

RESEARCH
SURVEY
2023

Berlin-Warszawa-Express

FROM POLAND TO GERMANY

NEW TRENDS IN UKRAINIAN REFUGEE MIGRATION

The report from the survey conducted by the EWL Migration Platform, the Centre for East European Studies at the University of Warsaw and the Foundation for the Support of Migrants on the Labour Market 'EWL', commissioned by the Chancellery of the Prime Minister of the Republic of Poland.



TABLE OF CONTENTS

Introduction	03
Key findings	04
Respondent profile	06
Children and family	08
Stay in Poland and Germany	09
Integration in Poland and Germany	10
Labour market participation in Poland and Germany	11
Financial situation in Germany	13
Plans and perspectives	14
Methodology	17
Expert opinions	18
Comments	19
Partners of the study	21
Authors of the study	22
EWL Migration Platform and the Centre for East European Studies UW reports	23



Andrzej Korkus

*EWL Group CEO
Chairman of the EWL Foundation*

It has now been a year and a half since the Russian attack on Ukraine. During this time Poland has become home to more than 1.4 million refugees who have found shelter and employment. The dynamics of refugee migration has had a significant impact on the Polish labour market – over 70% of adult Ukrainian refugees took up employment, contributing to the growth of Polish GDP by more than 1 percentage point.

Poland, as Ukraine's border country, naturally became the first stop for refugee migration. However, with the passage of time, this picture of migration has experienced some transformations. The mass departure of Ukrainian economic migrants from Poland to Germany was already talked about before the war, and some Ukrainian refugees came to Poland with this intention from the very beginning. We observed this already in the first weeks of the war at the Mother and Child Point, set up by the EWL Foundation at Warsaw's Zachodni Railway Station. However, it is only in the recent months that more than 350,000 refugees have decided to leave Poland for various reasons. Mainly to continue their journey to the West, mostly to Germany, where the number of Ukrainian refugees has risen to 1.1 million people.

As part of our survey carried out jointly with the Centre for East European Studies at the University of Warsaw, we decided to analyse the motivations of Ukrainian refugees who were staying in Poland and then decided to change their country of residence.

I believe that the conclusions of the report will allow the Polish authorities and Polish employers to develop effective solutions to keep refugees in the country or to encourage them to return to Poland.

I am convinced that this analysis will also be a valuable source of knowledge for German entrepreneurs who are looking for ways to make full use of the professional potential of Ukrainian citizens, as well as a compass for Ukrainian authorities who are grappling with the challenge of how to effectively motivate refugees to return to their homeland after the war has ended.

I sincerely hope that the results of our report will contribute to a constructive discussion and cooperation between all involved, helping to create effective strategies for the future.

I invite you to read the report.

A handwritten signature in black ink, appearing to read 'Korkus'.



Jan Malicki, Dr H.C.

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

After 24 February 2022 Poland became the country of first choice for refugees from Ukraine fleeing the war. This choice was determined primarily by its geographical, cultural and linguistic proximity, which undoubtedly favoured the establishment of relations on Polish soil. Thanks to a simplified procedure for access to the Polish labour market, which was adopted in the first weeks after the Russian invasion, we managed to enable several hundred thousand Ukrainians to take up employment.

It turned out, however, that it was not enough to keep the newcomers in Poland. In the middle of last year, a previously unknown phenomenon was observed – refugees started to leave Poland, continuing on to Western Europe, especially Germany. In light of these events, an interesting and thought-provoking question has arisen – is this a temporary phenomenon or does it herald a new trend that will continue and may even deepen?

That is why it is essential to study this phenomenon. An analysis of its causes and effects is in the interest of Poland – not only of the Polish state, but also Polish employers, who may be affected by changes in the labour market.

The report that I recommend to your attention today, together with the experts from the EWL Migration Platform, is one of the first studies which pays special attention to the new migration route “Kiev – Warsaw – Berlin”. It is worth reflecting on what factors influenced the refugees to move between Poland and Germany, as well as what the social or economic consequences of such refugee flows might be.

It is my hope that the results of the survey will be of significance for shaping the future of migration policy and will contribute to understanding and, consequently, to responding appropriately to the new challenges posed by the contemporary world of migration.

Enjoy your read.

A handwritten signature in black ink, appearing to read 'J. Malicki'.

NEW TREND IN MIGRATION OF UKRAINIANS

Over the past year there has been a visible change in the direction of the migration flows of Ukrainian refugees. Poland, which for many years was the main destination country for migrants from Ukraine seeking employment as well as shelter in the European Union, has experienced a significant outflow of citizens of this country in the face of a new migration trend. **According to Eurostat data, since August 2022 the number of Ukrainians under temporary protection has increased in 21 EU member states. The largest inflows were recorded in Germany (more than 410,000 peoples), Romania (more than 70,000 people) and Italy (over 40,000 people). In contrast, the number of Ukrainian citizens under temporary protection has decreased in six EU countries, including Czechia (almost 50,000 people), France (almost 5,000 people) and Sweden (more than 2,000 people). Nevertheless, the largest outflow of Ukrainian refugees concerns Poland – more than 350,000 people.**

350,000

Ukrainian refugees have left Poland since August 2022

43%

of respondents moved from Poland to Germany mainly because of friends and acquaintances in that country

REASONS FOR MIGRATION OF UKRAINIAN CITIZENS ARE UNCHANGING

An important reason determining the migration of Ukrainian refugees from Poland to Germany are recommendations from friends. 43% of those surveyed decided to move to Germany based on the experiences and recommendations of relatives who had already settled in Germany. **This coincides with the previous trend of economic migration of Ukrainian citizens, where it was the recommendations from friends that were the main motivation for the choice of the migration country for economic purposes. However, material factors play an important role in this migration too.** Germany is able to offer more attractive social benefits (42%) and higher pay (27%), as well as the possibility to accumulate more savings when living in that country (38%), which directly influences the decision of Ukrainian refugees. Consequently, moving to Germany gives the refugees better opportunities for professional and personal development.

POLAND – GERMANY: DIFFERENCES IN THE INTEGRATION OF REFUGEES

In Germany, a key role in the integration process of refugees is played by German language courses, which are the basis for facilitating communication and understanding of the culture of the host country. In Poland in contrast, refugees focus on establishing contacts with the local community, which already in the first days of the war showed great openness and willingness to help. In addition, refugees were keen to integrate at their workplace. Research shows that as many as 84% of refugees integrated in Poland, compared to 99% in Germany. It is worth noting that most of the 16% of non-integrating respondents stayed in Poland for less than 1 month, which may explain their lack of integration.

99%

of respondents declare that they are undergoing the integration process in Germany

59%

of Ukrainian refugees who left Poland for Germany did not take up employment in Poland

MAINLY REFUGEES WHO DID NOT WORK IN POLAND WENT TO GERMANY

According to the survey, employment in Germany was taken up by 31% of Ukrainian refugees who arrived from Poland, but as many as 46% expressed a desire to take up work in the near future. This data shows that Ukrainian citizens want to support themselves and not rely solely on social benefits or family support. The situation in Poland looks slightly different for the same group of migrants – 41% were working in our country before moving to the West (previous studies showed that out of the total group of refugees staying in Poland as many as 71% of respondents took up employment). However, it should be noted that a significant proportion of those leaving Poland for Germany were people who did not take up any employment in Poland. Despite their willingness to start working, some refugees do not take up employment in Germany because of not speaking German, receiving sufficient means of subsistence from social benefits or because of financial support from their family.

MORE THAN A THIRD OF REFUGEES CURRENTLY STAYING IN GERMANY WILL NOT RETURN TO POLAND

Nearly 35% of those surveyed expressed a desire to stay in Germany for the long term, with 9% declaring their intention to settle there permanently. The main motivating factors for staying in Germany are, among others, the possibility of finding satisfactory employment and the prospect of obtaining a permanent residence permit. **Only 13% of Ukrainian refugees who came to Germany from Poland would consider returning to Poland. An interesting fact from the point of view of the future of the Polish labour market is that almost half (49%) of the refugees who have left Poland for Germany are still undecided about the possible return to Poland. Among the reasons that could convince them to return to Poland are the possibility of finding better employment, higher pay and lack of attractive job offers in Germany.**

38%

of respondents do not consider returning from Germany to Poland

WHAT MOTIVATES REFUGEES TO RETURN TO UKRAINE AFTER THE WAR?

