



POLAND

India-Europe Labour Migration

January 2023

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Acknowledgment

This report is a part of the IOM Development Fund (IDF) supported project titled 'Strengthening Data Informed and Migrant Centred Management Frameworks in India'. This project is a joint endeavour of IOM India with the erstwhile India Centre for Migration, now the Centre for Migration, Mobility and Diaspora Studies (CMMDS) of the Indian Council of World Affairs, Ministry of External Affairs, Government of India and the Global Migration Data Analysis Centre (GMDAC).

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Abbreviations

EEA	European Economic Area
EU	European Union
GDP	Gross Domestic Product
GUS	Central Statistics office of Poland
ICM	India Center for Migration
ICWA	Indian Council of World Affairs
ILO	International Labour Organization
IT	Information Technology
MEA	Ministry of External Affairs, India
MIPEX	Migrant integration Policy Index
NGO	Non-Governmental Organization
OECD	Organization for Economic Cooperation and Development
PZPB	Polish Association of Construction Employers
TCN	Third Country Nationals
WHO	World Health Organization

Executive Summary

This research was conducted as part of the IOM Development Fund (IDF) supported project titled “Strengthening Data Informed and Migrant Centred Migration Management Frameworks in India.” It is a joint endeavour of IOM India with the erstwhile India Centre for Migration, now the Centre for Migration, Mobility and Diaspora Studies (CMMDS) of the Indian Council of World Affairs, Ministry of External Affairs, Government of India and the Global Migration Data Analysis Centre (GMDAC). The research aimed to develop an understanding of emerging corridors for international labour migration from India, particularly in Europe. India Migration Now, a venture of the South East Migration Foundation, was contracted to undertake the relevant secondary research, conduct key informant stakeholder interviews, and develop the country and sector-specific reports.

This report serves as an in-depth country profile on Poland, exploring the labour market conditions, skill shortages, the impact of the COVID-19 pandemic and the existing policy ecosystem governing immigration to the country. A thorough literature review helped develop a general understanding of Poland’s labour market by looking at the economic profile, demographic and migration trends, key sectors of interest and mobility pathways to Poland. Following this, a more detailed policy review was conducted focusing on bilateral agreements, national and sub-national level policies and the long term labour market impacts of COVID-19. This literature and policy review enabled us to develop a holistic understanding of Poland’s labour market and its migration corridor with India.

Furthermore, this report provides a qualitative understanding of the Polish labour market by presenting perspectives and recommendations from sectoral stakeholders in India and Poland. These stakeholder consultations were conducted in India and Poland from November 2021 to March 2022. An initial stakeholder mapping was conducted to identify various categories such as government departments, multilateral agencies, employer associations, trade unions, research organizations and experts. Furthermore, members of the Indian diaspora, working professionals and students alike, were included in the stakeholder consultations to gather their personal experiences of migrating to Poland. The stakeholder consultations were used to obtain more insights into the Polish labour market and validate the literature and policy review findings. A total of 21 stakeholder consultations were completed, including interviews with Indian stakeholders whose insights were relevant to the Poland country report.

Key Findings from the Stakeholder consultations

Labour Shortages and Key Sectors of Interest in Poland

- Poland is facing cross-sectoral labour shortages due to the combined effect of population ageing and the emigration of Polish nationals to other countries.
- Sectors such as agriculture, construction, hospitality, transport, logistics, and care, as well as high skill industries such as IT and healthcare, are facing shortages that immigrants from neighbouring countries have serviced.

Labour Market

- Ukraine and Belarus were the dominant migrant sending countries, but other countries, including Moldova, Georgia, and Russia, are also important.
- Among Asian countries of origin, China and Vietnam have been significant over the last few decades as emerging nations such as Nepal, India, and Bangladesh.
- The recent conflict in Ukraine has sharply increased the number of Ukrainians in Poland. The stakeholders expect such a development to impact immigration from other countries now that Poland will have a significant potential labour force with strong cultural and linguistic connections with the local population.

Role of Indian Immigrants

- India is a relatively smaller immigrant community in Poland but has strong roots in both business (wholesale, hospitality) and the education sector. They also play an important role in retail businesses, restaurants and catering, and sectors like IT.
- Semi-skill and temporary positions in sectors like manufacturing, construction, and administrative services have been associated with Indians recently, and the number of permits issued has sharply increased over the last 3 years.
- However, given the new influx of Ukrainian refugees, sectors such as IT and business may be the best future avenues for Indians.
- Student migration continues to be an important route for Indians, given the availability of English education and the relaxation of regulations around part-time work for students.

Challenges faced by stakeholders

- Due to the relatively negative public attitudes towards immigration, the government has been slow to act on the growing labour shortages.
- A comprehensive migration policy is yet to be officially endorsed.
- Since the Ukrainian refugee population is now expected to help counter some of the existing shortages, such a policy for other immigrant groups at the government level may not be a reality for a while.
- Private sector federations and the recruiting fraternity present a compelling alternative for bilateral cooperation for source countries such as India.

Integration of Foreign Workers

- Poland lacks a comprehensive integration policy for immigrant communities.
- Some challenges highlighted were culture shock, lack of language skills, and discrimination faced by the community (although this is less experienced in well-known migrant-destination cities like Warsaw, Krakow, Wroclaw, and Gdansk).
- For short term immigrants and those viewing Poland as a transit destination as they seek to migrate elsewhere in Europe, challenges of family reunion and long term integration are less relevant.
- The importance of cooperation with the existing diaspora associations in mitigating these challenges was highlighted by stakeholders.

1 | Economic and Demographic Profile

1.1 Economic Activity & Key Emerging Sectors

Widely considered a development success story, Poland, which liberalised post the fall of the Soviet Union in 1989, has seen tremendous economic growth in the past three decades, moving from a middle to a high income classification in 15 years.¹ One of the only countries across the world to register positive growth in the immediate aftermath of the 2008 financial crisis, Poland is currently the 6th largest economy (by GDP) in the European Union, surpassing nations such as Belgium and the Scandinavian countries.² The country also experienced a relatively lower economic setback during the COVID-19 pandemic, which has impacted countries worldwide. In 2020, Poland experienced a GDP contraction of 3.5 per cent compared to the 5.5 per cent OECD average, and its unemployment rates stood at the lowest in 2021 (3.1%) according to Eurostat data, a fact partially credited to the role of manufacturing in comparison to services in its economy.³

Poland ranks 35th in the Human Development Index (0.8), having seen a steady improvement between 1990-2020, with 16.3 expected years of schooling, a Gross National Income of 31623 USD (PPP), and an inequality adjusted HDI of 0.813.⁴ The country ranks 40th with a score of 76.4 on the World Bank's 2020 Ease of Doing Business Index⁵ but has gone down a rank in the Rule of Law Index with an overall score of 0.66 and a global rank of 28th. As per the latest available data from World Bank statistics, the services sector accounts for 57.6 per cent of Poland's GDP, employing 59 per cent of the active population. The industry sector contributes to 28.6 per cent of the GDP (employing 32%), and agriculture contributes to 2.3 per cent of the GDP (employing 9%). Some of the major sectors responsible for economic growth in Poland include manufacturing, construction, energy, mining, transport & logistics, agriculture, retail, and business services. However, they all need productivity improvements and are threatened by a “demographic squeeze” – the prospect of an ageing population and a shrinking domestic working population.⁶

1 World Bank (2017), Lessons from Poland, Insights for Poland, Retrieved from: <https://openknowledge.worldbank.org/handle/10986/28960>.

2 World Bank Statistics (2020), Retrieved from: https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=EU&most_recent_value_desc=true.

3 Bukowski & Paczos (2021), Why is Poland's economy emerging so strongly from the pandemic? LSE Blogs & Notes from Poland, Retrieved from <https://blogs.lse.ac.uk/europpblog/2021/05/19/why-is-polands-economy-emerging-so-strongly-from-the-pandemic-a-comparison-with-the-uk/>.

4 UNDP (2020), Human Development Report 2020, Retrieved from: <http://hdr.undp.org/en/content/latest-human-development-index-ranking>.

5 World Bank (2020), Doing Business 2020. Retrieved from: <https://www.doingbusiness.org/content/dam/doingBusiness/country/p/poland/POL.pdf>.

6 McKinsey (2015), Poland 2025: Europe's New Growth Engine, Retrieved from: https://www.mckinsey.com/~media/mckinsey/business%20functions/economic%20studies%20temp/our%20insights/how%20poland%20can%20become%20a%20european%20growth%20engine/poland%202025_full_report.ashx.

The latest report on labour statistics from the Central Statistical Office of Poland (GUS)⁷ highlights manufacturing, construction, trade and motor vehicle repair, transportation and storage, accommodation and catering (hospitality), financial and insurance activities, education, and healthcare as the sectors with job vacancies between 2019-present. Manufacturing and construction, with 21,000 and 8,900 vacancies, were the highest. It is further highlighted in the Occupational Barometer, a report produced annually by the Ministry of Family, Labour, and Social Policy. It provides a regionally disaggregated listing of shortage, surplus, and balanced occupations. The latest Occupational Barometer points to construction, manufacturing, healthcare, transport & logistics, and education as sectors where shortage occupations are concentrated. At the national level, shortage occupations for 2022 included 29 occupational categories⁸ ranging from sectors like care work, construction, manufacturing, education, and logistics and including professions such as accounting and bookkeeping clerks, ambulance workers, bakers, bricklayers and plasterers, bus drivers, concrete placers, concrete finishers and related workers, construction installation assemblers, handicraft workers in wood joineries, independent accountants, medical doctors, social work professionals caring for the elderly and disabled, stock clerks, teachers for practical vocational training, and truck drivers⁹

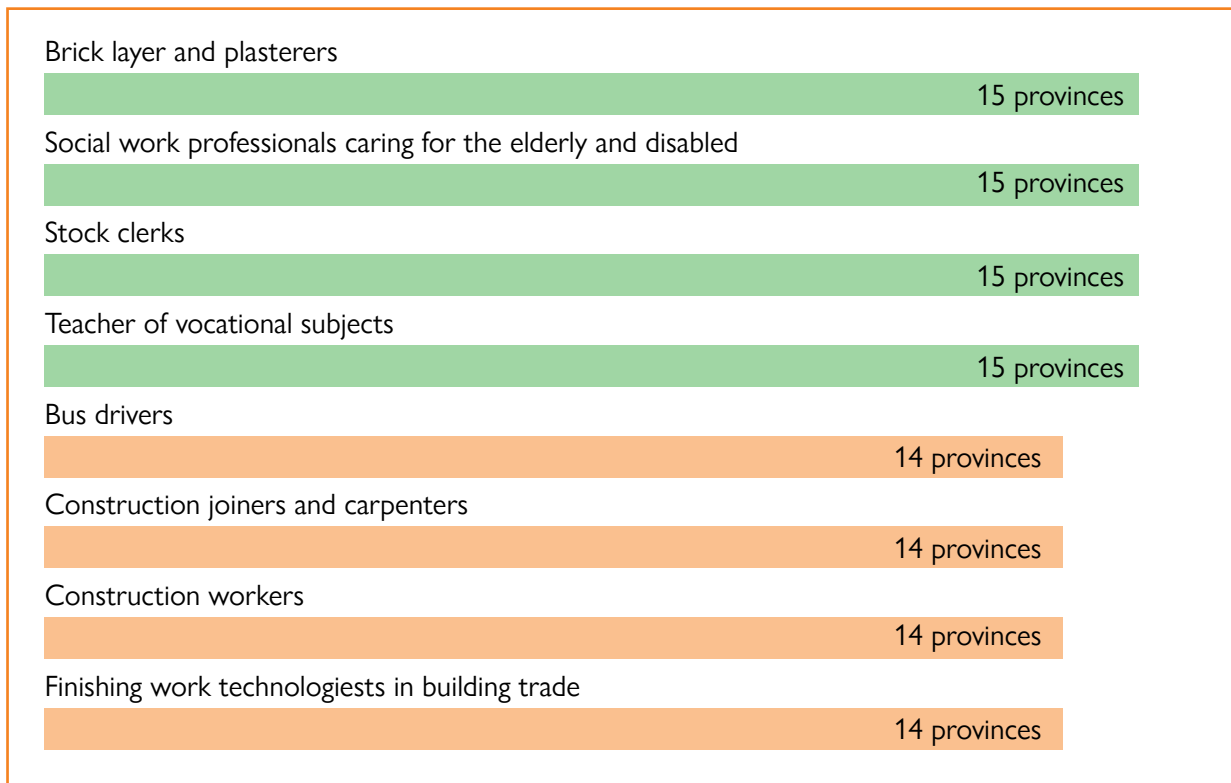
Figure 1: Most Prevalent Shortages Across Provinces, Occupational Barometer 2021



7 Yearbook of Labour Statistics 2021, Central Statistical Office, Poland (GUS), Retrieved from <https://stat.gov.pl/en/topics/statistical-yearbooks/statistical-yearbooks/yearbook-of-labour-statistics-2020,10,8.html>.

