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BANK POLSKI

The living and economic situation of migrants from Ukraine in Poland in 2024

Survey report



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This Report would not have been produced without the staff of the NBP Regional Branches responsible for conducting the survey. They included, in particular, the following: Kinga Banyś, Mariola Baryza, Katarzyna Będkowska-Adamiec, Beata Bojda, Anna Burghardt, Tomasz Czechowski, Elżbieta Czorek, Monika Drobińska, Anna Dyksa, Jolanta Filipowska, Artur Gajda, Krystyna Gałaszewska, Robert Goch, Marek Grygorowicz, Monika Jabłońska, Marek Jackowicz, Tomasz Kasperowicz, Piotr Kędziora, Joanna Krzysztof, Renata Kwiatkowska, Robert Leszczyński, Michał Lustrynowicz, Agata Łukasiewicz, Diana Łukaszek-Rozpendowska, Kamila Miśkiewicz, Marek Momot, Magdalena Morońska, Iwona Motylska, Jakub Mroczek, Filip Munko, Iwona Nawrot- Szczepanik, Paweł Oktaba, Bartosz Oliwa, Małgorzata Pałka, Grzegorz Paszczyk, Kinga Paszkiewicz, Jolanta Pawlińska, Grażyna Rodak, Justyna Rogowska, Beata Staniszevska, Paulina Staniszevska, Wioletta Stańczyk Patryk Strzałkowski, Anna Tomska-Iwanow, Małgorzata Tracz, Ewa Waszkiewicz, Damian Werbowy, , Piotr Więcko, Tomasz Wysocki, Iwona Zadrożna, Marta Zaorska, Krystyna Złamaniec and Adrian Żak.

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Summary

This Report presents results of the survey conducted among Ukrainian immigrants between 6 May 2024 and 5 July 2024. The key findings of the survey are as follows:

1. **Work is the main source of income for immigrants from Ukraine.** Wages from work represent on average approximately 90% the of income of a pre-war immigrant and 76% of the income of a refugee. Supplementary income, mainly in the case of refugees, derives from Polish social benefits and income from Ukraine in the form of family support and pensions. The economic situation of refugees is more difficult than that of pre-war immigrants.
2. **The Polish labour market participation of immigrants from Ukraine is very high.** The share of those working or searching for work among immigrants was 78%, which is significantly higher than among Polish citizens. The employment rate of immigrants has also been slowly increasing thanks to an increase in the employment rate among those who arrived after 2022.
3. **Unemployment among refugees, much higher than in the Polish economy in general, remains a major problem.** 19% of male and female respondents who arrived after 2022 were unemployed. According to the LFS data, the comparable share was less than 2%. A large proportion of female refugees with children seek only part-time work, which is a problem given the low number of part-time contracts in the Polish economy.
4. **The structure of labour demand results in higher paid migrant work at job positions where men are more likely to work.** In the survey, the difference between the median of salaries of male and female immigrants was 25%. This makes the economic situation of refugee women in Poland more difficult.
5. **With the passage of time the percentage of Ukrainian immigrants preferring to settle permanently in Poland does not increase.** In the case of Polish immigrants in Western Europe, over time they increasingly declared their intention to stay abroad for longer. In the case of Ukrainian immigrants in Poland, the number of those who prefer to remain in Poland permanently differs depending on whether they are pre-war immigrants (around 50% of respondents) and those arriving from 2022 onwards (around 20% of respondents); however, this remains stable from survey to survey.
6. **Polish language skills have improved among both pre-war immigrants and refugees, which reflects both social and economic integration.** The percentage of immigrants declaring that they were fluent in Polish has increased significantly (68% of pre-war migrants and 28% of refugees). In turn, only 9% of refugees and less than 3% of pre-war migrants reported that they did not know the Polish language. Migrants are well-educated people. Almost half of them have a university degree.
7. **The economic situation of people over 60 varies, but is more difficult than that of immigrants in general.** The average monthly income of an immigrant from Ukraine aged 60 and over is approximately 60% of the average income of all immigrants from Ukraine.

In addition, the majority of them (58%) do not earn income from work in Poland. Therefore, income from Ukraine and from Polish social benefits plays an important role in the income structure.

8. **The housing situation of pre-war migrants and refugees is gradually becoming similar, indicating the increasing integration of refugees.** Slightly more than 70% of immigrants from both immigrant groups rent accommodation. The two groups of immigrants differ by a significantly higher proportion of people who own their own accommodation among pre-war immigrants, and the still prevalent residence in collective accommodation among refugees.
9. **More than 90% of Ukrainian children residing in Poland have benefited from the Polish education system.** According to their parents and guardians, the greatest difficulty for their children during their residence in Poland is the lack of knowledge of the Polish language (36%), the lack of friends (33%) and the worsening of their standard of living compared to the situation before the war (29%).
10. **Migrants continue to support their relatives in Ukraine.** 40% of migrants provide their family members with funds and 49% with in-kind aid. An upward trend is noticeable as far as in-kind aid is concerned.
11. **More and more immigrants do not have plans for the future.** As compared to previous surveys, the percentage of “hard to say” responses in the residence plans have increased among both pre-war immigrants (to 39% from 36% in 2023) and refugees (to 56% from 48% in 2023).
12. **The main factors contributing to Ukrainian migrants residing longer in Poland are related to their work.** According to approximately half of the respondents regardless of their date of arrival, such a factor is the possibility to support themselves and their family. The second most frequently mentioned factor is finding a rewarding job.
13. **The social needs of immigrants are not reported among the most important forms of potential assistance.** The majority of Ukrainian immigrants are in favour of easier legalisation of a longer residence in Poland. Furthermore refugees emphasise that they need assistance learning the language and finding employment.
14. **Compared to the 2023 survey, the socio-demographic structure of Ukrainian migrants residing in Poland has not changed significantly.** The gender structure is still dominated by women, who comprise about 67% of migrants (54% in the group of pre-war migrants and 76% in the group of refugees). The age profile of the surveyed group is characterised by a concentration of people who are between 27 and 44 years old (they make up half of the respondents). Migrants are well-educated people. 47% of pre-war migrants and 46% of refugees have a university degree. Immigrants come from all regions of Ukraine. There were no major changes in migration to Poland from the regions of armed conflict.

Introduction

This Report summarises the survey conducted among migrants from Ukraine between 6 May 2024 and 5 July 2024 in all voivodeships. Surveys of migrants from Ukraine began to be carried out by Narodowy Bank Polski in 2015, following the emergence of larger-scale migration from Ukraine and its impact on the Polish labour market and balance of payments. In its current format, the survey has been conducted on an annual basis since 2022. The aim of this year's survey has been to diagnose the economic and living situation of immigrants more than two years after the outbreak of the war and in particular to assess their labour market participation and income situation. In addition, it is still important to attempt to assess whether migration from Ukraine is of a settlement or temporary nature, and to track the scale and characteristics of remittances from Poland to Ukraine.

For the current survey results to be analysed, it is necessary to describe briefly the development of migration processes over the last decade. Migration to Poland from Ukraine started intensifying in 2014. Initially, it was triggered mainly by economic issues¹, i.e. the difference between salaries in Poland and Ukraine, and Polish regulations allowing Ukrainian immigrants to work in Poland. Russia's attack on Ukraine in 2014 (the annexation of Crimea and attack on Donbas) was seen as an additional factor. At the beginning, Ukrainian migration was predominantly of a circular nature. Over time it has become more settled. This change was triggered primarily by the Covid-19 pandemic and by Russia's attack on Ukraine in 2022 and the outbreak of a full-scale war. According to the publicly available data from the PESEL-UKR registers, almost one million migrants arrived in Poland after the outbreak of war in 2022. It is important to note that this figure includes 380,000 children under the age of 18, which means that approximately 600,000 adults were in this group of migrants (**Figure 2**). According to the data on the number of valid residence permits issued by the Polish Immigration Authority, on the other hand, in 2024 there were more than 0.5 million valid residence permits issued, primarily, to persons who arrived in Poland before 2022 (**Figure 1**).

According to Statistics Poland (GUS), slightly over 690,000 Ukrainian migrants worked in Poland at the end of February 2024. This was the largest group of foreigners working in Poland (approximately 68% of the total number of working foreigners).²

¹ Chmielewska I., Dobroczycki G. and Puzyrnikiewicz J. (2015), Ukrainian citizens working in Poland – report from the survey conducted in 2015, Narodowy Bank Polski, Warsaw, p. 12

² Source: Statistics Poland, Foreigners performing work in Poland in February 2024
https://stat.gov.pl/download/gfx/portalinformacyjny/en/defaultaktualnosci/3574/12/15/1/foreigners_performing_work_in_poland_in_february_2024.pdf

Figure 1. Number of valid residence permits issued to migrants from Ukraine in 2020-2024³

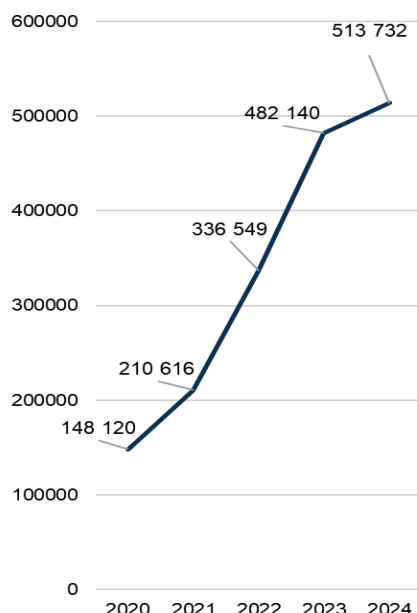
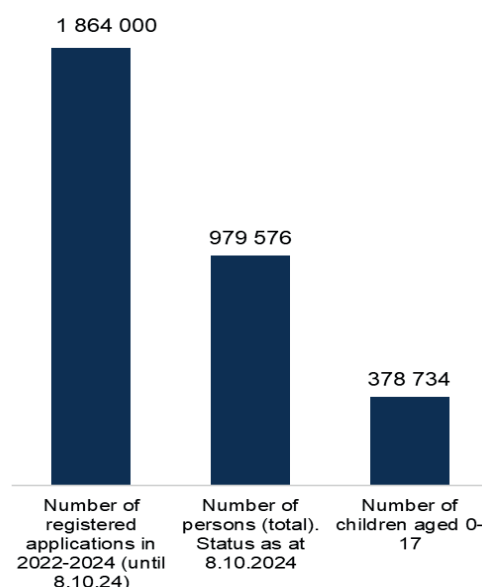


Figure 2. Number of immigrants from Ukraine in the PESEL-UKR Register⁴



Surveys conducted by Narodowy Bank Polski provide an insight into Ukrainian migration in Poland in terms of both socio-demographic and economic conditions. The survey makes a distinction between pre-war immigrants, people who migrated to Poland before 2022, and refugees, people who found themselves in Poland due to the outbreak of war in 2022. The Report makes references to the three previous NBP surveys. The first was conducted in April and May 2022 among refugees. The next two, which covered both pre-war migrants and refugees, were conducted between September and November 2022 and between May and July 2023 respectively.

³ Source: Polish Immigration Authority [UDSC] MIGRACJE.GOV.PL – Maps and Statistics of immigration and migration services in Poland

⁴ Source: PESEL-UKR Register, Detailed statistics on persons entered in the register of citizens of Ukraine and members of their families who have been granted the status of a migrant on the basis of the specific laws. As at 8 October 2024 – Open Data (<https://dane.gov.pl/pl/dataset/2715,zarejestrowane-wnioski-o-nadanie-statusu-ukr/resource/61317/table>); Statistics on the UKR migrant status applications filed in connection with the conflict in Ukraine – Open Data (<https://dane.gov.pl/pl/dataset/2715,zarejestrowane-wnioski-o-nadanie-statusu-ukr>)

1. Socio-demographic characteristics of migrants from Ukraine

1.1. Basic characteristics of respondents

An analysis of the gender structure of the surveyed population of Ukrainian migrants in 2024 showed a clear predominance of women (67%). It was noticeable among both pre-war migrants (54%) and refugees (76%) (**Figure 3**). This trend has continued since 2022, when a wave of female refugees emerged, reflecting the dominant role of women in both labour and flight migration from Ukraine to Poland.

