SITUATION OVERVIEW

HOUSING, LANGUAGE AND EMPLOYMENT: Are refugees from Ukraine finding stability in Germany after more than two years of the full-scale invasion?

Longitudinal Survey of Ukrainian Refugees, Round 25 — May 2024

SUMMARY OF KEY FINDINGS

1 **MORE AND MORE SURVEYED UKRAINIANS WERE FINDING HOUSING SECURITY IN GERMANY AND REPORTED A BETTER LIVELIHOOD SITUATION THAN IN THE REST OF EUROPE:** The proportion of Ukrainian refugee respondents in government-supported accommodation rose from 47% to 64% between October 2022 and April 2024. With the reduced financial burden of renting while settling in the country, refugee respondents in Germany reported higher incomes and were half as likely to use livelihood coping mechanisms than in other European countries. This might reflect Germany's continuous housing support for refugees and show steady progress towards sustainable solutions.

2 **LESS VULNERABLE RESPONDENTS WERE MORE LIKELY TO SWITCH TO SELF-SUPPORTED HOUSING AND SHOW LESS DESIRE TO RETURN TO UKRAINE:** Surveyed individuals who rented self-sufficiently (14%) had fewer vulnerabilities, such as lower proportions of single caregivers (17% vs. 28% on average) and households with disabilities (15% vs. 19%). They were more likely to be employed (67% vs. 27%) and had higher median incomes per person (750 EUR vs. 460 EUR) — indicating that they rent by choice rather than necessity. Finding some sustainability, fewer of them wanted to return to Ukraine (55% vs. 60% on average and 69% in temporary housing).

3 **GERMANY'S INVESTMENT IN PREPARING UKRAINIANS FOR LABOUR MARKET BEGINS TO BEAR FRUIT AS OVER THE YEAR RESPONDENTS' LANGUAGE SKILLS WERE NOTABLY IMPROVED AND EMPLOYMENT LEVEL WAS RISING:** Having free and mandatory language courses provided by the German government requires refugees from Ukraine to spend more time on integration upon arrival (70% of working-age unemployed respondents were attending language courses as of May 2024). Even though, according to our data, this strategy initially results in lower employment figures (27%) compared to the rest of Europe (65%), it might pay off in the long-term perspective. Over the last year, participants of the longitudinal study in Germany showed a tremendous 81% increase in self-estimated 'fair' language skills (from 26% to 47%) and a 73% increase in employment level (from 15% to 26%), while other countries had much slower progress in language proficiency and employment (17% and 21% increase respectively).

4 **NEVERTHELESS, LACK OF ACCESS TO CHILDCARE AND MISMATCH OF PROFESSIONAL SKILLS ARE LIKELY TO POSE CHALLENGES ON EMPLOYMENT FACING THE NEAR FUTURE:** More than one-third (38%) of unemployed respondents were single caregivers, with some reporting childcare access issues. Furthermore, 35% of pre-school-age children did not attend any childcare facilities, leaving parents, especially single caregivers, without necessary support for labour market integration. Among the employed, the issue of qualification mismatch was pertinent, with 35% of employed respondents in Germany working in elementary jobs, while only 6% performed such a type of job pre-displacement. Many adult refugees are still attending language and integration courses (59%); post-completion, they will need additional employment support to find decent work in line with their skills and high level of previous qualifications.

5 **SURVEYED HOUSEHOLDS WITH DISABILITIES IN GERMANY REPORTED A BETTER LIVELIHOOD SITUATION COMPARED TO OTHER EUROPEAN COUNTRIES:** Unlike in other surveyed European countries, in Germany surveyed households with people with disabilities had equal to average median income per person and only 4 percentage points more people expressed unmet urgent needs compared to the overall country sample. Those surveyed households were also more frequently observed among people who ended up in government-supported housing (21%) rather than among those who were stuck in temporary/solidarity housing for 1.5 years (12%). This may indicate a greater government emphasis on supporting certain vulnerable groups.

6 **MORE THAN HALF (54%) OF RESPONDENTS' CHILDREN WERE ATTENDING BOTH GERMAN AND UKRAINIAN SCHOOLS SIMULTANEOUSLY:** They usually study the Ukrainian secondary school programme remotely alongside attending German schools, which creates a significant load for the children. These practices might indicate that parents are still uncertain about the future in Germany and want their children to obtain a Ukrainian secondary school certificate or they are willing for a younger generation to maintain cultural connections with their home country.

ABOUT THIS SITUATION OVERVIEW

As of May 2024, Germany is the leading receiver of Ukrainian refugees, with around 1.16 million Ukrainians fleeing there since 2022.[1] Ukrainians constitute a significant part of the refugee population in Germany (2.5 million), which is the third-largest refugee-hosting country worldwide.[2] The European Union's activation of the 'Temporary Protection Directive' (2001/55/EC)[3] in response to the full-scale invasion has significantly shaped the approach to refugee policies, making life in any EU country accessible for those who fled from Ukraine. Nevertheless, Germany's policies as a host country for Ukrainian refugees are distinctive, with extensive social support and integration measures not necessarily present to such extent in other European countries. As of June 2022, Ukrainian refugees in Germany became eligible for basic social benefits under the same conditions as German citizens by the Code of Social Law II (Sozialgesetzbuch II),[4] leading to higher benefit rates and integration into the support system of German employment centers, which notably includes access to state-subsidised language integration courses, accommodation support, health insurance, and other social benefits.

Using the Longitudinal Study's unique time-series data, this report aims to assess the effect of Germany's approach on livelihoods and integration of Ukrainian refugees in general. It includes a trajectory analysis of **housing arrangements** over the last 1.5 years: from cases showing a gradual transition towards self-supported housing to occasions of prolonged stay in temporary housing solutions. Further, it examines their **employment level** in view of challenges such as language barriers and job downgrades towards lower qualified positions and considers whether integrational courses play a role in improving **language proficiency** and better career paths for refugees. Since refugees from Ukraine are predominantly women with children, employment, as well as social integration in a broader sense, was also analysed through the perspective of children's attendance in schools and other educational or childcare facilities. Additionally, special attention was given to vulnerable populations particularly for socio-economic indicators as well as needs and assistance variables.

METHODOLOGY OVERVIEW

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

This report of the longitudinal survey includes three distinct sample types in the analysis. The first sample includes all respondents who participated in Round 25 of the survey (8 – 29 May 2024) and contrasts respondents in Germany (n = 690) with respondents from other European countries excluding Germany (n=2,406). It is used for the comparative analysis of the situation as of the latest round of data collection. The second sample covers the period from April 2023 to May 2024 with a cohort of respondents who participated in three distinct survey rounds: Round 12 (6 April – 1 May 2023), Round 17 (29 September – 10 October 2023), and Round 25 (8 – 29 May 2024). It includes only those people who stayed in Germany (n = 323) or those who resided in any of the other European countries (n = 1202) for the entire indicated period. This sample is used to observe how the situation changed over one year for those who were consistently present as refugees in or out of the German context. The third sample represents all those who were surveyed at least once as refugees in Germany and participated in at least two of the following rounds (n=860): Round 5, Round 12, Round 17/18, and Round 23/34. It encompasses a period of 1.5 years (October 2022 to April 2024) and tracks the housing trajectories of Ukrainian refugees upon their arrival and prolonged stay in Germany or departure back to Ukraine. A more detailed description of the methodology of trajectory analysis can be found in Annex 1.

Round 25 of the longitudinal survey has been funded by the International Federation of Red Cross and conducted in close cooperation with the Ukrainian Red Cross Society.