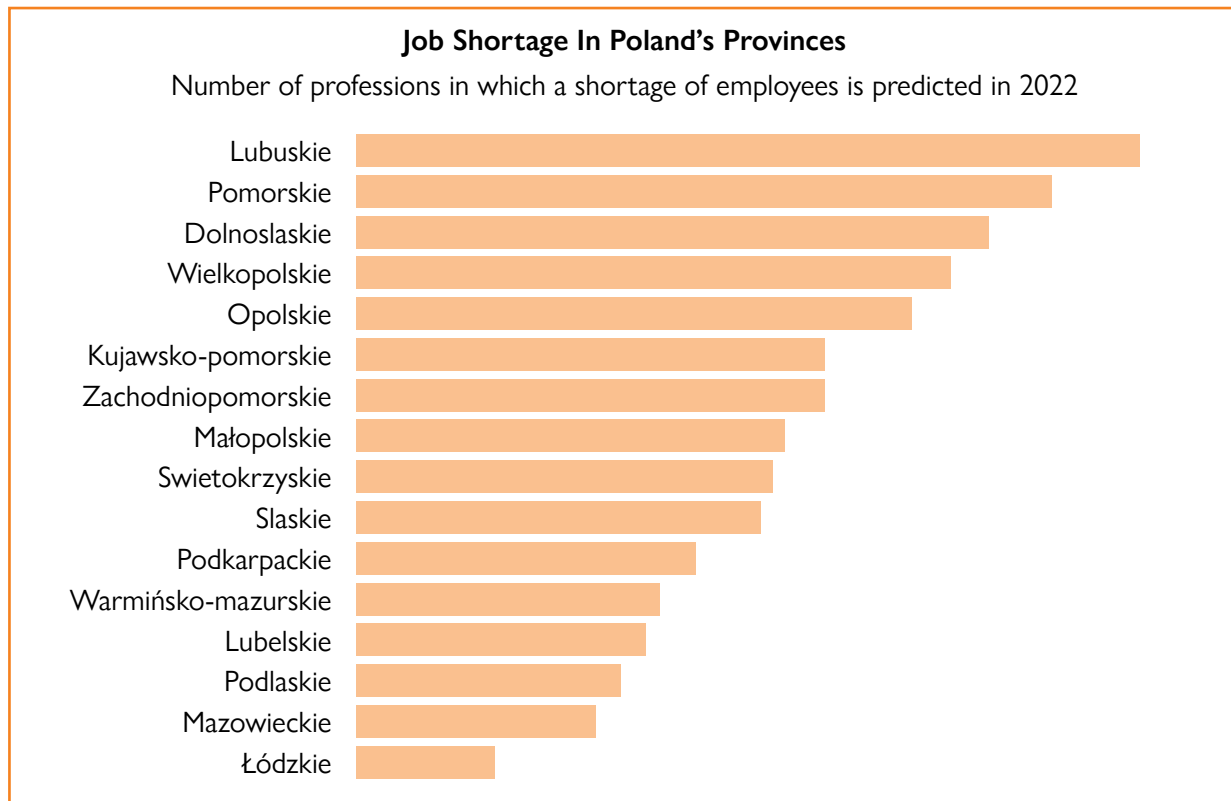
8 Occupational Barometer 2021 for Poland (2020), Ministry of Family, Labour, and Social Policy, Government of Poland, Retrieved from: <https://wupkrakow.praca.gov.pl/documents/67976/13865790/Occupational%20barometer%202020.%20Summary%20Survey%20Raport%20for%20Po-land./9053337d-5fa9-4875-aebf-6333c18dbc4d?t=1614062919000>.

9 The full list as per the Occupational Barometer 2021: accounting and bookkeeping clerks, ambulance workers, bakers, bricklayers and plasterers, bus drivers, concrete placers, concrete finishers and related workers, construction installation assemblers, construction joiners and carpenters, construction workers, cooks, earthmoving plant operators and mechanics, electrical mechanics and electrical assemblers, finishing work technologists in building trades, handicraft workers in wood and joiners, independent accountants, medical doctors, metal working machine tool setters and operators, motor vehicle mechanics and repairers, nurses and midwives, pavers, physiotherapy technicians and assistants, psychologists and psychotherapists, roofers and sheet metal workers in building trades, social work professionals caring for the elderly and disabled, stock clerks, teachers for practical vocational training, teachers of vocational subjects, toolmakers, truck drivers, and welders.



Source: Occupational Barometer

Figure 2: Mapping Skill Shortage Across Provinces, Occupational Barometer 2021



Source: Occupational Barometer

1.1.1 Construction

Construction is a key sector in Poland, valued at 224.3 billion PLN¹⁰ and constituting 9 per cent of the country's GDP. Accumulated growth in the Polish construction sector (19%) is a key driver of the sector across Europe (6%),¹¹ according to the European Construction Industry Federation. Its three major sub-sectors – residential, commercial, and civil engineering works – have seen varying impacts due to the COVID-19 pandemic. While the residential and civil engineering verticals remain stable due to high demand and government investment, commercial construction has taken a hit during the pandemic. It is expected to represent more credit risk and lead to more insolvencies in the coming months. However, the whole sector is also expected to rebound by more than 7 per cent in 2022.¹²

Labour force estimates for the sector vary – while private sector estimates indicate that the construction sector employed 426,100 workers in 2020, just 0.9 per cent more than in 2019,¹³ figures from the European Construction Industry Federation show a labour force of 1.2 million in 2019 (900,000 employees and 300,000 self-employed).¹⁴ Skills shortage is a key challenge the sector has been experiencing. Reports from the European Construction Sector Observatory of the EU since 2015 flag the shortage of skilled workers (particularly bricklayers and plasterers). It also highlights the role that migration plays – in particular, the emigration of Poland's young construction professionals to countries of Northern and Western Europe, leaving a labour market deficit countered through immigration (most notably from Ukraine). However, a recent news report indicates that Polish firms and entrepreneurs are contending with a shortage of Ukrainians in the sector, as many workers have returned to Ukraine to help their families and fight. A Polish Association of Construction Industry Employers (PZPB) statement indicated that 80% of the sector's 480,000 foreign workers were Ukrainian.¹⁵ Private sector estimates highlight that high demand, low availability of skilled workers, and rising labour costs are critical challenges to the sector's growth. The Occupational Barometer highlights 9 key shortage occupations in the sector, including acute ones (in permanent deficit since 2015), such as concrete placers, finishers and related workers, roofers, and sheet metal workers.¹⁶

1.1.2 Manufacturing

Manufacturing is one of Poland's strongest sectors, contributing nearly 17 per cent value added to the GDP in 2019, according to the World Bank,¹⁷ and growing in valuation from 864130.3 million PLN in 2010 to 1450720 million PLN in 2019, according to the Central Statistical Office of Poland.¹⁸ It is also dominated

10 Deloitte (November 2020), Polish Construction Companies 2020: Major Players, Key Growth Drivers & Development Prospects, Retrieved from: https://www2.deloitte.com/content/dam/Deloitte/pl/Documents/Reports/pl_Raport_spolki_budowlane_2020-EN.pdf.

11 European Construction Industry Federation (2021), Overall Construction Activity: Poland, Retrieved from: <https://fieci-statistical-report.eu/poland>.

12 Atradius (October 2020), Industry Trends Construction: Focus on Sector Business Performance and Credit Risk.

13 Deloitte (November 2020), Polish Construction Companies 2020: Major Players, Key Growth Drivers & Development Prospects, Retrieved from: https://www2.deloitte.com/content/dam/Deloitte/pl/Documents/Reports/pl_Raport_spolki_budowlane_2020-EN.pdf.

14 European Construction Industry Federation (2021), Overall Construction Activity: Poland, Retrieved from: <https://fieci-statistical-report.eu/poland>.

15 (25 March, 2022). Polish businesses face labour shortage after Ukraine war. Retrieved from: <https://www.rfi.fr/en/polish-businesses-face-labour-shortage-after-ukraine-war>.

16 Atradius (October 2021), Industry Trends Construction: Focus on Sector Business Performance and Credit Risk; Deloitte (November 2020), Polish Construction Companies 2020: Major Players, Key Growth Drivers & Development Prospects, Retrieved from: https://www2.deloitte.com/content/dam/Deloitte/pl/Documents/Reports/pl_Raport_spolki_budowlane_2020-EN.pdf; Occupational Barometer 2020 for Poland (2019), Ministry of Family, Labour, and Social Policy, Government of Poland, Retrieved from: <https://wup.krakow.praca.gov.pl/documents/67976/13865790/Occupational%20barometer%202020.%20Summary%20Raport%20for%20Poland/9053337d-5fa9-4875-aebf-6333c18dbc4d?t=1614062919000>.

17 World Bank Indicators, Retrieved from: <https://data.worldbank.org/indicator/NV.IND.MANF.ZS?locations=PL>.

18 Statistical Yearbook of Industry 2021, Central Statistical Office, Poland (GUS), Retrieved from: <https://stat.gov.pl/en/topics/statistical-yearbooks/statistical-yearbooks/statistical-yearbook-of-industry-poland-2021,5,15.html>.

by the private sector, which accounted for 83.2 per cent of output in 2019.¹⁹ Unlike countries of Western Europe, where reliance on manufacturing has reduced in recent decades, Poland and other Eastern European countries have emerged as manufacturing hubs. Poland is the world's 16th largest manufacturer, constituting 1 per cent of the world's manufacturing output, with 370000 entities employing 2.3 million (19.3% of the labour force).²⁰ The sector attracts significant foreign direct investment and is driven by strong sub-sectors, including aviation, automotive, food and beverages, domestic appliances, electrical equipment, and metal products. Sub-sectors such as advanced manufacturing, which utilise advanced technology, are still small but have increasing scope in the context of Industry 4.0 (a term for the 'Fourth Industrial Revolution' coined in 2016 to describe how emerging technology would revolutionise industry).²¹

Poland's Occupational Barometer points to 6 important shortage occupations in the sector – electrical mechanics and electrical assemblers, metal workers, machine tool setters and operators, handicraft workers, toolmakers, welders tailors and clothing manufacturers (the last three being in constant deficit since 2016). Similar to the construction industry, the lack of a skilled workforce with the appropriate certifications is a significant challenge. Additionally, difficult working conditions, relatively unattractive prospects such as lower wages, informal work, and limited interest from the local working population exacerbate shortages. In recent years, migrants from other Eastern European countries have been increasingly hired in the sector.²²

1.1.3 Healthcare

Across Europe, especially in the context of the COVID-19 pandemic, the healthcare sector is increasingly under the pressure of shortages. It is because of the dual effect of supply and demand constraints. A shrinking working population is accompanied by the rapid ageing of the existing population, aggravated by the increasing healthcare demands during the pandemic. Despite having lower life expectancies compared to the EU average, Poland's population is ageing faster than other EU countries and studies suggest that the health sector is significantly underfinanced.²³ In 2007, the Polish government introduced a new nursing category (medical caregiver) to offset the nursing shortage (caregivers support nurses, and their duties are less technical).²⁴ However, the shortage of healthcare workers continues to be one of the most critical challenges currently faced by the country's healthcare system, with a ratio of both doctors and nurses being among the lowest in the EU (The 2018 WHO profile shows that there were 5.2 nurses and 2.3 physicians per 1000 of the population). Additional challenges include the lack of general practitioners and nurses for primary care as opposed to specialist doctors whose availability is higher and the ageing health worker population.²⁵

19 Ibid.

20 Euraxess (2016), The Manufacturing Sector in Europe. Labour Market Briefings Series, Retrieved from: https://cdn4.euraxess.org/sites/default/files/labor_market_information_-_manufacturing_sector.pdf.

21 McKinsey (2015), Poland 2025: Europe's New Growth Engine. Retrieved from: https://www.mckinsey.com/~media/mckinsey/business%20functions/economic%20studies%20temp/our%20insights/how%20poland%20can%20become%20a%20european%20growth%20engine/poland%202025_full_report.ashx; International Trade Administration, US Department of Commerce (2021), Poland Country Commercial Guide: Advanced Manufacturing, Retrieved from: <https://www.trade.gov/country-commercial-guides/poland-advanced-manufacturing>.

22 Occupational Barometer 2020 for Poland (2019), Ministry of Family, Labour, and Social Policy, Government of Poland, Retrieved from: <https://wupkrakow.praca.gov.pl/documents/67976/13865790/Occupational%20barometer%202020.%20Summary%20Survey%20Raport%20for%20Poland./9053337d-5fa9-4875-aebf-6333c18dbc4d?t=1614062919000>.

