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# **Polish citizens working abroad in 2016**

## **Report of the survey**

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# Synthesis

**This report presents selected results of questionnaire surveys of emigrants from Poland in Great Britain, Germany, Ireland and the Netherlands performed in November and December 2016 for the needs of Narodowy Bank Polski.** These surveys represent a unique source of information concerning the position of emigrants from Poland in foreign labour markets and their links with the country, including remittances to Poland. A special issue is the impact of Great Britain's exit from the European Union (*Brexit*) on emigrants' life plans. In brief, the report responds to the following research questions significant in terms of current migration trends:

- 1) Is temporary emigration turning into settlement emigration and what are the consequences?
- 2) To what extent do differences in wages and the labour market situation between Poland and the countries of Western Europe influence decisions on emigration?
- 3) How are the preferences of emigrants from Poland regarding remittances changing?
- 4) What are the consequences of the Brexit referendum in Great Britain?

**The results of the surveys indicate that differences in wage level are the main reason for new emigration and Polish citizens remaining in EU countries.** Converted into PLN, emigrants in Germany earn the highest salaries (after conversion, PLN 6,907 net on average) whereas emigrants in Great Britain earn the lowest (PLN 6,005). Regardless of the country of emigration, the most important factor which could prompt immigrants to return to Poland is the remuneration; however, the threshold of satisfactory remuneration in Poland declared by people considering returning is approximately PLN 5,000 net, which clearly exceeds the current average wage in the economy and the median wage in the Polish economy. In practice, such a wage level can only be achieved in certain large cities by specialists with marketable qualifications.

**The tendency of more and more frequent settlement migration already observed in earlier years has been confirmed in the recent results.** The continuation of the settlement trend is visible mainly through the increase in the percentage of people living abroad with their family. These growths are most strongly seen in the case of the Netherlands and Germany. Labour migration to these countries started later than the migration to Great Britain and Ireland, therefore, the process of settlement in these countries is still strongly visible. In the case of Great Britain and Ireland, it has already reached a more stable level. The majority of people who are not planning to stay permanently in the given country either want to return to Poland (48% of responses) or have not taken a decision regarding their destination yet (39%). Only a minor

percentage of people (13%) declare that after leaving the given country they will search for a job outside Poland in another foreign country.

**The gradual professional promotion of emigrants from Poland staying abroad for at least several years takes place; however, the sectors in which immigrants from Poland work are still selective.** In Great Britain, industry and hotels and restaurants are the most important sectors. In Ireland, the hotel and restaurant industry are the most frequent workplaces for immigrants from Poland. The majority of emigrants arrive to the Netherlands to work in the agricultural sector and warehouse management. In Germany, like in Great Britain, industry as well as hotels and restaurants are the main sectors employing Poles. In all countries, Poles most frequently find employment as qualified workers (welder, machine operator, qualified bricklayer, hairdresser) as well as workers performing unskilled work which does not require any qualifications (maid, waiter, fruit picking). However, the comparison of data over several years indicates that despite the continued dominant role of professions which do not require high qualifications, there are gradual changes in the structure of emigrants' employment towards professions allowing them to obtain higher earnings.<sup>1</sup>

**In all the analysed countries, about one third of Poles transfer money to Poland; however, the propensity to send remittances is decreasing along with the increase in settlement migration.** Polish emigrants staying in Great Britain and Ireland transfer their earnings to a lesser extent compared to emigrants from the continent (in Ireland remittances were declared by 28.9% of respondents, in Great Britain by 34.2%, in the Netherlands by 36.7% and in Germany by 37.2%). Differences between these two pairs of countries arise mainly from a different propensity to transfer their earnings for people planning a permanent stay abroad. People who are not planning to return to Poland transfer their earnings less frequently, which may be associated with the fact that the centre of their life interests or their closest family are already located abroad. The share of people sending remittances to Poland in this group amounts to 22.6% in Ireland, 24.5% in Great Britain, 30.7% in the Netherlands, and 31.8% in Germany. Among people in the four countries under discussion who plan to return to Poland, approximately 40% have stated that they transfer the money they earn to Poland.

**Typical new emigrants from Poland are young people, and this is not changing over time, which means that the ageing of the population of Poland should limit emigration in the future.** As the data collected indicate, although the process of labour migration from Poland has continued for 12 years, the profile of people currently leaving Poland does not significantly deviate from the general migrant's profile. Women are more willing to search for a job abroad,

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<sup>1</sup>See also "Quarterly labour market report in 2017, Q1 (Box no. 5) [http://www.nbp.pl/publikacje/rynek\\_pracy/rynek\\_pracy\\_2017\\_1kw.pdf#page=37](http://www.nbp.pl/publikacje/rynek_pracy/rynek_pracy_2017_1kw.pdf#page=37)"

and young people aged 25-44 prevail among migrants. The motivation prompting people to leave is similar.

**As early as in 2016, a considerable number of emigrants in Great Britain had resident's status (20%) or the required five years of stay (another 20%). Subsequent regulations may explain the increased inflow of emigrants from Poland to Great Britain over the last 2 years.** The conditions agreed in 2018 of emigrants' continued stay in Great Britain after Brexit guarantee that all emigrants from Poland who arrive in Great Britain before 31 December 2020 may stay there. It means that 92% of emigrants – respondents to the questionnaire in 2016 – may obtain the right of permanent residence even before the threshold date in 2020, whereas another 8% will have to wait a year after the threshold date. The GUS (Statistics Poland) data for 2016 and 2017 indicate that not only was return migration not related to the decision on Brexit, but even more dynamic migration occurred, which may be partly explained by people wanting to fulfil the formal requirements allowing the stabilisation of their stay in Great Britain after Brexit.

**In the subsequent chapters,** the results of studies associated with social and demographic tendencies, the labour market and finance of immigrant households, and remittances to Poland from Polish emigrants are presented in more detail, including a summary of information on the perception of Brexit by Polish emigrants.

# 1. Social and demographic tendencies of emigration from Poland

- The net migration of Polish citizens remains negative and the structure of emigrants' demographic features and reasons for leaving has changed insignificantly over the recent years.
- In their plans immigrants' assume increasingly longer stays or staying permanently in all the analysed countries. In the case of Great Britain and Ireland, the percentage of immigrants who have a family in Poland is decreasing.
- Emigrants continue to declare considerable mobility – approximately half of them plan a further move, but the majority of them have no precise plans. The largest number of declarations of return to Poland was recorded in Ireland.

## 1.1. Demographic characteristics of migrants

**The trend of negative balance in migration of people with Polish citizenship continued in 2014-2016; however, the nature of migration is changing.** A year after the last survey performed in 2014, the number of emigrants temporarily staying abroad increased according to the data of the Statistics Poland from 2,320 thousand at the end of 2014 to 2,515 thousand at the end of 2016<sup>2</sup>, i.e. by 8.4%<sup>3</sup> (Table 1). On the basis of other available information – the number of Poles registered in the German social security system or the number of people insured in Great Britain – it can be concluded that in 2017 the number of Poles staying abroad also continued to grow. The continued departures of Poles suggests that the emigration process observed since 2004 is continuing and has not finished yet, although a significant slowdown over recent years can be observed. In this report, the analysis covers the four countries easiest to migrate to after the accession to the European Union: Great Britain, Germany, the Netherlands and Ireland. In total, 68% of all Polish citizens living outside Poland currently stay in these countries and almost 80% of people who stayed outside Poland in the territory of Europe. It is worth noticing that although in the years of the economic and financial crisis of 2008-2010 the balance of migration of Polish citizens became slightly positive. In subsequent years the number of Polish citizens in the main migration destination countries, excluding Ireland, was

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<sup>2</sup>[http://stat.gov.pl/files/gfx/portalinformacyjny/pl/defaultaktualnosci/5471/2/9/1/informacja\\_o\\_rozmiarach\\_i\\_kierunkach\\_czasowej\\_emigracji\\_z\\_polski\\_w\\_latach\\_2004-2016.pdf](http://stat.gov.pl/files/gfx/portalinformacyjny/pl/defaultaktualnosci/5471/2/9/1/informacja_o_rozmiarach_i_kierunkach_czasowej_emigracji_z_polski_w_latach_2004-2016.pdf)

<sup>3</sup> Data of Polish Statistics refer to the number of people temporarily staying abroad

again increasing and for the time being, the decision of Great Britain to leave the European Union (Brexit) has not been reflected in a decrease in the balance of migration to this country.

**Table 1. Number of Polish citizens staying\* outside the borders of the country**

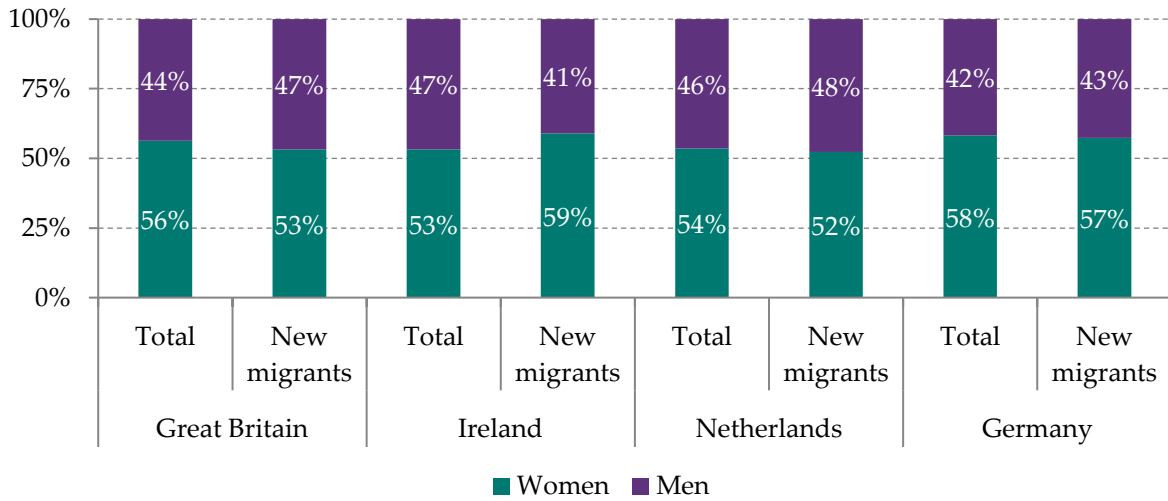
	2002	2004	2007	2010	2014	2015	2016
World	786	1000	2270	2000	2320	2397	2515
Europe	461	770	1925	1685	2013	2098	2214
including:							
Great Britain	24	150	690	580	685	720	788
Germany	289	385	490	440	614	655	687
Ireland	2	15	200	133	113	111	112
Netherlands	10	23	98	92	109	112	116

Source: GUS data, \*before 2006 – stays over 2 months, from 2006 – stays over 3 months

The composition of the sample covered by the survey reveals that emigrants **who left Poland during the last** two years (between survey rounds) constitute a significant proportion of the population of Poles living abroad. **Further in the report, they are referred to as “new migrants”**. In the studied group, people who came to a given country between the last round of the survey, which took place in autumn 2014, and the current survey, i.e. over the period of two years dividing both rounds of the survey, made up 20.8%.

