

Economic integration of Ukrainians in Poland by the end of 2023: insights and challenges

Ukraine Longitudinal Study - Round 19

SUMMARY OF KEY FINDINGS

I. RESPONDENTS KEEP ON MOVING ALMOST TWO YEARS AFTER THE ESCALATION OF THE RUSSIA-UKRAINE ARMED CONFLICT: In the 11-month observation period (January-December 2023), one-fifth of the monitored cohort (22%) has left Poland, indicating significant migration movements among Ukrainian refugees. Most departures have been to Ukraine (18%). The commitment to returning to Ukraine remains a predominant sentiment among those who remained in Poland, with many expressing a desire to return to Ukraine in the future (70%). Nonetheless, 88% are planning to stay in the country for at least another 6 months.

II. MISMATCH IN EMPLOYMENT: Despite Poland's substantial support to Ukrainian refugees through legal frameworks and social benefits, integrating them economically poses challenges. Although the proportion of Ukrainian refugees who report working in Poland now (61%) is similar to the proportion of those who reported working in Ukraine prior to the conflict (62%), a notable number of Ukrainians with employment find themselves in roles significantly below their qualifications. In particular, the proportion of respondents working in elementary occupations has seen an almost tenfold increase compared to pre-conflict levels. This discrepancy underscores the difficulties faced by refugees in maintaining their professional backgrounds.

III. NEED IN EMPLOYMENT ASSISTANCE FOR WOMEN WITH CHILDREN: Surveyed Ukrainian refugee households in Poland predominantly comprise women between 18-64 years old and children (83%). Almost every second household with children (48%) is headed by a single caregiver, which is related to specific employment challenges: the predominant barrier to employment for those who seek it is finding work with a suitable or flexible schedule (44%). Targeted job support and childcare services could be helpful for these households.

IV. FINANCIAL CHALLENGES: The findings highlight the low income levels and limited savings capacity of Ukrainian households in Poland, especially those with vulnerable members. The median monthly income of Ukrainians in Poland was EUR 323 per person, with the figure decreasing to EUR 308 for households headed by single caregivers, EUR 296 for households with children, and EUR 253 for those households with members with disabilities. A large majority of households (92%) reported being unable to save any money monthly. Financial assistance from family or friends in Ukraine was received by 12% of respondents, with 5% relying on it as their main source of income, particularly single caregivers of children.

V. ACCESS TO ASSISTANCE REMAINS CRUCIAL FOR MANY UKRAINIAN REFUGEES IN POLAND: Although 44% of households in Poland indicated that they received aid, mainly cash, from the host country or various NGOs, 60% reported urgent unmet needs¹, which underscores the need for continued assistance. Cash was mentioned by 40% of the respondents, especially among households with members having disabilities (47%). The need for medical care or items was the second issue most frequently reported (15% of the respondents), in particular by 32% of all retired respondents and 32% of households with people with disabilities. Material assistance followed (10%), with the highest demand among respondents who reported their main occupation as caregiving to children.

ABOUT | METHODOLOGY & LIMITATIONS

Since the end of February 2022, IMPACT Initiatives has been conducting a monthly survey of people who fled the escalation of hostilities in Ukraine to understand their mobility patterns, needs, integration trajectories, and intentions to return, and how these change over time. Respondents were first interviewed after they crossed the border out of Ukraine from 28 February onwards in Poland, Slovakia, Hungary, Romania, and Moldova at border crossings, transit sites, and reception centres, in partnership with UNHCR and have since been followed up by IMPACT's team, which conducts monthly phone interviews with the same pool of respondents. From October 2022 onwards, we began to diversify sources of consent and have complemented the existing sample through Viber, Facebook, and Kyivstar dissemination campaigns. Given the non random sampling strategy, the results are not statistically representative and must be interpreted as indicative.

This brief of the longitudinal survey uses three distinct sample types in the analysis. The first sample includes all respondents who participated in the survey as of Round 19 (21 October - 10 December 2023) and encompasses respondents in Poland (n=1,355), Germany (n=683), Czechia (n=190), and Moldova (n=159), as well as the aggregate indicator of all European countries, excluding Poland (n=1,934).

The second sample type represents a cohort of respondents in Poland who engaged in three distinct survey rounds (n=645): Round 9 (13 January – 6 February 2023), Round 14 (7-29, June 2023), and Round 19 (21 November – 10 December, 2023).

1. Urgent needs were self-reported by respondents during the interview.



The Poland cohort allows to focus on changes in the situation of refugees by tracking the evolution of the situation of the same group of respondents over time.