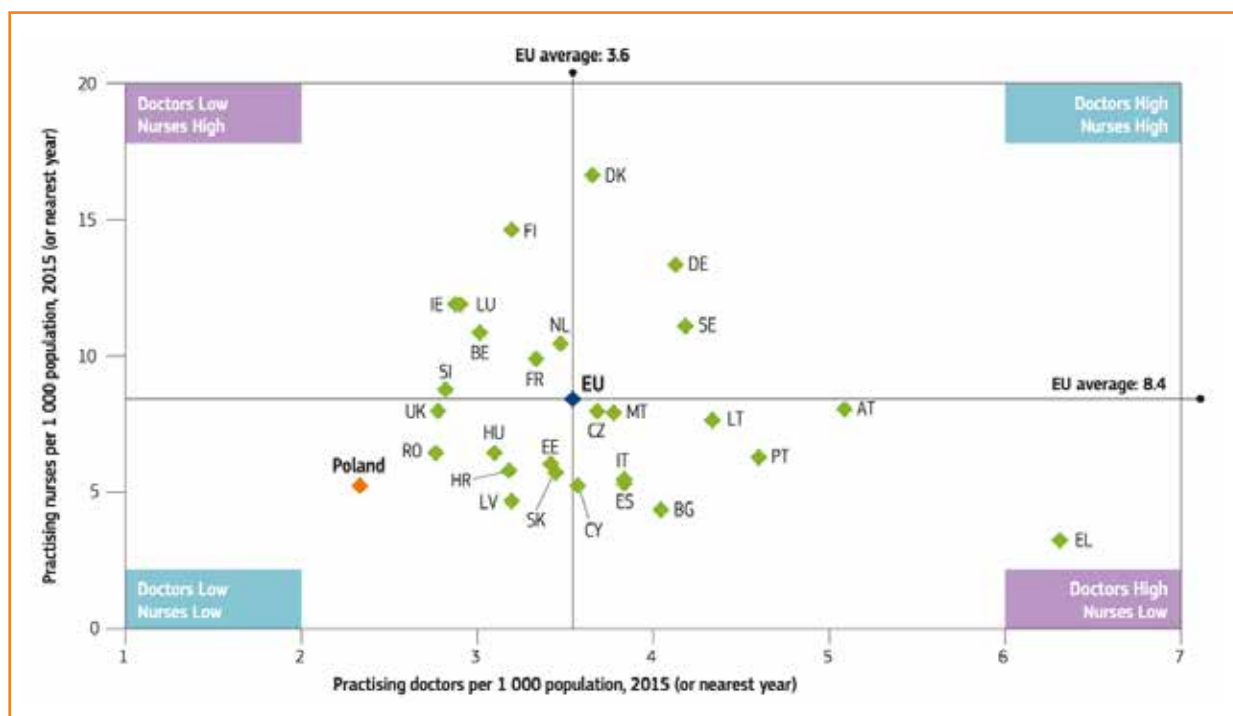
23 Sowada, C. and Kowalska-Bobko, I. (2021), "Sustainability of the Polish Health Care System", Baltagi, B.H. and Moscone, F. (Ed.) The Sustainability of Health Care Systems in Europe (Contributions to Economic Analysis, Vol. 295), Emerald Publishing Limited, Bingley, pp. 117-137. <https://doi.org/10.1108/S0573-855520210000295012>.

24 WHO Europe (2018), Strengthening Nursing in Primary Care in Poland, Retrieved from: https://www.euro.who.int/__data/assets/pdf_file/0008/405719/POL-web-240619.pdf.

25 Żuk, P., Żuk, P., & Lisiewicz-Jakubaszko, J. (2019), Labour migration of doctors and nurses and the impact on the quality of health care in Eastern European countries: The case of Poland. *The Economic and Labour Relations Review*, 30(2), 307–320. <https://doi.org/10.1177/1035304619847335>.

Another issue that exacerbates this shortage is the extensive emigration of medical professionals. Polish doctors and nurses migrate to other European and OECD countries for several reasons, including higher wages, better working conditions, and job roles.²⁶ It creates a labour deficit in the country that impacts the healthcare system. The OECD data shows that the annual inflow of foreign-trained doctors into Poland grew from 60 in 2010 to 390 in 2020, while the inflow of foreign-trained nurses grew from 6 in 2010 to 53 in 2020. Given the actual and projected shortages, these inflows, mainly from Ukraine and Belarus, are low. According to the Occupational Barometer, shortage occupations for 2021 included physiotherapy technicians and assistants, medical doctors, social work professionals caring for the elderly and disabled, ambulance workers, and nurses and midwives. In 2021, challenges in nurse recruitment were expected in 334 out of 380 counties in Poland and in 273 for the recruitment of doctors.²⁷

Figure 3: Healthcare Workforce Across EU Countries



Source: WHO, 2018

1.1.4 Transport & Logistics

Poland’s strategic location at the geographical heart of Europe renders it uniquely suited for the transport and logistics sector. Private sector market research estimates show that the sector is expected to grow per cent annually from 2020-25 and contribute 6 per cent of GDP in 2017. Among its sub-sectors, rail is expected to see the most growth (22.8%), followed by road (10.4%), air (9.7%), river (9.2%), and sea (7.7%) transport.²⁸ It is driven mainly by growth in the e-commerce industry, which is currently valued at 50 billion PLD and projected to grow rapidly in the coming years. PricewaterhouseCoopers (PwC) reports

26 Ibid

27 Occupational Barometer 2020 for Poland (2019), Ministry of Family, Labour, and Social Policy, Government of Poland, Retrieved from: <https://wupkrakow.praca.gov.pl/documents/67976/13865790/Occupational%20barometer%202020.%20Summary%20Survey%20Raport%20for%20Po-land./9053337d-5fa9-4875-aebf-6333c18dbc4d?t=1614062919000>.

28 Mordor Intelligence (2020), Poland Freight and Logistics Market: Growth, Trends, COVID 19 Impacts and Forecasts 2021-26, Retrieved from <https://www.mordorintelligence.com/industry-reports/poland-freight-and-logistics-market>

in 2020 estimate a 22.8 per cent increase in volume (tonnage) handled by Polish carriers between 2018-22. However, PwC also estimates a 200,000-worker and driver shortages during this period. Along with digitalization and industrialization, the labour shortage is slated to be one of the key factors that will shape Poland's transport and logistics sector in the coming decade.²⁹ Poland's Occupational Barometer points to 3 primary shortages – stock clerks, bus drivers, and truck drivers, of which the latter two are acute deficits since 2015. The primary reason is the lack of appropriate skills such as foreign languages on international routes, mechanical knowledge, and soft skills like alertness and time management. In 2021, truck drivers constituted the most significant skill shortage, observed in 351 out of 380 counties in Poland.

1.2 Labour Force Characteristics

The Polish economy has grown significantly in the last two decades and has been reflected in its labour force. Unemployment has drastically dropped from 20.2 per cent in 2002 to 5.7 per cent as of October 2021. However, the overall size of the labour force has not changed much, going from 17.27 million in 2004 to 18.2 million in 2020, with female labour force participation remaining steady between 48-50 per cent for the last two decades. Three features of recent employment growth in Poland are striking. The educational attainment of the workforce (much more with tertiary education), increased employment of older workers (45 and above) due to labour shortages and increasing incidence of labour market segmentation due to temporary employment (for instance, fixed contracts, through temporary work agencies, and civil law contracts).

Research by the Institute of Labour Economics highlights two phases in the rise of this labour market segmentation. Firstly, between 2002 and 2008, driven by an influx of previously unemployed people, temporary employment went up by 1.7 million. Secondly, between 2008 and 2016, the number of temporary workers went up by only 250,000, but workers were stuck in their temporary contracts, with opportunities for a transfer to a permanent job declining.³⁰ In the last two decades, two central attempts at reform have reshaped the labour market. In 2009, the country's early retirement system was discarded and replaced with a more restrictive bridging pension system, wherein workers could choose to retire as much as five years before the statutory retirement age. Subsequent legislation to increase the retirement age itself has since been repealed.³¹

1.2.1 Role of Migrants in the Labour Force

Traditionally, Poland has been considered a country of emigration, especially in the wake of its integration into the EU, when more than a million migrated to Western and Southern European countries such as Germany, Netherlands, the UK, Spain, and Ireland.³² However, in recent years, data from the Polish government notes a steady decline in the flow of "emigration for permanent residence" (from 49,900 in 2006 to 10,900 in 2019), especially post-2015. However, the overall stock of emigrants has steadily increased over the years. In 2002, the total number of emigrant Poles was 786,100, which increased to 2,017,500 in 2011 and 2,415,000 in 2019. Most of these are young (between 25-40) and emigrate for work.³³ However, in recent years, net migration rates have turned positive in Poland, with increasing rates of immigration (although some of this is driven by returning Poles as well).

A 2018 report on attitudes towards refugees and immigrants in Poland highlights that post-2014, when labour shortages became pronounced, the business community lobbied for opening labour markets. As a result, a three-pronged strategy was developed – temporary mobility without permits for nationals of 6

29 PwC (2020), Transport of the Future: Prospects for the Development of Road Transport in Poland in 2020-2030, Retrieved from <https://www.pwc.pl/en/publikacje/2019/transport-of-the-future-prospects-for-the-development-of-road-transport-in-poland-2020-2030.html>.

30 Lewandowski, P. & Magda, I. (2018), The labour market in Poland, 2000–2016. IZA World of Labour, Retrieved from: <https://wol.iza.org/articles/the-labor-market-in-poland/long>.

31 Ibid.

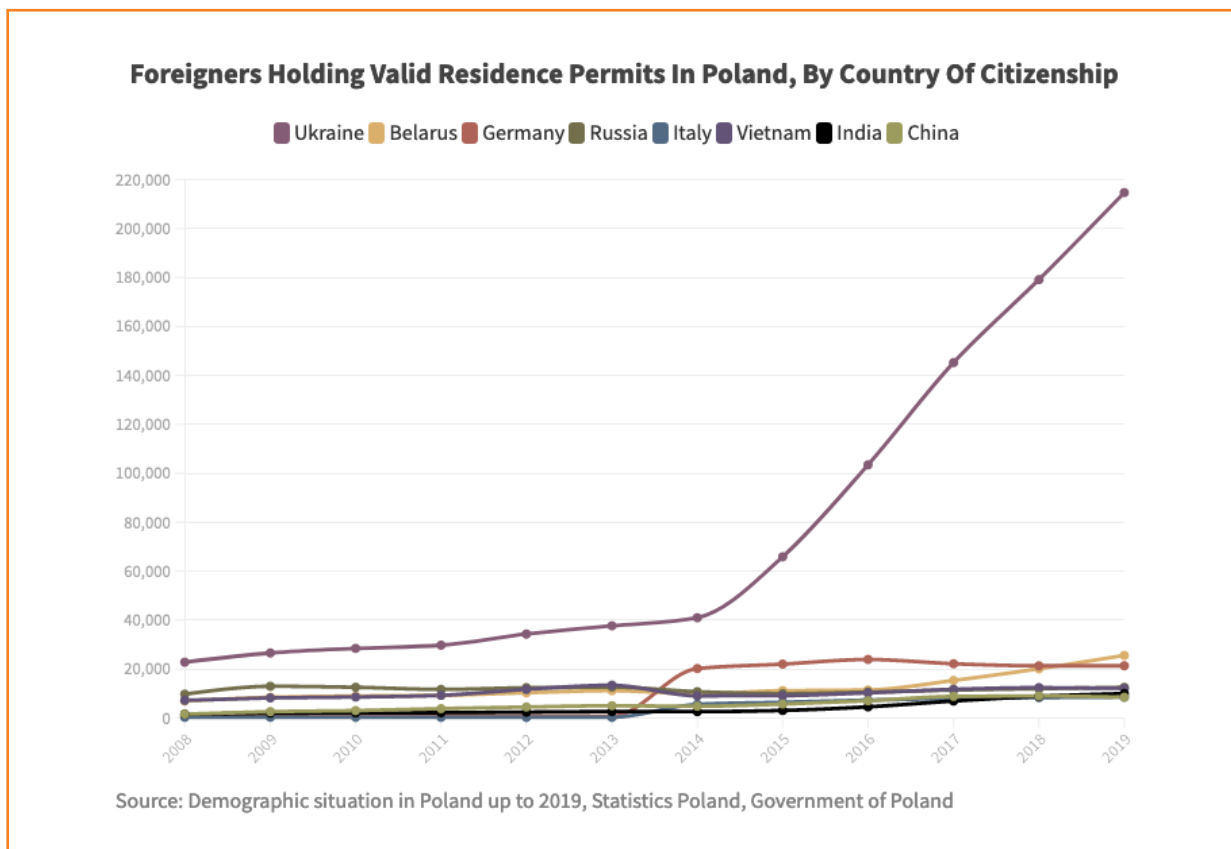
32 Ibid.

33 Statistics Poland (2020), Demographic situation in Poland up to 2019 International migration of population in 2000–2019.

neighbouring countries to address seasonal shortages, easing of employment and working regulations for international students in Poland, and the Pole Card (developed for foreigners of Polish origin, allowing them to work and study in Poland more easily).³⁴ Immigration from non-European countries has also taken place, with countries such as Vietnam, China, and India being important.

In 2019, five nationalities dominated among the population of Third Country Nationals (TCN) issued a residence permit – these were Ukraine (214,700), Belarus (25,600), Russia (12,500), Vietnam (12,100), and India (10,000). Among the total immigrant population, the top 10 countries were Ukraine (2,106,101), Belarus (105,404), Germany (77,073), Moldova (37,338), Russia (37,030), India (33,107), Georgia (27,917), Vietnam (27,386), Turkey (25,049), and China (23,838).³⁵ Work permits issued to TCNs skyrocketed from 18,000 in 2008 to 445,000 in 2019, with the biggest jump taking place post-2014-15 in professions such as senior management and advisory, craft and related trade workers, and plant and machine operators and assemblers. Other professions of relevance were technicians and associate professionals, services and sales workers, and clerical support workers. A majority of Poland’s foreign population is concentrated in the Masovian Voivodeship, Lesser Poland, Greater Poland and Lower Silesia, and a majority is male (ranging from 61-77% of the foreign population in the concerned province).³⁶

Figure 4: Top Source Countries of Immigrants.