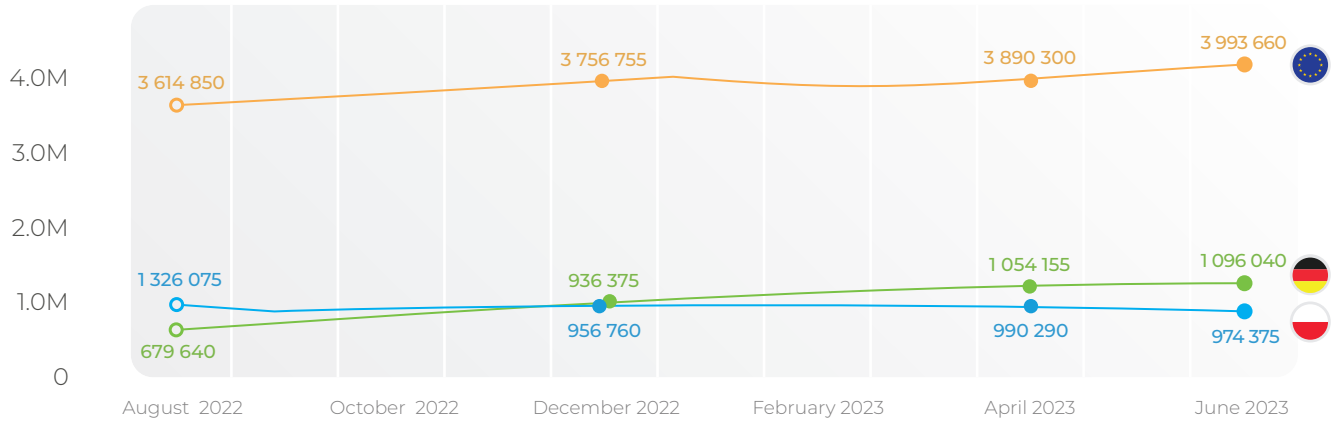
Research indicates that 39% of Ukrainian citizens currently living in Germany are considering returning to their homeland in the near or distant future. The motivating factors for their return can be divided into four main categories: the realisation of Ukraine's civilisational choice (real prospect of NATO and EU membership), social factors (the possibility of reuniting with family who have remained in Ukraine), economic factors (increased levels of remuneration and improved working conditions, as well as tax reliefs and cheap loans for the returnees) and political factors (implementation of a number of reforms, particularly in the field of the fight against corruption).

39%

of respondents declare their intention to return to Ukraine in a longer or shorter perspective

Number of Ukrainian citizens receiving temporary protection in Germany and Poland (August 2022 – June 2023)

Data: Eurostat

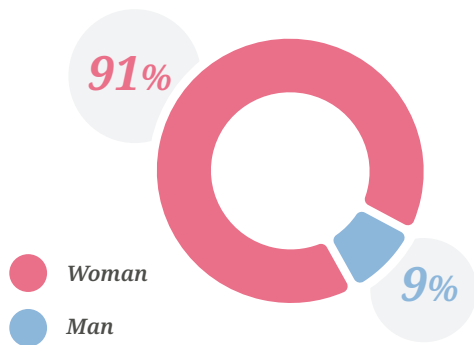


By more than
410,000
 increased the number of refugees from Ukraine under temporary protection in Germany

By more than
350,000
 decreased the number of refugees from Ukraine under temporary protection in Poland

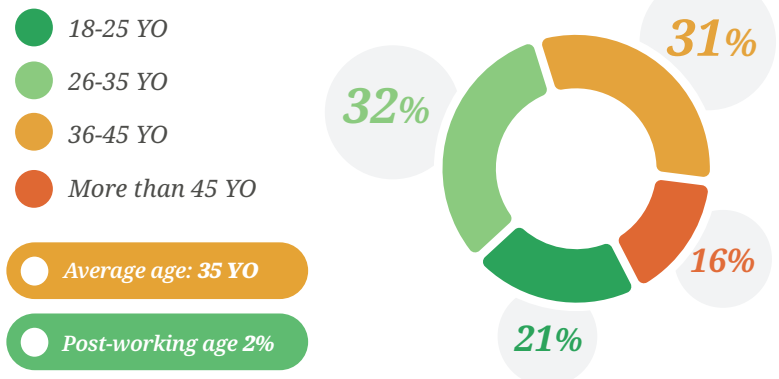
Gender

N=400



Age

N=400



This report examines the group of refugees from Ukraine who came to Poland after the outbreak of the war, received the status of temporary protection (assignment of the PESEL UKR number) and then left for Germany obtaining there an analogous status (vorübergehender Schutz), thus losing temporary protection in Poland.

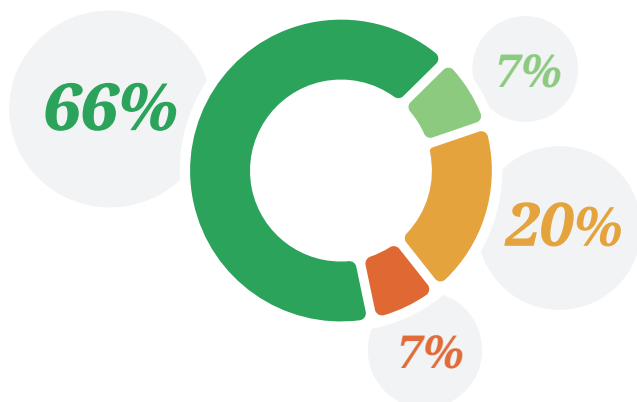
When analysing the demographic profile of the study participants it should be noted that the surveyed group is dominated by women (91%). One of the main factors that influenced this disproportion was a ban on Ukrainian men

of conscription age (18 to 60, with some exceptions) to leave Ukraine.

The survey shows that more than half of the respondents (53%) were under 35 years old, indicating that young people are most likely to leave for Germany, being more mobile and willing to take up employment. Only 2% of Ukrainian refugees are of the post-working age. Almost every third respondent (31%) is 36-45 years old and the average age of Ukrainian refugees who left Poland for Germany is 35 years old.

Education

N=400



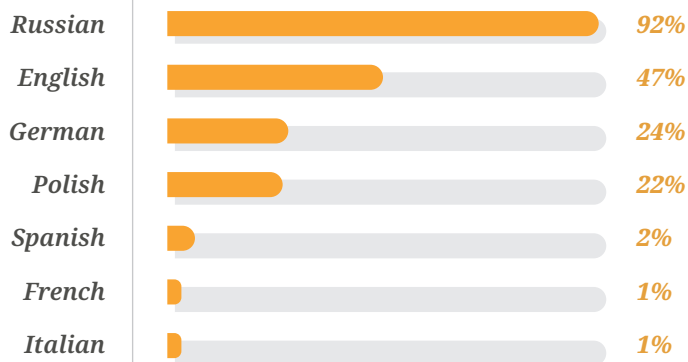
73%
 of Ukrainian refugees who left Poland for Germany have a university degree or incomplete higher education

- University degree
- Incomplete higher
- Vocational
- Secondary

Which of the languages listed do you know at least at a communicative level?

(multiple responses possible)

N=400



24%
 of respondents declare knowledge of German at least at a communicative level

The percentage of Ukrainian citizens with a university degree and incomplete higher education is almost 73%. It is noteworthy that in the case of the previous studies, the percentage of Ukrainian refugees staying in Poland with a university degree and incomplete higher education was similar – 69%. It is valuable information in the context of professional activation of refugees.

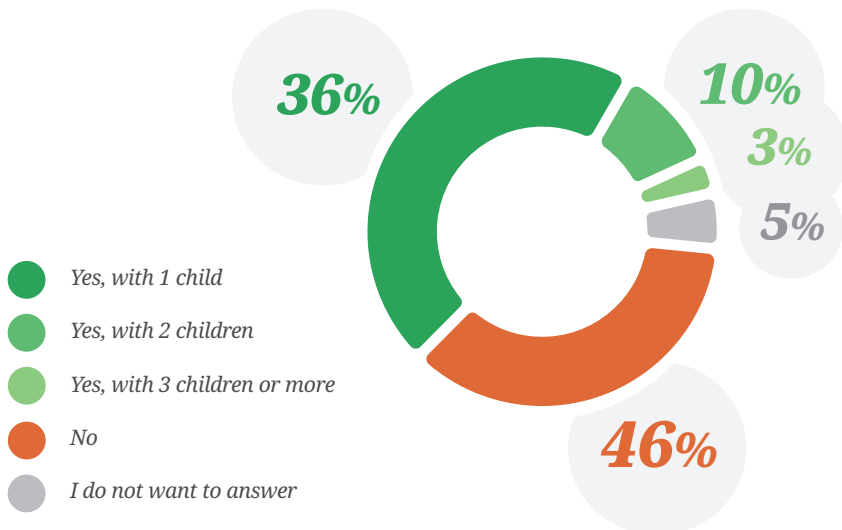
Professional experience and the diversity of skills that Ukrainian citizens possess could enrich the local labour

market and accelerate the economic development of host countries.

Almost every second refugee from Ukraine (47%) declares English language skills at least at a communicative level. In addition, one in four refugees (24%) confirm their knowledge of German, and 22% speak Polish. Knowledge of German among the refugees from Ukraine is one of the reasons for migrating to Germany.

