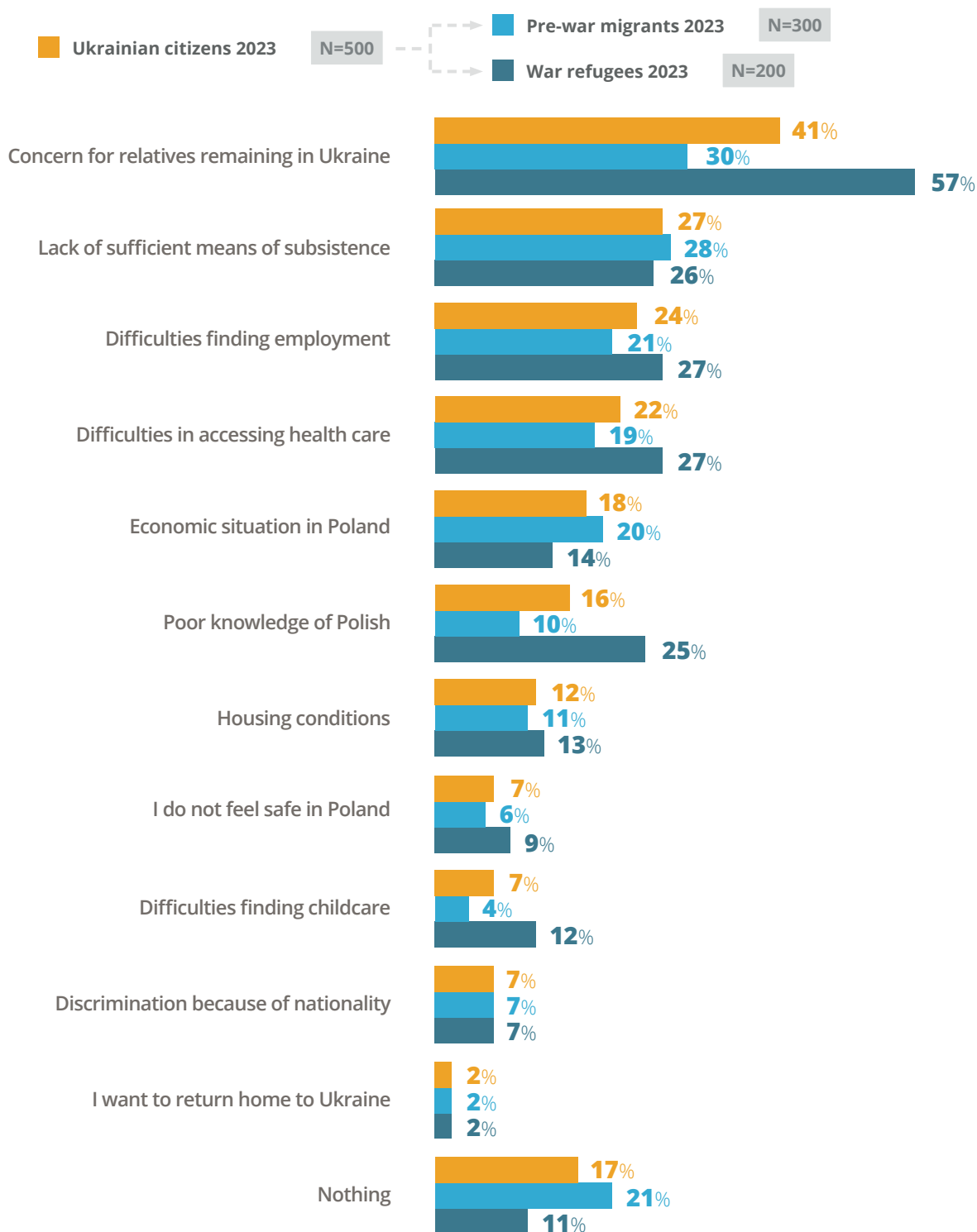


Among the main reasons for staying in Poland Ukrainian citizens mention above all the socio-cultural factors. Having friends and acquaintances in Poland (40%), the friendly attitude of Poles (37%) and cultural (34%) and linguistic (28%) proximity are the main factors why Ukrainian

citizens would like to stay in Poland for a longer period. These were followed by reasons of economic nature, such as the possibility of taking up employment (27%) and liberal procedures for legalisation of residence and work in Poland (22%).