Figure 3. Gender structure

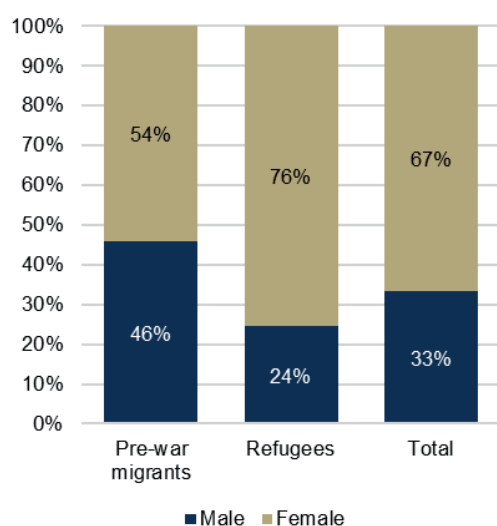
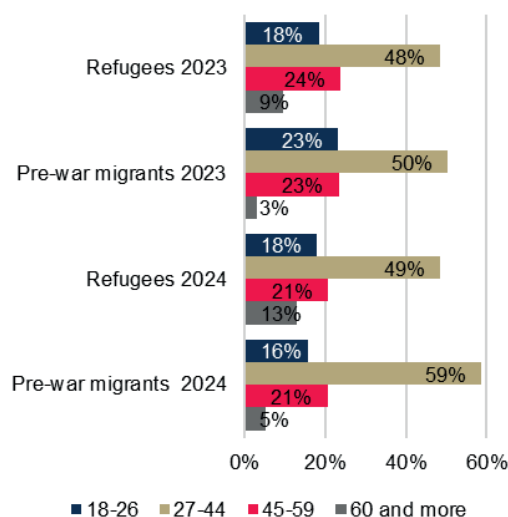


Figure 4. Age of migrants from Ukraine



The age profile of the group surveyed is characterised by a clear concentration of people in the age range between 27 and 44, i.e. people who are at their prime age, i.e. at the age of starting a family and of the highest labour market participation (**Figure 4**). This is in line with general migration trends, which show that people in this age group are more likely to decide to migrate for work or in search of better living conditions. What differentiates the 2023 and 2024 surveys is the higher proportion of people aged 60 and over in the current edition of the survey.

The level of education among Ukrainian respondents varies. The 18-26 age bracket has a lower proportion of people with a university degree (26%), compared to the average for the entire group surveyed. The reason for this could be that some young people may not have had time to obtain a university degree before the age of 26. Overall, the majority of respondents have a secondary or university education (**Figure 5**). In the context of the previous editions of the migration survey, the age structure has not changed significantly, but the number of people with primary or vocational education has dropped significantly.

The majority of pre-war migrants came to Poland from the western (31%) and central (25%) parts of Ukraine (Figure 6). These regions are not far from the Polish border, which boosts migratory mobility. The largest number of refugees also came from the western region of Ukraine (23%) and their share increased slightly, as compared to the previous year. In the 2024 survey, there were no major overall changes in migration to Poland from the regions affected by the armed conflict.

Figure 5. Education of immigrants

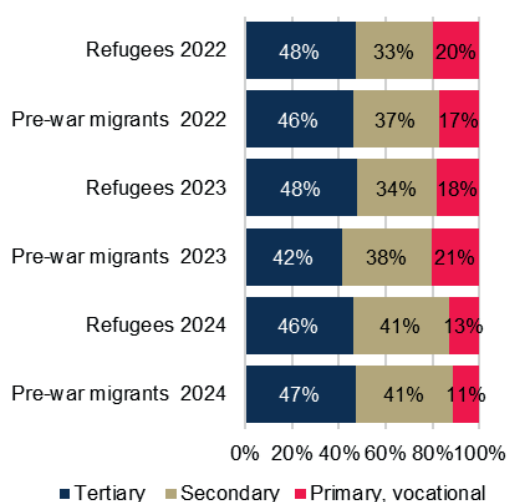
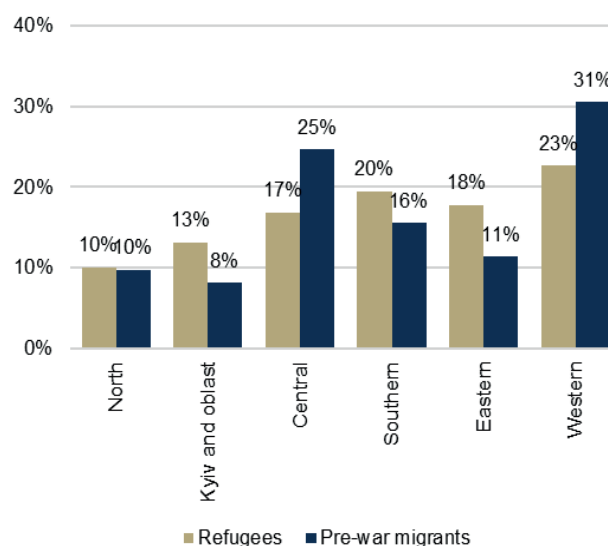


Figure 6. Region of origin

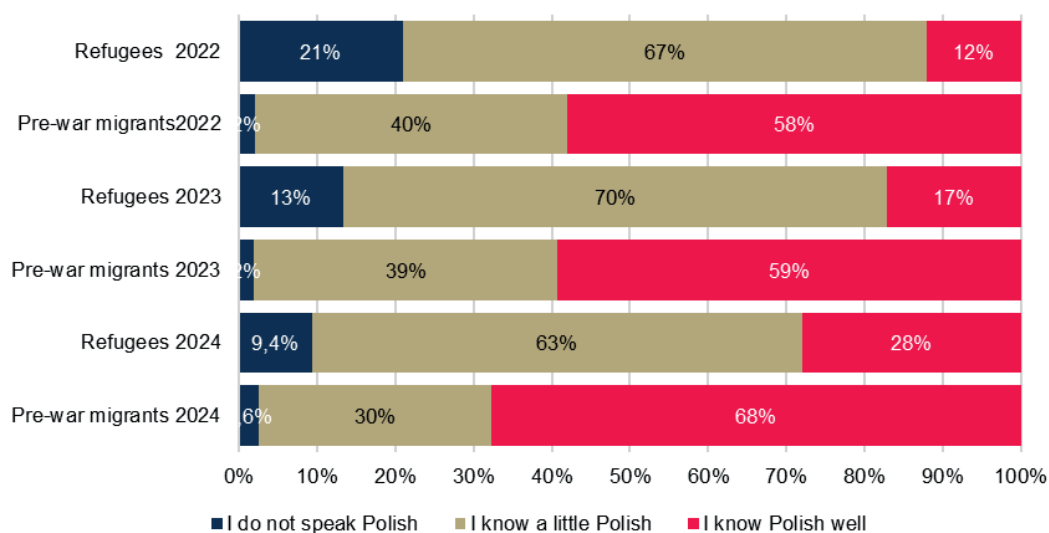


An analysis of the history of changes in respondents' knowledge of the Polish language shows that it has improved in both groups of migrants, as compared to the earlier editions of the survey (Figure 7). The percentage of Ukrainian refugees with little or no knowledge of the Polish language has decreased significantly, and the percentage of those who know it well has increased. This suggests that a longer residence in Poland contributes to faster language integration.

The family situation of Ukrainian immigrants in Poland is an important element in the analysis of their social and economic integration. Family conditions can influence both the

decision to reside in Poland and adaptation in the new country. Respondents from Ukraine who settle in Poland have different family situations.

Figure 7. Knowledge of the Polish language among migrants from Ukraine



Similarly to last year's survey, the majority of pre-war migrants were in relationships (57%). One in ten people surveyed reported that they had no family and, similarly to the 2023 survey, those without family were predominantly men (Figure 8).

Approximately 44% of refugees and 36% of pre-war migrants came to Poland with their children (Figure 9). Respondents who have partners represent 51% of pre-war migrants and 35% of refugees. Among pre-war migrants, almost half (47%) live with their children. Among refugees, the proportion of those who live with their children is even higher (54%). In 2023, the predominant response among pre-war migrants was "no family", which might have meant that the process of family reunification was slow. It is worth noting that the frequency of visits to Ukraine differs between the pre-war migrant group and the refugees. This provides a better understanding of the different needs and mobile capabilities of the two groups.

Among immigrants who came to Poland before 2022, as many as 80% did not leave Poland at all in the past year, only 13% left Poland once and 6% left Poland several times, which may indicate that their lives in Poland have become more stable. For refugees, the percentage of those who did not leave Poland was 69%, of those who left Poland once was 22%, and of those who left Poland several times during the year was 9%. This may be related to their difficult situation or the desire to maintain ties with the country, family, etc. When asked about the willingness of their family and friends to come to Poland in the coming year, regardless of the length of residence in Poland, respondents said that every fourth person would consider coming to Poland.

Figure 8. Immediate family members*

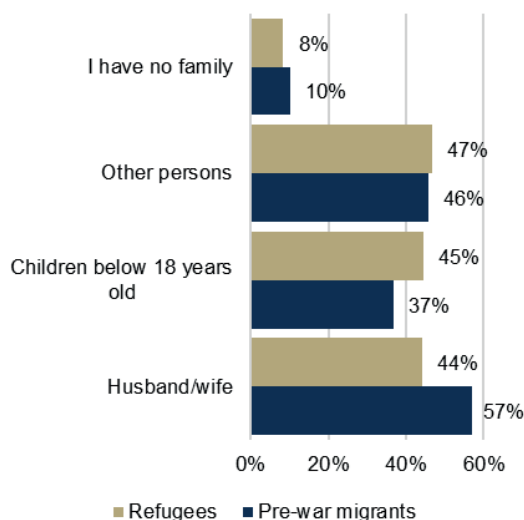
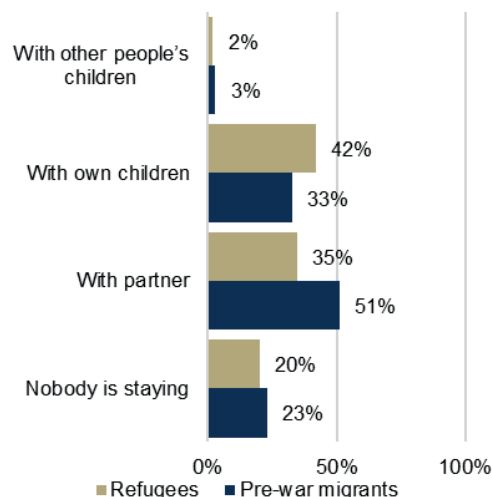


Figure 9. Immediate family members residing in Poland



* Regardless of the country of residence

1.2. Ukrainian children

More than 90% of Ukrainian children, as reported by their parents and guardians, benefited from the Polish education system. As indicated in Chapter 1.1, a significant proportion of immigrants are in Poland with children.⁵ Respondents with children in Poland most often sent their children to a Polish school (77%) or to a Polish and Ukrainian school (15%). Remote learning in Ukrainian schools was reported by 11% of the respondents, and stationary learning in Ukrainian schools in Poland by 6% (Figure 10).

The lack of knowledge of the Polish language and the lack of friends (loneliness) are the greatest difficulties faced by Ukrainian children in Poland. According to parents and guardians, the greatest difficulties for children are the lack of knowledge of the Polish language (36%), the lack of friends (33%) and the worsening of the standard of living in comparison to the situation before the war (29%) (Figure 11). However, it is worth noting that the responses of parents/guardians who are pre-war migrants differ slightly from those who are refugees. According to pre-war migrants, the main difficulty their children face is discrimination on the grounds of nationality (36%). For refugees, the main difficulty for their children is the lack of knowledge of the Polish language (39%).

⁵ On average, there are 1.5 children per respondent with a child under the age of 18.