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

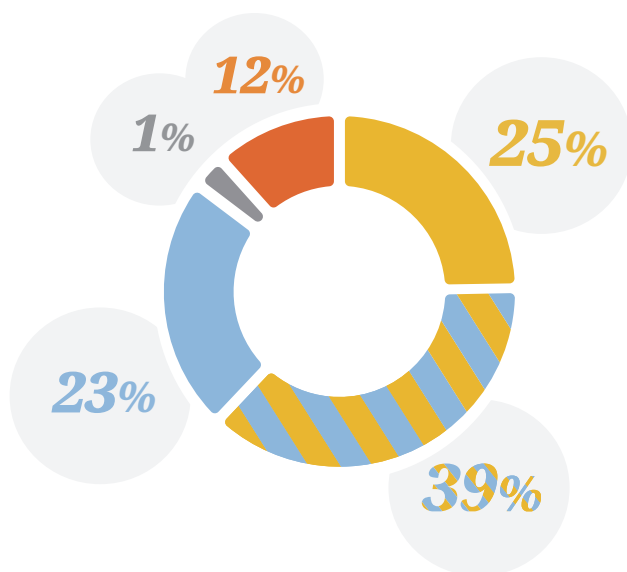
N=400



49%
of Ukrainian refugees came to Germany from Poland with their children

Which education system do your children use while staying in Germany?

(among respondents who came with children, multiple responses possible) N=195



64%
of respondents declare their children benefit from the German education system

- German
- Ukrainian
- Both
- Neither
- Another country's education system

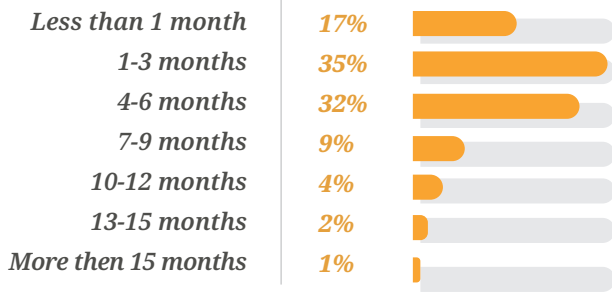
36% of respondents came to Germany with one child and one in ten with two children. It is worth adding that in the previous studies by EWL and the Centre for East European Studies UW almost 66% of Ukrainian refugees came to Poland with children.

It is noteworthy that 99% of respondents declared that their children were studying while in exile in Germany. 62% of refugees declare that their children benefit from the

Ukrainian education system, which indicates that they do not want to lose their ties with Ukraine and will most likely want to return to their country. In contrast, 64% of refugees declare that their children benefit from the German education system, which is an indication that they want to integrate in Germany. Almost 40% use both education systems and 12% study in the system of other countries, including, most likely, Poland.

How long did you stay in Poland during the war?

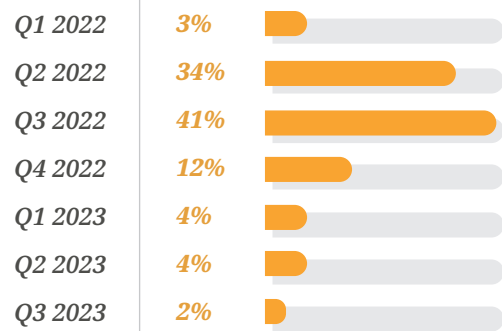
N=400



Average length of stay in Poland: 4 months

When did you arrive in Germany during the war?

N=400



What had the greatest impact on your decision to move from Poland to Germany?

(multiple responses possible)

N=400



27%

of respondents declare that the main reason for leaving Poland for Germany was to find a job with higher pay

More than half of Ukrainian refugees (52%) moved from Poland to Germany within the 1st and 3rd month of their stay in Poland. Almost every third respondent (32%) spent in Poland between 4 and 6 months. In contrast, only 16% of Ukrainian citizens stayed in Poland for more than half a year and 17% stayed for less than 1 month. The average length of stay in Poland of the respondents before moving to Germany is 4 months.

The study showed that the largest migration of Ukrainian refugees from Poland to Germany took place in the 3rd quarter of 2022. It concerned as many as 41% of respondents and was most likely triggered by the spread of information that from 1 June 2022 refugees from Ukraine would receive in Germany benefits similar to those received by eligible German citizens (unemployment or social benefits).

In contrast, 34% of Ukrainian refugees decided to leave for Germany in Q2 2022. In 2023, a total of 10% of those surveyed moved from Poland to Germany.

Research shows that social factors had the greatest influence on the decision to move from Poland to Germany, i.e., having friends and acquaintances in Germany (43%). Material factors also played an important role, i.e., more attractive social benefits (42%), the possibility to accumulate more savings (38%) and job offers with higher pay (27%). In turn, 26% of respondents decided to leave Poland because of better prospects for their children in Germany. Only for 16% of Ukrainian citizens the main reason for further migration was the feeling of greater safety in Germany than in Poland.

How did you integrate in Poland?

(multiple responses possible) N=400



How do you integrate in Germany?

(multiple responses possible) N=400



84% of respondents integrated during their stay in Poland

99% of respondents integrate during their stay in Germany

The survey showed significant differences in the ways of integration of Ukrainian refugees in Poland and Germany. 34% of respondents integrated in Poland through contacts with the local community. But it is worth noting that one in three refugees (33%) integrated at their workplace.

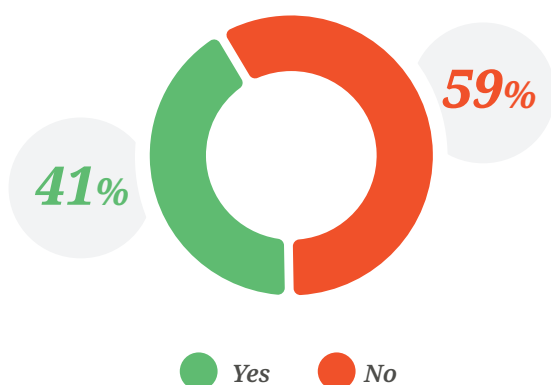
In contrast, 16% of respondents admitted that they did not integrate during their stay in Poland. However, most of the 16% of non-integrating respondents stayed

in Poland for less than 1 month, which may explain their lack of integration.

More than half of Ukrainian refugees (52%) integrate in Germany by attending language courses and 43% through contacts with the local community. Ukrainian citizens in Germany, more often than in Poland (8%), establish contacts with parents of children in schools or kindergartens (23%). Only 1% of respondents declared that they did not integrate during their stay in Germany.

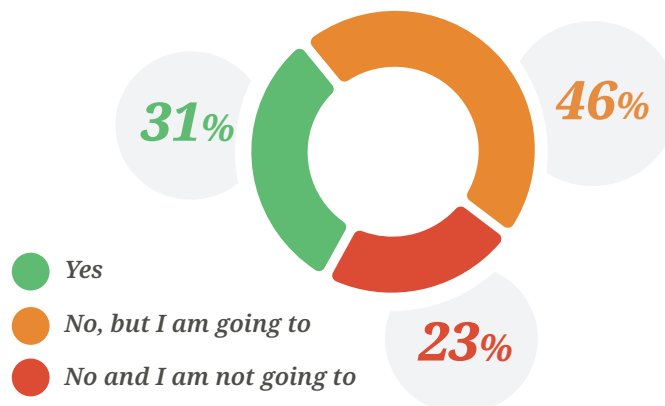
Did you work in Poland after the outbreak of war?

N=400



Are you currently working in Germany?

N=400

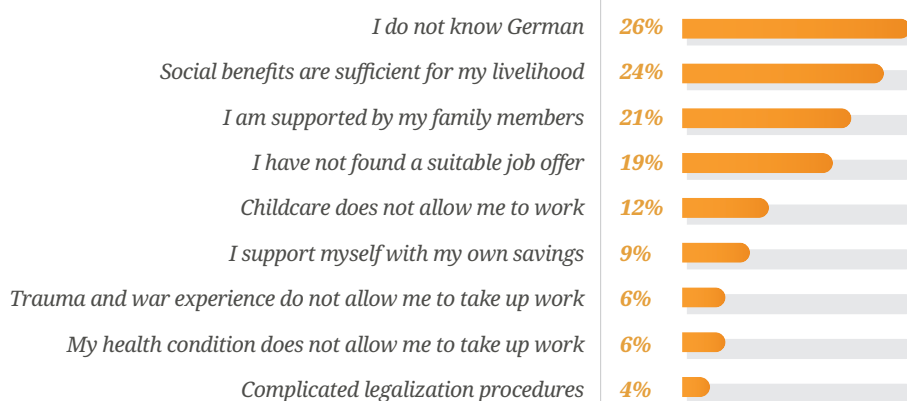


Why is it that you do not work in Germany?

(among respondents who do not work, multiple responses possible) N=276

77%
of respondents are already working or planning to take up employment in Germany

26%
of employed respondents declare that they do not work in Germany due to their lack of knowledge of the German language



41% of Ukrainian refugees who left Poland for Germany took up work in Poland after the outbreak of the war. Let us recall that according to our recent research, as many as 71% of the total of refugees in Poland took up employment. This fact suggests that those refugees left Poland for Germany who did not take up work in Poland.