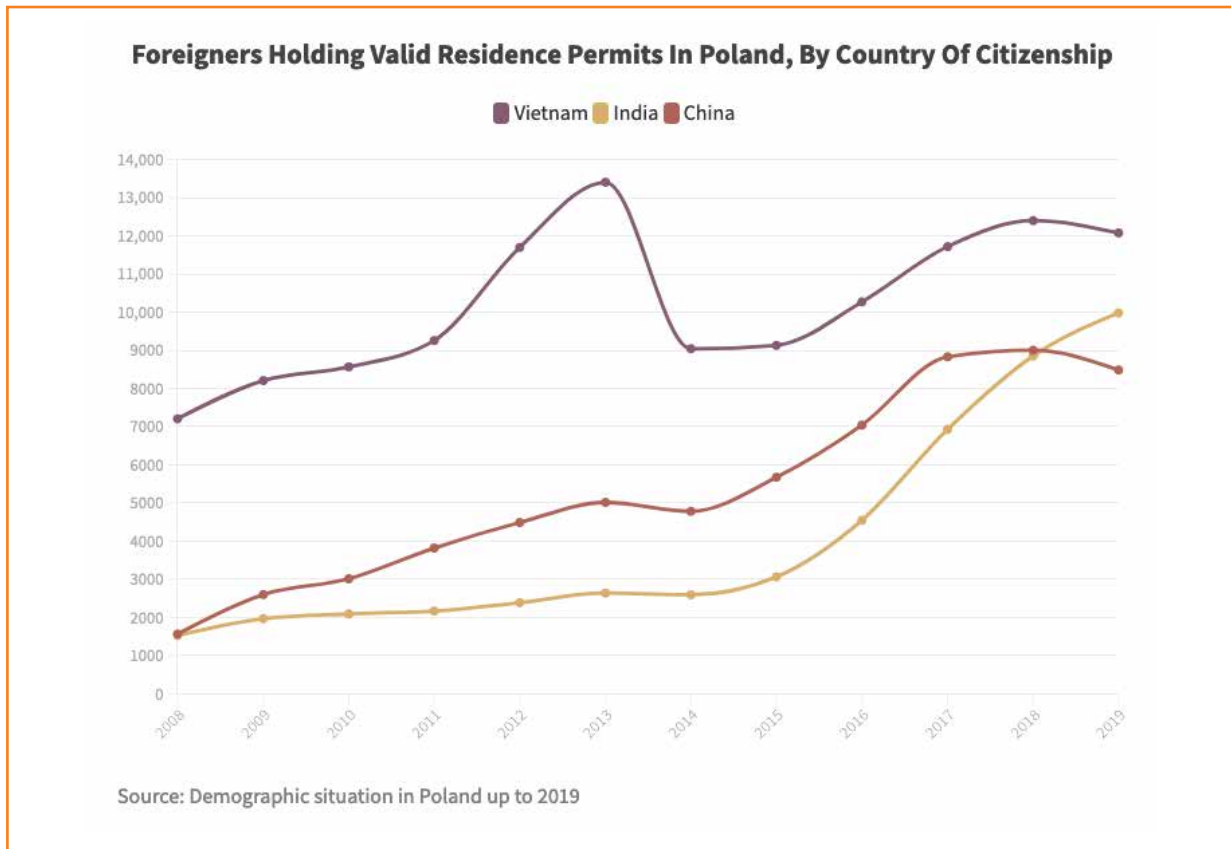


34 Łaciak, B; Segeš Frelank, J (2018), The Wages of Fear: Attitudes Towards Refugees and Migrants in Poland, Institute of Public Affairs, Retrieved from: https://ec.europa.eu/migrant-integration/node/17011_de.

35 Matusz, P & Aivaliotu, E (2020). Circular and temporary migration in Poland during COVID 19. Retrieved from https://admigov.eu/upload/Deliverable_D32_Matusz_Temporary_and_Circular_Migration_Poland.pdf.

36 Statistics Poland (2020), Demographic situation in Poland up to 2019 International migration of population in 2000–2019.

Figure 5: Mapping Asian Source Countries



As a neighbouring country, Ukrainian migrants are a significant part of the migrant workforce in Poland. Ukraine and Belarus are the top source countries for migrants in Poland. The contribution of Ukrainian labour migrants to the Polish economy has been significant, particularly in recent years.

- Prior to 2014, Ukrainian migration to Poland was largely temporary, confined to the agricultural sector and from the western part of the country to popular regions such as Warsaw and Mazowieckie.
- Post-2014, when the political crisis in Ukraine accelerated, migration for employment went up, and Ukrainians from all over the country began migrating to Polish cities such as Krakow, Gdansk, Wroclaw, and Lodz, working in multiple sectors, including construction, hospitality, and domestic work (women). Despite a lack of robust data on exact immigration numbers, studies estimate (by drawing on a range of official sources) that between 2013-18, Ukrainian labour contributed to 13 per cent of GDP growth.³⁷ During this time, the Ukrainian immigrant population was predominantly young, between the age of 30-50, and were drawn to Poland by higher wages (in sectors like construction and hospitality),³⁸ stable political and economic environment, and proximity to home.
- In the wake of the February 2022 conflict, migration from Ukraine has increased tremendously (2.3 million refugees in Poland as of 28 March 2022), comprising largely women, children, and the elderly and will continue to increase. Poland has welcomed the refugees, facilitating entry without visa and waiving work permit requirements.

37 Strzelecki, P et al (2020), The contribution of immigration from Ukraine to economic growth in Poland, NBP Working Paper No. 322, Retrieved from https://www.nbp.pl/publikacje/materialy_i_studia/322_en.pdf.

38 Kusek, W. A., (2019), Ukrainian migrants in Poland: Socio-economic inclusion or exclusion? *Local Economy*, 34(7), 739–744. <https://doi.org/10.1177/0269094219889877>.

1.3 Indian Immigration to Poland

Statistical estimates of the Indian population in Poland vary, and Indians are a relatively smaller immigrant group, according to Polish statistics. According to government data, India is the most relevant source country outside Poland's immediate geographical neighbours, such as Ukraine, Belarus, Russia, and Germany. In 2019, Indians received the 5th highest number of residence permits (10,000), and the total permits issued to Indians stood at 6th highest (33,107) among immigrant groups. 2021 data from India's Ministry of External Affairs points to a total Indian population of 10,960 in Poland (10,162 Non-Resident Indians and 798 People of Indian Origin).³⁹ Eurostat data also provides estimates on migration from India to Poland. In 2019, Poland issued the second-highest number of Blue Cards to Indians (397), and the number of Indian students in the country went up by 136 per cent between 2016-19, according to Eurostat data. Total permits issued to Indians for remunerated activities rose from 1840 in 2012 to 6532 in 2019, while the first permits issued rose from 247 in 2012 to 2809 in 2019.⁴⁰

Only some data on remittances between Poland and India are available. However, based on a statistical model built from World Bank data, Pew Research Centre estimated a remittance flow of 4 million USD from Poland to India in 2017. According to this data, remittances from Poland largely flow to other European countries as well as China, Vietnam, and Nigeria.⁴¹

Unlike traditional destinations such as the USA, UK, and Western Europe, relatively few studies have examined Indian immigrants in Eastern Europe. A 2014 report on the Indian diaspora in Poland by the Polish Institute for International Affairs⁴² highlights that prior to Poland's EU membership, the first wave of Indian migration occurred in the 1990s and comprised largely textile traders and small traders from the Sindhi and Gujarati communities. In the 2000s, as Polish borders tightened during its EU accession, many Indians moved into different businesses, such as hospitality and restaurants. In contrast, others migrated to West Europe/the USA. Qualitative research conducted in 2015 highlights three main types of Indians in Poland. Firstly, the prospective long term immigrants, some of them entrepreneurs. Secondly, employees of Polish companies who live with their families and finally, students and internationally mobile skilled workers, those on intercompany transfer visas whose stay in Poland is a temporary one.⁴³ Standard migration motivations included education, employment, social and economic mobility, career development, marriage, the influence of a 'culture of migration' and seeking new experiences.⁴⁴ The paper, based on interviews with 40 Indians in Poland, highlights entrepreneurship, wholesale business, and hospitality (setting up of restaurants) as well as temporary job roles associated with multinationals/Indian corporations in Poland. The 2014 report also highlights wholesale and retail trade, IT and communication, and hospitality as the sectors of importance for Indians. Indians dominate the ICT sector and financial and insurance activities and are the second largest nationality working in professional, scientific and technical activities after Ukraine.⁴⁵ Research also highlights integration issues faced by Indians, such as language, experiences of discrimination (particularly in public spaces), homesickness and loneliness. However, a qualitative study conducted in Wroclaw found that Indians also viewed migration as a key part of personal development, while women migrants found it a liberating experience.⁴⁶ To varying degrees, the studies also highlight that many Indians initially viewed Poland as a steppingstone in their migration journey, even those who have not yet migrated elsewhere.

39 MEA, 2021. Retrieved from http://mea.gov.in/images/attach/NRIs-and-PIOs_1.pdf.

40 Data from Eurostat

41 Remittance Flows Worldwide in 2017 (2019), Pew Research Centre, Retrieved from: <https://www.pewresearch.org/global/interactives/remittance-flows-by-country/>.

42 (2014), The Indian Diaspora and Poland-India Relations. Polish Institute for International Affairs. Retrieved from <https://www.files.ethz.ch/isn/185705/The%20Indian%20Diaspora%20and%20Poland-India%20Relations.pdf>.

43 Gmaj, K (2019), The Integration of Indians in Poland, Retrieved from: https://www.researchgate.net/publication/332876463_THE_INTEGRATION_OF_INDIAN_MIGRANTS_IN_POLAND.

44 Jaskułowski, K. (2017), Indian middling migrants in Wroclaw: A study of migration experiences and strategies. *Asian and Pacific Migration Journal*, 26(2), 262–273. <https://doi.org/10.1177/0117196817705777>; Gmaj, K (2019), The Integration of Indians in Poland, Retrieved from: https://www.researchgate.net/publication/332876463_THE_INTEGRATION_OF_INDIAN_MIGRANTS_IN_POLAND.

45 (2014), The Indian Diaspora and Poland-India Relations. Polish Institute for International Affairs, Retrieved from <https://www.files.ethz.ch/isn/185705/The%20Indian%20Diaspora%20and%20Poland-India%20Relations.pdf>.

46 Jaskułowski, K., (2017), Indian middling migrants in Wroclaw: A study of migration experiences and strategies. *Asian and Pacific Migration Journal*, 26(2), 262–273, <https://doi.org/10.1177/0117196817705777>.

2 | Mobility Pathways

2.1 Immigration and Visa Policy

Being a member of the EU, Poland distinguishes between the citizens and permanent residents of the EU, who have the right to live and work in Poland, and Third Country Nationals (TCNs), with research finding that immigrants from the EU tend to face far fewer integration barriers than TCNs.⁴⁷ In general, there are four laws governing immigration, integration, and mobility of foreigners – the Promotion of Employment and Labour Market Institutions Act, 2014,⁴⁸ the Polish Act on Foreigners, 2013,⁴⁹ the Asylum Law of 2003,⁵⁰ and the Citizenship Law, 2009.⁵¹ The Act on Foreigners is the one majorly concerned with rules of entry, exit, and visa policies and applies to all foreigners (particularly those without Polish citizenship).

Poland is accessible through the Schengen visa that applies to the Schengen region (though not for work) but also offers national visas for longer periods of stay. National visas, usually associated with employment, business, education, or family reunion/marriage, can be turned into either temporary or permanent residence permits, with PR requiring 5 years of continuous residence in the country. Work permits offered under this law are also categorised. They must be applied for by the employer – A (Polish companies/entities registered in Poland), B (Board Member duties), C (sent to Poland for temporary work at branch office/plant), D (sent to Poland for temporary ad-hoc work duties), and E (sent by a foreign employer for 3 months for purposes not covered under A-D).⁵² However, several additional categories exist, especially those who have been given visas for scientific research, Blue Card holders and their family members, and those who have studied in Polish institutions (secondary school and university).⁵³ Although a labour market test is usually necessary for the issuance of a work permit (certifying that the employer in question is unable

47 Renaud (2011), cited in https://depot.ceon.pl/bitstream/handle/123456789/16537/Integration_of_migrants_in_Poland.pdf?sequence=1&isAllowed=y.

48 2004, Employment Promotion and Labour Market Institutions Act, Government of Poland, Retrieved from: https://www.paih.gov.pl/files/?id_plik=7318.

49 ISAP, Retrieved from: <https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU20130001650>.

50 2003, Act on on granting protection to aliens within the territory of the Republic of Poland, Government of Poland, Retrieved from: <https://www.asylumlawdatabase.eu/sites/default/files/aldfiles/en%20-%20granting%20protection%20to%20aliens%20within%20the%20territory%20of%20the%20Republic%20of%20Poland%20.pdf>.

51 Poland Citizenship Act 2009, Government of Poland, Retrieved from: https://www.legislationline.org/download/id/6570/file/Poland_citizenship_act_2009_en.pdf.

52 Act of 2013 on Foreigners, Government of Poland, Retrieved from: <https://www.refworld.org/docid/54c0b9384.html>; Work Permits in Poland. MIGRANTInfo.pl, (IOM & Ministry of Interior, EU), Retrieved from: https://www.migrant.info.pl/Documents_entitling_a_foreignier_to_work_in_Poland.html.