What discourages you from staying in Poland for longer?

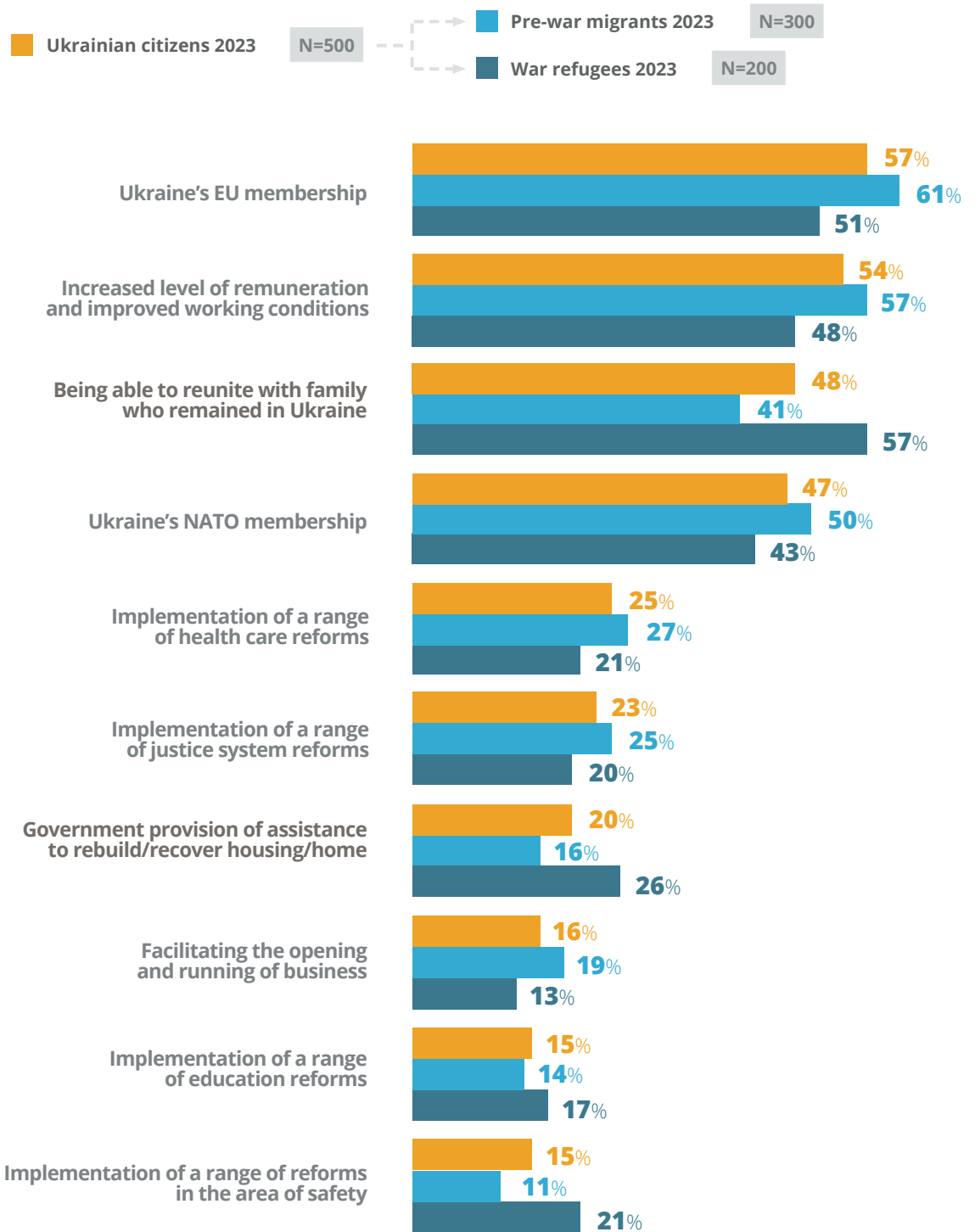
(multiple responses possible)



The main factor discouraging Ukrainian citizens from staying in Poland is primarily their concern for relatives in Ukraine (41%), as well as economic factors, including lack of sufficient means to afford a living (27%) and

difficulties with finding employment (24%). It is worth emphasising that because of poor knowledge of Polish 25% of war refugees and 10% of pre-war migrants may leave our country.