1. UNHCR, 'Ukraine Refugee Situation', UNHCR Operational Data Portal, May 2024
2. UNHCR, 'UNHCR Germany', 2024
3. European Union, COUNCIL IMPLEMENTING DECISION (EU) 2022/382, 2022
4. Bundesamt für Migration und Flüchtlinge, 'Die Anwendung der Richtlinie über den vorübergehenden Schutz auf Geflüchtete aus der Ukraine in Deutschland', 2024

DEMOGRAPHIC CHARACTERISTICS

As of Round 25 (May 2024), the longitudinal study sample of household members of refugees from Ukraine[5] in Germany consisted mainly of working-age[6] women (41%) and children (39%), whereas adult men accounted for 15% in total (13% for men of working age and 2% are older people[7]). When considering only working-age adults, the sex makeup constituted 76% female and 24% male household members.

2.72 average number of people in the household among Ukrainian refugee respondents in Germany

62% of all surveyed households in Germany have children in their composition

Although the average number of children per respondents' household was similar between Ukrainian households in Germany and the rest of Europe[8] (1.1), the share of households without children in Germany (38%) was 4 percentage points higher.[9] Notably, Ukrainian surveyed households with children in Germany tend to have a somewhat higher number of children than in the rest of Europe (on average, 1.74 and 1.63, respectively), which brings the overall average to a similar level. In general, according to our data, the presence of children in the households of Ukrainian refugees in the rest of Europe (66% of households include children) and returnees to Ukraine (64%) was significantly higher than in Ukraine as of 2021 (38%),[10] with refugees in Germany being no exception (62%).

Vulnerable population

19% of all surveyed households include at least 1 person with disabilities[11] (see table 1.)

30% of all surveyed households are headed by single caregivers, corresponding to **48%** of all households with children, as opposed to the situation prior to February 2022, where only 7.6%[10] of households with children were headed by a single caregiver.

6% of all surveyed household members are older people (65 and above).

1% of all surveyed households include a pregnant or breastfeeding woman.

Figure 1. Respondents' household composition of refugees from Ukraine in Germany, May 2024

(n = 1,877)

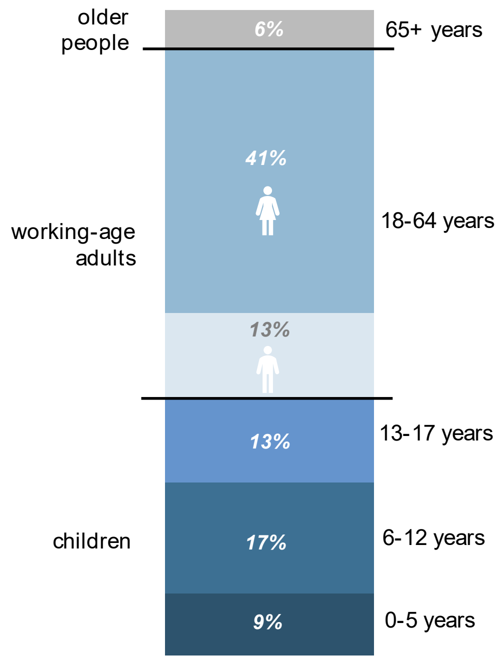


Table 1. Self-reported disability of refugee respondents from Ukraine in Germany, May 2024

Type of health-related difficulties	Share of households	Share of all HH members
Households reported any of health-related difficulties	19%	7%
Walking or climbing steps	11%	4%
Sight (even while wearing glasses)	10%	4%
Remembering or concentrating	4%	2%
Self-care (e.g., washing all over or dressing)	4%	2%
Communicating (e.g., understanding or being understood)	2%	1%
Hearing (even with a hearing aid(s))	2%	1%

5. Refugees from Ukraine are defined as everyone who left Ukraine due to the outbreak of full-scale invasion in 2022.

6. For the purposes of this situation overview, 'working age' is defined as 18-64 years old.

7. For the purposes of this situation overview, 'older people' refers to everybody of 65 years and above.

8. By 'the rest of Europe' we mean all the following countries where our respondents were residing as of Round 25: Poland, Slovakia, Czechia, Moldova, Romania, United Kingdom, Netherlands, France, Spain, Norway, Hungary, Ireland, Switzerland, Italy, Austria, Denmark, Belgium, Lithuania, Estonia, Sweden, Bulgaria, Finland, Latvia, Croatia, Greece, Luxembourg, Albania, Cyprus, Montenegro, Portugal, Iceland, Monaco.

9. In other European countries, the share of respondents' households without children stands at 23% in Romania, 31% in Poland, 36% in Moldova, 40% in Czechia, 37% in Slovakia.

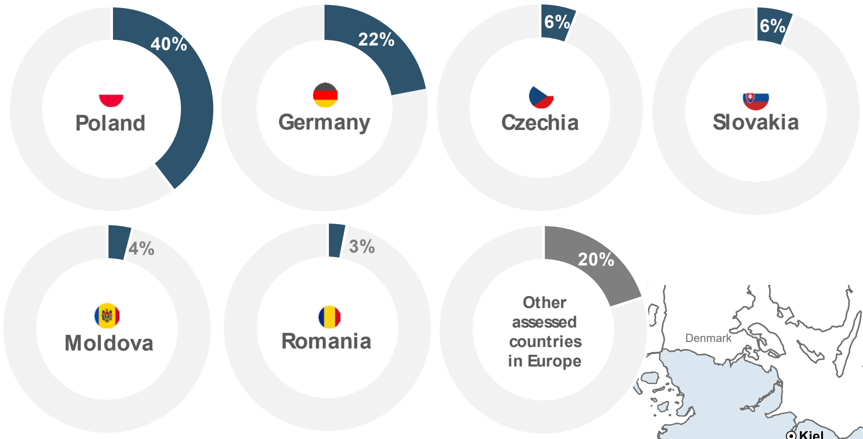
10. State Statistics Service of Ukraine, ['Social and Demographic Characteristics of Households of Ukraine'](), 2021.

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

GEOGRAPHICAL DISTRIBUTION

Figure 2. Refugee respondents distribution across host countries, May 2024

(n = 3,096)



Geographical distribution across Germany

The top four Länders[12] of stay for our respondents were: North Rhine-Westphalia (20%), Bavaria (13%), Baden-Württemberg (12%), Lower Saxony (9%) and Hesse (9%). Another 5% stayed in the capital, Berlin.[13] Additionally, according to Federal Statistical Office data, the largest proportion of Ukrainian refugees relative to Länder residents is observed in Hamburg (1.7%), Berlin (1.6%), and Mecklenburg-Vorpommern (1.5%).

Oblast[14] of origin in Ukraine

Most of the respondents in Germany, as of Round 25, fled from Kharkivska oblast (16%), Kyiv-city (15%), Donetska oblast (10%), and Odeska oblast (9%).

In general, the largest number of refugees fled from the Eastern macro-region[15] of Ukraine (43% of all respondents in Germany and 40% of all respondents in the rest of Europe) and the Southern macro-region (22% in Germany and 20% in other countries of Europe). The largest disparity is observed with refugees from the Western part of Ukraine, they comprised only 5% of all refugees in Germany against 10% of those in other European countries.

12. Länders (Bundesland) are the highest level of administrative division in Germany.

13. This distribution generally aligns with Federal Statistical Office data: Nettozuwanderung von 121 000 Menschen aus der Ukraine im Jahr 2023.