The survey showed that 31% of Ukrainian refugees had already found employment in Germany and 46% were planning to take up work in Germany. This is a positive signal for the German labour market, indicating that Ukrainian citizens want to support themselves in the country and not only take advantage of the social benefits they are entitled to.

No knowledge of German and high social benefits are the main barriers to the professional activation onto the

labour market of Ukrainian refugees who have come to Germany from Poland. Nearly one in five (19%) respondents has not found suitable employment. In turn, 12% of respondents declare that childcare prevents them from taking up work. In this context, it is worth bearing in mind that more than 90% of respondents are women, half of whom came to Germany with children.

Almost 10% of respondents admit that they do not take up work because they are able to support themselves with their own savings.

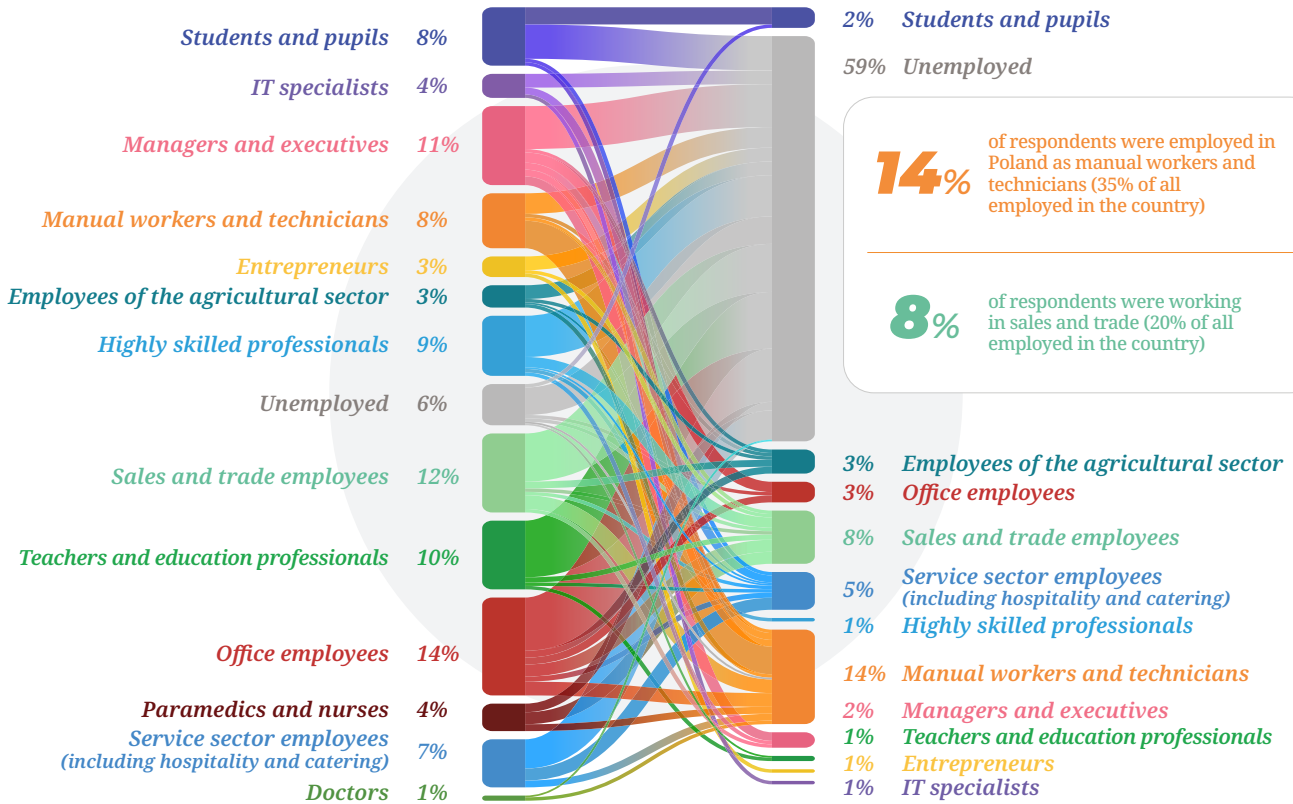
On the other hand, 6% of respondents declared that they could not take up employment due to health reasons or trauma and war experiences. Only 4% indicated complicated legalization procedures as an obstacle for participating in the German labour market.

What was your job while working in Ukraine?

N=400

What profession do you have in Poland after the outbreak of the war?

N=400

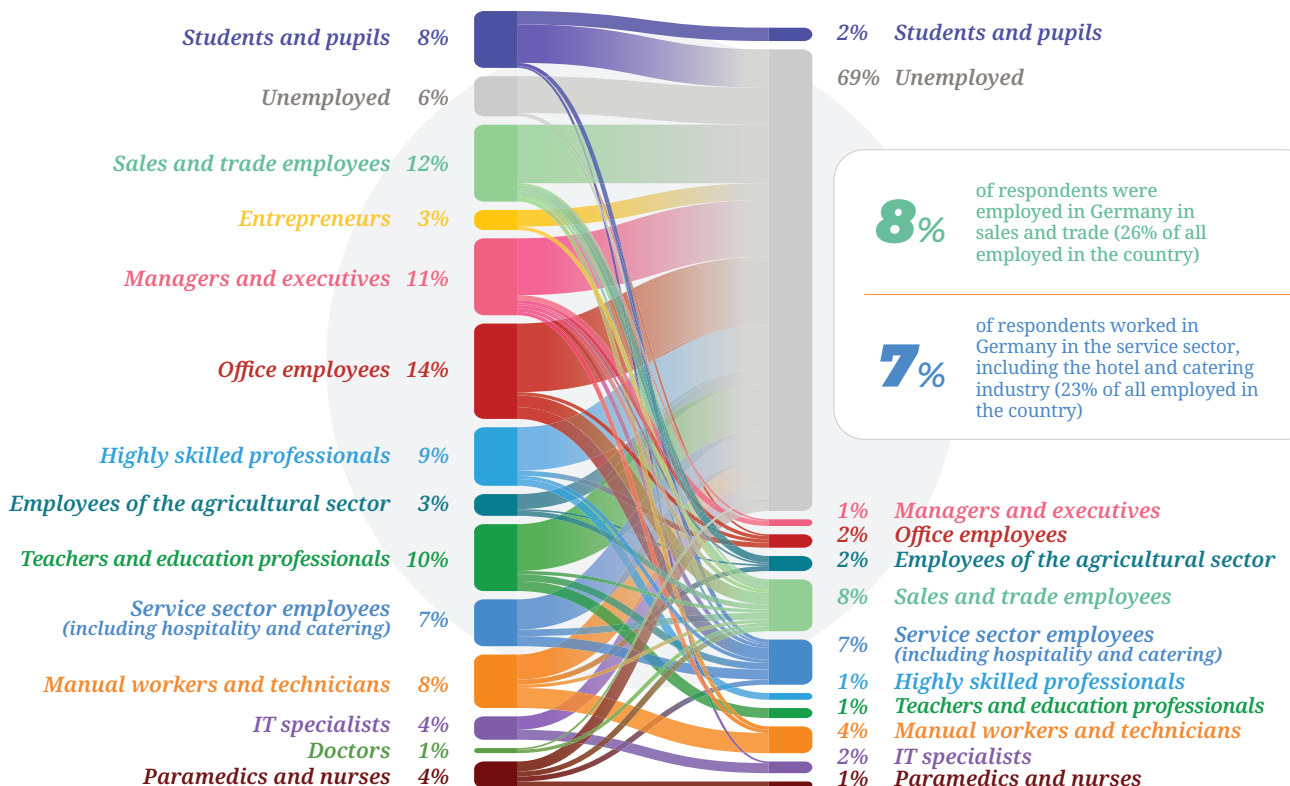


What profession did you have in Ukraine?

N=400

What profession did you have in Germany after the outbreak of war?