A third, wider cohort of respondents was selected to account for movements across different countries. It includes respondents who participated in the aforementioned rounds, with all respondents initially selected in Poland as of Round 9. The overall cohort allows to track the countries in which respondents were present during Rounds 14, 19 and 20 (n=838 people).

Round 19 of the longitudinal survey has been funded by the International Federation of Red Cross and Red Crescent Societies.

1. CONTEXT AND POLICIES IN POLAND

The escalation of the hostilities in Ukraine on the 24 February 2022 resulted in unprecedented displacement. According to UNHCR estimates, 6,444,800 people remain displaced abroad as of December 2023. 1,640,510 have applied for Asylum, Temporary Protection, or similar national schemes to be registered as refugees² in Poland, with 956,635 currently registered in the country³. At the onset of the conflict, Poland sheltered the largest number of Ukrainian refugees. According to the Eurostat data⁴, almost two years after the invasion began, Poland is only second to Germany in the number of Temporary protection documents issued.

The main legal framework regulating Ukrainian refugees' stay in Poland is a "Special act on assistance to Ukrainian citizens in connection with armed conflict on the territory of the country"⁵. The Act encompasses a range of crucial provisions that grant Ukrainian refugees access to legal employment, education, and healthcare on par with Polish citizens. In addition, it offers certain social benefits similar to those available to Polish residents, such as the Family program, which provides monthly financial assistance of PLN 500 per child, as well as additional support to households with two or more children, the "Good Start"

financial assistance program for schoolchildren, and one-time financial assistance of PLN 300 (approx. EUR 70) for all refugees.

While the EU extended temporary protection until March 2025⁶, the internal policies of the member states have been diminishing the extent of benefits provision. Poland is not an exception, as shown by various policy changes. In June 2022, free-of-charge public transportation for Ukrainian refugees was terminated, followed a month later by the cancellation of compensation payments of PLN 40 per day (approx. EUR 9) for families hosting Ukrainian refugees for more than 120 days, except for some specific vulnerable population groups. These changes have potentially led to a decrease in the amount of housing volunteers provide to refugees, as evidenced by the longitudinal study⁷. Furthermore, from September to October 2022, Poland witnessed a 26% decrease in the number of refugees holding Temporary Protection status⁴. In 2023, refugees residing in collective centres for over 120 days began contributing to living expenses, initially covering 50% of the costs in March, with a further increase, in May, to 75% following 180 days of stay.

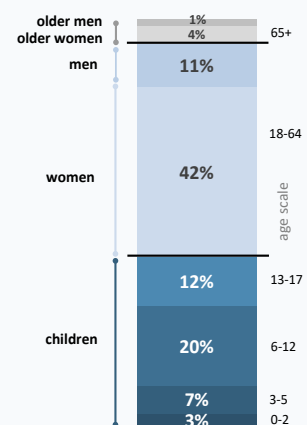
As of February 2024, the legal stay for Ukrainian refugees in Poland is set to expire at the end of June.

2. DEMOGRAPHICS

Most Ukrainian refugee households in Poland (83%) were primarily composed of women between 18-64 years with children, where children accounted for 42% of all family members. Additionally, one in every three (34%) households was led by a single caregiver⁷, while one fifth (22%) included people with disabilities⁸ in their composition.

During Round 19, the typical household of Longitudinal Study participants in Poland comprised an average of 2.8 individuals. Among all household members, accounting for 3,839 people, 42% were children, including 10% in the childcare or kindergarten age group (0-5 years). There were no significant differences in age composition of respondents in Poland compared to respondents in other European countries. Regarding the gender makeup of adult household members aged 18 and older, women constituted the majority at 79%, while men accounted for the remaining 21%.

Figure 1: Household composition of Ukrainian refugees in Poland



2. In our study, refugees are defined as all people who have left Ukraine since February 24, 2022, due to the Russia-Ukraine conflict outbreak, regardless of their formal status.

3. UNHCR, "[Ukraine Refugee Situation](#)," UNHCR Operational Data Portal, December 2023,

4. Eurostat, "[Beneficiaries of temporary protection at the end of the month by citizenship, age and sex](#)"

5. Legal portal for people fleeing Ukraine, "[The Act on Assistance for Ukrainian Citizens](#)". 14 June 2023.

6. Council of the European Union, "[Ukrainian refugees: EU member states agree to extend temporary protection](#)", 28 September 2023