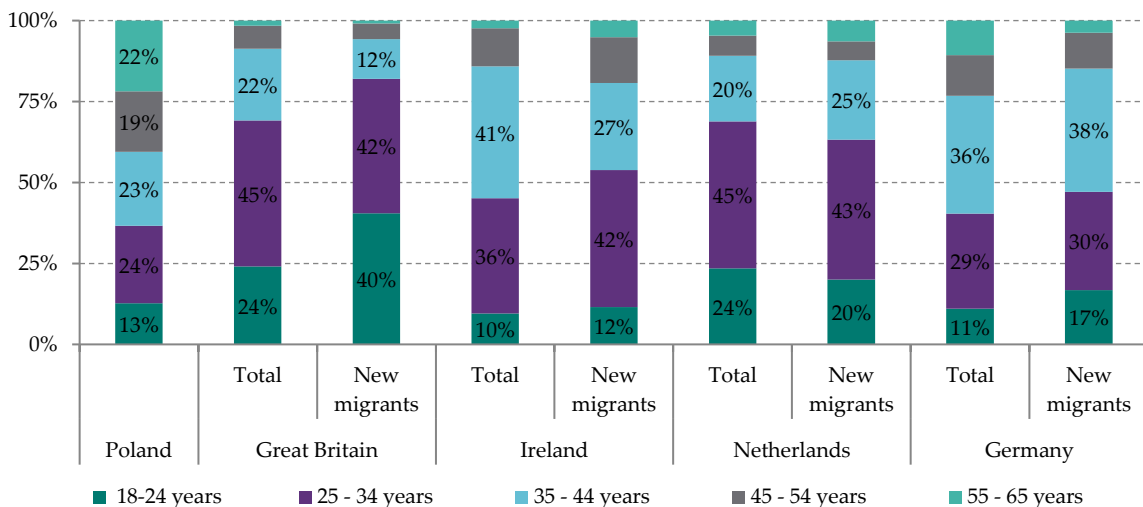
In terms of the underlying demographic features of migrants, women represent a slightly larger percentage, regardless of the duration of their stay abroad (Figure 1). Overall, in the entire sample examined, women made up 55.9%, with the highest percentage recorded in Germany – 58.3% and the lowest in Ireland – 53.2%. Among new migrants, there were also more women than men – 55.3%, which means that women are still more prepared to search for a job abroad than men. At the same time, in the latter group, the share ranged from 52.3% in the Netherlands to 59.0% in Ireland. The higher propensity of women to go abroad has already been confirmed by the population census performed in 2011 by Statistics Poland. According to the results of the census, the share of women among Poles staying temporarily abroad reached 51.1% and that of men 48.9%, respectively.

**Figure 1. Structure of migrants in the NBP survey according to gender**



In the age structure (Figure 2), people aged 25-34 make by far the highest percentage (both in Great Britain and in the Netherlands they constituted 45.0% of respondents) followed by people aged between 35 and 44 (in Ireland they represented 40.7% of respondents, in Germany 36.4%). Jointly, these two age groups represent from 66.0 to 67.0% of the population in Germany, in the Netherlands and in Great Britain, and up to 76.0% in Ireland. People representing the oldest age group constitute the smallest group. Their highest representation is found in Germany, where the share of people over 45 amounted to 23.2, and this figure is almost three times higher than in Great Britain, where they represented only 8.7% of the surveyed population.

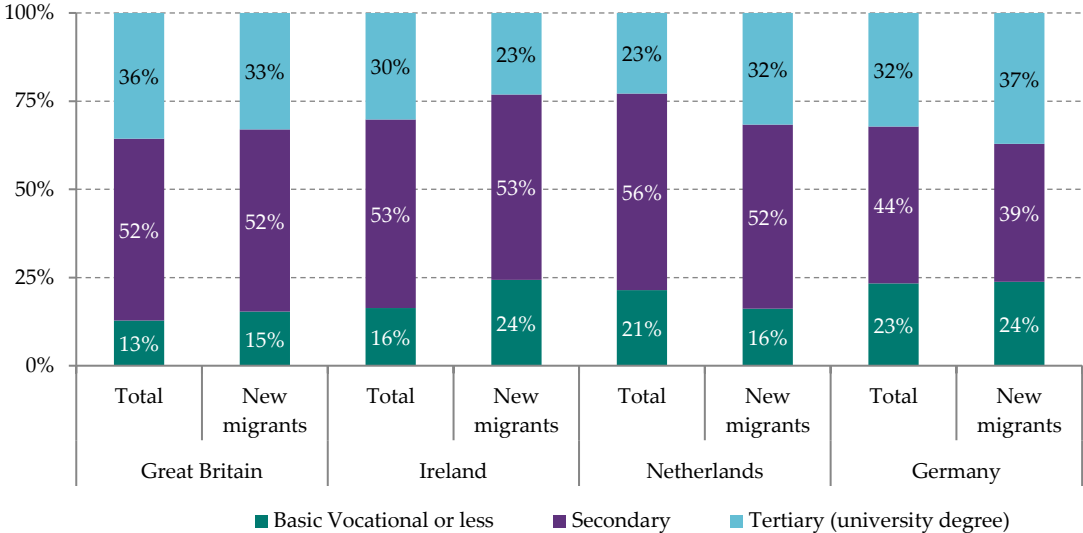
**Figure 2. Structure of migrants in the NBP survey according to age groups**





As far as new migrants are concerned, they do not differ significantly from the overall group of migrants. Among them too, people aged 25-44 represented the biggest group; however, in this case their share ranges from 55.0% in the case of Great Britain to almost 70.0% in other countries. In terms of the average age, new migrants are also only slightly younger (32 years old) than the total population (35 years old). The issue which should be drawn attention to is the exceptionally high percentage of people aged 18-24 who appeared over the recent two years in Great Britain – 40.5%. In the case of remaining countries, differences were not so significant, however, both in Ireland and in Germany the share of the youngest people among new migrants was slightly higher than in the overall population studied (Figure 3).

**Figure 3. Structure of migrants in the NBP survey according to education attainment**



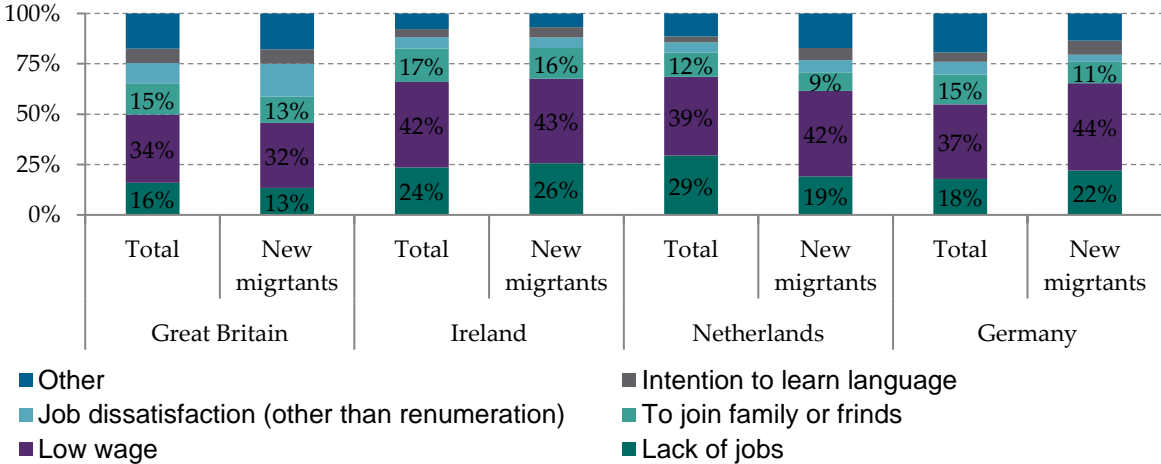
In terms of economic migration, the level of migrants' education is an important variable. In this respect, Poles living in the analysed countries can be considered well educated (Figure 4). People with secondary education prevail among them. In three countries, Great Britain, Ireland and the Netherlands, they constitute over half of the population studied (from 52.0-56.0%). Only in Germany is their share lower, and amounts to 44%, which even so positions this group as the first in terms of size. The share of people with a university degree is also relatively high. Their percentage in all countries apart from the Netherlands accounts for almost one-third of respondents (30.0-36.0%). Although in the Netherlands this share is lower, amounting to 23%, among new migrants it has already reached 32%. The lowest figure is recorded for people with vocational education or lower. They account for 13% in Great Britain to

23% in Germany. Moreover, in the case of Germany this share is equally high, both among the new and the experienced migrants. So far, a similar level was noted in the case of migrants in the Netherlands; however, this share has decreased significantly in the latest migrant wave (from 23% to 16%).

Despite the above-mentioned differences between the level of new migrants' education compared to the overall population surveyed, these groups should be recognised as very similar to each other. No increased interest in migration has been observed, e.g. among the best educated people. In terms of the level of education, the same group of people has been continually interested in migration.

With regard to the factors prompting migration, people currently leaving Poland are driven by the same reasons as people leaving several years earlier (Figure 4). In most cases, economic factors, such as the unsatisfying level of wages and lack of work determined and continue to determine migration, accounting for the migration of 60% of the overall group of migrants and 61% of new migrants. New migrants indicated the unsatisfying level of wages slightly more frequently (40% against 36% among experienced migrants) and the lack of work less frequently (18% of responses against 21%).

**Figure 4. Structure of migrants in the NBP survey according to the reason for leaving Poland**



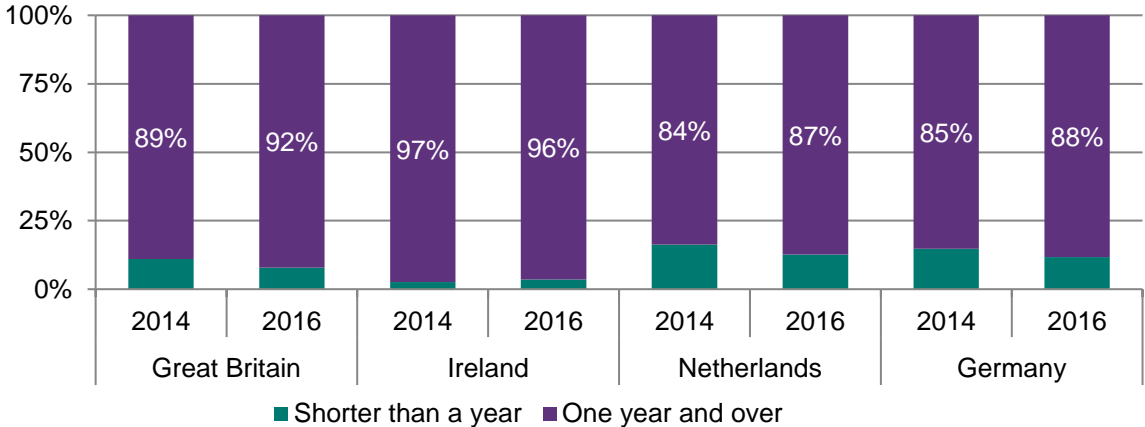
Among the reasons other than work-related, joining family or friends was the most frequent reason for migration. However, this reason was less frequently indicated by new migrants than by the overall group of respondents (11% against 17%). On the other hand, slightly more new migrants decided to leave in order to learn a language (7% against 4% among the overall group of migrants). The percentage of people who decided to leave for other reasons is the same in both groups, amounting to 15%.

As the data collected indicate, although the process of labour migration from Poland has continued for 12 years, the profile of people currently leaving Poland does not significantly deviate from the general migrant’s profile. Women are more willing to search for a job abroad and young people aged 25-44 prevail among migrants.

**1.2. Settlement process**

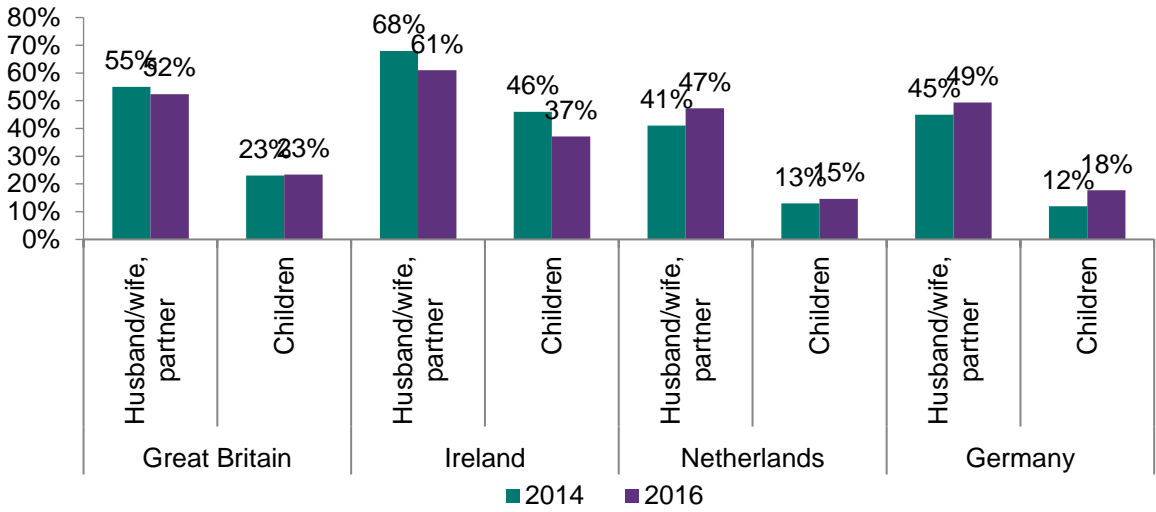
The results of the latest survey confirmed the tendency of migrants’ settlement abroad already observed in earlier years. As before, there is visible growth in the number of emigrants living abroad for a period longer than a year, i.e. people who may be classified as long-term migrants (Figure 5). The highest number of such people is recorded in Ireland – 96% of respondents – and this result is almost identical to that obtained two years ago (a decline by 1 percentage point). In the case of Great Britain, the percentage of people living abroad for a period longer than a year was also very high, amounting to 92%, i.e. it increased by 3 percentage points in relation to the results of the previous survey. The share of long-term migrants in the Netherlands and in Germany increased at the same level, reaching 87% and 88%, respectively in 2016.

