



# What we know about the skills and early labour market outcomes of refugees from Ukraine

6 January 2023

## Key messages

- As a result of Russia's war of aggression against Ukraine, by mid-November 2022, around 4.7 million refugees from Ukraine had registered for temporary protection in the European Union (EU). Most of the adults are women with higher-than-average educational levels compared to other refugee groups and the Ukrainian general population.
- The limited information currently available regarding the previous work experience of these refugees suggests that the vast majority were employed at the onset of the war. Among those, a non-negligible share worked in the health and education sectors.
- The labour market inclusion of Ukrainian refugees has been faster compared to other refugee groups. In a few European OECD countries, the share of working-age Ukrainian refugees in employment is already over 40% (including the Netherlands, Lithuania, Estonia, and the United Kingdom). The rate may be similar elsewhere, notably in Poland and the Czech Republic, if short-term jobs and informal employment are also considered. In other countries, the share is lower but increasing.
- Despite their relatively swift entry into the labour market, the current employment patterns of Ukrainian arrivals reflect at least in part the networks available to them rather than their actual skill profiles. As much of the early employment uptake has been concentrated in low-skilled jobs, skills mismatches are widespread. Part-time employment is also more likely for Ukrainian refugees because of childcare responsibilities.
- Given the high formal levels of qualifications, the issues of skills transferability and foreign qualifications assessments are particularly pertinent. Several countries have stepped up their recognition systems, including through better outreach and information. Countries have also eased access to regulated professions by streamlining recognition procedures or removing specific occupational requirements, notably in the health sector.

## Background and key issues

Russia's unprovoked, illegal and unjustifiable war of aggression against Ukraine on 24 February 2022 has triggered a massive displacement of people towards OECD countries. By mid-November 2022, more than 4.7 million have registered for Temporary Protection in the European Union (EU) alone. About a million more have applied to move on to non-EU OECD countries, including Canada, the United Kingdom, the United States and Israel.

Most refugees<sup>1</sup> remain in neighbouring countries to Ukraine, with Poland hosting 1.5 million. Several other OECD countries have also received high numbers of refugees, most notably Germany (1.02 million), the Czech Republic (almost 460 000), the United States (167 000), Italy (163 000), Spain (151 000), Türkiye (145 000) and the United Kingdom (141 500). Even though there is much uncertainty surrounding the length of stay, continued fighting has dimmed prospects of an early return for most Ukrainian refugees. The vast majority of them are starting to settle into host societies and the issue of labour market integration is becoming increasingly pertinent.

In contrast to previous refugee inflows, the new arrivals from Ukraine are entitled to seek employment at a much earlier stage. The Temporary Protection Directive, activated by the EU in an unprecedented move in early March 2022, grants the right to engage immediately in employment or self-employment for refugees from Ukraine. Although subject to national labour market policies, other OECD countries, including European countries not covered by the Directive, have enacted similar provisions (OECD, 2022<sup>[1]</sup>).

Finding gainful employment commensurate with refugees' educational and professional qualifications supports new arrivals in becoming self-sufficient and boosts the local economy. It also enables them to use and possibly further enhance their skills, which is crucial for the future reconstruction of Ukraine. The data suggest that a large part of adults have vocational or academic qualifications, but knowledge about their actual skills is still scarce. At the same time, there are questions regarding the transferability of these skills to OECD countries.

## First evidence on the demographic composition of Ukrainian refugees

The demographic composition of refugees from Ukraine differs from other refugee inflows. The enforcement of martial law prevents most men of conscription age (18 to 60 years) from leaving the country.<sup>2</sup> As a result, in virtually all host countries, at least 70% of the adults are women and over a third of all refugees are children (Figure 1). In some countries, the figures are even higher. In Poland, for instance, 84% of all adults are female and children account for 41% of refugees. In addition, people aged 65 and above make up a non-negligible share of the refugee population. In countries with available data, about 4-6% belong to this group.

The family composition of Ukrainian refugees poses a key challenge to their labour market integration as most of them are mothers who fled the country with their children. The absence of their partners and the exposure of their children to various stress factors in the new environment increase their care burden and make it difficult to reconcile family responsibilities with work. Even those seeking work might prioritise part-time employment, at least until they obtain access to adequate childcare services. The presence of elderly dependents, although in small numbers, can further hinder working-age individuals from taking up

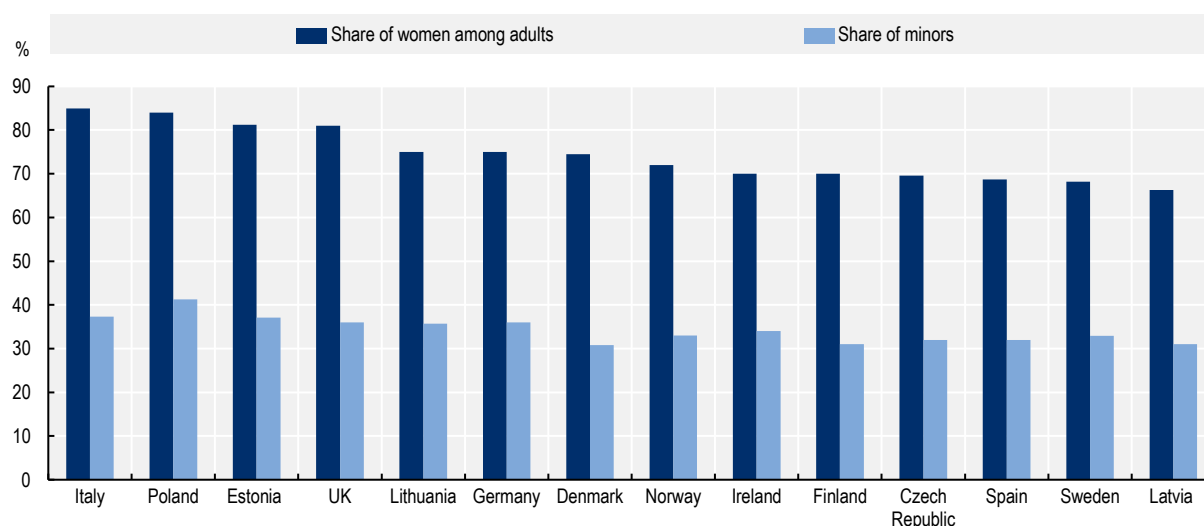
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<sup>1</sup> The term "refugee" is used in this document to include persons who obtained some sort of international protection, including not only formal refugee status (as per the Geneva Convention) but also subsidiary and temporary protection (as in the case of most refugees from Ukraine).