7. IMPACT Initiatives, "[Monitoring the experiences of people displaced from Ukraine](#)" (Geneva 2023)

8. Individuals who are the sole children's caregivers in a household.

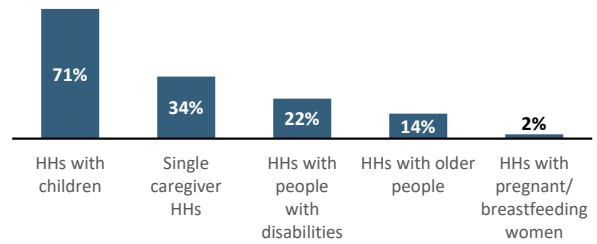
9. The self-reported disability was measured using the Washington Group short set of questions. Further guidance on the Washington Group short set is available [here](#)



Overall, 71% of surveyed households had children, while 34% were headed by single caregivers⁸. Taking into account only households with children, the average number of children stood at 1.7. Specifically, 53% had one child, 33% had two, 11% had three and the remaining 4% had four or more children. Notably, almost half of the households with children (48%) were managed by single caregivers.

Regarding vulnerable population groups, 22% of all surveyed in Poland reported having at least one household member with difficulty seeing, hearing, walking, remembering, concentrating, communicating, or self-care⁹. Among this subset of respondents, over half (51%) indicated that the household member(s) have mobility issues, and 41% stated visual impairments, totaling 11% and 9% of all respondent households respectively.

Figure 2: Percentage of Ukrainian refugee households in Poland reporting presence of vulnerable population groups



3. LOCATION AND MOVEMENT INTENTIONS

3.1. REGION OF ORIGIN

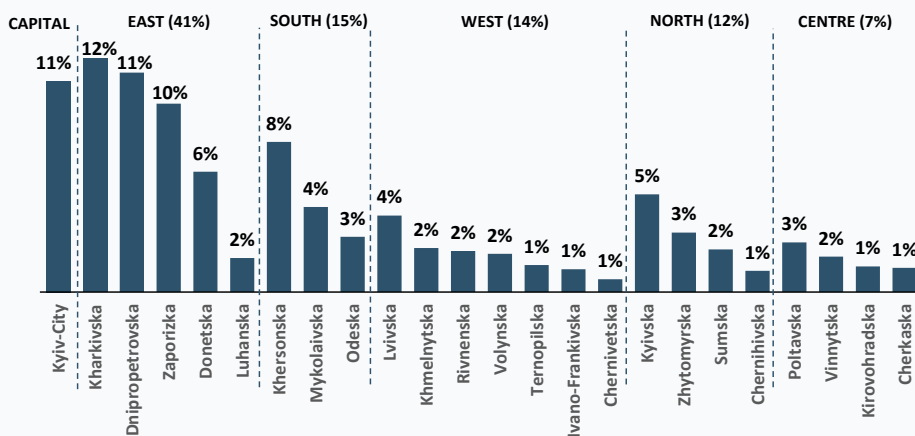
Compared to other European countries, Poland hosts more people from the West of Ukraine, and fewer from the South.

As of Round 19, the predominant group of respondents residing in Poland hailed from the Eastern macro-region¹⁰ of Ukraine (41%), with the most common oblasts¹¹ being Kharkivska (12%), Dnipropetrovska (11%) and Zaporizka (10%).

The South (15%, against 26% for respondents residing in other European countries¹²) and the West (14%, against 5% in other European countries) follow.

The relatively high proportion of refugees from the Western part of Ukraine in Poland compared to other countries in Europe can be explained by its geographical proximity, which makes relocation more logistically convenient.

Figure 3: Oblast of origin¹³ of Ukrainian refugees in Poland



3.2. CURRENT LOCATION

As of Round 19, 75% of all respondents living in Poland were residing in five out of sixteen voivodeships¹⁴: Dolnośląskie (26%), Małopolskie (14%), Lubelskie (14%), Wielkopolskie (11%), and Mazowieckie (10%). In each case, the majority of refugees were living in the voivodeship capital (see Map 1).

11. Oblasts are the highest level administrative division in Ukraine.

10. A macro-region is understood in this survey as a territorial unit comprised of multiple oblasts. To ease the readability of the findings, oblasts were grouped by macro-regions in the following way: **North:** Kyivska, Zhytomyska, Sumka, Chernihivska. **East:** Dnipropetrovska, Kharkivska, Zaporizka, Donetska. **West:** Lvivska, Volynska, Ivano-Frankivska, Rivnenska, Ternopiliska, Khmelnyska, Zakarpatska, Chernivetska. **South:** Odeska, Mykolaivska, Khersonska. **Centre:** Poltavaska, Vinnyska, Cherkaska, Kirovohradska. **Kyiv-city, Sevastopol-city, and the Autonomous Republic of Crimea** are separate administrative units and are not included in the macro-regions mentioned above.