Figure 10. Types of education systems (nurseries, pre-schools, schools) used by migrant children from Ukraine*

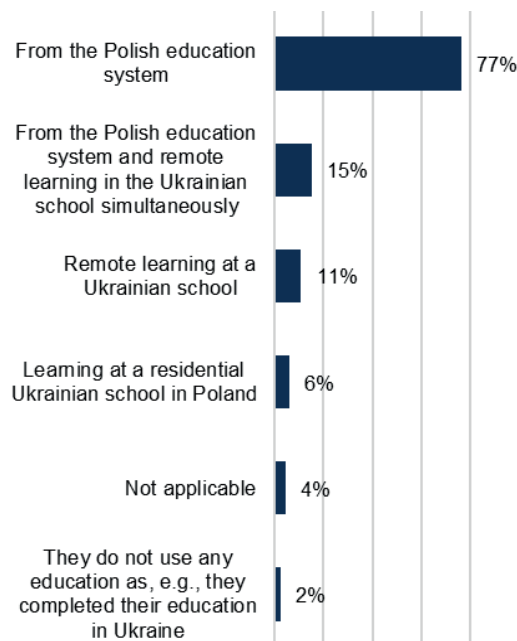
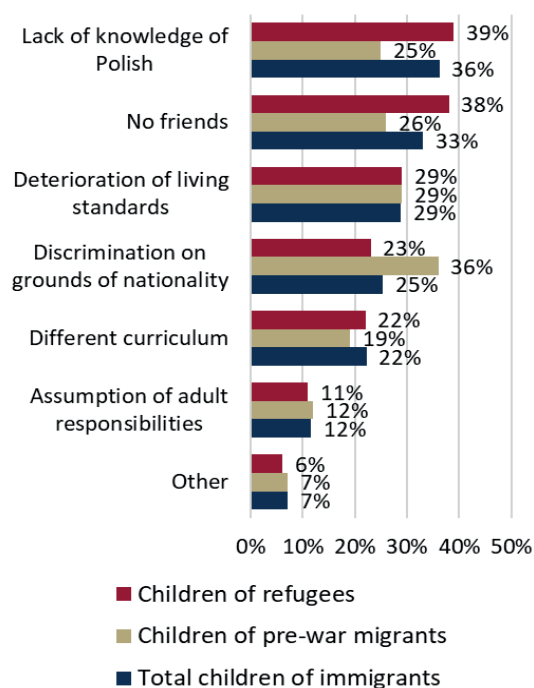
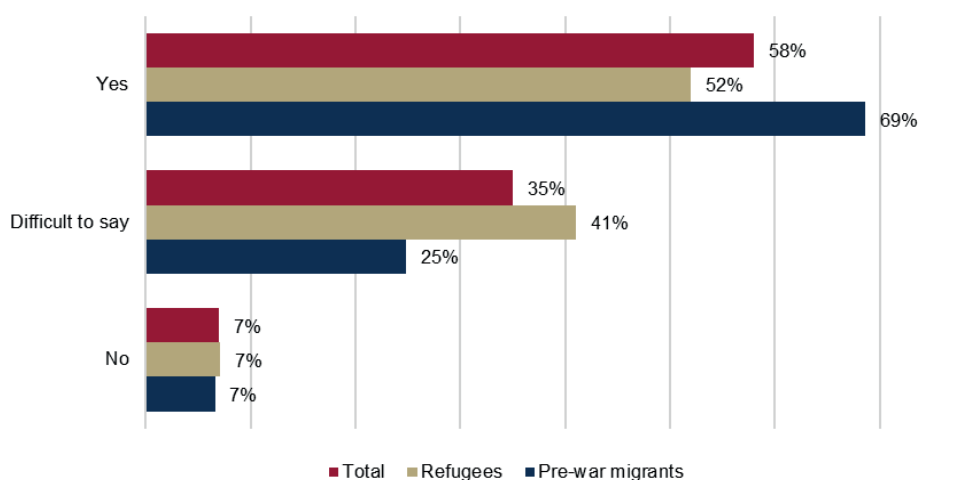


Figure 11. Immigrants' opinions on the greatest difficulties faced by their children in Poland*



* Responses do not add up to 100%. Multiple choices allowed.

Figure 12. Immigrants' views on their children's future: Will your children reside in Poland for many years?



According to more than half of the surveyed immigrants with children in Poland, their children will continue living in Poland for many years. Pre-war immigrants (69%) are more likely to make such declarations than refugees (52%) (**Figure 12**). Parents and guardians of children in both immigrant groups think that the planned residence of their children in Poland will be longer than their own. Only 7% of respondents with children in Poland believe that their children will not reside in Poland for many years.

2. Immigrants from Ukraine on the Polish labour market

Immigrants from Ukraine take up work on average more often than Polish citizens. According to the survey data, the 2024 employment rate among adult Ukrainian citizens residing in Poland was 78% and in the pre-war immigrant group around 93% (**Figure 13**). By comparison, according to the LFS data, the employment rate in Poland among people aged 15 and over was 56%. It should obviously be pointed out that the majority of immigrants are at the age of the highest labour market participation, but even if the age and gender structure of the LFS data was the same as those of immigrants, the employment rate would be close to 67%.

The stagnation on the labour market has not prevented refugees residing in Poland from being employed with higher frequency. In 2024, the employment rate of all Ukrainian migrants in Poland increased from 76% to 78%, which was mainly due to the slightly higher employment rate of those who came to Poland as refugees after 2022 (**Figure 14**). However, it is worth noting that the trend among pre-war immigrants was similar to that among Polish citizens, i.e. the employment rate, as compared to the rate in 2023, decreased slightly.

Figure 13. Labour market participation of migrants from Ukraine in 2023

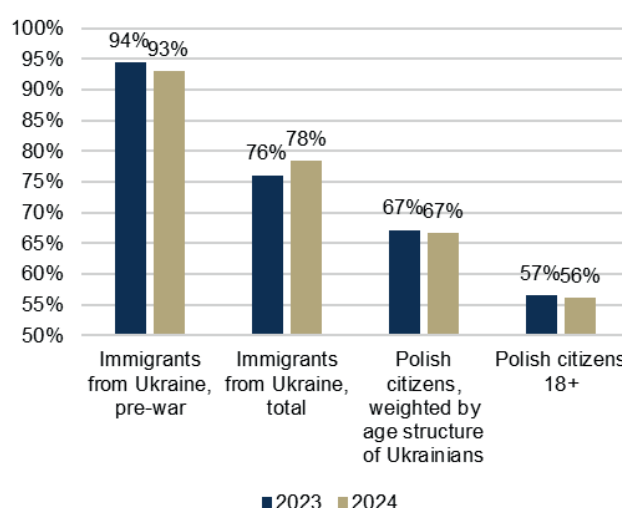
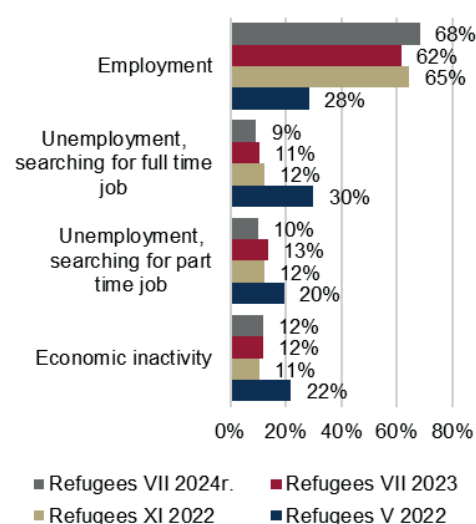


Figure 14. Changes in the labour market participation of war refugees from Ukraine



The employment stability among refugees and pre-war immigrants from Ukraine continues to differ. The employment rate among pre-war immigrants and among refugees was respectively 93% and 68%. However, the employment stability is of more significance for the

labour market situation, and it can be pointed out that 81% of pre-war immigrants were in permanent employment and that for refugees this percentage was 65%. Approximately 17% of refugees were employed on a casual basis and 8% of respondents did not specify the type of employment. (Figure 15).

Figure 15. Structure of the refugees and pre-war immigrants employed, by type of employment

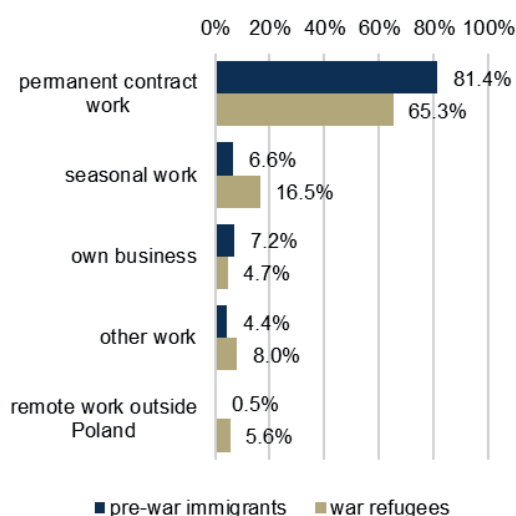
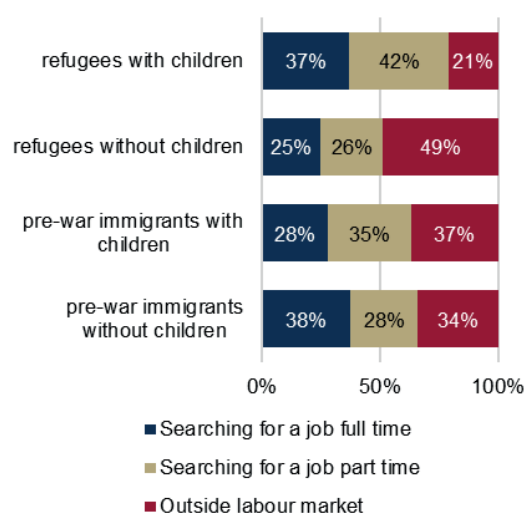


Figure 16. Structure of responses on the labour market status of persons not working in Poland



Wider use of employment on a part-time basis in Poland could help reduce the problem of high unemployment among female refugees who live in Poland with their children. Circumstances relating to the war in Ukraine resulted in the vast majority of people arriving in Poland from 2022 onwards being women and children (Figure 16). Taking care of a family residing in Poland causes 42% of refugees with children in Poland to look for a part-time job (26% if they do not have children in Poland). The trend is similar among pre-war immigrants, although the difference between the share of part-time job seekers in this group is smaller.

Immigrants from Ukraine are increasingly less likely to be employed in simple jobs and more often in jobs requiring more skills. As compared to 2023, the percentage of immigrants in simple jobs fell from 53% to 44%, while at the same time, the percentage of immigrants employed in jobs requiring skills not related to university education increased from 33% to 38%, and the percentage of immigrants in jobs where university education is required increased from 10% to 14% (Figure 17).

Differences between the job positions in which refugees and pre-war immigrants are employed and the polarisation of the work done by refugees are still noticeable. Forced immigrants/refugees are, on the one hand, relatively well-educated people, but on the other

hand, they found themselves in a forced situation in Poland and often their qualifications are not in demand on the Polish labour market. This results in the polarisation of these people's jobs, with employment in occupations offering the opportunity to make use of their university education (16% of refugees as compared to 13% of pre-war immigrants) and in simple jobs (51% of refugees). On the other hand, those who arrived in Poland before 2022 had, on average, lower education, but a better orientation to the Polish labour market and were more likely to have sought-after skills (drivers, construction workers, etc.). This results in 46% of these people (compared to 31% of refugees) using skills in their jobs that are not related to formal university education, while only 37% of them are employed in simple, unskilled jobs (Figure 18).

Figure 17. Skills used by immigrants in Poland in 2023 and 2024

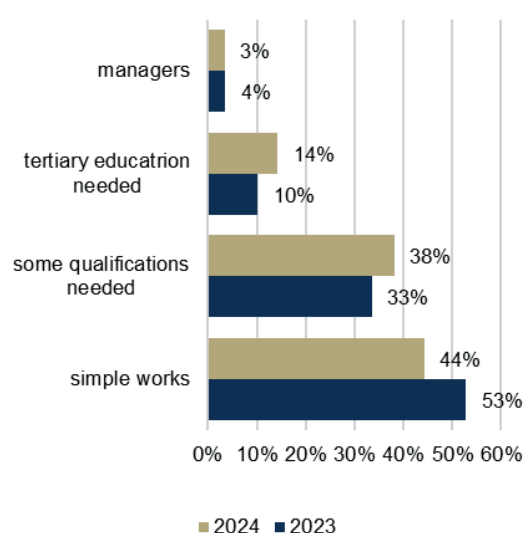
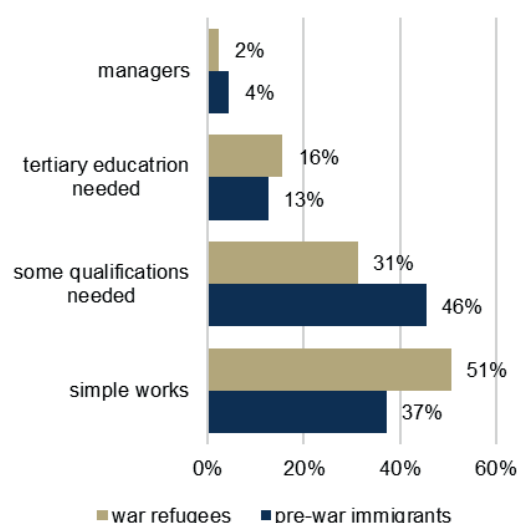


Figure 18. Skills used by refugees and pre-war immigrants in 2024



The wage gap between pre-war immigrants and refugees persists. Around 40% of pre-war immigrants earn a net income of no more than PLN 4,000 (Figure 19). For refugees, the percentage is higher, i.e. 60% (Figure 20). In both cases, the proportion of respondents earning less than PLN 4,000 is lower than in 2023, but it should be noted that in the period between the surveys there was an increase in the minimum wages from around PLN 2,709 (net) in July 2023 to PLN 3,221 (net) in the first half of 2024 (i.e. by around 19%).

