



NARODOWY  
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# The living and economic situation of Ukrainian refugees in Poland

## Report of the questionnaire survey conducted by NBP Regional Branches



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of Ukrainian refugees in Poland**  
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## Summary of key findings

The outbreak of war in Ukraine on 24 February 2022 resulted in an unexpected and sudden inflow of war refugees. Poland is the country where the largest number of refugees stayed and will continue to stay. In order to determine who the immigrants are, what their needs are, what their plans are and what their future might be in the Polish labour market, in April and May this year Narodowy Bank Polski conducted a survey among Ukrainian citizens who arrived in Poland as refugees after the outbreak of war. The results of this survey, presented in more detail later in this report, indicate that:

- Refugees arriving in Poland represented all regions of Ukraine; however, an above-average number of people came from war zones relatively well interconnected with Poland (Kyiv region and the surrounding area). Approximately 13% of refugees entered Poland across a border other than the border with Ukraine.
- At the end of April and the beginning of May, approximately 1.5 million refugees from Ukraine were staying in Poland.
- Refugees from Ukraine are mainly women, more than 60% of whom arrived together with their children, usually with one or two. Almost 24% of the women arrived alone and these are mainly women under 29 and over 60.
- 50% of refugees have a university degree, which significantly exceeds the share of people with a university degree in the Ukrainian population as a whole. Therefore, one of the challenges we face is to help them find a satisfactory job.
- Refugees from Ukraine are very active on the labour market – about 30% of them have already worked or had a job arranged, and approximately 50% of them are searching for a job, very often on a part-time basis due to taking care of children.
- Despite the high levels of earlier labour migration to Poland, more than 50% of the refugees who currently reside in Poland have not previously been to Poland or had contact with people who visited our country. A considerable part of the refugees (46%) did not speak Polish.
- In terms of potential integration of refugees in Polish society and in the labour market, the situation may be particularly difficult in regions of Poland where a relatively large number of refugees without previous contact with our country and language arrived (e.g. Świętokrzyskie, Podlaskie and Warmińsko-Mazurskie Voivodeships).
- The main form of assistance indicated by the refugees was providing them with accommodation, where, in addition to the government, local authorities and Polish families, they are also supported considerably by compatriots already living in Poland. The results of the survey indicate that about one-third of the refugees paid for rent with their own funds.
- A relatively large group of refugees declared that they did not benefit from assistance other than accommodation (43%). Around one-third of the refugees also had means of subsistence for more than three months.
- Among the assistance measures that would make it easier for them to continue their stay in Poland, refugees mainly mentioned the organisation of Polish language courses, assistance in finding a job quickly and aid in gaining access to health care.

- Approximately 30% of refugees residing in Poland provide in-kind or financial assistance to family or humanitarian organisations in Ukraine. This is particularly common among refugees who have a job (44%).
- In questions related to their possible further stay in Poland, two-thirds of refugees declare that their stay in Poland is temporary (less than a year). Men and young people are most interested in staying permanently in Poland. Women, especially single women with children, are much more likely to think about returning to Ukraine. In the event of a rapid end of the war, some of those who were considering a longer stay in Poland would most likely revise their plans and return to the country much sooner.
- The desire to return to Ukraine within a year is also more often declared by people with a university degree who may find it difficult to find a rewarding job in Poland in their profession which ensures the ability to support themselves and their family. People working in the healthcare sector in Ukraine are more likely to consider staying in Poland permanently, while those previously involved in agriculture are less likely to do so. Obviously, people who already have a job are more likely to think about staying in Poland than those who are still searching for a job.
- For refugees, not only financial independence is of great importance, but generally the possibility to become independent quickly in Poland, also understood as the ability to rent an independent dwelling. This could be difficult, considering current rental prices and the lack of an adequate pool of rental housing especially in large cities.
- A small percentage of refugees – only approx. 5% – want to leave Poland to live in another country. It seems that those who had such an intention had already fulfilled it before the survey started (April/May 2022). Currently, such declarations are often made by people who left Ukraine alone. It is also common for people who used to work in the IT sector in Ukraine to think about moving further west. The interviewers met a relatively high number of people in Rzeszów who were planning to continue their travel, which may suggest that those willing to continue their travel to the West had already precise plans for further travel upon entering Poland.

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# Introduction

The outbreak of the war in Ukraine on 24 February 2022 resulted in an unexpected and sudden inflow of war refugees to Poland. Since then, the highest number of refugees related to the conflict have passed through our country. Past experience shows that war-forced migration is quite different from labour migration, which has been mostly observed in Poland so far. As a result of the Russian aggression against Ukraine in 2014, the deep economic crisis in Ukraine and the rise in unemployment, mainly economic migrants flowed into Poland. Over recent months, refugees have been arriving from the areas involved in the fighting or those at risk of conflict, and the war has caused and continues to cause many casualties. It is therefore a forced migration. This migration movement is a factor that completely changes the reality of the labour market in Poland, yet it is also a major challenge from the point of view of public statistics. In order to determine who the immigrants are, what their needs are, what their plans are and what their future may be on the Polish labour market, Narodowy Bank Polski conducted a survey in April and May this year among Ukrainian citizens who have arrived in Poland since 24 February 2022.

The survey was conducted between 13 April 2022 and 12 May 2022 by NBP Regional Branches on a sample of 3,165 adult refugees from Ukraine (persons who arrived in Poland after 24 February 2022). The survey was conducted using questionnaires in Ukrainian, Polish and Russian. The sample largely comprised people met in offices and places of collective accommodation in 16 voivodeship capital cities. In order to ensure representativeness, the results were weighted so that the proportions of the distribution of immigrants by county and by age and gender were consistent with the available data from the PESEL register.

The authors of the report would like to thank the staff of the Regional Branches of Narodowy Bank Polski for the excellent performance of the survey following the instructions at this particularly difficult moment in history.

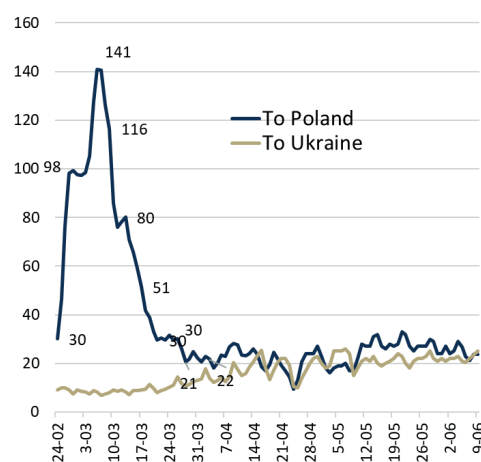
# 1. Socio-demographic characteristics of the refugees

The survey conducted by the NBP Regional Branches included questions on the socio-demographic characteristics of the respondents (age, gender, education, etc.) and questions regarding their place of residence before Russia's aggression against Ukraine or the direction from which the refugees entered Poland. This information is crucial due to the lack of statistics concerning border traffic with Schengen countries. This chapter presents information related to the arrival of the immigrants in Poland, their place of origin, the basic characteristics of refugees coming to Poland and any previous experience of the refugees facilitating their current stay in Poland.

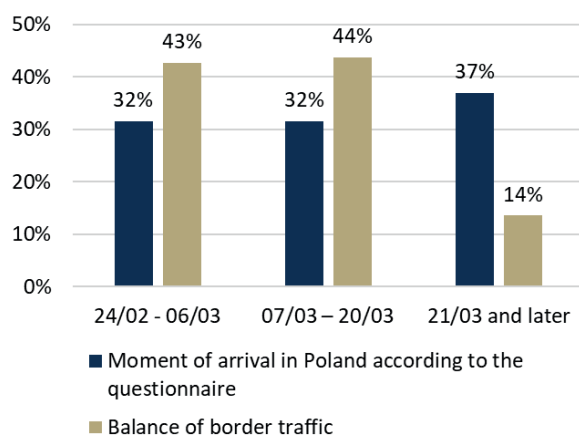
## 1.1. When and from where did the refugees arrive?

The Border Guard data indicate that from the first day of the war in Ukraine until the beginning of April, increased arrivals of Ukrainian citizens to Poland were recorded (**Figure 1**). In the following weeks, the inflows and outflows across the border with Ukraine were more balanced, but still at elevated levels. At the beginning of May 2022, a tentative trend of higher rates of returns to Ukraine than arrivals appeared (subsequently, this trend started to dominate). Therefore, the main wave of refugee emigration occurred between the end of February and the beginning of April this year. The high border traffic only partially translated into the number of refugees remaining in Poland. This was associated with the departure of some refugees to other countries (mainly to other EU countries). Border traffic data do not allow to determine the length of stay of individual persons. Women arriving from Ukraine often travelled back to their home country to return to Poland again. It can be estimated that approximately 1.5 million women and children were staying in Poland during the survey period.