What would most motivate you to return to Ukraine after the end of the war? (multiple responses possible)



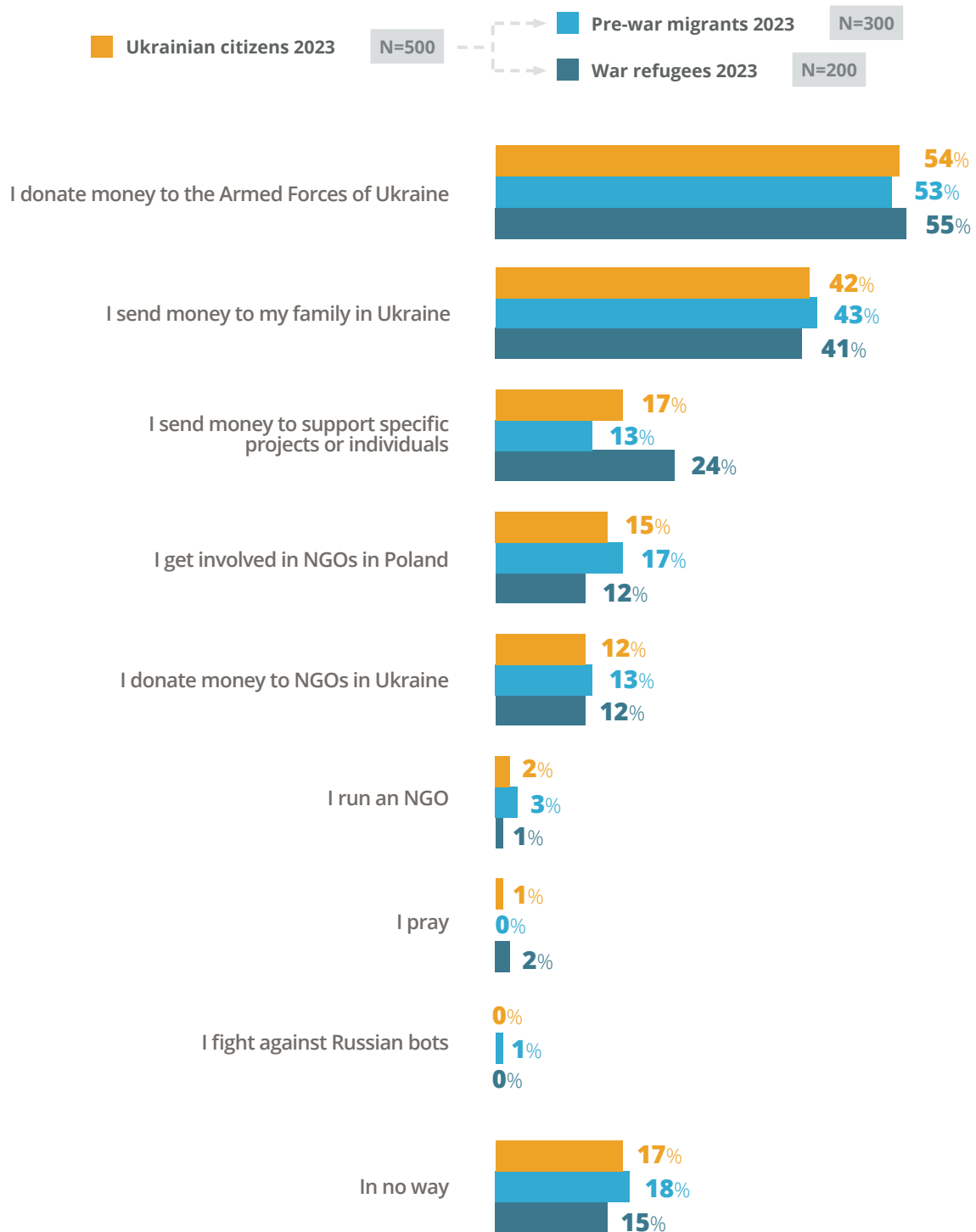
Among the most motivating factors to return to Ukraine after the war respondents point above all to the issue of Ukraine's civilisational choice and safety (Ukraine's expected membership of the EU – 57% and

NATO – 47%), economic issues (increased wage levels and improved working conditions – 54%) and social issues (possibility to reunite with family who stayed in Ukraine – 48%).