**Figure 5. Structure of answers to the question: How long have you been staying in the particular country?**



The continuation of the settlement trend is also visible through the increase in the percentage of people living abroad with their family (Figure 6). This growth is most strongly visible in the case of the Netherlands and Germany. The labour migration to these countries started later than the migration to Great Britain and Ireland, therefore the process of settlement in these countries is still strongly visible. In the case of Great Britain and Ireland, it has already reached a more stable level and slight changes in the tendency are even visible, which may result, for example, from the characteristics of new migrants who appeared in these countries.

**Figure 6. Results of questions concerning family members staying abroad**

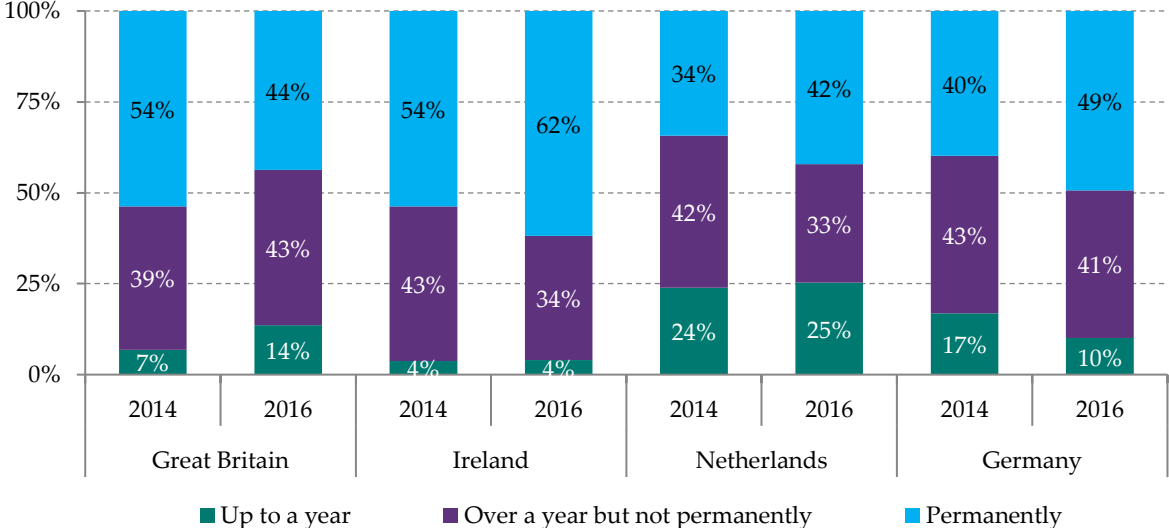


The highest percentage of migrants living abroad with a spouse or a partner was recorded in the case of Ireland, where it reached 62% (Figure 7). Although in relation to 2014 this share has decreased by 7 percentage points, Ireland remains the country with the highest share of such people. Ireland is also the country with the highest number of people caring for at least one minor there. According to the survey results, the share of such people amounts to 37%.

If the percentage of people living in a given country is accepted as the measure of migrants' settlement in such country, Ireland is followed by Great Britain where, according to the survey results, the percentage of people living with a spouse/partner amounted to 52% and the percentage of people with children below 18 - to 23%. In the case of spouses, this percentage has slightly decreased in relation to the previous survey (by 3 percentage points) whereas the percentage of people living with children remained at the same level.

As far as the Netherlands and Germany are concerned, the settlement process interpreted in this way is not as advanced as in Ireland and in Great Britain yet. However, here too almost half of migrants live with a husband or wife – 47% in the case of the Netherlands and 49% in the case of Germany. The percentage of people living abroad with minor children is also growing, amounting to 15% in the Netherlands and 18% in Germany.

**Figure 7. Results of answers to the question: How long are you planning to stay in the particular country?**



Year by year the percentage of migrants who declare that they are willing to stay abroad permanently and treat their current country of residence as their final destination continues to grow. According to the results of the latest survey, even half of migrants declare that they wish to stay abroad on a permanent basis (49%). In the previous survey, a similar declaration was made by 45% of respondents. Most commonly, such an answer was provided by respondents in Ireland, where as much as 62% of respondents want to live permanently. This is result is 8 percentage points higher than the result obtained two years ago, which means that some people who earlier were considering their return to the country have stopped thinking about it.

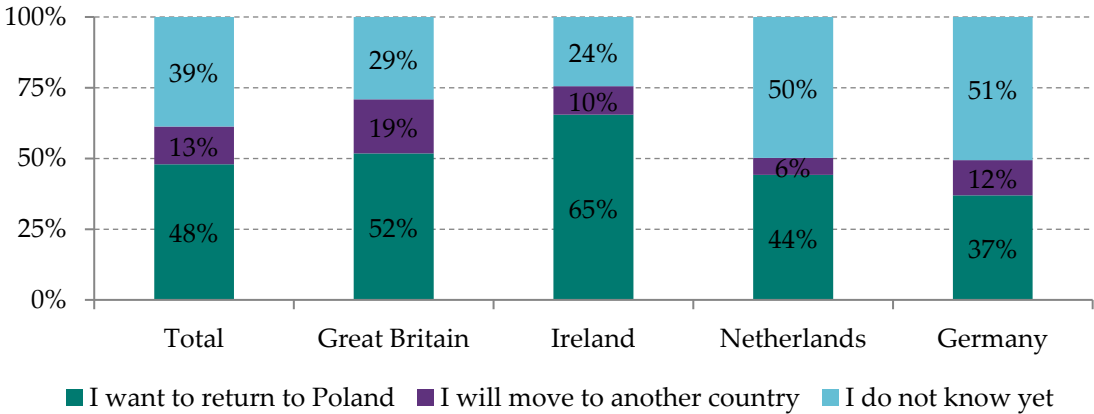
Such measures as the percentage of migrants living abroad with their family or migrants' declarations concerning the duration of migration indicate Ireland as the country where migration most commonly leads to settlement. On the other hand, Ireland is the country where one of the strongest outflows of migrants from Poland was recorded. According to the GUS data, at the end of 2007, 200,000 Poles were staying in Ireland, whereas at the end of 2015, their number reached only 111,000. Thus, it can be assumed that those who stayed there mainly comprise people treating Ireland as their target place of living.

**1.3. Outlook for returns to Poland**

The analyses presented in the previous section imply that 49% of migrants plan to stay abroad permanently. On the other hand, it means that the remaining 51% consider leaving the particular country in either the short- or long-term.

Migrants’ declarations concerning their further plans should be approached with great caution. Observations gathered so far show that migrants tend to change their opinion and decide to continue their stay abroad, abandoning their plans regarding returns (Figure 8). This is best demonstrated by the systematic growth in the share of people intending to stay abroad on a permanent basis, which is increasing year by year. In 2014, such a declaration was made by 45% of respondents, in 2010 by 36% and, for comparison, in 2007, when the survey was performed for the first time, only 18% of migrants considered staying abroad permanently. Nevertheless, the potential further plans of migrants who do not want to stay abroad on a permanent basis seem worth analysing.

**Figure 8. Emigrants’ plans after leaving the country where they currently stay**



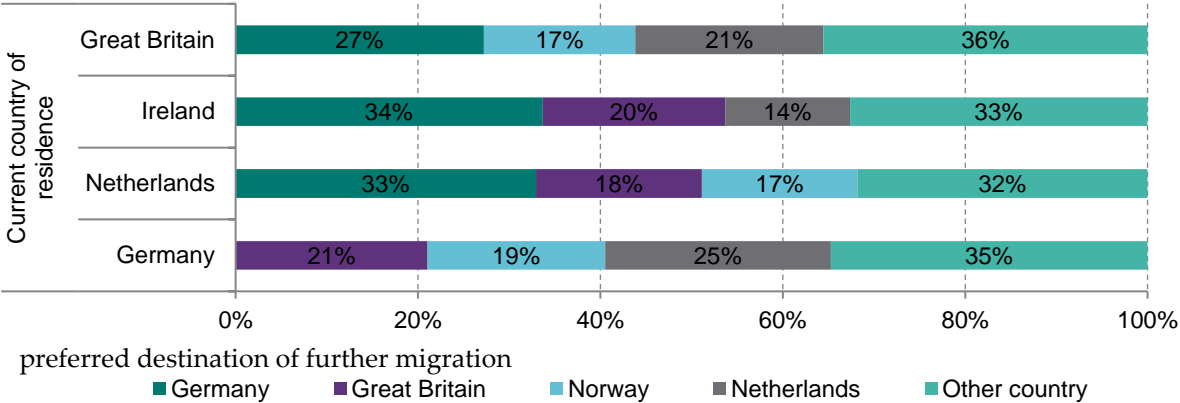
The majority of people who are not planning to stay permanently in the given country either want to return to Poland (48% of responses) or have not taken the decision regarding their destination yet (39%). Only a minor percentage of people (13%) declare that after leaving the given country they will search for a job outside Poland in another foreign country.

Migrants living in Ireland consider returning to Poland most often – 65% of people (obviously, this refers to such people who have declared that they do not want to stay there permanently, i.e. 38% of respondents). On the other hand, the highest number of people who have not yet decided whether they are going to return to Poland or move to another country, is recorded among respondents in the Netherlands and in Germany, respectively, 50% and 51%. 44% of respondents in the Netherlands and 37% of respondents in Germany consider returning to Poland, i.e. less than in the two remaining countries.

The highest number of people who decided to move to another country is noted in Great Britain – 19%, and the lowest in the Netherlands – 6% (Figure 9). In terms of potential destination of further migration, relocation between the three countries participating in the survey would

be most common, i.e. Germany, Great Britain and the Netherlands. The migrants also show a considerable interest in going to Norway. At the same time, respondents in Great Britain, Ireland and the Netherlands indicated Germany as the first country of future migration, whereas people currently living in Germany would be most willing to relocate to the Netherlands.

**Figure 9. Results of answers to the question regarding the country of destination asked to people intending to leave their current place of emigration**



The percentage of migrants considering leaving the current country decreases in the subsequent rounds of the survey, therefore, declarations of migrants regarding their intention to leave should not be treated as binding; however it is worth analysing who are the people considering returning to Poland (Table 2). In the analysis presented below, all migrants who do not want to stay permanently in the given country are included, even if such people have not yet decided on the direction of relocation or if they consider moving to another country. This means people included in Figure 7 in categories ‘up to 1 year’ and ‘over a year but not permanently’. Although it is unknown what the chances are of implementing the plans and where the migrants will go, they will be referred to as returning people for the needs of this analysis. However, it should be emphasised that the conclusions are based only on declarations which do not have to be fulfilled.

The highest number of people considering returning is recorded in the Netherlands – 58%, and the lowest in Ireland – 38%. Men consider returning to Poland more frequently than women. For example, in Germany as much as 61% of male respondents declare that they do not want to stay there permanently, whereas among women, this percentage amounts to 44%, which means that the remaining 56% do not plan to leave the country of current migration. The situation in Great Britain and the Netherlands is similar – there too, men declare that they want to return more often, although the differences in comparison with the results obtained

for women are not so significant. Only in Ireland do women think about returning more often (39%) than men (37%), but the difference in the results is insignificant.