**Figure 1. Traffic on the border with Ukraine (daily, in thousands)**



**Figure 2. Structure of refugees according to the date of last arrival in Poland (survey data)**



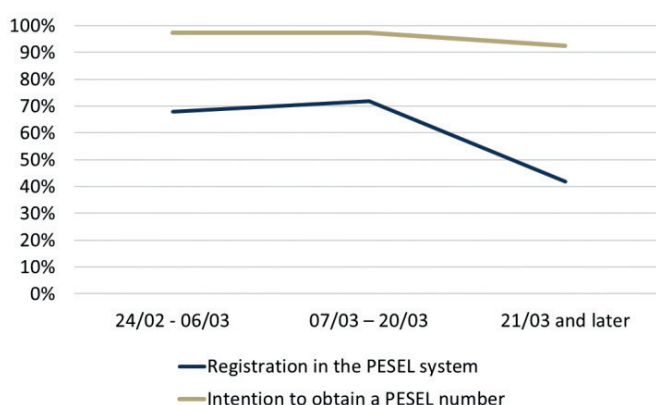


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Compared to the balance of migration recorded in the border traffic, the structure of people staying in Poland according to the date of arrival is better reflected by the completed sample, containing a lower percentage of people who had stayed in Poland continuously since the first weeks after the invasion. On the other hand, the share of people who declared that they had arrived the last time after 21 March 2022 was higher (**Figure 2**).

The majority of adult respondents (**Figure 3**) were either already registered in the PESEL system (approximately 70%) or wanted to register (approximately an additional 25%). Only less than 5% were not registered and did not want to register. Interest in obtaining a PESEL number remained high, at a level of 97% among those residing in Poland continuously for a longer time and 92% among those staying for shorter periods. Approximately 70% of refugees who had arrived before 20 March had obtained a PESEL number. This share was slightly higher among persons surveyed outside offices and immigration registration sites (approximately 80%). Among persons who had arrived in Poland after 20 March, the share of those registered in the PESEL database was lower (approximately 40%), which was related to the relatively short period of their stay in Poland.

**Figure 3. Declared intention to register in the PESEL database vs. actual registration according to the date of arrival**



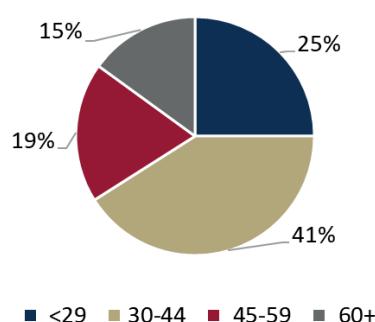
Thus, the survey results do not indicate why not all immigrants who declared that they were interested in obtaining a PESEL number did not obtain one. Obviously, it takes some time to register one's stay, however, the survey was conducted at a time when the number-issuing system was already fully operational and there were no objective obstacles to obtain it. Despite that, there is a large group of people residing in Poland without such registration.

## 1.2. Basic characteristics of respondents

Russia's attack on Ukraine on 24 February this year resulted in an inflow of refugees from Ukraine to Europe, mainly to Poland. The opening of Poland's borders with Ukraine to the flow of refugees and the decree of the President of Ukraine which, in connection with the announcement of general mobilisation, banned men aged 18-60 from leaving the country, had a fundamental impact on the

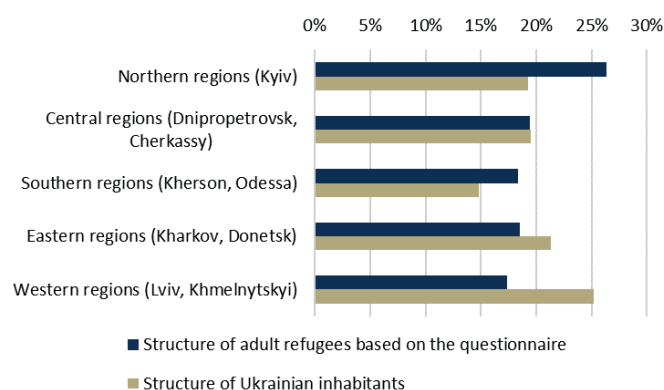
characteristics and scale of the refugee wave. It only introduced a few exceptions to this rule, such as allowing fathers of at least three children under the age of 18 to leave. Therefore, the adult refugees are predominantly women – almost 90 per cent of all respondents. Describing the people arriving by age, it can be seen that the largest group among them were those aged 30-44, i.e. people in the so-called prime-age – the age of the highest economic activity and setting up a family (Figure 4). These people mostly came with their children. The refugees also show a relatively high share of older people (60+) who would not choose to migrate under normal circumstances.

**Figure 4. Ukrainian refugees according to age (individuals over 18)**



As the survey showed, the refugees came to Poland from all the regions of Ukraine.<sup>1</sup> The largest number (26% of people) came from northern Ukraine, which includes among others Kyiv, the largest city in Ukraine with a population of over 3 million. When considering the number of refugees in relation to the population of individual regions of Ukraine before the war, it should be noted that many refugees also came from southern Ukraine. Relatively fewer – from eastern and western Ukraine (Figure 5).

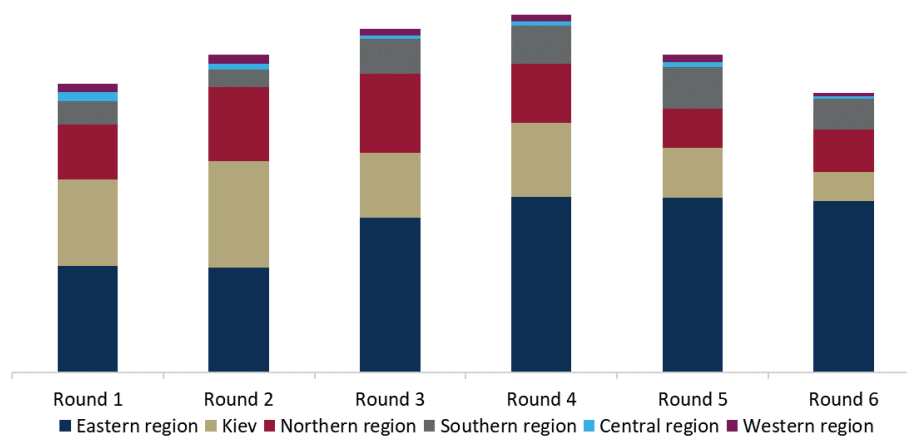
**Figure 5. Regions of Ukraine where refugees lived before coming to Poland and the population structure of these areas in 2018**



<sup>1</sup> For the purpose of the study, the division of Ukraine into 5 regions, adopted in the legislation in force in Ukraine on regional policy, was used: northern region (oblasts of: Sumy, Zhytomyr, Chernihiv, Kyiv, Kyiv city), central region (oblasts of: Dnipropetrovsk, Poltava, Cherkassy, Vinnytsia, Kirovohrad), southern region (oblasts of: Odessa, Mykolaiv, Kherson, Zaporizhia, Crimea), eastern region (oblasts of: Kharkov, Luhansk, Donetsk); western region (oblasts of: Volyn, Rivne, Lviv, Khmelnytskyi, Ivano-Frankivsk, Ternopil, Zakarpattia, Chernivtsi).

A study conducted by the International Organisation for Migration (IOM UN) provides some guidance concerning the behaviour of Ukrainian citizens in the face of war. A telephone survey of internally displaced persons in Ukraine was conducted 6 times between 16 March and 23 June this year. According to IOM estimates, since the outbreak of the war, 8 million people have been forced to leave their place of residence and move to other places in Ukraine (**Figure 6**). However, the share of internally resettled persons differs from the share of those who arrived in Poland. The highest number of internally displaced people comes from eastern Ukraine and northern Ukraine including Kyiv. According to the results of the survey, factors such as having family or friends to provide shelter, an assessment of whether a place was safe or finally, lack of choice – the particular area was the only possible place to evacuate – were the most common factors in choosing the evacuation site. The highest number of internally displaced persons comes from eastern Ukraine and this region is also often chosen as a resettlement site.

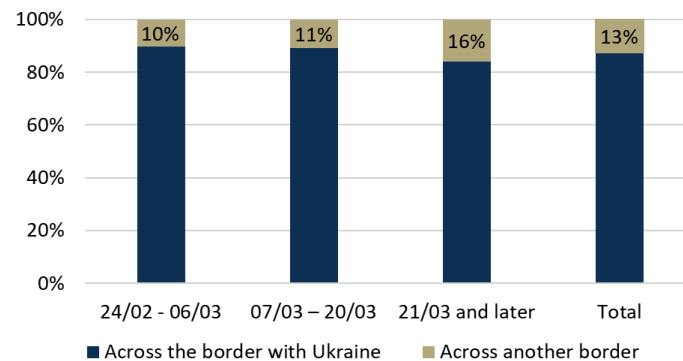
**Figure 6. Structure of internally displaced persons in Ukraine according to region of origin**



Source: International Organisation for Migration (IOM), *Ukraine Internal Displacement Report, Round 6, 23 June 2022, Own study.*

Most of the refugees interviewed arrived in Poland by crossing the Polish-Ukrainian border. However, more than 13% of refugees arrived in Poland via other countries (**Figure 7**). Refugees from southern Ukraine were most likely to indicate this method of arrival in Poland. This can be explained primarily by the proximity of the borders with other countries and the long queues at the Polish-Ukrainian border, which made it necessary to wait several days before entering Poland. It is worth noting that the percentage of people arriving from other directions (e.g. after previous stays in other EU countries such as Hungary, the Czech Republic or Slovakia) increased among immigrants who came to Poland later (from 10% to 16%), which could be related to the relatively more favourable conditions offered by Poland compared to other countries.