<sup>2</sup> Some exceptions include men who financially support three or more minors, single fathers of minors, and guardians of disabled children.

employment. By contrast, if elderly relatives are in good health and able to support with childcare functions, their presence might boost the labour market participation of single mothers (OECD, 2022<sup>[2]</sup>).

**Figure 1. Share of minors and women among registered refugees in selected countries**



## First evidence on the socio-economic profiles of Ukrainian refugees

Although there is still much uncertainty about the length of stay, refugees will gradually seek employment in growing numbers. According to the OECD projections, the inflow of Ukrainian refugees might increase the European labour force by 0.5% by the end of 2022, an impact that is twice as large as that of the 2015-17 arrivals (OECD, 2022<sup>[2]</sup>). Poland, the Czech Republic and Estonia, which are home to the highest number of Ukrainian refugees relative to population size, are expected to record the strongest increases, of around 2%. Tight labour markets and a shortage of workers in many host countries provide good prerequisites for a successful labour market integration of the refugees concerned, but much will depend on accompanying support measures. Taking stock of the existing evidence on the socio-economic profiles of the new arrivals provides an indication of the skill potentials and labour market inclusion prospects.

### **Data sources on the socio-economic profiles and possible biases**

The available evidence on the socio-economic profiles of Ukrainian refugees is still limited. To date, few refugees have registered with public employment services (PES) of their host countries, which generally collects such data. One possible reason for relatively low rates of registration is that in most countries, arrivals from Ukraine receive financial support and enjoy the right to work without prior registration at the PES.<sup>3</sup> So far, Spain is one of the few countries with available data on the socio-economic profile of most refugees recorded in the country. The Spanish authorities collect this information through four main reception centres (Ministerio de Inclusión, Seguridad Social y Migraciones, 2022<sup>[3]</sup>).

<sup>3</sup> One notable exception here is Germany, where, since 1 June 2022, a change in law entitles Beneficiaries of Temporary Protection (BTPs) to unemployment benefits under certain conditions and upon registration. As a result, registrations of Ukrainian refugees at the Federal Employment Agency have increased more than sixfold since the beginning of June and amount to 400 000 by the end of August. However, to provide assistance quickly, the data collection of the German Federal Employment Agency is still limited and does not yet include information on previous educational and professional qualifications (Federal Employment Agency, 2022<sup>[37]</sup>).

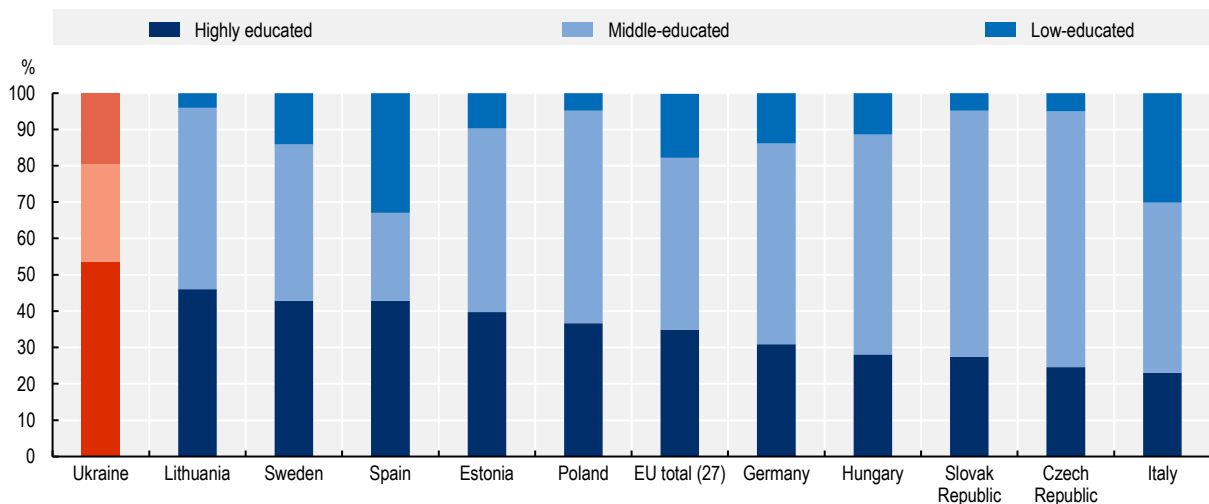
In the absence of large-scale administrative data (except for Spain), a number of surveys offer valuable first insights into the educational and professional background of refugees. Yet, these surveys are not always representative and sometimes paint a biased picture. Furthermore, educational and professional qualifications are generally based on self-reporting and might not always accurately reflect reality. In light of these potential biases, the following results should only be interpreted as indicative.

### **Educational qualifications**

The educational attainment levels in Ukraine have risen considerably since its independence in 1991, exceeding the EU average notably by 2020 (see Figure 2). Ukrainian women are overrepresented among the highly educated: 56% of working-age women completed a tertiary degree versus only 43% of Ukrainian men (Ukraine LFS, 2020).

**Figure 2. Educational attainment levels of the labour force in selected countries**

Population in the labour force, 15-to 64-year-olds



The educational classification for Ukraine is not fully comparable with ISCED-11 and comparison with the EU countries should be interpreted with caution.

Source: Ukraine LFS 2020, Eurostat 2020.

The limited evidence available, summarised in Table 1, suggests that the educational attainment of Ukrainian refugees not only considerably exceeds that of other refugee groups but also that of the Ukrainian population.

Data collected online by the EUAA and the OECD across several EU countries show that 71% of Ukrainian refugees self-declare that they are tertiary educated with most holding a Master's degree or higher (EUAA, IOM, OECD, 2022<sup>[4]</sup>).<sup>4</sup> Around one in nine also reported having graduated from vocational education and training programmes (VET). Only 8% of respondents had obtained no more than secondary education.