53 Working in Europe, Euraxess Poland, Retrieved from: <https://www.euraxess.pl/poland/information-assistance/work-permit>.

to find a Polish or EU citizen for that role), it is exempted for certain professions such as construction, truck/bus drivers, elderly caregivers and healthcare workers, according to a Regulation of the Family, Labour and Social Policy Directorate in June 2018.⁵⁴

Poland also has a specific law allowing citizens from Moldova, Belarus, Georgia, Russia, Armenia, and Ukraine to work for 24 months⁵⁵ without additional documentation (Declaration on Entrusting Work to a Foreigner/Oświadczenie o powierzeniu wykonywania pracy cudzoziemcowi).⁵⁶ In these cases, the employer must file a 'declaration on entrusting work to a foreigner' with the local voivodeship labour office. Additionally, a 2015 Minister of Labour and Social Policy regulation exempted certain categories of people from needing a permit (nurses, elderly care assistants, road construction workers, electrical engineers, and heavy truck drivers being some of these).⁵⁷ A January 2022 amendment⁵⁸ to the Act on Foreigners has also waived certain documents for those applying for temporary residence and work permits – they no longer need documentation for place of residence and stable income (the only condition to be met is a minimum income of ~665 euros).

2.2 Bilateral Agreements with India

Besides the multilateral EU-India Common Agenda on Migration and Mobility under which Poland falls, several bilateral agreements have been signed between India and Poland over the years spanning multiple economic sectors, travel, defence, and international cooperation. Despite newspaper reports⁵⁹ of a meeting between the Polish Labour Minister and India's then Minister of Overseas Indian Affairs in 2007 and the proposed signing of an MoU on labour mobility as well as a Joint Working Group for regulation, at present, India does not have any bilateral operational agreements on migration and mobility with Poland, as per a February 2020 update document on India-Poland relations from the Ministry of External Affairs⁶⁰.

Year	Bilateral Agreements
1956	Agreement on Telecommunications Exchange
1957	Agreement on Cultural Cooperation
1960	Agreement on Shipping Cooperation
1970	Agreement on Economic Cooperation
1962	The Second Economic Cooperation Agreement
1965	Third Economic Cooperation

54 Regulation of the Family, Labour, and Social Policy Directorate (2018), Retrieved from: <https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDUJ20180001264/O/D20181264.pdf>, cited in Pawlak, M and Koss-Goryszewska, M (2018) Integration of Migrants in Poland: Contradictions and Imaginations.

55 This is likely to increase to 36 months with new proposed legislation, according to the expert interview conducted with the Ministry of Family and Social Policy.

56 Mazovian Voivodeship Office in Warsaw, Government of Poland, Retrieved from: <https://www.gov.pl/web/uw-mazowiecki/nowe-przepisy-dotyczace-o-powierzeniu-wykonywania-pracy-cudzoziemcowi>.

57 Regulation of the Minister for Labour and Social Policy (April, 2015), Retrieved from: <https://isap.sejm.gov.pl/isap.nsf/download.xsp/WDUJ20150000588/O/D20150588.pdf> : (cited in Pawlak, M and Koss-Goryszewska, M (2018) Integration of Migrants in Poland: Contradictions and Imaginations).

58 Poland: Amended law facilitates the employment of foreigners, European Website on Integration, Retrieved from: https://ec.europa.eu/migrant-integration/news/poland-amended-law-facilitates-employment-foreigners_en.

59 Indian workers now Poland bound (June,2017), Hindustan Times, Retrieved from: <https://www.hindustantimes.com/india/indian-workers-now-poland-bound/story-lfpLTmDolKmyp2D9iF23eO.html>.

60 India Poland Relations (February 2020), Ministry of External Affairs, Government of India, Retrieved from: https://www.mea.gov.in/Portal/ForeignRelation/India_Poland_Feb_2020.pdf.

Year	Bilateral Agreements
1977	Agreement on Air Transport
1977	Agreement on Economic, Industrial, and Technical Cooperation
1989	Agreement on the Avoidance of Double Taxation and Prevention of Tax Evasion with respect to Taxes on Income.
1993	Agreement on Cooperation in Science and Technology.
1996	Protocol on Foreign Office Consultations
1996	Agreement on Promotion and Protection of Investments
2003	Agreement on Cooperation in Combating Organized Crime and International Terrorism.
2003	MOU on Defence Cooperation
2003	Extradition Treaty
2006	Agreement on Economic Cooperation
2009	Agreement on Cooperation in the Field of Healthcare and Medical Science
2009	Agreement on Cooperation in the Field of Tourism
2012	Agreement on Audio-Visual Coproduction
2013	Protocol on Amending the Agreement on Avoidance of Double Taxation and Prevention of Fiscal Evasion with Respect to Taxes and Income.
2015	Agreement on Exemption from Visa Requirement for Holders of Diplomatic Passports
2017	Agreement on cooperation in Agriculture and Allied Sectors
2019	Cooperation in Areas of Coal Mining

3 | Welfare and Integration Policies

3.1 National-level Initiatives

Due to the relatively shorter time that Poland has been a host country, institutions and policies for integrating immigrants have slowly evolved. Before 2015, the integration strategy was essentially non-existent, even described as an “abandonment strategy” in the literature.⁶¹ Official integration policies existed only for repatriates and those applying for asylum under the 2003 Asylum Law – those under international protection receive integration benefits laid out in the 2004 Act on Social Assistance. The introduction of the Individual Integration Program (IPI) in 2000 for those given refugee status was one of the first instruments of state policy and has become a foundation for how integration policy is conceptualised in Poland.⁶² The integration currently falls under the Department of Social Assistance and Integration, Ministry of Family and Social Policy, which coordinates an Inter-ministerial Working Group on the Integration of Foreigners.⁶³ In July 2012, the first strategy document on integration, called ‘Polish Migration Strategy – Current State and Proposed Actions’, was drafted. According to the document, the integration policy was to be instituted by the national government, implemented by local governments, and set up with the support of EU funds, focusing on the economic integration of labour immigrants. However, it was never taken up in the wake of the 2015 refugee crisis.⁶⁴

Post-2015: As a result of the refugee crisis of 2015, which significantly increased asylum applications across the EU and the Ukraine crisis, public opinion in Poland became wary of migration. In 2019, the Ministry of Interior and Administration prepared a Polish Migration Policy, which is yet to be adopted. Some salient features of it include:

- Successful passing of an **integration** course in order to apply for permanent residence, ‘*integration*’ being defined as the “*individual’s greatest possible independence in Polish society, lowering the costs related to a foreigner’s stay in Poland and which is a necessary condition for possible assimilation*” and including practical knowledge such as Polish language and living in accordance with the morals and values of Polish religion (Catholicism) and society.

61 D. Szelewa, Model integracji społecznej imigrantów z krajów trzecich: dostęp do usług społecznych i przegląd polityki społecznej, Raporty i Analizy, Warsaw 2010, p. 29,

62 Rajca, L., (2021), The Evolution of the Approach to the Integration of Immigrants in Poland. Studies in European Affairs. 25(3), 10.33067/SE.3.2021.5.

63 Governance of Migrant Integration in Poland, DG For Migration & Home Affairs, European Union, Retrieved from: https://ec.europa.eu/migrant-integration/country-governance/governance/poland_en.

64 Rajca, L. (2021), The Evolution of the Approach to the Integration of Immigrants in Poland. Studies in European Affairs. 25(3), 10.33067/SE.3.2021.5.

- Successful passing of an **assimilation** course to apply for citizenship – ‘assimilation’ is defined as “*understanding and recognizing the values binding in Poland and rejecting values that pose a threat to social cohesion and security in Poland.*”

Although it is not law yet, the policy has received criticism from several quarters. Statements from civil society organizations such as the Helsinki Foundation for Human Rights and the Committee for Migration Research (Polish Academy of Sciences) highlight that the policy is based on an assumption of migration as a security risk which does not reflect the realities of different kinds of immigration into Poland and does not account for multiculturalism.⁶⁵

Integration policy is relevant in almost every aspect of the immigrant’s life, including the labour market, education, political participation, access to healthcare, and anti-discrimination. Poland’s score in the Migrant Integration Policy Index, which measures the extent of immigrant integration policy in various countries worldwide, highlights the evolution of its integration challenges over time. Currently, Poland holds a score of 40/100 on MIPEX, representing a reduction since 2014, with below average scores in labour market mobility, health, education, and political participation. Poland’s score places it in the group of countries with an integrated approach deemed “equality on paper” – countries which partially provide basic rights and security but no equal opportunities and policies that encourage an unfavourable view of immigrants.⁶⁶ Despite the lack of a national-level integration policy, those with a migration background are partially accounted for in certain legislations such as the Act on Education Law, the Act on Healthcare Services Financed by Public Funds, and the Act on Social Assistance.⁶⁷ Legally resident children with a migration background are guaranteed access to education at both primary and secondary levels. Additional measures to help children integrate, such as Polish language classes, preparatory courses, and assistant teachers trained in the migrant language, are recent measures put in place.⁶⁸

3.2 Local-level Initiatives

The need for national-level integration strategies and local and city-level integration initiatives has been seen across major cities in Poland. In 2017, 12 cities, including Warsaw, Gdansk, Wroclaw, and Krakow, signed a declaration on cooperation for immigrant integration. A second declaration was signed, creating a “Friendly and Safe” Pomeranian Province.⁶⁹

- The city of **Warsaw**, which has the highest immigrant population, set up the Multicultural Centre – an initiative supported by the city administration and run by an NGO consortium with EU funding. The centre offers legal advice on residence permits, education, employment, business, and integration initiatives such as Polish language courses, information and counselling, mini grants for social cohesion and multicultural initiatives. It serves as a social meeting point for immigrant communities in the city.⁷⁰ In November 2012, the city also set up the Social Dialogue Committee for Foreigners, comprising 18 NGOs working with foreigners and foreigner associations.⁷¹ In November 2012, the city also set up the Social Dialogue Committee for Foreigners, comprising 18 NGOs working with foreigners and foreign associations.

65 Committee for Migration Research (2019), Retrieved from: http://www.kbnm.pan.pl/images/Stanowisko_KBnM_Polska_polityka_migracyj-na_03072019.pdf; Helsinki Foundation for Human Rights (2019), Retrieved from: <https://www.hfhr.pl/politykamigracyjnapolski/>.

66 MIPEX 2020, Migration Policy Group, Retrieved from: <https://www.mipex.eu/key-findings>.

67 Kosz-Goryszewska, M., & Pawlak, M. (2018), Integration of migrants in Poland: Contradictions and imaginations in Kucharczyk, J & Mesežnikov, G (ed) Phantom Menace. The Politics and Policies of Migration in Central Europe. Institute for Public Affairs & Heinrich-Böll-Stiftung. Retrieved from: <https://cz.boell.org/en/2019/02/14/phantom-menace>.

68 Ibid.

69 (2012), Poland: The biggest cities speak with one voice on immigrant integration, European Website on Integration, Retrieved from: https://ec.europa.eu/migrant-integration/news/poland-biggest-cities-speak-one-voice-immigrant-integration_en

70 The Warsaw Multicultural Centre, Retrieved from: https://centrumwielokulturowe.waw.pl/en_gb/en/

71 (2012), Poland: The Social Dialogue Committee for Foreigners has just been established in Warsaw, Retrieved from: https://ec.europa.eu/migrant-integration/news/poland-social-dialogue-committee-foreigners-has-just-been-established-warsaw_en

- **Gdansk** is another city with a well-known immigrant integration model,⁷² having won the 2018 Innovation in Politics award for it. In 2015, the city administration set up Poland's first cross-sectoral and interdisciplinary task force on immigrant integration, which evolved into a 150-member body from 70 public institutions and NGOs working on identifying immigrant needs and vulnerabilities. The task force worked through 8 thematic groups (Education, Culture, Housing, Social Assistance, Employment, Violence, Local Community, and Health) and identified challenges in each of these areas. Some of these included:
 - There is a lack of information, counselling, and language support for international students in the city.
 - Unfamiliarity with Polish customs and alienation from Polish peers for international students.
 - Language barriers and need for understanding of the healthcare system.
 - Vulnerabilities when negotiating with landlords as a foreigner.
 - Lack of cultural exchange and mutual understanding at the community level.
 - Poor working conditions, racism, discrimination.

Based on the working group's findings, the Gdansk city administration has committed to a set of goals for immigrant integration to be achieved by 2023. Specific initiatives planned include setting up an Immigrant Service Counter at City Hall, Immigrant Information and Support Centre for all immigrants in the city to seek advice on residency, career guidance, language support, housing assistance, Gdansk City Starter Pack as an information resource for new immigrants, Polish language courses with financial support, interpretation/translation services to new immigrants, Municipal Anti-Discrimination Teams, an Immigrant Council to communicate immigrant issues to the city administration, a Council for Interreligious Dialogue, and a Migration and Multiculturalism Research Centre at the University of Gdansk.

- Wroclaw is another city in Poland with city-level integration measures for immigrants. The Wielokulturowy Wrocław project by the Wrocław Centre for Social Development is a city initiative to promote multiculturalism and support immigrants from different communities as part of the Strategy for Intercultural Dialogue in Wrocław 2018-22. This Dialogue aims to achieve a set of goals across five thematic areas, including education, integration of immigrants, promoting security and knowledge of law, and cooperation and intercultural communication.⁷³ Existing initiatives also include the *Wromigrant* programme⁷⁴ which is a free information and counselling resource available to immigrants in the city in Ukrainian, Russian, German, and English.