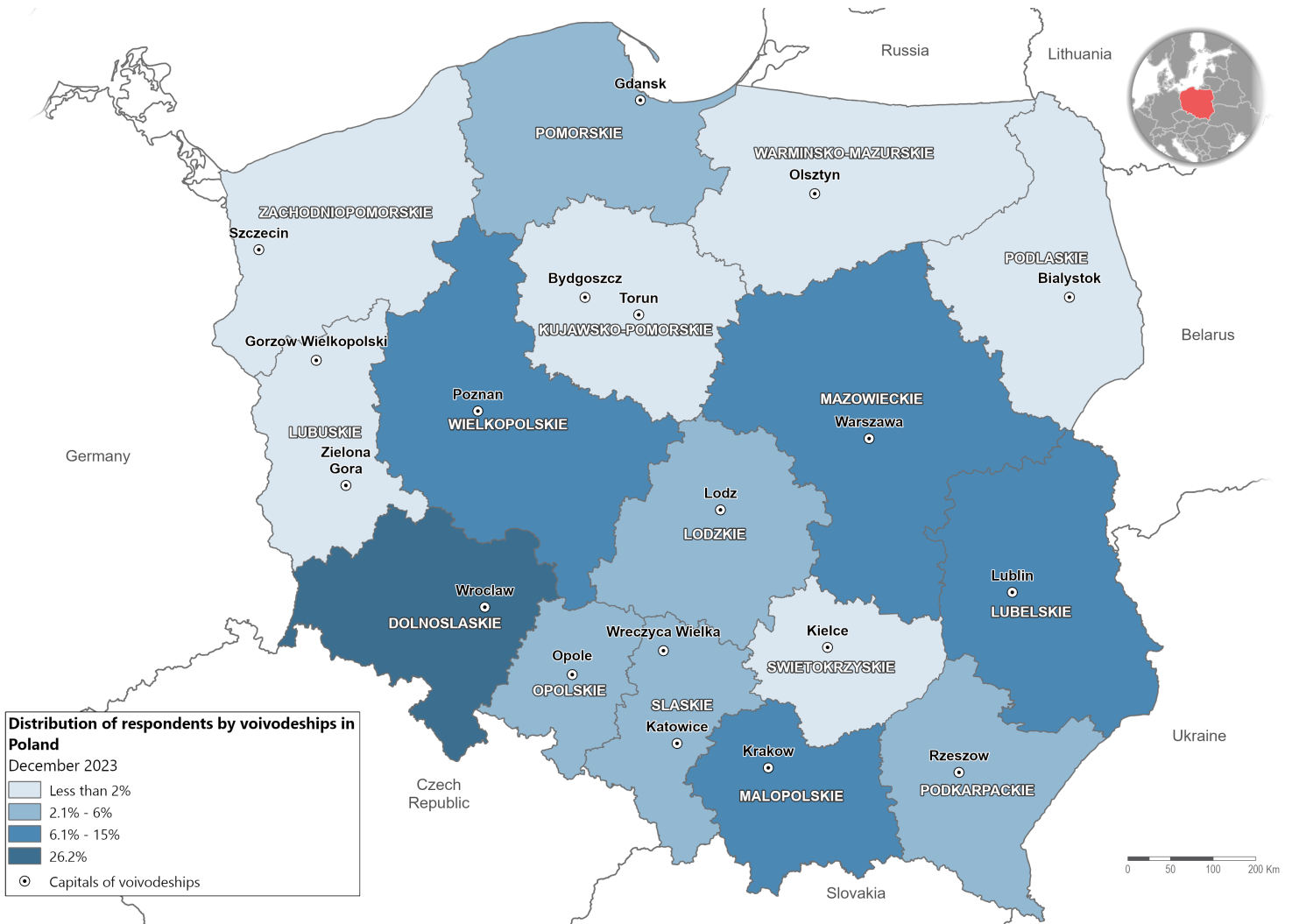
12. The aggregated category of other European countries consists of the following states in the following proportions: Germany (35%), Slovakia (11%), Czechia (10%), Moldova (8%), Romania (6%), United Kingdom (4%), Netherlands (3%) and other 26 states with less than 3% each (22%).

13. Oblast of permanent residence before the onset of the full-scale conflict from 24 February 2022.

14. Voivodeships are the highest level of administrative division in Poland.



Map 1: Current location of Ukrainian refugees in Poland by voivodeship



3.3. DEPARTURES FROM POLAND AND PLANS FOR THE FUTURE¹⁵

One in five respondents left Poland in 2023, mostly towards Ukraine. Most of those who stayed indicated planning to remain for the next six months yet were inclined to come back to Ukraine later in the future.