14. Oblasts are the highest level of administrative division in Ukraine.

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

SOCIO-ECONOMIC SITUATION

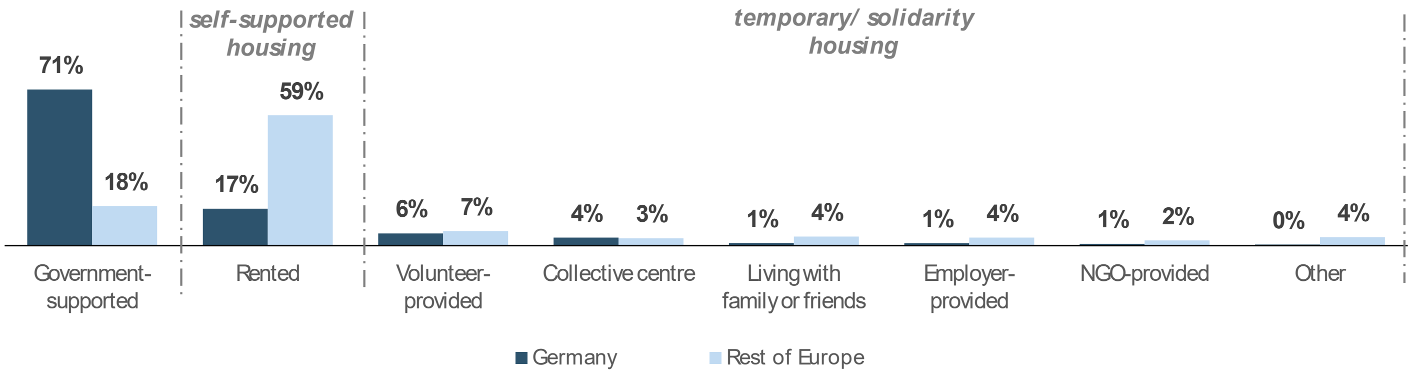
ACCOMMODATION ARRANGEMENTS AND HOUSING TRAJECTORIES OF REFUGEES IN GERMANY

Most (71%) Ukrainian refugee respondents in Germany have received continuous housing support from the state. This support has reduced the financial burden of refugees who had to rent initially their accommodation as well as mitigated housing instability risks for those living in temporary/solidarity housing after their arrival, allowing a large proportion of refugees to move to state-sponsored housing. On the other hand, in some cases, a lack of state support is likely to have influenced the respondents' decision to return to Ukraine since there is a statistically significant relation between returning to Ukraine and living in temporary/solidarity housing in Germany prior to departure.

Situation by the end of the spring 2024

The German government provides housing assistance to Ukrainian refugees who lack sufficient means to cover living expenses. Obtaining such assistance requires registration at the JobCenter[16], leading to mandatory integration and language courses. According to the longitudinal survey data, Germany provided government-supported housing to 71% of refugee households. In contrast, only 18% of the respondents living elsewhere in Europe benefitted from state support for housing. Refugees in the rest of Europe mostly rented accommodations on their own (59%), which could potentially lead to greater financial hardships and higher levels of acute unmet needs compared to those in Germany (see sections 'Needs and Assistance' and 'Income').

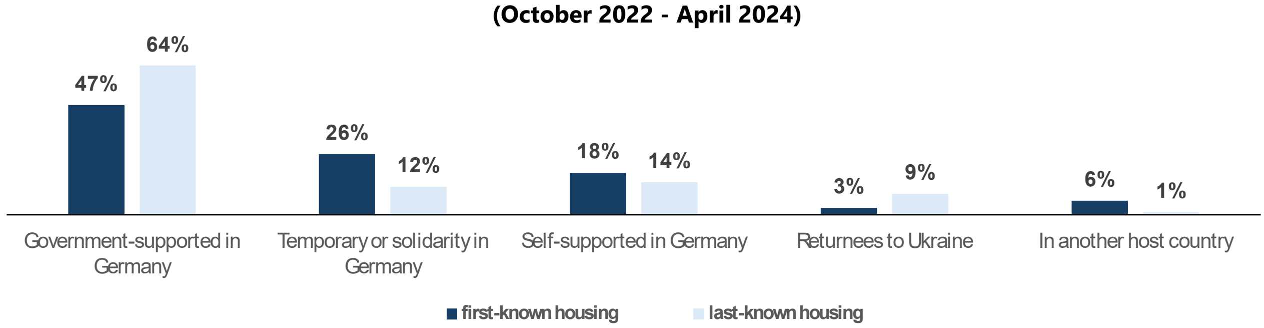
Figure 3. Type of Accommodation arrangements of respondents' households of Ukrainian refugees in Germany, May 2024



Housing dynamics over 20 months (October 2022 - April 2024)[17]

The trajectory analysis in this section considers the changes over 20 months, from October 2022 to April 2024. This covers all respondents who were refugees in Germany at any point during the assessed survey rounds (n=860), including those who returned to Ukraine or moved to other countries (the detailed methodology can be found in Annex 1).

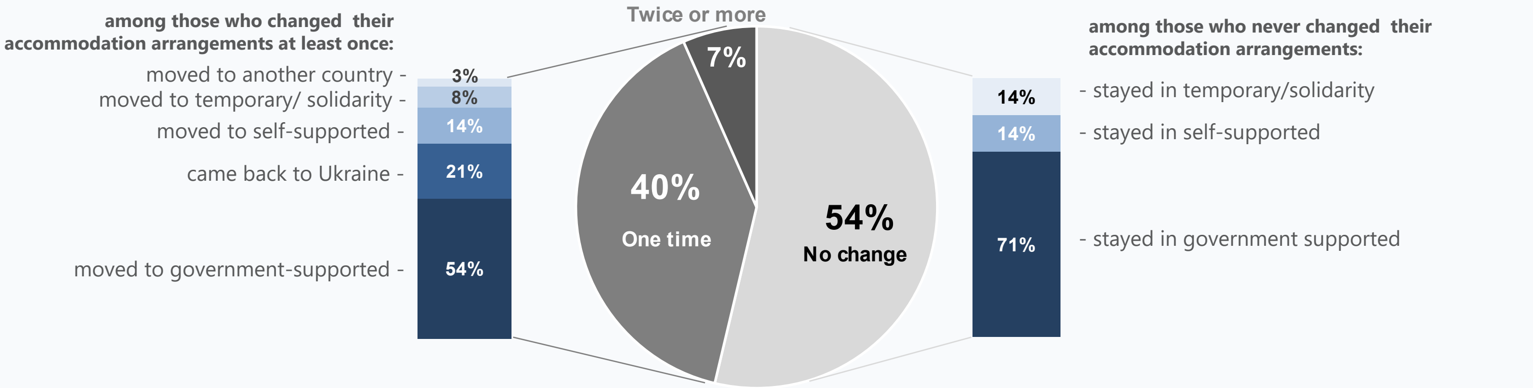
Figure 4. Accommodation arrangements of respondents in Germany, change over 1.5 year (October 2022 - April 2024)



16. The Jobcenter is a German joint institution of the Federal Employment Agency and a municipal agency responsible for providing employment and social services.

17. A detailed explanation of the methodology for calculating the proportion of housing trajectories of respondents who were displaced in Germany for at least one round as a refugee can be found in Annex 1.

Figure 5. Number of times respondents changed their accommodation arrangements during 1.5 year (from October 2022 to April 2024), breakdown by last known arrangement



Overall, among the respondents who were refugees in Germany at any time during the 20 months (October 2022 – April 2024), 54% stayed in the same housing modality for the entire time, with most of them (71%, or 39% of all respondents) living in government-supported housing. Fourty-seven per cent (47%) of the respondents moved at least once to another accommodation modality during the assessed period. The most common trajectories of relocation were for respondents who initially lived in temporary/solidarity[18] housing or self-supported[19] housing, but eventually moved to government-supported housing (11% and 8% of all respondents, respectively).

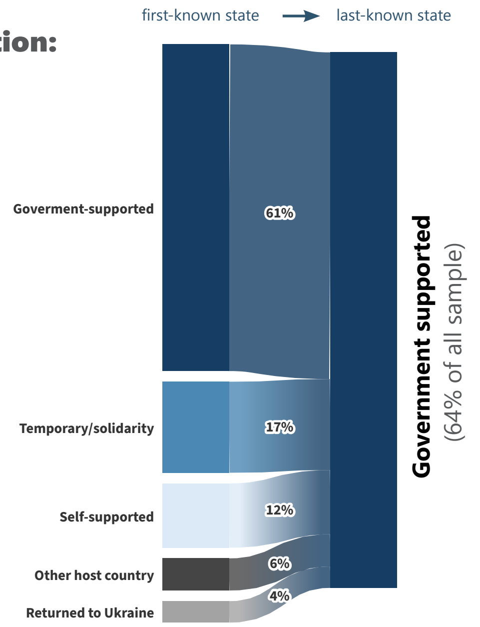
Trajectory 1.
Respondents who ended up in government-supported accommodation:

21% of their households include people with disabilities, which is the largest proportion among all trajectories, especially compared to respondents who were staying in a temporary solution for the entire observed period (12%). This discrepancy may indicate a greater government emphasis on supporting vulnerable groups.