SUPPORT FOR UKRAINE DURING THE WAR

How do you support Ukraine in the ongoing war?

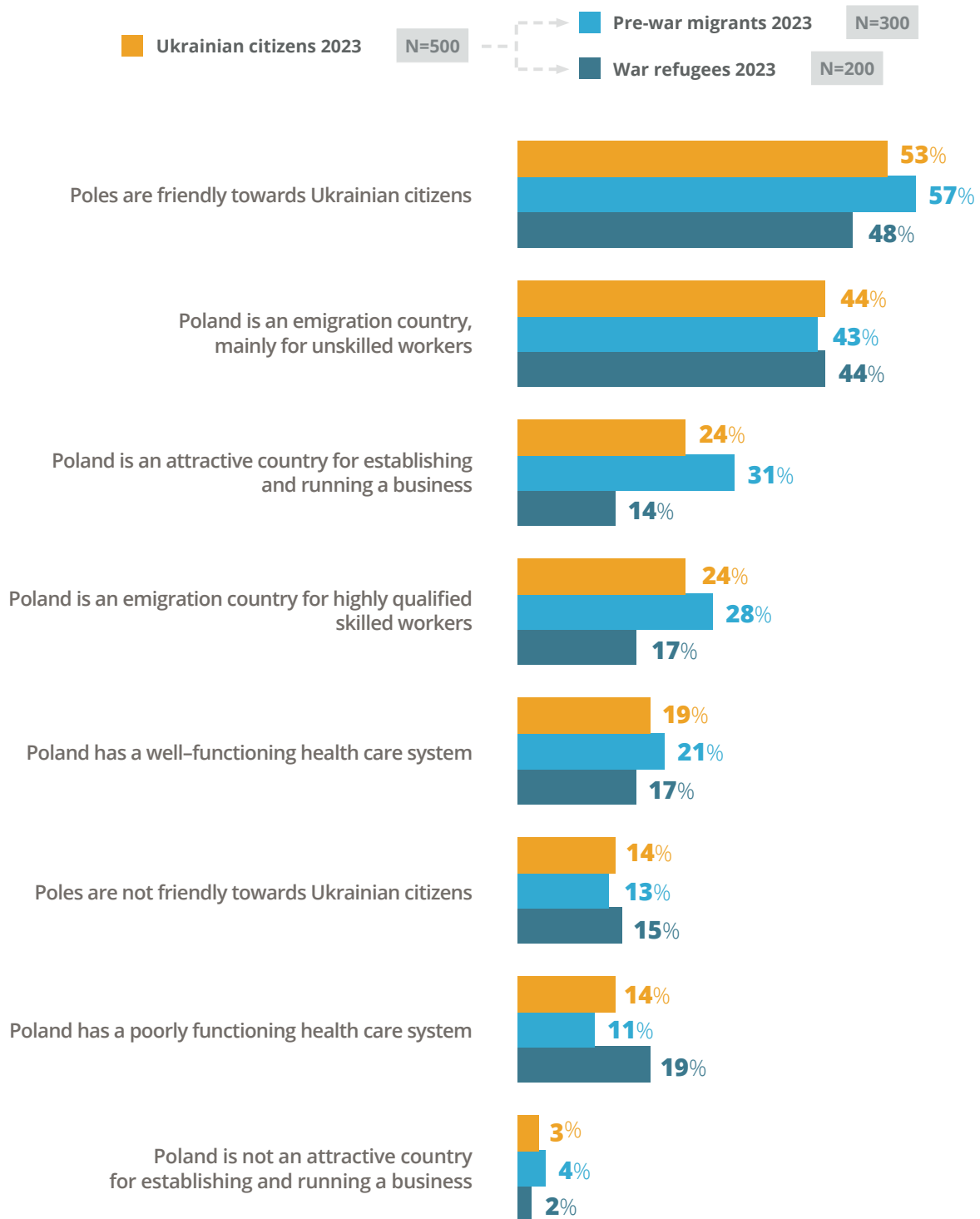
(multiple responses possible)