Based on the cohort of respondents who participated in each of January, June, and December 2023 rounds, 15% left Poland during the first 5 months of observation (by June). Out of those who did leave, 13% relocated to Ukraine and 1% to Germany. Almost everyone who relocated to Ukraine (93%) stayed there by December, whereas 6% came back to Poland and the rest (1%) moved from Ukraine to Germany. From June to December, another 10% of the remaining Polish cohort left the country, with 7% heading to Ukraine and 1% to Germany.

In summary, 22% of the mentioned cohort left Poland

during 11 months of monitoring from January (Round 9) to December (Round 19), with 18% leaving for Ukraine, and 2% for Germany.

It is important to note that the share of the relocations recorded during December may have a temporary nature and be higher than usual due to the holiday season, in particular movements to Ukraine.

In terms of future plans, most respondents (88%) reported planning to stay in their current location for the next six months, stretching into the summer. Roughly 10% of respondents were unsure about their movement intentions. Nevertheless, a notable 70% expressed an inclination to eventually return to Ukraine, with 19% having doubts and 11% firmly resolved not to return.

15. For more information on the profile of those returning to Ukraine please refer to IMPACT Initiatives, ["What do we know about Ukrainian refugees returning home since the full scale invasion?"](#) (Geneva 2023).



4. SOCIO-ECONOMIC SITUATION

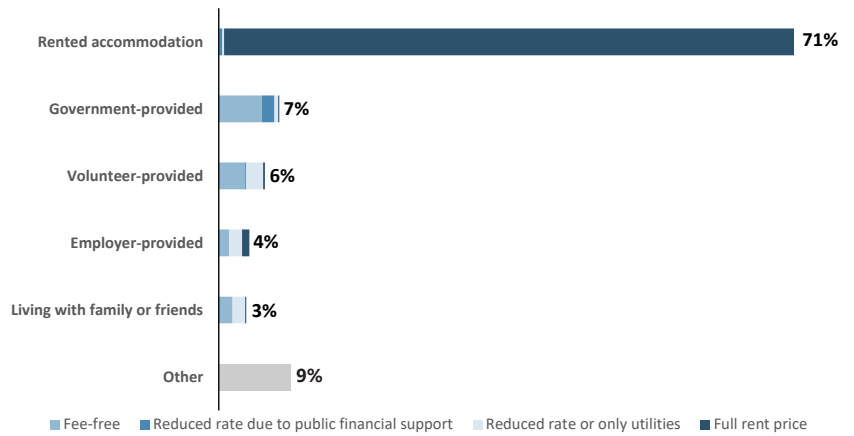
4.1. LIVING ARRANGEMENTS¹⁶

The share of respondents in Poland who reported renting houses has been steadily increasing over time and is much higher than for Ukrainian refugees in other European countries.

As of December 2023, 71% of the respondents in Poland were renting, more than double the percentage for refugees in the rest of Europe (30%). Taking into account the cohort of respondents in Poland participating in each of January, June, and December 2023 rounds, there is an observed increase of rented accommodation over time from 65% in January to 73% in December, comprising an 8-percentage point rise over the 11 months of monitoring. Interestingly, one-third of the respondents who started renting in the last 11 months were formerly living with volunteers. The second largest group of respondents residing in Poland lived in accommodation provided by authorities (not including collective centres), accounting for 7% of the total. This is the lowest proportion compared to other European countries, where 45% of respondents indicated living in such housing¹⁷.

In Poland, 71% of those residing in government-provided accommodation reported not paying

Figure 4: Ukrainian refugees' living arrangements in Poland



any living fees, while 21% reported paying a reduced price thanks to government support.

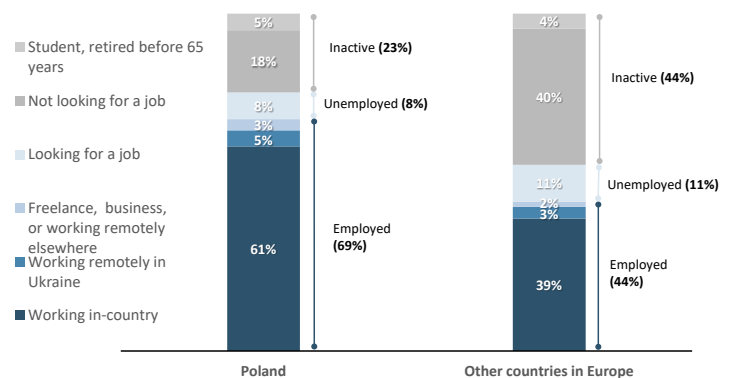
Following closely, 6% of all responses reported volunteer-provided housing, with 57% of them mentioning living rent-free and 36% paying reduced rent or solely for utilities. When considering the cohort of people who participated in each of January, June and December 2023 rounds and stayed in Poland throughout, the survey reveals a significant decrease in volunteer-provided accommodations over 11 months, dropping by half from 10% in January to 5% in December: 42% of those who formerly lived with volunteers started to rent, amounting to 4% of all respondents.