67% have at least one child (the largest proportion among all trajectories). They are also more likely to be single caregivers (32%) compared to households living in self-supported housing (17%).

67% are attending language courses (the largest proportion among all trajectories), while 54% evaluate their language skill as poor or very poor.

87% are unemployed (the largest proportion among all trajectories).



Respondents in government-supported housing often belong to more vulnerable groups, including individuals with disabilities, single caregivers, and families with children. They are more likely to attend language courses, which may explain their higher unemployment level.

The proportion of people residing in government-supported accommodation has steadily increased over time: from 47% since October 2022 to 64% in April 2024. Of those, a majority (61%) have not changed accommodation options since the beginning of the observation period. The rest (39%) resided before either in temporary/ solidarity housing (such as collective sites, or housing provided by volunteers, family, friends, or NGOs) (17%) or rented their housing (12%). Respondents who ended up living in government-supported housing report their living conditions more favourably than other refugees: 71% rate them as good or very good, 24% as fair, and only 4% as poor or very poor. A majority of the respondents pay only a partial price for their housing (60%), whereas 39% do not have to pay at all.

18. In our study we define temporary/solidarity housing as a broad category of housing offered by individuals, organisations, or institutions for a temporary period or under specific conditions that generally do not allow for or serve as long-term accommodation solutions. This category mostly includes collective centers and housing provided by volunteers (up to 70% of those included in this category, 10% of the overall sample), complemented by a smaller share of respondents (up to 30% of those included in this category, 4% of the overall sample) living in housing provided by NGOs, friends, relatives, family, employers, or similar actors.

19. Ninety eight percent (98%) of respondents classified as living in self-supported housing reported renting (103 people), while only 2% (2 people) were homeowners. To simplify the analysis, these categories were combined into self-supported housing.

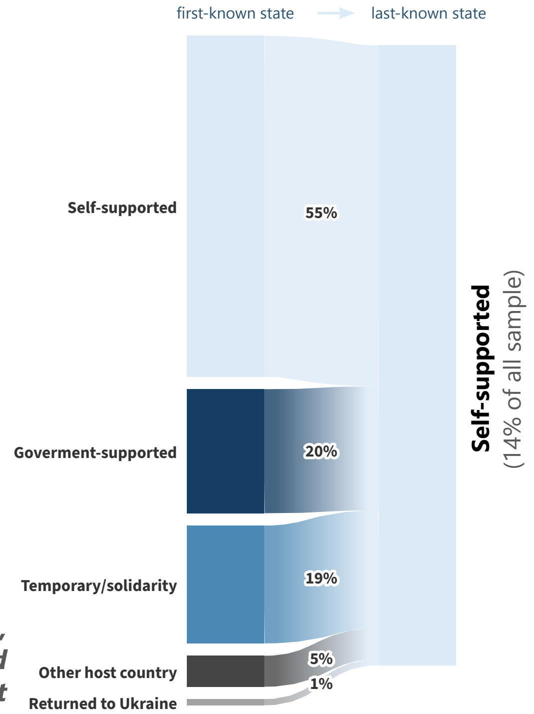
Trajectory 2.
Respondents who ended up in self-supported accommodation:

17% are single caregivers, substantially lower than the average for refugees in Germany (28%) or for respondents residing in government-supported housing (32%) and for temporary/ solidarity (33%).

15% of households include people with disabilities, a proportion that is lower than the average for refugees in Germany (19%) and for those living in government-supported housing (21%).

51% estimate their knowledge of German as poor or very poor.

67% are employed in Germany (the largest proportion among all trajectories), 36% are attending courses and out of unemployed (n =42) 21% are looking for a job.



Respondents in self-supported accommodation are generally less vulnerable, with fewer single caregivers and households with disabilities compared to other groups. They have higher income and much higher employment level, indicating those people rent by choice rather than necessity.

Some of the respondents managed to successfully transition to self-supported housing over time: 20% of those currently renting (3% of the total sample) moved from government-supported housing, and 19% (3% of the total sample) moved from temporary or volunteer housing.

The proportion of households living in self-supported housing (rented or owned accommodation) decreased from 18% in October 2022 to 14% in April 2024 (mainly due to moving to government-supported accommodation). Nevertheless, 55% never moved and were renting during the observation period. As for housing conditions, 60% of the respondents in self-supported housing rate their living conditions as good or very good, followed by 39% who rate them as fair.

The median income per person for these households is 750 EUR, which is substantially higher than in government-supported or temporary/solidarity housing (460 EUR both), with more people likely to be employed. The expressed desire to return to Ukraine at some point is linked to the housing modality as well: 55% of those living in self-supported housing say they will return, while that is the case for 69% of those living in less stable or temporary forms of accommodation (collective centres, volunteer accommodation, etc.).

As mentioned in the section below, less secure housing situations and higher levels of need may push some respondents to return to Ukraine.

Trajectory 3.
Respondents who ended up in temporary/solidarity accommodation:

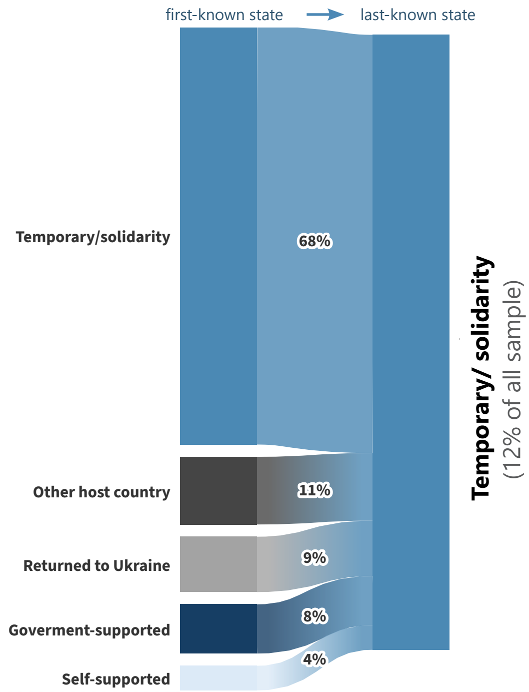
27% are 51 years and above, which is the largest proportion among all trajectories, especially compared to those currently living in self-supported housing (18%).

53% of their households have children (the lowest proportion among all trajectories, 12 percentage points lower than average). They are, though, the most likely to be single caregivers (33%), 62% of all such household with children are led by singlecaregivers.

68% never moved and were living in temporary/ solidarity housing during the entire observation period. In total, it is 8% of the overall sample, who are unable to acquire durable housing arrangements for more than 1.5 years.

62% evaluate their language skill as poor or very poor (the largest proportion among all trajectories) and 52% are attending language courses

81% are unemployed.



Respondents in temporary or solidarity accommodation are generally older, with fewer children compared to other groups. Nevertheless, those having children are the most likely to be single caregivers. Those people face significant challenges in integrating, with high unemployment level and poor language skills, and many have remained in these temporary settings for an extended period.

The share of respondents hosted in temporary or solidarity dwellings (collective sites or volunteer-provided accommodation) decreased from 26% to 12% over the considered period, indicating progress towards more sustainable housing solutions. Notably, 42% of all respondents who first lived in temporary or solidarity housing moved into government-supported accommodation. Nevertheless, a significant number of respondents were still unable to secure long-term solutions over the 1.5 year period under consideration.