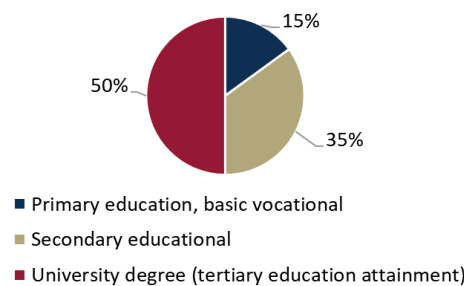
**Figure 7. Percentage of refugees arriving in Poland across the border of Poland with Ukraine and across other countries**



### Education of refugees

Approximately 50% of refugees declared that they had a university education (**Figure 8**). Meanwhile, according to the data of the State Statistical Service of Ukraine, in 2021, 30% of Ukrainians over 25 had an education equal to at least Poland's university bachelor's degree.<sup>2</sup> Among women, this rate reached 30.7%. This means that a largely better-educated part of the Ukrainian society came to Poland.

**Figure 8. Ukrainian refugees according to the level of education**



University education was most commonly declared by persons aged 30-44 (60% of people in this group), however, the rate was also high in other age groups. The lowest number of persons with primary/vocational education (9%) was reported in the age group of 30-44 (9%).

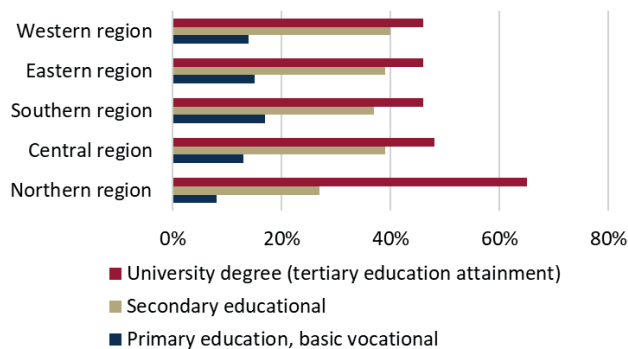
Their place of residence in Ukraine before the war was of some importance in terms of the refugees' education (

**Figure 9**). The declarations regarding university education were most frequent among refugees from northern Ukraine, while primary/vocational education was the least frequent, which may be

<sup>2</sup> Socio-demographic characteristics of Ukrainian households in 2021 (Socio-economic situation of Ukrainian households according to a sample survey of living conditions of households), State Statistics Service of Ukraine (ukrstat.gov.ua)

related to the fact that Kyiv is one of the economic centres of Ukraine and home to numerous universities.

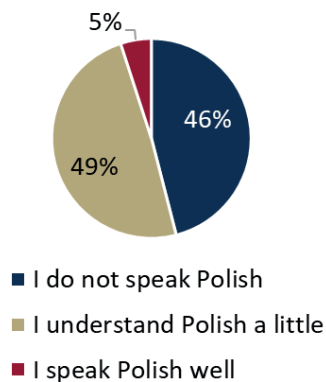
**Figure 9. Place of residence in Ukraine and education of refugees**



### Language skills among refugees

Approximately 49% of respondents assessed that they slightly understood Polish and were able to communicate, although with difficulty. 5% declared a good knowledge of Polish (**Figure 10**).

**Figure 10. Knowledge of Polish among refugees**



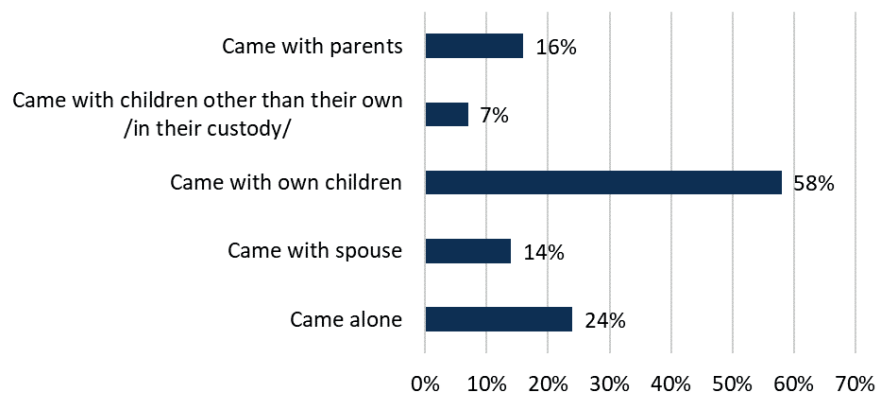
A better knowledge of Polish is declared by younger people and by refugees who have had previous experience with Poland. Knowledge of Polish is also correlated with the place of residence in Ukraine and therefore the distance of the refugees to Poland. More often, a good knowledge of Polish is declared by people from western Ukraine (15%). Least frequently – from eastern Ukraine (2%).

A knowledge of English or another Western European language was declared by 27% of respondents. Refugees from northern Ukraine, among others from Kyiv, indicated their foreign language skills most frequently.

## Refugee families

Refugees in most cases came to Poland in the company of others, primarily their own children or other people's children under their care (Figure 11). Most of those who came to Poland with children were accompanied by one or two children. However, it should be noted that 24% of refugees arrived alone.

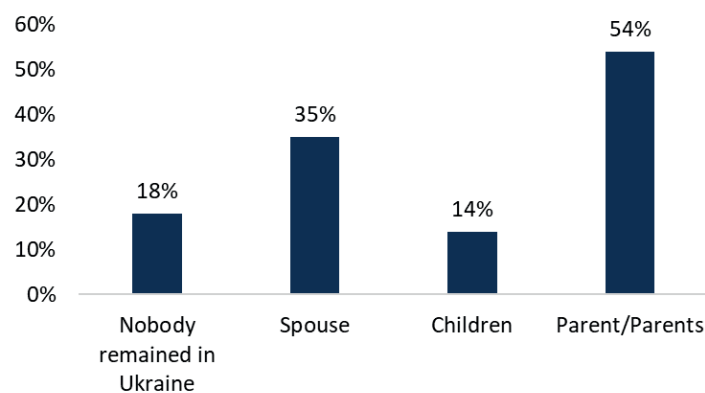
**Figure 11. Did other family members come with you to Poland after the war broke out? (it was possible to indicate more than one answer )**



The mode of travel – accompanied by others or alone – varied depending on the age of the respondents. The highest number of single arrivals was recorded among refugees under 29 and over 60. Persons over 60 were more likely to arrive with their spouses than younger people, which probably resulted from the restrictions on younger men crossing the border in force in Ukraine. More than 80% of those aged 30-44 came with children.

The refugees left their close relatives in Ukraine, mainly their parents. In the case of 18% of respondents, nobody remained in Ukraine (Figure 12).

**Figure 12. Did any of the refugee's close relatives remain in Ukraine? (it was possible to indicate more than one answer )**



The analysis of these data by age group shows trends that are natural in terms of age. With the increasing age of a refugee, the number of indications of parents as the closest relatives who

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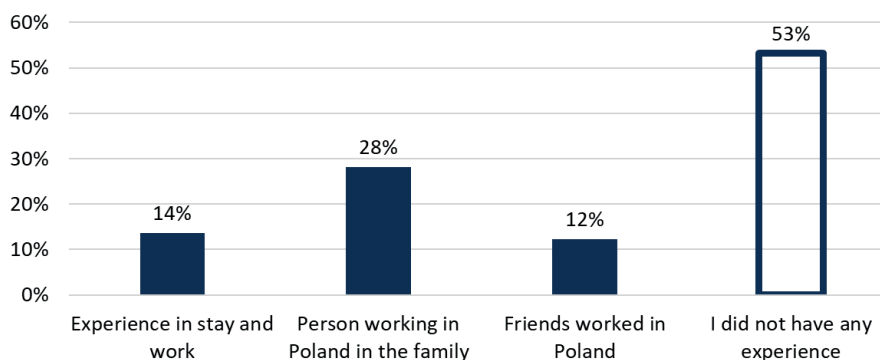
remained in Ukraine decreases and the number of children increases. However, at the same time, the data show that people over 60 most often indicated that none of their closest relatives had remained in Ukraine, which can be explained to a significant extent by coming to Poland with their children or their spouse. The maximum frequency of indications concerning leaving a spouse in Ukraine occurred in the case of persons aged 30-44 (46%).

When analysing the information on the family situation of refugees from the point of view of their further stay in Poland, it should be noted that among refugees there was a large group of people whose closest family (e.g. minor children, a spouse) stays with them in Poland or who are simply alone. The group of people who left some of their close family in Ukraine is not predominant. Thus, perhaps it is not family ties that will be the main factor driving them to return to Ukraine. Some clues in this respect are also provided by the answer to the question concerning the factors that would be critical in deciding to stay in Poland for a longer time. Among respondents considering such an option, the majority of indications related to finding a satisfying job and sustaining themselves and their families. Fewer people indicated re-joining family or the position of children.

### 1.3. Refugees' earlier experience associated with staying in Poland

Earlier experience or migration networks could help refugees in getting familiar with Poland. However, the survey data show that the majority of people arriving in Poland had not visited the country before or had no information about Poland. Only about 14% had previously worked in Poland and were staying in Ukraine when the war broke out (**Figure 13**). On the other hand, for approx. 28%, migration to Poland was not new, since they had people in their family who used to work in Poland and were able to pass on some information concerning our country. In turn, approximately 12% of refugees declared that their friends had previously stayed in Poland. Nevertheless, an important fact is that for more than 50% of the refugees who came to Poland displaced by the war, it was a completely new experience, unknown from both personal experiences and from the accounts of relatives and friends.