More than half of Ukrainian citizens in Poland declare that they support their homeland by donating money to the Ukrainian Armed Forces, while more than 40% send money to their family. War refugees, compared to pre-war migrants, are almost twice as likely to choose to support specific projects or individuals (24% vs. 13%).

In addition, 15% of respondents declare that they are involved in the activities of NGOs in Poland. These results testify to the accompanying need to help their homeland, compatriots residing in Poland and the diversification of the way of supporting the fighting Ukraine.

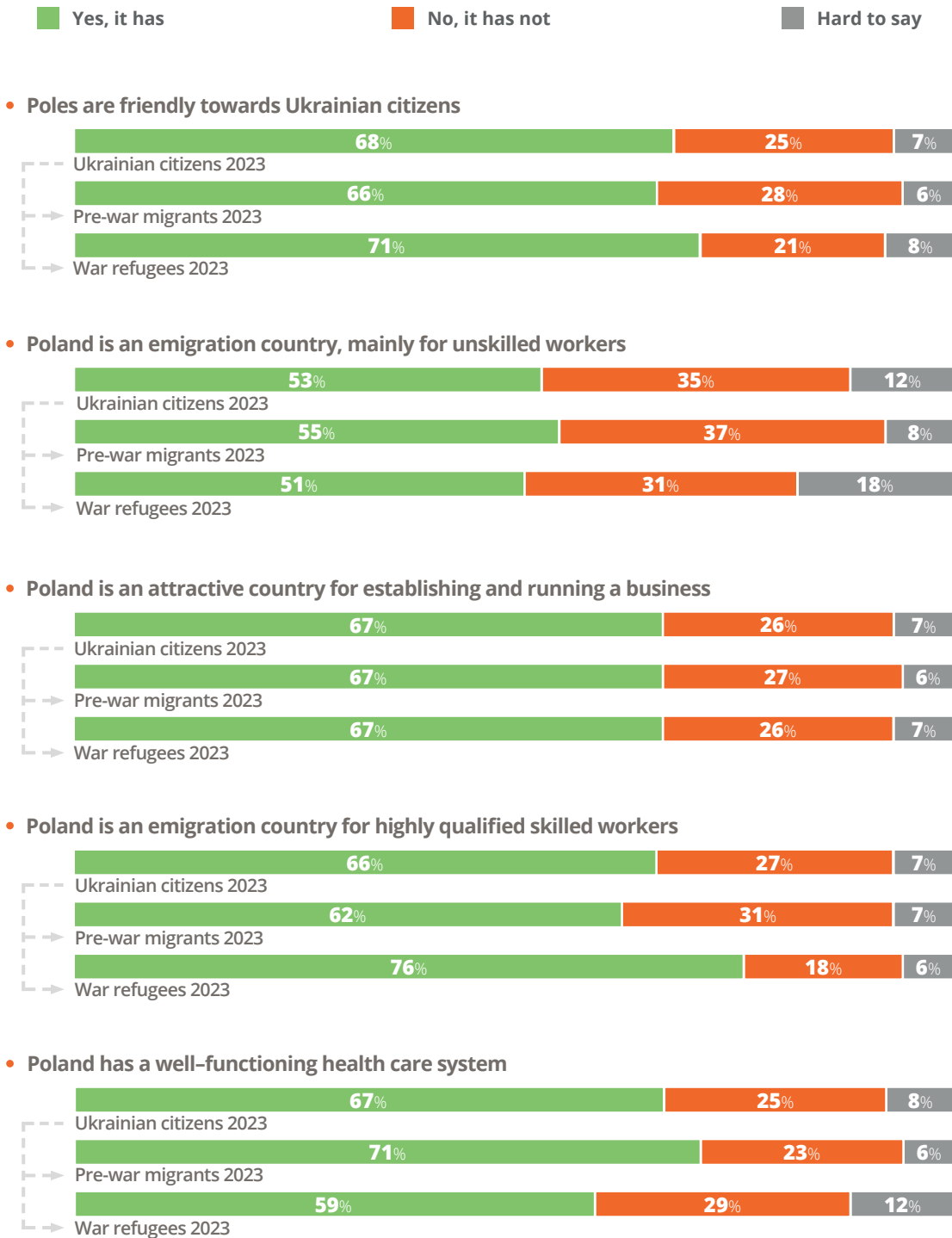
What did you know about Poland before coming to this country? (multiple responses possible)