N=400

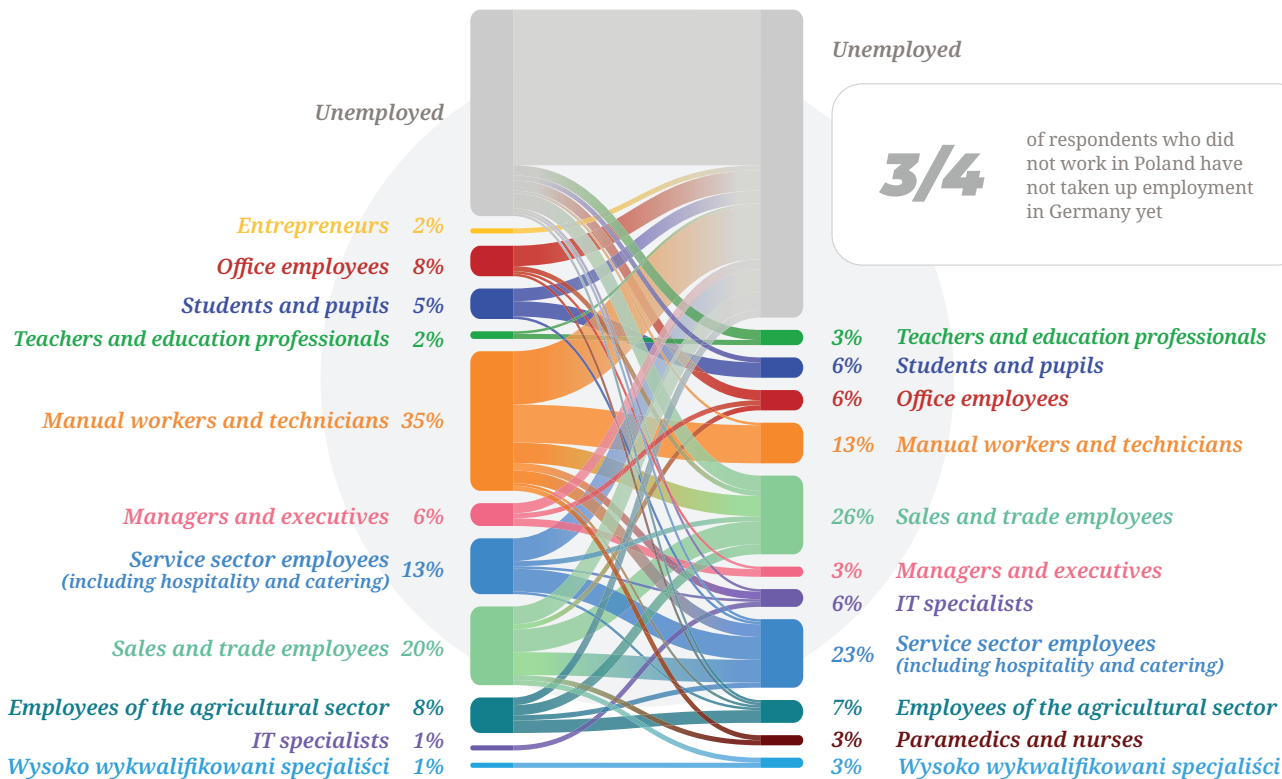


What profession did you have in Poland after the outbreak of war?

(among respondents who worked in Poland) N=164

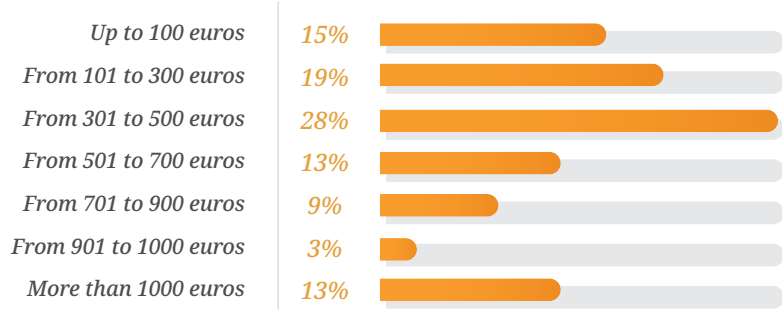
What profession did you have in Germany after the outbreak of war?

(among respondents who are working in Germany) N=124



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

N=400



494€

euros per month is the average amount refugees are left with

Ukrainian nationals declared that before the outbreak of the war they performed work in various sectors and industries in their country. The most common jobs were office work (14%), sales and trade (12%) and managerial or executive work (11%). In turn, 9% of respondents were highly skilled professionals, while 8% were pupils and students. A total of 5% were healthcare professionals such as doctors, paramedics and nurses, who are severely lacking on the German labour market.

Every third employed Ukrainian citizen (34%) performed manual or technical work while working in Poland after the outbreak of the war. In contrast, nearly one in five employed respondents (19%) took up employment in sales and trade, and 17% in the service sector (including hospitality and catering).

Every fourth working Ukrainian citizen in Germany (26%) who left Poland for Germany took up employment in sales and trade, and 22% in the service sector. 13% of employed respondents did manual or technical work and 7% worked in the agricultural sector.

38% of respondents admit that after paying all expenses related to their stay in Germany, they are left with more than €500 per month. In contrast, 28% of respondents declare that they have between €301 and €500 a month left. It is worth noting that in the previous surveys 59% of Ukrainian citizens indicated that after paying all expenses connected with their stay in Poland, they had more than PLN 500 left per month.

35%

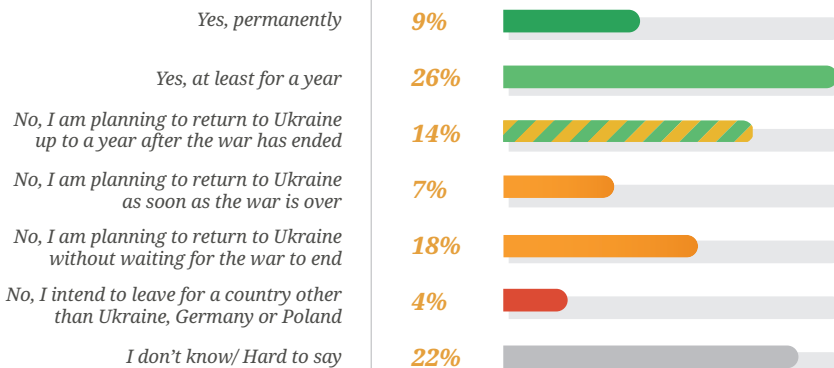
of respondents are planning to stay in Germany for at least a year

39%

of respondents intend to return to Ukraine in a longer or shorter perspective

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

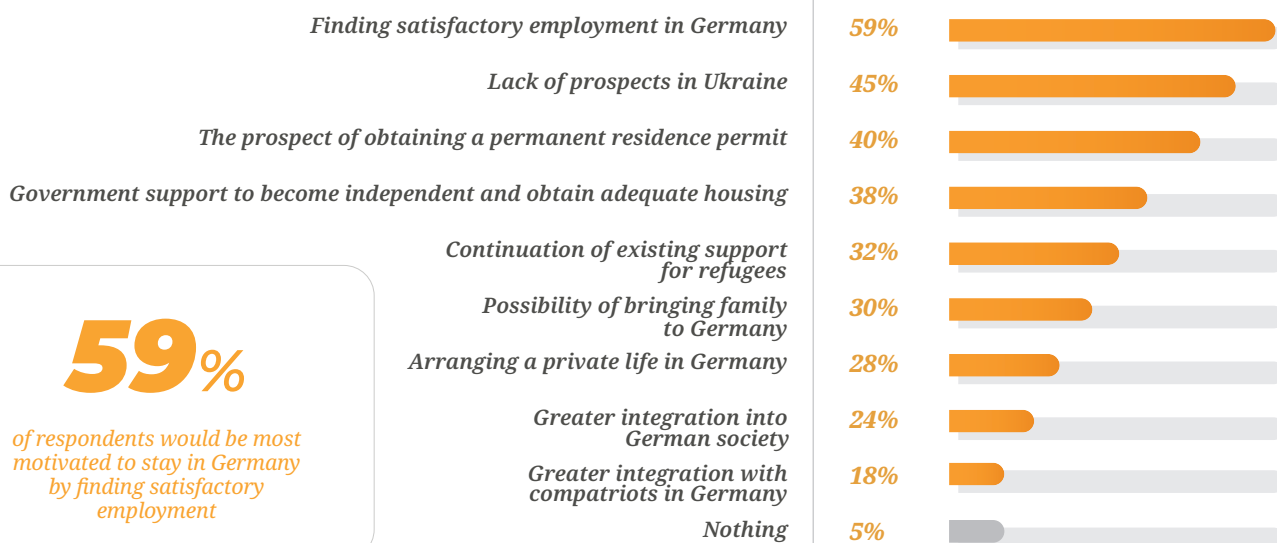
N=400



What would most encourage you to stay in Germany for longer?

(multiple responses possible)

N=400



59%

of respondents would be most motivated to stay in Germany by finding satisfactory employment

The survey showed that 35% of respondents would like to stay in Germany for at least a year and only 9% permanently. In contrast, 39% of Ukrainian refugees are planning to return to Ukraine in the near or distant future. 4% of those surveyed intend to leave for another country other than Ukraine, Germany or Poland. Noticeably, there is also a relatively high percentage of the undecided – 22%.