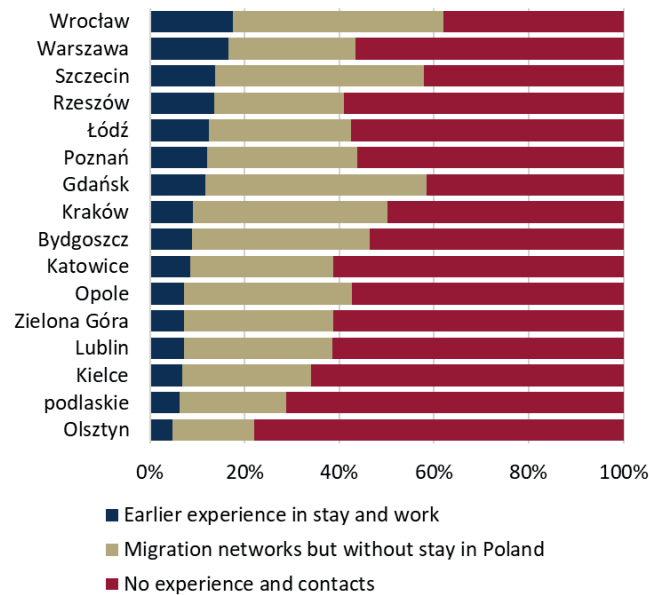
**Figure 13. Structure of answers to questions about the experience associated with staying in Poland**



The questionnaire survey was carried out on a relatively large sample, which makes it possible to analyse the diversity in refugee responses in various regions of Poland. Earlier experience and developed networks of contacts (information or assistance of people who had previously stayed or worked in Poland (family, friends)) were the factors influencing migration to specific locations in

Poland. On the other hand, the diversification of refugees according to their knowledge of the realities of life in Poland indicates in which regions the integration of incoming refugees into the labour market can be particularly challenging.

**Figure 14. Diversification of experience and knowledge concerning migration to Poland according to regions**



The results of the survey (**Figure 14**) indicate that the majority of refugees had no previous experience of coming to Poland and had no previous contacts with their family or any other persons coming to Poland (so-called migration networks). However, the results are very diversified. On the one hand, among refugees arriving in the Zachodniopomorskie or Dolnośląskie Voivodeships, there were relatively more immigrants who had already come to Poland before or had a network of contacts. At the same time, the percentage of refugees without any contacts and previous knowledge was quite low. On the other hand, in voivodeships such as Warmińsko-Mazurskie, Podlaskie or Świętokrzyskie, the percentage of refugees who did not have such previous experience or contacts was exceptionally high. It is also worth noting that in some voivodeships the incoming refugees were quite polarised – in the Podkarpackie, Mazowieckie, Łódzkie and Wielkopolskie Voivodeships both people with their own experience of migration to Poland and people with no experience at all stayed relatively more often. On the other hand, the Pomorskie and Zachodniopomorskie Voivodeships were more likely to host people without their own migration experience but able to draw on the experience and contacts of family networks or friends.



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## 2. The economic situation of refugees in Poland

The labour market situation of refugees at present and in the future is one of the most important research topics related to the influx of refugees and at the same time it evades the patterns known from warfare in the past (in Syria, Chechnya or the former Yugoslavia). On the one hand, past war refugees (forced migrants rather than economic migrants) were significantly less likely to engage in professional activity than voluntary migrants. Refugee status also provides protection for such persons precisely because of their potential problems on the labour market. Additionally, refugees in Poland are mainly women with children, who will find it more difficult to undertake work. On the other hand, the declarations of people coming to Poland clearly indicate that they are interested in working even if their current stay is temporary. Some refugees also know the realities of the Polish labour market from their own experience or through their migration networks (family, friends previously working in Poland).

### 2.1. Current status on the labour market

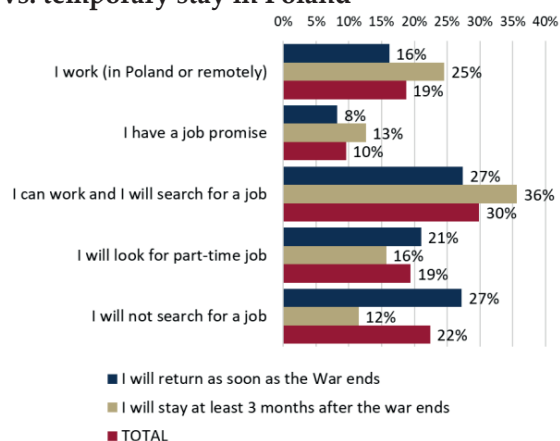
Survey data indicate that refugees declared a relatively high interest in being active in the labour market (**Figure 15**). Approximately 19% had already worked in Poland while another 10% were promised a job in Poland. In assessing this indicator, it should be noted that these individuals had the opportunity to search for work for a maximum of two full months and most of them had no previous experience of working in Poland (see **Figure 13**). Moreover, despite the fact that about 60% of refugees came with their own children, on average, only 22% declared that they would not search for work in Poland. Obviously, the responses were affected by respondents' plans declared elsewhere in the questionnaire survey. Among persons declaring that the fact of the end of hostilities would not make them want to return to Ukraine immediately, the percentage of those who had already found a job amounted to 25% and the percentage of those who had been promised a job reached an additional 13%. For obvious reasons, persons treating immigration to Poland as a transitional state (declared return to Ukraine within 3 months after the end of the war) were less involved in the labour market. These people were also clearly more likely to declare that they would not search for a job in Poland (27%).

The remaining part of the immigrants (almost 50% of the total) declare searching for a job, with about 30% looking for a full-time job and less than 20% for a part-time job due to the need to take care of the family. Searching for full-time work is clearly more often declared by persons who do not plan to return to their home country soon (36% compared to 27% of those treating their stay as temporary). On the other hand, the option of searching for part-time work was more often chosen by persons planning a fast return to Ukraine.

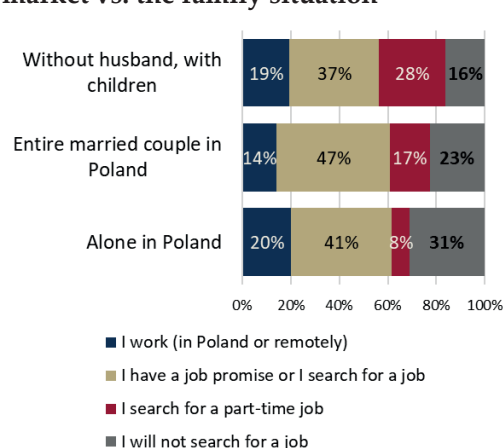
The analysis of occupational activity depending on the family situation in Poland (**Figure 16**) shows that staying in Poland without a husband and with children (the relatively most frequently declared type of family situation) was not at all associated with low labour market activity. On the contrary, 19% of women in this situation were already working and 37% had a promised job or

searched for a full-time job, which was close to the rates for all refugees. On the other hand, a distinctive feature of the group was also the fact that 28% of people were looking for part-time work due to family duties and the exceptionally low percentage of declared lack of interest in activity on the labour market. Therefore, it can be said that mothers with children coming to Poland are particularly interested in finding a livelihood independent of external aid.

**Figure 15. Activity on the Polish labour market vs. temporary stay in Poland**



**Figure 16. Activity on the Polish labour market vs. the family situation**



Most often, the lack of interest in searching for a job was declared by those who are alone in Poland (over 30%), which may be associated with their perception of their stay in Poland as temporary and their relatively lower life needs. However, even for these people, approximately 20% already work in Poland and another almost 50% will search for work in Poland. An interesting category comprises people who reunited with their families in Poland after the outbreak of war. Women with such a family situation arriving from Ukraine were relatively less likely to be working (14%), but at the same time clearly more likely to declare that they were searching for a job. This may result from the relatively secure current income situation, but at the same time, the need to provide for alternative income in the future, prompting a slightly longer search for better-fitting job offers.

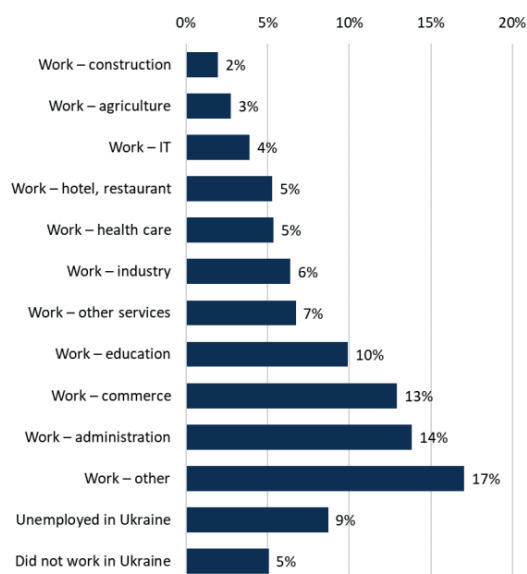
## 2.2. Labour market activity in Ukraine before migration to Poland

The opportunities and the place of immigrants in the Polish labour market largely depend on what their professional activity in Ukraine was and the professions they performed. For example, a woman arriving from Ukraine with experience of working in commerce may not be able, despite her best intentions, to replace a man returning to Ukraine employed in Poland in the construction sector.