Respondents in temporary/solidarity housing report the highest rates of not paying for housing: 90% in collective centres and 64% in volunteer-provided accommodations. Conditions of living, however, vary by housing type. Around one-third (35%) of those in collective sites rate their living conditions as poor or very poor, with 36% rating them as fair. Conversely, 89% of respondents hosted by volunteers report living in good or very good conditions. Further, the households living in temporary or solidarity accommodation solutions tend to have a higher level of unmet acute needs (50%) compared to those in self-provided dwellings (41%) or state-provided social housing (42%). The highest reported needs are cash (15%), accommodation (15%), and family reunification (11%), each of which is 5-9 percentage points higher than the average of the sample of all people who had been refugees at least once in Germany in the last 20 months.

Return to Ukraine and accommodation in Germany

The proportion of respondents who were displaced in Germany at least once but came back to Ukraine went up from 3% during the start of the observation period in October 2022 to 9% at the end of April 2024. 39% of them reported residing in temporary or solidarity housing during their time in Germany[20], a much higher proportion than amongst those that remained in Germany throughout (13% as of the latest round). This suggests that refugees with less secure housing modalities may be more inclined to return to Ukraine.

INCOME

In May 2024, the median income per person in refugee households in Germany was higher than in the other 5 top host countries, and the proportion of respondents resorting to coping mechanisms[21] was half that in other countries. Such data might indicate that consistent financial help in Germany alongside housing support allows a larger proportion of surveyed refugees to cover their main expenses.

Figure 6. Median income per person in respondents' households by top-6 countries, euros

(n = 823)

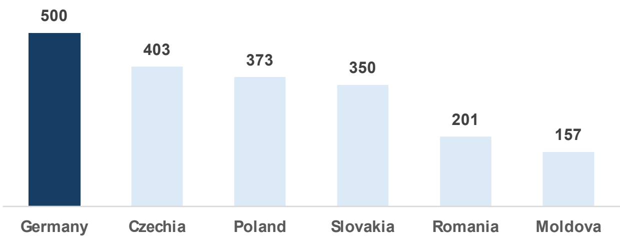
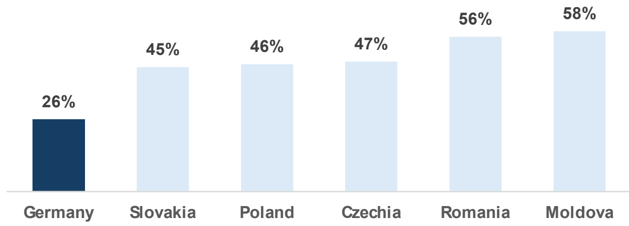


Figure 7. Use of livelihoods coping mechanisms by respondents' households, by top 6 hosting countries

(n = 2,545)



Vulnerable population

While households with people with disabilities reportedly had a similar income level to the average Ukrainian refugee household, they resorted to livelihood coping strategies in higher proportions (35%), indicating higher needs for financial support.

Median income per person and presence of livelihood coping mechanisms in surveyed households with vulnerabilities for refugees in Germany

Households which include people with disabilities
500 EUR
35% employed coping mechanisms

Single caregivers
466 EUR
28% employed coping mechanisms

Respondents aged 65 and above
500 EUR
20% employed coping mechanisms

Households with three or more children
400 EUR
28% employed coping mechanisms

20. 2.3 - standardised residual. This indicates a positive statistical relation between returning to Ukraine and living in temporary accommodation in Germany prior to this.

21. Livelihood coping mechanisms are strategies where individuals or households compromise on spending and lifestyle choices, such as cutting back on food or healthcare, to manage economic and social challenges, maintain well-being, and meet basic needs

EMPLOYMENT AND LANGUAGE PROFICIENCY

When analysing the employment situation of Ukrainian refugees in Germany, it's crucial to note the country's policies to improve language proficiency. Since June 2022, Germany has offered free language courses, which are mandatory for refugees from Ukraine registered in JobCenters. Other top-receiving countries lack such systemic efforts, pushing refugees into the labour market much quicker, though less prepared, thus the most vulnerable people are left being the least protected, facing hardships without needed support.[22] In contrast, Germany allows time for proper integration and needed social security for the most vulnerable. It may not show immediate high employment rates but already leads to increased language proficiency and housing stability. Although starting from a lower base, employment level among Ukrainian refugees in Germany are now rising much more rapidly compared to other countries.

> It is still very dangerous in Mykolaiv, but here [in Germany] we are safe. We are provided with housing, children attend school here. **Germany helps us to integrate a lot, they see how hard I and my kids are trying to learn the language and that I strive to find a job here.** Now I am waiting for B2 courses and actively looking for some part-time employment.

Iryna, 46 years old[23]

Figure 8. Employment situation among working-age (18-65) respondents as of May 2024
(n = 2,923)

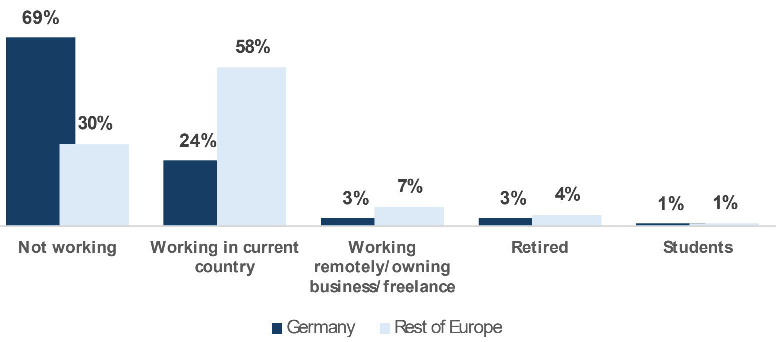
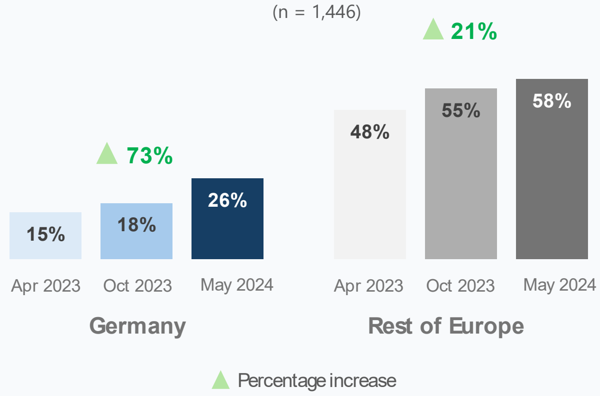


Figure 9. Share of employed working-age respondents in the host country, over 2023-2024
(n = 1,446)



> The town of Oleshky is still occupied [currently under military control of Russian Federation], there is daily shelling, it is still dangerous to return. Here, we have free housing from the state, our children are studying, **my husband and I are working, and we are to pay for our housing from May onwards**. In April we are still living under the [state-support] programme, but we will be transferred.

Anastasiia, 32 years old

22. For more information on socio-economic situation of refugees in Poland please refer to IMPACT Initiatives, "Economic integration of Ukrainians in Poland by the end of 2023: insights and challenges", 2024.

23. For confidentiality purposes, all names have been changed in this and further quotations, and the ages have been randomly selected from the respective age brackets.

The situation among employed[24] working-age refugee respondents from Ukraine living in Germany as of May 2024

64% had an income per person above the median for refugee respondents in Germany (600 EUR and more), compared to only 8% of unemployed respondents.

43% paid the full cost of rent for their accommodation, compared to 9% of unemployed respondents.

38% attended language lessons while working.

59% were assessing their German language skills as fair and above, with 12% estimating them as good or very good. The proportion was lower among unemployed respondents (45% as fair and above).

35% worked in elementary occupations. Only 6% were occupied in this sphere prior to their displacement (see Figure 10).