<sup>4</sup> The EUAA-OECD Survey of Arriving Migrants from Ukraine (SAM – UKR) surveyed 3 932 adult respondents between 11 April 2022 and 15 August 2022 online, using their mobile phones. Of these, 82% were female with a mean age of 38 years (median age of 37). The majority (79%) were aged between 18 to 44 years, followed by a fifth who were aged 45 to 64 (18%) or older (2%). The sample covers almost exclusively Ukrainian citizens (96%) with just 4% (161) being non-Ukrainian residents of Ukraine prior to 24 February 2022. This Survey may not be representative for the overall refugee population.

Similar results emerge from the second round of the UNHCR's intentions survey (UNHCR, 2022<sup>[5]</sup>).<sup>5</sup> According to this survey, more than two-thirds of refugees are tertiary educated, but the share is lower among refugees in neighbouring countries of Ukraine (73% versus 62%). Another online survey carried out by the Munich-based Ifo Institute for Economic Research found that an even higher proportion of refugees in Germany were tertiary educated (78%) (Panchenko, 2022<sup>[6]</sup>).<sup>6</sup>

Younger and better-educated people are, however, often easier to reach and more inclined to participate in online surveys. It is therefore likely that these surveys overestimate the share of highly skilled among Ukrainian refugees. Indeed, another UNHCR (2022<sup>[7]</sup>) survey,<sup>7</sup> conducted in-person, suggests that only about 48% of Ukrainian refugees have a tertiary education level. Similarly, a survey conducted by the Central Bank of Poland suggests that the share of tertiary educated refugees in the country is closer to 50% (NBP, 2022<sup>[8]</sup>).

Administrative data or information collected by public employment services are likely to offer the most accurate overview of the situation in destination countries but remain scarce. Among those registered with the Swiss PES, 64% are tertiary educated. Administrative data from Spain also confirms that the majority of Ukrainian refugees are highly educated. As of mid-November, 62% of adult refugees have a tertiary degree, 29% upper secondary or a professional qualification, 8% a secondary degree, while around 1% have no more than primary education. The educational composition in Spain has also remained remarkably stable between different waves of refugee inflows.

Similar results can be found in Ireland, although the available evidence only encompasses a specific segment of the refugee population. Among nearly 12 000 refugees who attended public employment support events in Ireland, 68% had completed tertiary education, 29% upper secondary education and 2% had obtained lower secondary education or less (CSO, 2022<sup>[9]</sup>).

The levels seem lower in other countries. In Belgium (Flanders), among the slightly less than 6 000 Ukrainian refugees registered at the PES as of November, 52% have been recorded as being tertiary educated. The results from placement interviews by the German Federal Office for Migration and Refugees also suggest lower educational levels among the Ukrainian arrivals. Among over 47 000 Ukrainian refugees participating in integration courses in Germany, only 37% had a tertiary degree, while 19% had obtained no more than lower secondary education. In the absence of further information, it is difficult to say whether this large discrepancy reflects an upward bias in the estimations of other German surveys or is due to negative self-selection of participants in such courses. The latter possibility is supported by data from the Austrian PES from May, which found that individuals with lower educational attainment were quicker to seek employment after their arrival.<sup>8</sup> Two in five of the refugees registered with the Austrian PES by the end of May had reached no more than compulsory education. Among those who obtained a work permit, the share was even larger, amounting to 70%.

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<sup>5</sup> The second round of UNHCR intentions surveys with refugees from Ukraine used a mixed methodological approach based on phone interview (1 600), web based (2000) and face to face interviews (1 245). The overall combined sample included a total of over 4 800 surveys completed between August and September 2022. 2000 surveys were carried out in countries neighbouring Ukraine and the rest in other EU countries.

<sup>6</sup> 936 persons participated from 23 May to 6 June 2022 to an online-survey conducted, mainly on social networks. Results are quite similar to another survey carried out on behalf of the Federal Ministry of the Interior for Homeland (BMI) from 24 March to 29 March based on 1936 interviews (INFO GmbH, 2022<sup>[12]</sup>; Panchenko, 2022<sup>[6]</sup>). These surveys might not be representative of the target population.

<sup>7</sup> This survey is based on the compilation of more than 34 000 face-to-face interviews conducted at border points and transport hubs (28%), reception and transit centres (19%), collective sites (11%) and assistance points in major cities (33%) in countries bordering Ukraine between May and September 2022.

<sup>8</sup> This could be due to a higher incidence of remote work for displaced highly qualified Ukrainian workers.

**Table 1. First evidence on the educational qualifications of refugees from Ukraine**

Country	Low-educated	Medium-educated	Highly educated	Population	Sample size	Date	Source
EU	8 (secondary or lower)	19	71	Refugees from Ukraine	3 932	15.8.2022	EUAA & OECD SAM-UKR survey
EU	13 (secondary or lower)	17 (VET)	67	Refugees from Ukraine	4 800	August and September 2022	UNHCR's Intentions Survey – Round 2
Neighboring countries of Ukraine	23 (secondary or lower)	25 (VET)	48	Refugees from Ukraine	34 145	May and September 2022	UNHCR's Intentions Survey – Round 1
Austria	40	24	36	Refugees from Ukraine registered at the PES	5 817	31.5.2022	AMS data (Public Employment Service)
Austria	70	19	11	Refugees from Ukraine who have obtained a work permit	3 312	31.5.2022	AMS data (Public Employment Service)
Belgium (Flanders)	16	26	58	Refugees from Ukraine registered at the PES	1 869	7.11.2022	VDAB data (Public Employment Service)
Germany	2	24	73	Ukrainian nationals who, by the end of March, have been in Germany for 12 weeks maximum	1 936	March 2022	INFO GmbH survey
Germany	19	43	37	Ukrainian refugees with a placement test to participate in an integration course	4 7542	6.7.2022	BAMF evaluation
Germany	1	21	78	Refugees from Ukraine	936	May-June 2022	Ifo online survey
Ireland	2	30	68	Refugees from Ukraine who attended employment support events	11 999	07.8.2022	Arrivals from Ukraine in Ireland Series 5, CSO statistical publication
Poland	15 (primary education, basic vocational)	35 (secondary)	50	Refugees from Ukraine	3 165	13.4-12.5.2022	Narodowy Bank Poland
Spain	9	29	62	Registered refugees from Ukraine	84 146	18.11.2022	Dashboard on the characteristics of Ukrainian refugees in Spain
Switzerland	21 (lower secondary)	15 (upper secondary)	64	Refugees from Ukraine registered at the PES	992	20.11.2022	RAV data (Public Employment Service)
United Kingdom	21		79	Selected sample from recently arrived refugees under Ukraine Humanitarian Schemes	3 094	20-27 April 2022	ONS
United Kingdom	19		81	Selected sample from recently arrived refugees under Ukraine Humanitarian Schemes	9 293	16-24 June 2022	ONS

Note: The educational categories differ across sources and are not fully comparable. With the exception of the administrative data from Spain, the samples are not fully representative and results should be interpreted as indicative.