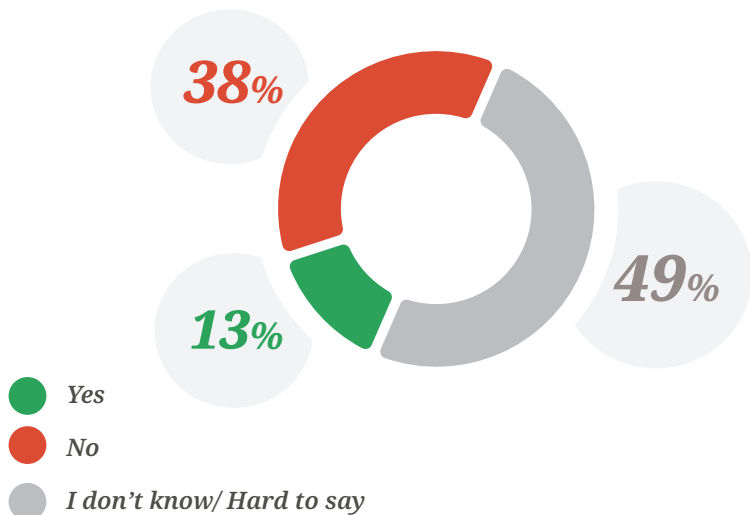
Satisfactory employment in Germany (59%) is a key factor motivating Ukrainian refugees to stay in this country for the long term. 45% of respondents indicate

that their decision is determined by the situation in Ukraine, which is still facing Russian aggression. 40% of respondents indicated that they were motivated by the prospect of receiving a permanent residence permit.

Important reasons to stay in Germany for longer for one in three respondents are: the continuation of existing support for refugees (32%), the possibility of bringing their family to Germany (30%) or the arrangement of private life (28%). Almost one in four respondents (24%) indicated greater integration into German society as a reason to stay.

Are you considering returning to Poland before or after the end of the war?

N=400



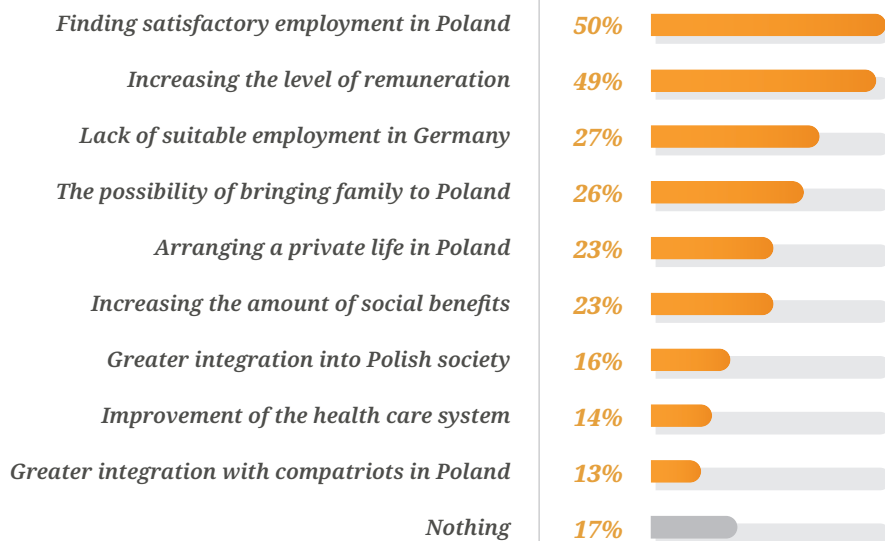
13%
of respondents are considering returning from Germany to Poland

What would most encourage you to return to Poland and stay in this country for a longer period?

(multiple responses possible)

N=400

50%
of respondents admit that finding satisfactory employment in Poland would motivate them to return to the country



Nearly half of the respondents (49%) do not know whether they will return to Poland before or after the war, and 38% of respondents do not plan to return at all. This indicates that Ukrainian refugees currently in Germany often do not consider the option of returning to Poland. Only 13% of those surveyed are planning to return.

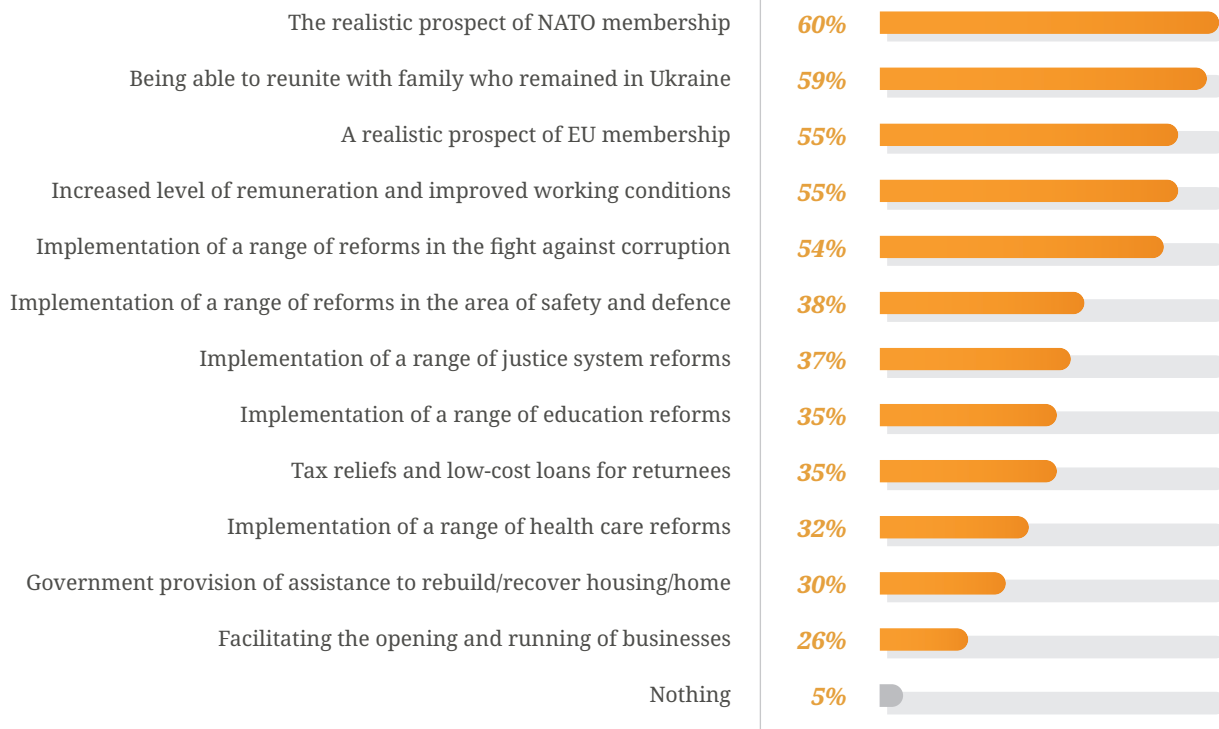
For half of the respondents (50%), the key factor motivating them to return to Poland is satisfactory

employment, as well as higher remuneration (49%). The survey shows that career failure in Germany (27%) could also encourage Ukrainian refugees to return to Poland. The possibility of bringing their family to Poland (26%) and arranging private life (23%) are further reasons why Ukrainian citizens would consider returning to Poland.

What would most motivate you to return to Ukraine after the end of the war?

(multiple responses possible)

N=400



55%

of respondents declare that an increase in the level of salary would motivate them to return to Ukraine

35%

of respondents declare that tax reliefs and cheap credits would motivate them to return to Ukraine

As motivating factors for returning to Ukraine after the end of the war, Ukrainian refugees first and foremost point to Ukraine’s civilisational choice – the real prospect of NATO membership (60%) and the EU membership (55%), which represent a guarantee of security for the nation. The family factor (the possibility of reuniting with family who remained in Ukraine – 59%) and the economic factor (increased level of pay and improved working conditions – 55%) are other important reasons why Ukrainian citizens would consider returning to their homeland after the war.

More than a third of the respondents (35%) admit that

an important motivating factor for returning to Ukraine are tax reliefs and cheap loans and credits. In turn, 30% of respondents point to government support in rebuilding or recovering flats or houses, and one in four respondents (26%) mention the facilitation of opening and running of businesses.

It is worth noting that these are only early declarations and the final decision about returning to their homeland will depend on many circumstances, in particular on the course of the war, as well as the economic situation in Ukraine.

Methodology

The survey with Ukrainian citizens who after 24 February 2022 arrived in Poland and subsequently moved to Germany was conducted between 4-21 August 2023 by means of online CAWI interviews.

The interviews were conducted in Ukrainian on a sample of a total of N=400 adult citizens (18+) of Ukraine who were staying in Germany at the time of the survey. The survey was conducted with the help of a panel (contact database) of refugees from Ukraine and was purposeful (purposive sampling).

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

The interviews were conducted with people receiving temporary protection in Germany and residing in various German cities (including Berlin, Munich, Frankfurt, Cologne, Dusseldorf, Regensburg, Bochum, Freiburg, Memmelsdorf, Kersbach, Bamberg, Herzogenaurach, Lippstadt).





Andrzej Korkus

*EWL Group CEO
Chairman of the EWL Foundation*

Poland, for years regarded as the country of first choice among citizens of Ukraine, has encountered a new challenge in recent months in the form of an increasing number of refugees departing for Germany. Right now, a scenario is unfolding that Polish employers feared back in 2019 when Germany announced a wider opening of its labour market to foreign workers from 1 March 2020. Tempted by four times higher remuneration and a West European quality of life, Ukrainian citizens were already then “expected to leave” for the West.