Similarly to Poles, immigrants are not often employed on a part-time basis. Immigrants who arrived in Poland before the war worked on average about 4 hours longer per week (Table 1) than Polish citizens.⁶ At the same time, the average time spent at work by refugees was only

⁶ According to the data derived from Labour force survey in Poland – quarter 1/2024 (<https://stat.gov.pl/en/topics/labour-market/working-unemployed-economically-inactive-by-lfs/labour-force-survey-in-poland-quarter-12024,2,53.html>)

slightly higher than the average time spent at work by Polish citizens. Nevertheless, the vast majority of employment was performed on a full-time basis of 40 hours per week and the medians (middle values) prove the same. The inflexibility of employment contracts in terms of hours worked is also evidenced by the relatively small proportion of people working part-time or less: only 4% of pre-war immigrants, between 10% and 12% of refugee immigrants among whom the majority were women. In addition, even among migrants with children in Poland the percentage was only 2 p.p. higher than among forced migrants without children.

Figure 19. Pre-war immigrants and their net monthly salaries in Poland

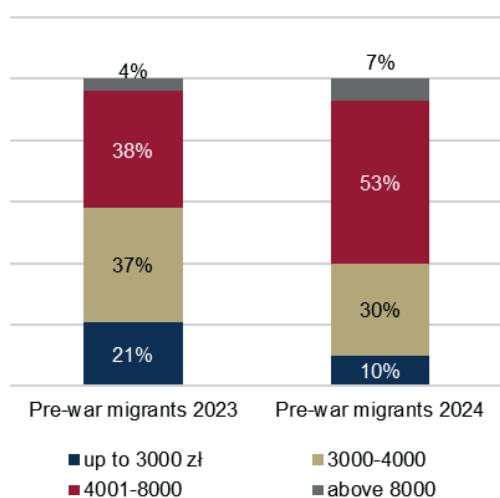
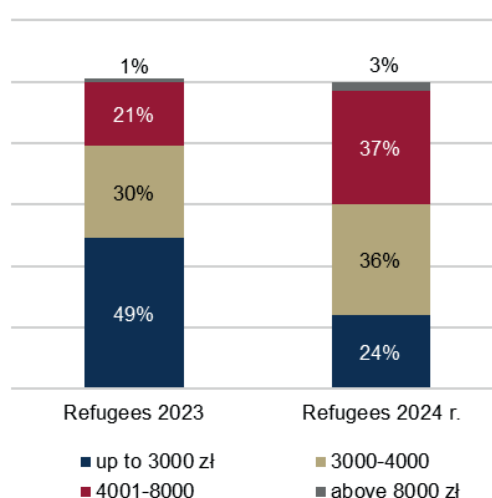


Figure 20. Refugees and their net monthly salaries in Poland

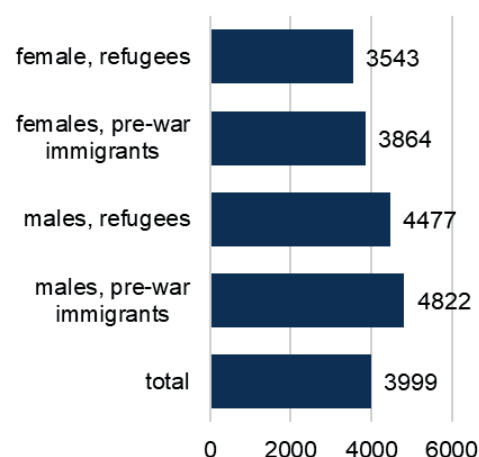
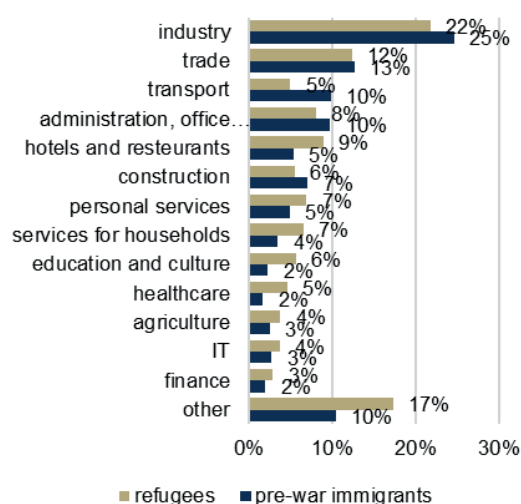
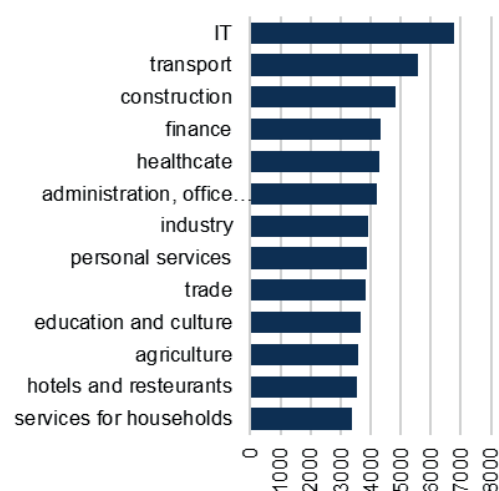


The median of net salaries of immigrants was PLN 4,000. According to Statistics Poland (GUS), the median of net salaries of all employees in the Polish economy was around PLN 4,700. The differences between these values may result from differences in the structure of occupations performed in Poland, in the length of service or in the use of human capital in the work performed (**Figure 21**).

The medians of salaries of immigrants vary more by gender of migrants than by the date of arrival in Poland. The median of salaries of men who arrive in Poland before the war was 20% higher than that of immigrants in general (**Figure 21**). For female refugees, on the other hand, the corresponding measure was 11% lower than for all immigrants from Ukraine. The difference between the medians of salaries of men and women irrespective of arrival was about 25%, while the difference between the medians of salaries of refugees and non-refugees irrespective of gender was about 8%.

Table 1. Hours worked and family situation of immigrants (average values)

	Working part-time or less	Average number of hours worked per week	Median of the number of hours per week
Pre-war immigrants without children	4%	43.8	40
Pre-war immigrants with children	4%	43.8	40
Refugees without children	10%	40.9	40
Refugees with children	12%	39.6	40

Figure 21. Medians of net salaries of immigrants, by gender and by the date of arrival in Poland**Figure 22. Sectors in which immigrants are employed****Figure 23. Medians of monthly net salaries of immigrants, by sector**

The employment sector of immigrants in Poland depends on the date of arrival. About one fourth of immigrants in Poland are employed in industry (Figure 22). People who arrived in Poland before the war are more likely to work in transport, construction (mostly men) and administrative/office work. Refugees (those who have arrived after 2022) are more likely to

work in service industries such as personal services (e.g. hairdressers, beauticians, etc.), hotels and restaurants, services provided directly to households (e.g. cleaning, elderly care, etc.). More often than in the case of pre-war immigrants, these services are also highly-skilled services (e.g. medical care, IT, finance, etc.).

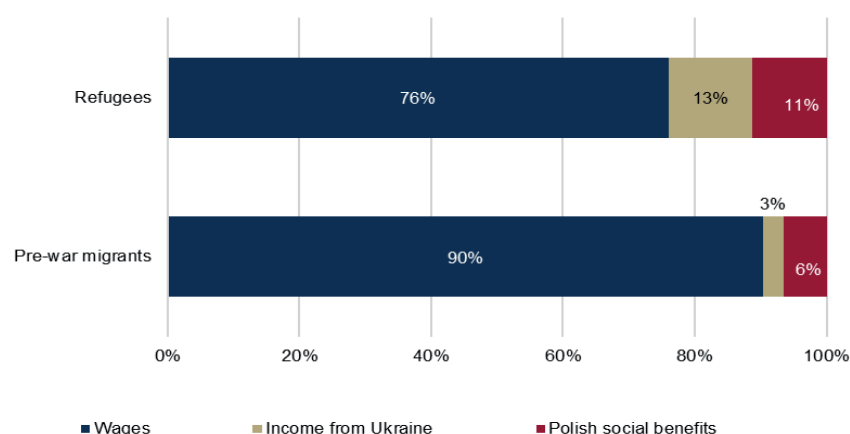
Migrant salaries are higher in “male” industries such as transport, construction and IT sectors. The medians of net salaries calculated on the basis of data derived from the survey were PLN 5,000 or more (**Figure 23**), i.e. they were at least 25% higher than the medians of salaries earned by immigrants in general. The worst paid immigrants were those employed in household services, hotels, restaurants and agriculture. The medians of their monthly salaries were PLN 3,400-3,500. In comparison, the net monthly minimum wage was around PLN 3,200 at that time.

3. Immigrant economic situation

3.1. Income

As in 2023, the main source of income for immigrants from Ukraine is work. Salaries of pre-war immigrants and of refugees are respectively 90% and 76% of their total income⁷ (Figure 24). Income from Ukraine and from Polish social benefits (in particular, the 800+ Programme) mainly supplement the income earned by refugees. As compared to 2023, the share of Polish social benefits in the refugee income structure has decreased slightly.

Figure 24. Income structure of immigrants from Ukraine in 2024



The number of refugees receiving Polish social benefits has been falling. Polish social benefits are 6% of the income of pre-war immigrants and 11% of the income of refugees. They consist mainly of benefits disbursed under the 800+ Programme to 41% of refugees and 33% of pre-war immigrants. For refugees, a downward trend can be observed in the percentage of people receiving this benefit, as well as benefits in general (Figure 25). In the 2022 survey, 52% of refugees were granted benefits under the 500+ Programme. In the 2023 survey, this percentage dropped to 44% and in 2024 to 41% (Figure 26). No such trend was observed for pre-war immigrants. The percentage of Polish pension and unemployment benefit recipients remains at the same level in 2024 and in 2023.

⁷ 93% of pre-war immigrants and over 69% of refugees are employed.

Figure 25. Percentage of Ukrainian immigrants with Polish social benefits in the years 2022-2024

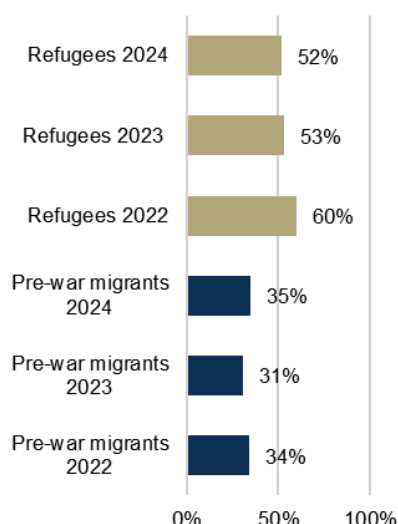
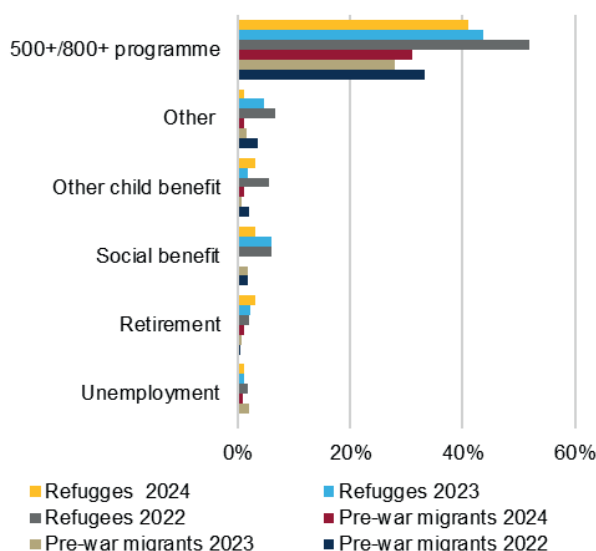


Figure 26. Types of social benefits granted to respondents in the years 2022-2024 (multiple choices allowed; responses do not add up to 100%)



Funds deriving from Ukraine also supplement the income earned, in particular, by refugees. The percentage of migrants receiving funds from Ukraine remained similar to that in 2023, i.e. 24% of total respondents (**Figure 27**). These funds are received primarily by refugees. In 2024, these refugees were 33% of the total refugees. The most common funds received are retirement and health pension payments and financial assistance from families in Ukraine. The percentage of immigrants who receive an average monthly financial contribution of more than PLN 1,000 increased from 42% to 55% (**Figure 28**). However, 45% of immigrants receive funds of less than PLN 500 per month. Similarly as in 2023, more than 50% of these lowest remittances are retirement and disability pensions from Ukraine.