### **Language skills**

English language proficiency tends to be relatively widespread among the Ukrainian refugee population. In the United Kingdom, for example, a relatively large share of Ukrainian refugees seems to be proficient in English (ONS, 2022<sup>[10]</sup>; 2022<sup>[11]</sup>). The UK Humanitarian Response Insight Survey held in April 2022



found that about a third of Ukrainians who arrived under Ukraine Humanitarian Schemes speaks English well or very well. This number reached 44% among those who arrived in June 2022.

In the joint online survey by the EUAA and the OECD (2022<sup>[4]</sup>), half of all respondents (50%) also reported being able to speak English. Yet, the actual share is likely to be smaller due to a potential selection bias in this survey towards younger and higher educated people. Still, 38% of refugees reported to being able to speak English in the UNHCR survey and among refugees registered at the Belgian (Flemish) PES, around 30% rated their English skills as “good” or “very good”.

However, initial evidence shows that only a small share of refugees speaks other languages. In a German survey, carried out at the end of March, only 4% of adults classified their German skills as “good” or “very good”, around one-third indicated to possess limited language skills, and 63% had no previous knowledge of the language (INFO GmbH, 2022<sup>[12]</sup>). Even fewer refugees (1.8%) among those registered with the Belgian (Flemish) PES reported to possess “good” or “very good” Dutch language skills and three out of four refugees had no previous experience with the language.

Proficiency in the language of the host country seems to be more widespread among refugees in Ukraine’s neighbouring countries with Slavic languages. The UNHCR (2022<sup>[5]</sup>) survey found that a relatively large share of refugees has some knowledge of local languages in Poland (38%) and the Slovak Republic (26%).

A lack of language skills not only makes it difficult for refugees to cope with their everyday life in a host country, but it also hampers the possibility of fully utilising their skill potential in the labour market (OECD, 2021<sup>[13]</sup>). In Ireland, two-thirds of participants of PES events identified their English skills as a challenge when seeking employment. This was particularly the case among women (71% versus 63% of men), who are more likely to work in service-related occupations (CSO, 2022<sup>[9]</sup>). Similarly, in the United Kingdom, 56% of those who declare that they “have experienced barriers to being able to take up work” indicated that their English language skills have not been sufficient to meet job requirements. The second most important issue (33%) was related to transferability and recognition of foreign qualifications (ONS, 2022<sup>[14]</sup>). In Germany, about 60% of respondents perceived language barriers as the biggest challenge in their new environment (IOM, 2022<sup>[15]</sup>). Refugees in Poland, Belgium, the Slovak Republic and Spain voiced similar concerns (UNHCR, 2022<sup>[5]</sup>). Alleviating language difficulties has thus become one of the top priorities for refugees. In an IOM survey in Poland, 43% of the respondents identified language support as one of their main needs, right after financial assistance, accommodation and employment (IOM, 2022<sup>[16]</sup>).

Several factors are expected to foster language acquisition among Ukrainian refugees in OECD countries. First, the high educational attainment levels potentially facilitate the learning of host country languages. The relatively well-educated Ukrainian diaspora in Germany, for example, has acquired comparatively good language skills in the past, although only 9% of Ukrainian migrants mastered the language before their departure (Brücker et al., 2022<sup>[17]</sup>). Second, public language training opportunities are gradually expanding (OECD, 2022<sup>[1]</sup>) and a wide range of digital learning modalities have become freely available for Ukrainian refugees. The latter can support in-class language learning or be useful during transitional phases. Yet, the great uncertainty regarding the length of stay might work against this favourable context. Refugees who intend to return are generally less inclined to invest time and effort in language learning, as this is often associated with long-term integration.

### ***Previous work experience***

Different surveys also indicate that the vast majority of refugees have a record of employment or entrepreneurship. The OECD-EUAA survey reports that 77% of the respondents were employed before they had to flee. According to the UNHCR’s intentions survey, 76% of refugees had been previously employed (UNHCR, 2022<sup>[18]</sup>). In the United Kingdom, 76% declared that they were employed when they left Ukraine (ONS, 2022<sup>[10]</sup>). Similar results emerged from two German studies (INFO GmbH, 2022<sup>[12]</sup>;

Panchenko, 2022<sup>[6]</sup>). Among those previously employed, the majority had been working full-time and around one in five had been either self-employed or an entrepreneur (Panchenko, 2022<sup>[6]</sup>).

Despite some uncertainty regarding previous employment levels of refugees, especially since they are generally self-reported, the findings suggest that activity levels seem to surpass the average for Ukraine. Prior to the war, 58% of the total population aged 15 to 70 had been employed. It is important to note though that the share had been smaller among women (45%) (State Statistics Service of Ukraine, 2020<sup>[19]</sup>).

Ukrainian refugees also seem to have worked in positions with higher skill requirements compared to the Ukrainian average. In 2020, less than two in five workers in Ukraine held a high-skilled job (State Statistics Service of Ukraine, 2020<sup>[19]</sup>). Conversely, at least half of the Ukrainian refugees reported to have worked in such a job in Ireland and Switzerland. Among them, the majority indicated to have worked in intellectual and scientific professions. Middle-skilled occupations, such as cashiers, secretaries and machine operators, were less widespread, with shares ranging from 31% in Ireland to 37% in Switzerland. Sales and services was the by far most common broad job category in this skill range, accounting for around 18% of the total professions listed. In both countries, less than 4% of the refugees reported to have worked in elementary occupations (jobs that require simple, routine tasks and often, physical effort). Overall, some tentative evidence suggests that so far, job profiles of refugee inflows from Ukraine have remained relatively constant over time.