The first three associations with Poland among both economic migrants and war refugees are: the positive attitude of Poles towards Ukrainians, Poland being a country for unskilled workers and that it is an attractive country for running a business.

The three groups of respondents were of a similar opinion that Poland was a country of emigration for unskilled workers mainly. Nearly 10% fewer war refugees than migrants from Ukraine in Poland in 2023 considered Poland as a country friendly to Ukrainians. However, the figure is still high – 48%.

Has your stay in Poland confirmed your previous knowledge of Poland? (among those who had specific beliefs)



The belief that Poles are friendly towards Ukrainian citizens was confirmed by more than 2/3 of respondents, as well as the fact that Poland is an attractive country for establishing and running a business and that Poland

is an emigration country for highly qualified employees. In contrast, the belief that Poland is a country for unskilled workers was confirmed by 53% of Ukrainian citizens in Poland.

METHODOLOGY

The study with pre-war migrants and war refugees from Ukraine staying in Poland was conducted between 4–13 March 2023 by means of F2F interviews.

The interviews were conducted in Ukrainian on a sample of a total of N=500 adult citizens of Ukraine who are currently in Poland, including: N=300 with Pre-war migrants from Ukraine who arrived in Poland before 24 February 2022, and N=200 with war refugees from Ukraine who arrived in Poland after 24 February 2022.

The division of the sample into two groups (60% – pre-war migrants who arrived in Poland before 24 February 2022, 40% – war refugees who arrived in Poland after 24 February 2022) was based on the assumption that the number of adult pre-war migrants is approximately 1.5 million, and the number of adult war refugees is approximately 1 million people. The indicated figures appear in government information and numerous expert studies (e.g., the Polish Development Fund and the Centre of Migration Research at the University of Warsaw).

The study was representative in nature (random sampling).

The survey questionnaire was developed by the EWL Migration Platform and the Centre for East European

Studies at the University of Warsaw, using some of the questions submitted by the Ministry of Family and Social Policy, the Office for Foreigners and National Security Bureau.

The participants of the study came from all regions of Ukraine, representing different age groups, with different levels of education.

The interviews were conducted with refugees and migrants residing in different cities and regions of Poland, including Warsaw, Krakow, Wrocław, Gdańsk, Poznań, Lublin, Rzeszów, Bydgoszcz, Gorzów, Łomża, Tarnów, Tczew, Opole, Ustroń, Szydłowiec and Wadowice.

In order to comprehensively present the changes occurring in the profile of cross-border employees the current results of the survey were compared with those obtained in the previous edition of the study in December 2021 (N=600).





ANDRZEJ KORKUS

EWL Group Chairman of the Board
CEO of the EWL Foundation

Labour market research has shown that almost 80% of Ukrainian citizens in Poland have taken up employment. With this in mind, it is worth taking a look at the ways in which they are looking for work in our country. As many as 31% of respondents indicate that they found employment by recommendation of friends or through their own efforts. The third largest group are those who used the services of employment agencies – they represent 14% of respondents. In the case of war refugees, this percentage is even higher (16%).

Also noteworthy are the findings regarding the level of education of Ukrainian citizens in Poland. As many as 56% of respondents declare university or incomplete higher education, which in the context of the analysis of the professional potential of Ukrainian citizens is a key factor. Poland, therefore, has a great opportunity to find qualified and trained specialists. It is in the interest of our economy that this group find employment corresponding to their qualifications. Our experience shows that the first step towards this goal is to enable participation in language and vocational courses, and to enable recognition of the acquired diplomas and qualifications.