The use of funds from Ukraine is correlated with the labour market situation (Figure 29). When considering refugees in this context, it can be noted that those of them who are in permanent paid employment (19%) are the least likely to benefit from funds from Ukraine. In turn, persons who benefit from such funds most frequently (apart from those working remotely and being paid wages in Ukraine) are those who do not have jobs and are not looking for employment (63%). The percentage of respondents who carry out business activities and who benefit from funds from Ukraine has decreased (from 69% in 2023 to 38% in 2024).

Figure 27. Percentage of Ukrainian immigrants receiving funds from Ukraine

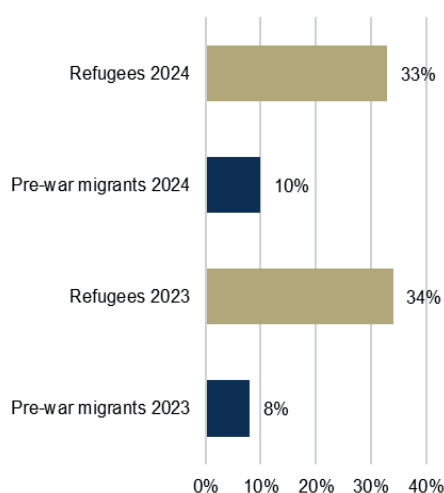


Figure 28. Financial support received on average per month by immigrants from Ukraine

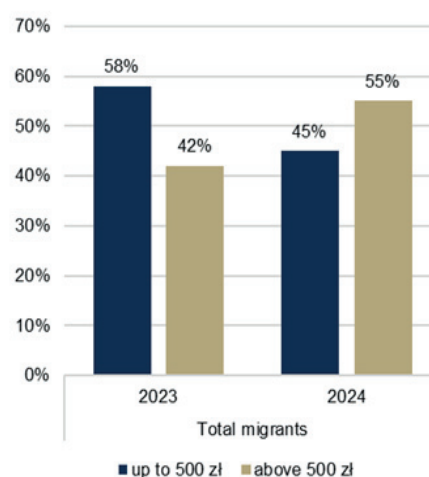


Figure 29. Percentage of refugees benefiting from funds from Ukraine, by labour market status



3.2. Economic situation of people aged 60 and over

A specific feature of Ukrainian migration in Poland is the relatively high proportion of people over 60 years of age. Age is a factor that differentiates people's living and economic situation and determines their adaptability and their needs. A specific feature of Ukrainian migration in Poland is the relatively high proportion of people over 60 years of age and of children. According to the survey carried out by NBP, among the total number of immigrants

from Ukraine, 10% of respondents are people over 60 years of age.⁸ However, their percentage is significantly higher among refugees (13% of all refugees versus 5% of pre-war immigrants). The NBP survey shows that the proportion of people over 60 years of age has increased over the years.

Figure 30. Labour market situation of people aged 60 and over

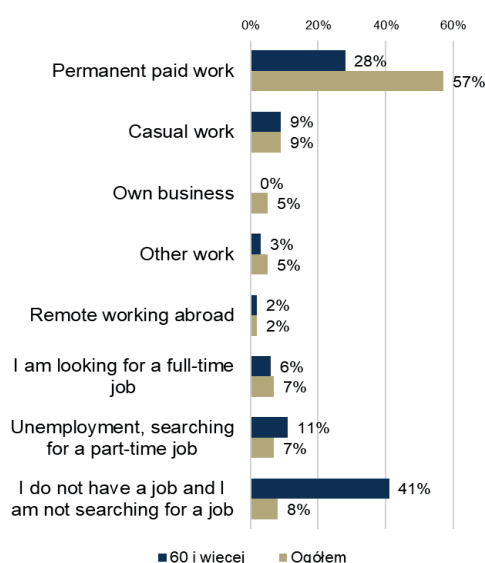
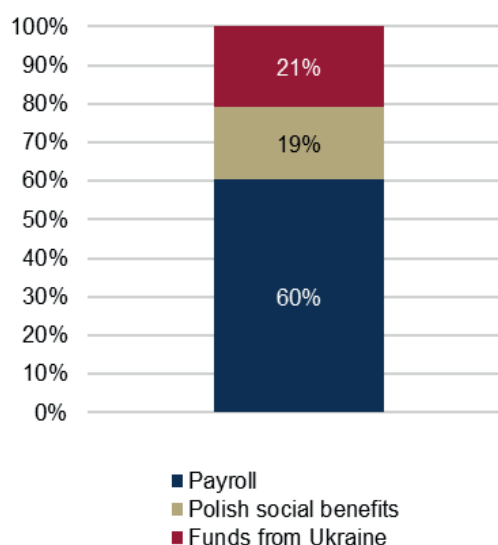


Figure 31. Structure of income of Ukrainian immigrants aged 60 and over (employed and not employed in total)



The average monthly income of an immigrant from Ukraine, aged 60 and over, is approximately 60% of the average monthly income per capita of an immigrant from Ukraine in general, but funds received from Ukraine and Polish social benefits form a significant part of this income. The primary source of average income for an immigrant over 60 years of age is salary (60%). However, almost 58% of immigrants in this age group are not employed. Therefore, a significant proportion of immigrants who are over 60 years of age have an average monthly income significantly lower than the 60% of total immigrant income indicated above. Thus, funds received from Ukraine (21%) and Polish social benefits (19%) play an important role in the income of immigrants. Almost 60% of people over 60 receive remittances from Ukraine, mainly retirement and health pensions (more than half of them are no more than PLN 500). As far as Polish social benefits are concerned, they are paid to persons who are over

⁸ According to the PESEL-UKR register and to the register of residence permits kept by the Polish Immigration Authority, as at 1 August 2024 around 5% of the total number of migrants from Ukraine (around 80,000 people) are over 60 years of age.

60 years old most frequently in the form of retirement benefits (15%), hardship benefits and benefits under the 800+ Programme (11% each).

The housing situation of those aged 60 and over is more difficult than that of Ukrainian immigrants in general. The more difficult economic situation of immigrants over 60 is confirmed by the analysis of their housing situation. It is noticeable that the percentage of people living in collective accommodation for refugees (18%) and the percentage of people (11%) living with family or friends from Ukraine are higher than those calculated for the total immigrant population.

Immigrants aged 60 and over are predominantly women (75%), noticeably less fluent in Polish than other immigrants. The percentage of those with primary and vocational education among them (17%) is higher than among the population as a whole, although it should be noted that 45% of them have a university degree. It is more common to find immigrants from southern and eastern Ukraine among immigrants over the age of 60 than the share of total immigrants from these regions of Ukraine in the total population of respondents would indicate. Only 15% of them reported that they have a very good knowledge of the Polish language. Persons over 60 years of age are significantly more likely than the total immigrant population to reside in Poland with other family members (adult children, siblings, etc.), which probably enables some of them to reside in Poland. This was reported by 52% of immigrants. However, 29% are in Poland on their own.

Age is an important factor in the context of future plans that immigrants may have. Persons aged 60 and over are less likely than the total of respondents to have future plans involving their permanent or long-term residence in Poland (29% want to reside in Poland permanently or for longer), while they have a higher degree of uncertainty about the future (66% of “difficult to say” responses).

Age is a factor that influences immigrants’ expectations with regard to Poland. The persons who are over 60 years of age are interested, in particular, in easier access to health care (33%), easier legalisation of residence (32%) and financial support if they are out of work (27%).

3.3. Expenditure

A change in the nature of residence of pre-war immigrants to a more settled one has triggered an increase in expenditure on so-called day-to-day living. In 2024, the percentage of pre-war immigrants spending half or less of their salaries on so-called current expenses has decreased yet again (36% in 2022, 28% in 2023, 25% in 2024), which may be related to a change in the nature of their residence to a more settled one (**Figure 32**). For refugees, there have been no significant changes in comparison to 2023. Almost 20% of refugees spend no more than half

of their salary on current expenses and 23% of them spend the majority of their salary (90%-100%).

Figure 32. Living expenses as a proportion of the average monthly net salary of migrant workers from Ukraine (employed persons)

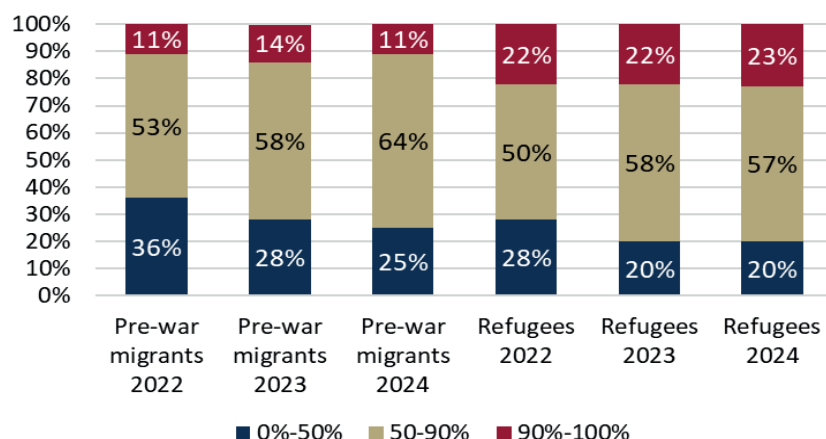


Figure 33. Housing situation of pre-war immigrants in the years 2022-2024

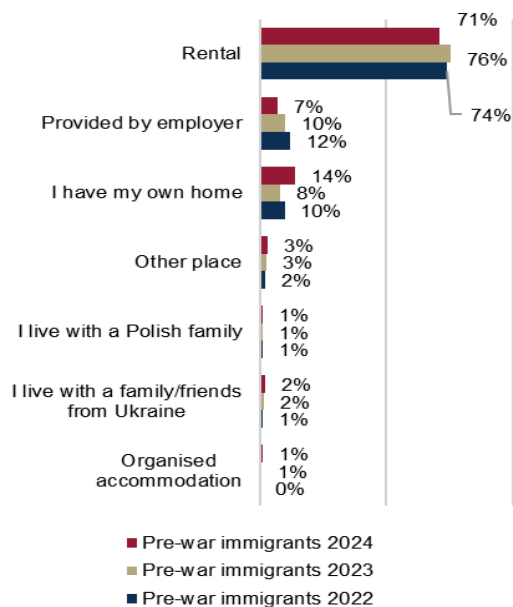
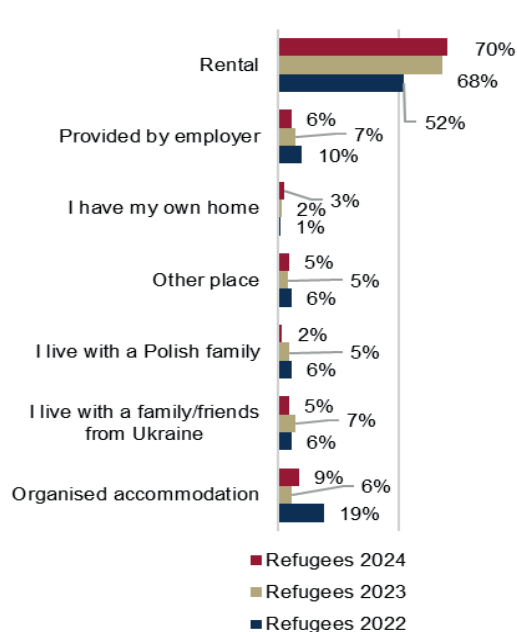


Figure 34. Housing situation of refugees from Ukraine in the years 2022-2024

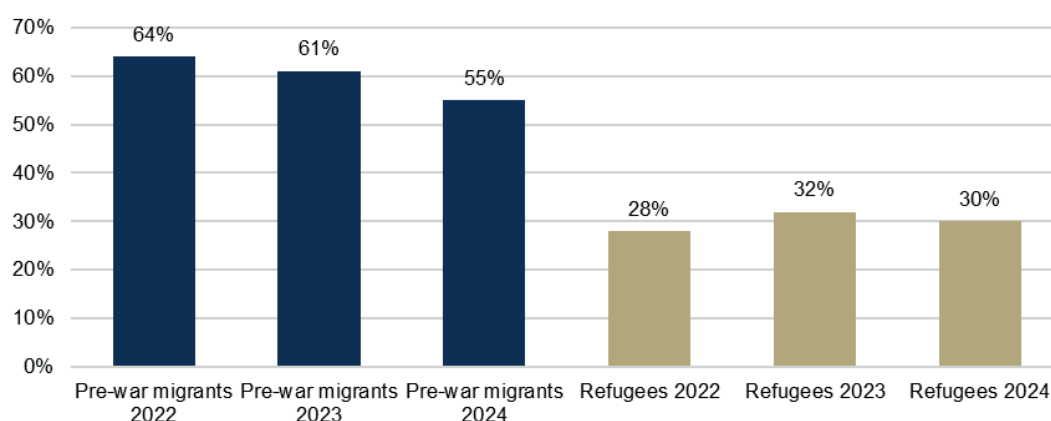


The housing situation of immigrants, especially refugees, has been improving. An increase in the percentage of refugees renting accommodation (70% in 2024) to the level of pre-war immigrants (71%) is noticeable, being one of the signals of the social and economic integration process (**Figure 33 and Figure 34**). The two groups of immigrants differ in terms of the significantly higher proportion of people who own their own accommodation among pre-war immigrants (14% against 3% among refugees) and the share of collective accommodation as a place of residence for refugees (9% against 1% among pre-war immigrants).