A non-negligible share of refugees has worked in the education or health sector. Both the joint EUAA and OECD (2022<sup>[4]</sup>) and NBP's (2022<sup>[8]</sup>) surveys show that around one in ten refugees with a recorded work history had been previously employed in the educational sector. The UNHCR survey suggests an even larger share at 17% (UNHCR, 2022<sup>[5]</sup>). In June, education is also mentioned as the most common sector for those who arrived in the United Kingdom (13%), while health was mentioned by 8% (ONS, 2022<sup>[10]</sup>). Findings from Lithuania and Switzerland indicate previous experience in the education sector at 8% and 7%, respectively. Meanwhile about 8% of Ukrainian refugees in Lithuania and Spain had worked previously in the health sector, according to administrative data. Both the health and education sector tend to have country-specific entry barriers, which can complicate and potentially delay the labour integration of Ukrainian refugees qualified in these fields.

## First evidence on the labour market integration of Ukrainian refugees

For a number of reasons, amassing comparable and comprehensive information on the labour market outcomes of beneficiaries of temporary protection (BTPs) remains a challenge. Firstly, the usual tools for monitoring outcomes, such as the labour force surveys, are currently inappropriate as their sampling frame does not cover the recently arrived Ukrainian population. Secondly, when administrative data from host countries is available, it is often not possible to make a full distinction between Ukrainian nationals who lived in the country prior to 24 February and BTPs. Thirdly, the main available data in several countries is related to employers' notifications of new Ukrainian hires, which can result in multiple records for single individuals in the case of short-term and part-time employment. Also informal employment is obviously not covered by such data.

Some countries already provide social security administration data for BTPs, making more accurate labour market integration assessments possible. Such data, however, may not cover all employment categories. In Germany, for example, short-hour and part-time employment of Ukrainians are not included in social security data. Similarly, possible international teleworking arrangements (notably with Ukrainian companies) would not be recorded.

Moreover, there is often significant uncertainty about the reference population used, preventing from computing reliable employment rates for Ukrainian refugees in most countries. Not only is information on the share of working-age Ukrainian refugee population often lacking, but more importantly the number of



registered BTPs may not reflect the actual number of adults in the country at any specific point in time as many refugees are commuting between Ukraine and the host country or have left the country without deregistering.

## **Employment**

With the caveats mentioned above in mind, early evidence regarding the labour market inclusion of Ukrainian refugees indicates that their entry to the labour market has been faster than for other refugee groups in the OECD.

In Poland, as of early October, more than 400 000 employers' notifications had been received in connection to hiring Ukrainian nationals. Some of them may have been in the country prior to 24 February, but in any case, this reflects a fourfold increase since early May. Over the same period, about 180 000 Ukrainians with a PESEL number registered in the social security system, most of whom would be BTPs. This number can be compared to the working-age population of Ukrainian BTPs in the country, suggesting a formal employment rate of around 25%. Many more Ukrainians, however, are believed to be working informally or remotely in the country. The figures from the Czech Republic are more moderate, showing that about 57 000 Ukrainian refugees are recorded as employed (suggesting an employment rate of at least 20%).<sup>9</sup>

In the Baltic countries, the situation seems to be more favourable. In Estonia, about 8 200 people have found a job out of 20 000 working-age Ukrainians registered as BTPs in the country (41%). Lithuanian authorities are reporting that as much as 19 700 Ukrainians are already employed (close to 50% of working-age adults).

The labour market situation of Ukrainian refugees is also encouraging in Ireland and the United Kingdom. In Ireland, latest data from October show that 9 228 persons had earnings from employment (with a mean weekly salary of EUR 377) (Central Statistics Office, 2022<sup>[20]</sup>). The most common sector of employment was wholesale, transport and accommodation at 52%. This should be compared to the 28 000 working-age Ukrainian BTPs, corresponding to an employment rate of 32%. In the United Kingdom, the situation has also improved very rapidly. The UK Humanitarian Response Insight Survey (ONS, 2022<sup>[10]</sup>; 2022<sup>[11]</sup>; 2022<sup>[14]</sup>) found that the employment rate of those who entered the country under the Ukraine Humanitarian Schemes has reached 42% in August for those arrived in March/April and 56% in November for those arrived by June. The proportion of those having a UK bank account has increased to 97% in November from 43% in April.

Labour market inclusion has been also impressive in Denmark. As of October, 6 100 Ukrainians with a valid residence permit and work authorisation have found employment (employment rate of 53%, up from 19% in April) (Danish Agency for Labour Market and Recruitment, 2022<sup>[21]</sup>). The Netherlands, however, reports the highest levels of employment among Ukrainian BTPs as the latest number of notifications totalled at 46 000. According to the social security agency UWV (2022<sup>[22]</sup>), even if one accounts for double reporting and for people who are no longer in employment, there could be up to 40 000 Ukrainian BTPs working in the Netherlands compared to working-age population of 55 000.

Spain has robust administrative data on labour market inclusion of BTPs. By September 2022, more than 13 000 Ukrainians BTPs had been registered as employed in the social security system (Ministerio de Inclusión, Seguridad Social y Migraciones, 2022<sup>[23]</sup>). Depending on the total number of working-age Ukrainians in the country, based on various assumptions on return migration, the employment rate would be between 18% and 38%.

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<sup>9</sup> In the Slovak Republic, the reported employment rate of Ukrainian refugees is notably lower, amounting to around 13%. However, these figures date back to May and the actual rate can be expected to be higher as of November 2022.

Progress has been slower, yet still visible in other European countries. In Switzerland, for example, the share of working-age Ukrainian refugees in employment reached 13.7% in November up from around 2.5% in May (Figure 3). In Germany, it is more difficult to estimate the employment rate. Many Ukrainian refugees are in short-hour and part-time employment and are expected not to be registered in the social security system. Between the end of February and July, the number of Ukrainians making social security payments rose to only 45 000 out of potential 640 000. However, the Ifo Institute interviewed almost 1 000 Ukrainian refugees in June and found that 90% of respondents would like to find employment in Germany and about a quarter of them have managed to do so already (Panchenko, 2022<sup>[6]</sup>).