72 Immigrant Integration Model (2016), Gdansk City Hall, Retrieved from: <https://download.cloudgdansk.pl/gdansk-pl/d/20170691579/immigrant-integration-model.pdf>

73 Strategy for Intercultural Dialogue in Wrocław 2018-22, Municipality of Wrocław, Retrieved from: https://www.wielokultury.wroclaw.pl/wp-content/uploads/the_strategy_for_the_intercultural_dialogue_in_wroclaw.pdf

74 WroMigrant. Information and activity points for migrants, Retrieved from: <https://www.wielokultury.wroclaw.pl/en/wromigrant-en/>

4 | Methodology

The methodology of this report relies on an initial secondary review of data, studies, reports and policy documents about the labour market in Poland. The following criteria will be used to assess the labour market of the selected countries and the potential of the migration corridor:

1. **Demand Side Analysis in Selected Countries:** Economic profile, demographic features, labour force characteristics, skill shortages, and surpluses in the destination country at the national and sub-national level. This section will also focus on key characteristics of the selected country's economy and labour force, including GDP per capita, foreign direct investment, net migration rates, and in/outflow of remittances.
2. **Existing Indian Population at Destination:** The size and characteristics of the existing Indian population in the destination countries – including the number of students, workers, family dependents, the number of residence and Blue Cards issued, permits for educational, family, and remunerated activities, and overall trends in the immigration of Indians over the years.
3. **Supply Side Analysis of Required Skills:** Mapping projected demand side shortages with India's skill profile and capacities across the sector's interest to understand the serviceable labour shortages in the selected country.
4. **Policy Landscape:** The bilateral and unilateral policy ecosystem that governs migration between India and the selected countries – this includes EC directives, national and sub-national level legislation in the countries, including entry-exit laws, employment, social security, and integration policies, sectoral policies, work permit policies for student migrants, bilateral agreements (labour mobility partnerships and social security agreements) with India as well as India's current emigration framework, and policies at the state level in India. This section will also focus on welfare systems in destination countries and the availability of upskilling initiatives like language training and on-site training for migrants in the selected countries.
5. **Integration Potential:** Programmes and policies to promote economic, social, and cultural integration of labour immigrants in general and those from India.

This report also utilises stakeholder consultations in Key Informant Interviews to explore key labour migration issues from various perspectives, fill gaps in knowledge, and generate a qualitative understanding of Poland's migration corridor with India. The questionnaires for various stakeholders have been drafted based on the preliminary findings of the literature review, including the skill shortages, labour market conditions, and institutional frameworks on immigration and migrant integration. The stakeholder consultations also included interviews with members of the Indian diaspora. The next section of the report details the findings from the stakeholder consultations conducted with Polish and Indian stakeholders.

5 | Key Informant Interview Findings

5.1 Labour Market Opportunities in Poland

In this section, the study focuses on respondents' views on labour market opportunities in Poland, including the country's economic growth, the cross-sectoral nature of shortages, recruitment strategies, and the role of immigration policy. The section also looks at different source countries, the growing profile of Asian immigrants, and, in particular, Indian immigrants. It should be noted that, in this section, government implies the Government of Poland.

5.1.1 Growing Economy, Cross-Sectoral Shortages

Growing Economy, Labour Shortages a Growing Constraint: Respondents across stakeholder categories highlighted the growing nature of the Polish economy and the concomitant growth in job vacancies and shortages across sectors. A representative from a key research organization⁷⁵ highlighted that Poland is ageing much faster than expected, and inflows to the labour market are not at the required level. The country's estimated 2-2.5 million immigrants are largely labour migrants and experience low unemployment rates, according to him. Multiple stakeholders, including those from research organizations and the government, echoed the literature around Polish migration, that the country, till very recently, had been one of emigration and was still in the process of adapting to immigration being a growing reality. Government representatives⁷⁶ pointed out that unemployment rates are also at a historic low in Poland, further indicating the growing need for immigration to fulfil labour market shortages and that shortages apply to low and high skill positions. Immigration has also been on the rise, especially in the past 4 years and during the COVID-19 pandemic, prompted by labour market shortages, unfavourable demographic conditions, and high emigration. A representative from a multilateral organization⁷⁷ also highlighted that over 50 per cent of employers in Poland declare labour shortage, which is now impeding growth and business development. A respondent from a research organization⁷⁸ drew an interesting economic parallel to Germany in the post-World War Two era, pointing out that much like Germany in the 1950s, Poland today requires a large, inexpensive labour force to support the country's economic growth. The short term policy view, focused on today's shortages, does not consider the upward social mobility and career aspirations many immigrants may have, leading to future integration challenges.

75 Interview Code IOM/2

76 Interview Code IOM/1

77 Interview Code IOM/7

78 Interview Code IOM/6

Key Sectors of Interest: Several sectors and industries came up in the interviews as ones facing labour shortages. Agriculture was highlighted as one of the early sectors associated with shortages and, consequently, an immigrant labour force. According to a respondent from a research institution, it has now shifted to sectors such as construction, hospitality, hotel services, care, and cleaning services. Agriculture, care, and construction are now labelled migrant-worker sectors, a fundamental structural change that has taken place in recent years. Employers in these sectors face challenges in recruiting the necessary labour force.⁷⁹ According to an expert, the growing food delivery sector (UberEats, Bolt) is also essential, particularly for students, many of whom work part-time in such positions. A representative from a multilateral organization⁸⁰ highlighted the business sector (growing dynamically, especially in cities), transport and logistics (particularly during the pandemic), and construction. In business, high skill positions typically do not require Polish. However, the latter two mostly hire low skill workers and need language skills. Sectors such as administrative services, warehouse management, transport and logistics were highlighted by government representatives as not severely impacted by the COVID-19 pandemic. Sectors such as construction, agriculture, transport, and processing industries are relevant for low skill positions and those such as IT and health for high skill positions, according to multiple government representatives.⁸¹ However, government representatives also highlighted that Poland is keen to balance the needs of the labour market with immigration to ensure that social cohesion in the country is not impacted.⁸² Data provided by government representatives indicate that between 2018-2021, foreign workers were mainly hired in industrial processing, construction, administration services and supporting activities, transport and warehouse management. Although high skill professionals currently account for a relatively small percentage of immigrant workers (between 1-3% across the various types of permits), a record number of permits for such work (~15,000) was issued in 2021, primarily for sectors such as IT, economic specialists, and management positions. However, it was also pointed out that many are officially employed with staffing/recruitment firms and hired out to clients for their services. Hence their exact job role may not be known by official statistics. A representative from an employer federation⁸³ stated that while upward mobility and upskilling take place in sectors like IT and production, they are less common in ones like construction.

Crucial Role of Intermediaries and Private Players: The role played by recruitment agencies and the private sector in labour immigration was mentioned by multiple stakeholders, who pointed out that this is a product of the slow-moving immigration bureaucracy coupled with urgent labour shortages. Government respondents⁸⁴ highlighted that certain sectors have labour market tests, such as requiring the employer to obtain a clearance that there were no suitably qualified Poles for a position before hiring a foreign worker. Representatives from research institutions and multilateral organizations pointed out the key intermediary role that recruitment agencies have increasingly played in shaping Poland's migration ecosystem. Such intermediaries are particularly important for managing the burden of complex paperwork. A representative from a multilateral organization⁸⁵ also highlighted that the push for foreign recruitment is primarily from business interests and the private sector (also highlighted in the secondary literature). A representative from an employer federation stated that prior to COVID, employers had been pushing the government on the issue of labour shortages and foreign workers. He added that many employers would be willing to take on expenses to facilitate the travel of foreign workers and are interested in cooperation on this front. However, they are limited by the lack of clarity related to migration policy which, in turn, is influenced by public perception towards immigration.

79 Interview Code IOM/2

80 Interview Code IOM/7

81 Interview Code IOM/9, IOM/10

82 Interview Code IOM/10

83 Interview Code IOM/13

84 Interview Code IOM/9

85 Interview Code IOM/5

5.1.2 Neighbouring Countries Predominant, Emerging Asian Corridors

Ukraine and Other Neighbouring Countries: Respondents were asked about the important countries of origin at present. Nearly every stakeholder spoke about the crucial role of neighbouring countries such as Belarus, Moldova, and, most importantly, Ukraine. As found in the literature, Ukraine is the single most important source of immigration to Poland⁸⁶ and critical to the labour force. Immigration from Ukraine went up significantly in the wake of the conflict in 2014. Although a representative from a research institution⁸⁷ felt that this labour force would reduce in the medium term, due to the dire situation of Ukraine's labour shortages and the appeal of Western European countries like Germany for Ukrainian migrants, the situation has changed significantly due to the conflict of February 2022. Earlier data appeared to point to Ukraine's share in declarations⁸⁸ fell from 91 per cent in 2018 to 83 per cent in 2021, and for work permits, from 73 per cent in 2018 to 64 per cent in 2021, according to data shared by government representatives. However, as of 28 March 2022, Poland is currently hosting 2.3 million Ukrainian refugees, a number likely to increase as the conflict continues.⁸⁹

An Indian representative from the private sector federation in Poland⁹⁰ felt that the current crisis will bring dramatic change to the labour market and immigration and that Poland is unlikely to encourage immigration from elsewhere. Most of the refugees have been women and children rather than men. According to him, it is likely that the refugees will be able to fulfil demand in white collar jobs and industries such as food processing and packaging. The respondent felt that despite the acute labour shortage Poland was experiencing prior to the conflict, with the large numbers of refugees that have come in, the government will face challenges in providing employment and support to them all. Multiple media reports have highlighted Poland's "open-door" policy towards Ukrainian refugees, with the government waiving visas and work permit requirements. The representative from the federation also reported similar views as found in the secondary literature on the cultural and linguistic affinities that benefit Ukrainians in Poland. However, questions still need to be answered about whether the new Ukrainian labour force will be able to service the particular labour shortages that Poland currently has. A respondent working with a refugee-focused welfare centre in Warsaw⁹¹ stated that in the past Ukrainians have been important for sectors such as service and manufacturing and tend to accept lower wages. While Ukrainians may now be able to fill some labour shortages in Poland, it is unclear whether more chronic shortages in sectors like healthcare, logistics, etc. can be addressed by this labour force.

Another expert⁹² felt that relying on workers migrating from the other 6 countries included in the Declaration on Entrusting Work to a Foreigner may not be enough. A representative from a multilateral organization⁹³ highlighted the increasing competition for workers from Eastern Europe and, in particular, the challenges related to qualification recognition that Ukrainians and Belarusians sometimes face. In the healthcare sector, the Polish government has even considered bridging initiatives for Ukrainian nurses who graduate only from high school in Ukraine and face issues with skill recognition. However, multiple respondents pointed out cultural and linguistic similarities. People from Ukraine and Belarus, in particular, do not look visibly different from Polish locals and are often preferred in professions like medicine and

86 Most of the interviews for this brief took place prior to the beginning of the current political crisis in Ukraine. Section 4.1.2 reflects on the impact of this crisis, drawing on secondary literature and the views of respondents interviewed after the conflict began.

77 Interview Code IOM/2

88 Refer to Section 2.1 for a review of the Polish Declaration (an immigration policy for workers from 6 neighbouring countries, including Ukraine).

89 Ukraine Refugee Situation, Operational Data Portal, Retrieved from: <https://data2.unhcr.org/en/situations/ukraine>.

90 Interview Code IOM/14

91 Interview Code IOM//15

92 Interview Code IOM/6

93 Interview Code IOM/5

hospitality, where communication is key. A representative from a multilateral organization felt that while the preference for Ukraine, Russia, and Belarus is rooted in historical relationships, the connection to countries like Georgia and Azerbaijan is more political.⁹⁴

Emerging Source Countries in Asia: Despite the documented reliance on and preference for neighbouring countries, respondents did note an increasing diversification of immigration to Poland. While East and Southeast Asian countries such as China and Vietnam sent immigrants even a few decades ago, their role has now grown more important, as have other emerging Asian countries such as India, Nepal, Bangladesh, and Indonesia. An expert noted a striking rise in Asian workers across Poland in recent times. Another highlighted that there has been significant (though unsuccessful) private sector pressure on the government to facilitate immigration from Vietnam; Vietnamese immigrants are perceived to be the largest non-European migrant group in Poland.⁹⁵ A representative of an employer organization⁹⁶ highlighted that agencies are providing temporary labour services in Poland that currently work with Nepal and Russia but not India. A representative from a multilateral organization⁹⁷ pointed out that Asian immigrants often tend to be clustered in certain sectors with harsher working conditions, with a far less secure status than immigrants from neighbouring countries. An employer organization representative⁹⁸ also felt that Asian immigrants might face worse conditions, although their federation clearly states that there should be no differentiation between foreign workers. He pointed out that in cases of people working under informal circumstances without work permits, there is more risk of experiencing exploitation and low wages. Other countries that have featured in policy discussions around labour immigration include the Central Asian nations, according to her. While the Philippines has featured in discussions around healthcare and nursing, lower salaries and better prospects in countries like the Czech Republic tend to draw them away, according to an expert.⁹⁹

Growing Immigration Even During COVID-19 Pandemic: Government representatives¹⁰⁰ pointed out that after a brief drop during the second quarter of 2020, immigration, since then, has been on the rise. Data from other government stakeholders indicate that young people predominate in all types of permit applications (75%). The percentage of women recipients varies depending on the type of permit, such as work permits (25% in 2021), declarations (37% in 2021), and seasonal work permits (64% in 2021). Specific sectors were severely hit during the pandemic, most notably cleaning services (a sector dominated by Ukrainian women), as offices were shut down. However, the food and takeaway sector experienced a boom during the pandemic, benefiting mainly the Asian migrants working there.