**Table 2. Share of emigrants declaring that they are considering returning to Poland according to the underlying demographic features**

	Great Britain	Ireland	Netherlands	Germany
	56%	38%	58%	51%
	total			
	56%	38%	58%	51%
	Gender			
Women	54%	39%	56%	44%
Men	59%	37%	60%	61%
	age			
from 18 to 24 years	64%	25%	65%	63%
from 25 to 44 years	52%	38%	57%	49%
from 45 to 65 years	72%	49%	50%	48%
	education			
Vocational or lower	57%	35%	62%	58%
Secondary	57%	39%	55%	52%
University	55%	39%	60%	44%

In addition, young people below 24 also think of returning to the country. Over 60% of people from this age category surveyed in Great Britain, the Netherlands and Germany have declared that they do not want to stay in the country on a permanent basis. In the largest age group of 25-44, between 50 and 60% of respondents gave such an answer in those countries. The percentage of the oldest people living in Great Britain who do not want to stay there permanently was also high, amounting to 72%. Once again totally different results were obtained for Ireland. In the case of this country, the oldest people (aged 45 and over) think of leaving most often, whereas the youngest want to leave least often (25%). However, it should be kept in mind that in the structure of the whole population, these are very small groups.

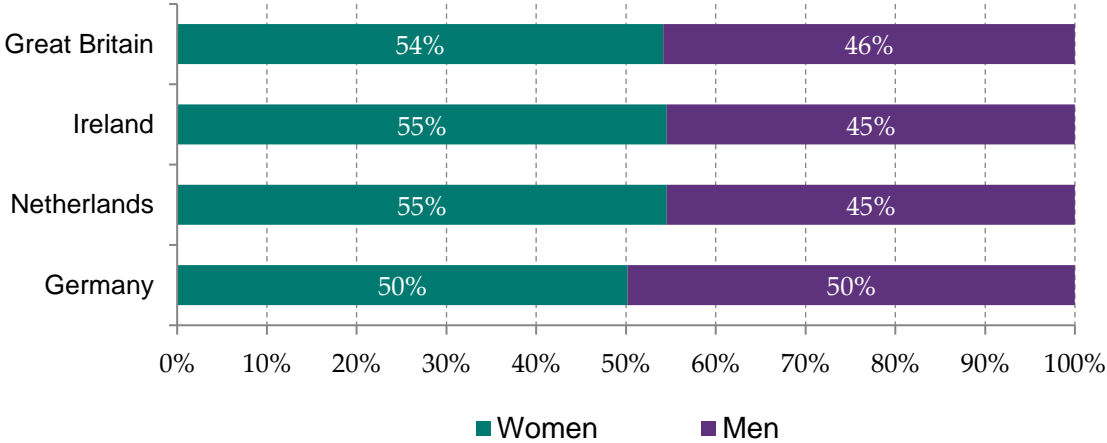
In terms of the level of education of people considering returning, no considerable diversification is visible. The high percentage among people with the lowest level of education from the Netherlands and Germany is worth attention. They declared that they want to return more often than others. On the other hand, the group considering returning least frequently is people with higher education in Germany.

From the point of view of the Polish labour market, besides the intentions of individual groups, their size is also important, i.e. the potential structure of the group which would return to the

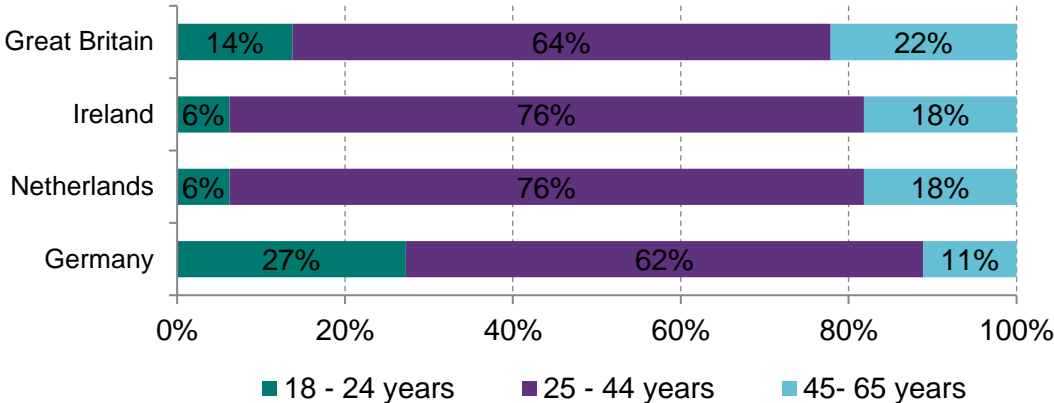


country if they fulfilled their declarations. Although, men, for example, think of leaving their current migration country more often, the share of women among returning migrants would be slightly higher, as a result of their bigger number (Figure 10). In the structure of people who could potentially return to Poland, women make up exactly a half in the case of migrants returning from Germany, but in the case of those returning from the Netherlands or Ireland they already constitute 55%.

**Figure 10. Percentage of people considering leaving the particular country according to gender**



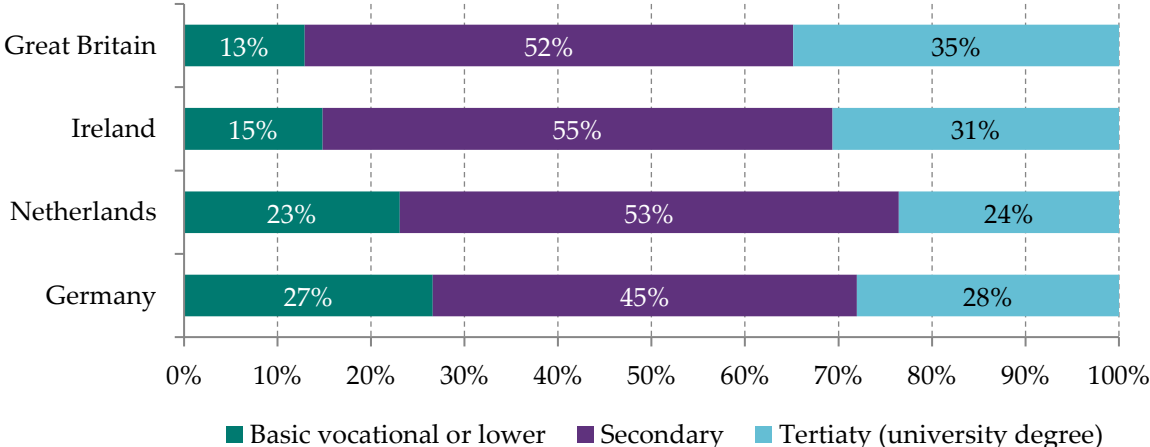
**Figure 11. Percentage of people considering leaving the particular country according to age**



As far as the age structure is concerned, people aged from 25 to 44 account for the biggest proportion of those considering returning – from 62% in Germany to 76% in Ireland and the Netherlands (Figure 11).

In terms of education, in the case of potential returns, people with secondary education would represent the largest group – from 45% in the case of migrants returning from Germany to 55% in the case of people from Ireland. In the case of Great Britain and Ireland, returns of people with higher education could also be expected – over 30% of those potentially returning. On the other hand, in the case of Germany and the Netherlands, both people with the lowest and those with the best education account for approximately one-fourth of migrants considering returning (Figure 12).

**Figure 12. Percentage of people considering leaving the particular country according to education**



## 2. Professional and financial situation

- Emigrants from Poland, like emigrants from other countries, most commonly work in specific labour market sectors, mainly in the industrial sector and personal services.
- Emigrants from Poland adjust to the specific nature of labour markets: emigrants in the British Isles more and more frequently work in sectors and professions where they can use their qualifications. Emigration in the Netherlands means mainly unskilled work in agriculture.
- The average declared net remuneration of emigrants in all countries exceeded PLN 6,000 (over twice as high as the average net remuneration in Poland). The average difference between the wage for which emigrants would consider returning to Poland and the average wage in Poland ranged from PLN 1,800 to PLN 2,600, depending on the country.
- Social benefits abroad are mainly used by households of working emigrants. Employment of emigrants from Poland is favourable from the point of view of the public finances of target countries.

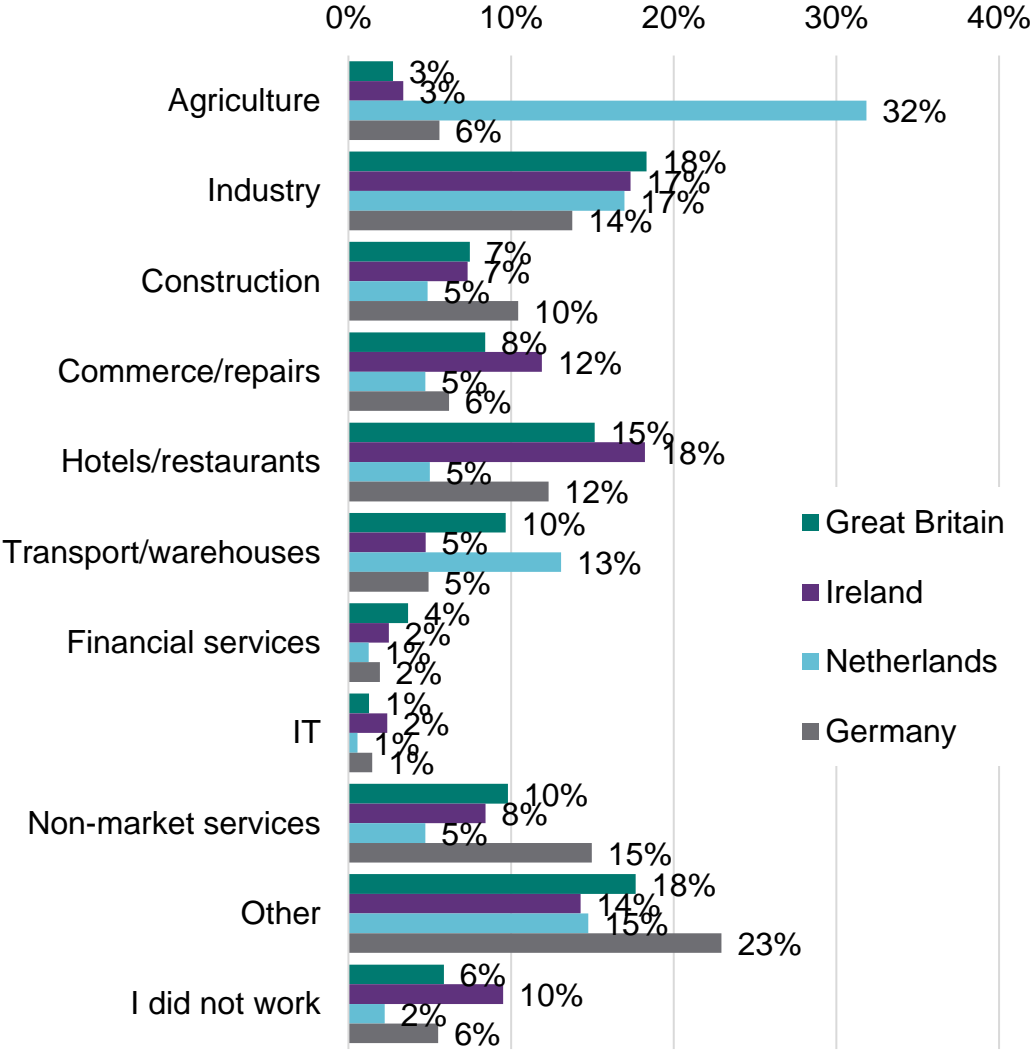
### 2.1. Employment of Polish emigrants in foreign labour markets

The questionnaire surveys confirm that the main reason for emigration for the majority of people is the difference in wages or the lack of a job (see: Figure 4). This chapter analyses the basic information regarding the characteristics of employment and income of emigrants from Poland in foreign labour markets.