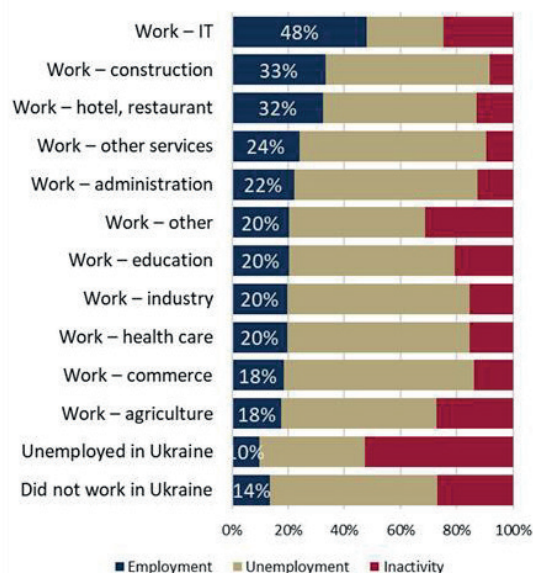
The vast majority of refugees arriving in Poland are well-educated women. The results of the questionnaire survey indicate (Figure 17) that only 2-3% had previously worked in Ukraine in sectors such as construction or agriculture. Slightly more used to work in professions requiring higher qualifications (e.g. administration – 14%), especially those that are relatively easy to use on the Polish labour market (IT – approx. 4%, healthcare – more than 5%, education – 10%). A

considerable part of refugees also worked in sectors with continued demand for labour in Poland at the beginning of 2022 (industry, hotels and restaurants, personal services).

**Figure 17. Labour market status in Ukraine**



**Figure 18. Labour market status in Ukraine compared to occupational activity in Poland**

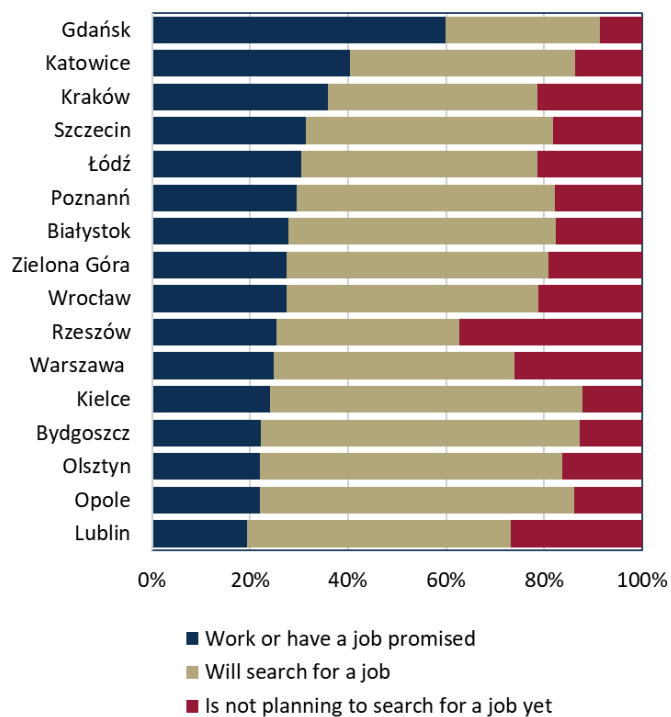


The labour market opportunities for Ukrainian refugees are enhanced by the fact that the majority of arrivals are at working age, the vast majority of them worked or searched for work in Ukraine (**Figure 17**). Only approx. 5% were not economically active (no job and no search for work) and approx. 9% could be considered unemployed and therefore searching for work.

On the other hand, a comparison of the labour market situation in Ukraine and the declaration of professional activity in Poland (**Figure 18**) shows that refugees previously working in IT (48%), construction (33%) and hotels and restaurants (32% of people working) were relatively most likely to find a job in Poland. Employment in other sectors in Ukraine did not make a clear difference to employment opportunities in Poland – they amounted to approx. 20%. Persons economically inactive in Ukraine were less likely to be employed (14%). Refugees who had unsuccessfully searched for work in Ukraine before leaving were least connected to the labour market in Poland and most inactive (approx. 10% of them found a job in Poland).

Plans to take up employment in Poland vary significantly among refugees in different regions of Poland (**Figure 19**). The relatively highest percentage of immigrants already had a job or a promise of a job in the Pomorskie Voivodeship (60%). This was followed by the Śląskie, Małopolskie and Zachodniopomorskie voivodeships. On the other hand, the smallest percentage of immigrants worked or were promised a job in Lubelskie (approx. 20%), Opolskie and Warmińsko-Mazurskie voivodeships.

Figure 19. Diversification of immigrant labour market situation according to regions



The highest percentages of refugees not interested in activity in the labour market were observed in regions in Poland perceived as a gateway to further migration or a place to wait until they return to Ukraine, i.e. in the vicinity of Lublin, Rzeszów and Warsaw.

### 3. Assistance to and from refugees

Immediately upon arrival in Poland, refugees were assisted primarily in the scope of accommodation, but also food, transport and basic information needed during their stay in Poland.

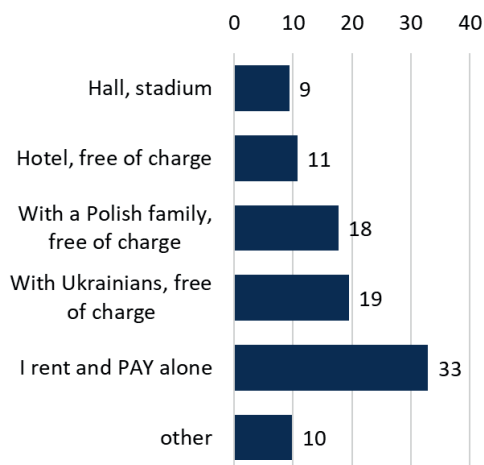
#### 3.1. Assistance already provided to Ukrainian refugees in Poland

The mode of accommodation of the immigrants interviewed was diversified (**Figure 20**) and, despite the very short period of time, arranged in such a way that relatively few people arriving in Poland were forced to use adapted collective accommodation (stadiums, halls).

The questionnaire survey results indicate that the number of refugees using this type of accommodation was lower than 10%. Places at hotels, hostels, shelters, etc., paid for by the state or local authorities (11%) and living with families in Poland (18%) were forms of free assistance in accommodation indicated more often. Approximately 20% of Ukrainian refugees were also taken under their roofs by Ukrainian citizens already residing in Poland. Indeed, already before the war, approximately 1.5 million economic immigrants were staying on the territory of Poland.

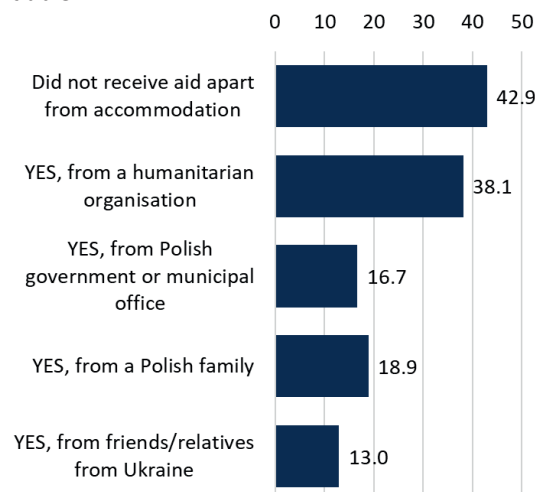
It is also unprecedented in terms of refugee crises that around one-third of the refugees did not need help with their accommodation since they paid their own rent. On the other hand, approx. 10 per cent of refugees indicated an accommodation option other than the one mentioned in the survey.

**Figure 20. Accommodation of refugees in Poland\***



\*one answer could be selected, frequencies add up to 100

**Figure 21. Assistance apart from accommodation**



\*multiple answers could be selected, frequencies do not add up to 100

In addition to accommodation assistance, other types of assistance related to food, health care, childcare, etc. proved to be important. Around 30% of refugees declared that they had savings, while 43% of respondents declared that they did not use any other types of assistance apart from accommodation (**Figure 21**). When doing so, refugees most frequently cited such assistance provided by humanitarian organisations (38%). This was followed by non-residential assistance

provided by authorities (17%), Polish families (19%). On the other hand, such assistance provided by other Ukrainian nationals was indicated least frequently, which may result from the difficult situation of the entire diaspora of Ukrainian immigrants in Poland.

### 3.2. Refugees' opinions on expected forms of assistance

Among the assistance measures that would make it easier for them to continue their stay in Poland, refugees mainly mentioned the organisation of Polish language courses, assistance in finding a job quickly and aid in gaining access to health care (Figure 22).