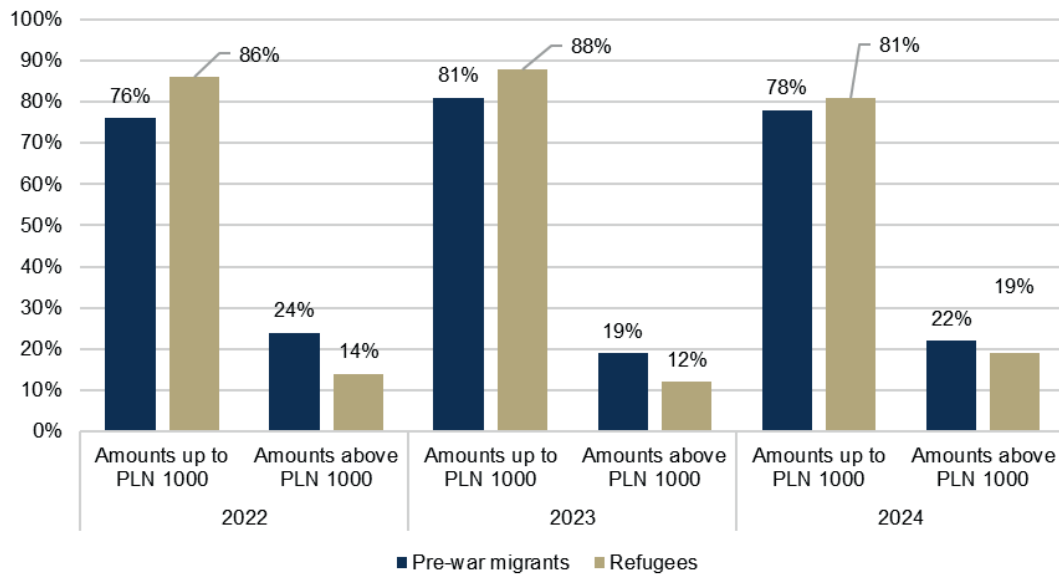
4. Cash and in-kind aid transferred to Ukraine

Immigrants continue to financially support their relatives in Ukraine, although the proportion of pre-war immigrants sending money to Ukraine has been declining. Nearly 40% of immigrants send money to Ukraine (48% in 2023). The percentage of refugees sending funds remains at a level similar to that in the previous years (30%) (Figure 35). The proportion of pre-war immigrants making remittances to Ukraine has therefore been falling. It was 64% of respondents in autumn 2022 and 55% in 2024.

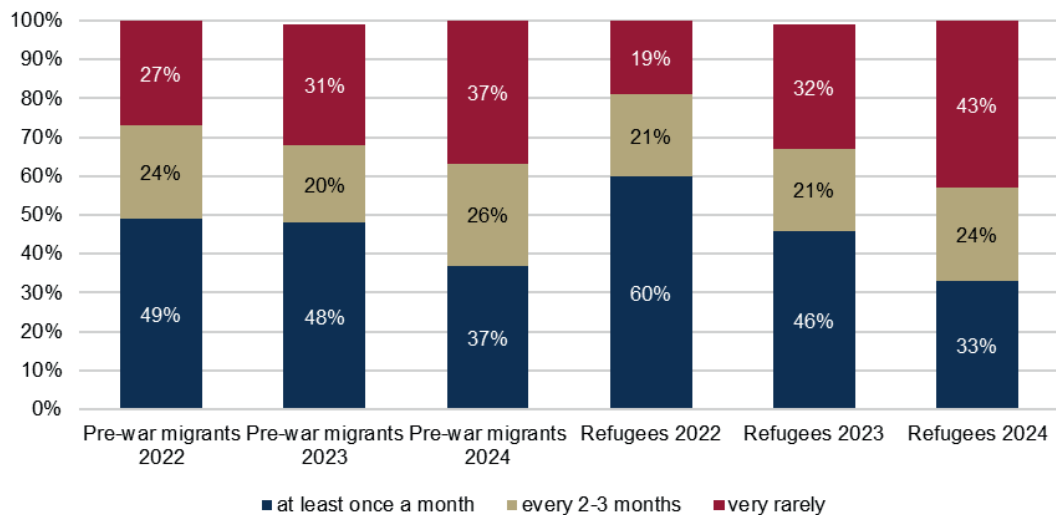
Figure 35. Percentage of Ukrainian migrants making remittances to Ukraine in the years 2022-2024



The propensity to make remittances to Ukraine is correlated with the labour market status. The funds are transferred primarily by people who reported that they have permanent jobs or are self-employed. In terms of the amount of remittances, both groups of immigrants saw an increase from 2023 in the percentage of people who transfer on average monthly amounts of more than PLN 1,000, i.e. from 19% to 22% for pre-war immigrants and from 12% to 19% for refugees (Figure 36).

Figure 36. Amount of the last remittance made to Ukraine

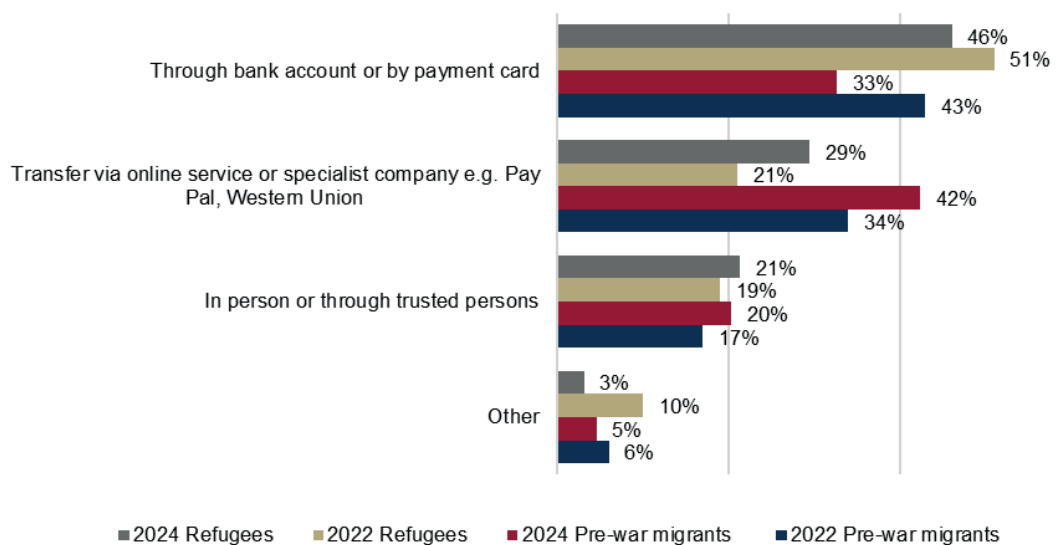
The frequency of remittances to Ukraine in both groups of immigrants has been decreasing. For pre-war immigrants, 49% of them made remittances to Ukraine at least once a month in 2023 and 37% of them in 2024 (Figure 37). For refugees, the decrease was even greater, from 60% to 33%.

Figure 37. Frequency of remittances to Ukraine

Refugees and pre-war migrants make remittances to Ukraine in different ways. Refugees are more likely than pre-war migrants to choose a bank account or payment card (46% of refugees versus 33% of pre-war migrants) (Figure 38). Pre-war immigrants, on the other hand,

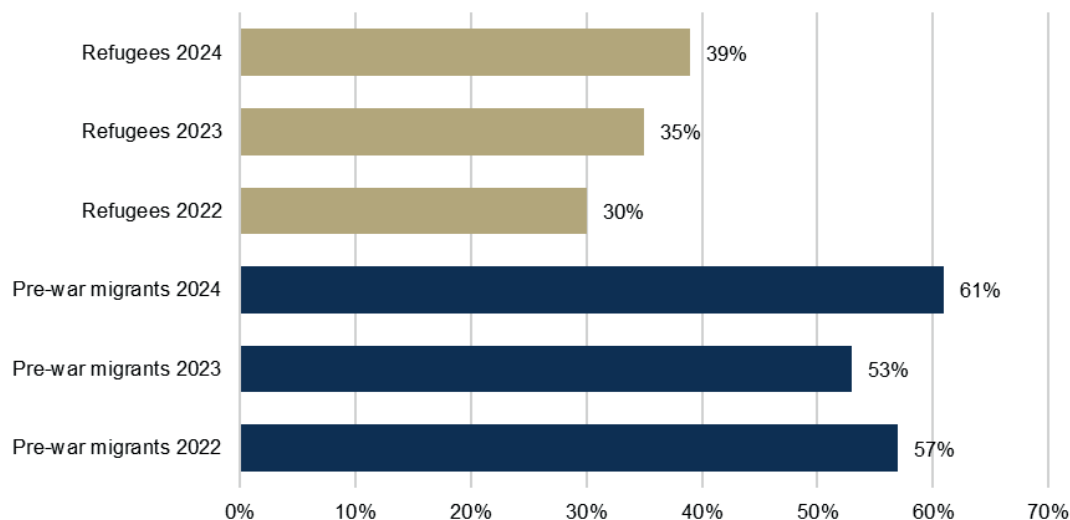
are more likely to make remittances via an online service or a specialist company such as PayPal or Western Union (42% versus 29%).

Figure 38. Most frequently used methods for making remittances to Ukraine



The percentage of immigrants that give in-kind aid to Ukraine has been increasing. Overall, 49% of respondents, of which 39% of refugees and 61% of pre-war immigrants, give in-kind aid. (**Figure 39**). This can be linked to the increasing needs for tangible goods of those receiving in-kind aid and to new opportunities for transporting tangible goods to Ukraine (new transport companies, courier services, etc.). Overall, 49% of respondents, of which 39% of refugees and 61% of pre-war immigrants, give in-kind aid.

Figure 39. Percentage of Ukrainian immigrants who give in-kind aid to Ukraine



As far as the beneficiaries of in-kind aid are concerned, they are mainly family members (**Figure 40**). More than 70% of those giving in-kind aid in both immigrant groups give it to family members. In contrast, the percentage of people who give in-kind aid to charities has been falling (from 38% to 21% for pre-war immigrants and from 45% to 19% for refugees).