Surveys of emigrants indicate that the universal feature of mass emigration processes is selectiveness in the choice of sectors and professions in which they work. These are usually jobs where lower qualifications are required. The data on emigrants from Poland partly confirm this claim, but at the same time they indicate the diversity of sectors where emigrants in various countries end up (Figure 13 **Błąd! Nie można odnaleźć źródła odwołania.**). Polish emigrants working in **Great Britain** were most frequently employed in the industrial sector (19.5%) as well as in the hotel and restaurant sector (16.1%). Other sectors where Poles work include transport, commerce and repairs, and construction (the majority of entrepreneurs operate in this sector – approximately one-fourth). The structure presented is similar to that obtained from the 2014 NBP survey results; however, the type of work performed by Polish emigrants has changed. The sectors of Poles' employment in **Ireland** are similar as in the case of Great Britain. At the same time, the hotel and restaurant sector is most important (17.2% of employed people work in this sector). Commerce, repairs, industry, and transport also had a

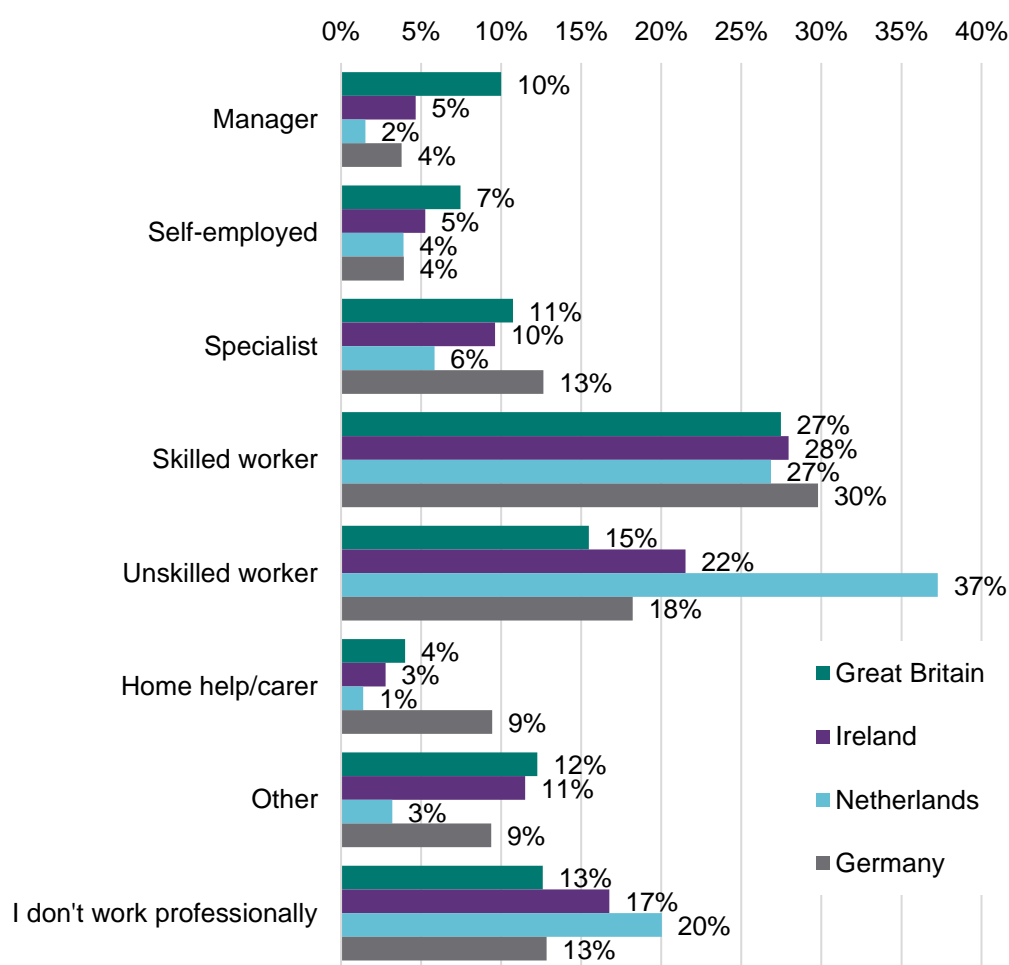
significant share. Poles working **in the Netherlands** most commonly selected the agricultural sector. Transport and warehouse management sectors were also more significant than in other countries. The labour market of emigrants from Poland in **Germany** seems most diversified. In terms of emigrant employment, industry was the most important sector; however, it accounts for only 14.6% of the overall market. A slightly lower number of Poles worked in hotels and restaurants (13%) and in the construction sector. A relatively high percentage of emigrants from Poland declared the answer 'other', which may be interpreted as a lack of association with a specific sector or work in several sectors simultaneously.

**Figure 13. Employment structure of emigrants from Poland according to sectors**



Immigrants' employment sector is closely related to the type of profession practised by emigrants (**Błąd! Nie można odnaleźć źródła odwołania.**). In the current survey, skilled workers have the highest share (31%) in the **British labour market**.

**Figure 14. Type of work performed depending on country**



The second largest group in terms of the job practised is people performing unskilled work (18%), although its share decreased compared to the previous surveys. According to the survey conducted in 2016, approximately 14% of Polish emigrants in Great Britain did not work.

Taking into account that respondents move abroad for work purposes, this figure is quite high. This group of unemployed comprises both people searching for a job at any given moment and people professionally inactive. Thus, the unemployment rate is at a lower level, reaching 9.9%.

**In Ireland**, contract work prevailed (28.7%); however, the share of people working on a casual basis was also high (27.4%). The significant share of casual work resulted from high employment in the hotel and restaurant sector as well as health care and social welfare.

While analysing the type of the work performed, it can be noticed that even more than in Great Britain, the Irish labour market is dominated by skilled workers and employees performing unskilled work (56.8% in total). It should also be emphasised that Ireland is the country with the highest unemployment level among Polish emigrants. It amounts to 11.6% (the share of people not working is 14.5%).

**In the Netherlands**, among types of work performed, unskilled work prevailed by far (40.2%). The unemployment rate among Polish emigrants working in the Netherlands amounts to only 4.3% and is the lowest rate among the economies analysed (the total share of people not working professionally is 5.5%). The low unemployment level in the Netherlands compared to other countries is associated with the high share of seasonal work in this country. Over one-fourth of emigrants work in this way. Seasonal workers usually know already before emigrating where they will be employed and they do not remain jobless after arriving at the given country.

**In Germany**, qualified workers represented the largest group (33.6%). This was followed by emigrants doing unskilled work (20.5%) and work related to home help (9.8%). The share of specialists and self-employed was not high, amounting to, respectively, 14.2% and 4.4% of the total group of respondents. Over one-fourth of Poles working in Germany are employed permanently and the scale of people doing casual work is similar.

One of the problems of the labour market in Poland in 2016 was the **instability of employment contracts**. Survey data from immigrants allows to from the questionnaire surveys allow assessment to what extent emigration was correlated with achieving more stable form of employment (Table 3).

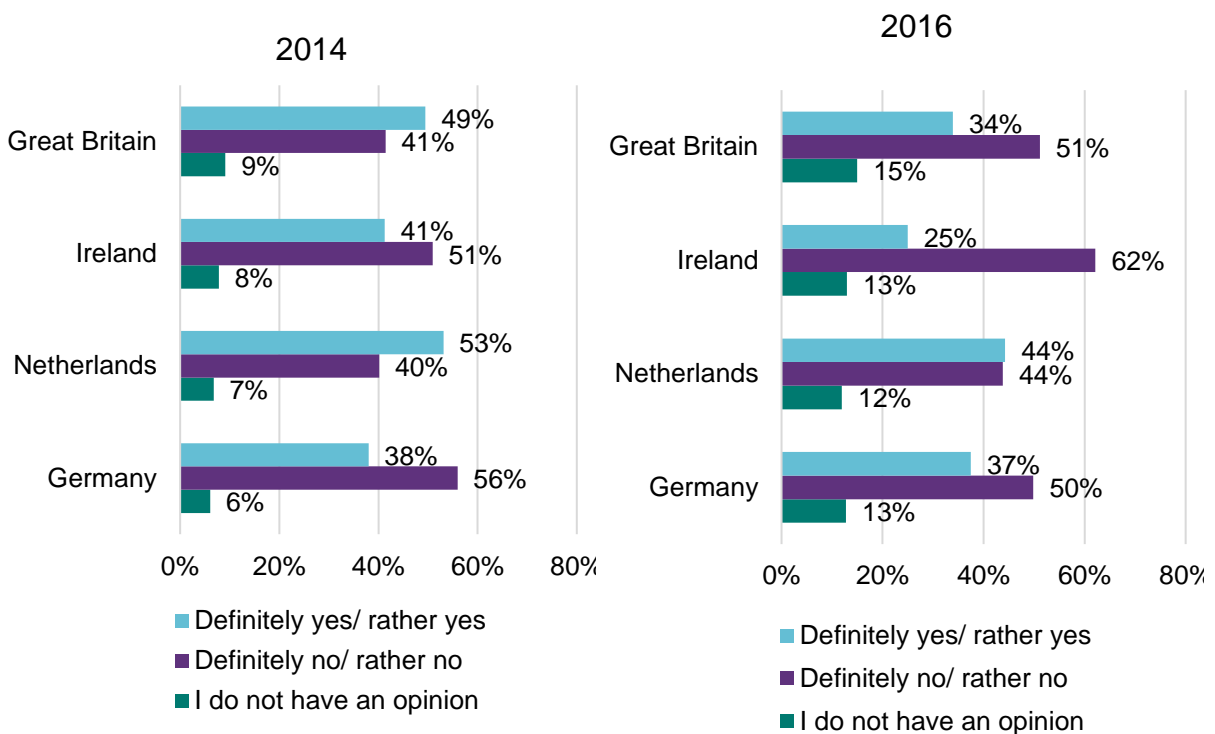
**Table 3. Type of work during emigration depending on the type of work in Poland before emigration (data for all four countries)**

Status on the labour market before emigration	Status on the labour market during emigration								Total
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	
(1) contract casual work	9	6	43	7	1	26	7	1	100
(2) contract seasonal work	12	11	40	4	2	22	4	5	100

(3) contract long-term work	6	3	65	7	1	9	6	3	100
(4) self-employment	1	5	37	24	10	13	7	4	100
(5) entrepreneur	0	0	21	19	19	8	27	6	100
(6) other type of work	2	2	14	11	2	59	7	4	100
(7) unemployment	2	7	38	6	1	27	14	5	100
(8) inactivity	7	2	30	10	5	26	13	7	100

Theoretically, through its temporary nature, emigration has no positive impact on employment stability (Figure 15). It turns out that very often emigrants working in Poland on a seasonal or casual basis declared after emigration that they worked under more stable employment contracts. In the case of casual work, such a change applied to 43% of people and in the case of contract work – to approximately 40%. Stable and well-paid work abroad was also often selected by people working in Poland on their own account (21%) or people self-employed in Poland (37%).

**Figure 15. Results of the question concerning work below one's qualifications**

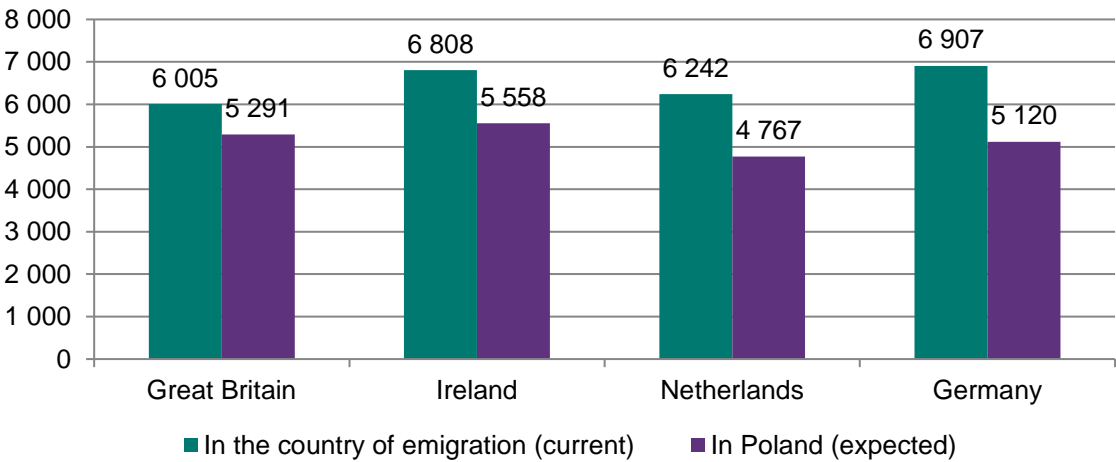


Emigration is very often associated with the failure to use one’s own qualifications acquired in the home country (brain waste). In the case of emigrants from Poland, this phenomenon was analysed using self-assessment in the question regarding work below one’s own qualifications (Figure 15). In 2014, the percentage of people declaring work below their qualifications was slightly below 40% only in Germany, whereas in Holland and in Great Britain it amounted to 53% and 49%, respectively. The 2016 survey indicates that the percentage of people answering that they work below their qualifications decreased. It continued to remain at the highest level in Holland (44%) where the demand for workers from Poland applied mainly to unskilled work. The share of people declaring work below their qualifications has not changed significantly in Germany (38% in 2014 and 37% in 2016). On the other hand, in Great Britain and Ireland work below qualifications was declared by approximately 15 percentage points fewer people than two years earlier. This means that in these countries the selection of workers towards those whose qualifications were compliant with the work performed proceeded at a faster pace, which may stabilise the migration stays of people who remained there.