4.2. EMPLOYMENT

Ukrainian refugees reported being employed in rates that approach their pre-conflict ones. Barriers remain, however, particularly with regards levels of occupation and employment for women with children.

As of Round 19, approximately 61% of respondents between 18-64 years old reported working in Poland. When including individuals working remotely, freelancers, or those who own a business, the total share of employed respondents accounted for 69%. Among those working daily in Poland, 48% were involved in elementary occupations, followed by 18% in service and sales roles, and 11% in professional positions¹⁸.

Figure 5: Employment status of Ukrainian refugees (18-64 years old) in Poland and other countries in Europe



16. Longitudinal Study shows a correlation between accommodation type and the decision to leave the host country to come back to Ukraine. For more detail, see IMPACT Initiatives, "What do we know about Ukrainian refugees returning home since the full scale invasion?" (Geneva 2023). It's important to note that all changes in accommodation arrangements mentioned in this section pertain solely to individuals who remained in Poland throughout Rounds 9, 14, and 19, and were not influenced by those who left Poland.

17. Within the group of other European countries, living in accommodation provided by authorities was reported by respondents in the following proportions: Germany 70% (n=683), Slovakia 51% (n=213), Czechia 14% (n=190), Moldova 10% (n=159), Romania 18% (n=125), all remaining European countries 37% (n=564).

18. Occupations were categorised according to the [International Standard Classification of Occupations \(ISCO-08\)](#).



Labour market participation is much higher for refugees in Poland than elsewhere in Europe, where the share of people of working age employed amongst respondents are much lower: 39% of respondents in Europe in general, 19% in Germany¹⁹, and 27% in Moldova against 61% in Poland. The figure is only higher in Czechia and Slovakia, where 65% and 62% of respondents reported working daily in-country, respectively.

Over 11 months of follow-up, the cohort of respondents under the age of 65 who participated in the January, June, and December 2023 rounds in Poland had a significant increase in the number of people employed and working daily in the country. This figure rose by 13 percentage points from the initial 49% in January to 62% in December. The biggest contributors to this growth were respondents who reported their occupation as children's caregiver or reported no occupation, as of the start of the observation period. By December, 27% of these caregivers had secured employment, constituting 4% of all respondents. Additionally, 50% of individuals who reported no occupation as of January 2023 had transitioned to being employed in the host country during the subsequent 11 months of observation, accounting for 10% of all respondents.

The employment-to-population ratio of refugees of working age (under 65) in Poland, nearly two years after the onset of the armed conflict, has reached the pre-conflict level in Ukraine: 62% of respondents reported working in Ukraine before compared to 61% daily in Poland, as of Round 19 (or 69% considering all forms of employment, including remotely in Ukraine).

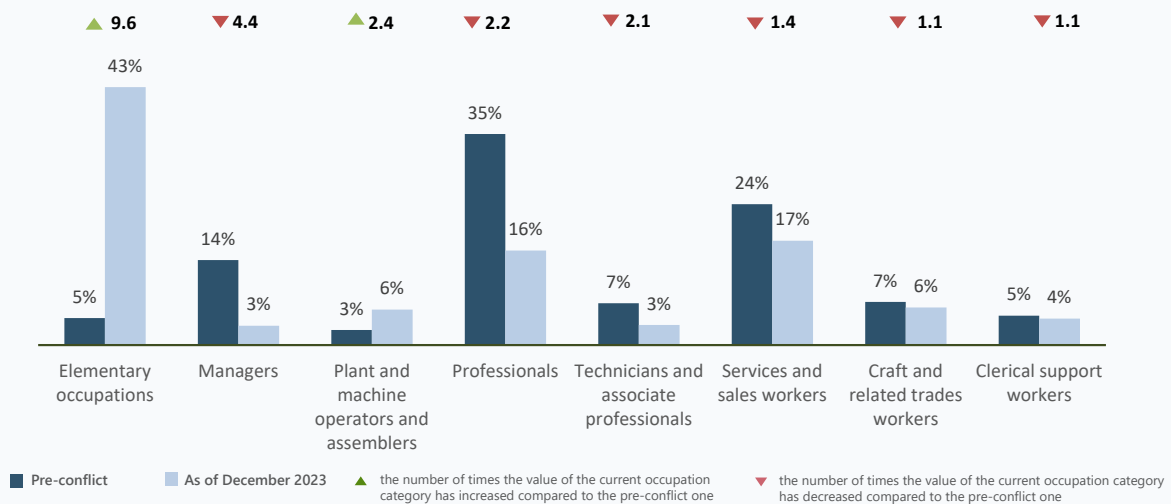
Regardless of high overall employment levels, respondents in Poland work in significantly lower qualification categories compared to their pre-conflict occupations.