**Figure 3. Ukrainians with protection status ‘S’ in employment in Switzerland**



Source: State Secretariat for Migration (2022<sup>[24]</sup>), Persons with Protection Status ‘S’ in employment, <https://www.sem.admin.ch/sem/en/home/asyl/ukraine/statistiken.html>.

There are clearly notable differences between OECD countries, deriving among other factors from differences in the overall labour market situation, specific demographic composition of Ukrainian arrivals, as well as the support available both from the state and existing Ukrainian communities in each country. That notwithstanding, a large part of observed differences could stem from disparities in methodologies and reporting that has been already discussed above. The variability in outcomes, however, should not hide the fact that Ukrainian refugees are already integrating into the labour market of their host countries at a much faster rate than all other refugee groups as, on average, it has taken five to ten years to have at least half of refugee arrivals in employment.

### **Job categories**

A key question for the labour market integration for refugees, which is particularly pertinent in the case of Ukrainians due to their high educational attainment levels on average, is how to strike a balance between an early labour market entry and the need to ensure sustainable employment commensurate with their skills. Low-skilled occupations tend to be more accessible because the issue of the transferability of skills is by definition less relevant, as is the mastery of host country’s language. What is more, there is some evidence that recruiting difficulties across the EU tend to be more acute in low-pay sectors (e.g. accommodation and food services) (OECD, 2022<sup>[25]</sup>). Furthermore, refugees in some countries may rely on pre-existing professional networks of earlier Ukrainian arrivals who often worked in physically

demanding and lesser-skilled jobs (OECD, 2022<sup>[21]</sup>). While these jobs might be easily accessible to refugees, they are often in sectors and at skill levels that do not match their own. Given the average skill profile of Ukrainian refugees, the risk of overqualification, i.e. possessing higher qualifications than those required by the job, is thus high in the current situation.

Indeed, current employment patterns seem to reflect at least in part the networks available to refugees. In Spain, for example, as of May, Ukrainian refugees are concentrated in sectors that managed to attract relatively high numbers of Ukrainian migrants in the past, including hospitality (30%) and construction (10%). Hospitality is one of the most common sectors of employment for Ukrainian refugees in a number of countries with available data, including Austria, Bulgaria, Denmark, Switzerland and Ireland. Other sectors with a comparatively large share of Ukrainian refugee employees include agriculture, manufacturing, wholesale and retail trade as well as the education sector.

According to the data from the Polish Ministry of Family and Social Policy, as of the end of April, around half of the refugees worked in an elementary occupation (Ministry of Family and Social Policy, 2022<sup>[26]</sup>). In Latvia, about 40% of those employed work in elementary occupations. A study from the Slovak Republic from the same period paints a similar picture for employed Ukrainian women and identifies substantial skill mismatches. Although one in three refugees working in the country is tertiary educated, only 4% work in an occupation requiring this level of qualification. Furthermore, two in five Ukrainian women in the Slovak Republic accepted a job that can be performed with primary education, although virtually all (96%) have at least secondary education (Hábel and Veselková, 2022<sup>[27]</sup>).

Among the respondents of the UK Humanitarian Response Insight Follow-up Surveys (ONS, 2022<sup>[10]</sup>), more than half of employed adults (63%) indicated not working in the same sector as they had worked in Ukraine in June, with the figure rising further by November (65%). The main reasons for this provided were taking any available job (44%), insufficient language skills requirements (39%), and their qualifications not being recognised (17%). As of June, their most common sectors of employment in the United Kingdom were accommodation or food service (29%), manufacturing (8%), and wholesale and retail trade (8%).

In the Netherlands, the importance of temporary agencies in hiring has been stressed. This has had an impact also on the types of jobs offered. As of July, about 48% of employers' notifications suggested that Ukrainians had found work through employment agencies and mainly as production workers, cleaners and warehouse workers. Likewise, nearly 40% were employed by temporary employment agencies in Belgium (Flanders).

Skill mismatches also appear to be common among refugees in the Czech Republic. Findings from July show that more than two in five Ukrainians working for the Czech employers have jobs that are significantly more low-skilled than those held in Ukraine (generally dropping from specialised positions to unskilled manual work) (PAQ Research, 2022<sup>[28]</sup>). Similarly, early evidence from Germany and Flanders (Belgium) suggests that a high proportion of refugees in these areas expect to work in a job that would require only lower levels of formal qualifications than they actually possess. In Germany, nearly one in three refugees with an intention to stay anticipate working below their qualifications or already do so (Panchenko, 2022<sup>[6]</sup>).

Simultaneously, temporary contracts and part-time employment have been widespread among the refugees employed at least initially. Early evidence from May suggested that among those in employment, around 30% held part-time jobs Austria. The prevalence of part-time and temporary employment remains high. In Switzerland, more than half of those employed work part-time. In the United Kingdom, about one-third has a temporary job (ONS, 2022<sup>[10]</sup>).

In principle, a swift labour market entry is welcome. It allows refugees to rebuild their livelihoods and potentially provides a space where they interact with the host society. It also saves money for the public purse and thereby contributes to a better acceptance in the host country. However, there is a risk that refugees will be trapped in low-skilled positions due to lost training opportunities, skill depreciations, reduced job search efforts or other reasons. There is evidence that overqualification is quite persistent, in

particular among immigrants (Joonas, Gupta and Wadensjö, 2014<sup>[29]</sup>). Against this backdrop, policy makers need to closely monitor the current situation and ensure that skill mismatches do not perpetuate.

The early labour market entry of refugees, especially when it concerns lower-skilled jobs, should be accompanied by training opportunities and continued counselling to facilitate the transition into sustainable employment commensurate with their education and skills. At the same time, there are also some early signs of an emerging bifurcation in labour market outcomes in some countries (such as Poland) where alongside elementary occupations, Ukrainians are being employed in highly skilled sectors with little in-between, leading to very different labour market experiences among the refugee population. Such developments should be followed closely. It is clear, however, that not all refugees will be able to find work that matches their skill profile, and some expectation management is needed in this context.

## Policy responses

Labour market integration of migrants and refugees has been made a priority over the last decade in many OECD countries. Consequently, some countries have been able to rely upon their existing refugee and mainstream integration systems, perhaps only tailoring the approaches to better consider the specific demographic profiles of the new arrivals. In other cases, especially in Central and Eastern European OECD countries, host governments have had to scale up both their reception and integration activities significantly to support the new arrivals.