One of the factors demonstrating the willingness of Ukrainian citizens to integrate into the Polish labour market is the fact that only 1/4 of them considered taking up employment in a country other than Poland. This is more than twice as few than before the outbreak of the war. This fact may suggest the fulfilment of individual expectations of Ukrainian citizens in terms of employment in our country.

The results and conclusions of the research presented in the report are of significance for our labour market. Poland as a country with many years of experience in creating conditions favourable to employment of migrants from the East has managed to cope with the labour activation of war refugees from Ukraine. Fast and effective actions were made possible thanks to, among other things, the decentralisation of aid, as well as the implementation of government programmes of financial support given to organisations and companies. The digitalisation of public services has proven to be a great improvement and real support for activities undertaken by both private and public entities. In turn the introduced deregulation has enabled employers to offer jobs to a total of several hundred thousand refugees.



MARIYA KUZENKO

Operations Director of the EWL
Foundation

It was only a decade ago that the majority of Ukrainian citizens working in Poland were mostly women, employed mainly to do simple work in services and agriculture, as well as in caring for children and the elderly. However, as the Polish economy grew and the Ukrainian economy shrank due to the annexation of Crimea and the partial occupation of the Donbass in 2014, the proportion shifted in favour of men. The outbreak of war in February 2022 caused another sudden change in the aforementioned proportion in favour of women, for which neither Polish employers nor the Polish society were prepared.

Over the past year and a half, there has been a fivefold increase in the number of Ukrainian citizens staying in our country with children. This has turned into a huge challenge for the Polish education and health care systems. Nevertheless, Poland has coped with this situation by providing language learning and development opportunities for all concerned.

Our latest research shows that more than 2/3 of Ukrainian citizens in Poland declare that their children benefit from the Polish education system, of which 38% of respondents combine learning in the Polish education system as well as the Ukrainian one through online learning. Ukrainian parents willingly enrol their children in Polish schools, often due to the need to take up work at that time. Therefore, it is important to guarantee them the possibilities of development, work and childcare at the same time.

According to the study, 60% of respondents declare that they are insured under the Polish social security system. We should add that, according to official data, at the end of 2022 there were almost 750 thousand citizens from Ukraine registered in the ZUS system, 19% more than at the end of 2021.

Currently, 40% of Ukrainian citizens in Poland are considering staying in the country for a longer period, which is a decrease of 1/3 compared to 2021. This is mainly because of the fact that refugees expect a quick return to their homeland. However, it is worth asking a very important question, namely, whether after the end of the war the refugees – mainly women – will return to Ukraine, or conversely will start to invite their family members to Poland, who due to martial law are currently unable to leave the Ukrainian territory.



MARIUSZ KOWALSKI

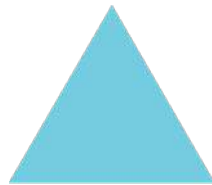
Professor, University of Warsaw,
Polish Academy of Science

The latest report on cross-border mobility presents the results of research on the Ukrainian migrant community in Poland. It is qualitatively a completely new study as it takes into account both labour migration and the effect of war refugees. In addition, the study was carried out one year after the start of full-scale hostilities in Ukraine, so the results obtained represent a relatively stabilised situation, when a significant proportion of refugees have already managed to return to their homeland or have moved to other countries. Despite this stabilisation, there is a significant difference compared with the results of the pre-2022 survey.

One of the major changes was that in the proportion of genders. Previously, there were more men (57%), now

there are more women (69%). An even bigger revolution occurred with the arrival of children. Previously only 11% of Ukrainian citizens stayed in Poland with their children. Now this applies to half of them. At the same time there has been a rejuvenation of migrants, and this is without even taking into account the presence of children. Interestingly, this change was the result not so much of the influx of war refugees, but a rejuvenation of the age structure of pre-war migrants (increase in the share of the 18-25 age bracket from 16% to 27%). It can be guessed that the older the pre-war migrants were, the more willing – despite the war – they were to return to Ukraine. The proportions have also changed when it comes to the regional origin of the migrants. There was an increase in the number of residents of northern Ukraine (including the Kiev, Chernihiv and Sumy areas), understandably due to the main impetus of the initial attacks by the Russians, while the share of residents of the central region decreased (including Dnieper, Poltava, Vinnytsia), which were spared from active hostilities.