The most striking contrast can be observed among individuals engaged in elementary occupations, where the figure has surged by nearly tenfold. Approximately one-third of this increase can be attributed to individuals who had previously worked in professional roles, while another third had been employed as service and sales workers before the conflict outbreak²⁰. For every seven people in the group of people who started working in elementary occupations, one had held a managerial position before the outbreak of the armed conflict. Overall, this highlights the mismatch between occupation categories for refugees in Poland following their displacement from Ukraine.

Among respondents who reported not working (including volunteers, adults taking care of children or adult dependents), 30% indicated that they were actively looking for a job in the last 30 days. These people most commonly noted their reason for not being able to find a job as the inability to find one with a suitable schedule (44%), primarily reported by women with children in their households.

Other reasons mentioned by those actively trying to find a job were the inability to secure a job with decent pay, as well as difficulties caused by insufficient knowledge of the Polish language, cited by 23% and 22% respectively. Another 12% mentioned that they cannot find a job that matches their pre-conflict qualifications or experience. Among female respondents with children in their household who didn't work, 73% were not seeking a job in the last 30 days. In contrast, the figure was 53% (n=51) for women without children, representing a difference of 20 percentage points. This suggests that they face particular challenges in searching for employment.

Figure 6: Pre-conflict and current occupation categories of refugees in Poland



19. While comparing to specific European states, only countries with more than 100 respondents were considered.
 20. In order to assess the shift of the pre-conflict job categories towards the current ones, only respondents who worked before the escalation of the armed conflict and continued as of Round 19 were taken into account.



4.3. INCOME, REMITTANCES AND SAVINGS

Ukrainian households in Poland vary in income: those with children or people with disabilities report lower incomes, while those without children earn more on average. Some send aid to Ukraine (14%) and others receive it from Ukraine (12%). However, most are still unable to save money every month (91%).

Ukrainians in Poland reported a monthly median household income per person²¹ of EUR 323, as of December 2023. When considering households with children, the median figure dropped to EUR 296, conversely, those without children earned EUR 520 per person. Regarding households comprising people with disabilities, the median income per person stood at EUR 252, and for households with single caregivers, the median income per person was EUR 308. Overall, respondents most frequently stated an income of EUR 200-399 per person (44%), with the next highest range being EUR 400-599 (21%) and EUR 0-199 (19%). Only 15% of households declared an income per person of more than EUR 600.

In December, 14% of respondents in Poland reported sending money or in-kind support to family or friends in Ukraine during the previous month (November 2023). Those who sent support had a notably higher median income at EUR 454 per person, surpassing the overall median by over EUR 130. On the other hand, 12% of respondents in Poland mentioned that they received remittances from Ukraine as one of their income sources. This percentage is higher compared to other European countries where only 5% received remittances. Among those receiving remittances, 5% considered it their primary source of income (compared to 3% in other European countries). Notably, a substantial 61% of those who reported remittances as one of their income sources were single caregivers. This suggests that support is likely to come from a separated second parent or other family members remaining in Ukraine and kept apart due to the armed conflict.

When examining the savings capacity of households, a significant majority (92%) reported that they were unable to save any money monthly. Among the remaining 8% who reported some level of savings, median amount saved per household totaled €116 (€46 per person) monthly.