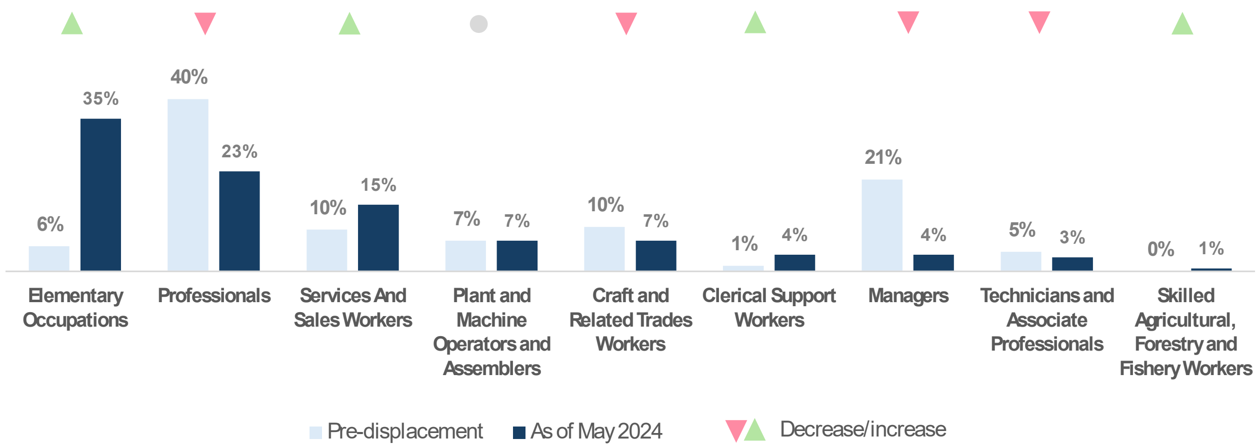
> We have no desire to return to the Russian occupation [respondent is from Kreminna, Luhanska oblast, currently under military control of Russian Federation]. Here, in Germany, we were provided with free housing, social benefits, I have already completed language courses and this month I started working, so the government stopped paying for us. **Me, my wife and my kids have already received all the help needed, now we are able to provide for ourselves**, as long as the war continues, we will definitely stay in Germany.

Fedir, 43 years old

As of May 2024, employed respondents reported above-median income per person more frequently than other subgroups and almost half of them were paying full-cost rent. Importantly, employed refugee respondents tend to assess their language skills as more proficient than unemployed, showing the importance of language proficiency for success in the labour market. Simultaneously, 38% of those employed combined their jobs with language courses and might still be supported by the JobCenter. Additionally, 35% of respondents were occupied in elementary jobs, even though only 6% of them were working in such occupations before displacement. If we consider all respondents who worked before displacement (68%), a striking 40% held positions as 'professionals', followed by 19% of 'managers', against only 3% of 'elementary' workers, highlighting the significant professional potential of Ukrainian refugees in Germany.

Figure 10. Pre-displacement and current occupation categories of employed respondents in Germany May 2024

(n = 155)



24. Here, we analyse 27% of our sample in Germany with 24% working in country and 3% occupied remotely as freelancers or business owners.

The situation among unemployed[25] working-age refugee respondents from Ukraine living in Germany as of May 2024

70% attended language courses and another 14% were actively looking for a job. Making the majority occupied with the preparation for entering the labour market.

55% were assessing their knowledge of German as poor or very poor. Yet this number has decreased over last year (see 'Language skill improvement over time') showing that language courses provide needed support.

51% had below the median income per person for refugee respondents in Germany (0-499 EUR), and 91% were paying for their accommodation partially or not paying rent at all.

Vulnerable population
18% were living in households which include people with disabilities.

38% were single caregivers (compared to 27% single caregivers among employed respondents). Additionally, 89% of all surveyed single caregivers with children aged below 6 in Germany (n = 60) were unemployed as of May 2024.

As of May 2024, most of the unemployed respondents were either attending language courses (70%) or seeking a job (14%). Their language proficiency was notably worse than those employed. There were many more single caregivers and somewhat more households which included people with disabilities. Notably, 89% of all single caregivers with children aged below 6 were unemployed, and 35% of all preschool-age[26] children did not attend kindergartens or any other childcare facilities, leaving parents and especially single caregivers without needed support for integration into the labour market.

> We are very happy in Germany. My daughter is 4 years old and attends kindergarten for free, but we had to wait a long time for a place. My mother got a mini-job and works as a cleaner in a café, we receive state financial assistance for each person. **I am taking German language courses and will have the B1-level exam in January. I plan to find a job in the future after I finish learning the language.** For safety reasons we do not return to Ukraine because of the constant missile attacks.

Sofia, 32 years old

> My hometown [Severodonetsk, Luhanska oblast] is occupied, there is nowhere to go back to, so we stay in Germany, there is housing, support from the state. Older children are in a German school; **the younger ones are at home with me because there are no available places in kindergartens.**

Olena, 40 years old

25. Here, we analyse 69% of the sample in Germany, which encompasses all unemployed, working-age (18-65 years old) respondents, excluding those who are already retired (3%) and students (1%).

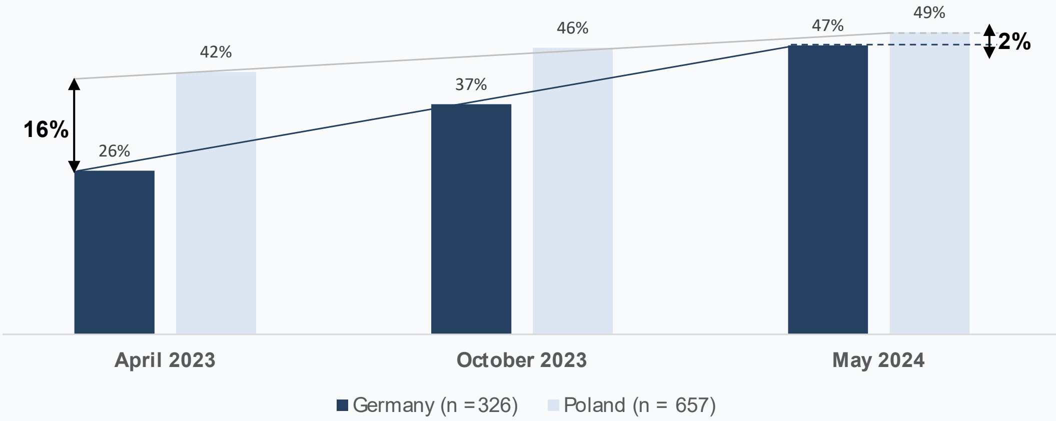
26. The questions on not attending kindergarten was asked for all 0 to 5 years old children in households.

Language skill improvement over time

Learning German is more challenging for Ukrainians than other neighbouring countries' languages such as Polish, which is linguistically closer. However, Germany is providing free state-supported language courses for refugees as part of an integration program and in preparation for the labour market. More than half (59%) of the surveyed refugees in Germany were attending language courses as of May 2024, while in Poland only 15% were doing likewise.

In order to examine how self-assessed language proficiency changed over time, the results of the same respondents who participated in each of three distinct rounds during the year were analysed (April 2023, October 2023, and May 2024). The analysis below includes respondents in Poland (linguistically close language, no widespread integrational courses) and Germany (different language family, integrational courses are widespread and obligatory for all unemployed receivers of state support).

Figure 11. Share of respondents reported having fair level of language proficiency in Germany and Poland, over time



81% - percentage increase in self-reported 'fair' language skill **in Germany**

17% - percentage increase in self-reported 'fair' language skill **in Poland**

Evidently, among people who participated in three selected rounds of Longitudinal Study over the last year, surveyed refugees in Germany showed an important 81% rise in self-assessed proficiency in the German language on a fair level (see Figure 11), 83% increase in 'good'/'very good' language skill estimation (from 6% to 11%) and a corresponding decrease in 'poor'/'very poor' level (37% decrease, from 62% to 47%). Respondents in Poland also progressed in language proficiency, though to a lesser degree: a 17% increase in fair language skills, 54% increase in 'good'/'very good' language skill estimation (from 13% to 20%) and a 31% decrease in 'poor'/'very poor' language skills (from 45% to 31%).