Figure 40. Beneficiaries of in-kind aid in Ukraine

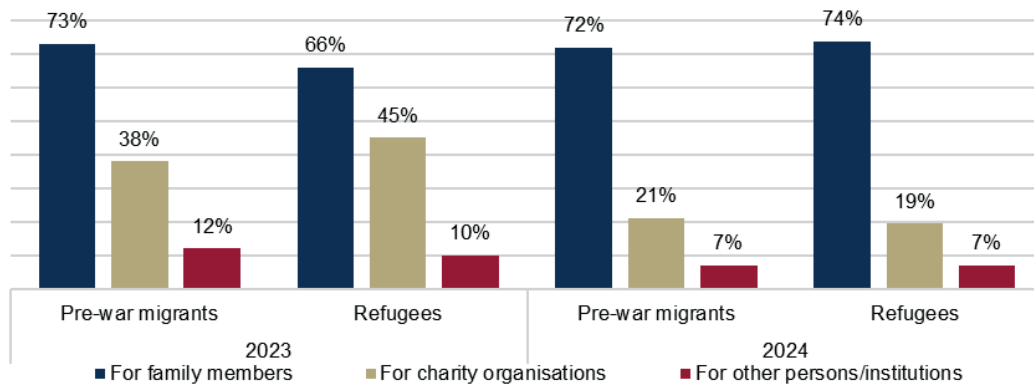
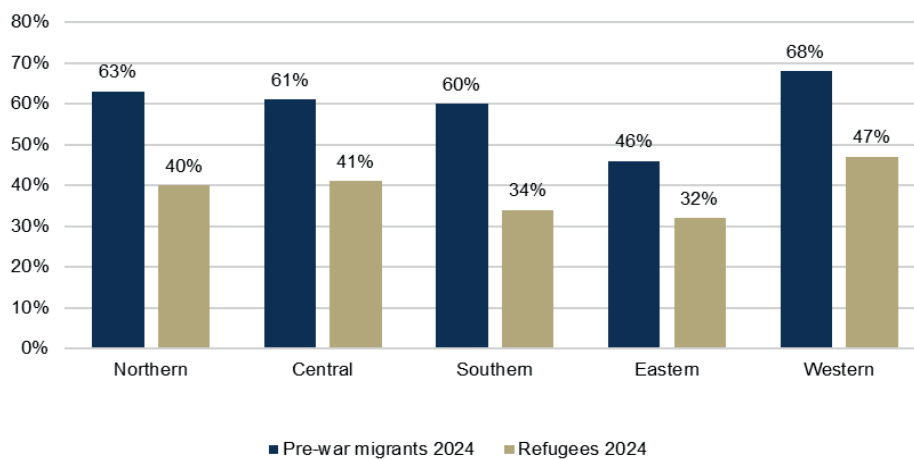


Figure 41. Percentage of Ukrainian immigrants who give in-kind aid to Ukraine, by region of origin of immigrant



Similar to financial aid, in-kind aid is correlated with the labour market status. In addition, it should be noted that in-kind aid is given in both groups of immigrants by Ukrainians from the western part of Ukraine, which is probably due to the territorial proximity of this part of Ukraine and the greater possibilities to provide it with this support. (**Figure 41**). Immigrants from eastern Ukraine, a combat zone, are the least likely to give in-kind aid.

5. Opinions and plans of immigrants from Ukraine

5.1. Immigrants and their future place of residence

For more than two years, immigrants have not significantly changed their views on residing permanently in Poland. In 2024, 48% of pre-war immigrants (48% in 2023 and 55% in 2022) and 21% of refugees (21% in 2023 and 19% in 2022) had such plans. In comparison to preceding years, the percentage of refugees who would not like to reside permanently but would reside for more than one year has been slowly increasing (Figure 42).

Among all immigrants, the already relatively high number of the “difficult to say” responses has been increasing. The prolonged war in Ukraine and the difficulty in assessing the future resulted in the share of these responses rising again in 2024 to 56%, after a slight decrease in uncertainty in 2023 (Figure 42). In previous years it was as follows: 48% in 2023 and 55% in 2022. Uncertainty has also been growing among immigrants who came to Poland before the war, with a 39% share of the “difficult to say” responses in 2024, up from 36% in 2023 and 29% in 2022.

Figure 42. Plans to reside in Poland in the future

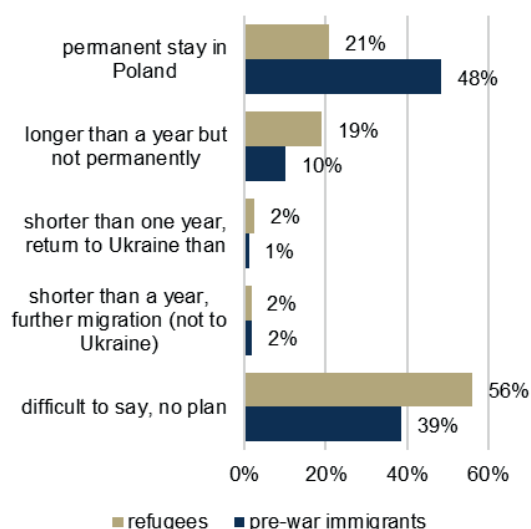
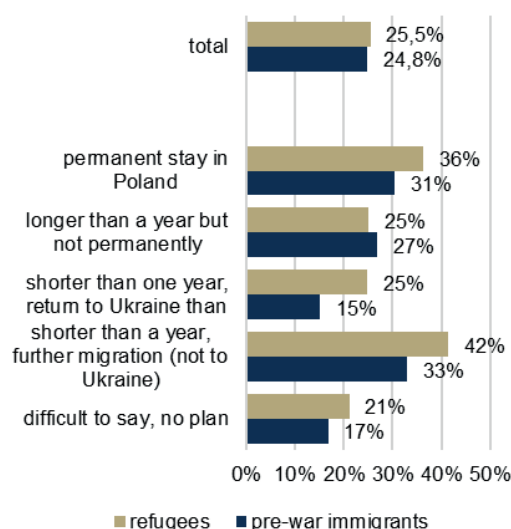


Figure 43. Responses to the question on friends wishing to come to Poland depending on their intended further residence



A small percentage of immigrants in Poland plan to leave within the next year. This is true in relation to both refugees and pre-war immigrants and both to returns to Ukraine and to planned moves to other countries, including Western Europe (Figure 42). The percentage of declarations in each of these categories was less than 2%.

Around 25% of immigrants have friends who want to come to Poland in the near future. Responses depended on the permanence of plans to reside in Poland. On average, such friends were more often mentioned by those who would like to reside in Poland permanently and those who want to move to a country other than Ukraine in the near future (Figure 43). In each response category, refugees were more likely to mention such friends, but this was offset by the fact that most refugees were undecided as to whether they would like to reside in Poland. They also have fewer friends wanting to leave in general.

A quick return to Ukraine, provided the war ends, is mentioned by 60% of refugees. The end of the war could also be a pretext for the more rapid return to Ukraine of around one third of pre-war immigrants (Figure 44). On the other hand, 25% of pre-war immigrants and 17% of refugees do not consider returning to Ukraine at all during the year regardless of the situation. Other responses to the question on potential factors favouring a faster return to Ukraine of those who wanted to reside in Poland longer are consistent in both the refugee and pre-war immigrant groups. Among the most important are the following: missing their family (around 20%), problems with work in Poland (just under 20%), etc.

Figure 44. Factors influencing the decision to return to Ukraine in the current year (for those who reported a longer residence)

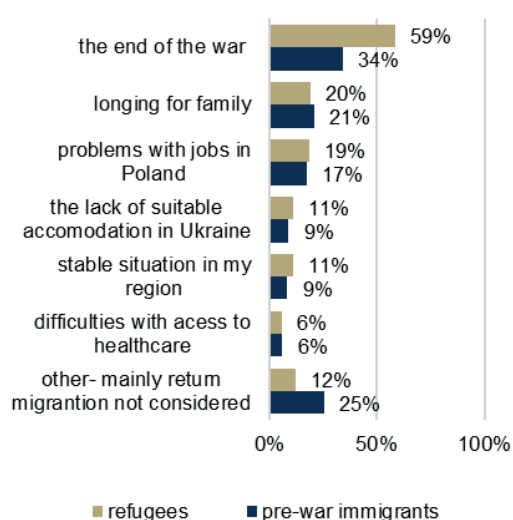
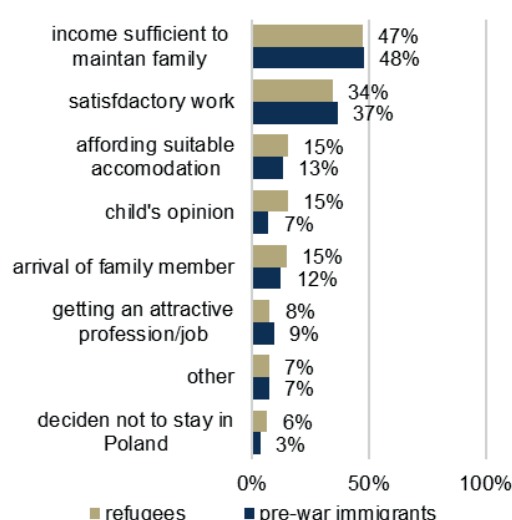


Figure 45. Factors influencing the decision to extend residence in Poland beyond one year (for those who reported a shorter residence)

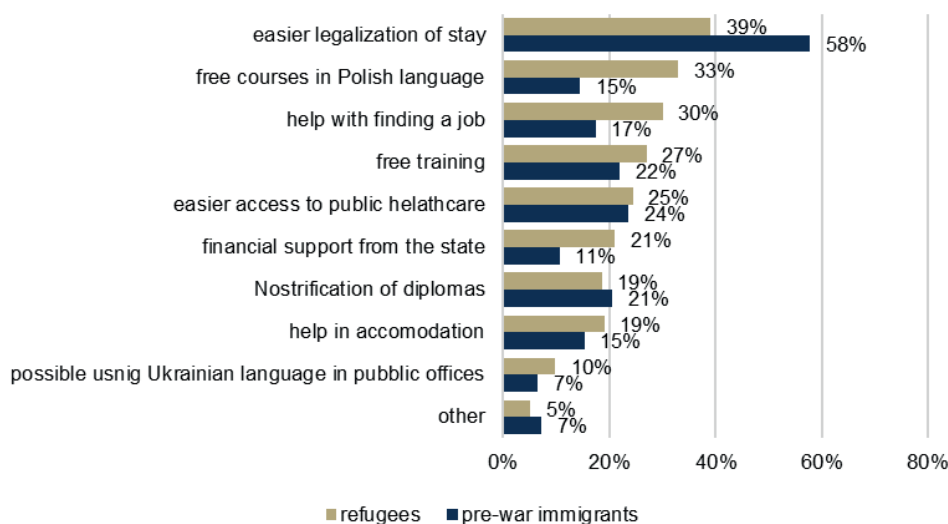


Factors influencing the possibility of residing longer than a year in Poland are the same for all immigrants and include the following: the ability to support oneself and one's family and a rewarding job. The first of these responses was made by just under 50% of respondents. The second by 35% of respondents (Figure 45). Issues related to family situation and housing (arrival of family members, opinion of children, adequate accommodation) were defined as less important, although they were indicated more frequently by refugees.

5.2. Opinions on potential support to immigrants in Poland

The most important from the point of view of Ukrainian immigrants in general is the potential for easier legalisation of their residence in Poland. The question concerning the most important forms of support which in the opinion of respondents would make their residence in Poland easier made it possible to prioritise the needs reported by immigrants (Figure 46). For pre-war immigrants, legalisation of their residence in Poland and potential benefits related to this are unquestionably the most important issue (58% of responses versus 43% the year before). As previous analyses have shown, this group is the most interested in residing in Poland for longer. From the point of view of refugees, it is also the most important issue (39% versus 31% of responses a year earlier), with the majority of respondents not planning to leave Poland in the coming year. Other issues remain almost equally important.

Figure 46. Opinions on the most important forms of support that would facilitate residence in Poland of immigrants from Ukraine



* Up to three responses. Scores do not add up to 100%.

Different rates of economic integration of refugees and pre-war immigrants translate into diversity of their needs. Forced immigrants from Ukraine, in addition to the easier legalisation of their residence, mention almost equally often the following issues: assistance in learning Polish (33%; previous year 32%), assistance in finding a job (30%; previous year 35%) and the opportunity to participate in free training (27%; previous year 17%). The possibility of recognition of diplomas still ranks high (around 20% of responses from refugees and pre-war immigrants, similarly to the situation a year ago). These observations testify to refugees' desire to improve their position on the Polish labour market even if they do not plan to reside in Poland permanently (Error! Reference source not found.).

The social needs of immigrants in Poland are not declared as the most important ones. Immigrants are adapting to Polish circumstances. More than two years after the commencement of the full-scale war in Ukraine, responses such as assistance in finding accommodation, financial support for those out of work or access to health care are mentioned relatively less frequently. The handling of formal issues in Ukrainian was the least frequently chosen response. Immigrants seem to have learned to function in the Polish reality to such an extent that such issues are not perceived as crucial (Error! Reference source not found.).

6. Specific elements of regional differentiation among immigrants from Ukraine in Poland

The majority of immigrants in all voivodeships are female. Migration of Ukrainians to Poland differs in terms of territorial and demographic characteristics. The predominance of women is evident in all the voivodeships analysed (Figure 47). The highest ratio of women to men (81% and 78% respectively) was in the Kujawsko-Pomorskie Voivodeship and in the Podlaskie Voivodeship.