Figure 7: Proportion of Ukrainian refugee households reporting different level of income per person, in euros

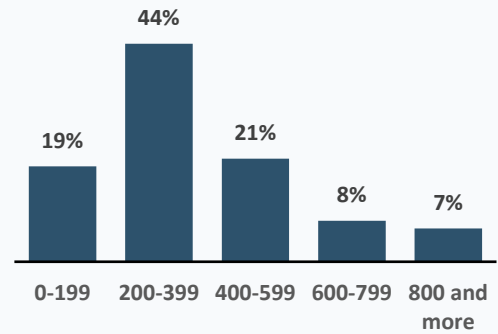
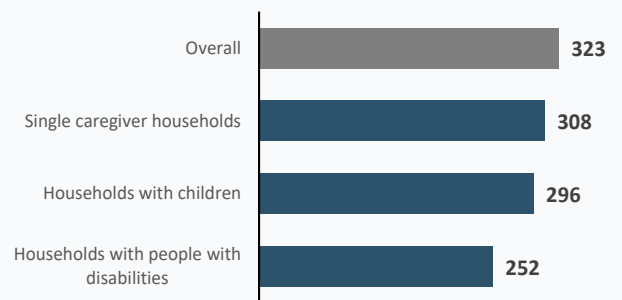


Figure 8: Median income per person in Ukrainian refugee household in Poland, euros



5. NEEDS AND ACCESS TO ASSISTANCE

Ukrainian refugees in Poland still report pressing unmet needs (60%). However, 44% also reported receiving humanitarian support from the Polish government and various NGOs.

As of Round 19, 60% of surveyed individuals in Poland reported having urgent needs. Among all surveyed respondents, 40% identified cash as their most pressing requirement. Those expressing this need had median household income per person of EUR 289 (compared to the overall median of EUR 323, or EUR 346 for those not reporting such a need). Notably, among all households with individuals with disabilities, 47% reported cash as an urgent need. Medical assistance ranked second among all needs, with

15% of respondents indicating a strong requirement for treatment or medical items. This need was most prevalent among respondents older than 65 years (32%) and households with people with disabilities (32%). Among those expressing this need, 22% attempted to access medical services in the previous month (November 2023) but were unable to do so (compared to the 8% of respondents overall who were unable to access physical or mental health services).

Material assistance (NFIs, clothes etc), reported as a need by 10% of the respondents, is the third most common need. Respondents primarily engaged in caregiving for children reported needs for material assistance at a higher rate of 18%.

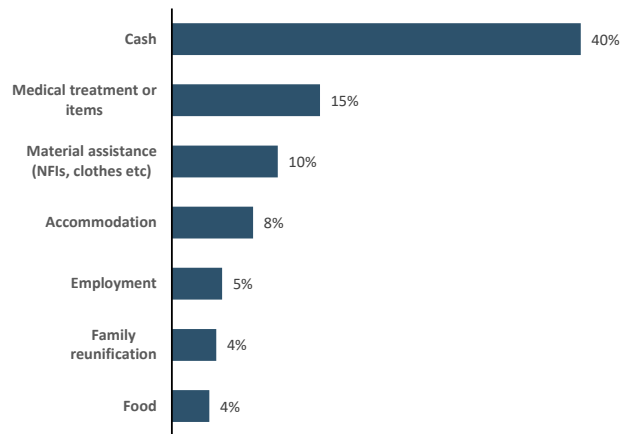
21. Income per person was calculated as the amount of income declared by the respondent for the entire household, including children and older people, divided by the number of household members. This includes, but is not limited to, salaries, remittances, government and non-government financial assistance, social benefits, etc.



In general, 44% of those surveyed in Poland said they received either material, monetary or another type of assistance from the government or other aid actors during the last month. Of those, the vast majority (89%) received assistance from the government of Poland. The assistance from all other aid actors was reported by 18% of the respondents, with Caritas most commonly mentioned (3%) followed by UNHCR, UNICEF, and the Red Cross, mentioned by 1% each. Church and religious organisations also played an important role in assistance provision, assisting 3% of surveyed Ukrainians in Poland.

Cash assistance was the most commonly received form of aid (86%), followed by food (15%), medical assistance including psychological support (6%), non-food items (5%), and shelter (housing provided by authorities, NGOs, charities, or churches, including collective centers) (5%).

Figure 9: Top 7 urgent needs in Ukrainian refugee household in Poland



SUMMARY

While the share of people renting and working has been rising, indicating a positive trend of gradual integration into Polish society, substantial challenges persist.

More than half of refugee households, especially those having members with disabilities, older people, families with children, and single caregivers, continue to face financial constraints and unmet urgent needs, more specifically the need for cash, medical treatment or items, as well as material assistance (non-food items, clothes etc). The vast majority of refugee households are unable to save any money on a monthly basis, devoting their incomes exclusively to cover the expenses. These challenges are exacerbated by job mismatches and barriers to employment for women with children, who make up most of the surveyed sample.

This highlights the ongoing difficulties faced by Ukrainian refugees in Poland and draws attention to the crucial role of continued support from both governmental and non-governmental organisations.