> I have now completed the **B1 course, it is already so much easier to organise my life in a foreign country!** I am waiting for the B2 course to start, Germany provides good opportunities for integration.

Olga, 24 years old

> The Job Centre paid for the diploma's recognition and language courses for my husband and me, and now we are waiting for the B2 courses to start. Therefore, **as of now we are not looking for a job, our qualification requires better language skills than we have.**

Viktoriia, 35 years old

EDUCATION

Integration of children in German schools as of the end of spring 2024

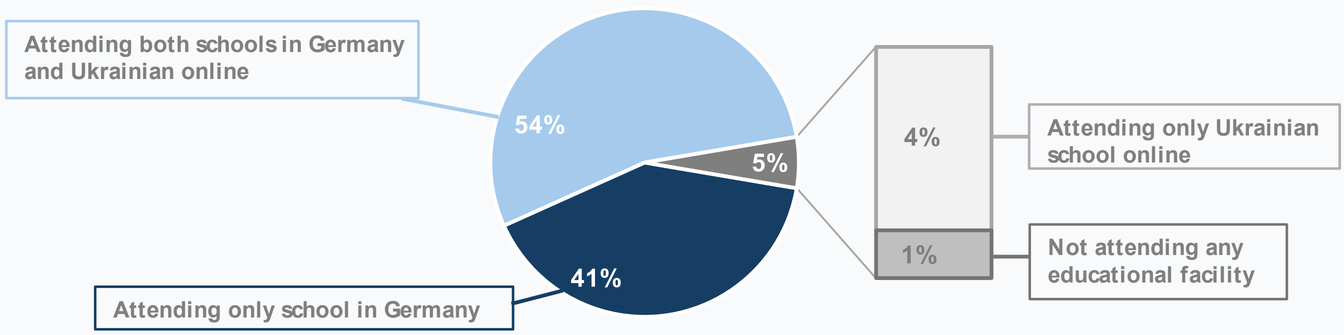
More than half of the children in surveyed refugee households in Germany were attending both Ukrainian and German schools simultaneously. The rationale behind that, highlighted by some respondents, is the wish to maintain a connection with their homeland through their children, for cultural as well as practical purposes in the event of a return to Ukraine.

> My daughter studies in both schools. We do not stop her from attending Ukrainian one because **I want her to know Ukrainian language well**.

Yuliia, 37 years old

Figure 12. Share of the school-age[27] children in surveyed refugee households attending schools in Germany and online in Ukraine

(n = 544)



Most school-age children (95%) attended German schools as of May 2024, but more than half (54%) combined it with Ukrainian schools online. Four per cent (4%) studied only in Ukrainian schools online. Interestingly, households where children study in both schools show a greater tendency for long-term aspiration to return to Ukraine compared to those where children are attending German school only (68% against 49%). Reasons that are often mentioned for children studying in Ukrainian schools are a desire to return to Ukraine or wanting children to keep learning the Ukrainian language.

Figure 13. Respondents long-term and short-term movement intentions by modality of school attendance of children in HH

(n = 3,096)

> My younger son is studying at a German school and at a Ukrainian school online, we are not leaving Ukrainian education because we plan to return to live in Ukraine in the future.

Kateryna, 41 years old

> The child is studying in a German school [only], she dropped out of the Ukrainian school, I don't see the point, we plan to stay in Germany.

Oksana, 31 years old

27. Here, we define school-age children as those between 6 and 17 years old.

NEEDS AND ASSISTANCE

As of Round 25, 43% of surveyed refugees in Germany reported having at least one unmet urgent need, 9 percentage points lower than in the rest of the European countries (52%). For both groups, the most mentioned need was cash. However, respondents residing in Germany reported it significantly less frequently than those from the rest of European countries (16 percentage point difference). The same tendency is observed in reporting needs for medical treatment or items, material assistance, and food (See Figure 14). The difference might be explained by the assistance refugees obtain depending on their host country: 86% of all surveyed refugees based in Germany reported receiving some assistance during the month before data collection, against 61% of refugee respondents settled elsewhere in Europe. The top three types of aid were: cash (79% in Germany as opposed to 47% in Europe), shelter (47% as opposed to 16%) and integration services (28% as opposed to only 7%). In both cases, authorities were the main aid providers, though to a larger proportion in Germany (97%) than in the rest of Europe (87%).

Figure 14. Unmet urgent needs of respondents in Germany and other European countries as of May 2024

(n = 3,096)

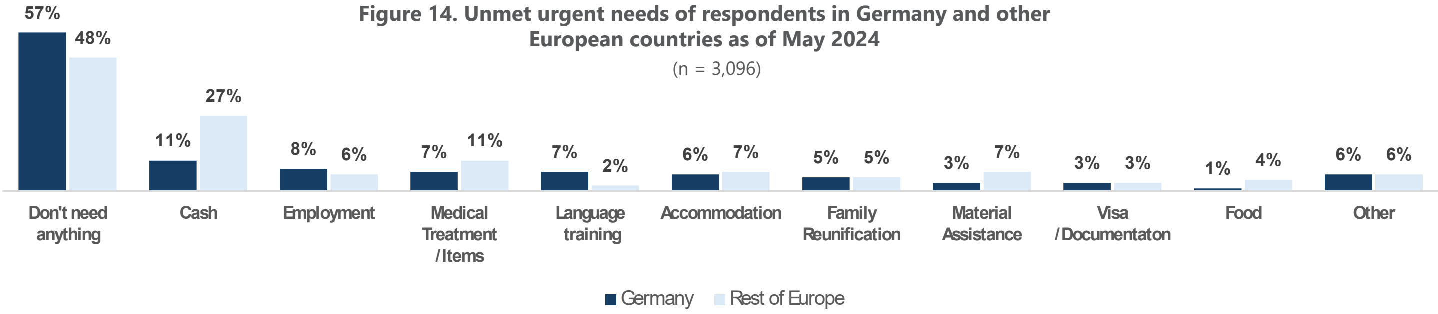


Figure 17. Unmet urgent needs, by category of vulnerability present in the surveyed household in Germany

↑↓ - higher/ lower percentage point difference between proportion of vulnerable people report unmet urgent need than on average

Single caregivers (n = 206)

8% family reunification ↑+2.4

6% employment ↓-2.3

Households which include people with disabilities (n = 133)

11% employment ↑+2.4

8% medical treatment/items ↑+1.7

3% legal advice ↑+1.7

5% language training ↓-2.5

Households with three or more children (n = 71)

17% cash ↑+5.9

6% visa/documentation ↑+2.9

10% language training ↑+2.9

5% medical treatment/items ↓-1.9

Respondents aged 65 and above (n = 40)

15% medical treatment/items ↑+8.5

3% transportation ↑+1.6

3% legal advice ↑+1.2

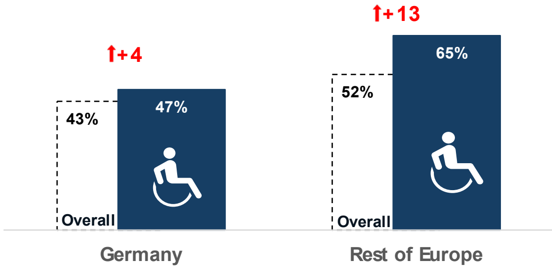
3% cash ↓-8.5

Vulnerable population

For Germany-based refugees, as well as for the rest of Europe, there are different trends in households with vulnerability presence reporting at least one unmet urgent need. In the rest of Europe, most notably, households which include people with disabilities tend to have much more unmet needs (see Figure 15).