The change in the situation in Ukraine has very clearly transformed the profile of the Ukrainian community in Poland. This undoubtedly creates new challenges for Poland, both in terms of the labour market and the education system. It is also a new experience for the Ukrainian citizens in Poland who have been presented with new realities and problems to be solved.



TENT

PAULINA JAWORSKA

Country Director – Poland,
Tent Partnership for Refugees*

The Tent Partnership for Refugees was launched in 2016 by Hamdi Ulukaya, the CEO and founder of Chobani – a multibillion dollar food company in the U.S. – to mobilize global businesses to help connect refugees to work. Today, Tent is a network of over 300 major companies committed to hiring, training, and mentoring refugees, and Poland is one of its key countries of focus.

Poland has welcomed more Ukrainian refugees than any other country in Europe, many of whom are women with higher education degrees or professional expertise.

Despite this, as surveys including this latest one from EWL show, a large number remain unemployed.

Ukrainians face numerous hurdles when trying to find work – including language barriers, lack of social or professional networks, limited understanding of the local job market, and childcare burdens. Businesses have a critical role to play to help refugees overcome these barriers. Tent supports and advises large companies in Poland and across Europe along every stage of their refugee hiring and integration efforts.

With more urgency than ever for companies to do more, Tent recently announced a summit bringing together leading businesses to accelerate the economic integration of Ukrainian refugee women and other refugees in Europe. Taking place in Paris on 19 June, on the eve of World Refugee Day, the Tent European Business Summit will feature major companies announcing bold corporate pledges to hire and train tens of thousands of refugees. Dozens of companies are expected to announce commitments, and we welcome more Polish businesses to join us.

** EWL has been a member of Tent since 2023.*



EWL MIGRATION PLATFORM

One of the fastest growing companies in the employment sector in the EU, which successfully connects candidates from five continents (Europe, Asia, Africa, North and South America) with European employers. The company is gradually increasing the number of countries from which job candidates come, and is implementing technological solutions that aim to further digitalise the recruitment, employment legalisation and accommodation of employees.

Since its founding in 2007, the company has helped more than 150,000 people from 28 countries to find employment with more than 1.6 thousand employers in EU countries.

As a global migration platform, EWL uses dedicated AI technology in its operations, which quickly and effectively matches candidates with employers, taking

into account the skills and experience of potential employees.

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

EWL is guided by the values of: openness, cooperation and responsibility, being fair, challenging the status quo and customer focus. The company's mission is to structure issues related to global mobility by eliminating the barriers facing millions of candidates around the world, to connect jobseekers with the best employers and to provide a transparent employment process.

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.

Following the start of the Russian invasion of Ukraine, the Foundation in cooperation with EWL clients and volunteers initiated a number of aid activities, including the „Backpack to Ukraine” campaign (120 transports of humanitarian aid) or the Mother and Child Point at Warsaw's Zachodni Railway Station, where over 75 000 refugees have found shelter, rest and first aid.



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.

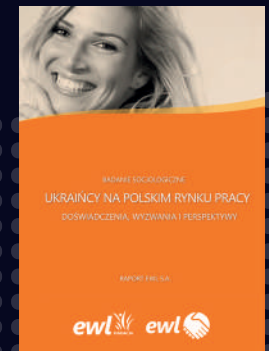
The Centre annually organizes international scientific conferences and a series of events building positive relations between Poland and the countries of the



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 AND THE CENTRE FOR EAST EUROPEAN STUDIES UW REPORTS (2018–2023)



Report On Cross-border Mobility 'Citizens of Ukraine on the Polish labour market. New challenges and perspectives'. A study by EWL and the Centre for East European Studies at the University of Warsaw

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