Figure 47. Gender structure of immigrants in voivodeships

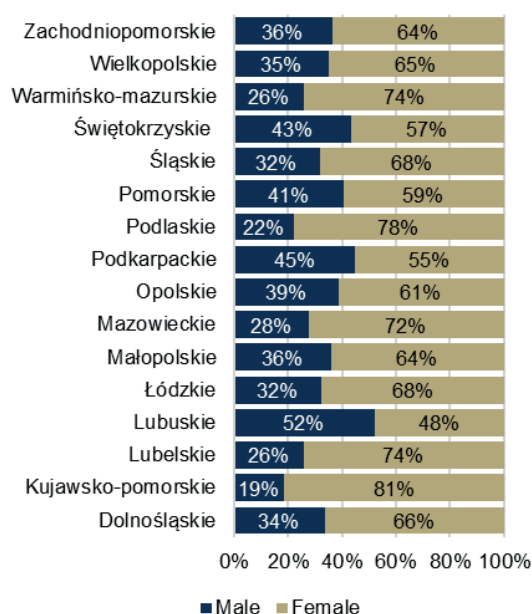
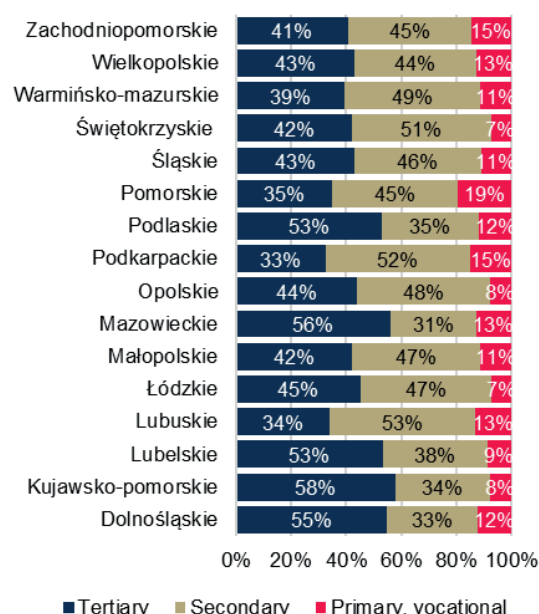


Figure 48. Educational structure of immigrants in voivodeships

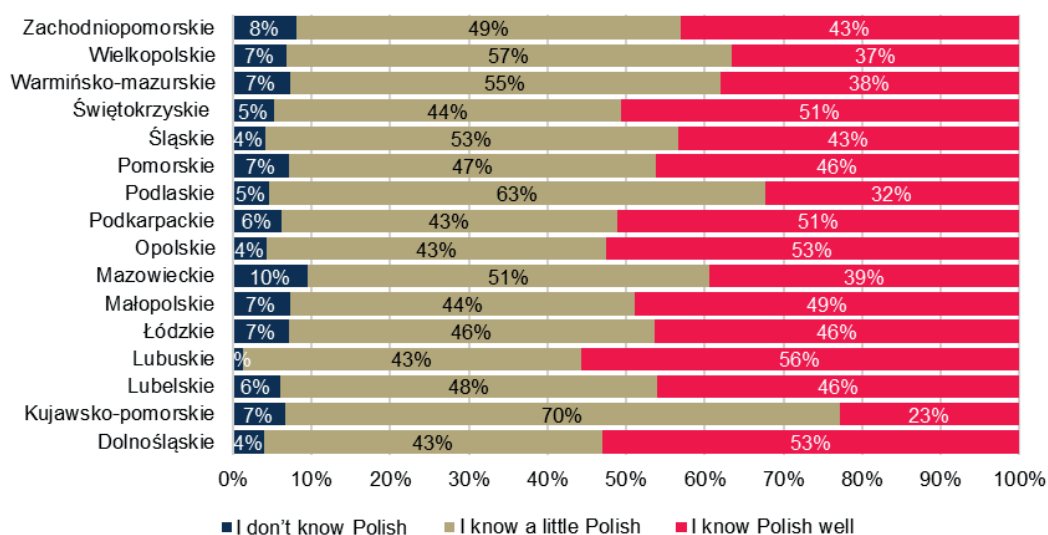


Immigrants from Ukraine living in Poland are distributed unevenly in terms of education. The highest concentrations of people with a university degree can be found in the Kujawsko-Pomorskie Voivodeship and in the Mazowieckie Voivodeship (58% and 56% respectively) (Figure 48). In turn, the largest number of people with primary or vocational education could be found in the Pomorskie Voivodeship (19%).

The highest percentage of immigrants with a very good knowledge of Polish was in the Dolnośląskie Voivodeship and in the Lubuskie Voivodeship. Despite having a high percentage of people with a university degree, the Kujawsko-Pomorskie Voivodeship was the voivodeship with the smallest percentage of Ukrainian migrants declaring a good knowledge of the Polish language (23% of responses given by respondents) (Figure 49). In turn, the regions

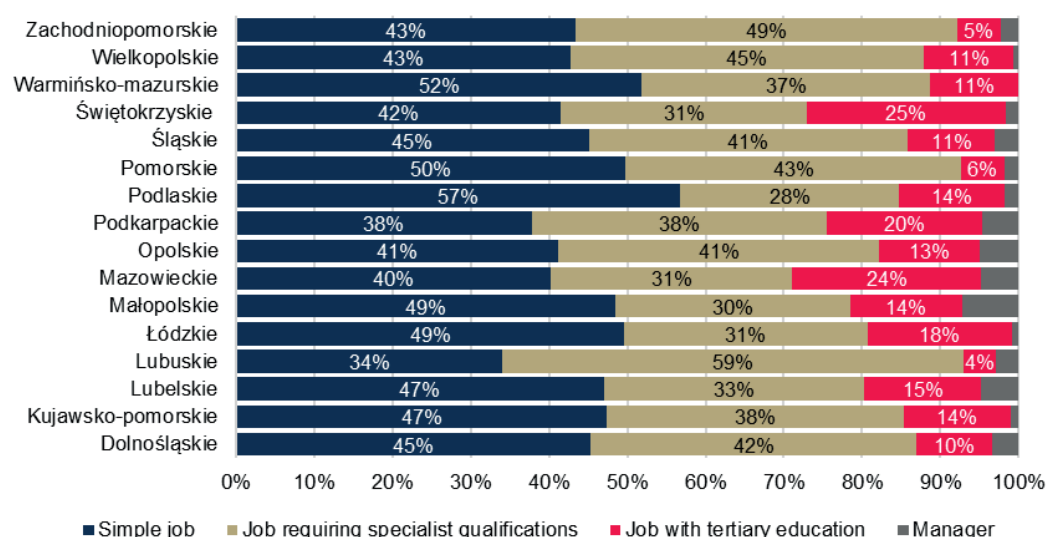
with the best knowledge of the Polish language among Ukrainians are the Lubuskie Voivodeship and the Dolnośląskie Voivodeship.

Figure 49. Polish language fluency, by voivodeship



The type of work performed by Ukrainians in Poland has a significant impact on their economic situation and quality of life. It has a direct impact on salaries, job stability and career prospects. The analysis of the type of work performed by Ukrainians in Poland demonstrated moderate regional differentiation.

Figure 50. Type of work performed in Poland, by voivodeship

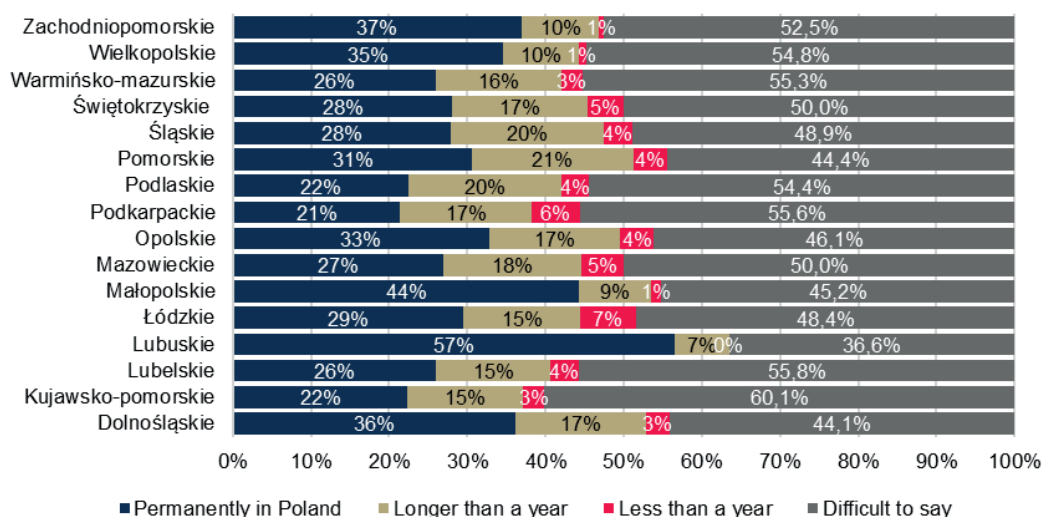


Respondents in the Świętokrzyskie Voivodeship (25%) and in the Mazowieckie Voivodeship (24%) were most often employed in jobs requiring a university degree (Figure 50). In these

voivodeships, respondents were most often employed in industry, mostly in factories (18.7% in the Świętokrzyskie Voivodeship and 16.7% in the Mazowieckie Voivodeship). In and near Warsaw, respondents were employed not only in industry, but also quite often in the IT sector (12.6%). In the Lubuskie Voivodeship, most people were employed in jobs requiring specific skills (59%). In the Podlaskie Voivodeship, on the other hand, the highest percentage of respondents were employed in simple jobs (57%). Similarly to the Świętokrzyskie Voivodeship and to the Mazowieckie Voivodeship, jobs were performed predominately in industry. In the Dolnośląskie Voivodeship, commonly recognised as a hub for large IT companies, the number of Ukrainian citizens employed in the IT sector was relatively low, as only 2.7% of responses referred to this sector. In this edition of the survey, however, the highest percentage of responses given by respondents working in the IT sector was recorded in the Małopolskie Voivodeship (8.6%).

The prospect of remaining in Poland is an important indicator of intentions and future life plans of immigrants. More than half of Ukrainian respondents, regardless of the voivodeship, reported difficulties in determining the length of their residence in Poland (**Figure 51**). Respondents in the Lubuskie Voivodeship (57%) and, to a slightly lesser extent, in the Małopolskie Voivodeship (44%) most frequently had long-term plans for residing in Poland. It is comforting to point out that in the majority of voivodeships the percentage of people who planned a short-term stay in Poland was marginal. The highest percentage of such responses was given in the Łódzkie Voivodeship (7%) and in the Podkarpackie Voivodeship (6%).

Figure 51. Planned residence in Poland, by voivodeship



7. Annex. Description of the survey method

The survey among immigrants from Ukraine was conducted between 6 May 2024 and 5 July 2024 by the NBP Regional Branches in all voivodeships. The survey was carried out using the PAPI method (paper questionnaires completed by respondents) with the use of a questionnaire translated into Ukrainian, Russian and Polish.

The survey focused on adult immigrants from Ukraine (persons aged 18 and over), both pre-war immigrants and refugees. Due to the need to obtain a minimum size of each migrant group for the analyses, it was assumed that the proportion of people in each group should be no less than 30% of the sample size provided for each NBP Regional Branch. It was assumed that refugees are persons registered in the PESEL-UKR register or unregistered but who arrived in Poland for the first time for purposes other than tourism no earlier than 2022. Other persons were regarded pre-war immigrants.

In order to make sure that the survey was well represented, the questionnaires were collected in 16 voivodeship cities of Poland, as well as in towns outside the voivodeship city (35% of the sample taken). In addition, it was assumed that in each of the voivodeships respondents would be recruited in at least four of the eight listed categories of places (e.g. companies, offices, at random, immigrant organisations, collective accommodation points, etc.). It was assumed that the percentage of respondents in each location should not exceed 30%. In addition, it was assumed that when selecting participants in the survey, it was important to avoid selecting too many people at the same location (e.g. one person per family, no more than five people working in the same company). A total of 3,778 questionnaires were collected. 40% of these relate to pre-war immigrants, 60% to refugees.

In order to improve the representativeness of the survey, the results were weighted by PESEL-UKR proportions for each voivodeship.

The survey was carried out by employees of NBP Regional Branches. The survey was conducted thanks to the cooperation of various institutions, including the Polish authorities, companies and social organisations helping to recruit respondents.

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