### *Job search support*

While the right to work for refugees from Ukraine is covered by the Temporary Protection Directive in the EU countries and by similar provisions in many other OECD countries, host communities often provide additional support to facilitate their job search. Many countries have reviewed their PES support measures to better meet the needs of new arrivals from Ukraine, if only in terms of outreach and translation. The Austrian PES, for example, offers counselling services in Ukrainian, while the PES offices in Luxembourg and Portugal created new units dedicated to BTPs from Ukraine.

Ensuring successful labour market matching has been a particular focus in many host countries. Canada, Estonia, Poland, Portugal and Germany among others have set up online portals to better connect refugees with potential employers and available jobs (see Box 1). In Portugal, the National Institute of Employment and Vocational Training also mobilised a task force to ensure a more efficient matching of the needs of companies and the skills of Ukrainian refugees (OECD, 2022<sup>[11]</sup>).

#### **Box 1. Surge in digital tools to assist with job-matching**

A growing number of OECD countries are using digital tools with varying degrees of in-built matching systems to facilitate Ukrainian refugees' labour market integration. Alongside easing labour market entry, such tools can also promote more skill-appropriate employment to minimise skills mismatch and underemployment, especially in the context of relatively higher qualification levels and expected digital literacy of Ukrainian refugees.

In June, Poland launched their *Praca w Polsce* ("Work in Poland" portal to support Ukrainians in finding employment, commensurate with their qualifications ([www.pracawpolsce.gov.pl](http://www.pracawpolsce.gov.pl)). Ukrainian refugees can use it to provide information about their education, qualifications and previous employment, which is then anonymised and made accessible to Polish employers. Data on the portal is protected and logging in is possible only with the use of a trusted profile, which is an identity verification method on

the websites of the Polish state administration. Ukrainian citizens can set up a trusted profile together with a PESEL number for free. As of November 2022, there are over 250 000 job offers on the platform.

In some cases, countries have adapted existing digital structures to better meet the needs of Ukrainian arrivals. In Canada, the government launched Job Bank's Jobs for Ukraine initiative (<https://www.jobbank.gc.ca/findajob/resources/jobsforukraine>), where both Ukrainian jobseekers and interested employers could register their interest. The Job Bank facilitates matching and also provides additional information on foreign credential recognition needs as well as relevant assessments.

Portugal has also developed a specific platform that gathers Ukrainian profiles and available job opportunities with a range of support services (<https://www.iefp.pt/portugal-for-ukraine>).

At the EU level, the European Commission has developed a web-based EU Talent Pool for displaced people from Ukraine, following a scenario developed by OECD (2022<sup>[30]</sup>). It allows BTPs to identify and map their skills and facilitates their matching with EU employers ([https://eures.ec.europa.eu/eu-talent-pool-pilot\\_en](https://eures.ec.europa.eu/eu-talent-pool-pilot_en)). It is being piloted in selected EU countries, including Spain, Lithuania and Finland. The existing EURES mobility platform will be used to map and match the skills and qualifications of BTPs with potential employers locally (European Commission, 2022<sup>[31]</sup>).

Other public employment services have created information pages for Ukrainian jobseekers. The Estonian Unemployment Insurance Fund mediates vacancies through an online expo portal (<https://www.onlineexpo.com/en/work-for-ukraininas-in-estonia>), where interested employers can advertise jobs and additional support (e.g. practice job interviews with feedback in either English or Ukrainian) is also provided. Sometimes such pages are, however, only available in the host country language and not always identifying specific job opportunities for Ukrainians (e.g. France, <https://www.pole-emploi.fr/international/mobilite-internationale/toutes-les-actus/vous-etes-deplaces-ukrainiens-tr.html>).

Alongside official tools, many ad-hoc matching pages have also sprung up on social media with private citizens and business owners offering job opportunities to Ukrainian refugees (e.g. [Jobs4UKR](#), [AdeccojobsforUkraine](#), [jobaidUkraine](#), [JobsforUkraine](#), [EU4UA](#) etc.). Although these initiatives are generally well-intentioned, the quality of information is often difficult to assess. There are also several risks associated, including falling victim to traffickers targeting these sites or engaging in undeclared work. Due to limited financial resources, language barriers and lower awareness of their rights in host countries, refugees are in a particularly vulnerable situation.

Several countries and international organisations have taken steps to mitigate these risks. The Czech Republic, for example, announced measures to strengthen its labour inspection capacities, and the European Labour Authority (ELA) assists EU countries in translating awareness material (ELA, 2022<sup>[32]</sup>). Furthermore, Europol has enhanced checks to detect possible infringements of Employment Law in relation to job offers advertised on such sites (Europol, 2022<sup>[33]</sup>).

Entrepreneurship is another vehicle for an effective economic integration of refugees and some host countries as well as the private sector provide trainings and information on this. In Ireland, Ukrainian refugees can participate in a start-up training programme. In Poland, refugees can access free consulting services on starting a business in a centre (Diia.Business in Warsaw), an initiative supported by the Ukrainian Government. Other host countries provide subsidies to Ukrainian businesses that want to expand their activities to the host country (for example, Lithuania).



## Assessment and recognition of skills

As a large share of refugees from Ukraine have high formal credentials, early assessment and recognition of their skills and qualifications are key to allow them to work in their field of expertise. As there is exchange between origin and host authorities, most refugees can provide full or at least partial documentation of their credentials, facilitating the recognition process substantially. Yet countries might face difficulties when dealing with missing documentation as well as recognising uncredited informally or non-formally acquired competences and skills. Furthermore, in spite of co-operation with Ukraine, verifying the authenticity of academic documents can be challenging at times. The digitalisation of student data as well as the support of the Ukrainian authorities have proven particularly helpful in this context, but continued fighting has increased response times.

The assessment and recognition of refugees' skills has been high on the integration policy agenda already prior to the current influx, and many countries have stepped up their systems in recent years (OECD, 2017<sup>[34]</sup>). To better correspond to the needs of Ukrainian refugees, most countries adapted previous tools, notably in terms of translation, and some have implemented new measures.