However, research conducted at the time by EWL and the Centre for East European Studies at the University of Warsaw showed that Poland had a number of advantages, thanks to which it ranked ahead of Germany. These included a significantly lower language barrier, cultural proximity and the presence of almost a million Ukrainian citizens in Poland, a liberal procedure for employing foreigners or the possibility of applying for temporary residence. After the outbreak of the war in Ukraine and the opening of EU countries to refugees, the advantages of Poland as a first-choice country for migrants from Ukraine ceased to be unique. Furthermore, in terms of remuneration Poland still cannot compete with West European countries.

After 24 February 2022 Germany responded to the influx of refugees from Ukraine by introducing the most liberal regulations on access of foreigners to the labour market, together with fast and often compulsory language and vocational courses, while taking advantage of the high level of professional qualifications of Ukrainian citizens at the same time. These measures, combined with the acute shortage of labour on the German market, indicate the likelihood of a further strengthening of this migration trend.

How will Poland respond to this? Although we are experiencing an increase in the share of immigrants in the labour market, it still remains at a relatively low level. By comparison, before the COVID-19 pandemic in Germany, immigrants accounted for 26% of the labour market and 18% in OECD countries. At that time, it was only 3-4% in Poland and 1% in Ukraine. Currently, the share of refugees in the Polish labour market is 6.5%. In order to meet the growing employment needs, Poland should broaden its horizons and look for other directions to recruit the talent necessary for the development of the country’s economy.



Michalina Sielewicz

*EWL Group International Development
Director*

Before the outbreak of the war, and also at its beginning, Ukraine was a distant country for many German entrepreneurs. The prevailing scepticism towards Ukrainian employees was mainly the result of limited experience in employing Ukrainian citizens. It is worth mentioning that the number of Ukrainians living in Germany in 2021 was relatively small – approximately 150,000 people, which accounted for only 1.3% of the total population of foreigners in the country. However, in just a year and a half this number increased sixfold, presenting a real challenge, but also an opportunity for the German labour market.

Research carried out by the German Institute for Economic Research sheds new light on the process of integration of Ukrainian refugees into the German labour market. At the beginning of the year, only 18% of them were economically active, whereas today, according to our research, this indicator may be 31%. Moreover, the forecasts are promising and foresee that in the future this percentage could even reach 70-80%. This is undoubtedly the result of an effective support system in Germany that motivates refugees to work and integrate with the local community.

Research shows that almost 99% of Ukrainian refugees have integrated with the German society, which can be considered a huge success for the host country. To facilitate the entry of refugees into the labour market and integration with their new environment, German companies and local and central authorities have introduced a number of initiatives, such as language and vocational courses, which have greatly contributed to this outcome.

If the war continues and current migration trends stay at a similar level, in 2024 Ukrainian citizens could become the largest group of foreigners in Germany, characterised by a high participation in the labour force. This forecast highlights the need to develop the right strategy on migration policy in order to fully make use of the opportunities and possibilities arising from the influx of Ukrainian migrants to Germany, including migrants with high professional skills.



JAN MALICKI, DR H.C.

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

A year ago, Poland took in millions of refugees under its roof. But at the time there were also claims about the risks associated with the influx of refugees from Ukraine, saying that migrants would take away jobs from Poles and put a strain on the social welfare system. Today we are facing a different problem widely occupying the public opinion, namely that the departure of some refugees from Poland to Germany will lead to the deepening of the gap on the labour market and thus a consequent slowdown in economic growth.

Indeed, over the past year the number of refugees from Ukraine in Poland has decreased by a quarter and in Germany increased by half in the same period. However, Poland is still home to around 1 million refugees. We can also add more than 1 million of the so-called pre-war migrants to this number.

Poland still retains its assets, which attract citizens of Ukraine. Cultural, linguistic and geographical proximity, and deep-rooted friendly relations make many newcomers from beyond Poland's eastern border perceive the country as their second home.

I would like to encourage you to have a calm debate on migration. Too many emotions surrounding this issue may, to some extent, discourage refugees from staying in Poland, especially now that the whole EU is welcoming Ukrainian migrants. The need for a responsible and carefully thought-out migration policy has never been as great as it is today.

The results of this survey are also of significant importance for the authorities of Ukraine, who will be looking for effective ways to encourage their citizens to return to the country in the future. And although it is still too early to talk about the return of Ukrainians to their homeland, it is certain that without their contribution, without their hearts, ideas and hands to work, rebuilding their country after the brutal Russian aggression will not be possible.

Nevertheless, previous war experiences and armed conflicts on our continent have proven that nearly a quarter of the refugees remain in the countries where they found refuge from the nightmares of the war. This means that once the war is over, Ukraine should be open to economic migration from other countries, as it is migration that is now an important element in the formation of the economic potential of individual countries.



Andrzej Klarkowski

Undersecretary of State, Deputy Head of the Chancellery of the Prime Minister of the Republic of Poland

At the beginning, the authors should be congratulated on their research, which addresses an important social process and has great implications for Ukraine, Poland and Germany.

What seems important for Poland is that the Polish labour market is not sufficiently open to refugees from Ukraine with high professional qualifications. There is a large offer of jobs dominated by manual or technical work, but this does not match the competences and expectations of the refugees, mainly women with a university degree, most of whom came to Poland with children.

The natural reaction is therefore to look for a country where there is, according to the respondents, the prospect of better jobs and higher social benefits (this is the stereotype of Germany in the eyes of Ukrainian refugees).

The results of the survey indicate that the refugees moving from Poland to Germany have mostly failed to find employment (69%), which is a worse result than during their stay in Poland (59% of the unemployed). On the other hand, more often than in Poland the refugees found jobs in Germany in services or trade, which probably suits refugee women better, who often left their homeland with their children.

It is also worth noticing there is a greater intensity of integration of refugees in Germany than in Poland through language courses, contacts with the local community, cultural events. During their stay in Poland contacts at the workplace were more important for the refugees than in Germany. The results may therefore indicate that Polish institutions are less prepared to facilitate integration of refugees from Ukraine compared to German institutions.

A worrying result for Ukraine is that a third of the refugees wants to stay in Germany for longer. As these are younger, well-educated people (often with children), this could have negative consequences for Ukraine's reconstruction and demographic projections. The motivation for the refugees to return may, however, be the prospect of Ukraine's integration into the EU, NATO and Ukraine's reforms leading to improved living conditions.

It is worth undertaking a cyclical survey of refugees to determine the situation and the individual fate of those forced by Russia to leave their country. This information would be useful for Ukraine and for countries supporting refugees.



Justyna Schulz

Director of Institute for Western Affairs

The research presented here confirms the results of analyses carried out in Germany. They emphasise the consequences for integration processes which result from the specificity of migration from Ukraine, as it concerns above all women and children. Furthermore, migrants from Ukraine are distinguished by the fact that they are equal with German citizens in rights in terms of access to the labour market and social benefits.

On the one hand, the specificity means that the participation of Ukrainian refugees in the labour force is lower than that of economic migrants, also due to childcare. On the other hand, migrants from Ukraine participate in preparatory courses that facilitate finding employment, such as language and integration courses. Participation in these courses is the condition for receiving social benefits, just as in the case of German citizens. Perhaps that explains such a large difference in the use of forms of integration, in which only 1% of migrants did not participate in Germany, while in Poland it was 16%.

Migration from Ukraine is not seen as a solution for the widely discussed shortage of professionals in Germany. Most migrants are engaged in auxiliary work or on-the-job training, often below their qualifications. In this segment of the labour market, Germany does not feel a shortage of labour. Our research also shows that of the highly skilled professionals or teachers from Ukraine, who made up a total of 19% of respondents, only 2% found employment in line with their qualifications, both in Poland and in Germany.

From the perspective of Ukraine or even the entire region of Central and East Europe, this is to some extent a devaluation of human capital and the investments made in its development. On the other hand, there should be optimism in the fact that both our research and research in Germany shows still a high percentage of people declaring their willingness to return to Ukraine (over 60%, with about 20% of the undecided). Men declare an 11 percentage points higher willingness to stay in Germany than women.



Cezary Kaźmierczak

President of the Union of Entrepreneurs and Employers

In recent months we have been observing with concern the trend of a decrease in the number of migrants from Ukraine in Poland. A year ago, more than 2 million Ukrainians were living in Poland, today it is around 1.2 million. At the same time, the number of Ukrainians staying in Germany is growing as there is currently about the same number of Ukrainian migrants there as in Poland.

This is no good news for the Polish economy and the labour market. In 2022, the fertility rate in Poland was 1.26, which is one of the worst results not only in Europe, but also in the world. This entails very serious consequences both for the social security system and for the labour market. Polish entrepreneurs are currently facing a significant shortage of workers in both simple and specialist jobs. This applies equally to the construction or transport sector, as well as, for example, to the medical sector.