5.1.3 Fragmentary Approach to Immigration Policy

Preferential Policy for Neighbouring Countries: As a country of emigration until recently, immigration is an area in which the government has not yet enacted a comprehensive policy. However, stakeholders reported that one was being drafted before the COVID-19 pandemic started. Respondents from different stakeholder categories held divergent views on Polish immigration policy, but all agreed that the country has a decided preference for neighbouring nations. Multiple stakeholders referred to the Declaration Policy – a system where employers are allowed to file a “declaration on entrusting work to a foreigner” with the local voivodeship office to employ nationals of 6 countries (Ukraine, Armenia, Georgia, Moldova, Belarus, Russia). A research expert¹⁰¹ felt that Poland lacks vision concerning migration policy

94 Interview Code IOM/7

95 Interview Code IOM/7

96 Interview Code IOM/13

97 Interview Code IOM/5

98 Interview Code IOM/13

99 Interview Code IOM/5

100 Interview Code IOM/1

101 Interview Code IOM/6

and that there is generally no consensus around what a future of immigration could be. She added that even earlier government attempts to put a policy in place, such as in 2012, have been reversed by later governments. A representative from a multilateral organization, however, felt that Polish immigration policy had followed logically from its labour market shortages by opening up just to neighbouring countries first (through the Declaration Policy). At the same time, another expert¹⁰² pointed out that Poland's policies can be viewed as liberal and flexible, but only for the six neighbouring countries and in the short-term perspective. She also highlighted that the government once had a keen interest in return-migration and attracting some skilled Polish diasporas back home. Government representatives¹⁰³ said that the Declaration Policy had been an attempt to attract more long-term migration but that no new countries are currently being considered outside the existing six.

Complex Bureaucracies Around Immigration: Multiple stakeholders spoke about the complexities of the legal ecosystem around immigration and work permits. Despite simplifications in migration procedure since 2007 and rising numbers of declarations and seasonal work permits, bureaucratic hurdles continue to plague countries that do not fall under the Declaration Policy. Expert respondents also pointed out that the Blue Card does not carry much potential in Poland since it is not an easier process than existing national-level immigration policies. Similarly, the immigration of entrepreneurs follows complicated channels that many may not wish to take up. A research expert¹⁰⁴ pointed out that the immigrants qualifying for the Blue Card may typically prefer other Western European countries over Poland. However, another¹⁰⁵ highlighted the continued relevance of the Blue Card in high skill pockets such as Krakow, which is home to a large student community and a thriving corporate space. Government representatives highlighted that there are plans to increase the work permit duration to 36 months in the future and that Poland currently processes nearly half a million each year.¹⁰⁶ The government is keen on immigration through the declarations channel rather than work permits, they added. Another issue faced is that one has to reapply for a work permit in cases where the job role changes. Government representatives¹⁰⁷ also highlighted that even when the work permit is obtained (usually in an average of 50-52 days), immigrant workers face issues related to the residence permit, which is an independent procedure that increases waiting time. Understanding the legal regulations is often challenging for foreign workers, although, during the COVID-19 pandemic, these regulations were relaxed, with all existing permits extended until the pandemic is declared over. Research experts also pointed out bottlenecks associated with visa issuance, a problem that affects India in particular and is further elaborated in Section 5.2.

5.2 India as a Country of Origin of Labour Immigrants

In this section, we focus on respondents' views about India as a key source country for labour immigration to Poland. It highlights the emerging nature of Indian immigration, current trends, and the sectors of relevance for Indian workers.

5.2.1 Indians as a Notable and Growing Minority

Nature of Labour Immigration from India: Multiple respondents from different stakeholder categories reflected on the growing importance of India as a source country. A general trend towards immigration from Asian countries has moved the needle in favour of nations such as India, Nepal, Indonesia, Vietnam, Bangladesh, and Indians are increasing a visible minority¹⁰⁸ in a relatively homogenous host society.

102 Interview Code IOM/5

103 Interview Code IOM/1

104 Interview Code IOM/2

105 Interview Code IOM/4

106 Interview Code IOM/1

107 Interview Code IOM/9

108 Interview Code IOM/3

Multiple respondents from different stakeholder categories reflected on the growing importance of India as a source country. A general trend towards immigration from Asian countries has moved the needle in favour of nations such as India, Nepal, Indonesia, Vietnam, and Bangladesh, and Indians are increasing a visible minority in a relatively homogenous host society. Data shared by government representatives from the Ministry of Labour in Poland highlight that Indians comprised 3 per cent of work permits issued in 2021, up from 1.8 per cent in 2018, with the most permits issued for mandate contracts (temporary with no pension benefits). The actual numbers also show a steep increase from 8052 in 2019, nearly doubling to 15305 in 2021, in job profiles such as workers, artisans, welders, cooks, and database administrators. Other sectors of importance for Indian immigrants highlighted by multilateral organizations include manufacturing, administrative and support services, machine operators and fitters, and IT. Indians also tend to be recruited by international companies with recruiting agencies across the world, according to a multilateral organization.¹⁰⁹ Most men (94%) in the age range of 25-34 go to provinces such as Mazowieckie, Wielkopolskie and Małopolskie. Cities like Warsaw and Krakow are also known for Indian immigrants, according to experts. The data shared highlighted that Indians majorly migrate to Poland on work permits and not through the seasonal permit that carries a limitation of 9 months. Indian immigrants also hail from multiple states across the country, speaking many languages and of diverse religious origins, according to a research expert working on the Indian diaspora.¹¹⁰ Research experts highlighted that Indian immigration to Poland has recently increased, particularly after Poland's inclusion in the EU. Two key reasons were identified by a research expert specializing in this corridor.¹¹¹ Firstly, Poland's economic growth and emigration rates drive up salaries and labour market opportunities along with a relatively lower cost of living compared to other European countries. Secondly, Polish universities are becoming increasingly active in recruiting Indian students. Indians are prominent in the food delivery sector. They are also uniquely positioned to leverage areas like yoga and ayurvedic medicine, which are gaining popularity in Poland, according to another research expert.¹¹²

INDIANS IN THE RESTAURANT SECTOR: CASE STUDY

A research expert who has worked extensively on the Indian diaspora in Poland described the business initiatives many Indians have undertaken, especially in the hospitality sector. Indian restaurants, in particular, have been booming, with multiple cropping up on every street corner over the last 10 years. Initially, many of these restaurants struggled to survive and served popular foods like pizza. However, returning Polish migrants from the UK, having experienced Indian food, have driven an increasing popularity of Indian food and Indian restaurants, presenting entrepreneurship opportunities.

Role of Students: Multiple stakeholders also highlighted the role played by Indian student migration and how this can be an effective channel for future integration into the Polish labour market. Data shared by government stakeholders¹¹³ indicates that in 2020, 4.3 per cent of international students in Polish universities were Indians (~3400). Government representatives¹¹⁴ also highlighted the role played by Indian student migration and how this can be an effective channel for future integration into the Polish labour market. A research expert¹¹⁵ in the corridor pointed out that the study route is prevalent, with many coming on student visas to work part-time and eventually full-time (for Indian students, primarily in food delivery).

109 Interview Code IOM/7

110 Interview Code IOM/4

111 Interview Code IOM/3

112 Interview Code IOM/3

113 Interview Code IOM/9

114 Interview Code IOM/1

115 Interview Code IOM/3

Bureaucratic Bottlenecks and Policy Challenges: Stakeholders spoke about the factors impeding Indian immigration to Poland. Research experts and private sector representatives (employer federations and recruiting agencies) highlighted the limited capacity of the Polish embassies to process visas, particularly for India, where the two Embassies in Delhi and Mumbai are inadequate for the many Indians applying for visas.¹¹⁶ There have been cases of Indian students unable to get visas till months later for university programmes they were accepted into and even cases where work permits were issued, but visas did not come through. It was also highlighted by an Indian stakeholder from the recruiting industry,¹¹⁷ who felt that Polish diplomatic missions should be open to working with the certified recruiting fraternity in India for more efficient processing. Political considerations are also a factor, according to a research expert.¹¹⁸ Post-2015 and the refugee crisis, public opinion is somewhat unfavourable towards migrants, and the Polish government unofficially follows a policy of not increasing consular staff to limit immigration, he added. Within the EU, Poland is known for its hard stance on migration. A government representative¹¹⁹ pointed out that there are no known risks associated with Indian immigrants. However, the country's high migration potential may be considered a risk and further cooperation may accelerate immigration, according to him. An expert with a background in immigration law¹²⁰ and experience with the Indian community highlighted that Indians tend to stumble during paperwork, often relying on paid services of intermediaries to expedite the process. It was particularly true for low-skill workers, who may also need help with English. However, issues concerning work permit reapplications every time a change of job role occurs plague Indians in high skill sectors like IT. One recent case cited by the expert was that of an Indian IT specialist currently working in a managerial position who is looking for a new job. Although new rules have been passed recently to allow him to remain in the country while applying for the new permit, he must do so. By contrast, those who have studied in Poland do not face such bureaucratic hurdles.

A research expert specialising in the Indian diaspora¹²¹ spoke about the potential of bilateral agreements between the Indian and Polish governments. Given the good relationship between the two governments and migration aspirations in India, the corridor may benefit from a bilateral agreement, according to him. He added that although the pandemic has affected mobility, things are picking up again, and efforts must be made to expedite bureaucratic bottlenecks like visa processing. An example he described was the Delhi-Warsaw direct flight connection which used to be fully booked but was suspended during the COVID-19 pandemic. A representative from the employer federation¹²² also added that the private sector in Poland is likely to be open to cooperation with the Indian government, given that they have a keen sense of the labour shortages. A government representative¹²³ added that an important factor for bilateral agreements on migration is the country's cooperation on the returns of "illegal immigrants." He noted that Poland has not had much experience of Indians overstaying visas or otherwise violating such regulations and that there do not appear to be severe obstacles in cooperating with the Indian government on returns. A regional stakeholder in India¹²⁴ pointed out that Indian states like Kerala receive recruitment requests from countries such as Poland but are often unable to follow up on them due to limited institutional support. They also indicated their willingness to work with the Indian government to respond to such recruitment requests in the future.

116 Interview Code IOM/3

117 Interview Code IOM/11

118 Interview Code IOM/3

119 Interview Code IOM/10

120 Interview Code IOM/8

121 Interview Code IOM/3

122 Interview Code IOM/13

123 Interview Code IOM/10

124 Interview Code IOM/12

Poland as a Transit country: Echoing the secondary literature, the representative of a research organization,¹²⁵ an expert on the Indian diaspora, highlighted that Indians are a highly mobile group, with aspirations for further migration, particularly to other Western countries. Another pointed out cases of Indian students in Poland who choose to leave study programmes and migrate to the EU for work.¹²⁶

5.3 Integration of Foreign Workers

This section focuses on the integration experiences, challenges, and prospects of foreign workers in Poland. The section looks at the general lack of national-level integration policy in the country, the role of multiculturalism in integration policy, and the integration potential of the Indian community in particular.

5.3.1 Lack of National Policy Supplemented Through Local Channels

Multiple respondents from across stakeholder categories spoke about Poland's lack of integration policy and the underdeveloped nature of institutions vital for immigrants in their everyday lives. A research expert¹²⁷ pointed out that integration plans are usually available for asylum seekers, but labour immigrants and their families are typically on their own. Government representatives¹²⁸ felt that integration challenges permeate all aspects of life, including employment, work, healthcare, education, social support, and accommodation but highlighted that the institutional infrastructure for integration is still very much in the making. Research experts pointed out that in the absence of national policy, local level initiatives in cities and Non-Governmental Organizations (NGOs) have a critical role, especially in families accessing schools, navigating local bureaucracy, and providing information.¹²⁹ Another research expert asserted the need for Poland to embrace the multiculturalism that comes with diverse immigrant communities. According to him, the country has been accustomed to culturally similar immigrants from Ukraine and Belarus, so it will have to pivot its integration policies to accommodate those from increasingly diverse nations.¹³⁰

Another expert highlighted the changing nature of immigrant families, especially second and third generation immigrants who have been raised Polish but are not integrated.¹³¹ A government representative¹³² pointed out the work of the National Labour Inspectorate, which provides information about occupational safety, workers' rights, and labour law to foreign workers in their languages, including English. Workers also have the right to register complaints and law violations with the institution.