Figure 15. Proportion of surveyed households which include people with disability reporting unmet urgent needs compared to overall sample

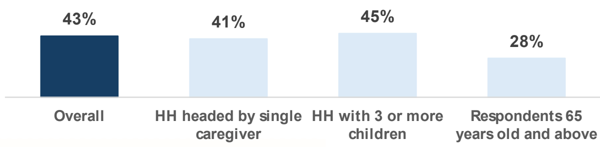
(n = 3,096)



↑,↓ - percentange point difference between overall sample and HH with disabilities

Corresponding with the level of expressed unmet urgent needs among households with vulnerabilities, according to our data, highlighted groups of vulnerable populations received more help than the overall sample (86%): single caregivers (92% received assistance), households which include people with disabilities (90%), and respondents aged 65 and above (90%). Still, for each category of vulnerability in particular, certain needs stand out as more or less pressing compared to the overall sample in Germany (see Figures 16, 17).

Figure 16. Proportion of surveyed households with other vulnerabilities reporting unmet urgent needs compared to overal in Germany



MOVEMENT INTENTIONS

Most surveyed refugees in Germany intended to remain in Germany in the next 6 months (93%), with only 6% uncertain or 1% not planning to stay at all. The same dynamic is observed in the rest of the European countries, although with fewer people indicating being certain about staying (88% of respondents in other European countries) and more people being unsure about staying (10%). The medium-term intentions did not change much from April 2023 to May 2024. Still, 60% of surveyed refugees in Germany indicated a desire to return to Ukraine at some point, 24% were not sure whether they would ever return, and 16% already decided that they would stay abroad regardless of the outcomes in Ukraine.

The proportion of respondents in Germany indicating a desire to return is steadily decreasing over time. Among those who participated in Round 12 (April 2023), Round 17 (September - October 2023) and Round 25 (May 2024) the share of people planning to return to Ukraine at some point dropped by 9 percentage points over a year, and the share of those not sure or decided not to return increased by 5 percentage points in both cases. Respondents in the rest of Europe show similar tendencies with slightly more respondents intending to return to Ukraine (66%) and less being unsure or not willing to return ever (22% and 14% respectively).

As mentioned in the previous parts of the report, the desire to ever return to Ukraine might be linked to the livelihood situation of surveyed refugees in the host country. Those stuck in temporary housing solutions were statistically more likely to return to Ukraine, while respondents who managed to maintain self-supported accommodation arrangements and found some sort of stability in Germany less frequently indicated the desire to ever return to Ukraine. The schooling modality, which children are attending might be another indicator which shows a larger or smaller likelihood of having a desire to ever return.

ANNEXES

ANNEX 1. METHODOLOGY OF THE TRAJECTORY ANALYSIS OF HOUSING ARRANGEMENTS OF REFUGEES FROM UKRAINE IN GERMANY

The method of Sequence Analysis (SA) was used to analyse the longitudinal data. SA considers sequences of states or events to encode individual life trajectories such as moving from country to country, changing housing type or gaining qualifications. For the housing arrangements trajectories analysis, four points in time were selected: Round 5 (refugee and returnee round) from September/October 2022, round 12 (refugee and returnee round) from April 2023, rounds 17 (refugee round) and 18 (returnee round) from September/October 2023, rounds 23 (refugee round) and 24 (returnee round) from March/April 2024. These points in time are both spread out in time and cover a sufficiently large number of respondents. A participant was included in the sample if they were in Germany for at least one round and if they participated in the survey for at least two or more of the assessed four rounds. Thus, the maximum analysed period encompasses 1 year and 8 months, while the minimum period is 7 months.

Missing values in the middle of a sequence (so-called 'internal gaps') were imputed using MICT - timing method from the R package TramineR - seqimpute (Emery, K., Berchtold, A., Guinchard, A., & Taher). The objective of the algorithm is to fill gaps of missing data, which is the typical form of missing data in a longitudinal setting, recursively from their edges. The MICT-timing algorithm is an extension of the MICT algorithm designed to address a key limitation of the latter: its assumption that position in the trajectory is irrelevant. Only internal gaps were imputed, because filling in terminal or initial missing values would lead to a significant increase in the number of transitions and loss of logic. Though, imputation of missing values can lead to biased estimates, the consequences of discarding incomplete data are more problematic. Modelling results show, that 126 sequences (14.7% of all 860 sequences) had internal gaps — 117 with one missing value and 9 with two. To mitigate biases that imputations of missing values could cause, the bulk of the analysis was performed on sequences consisting of two states for each participant: from the first known to the last known. This solution effectively eliminates the need to access all values in the middle of the sequence, which reduces the impact of imputed values on the results to zero. However, this means that the focus on the internal dynamics of change for participants is performed without paying attention to the possible specificities of the social context of a particular round in time.

Further, the chi-square test for contingency tables (for square tables of transition from one state to another) was used to find the patterns that should be considered when describing sequences. The chi-square criterion is based on the model of statistical dependence of the variables that form the table. The standardised residuals after fitting the independence model indicate the presence of statistically significant trends in the dependence between values of two variables.

For the contingency table 'first known accommodation' by 'last known accommodation' $\chi^2 = 311.85$, df = 16, p-value $< 8.9e-57$. Cohen's w (effect size of the strength of the relationship) is 0.62 (large). A table of standardised residuals helps to understand the nature of the relationship between variables. Large positive values greater than 1.96 (p-value $<$ 0.05) indicate that there are statistically significantly more people in the cell than expected under the condition of independence. Negative residuals less than -1.96 indicate that there are statistically significantly fewer people in the cell than expected. However, this simple analysis does not yet take into account the possible influence of third variables, such as the specific round in which the data were collected, place of residence in Germany, education, plans for stay, etc. Therefore, this simple method only allows to draw attention to interesting trends, which may have to be explained further using more complex methods of log-linear analysis of contingency tables of higher dimensionality.

ANNEX 2. TABLES OF STATE TRANSITION

Table 2.1 Transition from the first known state to the last known state and vice versa in counts of respondents.

Accommodation modalities	Last known state				
First known state	Government supported	Temporary/solidarity	Self-supported	In Ukraine	In other country
Government supported	336	8	24	32	4
Temporary/solidarity	92	68	23	31	7
Self-supported	68	4	67	15	1
In Ukraine	20	9	1	0	0
In other country	31	11	6	2	0

Table 2.2 Chi-square test and t standardised residuals for the contingency table 'first known accommodation by 'last known accommodation'.

	Statistic	d.f.	p-value
Chi-square test	311.85	16	<8.9e-57

Standardised residuals	Last known state				
First known state	Government supported	Temporary /solidarity	Self-supported	In Ukraine	In other country
Government supported	4.93	-5.69	-4.36	-0.91	-0.69
Temporary/solidarity	-4.10	8.34	-1.45	2.30	2.23
Self-supported	-3.08	-3.30	9.68	0.15	-0.79
In Ukraine	0.21	2.95	-1.57	-1.67	-0.65
In other country	-0.14	2.15	-0.39	-1.23	-0.84

ANNEX 2. ADDITIONAL TABLES FROM TRAJECTORY ANALYSIS

Table 3.1 Numbers of transition from one state to another before and after imputation of missing values

Number of transitions before imputation, all rounds		
Transitions	n	Percentages
0	462	54%
1	355	41%
2	42	5%
3	1	0%
Number of transitions after imputation, all rounds		
Transitions	n	Percentages
0	462	54%
1	341	40%
2	53	6%
3	4	0%
Number of transitions from first to last known state		
Transitions	n	Percentages
0	471	55%
1	389	45%

Table 3.2 Distribution of respondents by rounds they participated in for chosen cohort (Round 5 – Round 12 – Rounds 17/18 – Rounds 23/34) in trajectory analysis.

Number of Rounds	Round 5 (Oct 2022)	Round 12 (Apr 2023)	Round 17/18 (Oct 2023)	Round 23/24 (Apr 2024)	n	Percentage
4	1	1	1	1	143	17%
3	0	1	1	1	264	31%
3	1	0	1	1	36	4%
3	1	1	0	1	26	3%
3	1	1	1	0	36	4%
2	0	0	1	1	162	19%
2	0	1	0	1	42	5%
2	0	1	1	0	92	11%
2	1	0	0	1	9	1%
2	1	0	1	0	13	2%
2	1	1	0	0	37	4%