**2.2. Finance of Polish emigrants’ households**

Polish emigrants earn, on average, a gross salary of GBP 1,423 in Great Britain, EUR 1,775 in Ireland and EUR 1,613 in the Netherlands as well as EUR 1,824 in Germany. The average monthly amount actually received by Poles in Ireland is EUR 1,561 EUR, in the Netherlands EUR 1,431 and in Germany EUR 1,583. Converted into PLN (Figure 16), emigrants in Germany earn the highest salary (PLN 6,907), whereas emigrants in Great Britain earn the least (PLN 6,005).

**Figure 16. Average net wage (in PLN)**

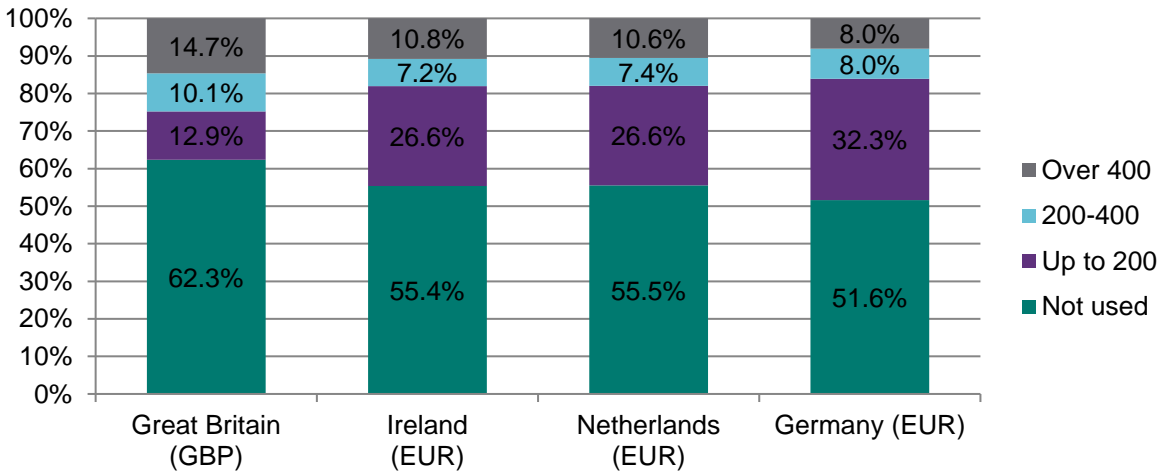




Those differences partly stem from different employment sectors in individual countries, but also from various fluctuations of the EUR/PLN and EUR/GBP exchange rate and the EUR/GBP exchange rate. The net remuneration in the Netherlands (PLN 6,242) was higher than in Great Britain, but significantly lower than in Germany and Ireland (PLN 6,808). The relatively low earnings in the Netherlands may partly result from the fact that the majority of Poles working in this country are employed in the agricultural sector, where wages are usually lower than in such sectors as construction, industry, or hotels and restaurants.

The above amounts are worth comparing to the level of remuneration in Poland which could prompt emigrants to return to our country and the average net wage in the Polish economy, which amounted to approximately PLN 2,900 in 2016. Poles in Great Britain expect earnings in Poland which would be closest to what they earn abroad. They declared on average that a remuneration about 15% lower than they receive abroad would satisfy them. In the remaining countries, Poles were prepared to resign from the major part of their remuneration earned abroad in favour of their return to Poland. In all three countries, the difference between current earnings and the expected remuneration in Poland is over PLN 1,000. The factor determining the above results is not the issue of how much Poles earn abroad. Regardless of the country of emigration, the remuneration in Poland that would be satisfactory for those who left is approximately PLN 5,000 net. The survey shows that emigrants increase their revenue through social benefits to a moderate extent (Figure 17).

**Figure 17. Structure of answers to the question concerning the value of monthly social benefits used by the household**

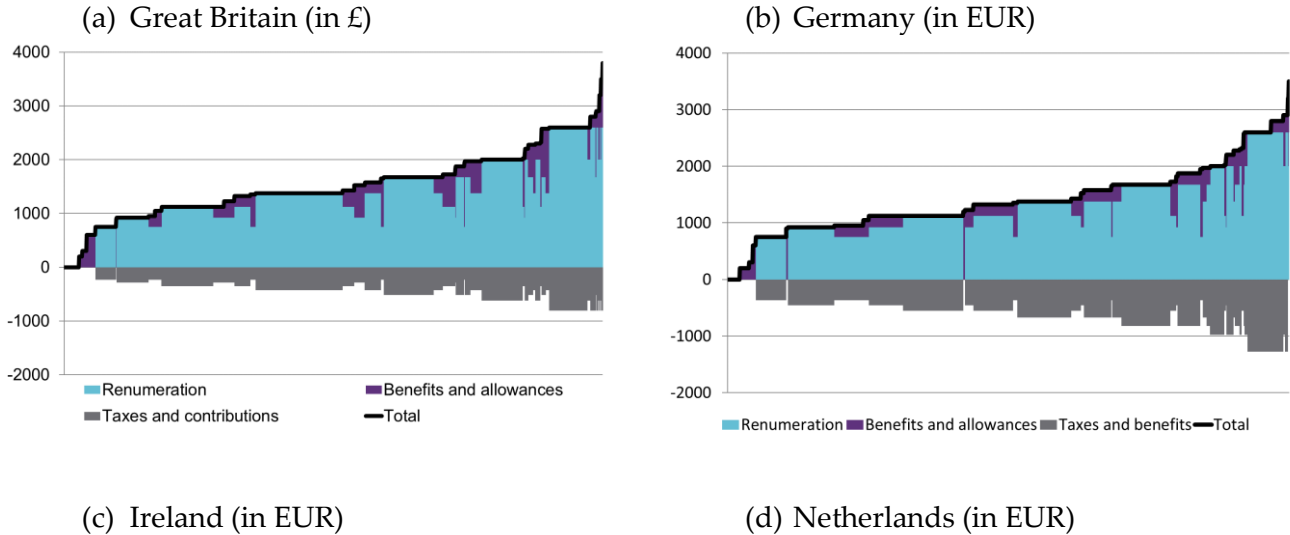


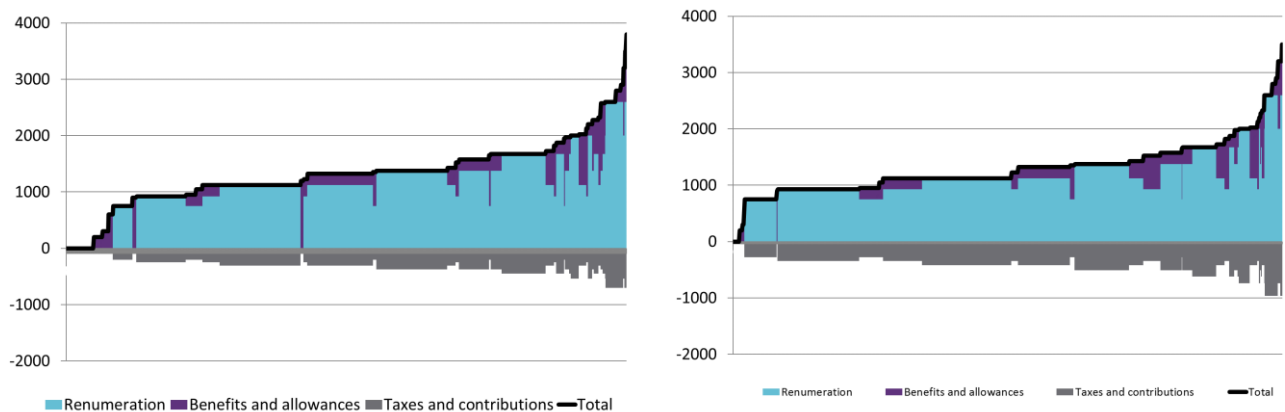
In all countries, less than a half of respondents collect any benefits (47.7% in Great Britain, 44.6% in Ireland, 44.5% in the Netherlands and 48.4% in Germany). On the one hand, the share

of people collecting benefits is the lowest in Great Britain; however, this is where the benefits are the highest. On average, people using British social benefits receive GBP 421. To a certain extent, this compensates their lowest earnings in relation to other emigration countries. The average level of benefits in Ireland is EUR 360, in the Netherlands EUR 343, and in Germany EUR 307.

In terms of the analysis of costs and benefits of individual countries due to employing emigrants from Poland, it is worth looking at the approximate distribution of households' income on account of remuneration and social benefits compared to the estimates regarding taxes and fees paid directly against the remuneration (wage wedge). presents households in samples examined in individual countries, arranged from the lowest to the highest income and in the particular income category, starting from those receiving the highest to the lowest benefits. The percentage of people living only on social benefits in the examined samples was very low and the average value of those benefits was relatively insignificant (Figure 18). Relatively higher social benefits were received mainly by households with working people and relatively higher income from work.

**Figure 18. Distribution of monthly inflows and theoretical levels of taxes and contributions\* of emigrant households**





\* The value of taxes and contributions calculated based on the data on remuneration and information on the wage wedge according to countries, published by the OECD.

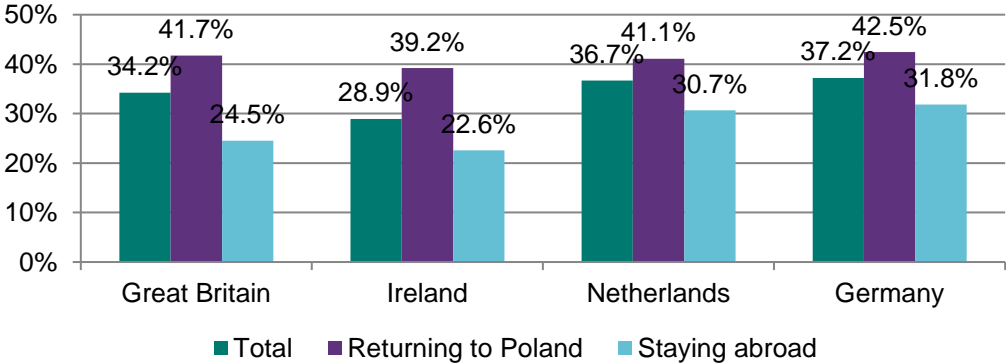
Based on the data on remuneration and the data on the level of the wage wedge in individual countries, it is possible to estimate the level of taxes and contributions paid by immigrants against the income from work. The wage wedge was the lowest in relative terms in Ireland and the highest in Germany. On the other hand, it was in Germany where the average payouts related to social welfare and allowances were the highest. The comparison of the value of benefits paid to the estimates of public levies paid by emigrants leads to the conclusion that so-called social migration in relation to emigrants from Poland is a myth. In each of the specified countries, public expenditure on benefits constituted only a fraction of the public income gained from the work of Polish emigrants. This ratio was highest in Ireland (52%) due to the continuing high unemployment and a relatively low taxation of income from work. In Great Britain and in Holland, this ratio reached approximately 35%, whereas the lowest ratio of the sum of benefits to the estimated sum of tax levies and contributions was in the case of Germany (approximately 25%), which was associated, on the one hand, with the relatively good situation on that labour market, and on the other hand with the relatively high wage wedge compared to other emigration destinations.

### 3. Remittances of Poles on account of work abroad

- People declaring their willingness to return to Poland in the future send remittances to Poland significantly more often.
- Emigrants in euro area countries send remittances to Poland mainly via bank transactions. In Great Britain, transfers through specialised companies prevailed.
- The recipients of the majority of remittances are the same people who send them – their life activity is associated both with emigration and the country of origin.
- Remittances are most frequently made once a month. On average, the highest transfers come from Germany.