5.3.2 Cultural Affinities and Integration Potential for Indians

Respondents highlighted that with increasing numbers, Indians are now a visible minority immigrant community in Poland. A research expert¹³³ pointed out that Indians tend to be treated well and do not face as much discrimination. Indians also see a great deal of cultural affinity, particularly concerning Polish values regarding family, culture, and traditions, according to him. The role of Indian diaspora organizations is important for integration. In recent years, associations around sport and culture, as well as through social media, have sprung up to support new arrivals. However, analyses of attitudes towards immigration in Poland highlight that Polish society has not been as positively inclined towards immigrants as other traditional destination countries in Europe, such as Germany and France. As mentioned earlier, Poland's score on the MIPEX has reduced since 2014, and only 4 per cent of Poland views immigration as important to the country, compared to 12-13 per cent in Germany and France.¹³⁴ In the section below, we also highlight some of the negative experiences that various members of the Indian diaspora have had in recent times.

125 Interview Code IOM/4

126 Interview Code IOM/3

127 Interview Code IOM/2

128 Interview Code IOM/9

129 Refer to Section 3.2 for a secondary overview of local-level integration initiatives in Poland.

130 Interview Code IOM/4

131 Interview Code IOM/6

132 Interview Code IOM/9

133 Interview Code IOM/3

134 Observatory of Public Attitudes to Migration (OPAM), 2021, Retrieved from <https://migrationpolicycentre.eu/opam/> (based on Euro-barometer data).

5.3.3 Language for Integration

Nearly every stakeholder spoke about the critical role of the Polish language for effective integration in the medium to long term. A research expert¹³⁵ highlighted the particular need for this in the schooling system, where most teachers speak in Polish only. However, in certain cities, courses in English are increasingly cropping up. According to a government representative,¹³⁶ the Polish language is critical for everyday life in the social, professional, and institutional environment. There are national and local level initiatives (including private sector ones) to facilitate language training for immigrants, especially children. A representative from a multilateral organization¹³⁷ pointed out that Indians tend to work in sectors where language is not as relevant. However, even for them, the role of language in everyday life cannot be denied. It is especially the case for those who aspire to get long term residence permits, where a B1 level of Polish is a prerequisite, according to her.

5.4 Voices from the Diaspora

“If Indian students are up for a challenge in terms of language, then they can apply for Poland.” – Diaspora Interview 1

“Without knowledge of Polish, one can survive in Poland, at least in some areas of the country. But, if one plans to stay here long-term, learning the language is imperative.” Diaspora Interview 5

Linguistic and Cultural Differences: Overall, the diaspora members interviewed held mixed views on the linguistic and cultural differences they have dealt with in Poland. Most, however, underlined the importance of learning the language for everyday life, even if one’s education takes place in English. A recent graduate in tourism who now has a job felt that despite the geographical advantages of being in the middle of Europe and the EU, Poland is not the best first destination for someone who has never been abroad. However, her overall experience has been positive and empowering, and she hopes to settle in Poland for the time being. Overall, the diaspora members interviewed held mixed views on the linguistic and cultural differences they have dealt with in Poland. Most, however, underlined the importance of learning the language for everyday life, even if one’s education takes place in English. A recent graduate in tourism who now has a job felt that despite the geographical advantages of being in the middle of Europe and the EU, Poland is not the best first destination for someone who has never been abroad. However, her overall experience has been positive and empowering, and she hopes to settle in Poland for the time being.

Another diaspora member who has lived in Poland for nearly three decades contrasted the relatively fast, quick-paced lives that Indians are used to with the slower, more deliberate European lifestyle. He felt this is an adjustment Indians have to make if they want to work and socialise with Polish locals. Those who have studied in Poland mainly were positive about the support received from their universities in navigating bureaucracies but highlighted that the bigger cities like Warsaw, Gdansk, and Krakow are more migrant friendly. An Indian student in Warsaw also appreciated the extensive part time work opportunities available to students, a point highlighted by the key informant interviews.

“In the last 4 years there is an acute shortage of labour, and we could see a lot of movement in terms of Poles coming back, we could see a lot of Ukrainians and last 4-5 years, we could see a lot of Indians, that was a surprising fact. Huge demand actually of getting labour and blue collar and white collar from Asian countries.” – Diaspora Interview 2

“I don’t think Europe, in general, is a good destination for Indians- there are too many language and cultural barriers, and there is a lot of prejudice and racism. In India, we have a preconceived notion that in these countries, crime is very low and standard of living is high, but in truth, living in Europe is very expensive, and discrimination and racist crimes are common.” – Diaspora Interview 4

135 Interview Code IOM/2

136 Interview Code IOM/9

137 Interview Code IOM/7

Opportunities Exist, but Bureaucratic Challenges and Discrimination Are Challenges:

Interviewees with experience in the business community highlighted that Poland's economic growth presents numerous opportunities for potential immigrants. Sectors like IT, business, pharmaceuticals, and research would benefit greatly from Indian immigration. However, challenges are numerous as well. Multiple interviewees spoke about the paperwork challenges, from the visa stage to residence permits. A graduate who recently started working in Poland highlighted some of the bureaucratic hurdles she faced in getting a visa on time during her studies, applying for the residence permit, and then for the work permit. A current student spoke about the long wait times for residence permits, without which he cannot leave Poland. Sometimes, paying a lawyer's fee is the fastest and easiest way to get past the bureaucracy. Another recent graduate had a negative experience with university support and the Polish bureaucracy. Most interviewees mentioned that Poland is not entirely a migrant friendly country, although the younger generation tends to be friendlier and more open. One interviewee had direct experiences of racism when landlords refused to rent to him during the COVID-19 pandemic, leaving him practically homeless for a brief period. An Indian closely involved with the larger diaspora highlighted a recent initiative of the Indian Community of Poland where data on over 1000 instances of racism was collected from the Indian community and shared with the Ambassador. The organization also works closely with the local government, the Polish Statistical Office, the Border Guard, and the Embassies to support Indians in Poland.

"The most important point here is, I think in last, say, 25 to 30 years close to that, I have not seen a very high level visit of President or Prime Minister happening in Poland. These high level visits, they always help to boost relationship at various levels whether it is business or whether is cultural. And it helps in putting the relations in a right spirit." – **Diaspora Interview 2**

Need for High-Level Engagement from Indian Government: Two interviewees who are long term residents in Poland and closely involved with diaspora welfare highlighted the need for institutional engagement from Indian governmental stakeholders. In April 2017, the Vice President of India, Shri M. Hamid Ansari was warmly received in Poland. There have been other significant diplomatic exchanges. For instance, Krzysztof Szczerski, the Secretary of State and Chief of the Cabinet of the President of Poland, visited India in January 2019. Moreover, in August 2019, Dr. S. Jaishankar, the current External Affairs Minister, undertook an official visit. More such visits will strengthen the bilateral ties between the two nations. An interviewee also highlighted that Poland should consider setting up additional consulates in other Indian cities to counter the bureaucratic bottlenecks. Both respondents emphasized that they and the organizations they are associated with (Indian Community in Poland, Indo-Polish Chamber of Commerce) would be keen to work with the Indian government in the future for the welfare of the Indian community in Poland.

"If there is government level dialogue, there needs to be a system to protect Indians from informal agents who often defraud people. Because the regular channel of immigration is slow, people get desperate and end up paying large amounts of money to irregular agents." – **Diaspora Interview 4**

"A big problem in the migration journey to Poland is the existence of unregistered, informal agents who defraud aspiring migrants by giving them fake job offers or taking large sums of money for visa and other processes. These kinds of issues cannot be solved by the diaspora, although we take an effort by regularly telling people to only follow registered recruiters and agencies, but some kind of institutional mechanism to protect migrants from this issue will be very helpful." – **Diaspora Interview 5**

Irregular Channels, Informal Agencies Active in Indo-Polish Corridor: Two interviewees highlighted the activities of informal, unregulated agencies that put some aspiring Indian migrants in danger. These agencies often defraud aspiring migrants with fake job offers and solicit large sums of money for permits and visas. Those desperate to leave and frustrated with long waiting times often choose this option. Both highlighted the need for government intervention in this issue.

6 | Conclusion

6.1 Key Takeaways

- Poland is facing cross-sectoral labour shortages due to **the combined effect of population ageing and the emigration of Polish nationals to other countries**. Sectors such as agriculture, construction, hospitality, transport, logistics, and care, as well as high skill industries such as IT and healthcare, are facing shortages that immigrants from neighbouring countries have serviced.
- The Polish labour market has opened up partially, particularly for seasonal work from neighbouring countries. **Ukraine and Belarus were the dominant migrant sending countries, but other countries**, including Moldova, Georgia, and Russia, are also important. Among Asian countries of origin, respondents highlighted **China and Vietnam as particularly important** over the last few decades and **emerging nations such as Nepal, India, and Bangladesh**. However, Ukrainian migrants have been and will continue to play a critical role in the labour market and in filling existing labour shortages. The recent conflict in Ukraine has sharply increased the number of Ukrainians in Poland (2.3 million as per March 2022 estimates). **Stakeholders expect this to impact immigration** from other countries since Poland will have a significant potential labour force with strong cultural and linguistic connections with the local population. However, questions still need to be answered about **whether the new Ukrainian labour force will be able to service the particular labour shortages that Poland currently has**. While Ukrainians may now be able to fill some labour shortages in Poland, it is still being determined whether this labour force can address more chronic shortages in sectors like healthcare and logistics.
- India is a **relatively smaller immigrant community** in Poland but has **strong roots in both business** (wholesale, hospitality) and **the education sector**. Secondary literature and the primary interviews highlighted that Indians play an important role in wholesale and retail businesses, restaurants and catering, as well as sectors like IT. Semi-skill and temporary positions in sectors like manufacturing, construction, and administrative services have been associated with Indians recently, and the **number of permits issued has sharply increased over the last three years**. However, given the new influx of Ukrainian refugees, **sectors such as IT (where Indians are typically well recognized and preferred) and business (where Indians have established themselves to a certain extent)** may be the best future avenues. **Student migration** continues to be an important route, with multiple stakeholders highlighting the **increasing numbers of Indians studying in Poland** and **taking on student jobs** in sectors like food delivery. Given the **availability of English education** and the **relaxation of regulations around part time work for students**, this is also a key future avenue for Indian immigration and labour market integration in Poland.

- Several stakeholders identified that the key challenge is Poland's **need for more government policy**. Due to the relatively negative public attitudes towards immigration, **the government has been slow to act on the growing labour shortages** that the private sector and employers have highlighted. Pressure from employer groups has led to some relaxation in recent years, but a **comprehensive migration policy is yet to be officially endorsed**. Since the Ukrainian refugee population is now expected to help counter some of the existing shortages, **such a policy for other immigrant groups at the government level may not be a reality soon**. Although stakeholders were optimistic about the potential for bilateral engagement, it may be most useful to **seek cooperation with private sector federations** and through the recruiting fraternity. The private sector has been critical in pushing for labour market reform. It is also the most closely impacted by labour shortages and has been lobbying for the immigration of foreign workers. They present a **compelling alternative for bilateral cooperation** for source countries such as India.
- Integration challenges are important for Indians, especially since Poland lacks a comprehensive integration policy for immigrant communities. For short term immigrants and those viewing Poland as a transit destination as they seek to migrate elsewhere in Europe, challenges of family reunion and long term integration should be more relevant. Some challenges highlighted by the diaspora and key informants were **culture shock, lack of language skills, and discrimination** faced by the community (although this is less experienced in well-known migrant destination cities like Warsaw, Krakow, Wroclaw, and Gdansk). The importance of **cooperation with the existing diaspora associations** in mitigating these challenges was highlighted by stakeholders.

6.2 Limitations

- Poland is one of the most important first responders to the Ukraine crisis, having taken in over 3 million Ukrainian refugees thus far. A key limitation of this report is that most interviews took place before the beginning of the crisis. Hence there is a limited reflection from the stakeholders on how the evolving geopolitical situation will impact Indian immigration. However, this also made it possible to access interviews with government stakeholders (who are likely too preoccupied with the crisis to give interviews now) and have them reflect on the Indian community in particular.
- This report is also limited in its representation of the views of trade unions, who were unfortunately unresponsive to email and telephonic outreach from the project team. Views from the Indian diaspora are also somewhat limited in number. However, two of our respondents were closely associated with diaspora organizations and were able to provide a more detailed overview of the experiences of the Indian community.

ANNEX

The findings in the report draw from a total of **21 key informant interviews** (7 female, 14 male) – 15 individual experts across nine institutions in Poland, 5 diaspora interviews, and 2 Indian KIs.

Stakeholder	Stakeholder Category
Ministry of Family and Social Policy	Government
1. (3 Experts on Labour Migration, Statistics, and Legislation) (IOM/1)	
2. Office for Foreigners, Government of Poland (IOM/9)	
3. Ministry of Interior and Administration (IOM/10)	Employer Organizations, Trade Unions
4. Confederation Leviathan (IOM/13)	
5. Indo-Polish Chamber of Commerce (IOM/14)	Research Organizations, NGOs, Experts
6. Centre for Migration Research (IOM/2)	
7. Polish Institute of International Affairs (IOM/3)	
8. Krakow University (IOM/4)	
9. Institute of Public Affairs (IOM/6)	
10. Immigration Lawyer (individual expert, focus on India) (IOM/8)	
11. Social Welfare Centre, Wola District, Warsaw (IOM/15)	Multilaterals
12. ICMPD Poland (IOM/5)	
13. IOM Poland (IOM/7)	Indian Diaspora
14. 5 students and working professionals	
15. Indian Personnel Export Promotion Council (IPEPCIL) (IOM/11)	Indian Stakeholders
16. Non-Resident Keralites Association (NORKA), Government of Kerala (IOM/12)	

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