**Figure 22. What would be the most important forms of assistance to refugees, facilitating their stay in Poland (respondents were asked to tick three most important responses)?**

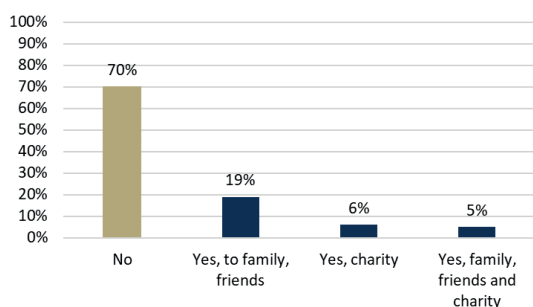


Naturally, this hierarchy of needs varies depending on the age of the respondents. People over 60 were more likely than other age groups to consider support measures such as access to health services, better information on how to deal with the authorities and financial support as important and necessary. They were less likely to expect assistance in learning Polish, which may indicate that they associate their future with Poland to a lesser extent. The youngest age group, on the other hand, was more likely to indicate opportunities to learn Polish, assistance in the recognition of diplomas and in the organisation of training courses for specialised jobs in Poland, i.e. activities that would indicate a search for a way to find their place in Poland.

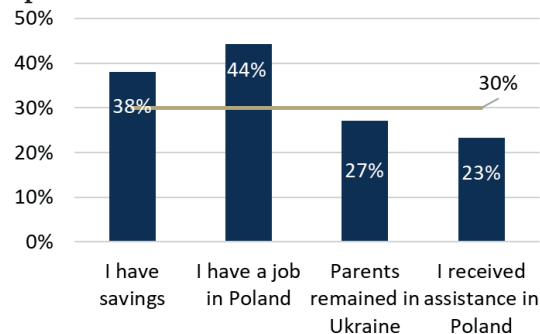
### 3.3. Transfers from refugees to Ukraine

Refugees arriving in Poland not only received assistance, but also transferred money in order to support their families and provide humanitarian aid on the Ukrainian territory. The results of the survey indicate (Figure 23), that 19% of refugees provided assistance in cash or in kind to their families in Ukraine, 7% provided support to charitable institutions operating in Ukraine, and 5% to both their families and charitable organisations. Altogether, approximately 30% of refugees supported their compatriots remaining in Ukraine.

**Figure 23. Assistance provided by refugees to others in Ukraine**



**Figure 24. Percentages of refugees donating aid to Ukraine in selected groups of respondents**



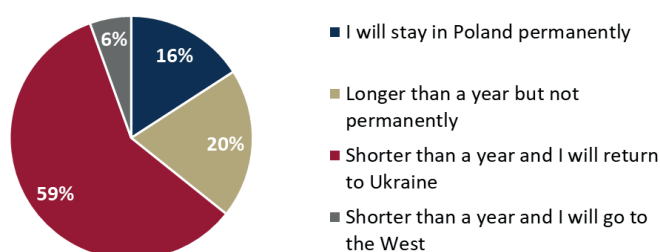
The frequency of assistance provided by refugees depends to a large extent on their occupational situation in Poland (**Figure 24**). Out of the refugees who found a job in Poland, 44% sent funds or in-kind contributions to Ukraine. Their overall financial situation was also of great importance. Among approximately 30% of refugees who declared that they had the means to survive in Poland for three months, 38% of people transferred aid to their home country. On the contrary, those receiving aid in Poland were themselves in such a difficult situation that they were much less likely (23%) to be able to transfer aid to their relatives in Ukraine. A similar situation occurred in the case of assistance related to the family remaining in Ukraine – approx. 27% of refugees declaring that their parents had stayed in Ukraine transferred their aid there.

## 4. Further plans of refugees

Decisions made by refugees concerning the length of their stay in Poland will largely depend on the further course of the war, the intensity of hostilities and the potential spillover of the conflict into other parts of the country. However, besides the war itself, there are a number of factors that could affect their future plans. Moreover, various statistics show that a considerable part of refugees are not waiting for the end of the war, but have already started to implement their plans to leave Poland, and these are departures in two directions – return to Ukraine and departure in search of a safe place to live and work in other European countries. Declarations regarding their further planned stay in Poland, although they are submitted under the conditions of high uncertainty, are worth a more detailed analysis, which would give an idea of what scale of displacement we may have to deal with in the near future. Equally importantly, they provide an insight into the kind of people, in terms of demographic and economic characteristics, who are more likely to stay in Poland longer and who are considering their return to Ukraine or move to another country.

According to the results obtained (**Figure 25**), as many as two-thirds of the respondents – 64%, assume that their stay in Poland will not last longer than a year. At the same time, 59% plan to return to Ukraine and 5% want to leave Poland and travel to the west. 16% of refugees have decided to stay permanently in Poland. Another 20% are considering a longer stay in Poland, but do not plan to stay here permanently.

**Figure 25. How long do you think your stay in Poland will last?**



In relation to the results obtained, the high percentage of people who want to stay in Poland for longer or permanently seems important. On the other hand, the data on the willingness to return from Poland to Ukraine are equally interesting and worth analysing. The Border Guard data suggest that this scenario has been implemented by some people since around the beginning of May. Since then, the registered number of Ukrainian citizens crossing the border from Poland to Ukraine has been higher than those travelling from Ukraine to Poland. The number of these border crossings represents a small percentage of people who have entered Poland since the outbreak of the war; however, the very fact that such a phenomenon occurred indicates that some people, for various reasons, choose to return to their homeland despite the hostilities continuing there. If the hostilities do not escalate significantly in the nearest future, it can be expected that the trend to leave Poland will continue at a similar level.

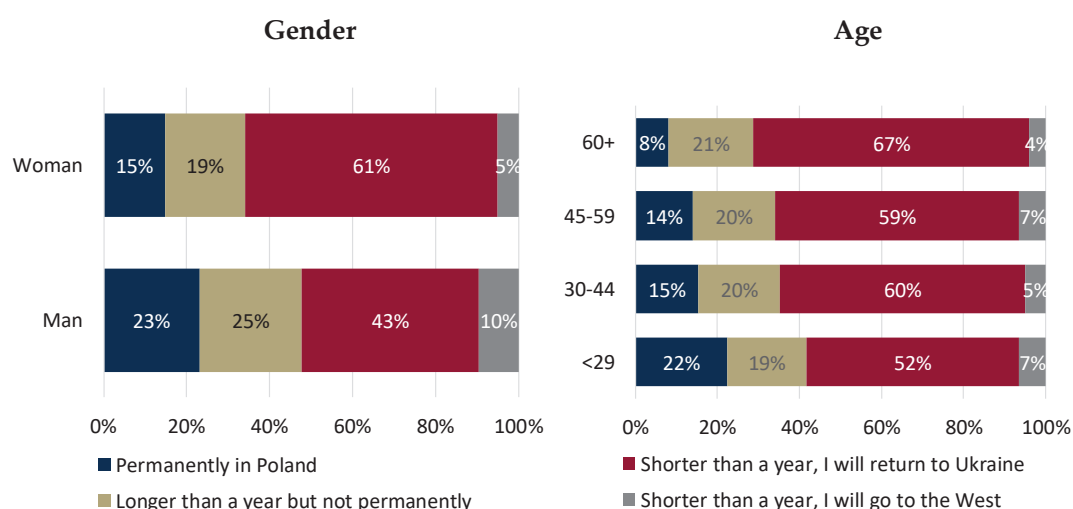


With regard to departures to other countries, in particular European countries, all available estimates (no official statistics are available) indicate that this is also a solution to the difficult situation they are facing which is popular among refugees. According to UNHCR data, in mid-June, there were more than 2.3 million such persons in European countries (excluding Poland), with the highest number – 780,000, in Germany. Because Poland has a border with Ukraine and the highest number of refugees crossed the Polish border, it may be assumed that the vast majority of refugees currently residing in Western European countries had stayed in Poland at least for some time and that it was from Poland that they travelled to the country they currently reside in. However, the percentage of indications of willingness to go to another country obtained in the survey at a level of 5% suggests that the majority of people who would like to travel further west from Poland have already accomplished their plans and large groups of refugees are not expected to move to the west from Poland in the near future. However, return trips from Poland to Ukraine are much more likely.

#### 4.1. Basic demographic characteristics and the declared intention of further stay in Poland

In terms of basic demographic characteristics such as gender and age, two trends have clearly emerged (Error! Reference source not found.). Firstly, although men are in a definite minority among people escaping from Ukraine, it is men who are more likely than women to think about staying in Poland permanently (23% against 15%). Moreover, men consider moving to another country in the short term much more frequently. Secondly, young people under 29 are far more likely to stay in Poland – 22% of respondents. The older the respondents, the stronger the desire to return to their home country quickly.