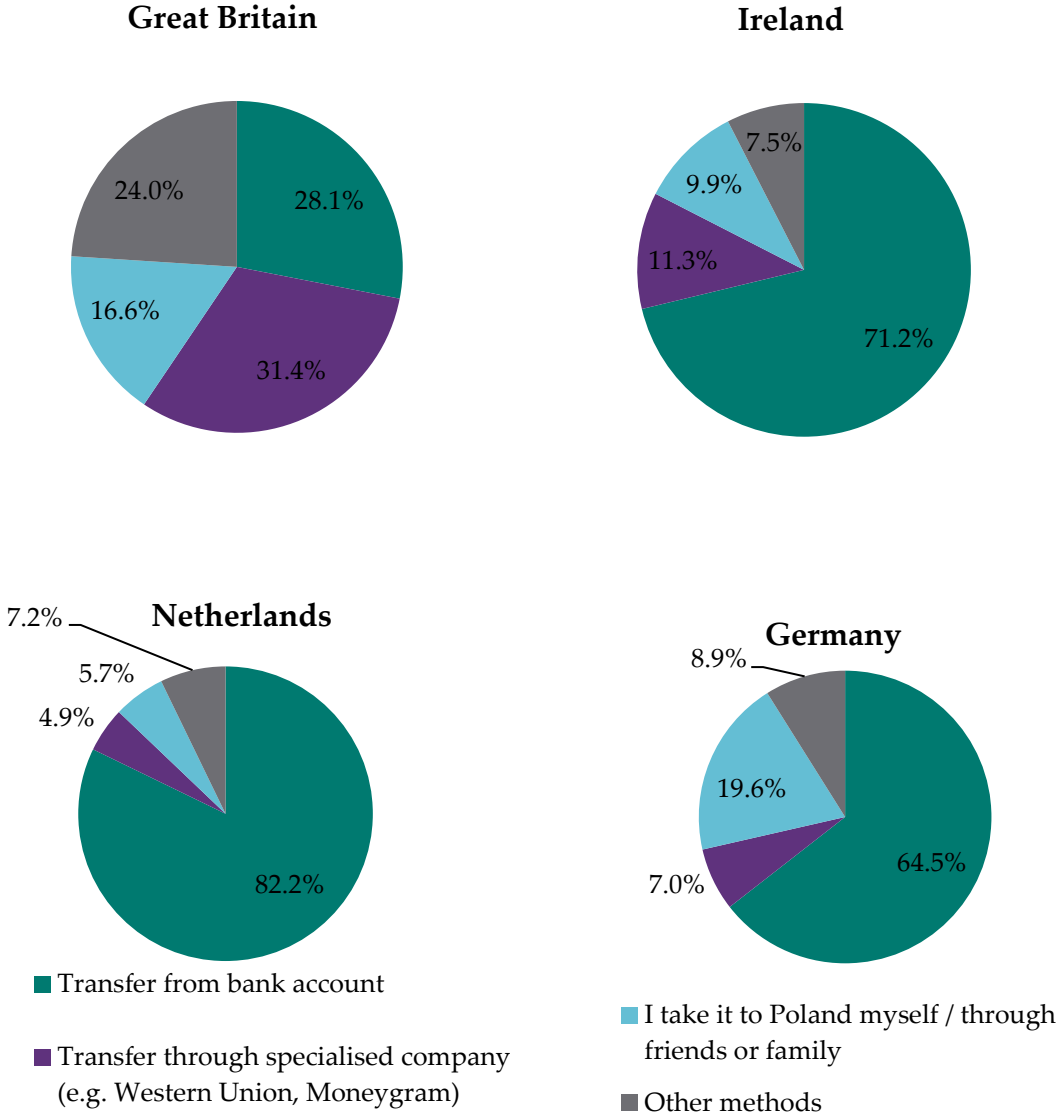
The characteristics of Polish emigrants abroad in all countries analysed (Great Britain, Ireland, the Netherlands, Germany) are similar. About one-third of Poles send remittances to Poland. However, Polish emigrants staying in Great Britain and Ireland transfer their earnings to a lesser extent compared to emigrants from the continent (remittances in Ireland were declared by 28.9% of respondents, in Great Britain by 34.2%, in the Netherlands by 36.7% and in Germany by 37.2%). Differences between these two pairs of countries arise mainly from a different propensity to transfer their earnings for people planning a permanent stay abroad. People who are not planning to return to Poland transfer their earnings less frequently, which may be associated with the fact that the centre of their life interests or their closest family are already located abroad. The share of people sending remittances to Poland in this group amounts to 22.6% in Ireland, 24.5% in Great Britain, 30.7% in the Netherlands, and 31.8% in Germany. About 40% of people in the four countries under discussion (Figure 19) who plan to return to Poland have stated that they transfer the money they earn to Poland.

**Figure 19. Percentage of people transferring a part of their earnings to Poland according to the declaration to stay abroad**



In countries where euro is the legal tender, bank transfer is the prevailing form of remittances. This form is used by 71.2% of Poles in Ireland, 82.2% in the Netherlands, 64.5% in Germany, but only 28.1% in Great Britain (Figure 20).

**Figure 20. Declared methods of sending remittances according to the emigration country**

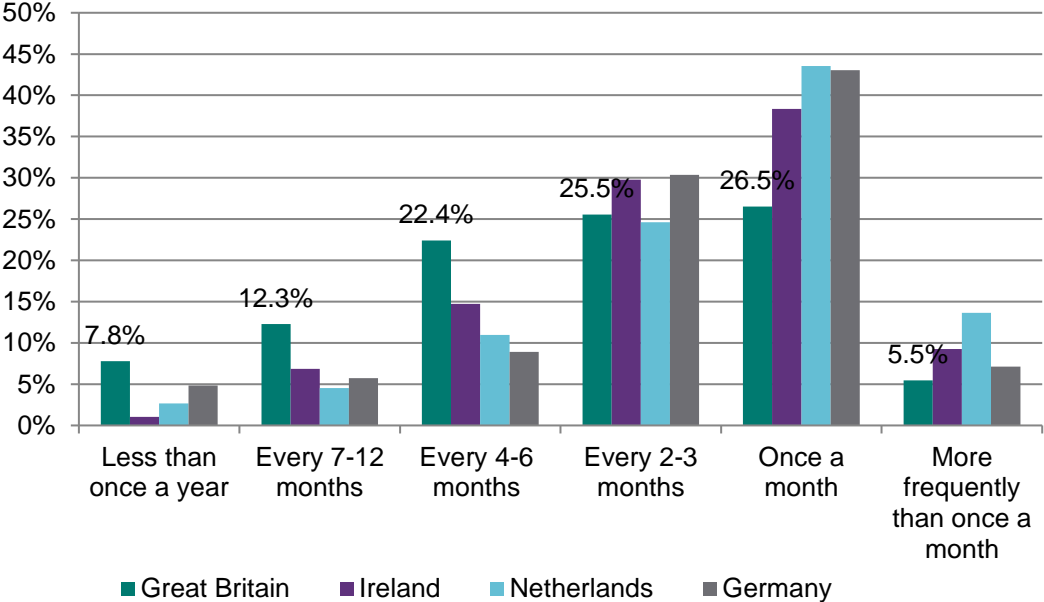


Holding an account in euro in a Polish bank is much more common than holding an account in pounds; therefore, transfers between accounts in the same currency in two different countries are more frequently performed in euro. In Great Britain, emigrants most frequently use specialised companies such as Western Union (31.4%) in order to send remittances. A relatively large number of people transport money to Poland personally or entrust it with family

or friends. Other forms of sending remittances include on-line services (e.g. PayPal), postal orders and payment cards (credit, debit, etc.). Respondents justify their choice of the method of money transfer by economic and practical aspects. The low cost of money transfer is important as well as its speed, ease of service, and security. Such factors as high level of customer service or intention to avoid taxes were less important.

Emigrants usually transfer money once per month or every two to three months (Figure 21). In Great Britain, the question regarding the frequency of transfers was answered by indicating “once a month” by one-fourth of respondents, “every two to three months” by one-fourth of respondents; almost one-fourth answered that they sent remittances once every four to six months, and the rest more frequently than once a month or less frequently than once every six months. In the remaining countries, answers “once a month” and “every two to three months” prevailed. One of the above answers was given by 68.2% of people in Ireland, 68.2% of people in the Netherlands, and 73.4% of people in Germany. The average frequency of remittances from Great Britain was 6 times per year, from Ireland and Germany 8 times, and from the Netherlands 9 times per year. The lower frequency of transfers from Great Britain may imply weaker family and emotional ties with Poland.

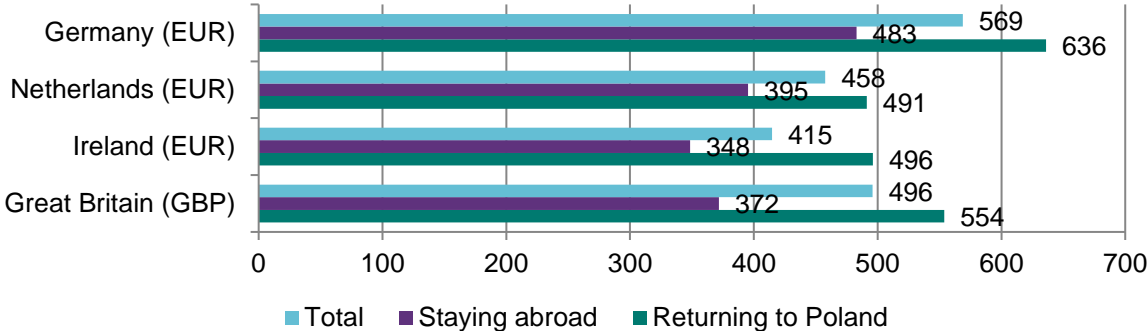
**Figure 21. Results of answers to the question concerning the average value of the last transfer made**



The average amount of a single transfer (Figure 22) from Great Britain is GBP 496, from Ireland EUR 415, from the Netherlands EUR 458, and

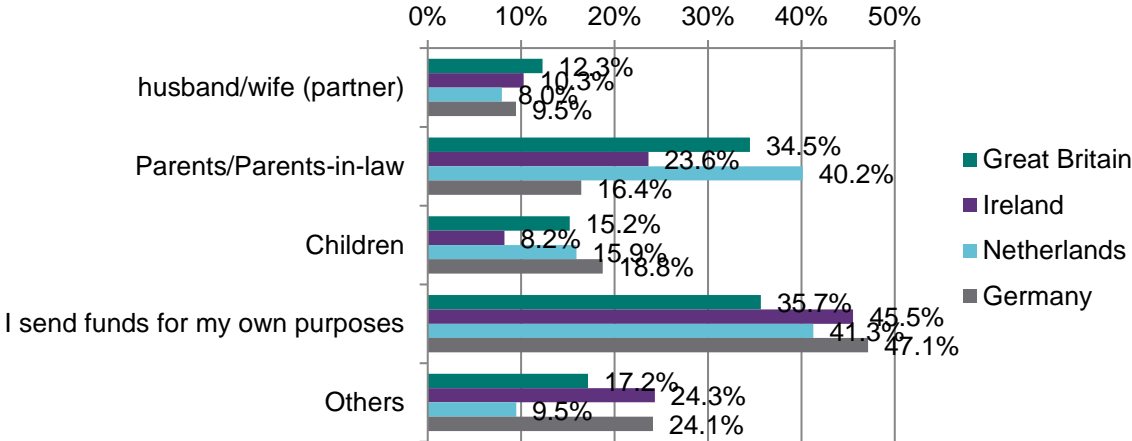
from Germany EUR 569. After conversion of these amounts into PLN according to the average exchange rates of 2016, it can be concluded that the highest average transfers are received from Great Britain (PLN 2,501), although they are only slightly higher than transfers from Germany (PLN 2,461). The average transfers from Ireland and the Netherlands amount to PLN 1,980 and PLN 1,795, respectively.

**Figure 22. Results of answers to the question concerning the average value of the last transfer made**



Emigrants usually do not transfer money directly to family members (Figure 23), instead transferring it from their account abroad to their own account in Poland (over one-third of respondents).