The results of research carried out by EWL and the Centre for East European Studies at the University of Warsaw clearly show that highly skilled professionals at the peak of their working age are leaving Poland for Germany. This means that Poland was probably not able to provide them with the right conditions for their career development, e.g., through an easy and clear path for the recognition of professional competences, which for years our Union has been calling for.

Obviously, issues such as levels of remuneration and social benefits are among the main factors motivating people to move to Germany, but in this field Poland is not able to compete with its richer neighbour. However, research indicates that factors such as access to language training, the possibility of finding a job matching one's qualifications or social issues are also very important, and certainly there is still much we can do here to keep refugees in Poland.



The Chancellery of the Prime Minister provides services to the Prime Minister and the Council of Ministers. We take care of the government's cooperation with, among others, the President and the Parliament. We help the Prime Minister to efficiently direct the work of the government and represent Poland on the international arena. We also work for plenipotentiaries, committees, joint committees, councils, teams and other subsidiary bodies of the government.

The Chancellery of the Prime Minister is also an office. It is here that a number of key decisions are made that affect our country and its citizens. Every Tuesday meetings of the Council of Ministers are held in the A. Frycz Modrzewski Hall. This is when the Prime Minister, together with Deputy Prime Ministers and Ministers, takes a number of decisions, adopting, inter alia, acts of law, regulations and resolutions. However, before this happens, draft documents are discussed by the Standing Committee of the Council of Ministers, which is an advisory body for the government.

At the Chancellery of the Prime Minister, we also analyse and monitor the activities of government administration. We do this in order to ensure that public satisfaction with the work of government offices is at the highest possible level.



The Institute for Western Affairs is an interdisciplinary research and expert institution, continuously operating for nearly 80 years, established by a group of distinguished professors from the pre-war University of Poznan and social and political activists.

The research focuses on the history and present day of Germany, the history of German-Polish relations, the changes in the Western and Northern Territories, European and transatlantic issues, global issues, in particular security issues.

It is active in the fields of science and political education, respecting the freedom of scientific research, in the spirit of tolerance and dialogue.



The Union of Entrepreneurs and Employers (ZPP) is the fastest growing and one of the most active organisations of employers in Poland. The organization established in 2010 comprises 17 regional and 19 sectoral organisations. In addition to taking positions on all key issues of the public debate, the Union conducts a number of dedicated activities under the Digital, Labour, Energy and Climate, Agriculture and Health Forums. We organise around 40 original events per year.

The Union is an apolitical organisation supporting free market, fair competition, stability and transparency of the law and common sense, regardless of political divisions.

We are a representative employer organisation and a member of the Council for Social Dialogue in Poland. The Union is represented in Brussels through its Representative Office, membership of the European Enterprise Alliance and membership of SME Connect. The Union has two representatives in the European Economic and Social Committee. Since July 2022, the Union has had an office in Kiev actively supporting the development of Polish-Ukrainian economic cooperation.



EWL MIGRATION PLATFORM

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

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

As a global migration platform, EWL uses dedicated AI technology in its operations, which quickly and effectively

matches candidates with employers, taking into account the skills and experience of potential employees.

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

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



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

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

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

governmental organizations and migrants themselves.

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



THE CENTRE FOR EAST EUROPEAN STUDIES AT THE UNIVERSITY OF WARSAW

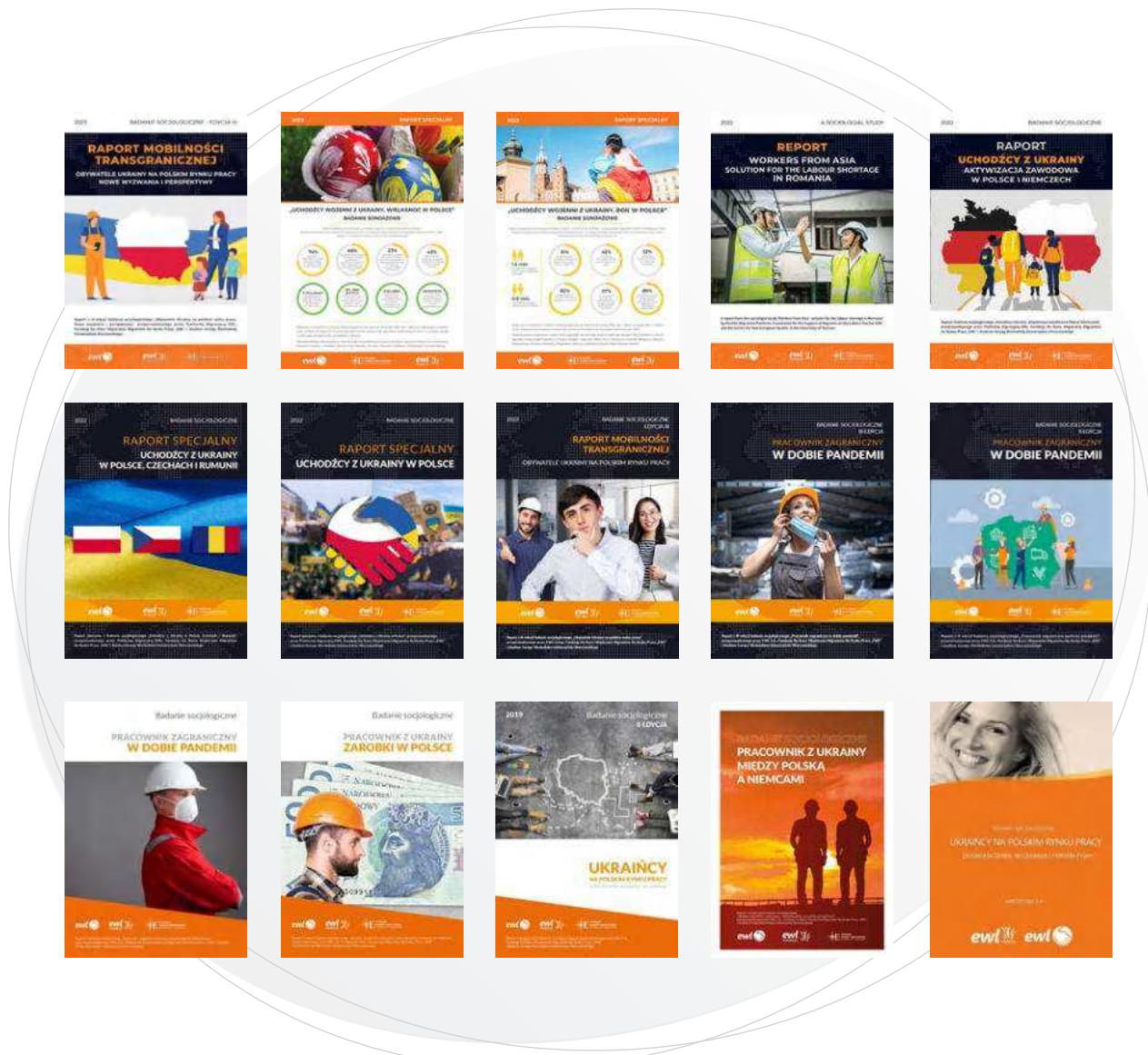
The Centre for East European Studies is a unique academic unit in Poland, continuing the traditions of Pre-war Sovietological centres – the East European Institute in Vilnius (1930–1939) and the Eastern Institute in Warsaw (1926–1939). The teaching offer of the Centre includes elite Eastern Studies (1st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

The Centre annually organizes international scientific conferences and a series of events building positive relations between Poland and the countries of the former USSR. It is also

the publisher of numerous books and magazines devoted to the eastern themes.

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

EWL MIGRATION PLATFORM AND THE CENTRE FOR EAST EUROPEAN STUDIES UW REPORTS



Report „From Poland to Germany. New Trends in Ukrainian Refugee Migration”
A survey by EWL and the Centre for East European Studies at the University of Warsaw

© 2023 EWL S.A. All rights reserved.

Source of quoted data:
EWL report „From Poland to Germany. New Trends in Ukrainian Refugee Migration”

ISBN 978-83-961929-9-8

The survey was commissioned by the Chancellery of the Prime Minister of the Republic of Poland

Survey partners:
Union of Entrepreneurs and Employers
Institute for Western Affairs

Photo used on the cover:
File name: Berlin Ostbahnhof- auf Bahnsteig zu Gleis 7- Wagen
des Berlin-Warszawa-Expresses 11.8.2009.JPG
Author: Wikimedia-User Jivee Blau
Created: 11 August 2009
Licence: CC BY-SA 3.0

Berlin-Warszawa-Express



AUTHORS:

Anatoliy Zymnin (project manager), dr hab. Mariusz Kowalski (social geographer, content-related supervision), Sylwia Kowcuń, Szymon Bryzek, Eliza Dąbrowska, Margaryta Sytnik, Michał Niecko, Karolina Klages, Filip Stelmach, Adam Cichoń (graphic design, pre-press)

CONTACT:

Anatoliy Zymnin

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

Michał Wierzchowski

Sales Director
+48 500 280 903
michal.wierzchowski@ewl.com.pl

Michalina Sielewicz

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