Prior to the validation and recognition of qualifications, several countries conduct skills assessments to identify relevant validation, training or employment opportunities. The Austrian PES expanded its existing competence checks, through which it evaluates and documents a broad set of skills. Germany relies on its existing computer-based testing tool MySkills to assess informal skills. The German Chamber of Commerce and Industry and the Chamber of Trade jointly offer an initial assessment of vocational qualifications, work experience and language skills specifically designed for refugees from Ukraine. The outcomes of this consultation serve as a basis for further career support as well as placement activities (DIHK, 2022<sup>[35]</sup>). Furthermore, the European Commission launched a Ukrainian version of the EU Skills Profile Tool for Third Country Nationals (TCNs). This free webtool helps to map the skills and qualifications of TCNs and gives personalised advice on further steps.

Ukrainian refugees can also obtain internationally standardised documents such as the European Qualifications Passport for Refugees or the UNESCO Qualifications Passport. Based on an assessment of the available documentation and a structured interview, these tools provide credible information on refugees' academic and professional qualifications as well as language proficiency.

Several countries have taken steps to simplify and speed up the recognition of academic qualifications obtained in Ukraine. In Norway, for instance, Ukrainians with a tertiary degree can get their education recognised through automatic approval and without an official assessment of individual educational documents. They obtain a standardised statement describing the Norwegian degree to which their degree may be equated (NOKUT, 2022<sup>[36]</sup>). Austria amended its Recognition and Assessment Law so that in the absence of documentary evidence, BTPs benefit from the same remedial measures in the recognition procedure as recognised refugees. Similar changes have been introduced in the Czech Republic. Portugal applies a case-by-case assessment that allows authorities to waive the need to hand in diplomas, certificates or other academic documentation by temporary protection recipients.<sup>10</sup> Several other OECD countries, including Hungary and Spain, have waived administrative fees related to recognition procedures for BTPs.

At the EU level, the European Commission issued recommendations to ensure swift, flexible and fair recognition procedures of academic and professional qualifications obtained in Ukraine. Together with the European Training Foundation, it also set up a resource hub with vast information on the Ukrainian education system as well as on recognition procedures in EU countries (European Commission, 2022<sup>[31]</sup>). The ENIC/NARIC network, bringing together **national information centres** on academic recognition of

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<sup>10</sup> Portugal has created a dedicated webpage for this: <https://www.dges.gov.pt/recon/formulario>.



qualifications in **55 countries**, has developed a dedicated page to facilitate the sharing of information on Ukrainian qualifications.<sup>11</sup>

The issue of credential recognition is particularly relevant in connection to regulated professions, where it is a prerequisite for exercising the profession. As seen above, many refugees from Ukraine have worked previously in such occupations, especially the health and education sector. One way in which countries have tried to ease access to regulated professions is by removing qualification requirements or expediting evaluations. Lithuania exempts BTPs from mandatory language requirements for several jobs (including teaching) for a period of two years. Employers there are free to decide whether BTPs meet the language requirements necessary for the job (OECD, 2022<sub>[11]</sub>). Austria is allowing Ukrainian teachers to assist in its schools without a prior knowledge of German and Germany has lowered documentation requirements for teachers. To meet shortages in the health sector, Spain, Italy, Poland and the Slovak Republic have facilitated the access of medical personnel to their labour markets (OECD, 2022<sub>[11]</sub>).

## Conclusion

Nine months since the start of the invasion and with no immediate end to the war in sight, the labour market integration of refugees from Ukraine is becoming an increasingly pertinent issue. Registration with public employment services in receiving countries is growing but still partial, and there are still large data gaps regarding socio-economic profiles and labour market inclusion.

Regardless, existing evidence indicates that the situation is very different from previous refugee crises in OECD countries, including the 2015-17 inflows. Not only do refugees from Ukraine possess higher formal qualification levels than most other refugee groups, but they also benefitted from the support of large diaspora networks in host countries and had immediate access to the labour market. A number of specific challenges however remain. Notably, the majority of refugees from Ukraine are women with accompanying children, who often face difficulties in balancing work with family responsibilities. Higher educational levels also increase the risk of underemployment and skills mismatch. In addition, the possibility of return raises questions regarding the optimality of investments in host-country specific skills or lengthy recognition processes of foreign qualifications. It may reduce the incentive for language learning and country specific adaptation among the new arrivals, which are important for successful labour market integration in the longer term.

The Ukrainian refugee crisis can be expected to leave a lasting impact on integration systems in OECD countries, especially in Central and Eastern Europe. Overall, OECD countries have responded quickly to the crisis, granting refugees from Ukraine not only immediate access to their labour markets, but also supporting their integration through a range of instruments, including access to language training and facilitations for credential recognition. Yet further measures can support their labour market integration, notably regarding bridging courses and addressing further upskilling needs, which are worthwhile investments to enhance the employability of refugees. Furthermore, the provision of adequate childcare facilities is key to allow mothers with young children to participate in such training and take up employment. While reception countries report growing shares of refugees in employment, early evidence also suggests that skills mismatches are widespread. Moving forward, it is crucial that countries further reduce barriers that hinder refugees from unfolding their skill potential. Early skill assessments as well as speedier and streamlined recognition processes improve the chances of refugees to find a job commensurate with their skill profile (OECD, 2017<sub>[34]</sub>). This way, their skills are not left idle and continue to be built. While this is beneficial for both refugees and host economies, it is also important for the future reconstruction of Ukraine.

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<sup>11</sup> Regularly updated information is available here: <https://www.enic-naric.net/page-ukraine-2022>.

## What are the key considerations for policy makers?

- Alongside providing mainstream labour market integration support, host countries should consider also implementing targeted measures that take better into consideration the specific needs and challenges of refugee women (e.g. care obligations, gender-based violence).
- Much of the early employment uptake has been concentrated in low-skilled jobs, making skills mismatches widespread. Host countries should introduce measures to promote skill-appropriate employment of Ukrainian refugees rather than any gainful employment.
- Given the high formal levels of qualifications among Ukrainian refugees, the issues of skills transferability and foreign qualifications assessments are particularly critical for achieving these goals. It is crucial that countries reduce barriers that hinder refugees from unfolding their skill potential by ensuring the accessibility of early skill assessments and speedy recognition procedures.
- Language skills also remain an obstacle for successful labour market integration. While English seems to be quite widespread among Ukrainian refugees, only a small share of refugees speaks the language of the host country other than English.

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