**Figure 23. Results of answers concerning beneficiaries of the remittances**

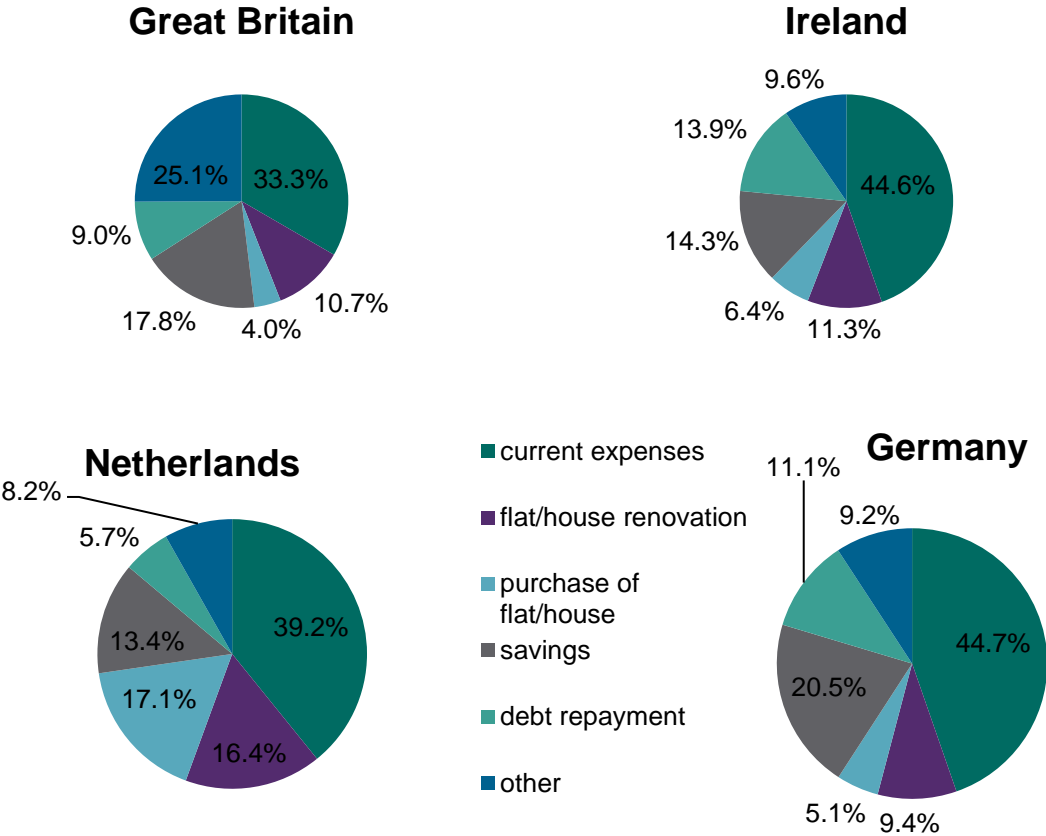


Among family members, parents or parents-in-law are the most common beneficiaries (40.2% in the Netherlands, 34.5% in Great Britain and 23.6% in Ireland). Poles in Germany are an

exception, transferring money more commonly to children (18.8%) and others (24.1%). A small group of people send money to their spouses or partners (from 3.0% to 10.6%, depending on the country). The share of people transferring funds to their own account is higher in the group of people planning to return to Poland permanently (on average, by 9.5 percentage points compared to people declaring that they want to stay in the country of emigration). The difference between these two groups is also visible in the purposes for which the transfers are allocated. The share of people who allocate these funds for savings is, on average, 3.9 percentage points higher among emigrants who are not planning to stay abroad permanently.

In the overall population, current expenses represent the most frequent purpose, e.g. in Great Britain 33.3%, in Ireland 44.6%, and both in the Netherlands and in Germany 39.2%. Important categories also include those related to real estate, purchase of a flat/house or renovation of a real estate (Figure 24).

**Figure 24. Results of answers concerning purposes of remittances**





## 4. Consequences of Brexit

- **The referendum on Brexit did not significantly affect Poles' plans to return from emigration in Great Britain, on the contrary, GUS data indicate increased emigration throughout 2016.**
- **In 2016, 20% of analysed emigrants already had resident status and the majority of those who did not declared that they wanted to acquire it.**
- **In the opinion of 30% of respondents, the referendum campaign caused a deterioration in relations between the British and emigrants from Poland.**

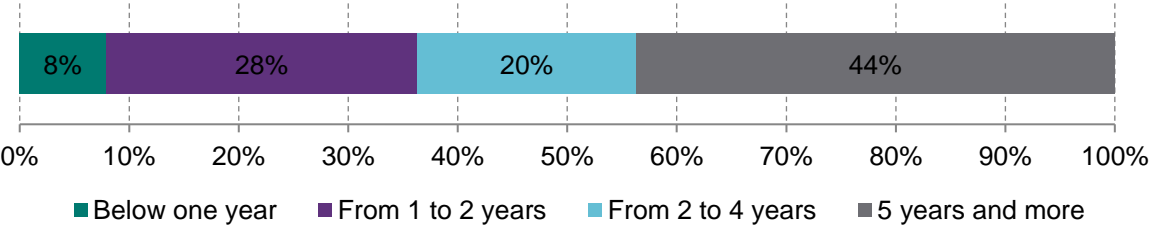
In June 2016, i.e. several months before the survey, a referendum was held in Great Britain in which the country voted to leave the European Union structures, i.e. so-called Brexit. Details of the procedure of Great Britain's exit from the European Union are still unknown; however, it is obvious that the situation of migrants staying in this country will be one of important aspects.

According to the regulations effective at the moment of the referendum, people staying in Great Britain over a continuous period of at least 5 years may apply for permanent resident status. However, at present (in July 2018) it is already known that situation of the remaining people who at the moment of performing the survey stayed in Great Britain for a shorter period was made dependent on the relatively favourable adoption of the threshold date from which the stay will be calculated, i.e. 31 December 2020. Moreover, all people arriving in Great Britain before that date will be able to stay in its territory until they have reached the required period of 5 years (temporary stay) and subsequently apply for permanent residence. According to such rules, at the moment of the 2016 survey 44% of respondents already had an adequate migration record (Figure 25). Another 48% of respondents may easily obtain a permanent residence permit even before the threshold date by simply remaining in Great Britain. Finally, 8% of emigrants who in 2016 had stayed in Great Britain less than one year, will have to remain in Great Britain for less than a year from the threshold date in order to obtain permanent residence. Moreover, GUS data indicate that in 2016 the negotiations of new regulations attracted additional emigrants from Poland (Table 1), which may be associated with an increased interest to acquire a work record in the British Isles authorising to obtain a permanent residence permit after Great Britain's exit from the EU.

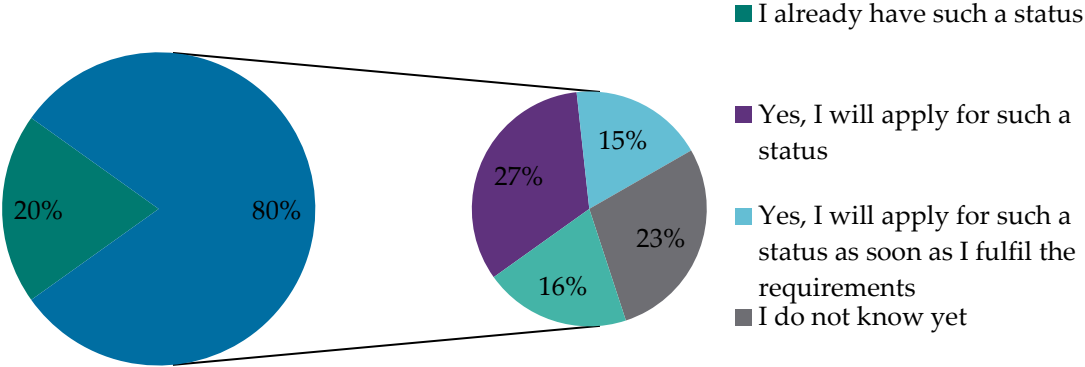
According to the declarations of migrants themselves, at the moment the survey was conducted in 2016, almost 20% of them already had permanent resident status (Figure 26). A further 27% met the conditions set and planned to apply for such status. The remaining people

who did not fulfil the formal requirements were divided into those who will apply for resident status after fulfilling the conditions (15% of respondents) and those who are either not interested in it (16%) or have not taken a decision yet (23%).

**Figure 25. Results of answers to the question: How long has your current stay in Great Britain lasted?**

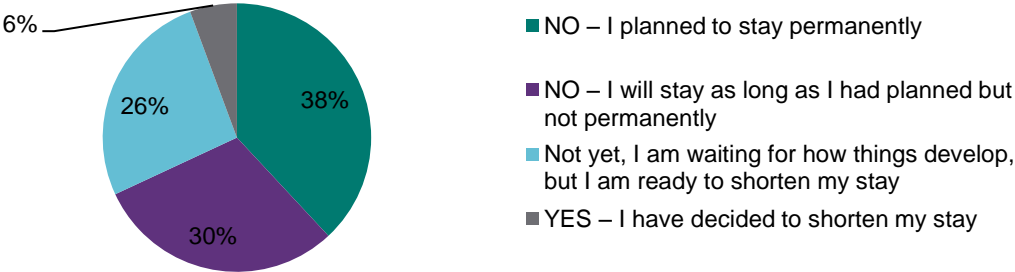


**Figure 26. Results of answers to the question: Do you intend to apply for permanent resident status in Great Britain?**



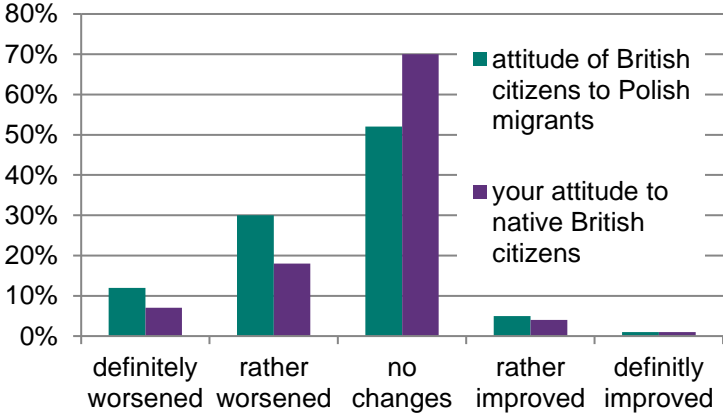
Despite the result of the referendum, in 2016 Poles were quite optimistic regarding their situation in Great Britain (Figure 27). 38.1% of respondents declare that despite Brexit they plan to stay in Great Britain permanently and another 30.0% will stay as long as they planned. On the other hand, 26.3% of people are waiting for further developments, but they are ready to shorten their stay should such a necessity arise. Only 5.7% declared as early as at the stage of the survey that they would shorten their stay in Great Britain in connection with the referendum results. As it has turned out, this expected optimism was reflected in the GUS statistics showing increased emigration to the British Isles after the referendum.

**Figure 27. Has the result of the referendum on Brexit affected your plans concerning your continued stay in Great Britain?**



The results of the survey indicate that Poles have changed their attitude towards their stay in Great Britain under the influence of the Brexit-related referendum campaign only to a limited extent. Moreover, in the survey conducted in 2016, over 70% pointed out that the Brexit campaign had not affected their attitude to British people or had even improved it. On the other hand, almost 30% of respondents had the opposite opinion (Figure 28).

**Figure 28. How has the attitude of Poles to the British and the British to Poles changed under the influence of the Brexit campaign?**



# Survey methodology

The survey was performed by means of the direct interview method, with the use of portable computers – CAPI (Computer Assisted Personal Interviewing) in the period from October to December 2016. Questionnaire surveys were conducted in four countries on a sample of 1,500 interviews in Great Britain, 1,500 in Germany, 1,000 in Ireland and 700 in the Netherlands. The survey was conducted on a group of Polish emigrants aged 18-65 who had left the country for work purposes.

The selection of the sample in all the countries was of a stratified and targeted nature, where regions in which the survey was performed were the layers. The targeted selection of respondents was performed within an established age structure (in the form of ages categories). In addition, at a country level, a number of criteria were imposed, ensuring the examination of the minimum quota of various respondent groups distinguished in terms of gender, profession practised, and employment sector. The criteria were adjusted separately for each country to reflect the specific character of the particular labour market and Polish emigrants present on it.

The survey performed in 2016 was the eighth round of the survey conducted by Narodowy Bank Polski since 2007. Since 2012 the survey has been carried out every two years.