**Figure 26. Planned continued stay in Poland and the basic demographic characteristics**



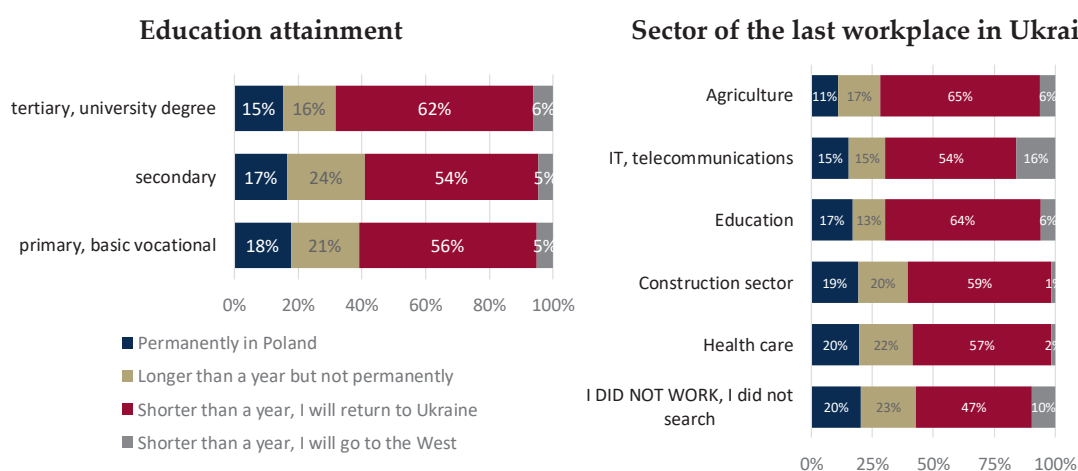
Among persons over 60, as many as 67% of them plan to return to the country within a year. This result is not surprising since this is the age group with the lowest mobility and such people rarely make decisions to migrate under normal circumstances.

Women, who account for approx. 90% of adult refugees are much more likely to treat the current situation as temporary and as many as 61% of them would like to return to Ukraine within the next few months. Moreover, women represent the largest group of people who came to Poland with children but are not accompanied by another adult to care for the children together with them. It is also a situation where they are more likely than others to consider a fast return to Ukraine – 63%. When, in addition to children, the respondent was accompanied by another adult, the percentage of persons interested in travelling from Poland to Ukraine decreased over the year. Without the help of the family, it is more difficult to organise one's stay in Poland with children in one's care and hence the idea of returning to the home country sooner. The situation is quite the opposite if someone came to Poland with children and a spouse. In such a situation, the desire to stay in Poland for more than a year or permanently increases significantly. This answer was given by 23% and 17% of respondents, respectively. The intention to stay longer in Poland, on the other hand, increases even more if a couple came to Poland without children or other family members; in such a case as many as 37% want to stay in Poland for more than a year and only 48% are considering their return to Ukraine within a year.

#### 4.2. Planned continued stay in Poland in the context of the economic situation of refugees

In terms of further refugee plans, persons with a university degree (62%) are interested in returning to Ukraine as soon as possible (Figure 27).

**Figure 27. Planned further stay in Poland vs the level of education and the sector of last place of work in Ukraine (selected categories)**



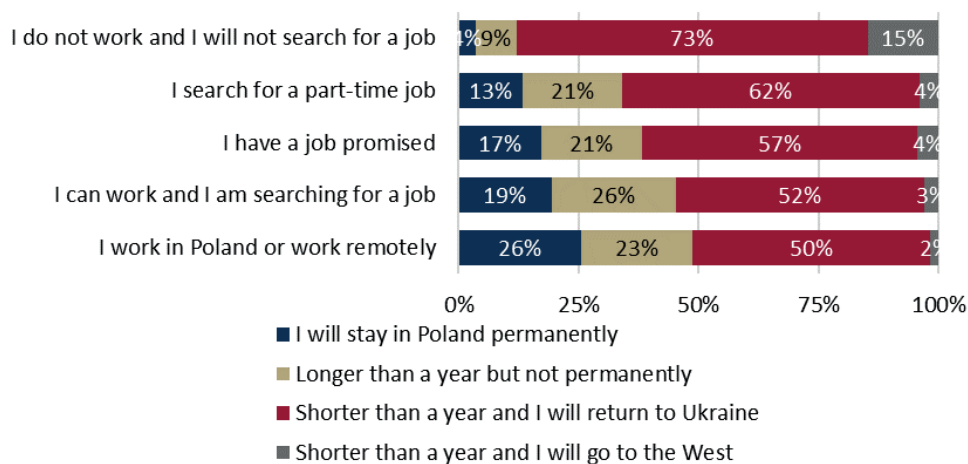
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It could seem that such people have the best chances of finding their place in the Polish labour market, but it is possible that not all of them are able to get a job in Poland which is in line with their qualifications, with a wage that allows them to have a standard of living similar to the one they had in their home country. Since persons with a university degree represent the largest part of the refugees staying in Poland, the fulfilment of the declaration of a fast return to the country, in the case of this group, would mean an outflow of a significant number of people from Poland.

Another important aspect is the occupational experience of those who have come to Poland and how their residence plans are distributed in this perspective. It turns out that those who did not work in Ukraine and were not looking for a job are the most interested in staying in Poland, both permanently and for a longer period of time (20% and 23%, respectively). Since such an answer was most often provided by young people, it can be assumed that they were not unemployed by choice, but they were rather people who had just finished their education or were in the process of studying, as well as women who were outside the labour market due to childcare. On the other hand, it is relatively common for those people to declare an intention to travel to another country – 10% of the indications.

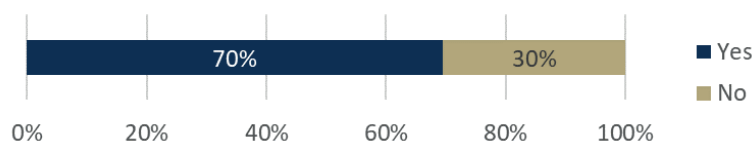
Among people working in their country before the war, those employed in health care are the most interested in staying in Poland (20% want to stay permanently and another 22% want to stay for more than a year), only 2% of this group want to move to the west. On the other hand, those working in agriculture prior to their departure consider returning to their home country soon (63%), which in practice may be associated with their or someone in their immediate family having their own farm and a sense of responsibility for the work necessary to be done there. IT professionals, on the other hand, are most interested in leaving to another country (16%), which is not surprising given the opportunities to find a job in the profession and the potential level of earnings.

Regarding the impact of the current situation of refugees on the labour market on their plans to leave Poland, up to 73% of those who are not working and looking for a job are interested in leaving within a year. Interestingly, they are mostly well-educated people who were active in their home labour market. On the other hand, half of persons who managed to take up a job in Poland or are continuing their previous work online want to stay in Poland, either permanently (26%) or at least for more than a year (23%).

**Figure 28. Planned continued stay in Poland and activity on the labour market**

### 4.3. Factors likely to affect future plans

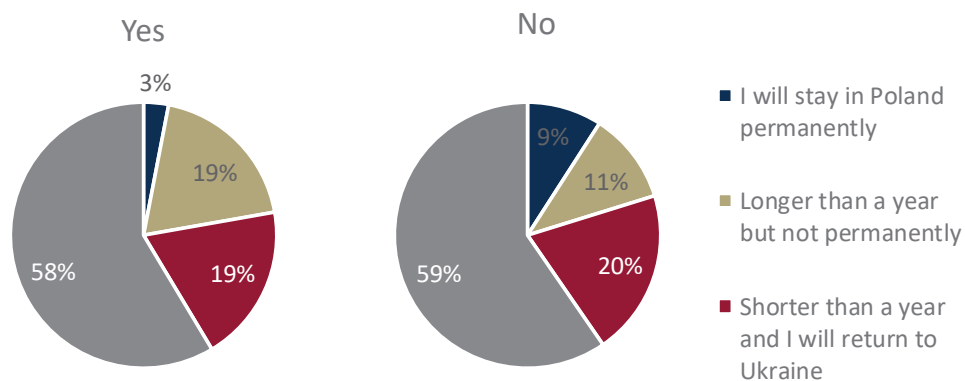
The factor that could most strongly affect the implementation of plans concerning a further stay in Poland would be the end of the war (**Figure 29**). 70% of respondents asked whether they would return to Ukraine within 3 months if the war ended quickly, answered yes.

**Figure 29. Would you return to Ukraine within 3 months in the event of a fast termination of hostilities in the near future?**

This result is slightly higher than the result obtained for the question on further plans to stay in Poland, where 59% of respondents answered that they wanted to leave Poland for Ukraine within a year. It means that the perspective of a quick end of the war and the possibility of returning to a safe country would be a motivation to return even for some of those people who had planned to stay in Poland for longer.

In the context of estimating the number of refugees residing in Poland (lack of official data) but also the number of persons who could potentially stay in Poland for a longer period of time, reference is often made to the number of persons who applied for a PESEL number (**Figure 30**). Under the special act of law of 9 March 2022, people who arrived in Poland after the outbreak of the war and applied for a PESEL number automatically acquire a number of rights, including the right to legal work, health care, access to the education system and also a number of financial benefits. In particular, the PESEL also confers the right of legal residence in Poland for 18 months including the possibility of extending this period. Therefore, these are the premises which, on the one hand, encourage refugees to stay in Poland and, on the other hand, facilitate this process as much as possible.

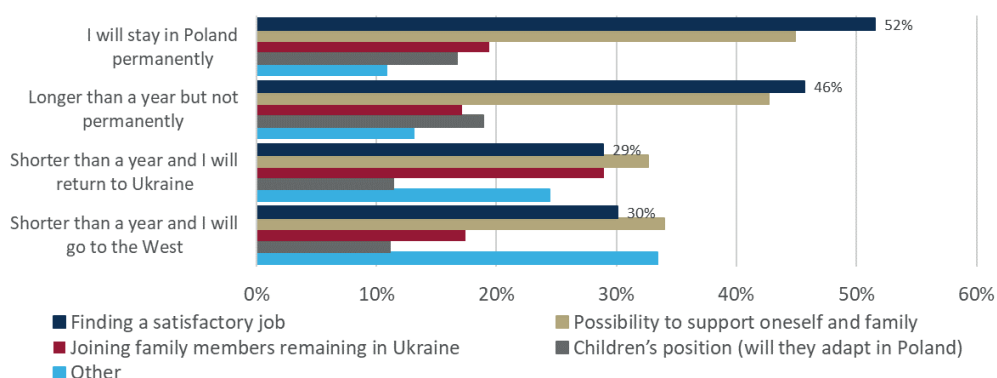
**Figure 30. Holding a PESEL number vs plans of further residence in Poland**



However, as the results of the survey show, despite the fact that refugees are eager to apply for a PESEL (Figure 30), having a PESEL number and access to a range of related powers and opportunities does not generally affect their plans to stay in Poland. The plans of a further stay in Poland of persons holding a PESEL number are similar to those of all respondents and persons without a PESEL number. Therefore, apart from the fact that the PESEL number makes it easier to stay in Poland at a given moment, the powers it involves are not sufficient to encourage refugees to stay in Poland for the long term.

Therefore, what other factors could influence refugees’ decisions? They definitely include the financial conditions (Figure 31). Persons considering returning to Ukraine within a year or moving to the west most often indicated the possibility of sustaining themselves and their family in Poland as the most important condition (29% and 30% of indications, respectively).

**Figure 31. Factors that may affect considering to remain in Poland (two most important factors)**



Satisfaction with the job found is also important, which probably results from the fact that more than half of the refugees have a university degree. Even those determined to stay in Poland permanently or for a longer period of time indicated this answer most frequently, which may signal that under-qualified work and a general lack of job satisfaction may influence their decision to

continue their stay in Poland in the future. At that point, it is worth noting that despite the possibility to choose two answers in this question, a substantial part of respondents chose only one option, which was most often the intention to find a satisfactory job.

In terms of non-wage factors for persons planning to leave Poland for Ukraine quickly, the most important factor was to reconnect with family members who had remained there (29% of indications). Persons intending to stay in Poland longer or permanently also frequently indicated the position of children and how they would find their place in the Polish reality – 19% and 17% of indications.

Very often, especially persons wishing to go further west, but also those planning a fast return to Ukraine, indicated other factors than those specified in the cafeteria response that might influence their decision – 33% and 24% of responses. When analysing the answers to other questions, it can be assumed that one such factor is the current housing situation (**Figure 32**). Persons renting a dwelling or a room on their own are more likely than others to declare their intention to stay in Poland permanently (21%). On the other hand, persons living free of charge in hotels (66%), but also those living with Polish families or their Ukrainian friends (62% and 61% of indications, respectively) are considering a fast return to their homeland. This is probably due to the high level of temporary nature of such a solution. Those staying in collective accommodation are more likely than others to consider moving to another country in the short term (19%).

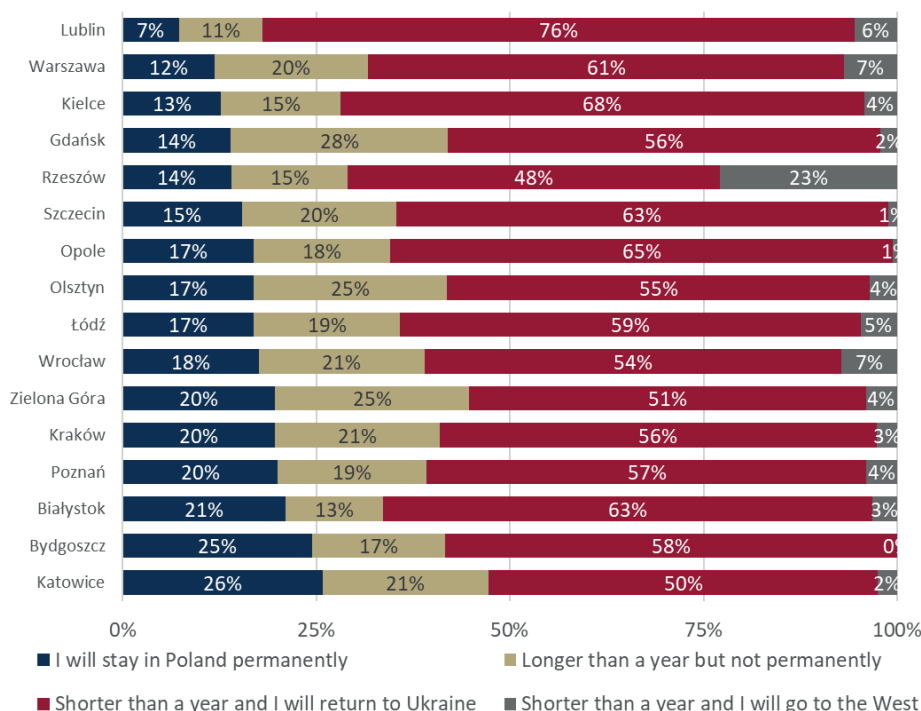
**Figure 32. Planned further stay in Poland vs. current accommodation in Poland**



To the extent that the housing situation may determine whether to stay or leave Poland, the real estate market, at least in large cities, lacks housing for rent, especially dwellings the refugees can afford. The amendment to the special act of law introduced at the end of June, waiving the daily subsidy of PLN 40 per person to Polish families for providing accommodation and food for refugees, will certainly further complicate this situation. For some of them, it may even accelerate their decision to leave Poland. An alternative may be to move to smaller towns, but refugees may have difficulty finding a job there.

An analysis of their plans in terms of the city in which they currently reside (**Figure 33**) is a certain sign of where Ukrainian citizens who have arrived in Poland find their place and where they are most willing to stay for in the long term. It turns out that these are not the largest agglomerations. Only 12% of respondents want to stay permanently in Warsaw, 17% in Łódź, 18% in Wrocław, while the best performer among the four largest cities is Kraków, where 20% of respondents want to stay permanently.

**Figure 33. Planned continued stay in Poland vs. the current place of stay**



At the same time, 26% and 25% of respondents, respectively, would like to stay permanently in Katowice or Bydgoszcz. Such a distribution of responses may result from several factors. First of all, the largest cities were the easiest to get to and it was the most accessible solution under the circumstances where refugees escaping from the war were accompanied by great stress. Refugees may have headed to smaller towns more consciously or have chosen these destinations because of the presence of another family member there. A high share of refugees declaring to stay in Poland for more than a year was enjoyed by voivodeships with a relatively low unemployment rate and a well-developed industrial and service sector in which immigrants can work (Śląskie, Pomorskie voivodeships).

Particularly noteworthy, however, are the cities of Rzeszów and Lublin, i.e. those located in the immediate vicinity of the border with Ukraine. As many as 23% of respondents in Rzeszów declare that they want to go further west and no other city has reached even a similar result. This may suggest that people crossing the border who already have clear plans for their onward journey when they enter Poland, in most cases do not even arrive in other cities, but head straight from Rzeszów across the border. With regard to Lublin, it is here that the largest number of people plan-

ning a fast return to the country are staying (76%), who probably decided to stay close to the border precisely because of their desire to leave Poland quickly. When analysing the refugees' plans regarding their further stay in Poland, a strong desire to return to the country and treat the current situation as temporary is clearly seen. The comparison of their plans with other information collected in the survey shows how many factors, ranging from their family situation to various independent factors such as finding a viable job or the possibility of finding accommodation, can influence these plans.



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## 5. Annex. Survey method and weighing of results

A major impediment to surveying immigrants in Poland is the lack of a possibility to use a random sampling frame from which respondents for the survey could be drawn.

The present study was conducted on a sample of people selected in a random-quota manner, i.e. the interviewers were to ensure a certain minimum diversity of respondents according to selected characteristics and avoiding the so-called snowball effect, i.e. avoiding surveying people who stay together or have known each other. The survey was conducted in and around the voivodeship cities of Poland using questionnaires prepared in Ukrainian, Russian or Polish among the Ukrainian refugees met.

Due to the high probability of the sample being materialised in a different way than the proportions of refugees according to selected characteristics (such as voivodeship and district, age and sex) observed for the whole population according to the available data, it became necessary to weigh the results obtained so that the proportions of people with specific characteristics based on which the results are calculated correspond to the proportions in the published data on the population of people who have registered in the PESEL system. It has been assumed that the proportions of persons in the total population containing refugees who have not registered in the PESEL system are the same as the proportions of persons by province, age and gender in the PESEL system. Moreover, it has been assumed that due to conducting the survey in and around voivodeship cities, the population for the calculation of the weights would be narrowed down to the counties comprising the voivodeship cities and their surroundings.

The construction of the analytical weights was based on the equation:

$$w_i = \frac{N_i}{n_i}$$

where  $N_i$  was the size of the population of a given group  $i$  of refugees identified by province, age and gender (e.g. women, in and around Warsaw, aged 34-44),  $n_i$  was the size of the group  $i$  in the realised sample, while  $w_i$  is the weight – the multiplier by which the raw survey results should be multiplied in order to obtain results representative of the refugee population.

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