Country fiche

Poland

EURES Report on labour shortages and surpluses 2023

#EURESjobs
eures.europa.eu
ela.europa.eu

EUROPEAN LABOUR AUTHORITY

The present document has been produced by Fondazione Giacomo Brodolini Srl SB. This task has been carried out in the context of a contract between the European Labour Authority and the authors, awarded following a tender procedure. The document has been prepared for the European Labour Authority, however, it reflects the views of the authors only. The information contained in this report does not reflect the views or the official position of the European Labour Authority.

Table of Contents

Abbreviations

Acronym	Full title
GUS	Statistics Poland
LFS	Labour Force Survey
NCO	EURES National Coordination Office
NIL	Supreme Medical Chamber
PES	Public employment services
PKD	Polish classification of activities

1.0 Labour market imbalances

1.1 Overview

Poland is experiencing unprecedented development and economic growth, visible also in labour market indicators. In the period 2010-2022, there was a noticeable improvement in the labour market, with the greatest positive changes taking place in the years 2015-2019 (Statistics Poland, 2023a). According to Statistics Poland (GUS), the registered unemployment rate in October 2023 amounted to 5%, and according to the most up-to-date Eurostat data, based on LFS methodology, it was one of the lowest in the EU – equal to 2.8% in October 2023 (against an EU27 average of 6%).

The key challenges in the country include an ageing population combined with relatively low levels of economic activity. According to the latest Cedefop skills forecast (2023), the population aged 20-44 and 60-64 in Poland is forecasted to decline quite strongly during 2020-2035, while the population aged 45-59 and 65 and over is forecasted to grow quite strongly, reflecting trends in the relevant younger cohorts in preceding periods. The results of the LFS indicate that in the last quarter of 2022, the population of economically active persons aged 18-59/64[1] is 80.2% of this population. This consisted of 97% of employed persons and 3% of unemployed individuals (Statistics Poland, 2023a). Economically inactive persons in this age group at the end of 2022 were 19.8%. Inactivity is usually linked to participation in education and training, illness or disability, family responsibilities, and early retirement.

The number of employed people in the national economy as of 31 December 2022 was 15 209 700. This included 1 276 500 employed in the agricultural sector, 4 296 100 in the industrial sector, and 9 596 400 in the service sector, which means that employment was characterised by the dominance of services (Statistics Poland, 2023b). According to the LFS survey in Poland, the number of underemployed persons (working part-time who would like to work more hours per week and would be ready to work in this capacity) amounted to 131 000.

The Polish EURES National Coordination Office (NCO) reported 28 shortage occupations and no surplus occupations. Shortage occupations are listed in Annex 1 and include professionals in the health sector (e.g. specialist medical practitioners, and nursing professionals), craft and elementary occupations in the construction sector (e.g. house builders and building construction labourers), technical occupations (e.g. accounting associate professionals), and clerical and support occupations (accounting and bookkeeping clerks).

As of early 2024, the Central Database of Job Offers of Public Employment Services in Poland[2] lists 16 106 job offers covering 56 426 vacancies (as one job offer can include several vacancies at the same position). At the same time, according to Grant Thornton (2023) – which monitors the number of open market vacancies monthly - in October 2023, employers published 256 500 job offers on the 50 largest recruitment portals in Poland. Therefore, the list of shortage occupations based on PES administrative data

1 - There are two retirement ages in Poland: 60 for women and 65 for men. Statistics of economically active persons accordingly includes two different reference groups for men and women.

2 - https://oferty.praca.gov.pl/portal/index.cbop#/listaOfert

might not fully reflect the recruitment difficulties experienced by employers in Poland. For example, the NCO did not report any ICT-related occupations, while these are listed as critical occupations by other national data sources.[3] According to Manpower Group (2022), the top five in-demand roles which also experience difficulties in recruitment in Poland include IT, operations and logistics, customer facing and front office, HR, and sales and marketing.

While comparing these results with other available national data sources and studies, it should be kept in mind that analysis of labour market imbalances in the Polish labour market is difficult due to the lack of a comprehensive system of labour market analysis and forecasting. Sources of information are dispersed and not integrated, making it challenging to draw binding conclusions.

The main source of labour market imbalances analysis in Poland available at national and regional levels is an Occupational Barometer (*Barometr Zawodów*), prepared by the public employment service based on expert-led forecasting methodology. While it offers important insights into shortage and surplus occupations,[4] the methodology has numerous disadvantages. Participants in the expert panels are mainly employees of employment offices, and the conclusions about the labour market are based on job offers reported to PES and registered unemployed, while little account is taken of the rest of the labour market (Rogowski, 2022).

The findings from the Occupational Barometer are broadly in line with data collected in the EURES report. In 2022, 30 occupations were in shortage in Poland. In line with findings in the 2023 EURES report, most labour shortages occurred at different levels in the construction industry (i.e., concrete and reinforcement workers, pavers, carpenters, roofers and sheet metal workers, fitters of building installations, bricklayers and plasterers, operators and mechanics of earthworks equipment, finishing workers in construction, construction workers) and in medical and care industries (i.e., physiotherapists and masseurs, doctors, caregivers for the elderly or people with disabilities, nurses and midwives, paramedics, psychologists, and psychotherapists).

Medical and nursing labour shortages in Poland – as anywhere in Europe - are particularly significant because as the population ages the demand for medical services increases. Data show a discrepancy between the total number of members of medical chambers and the number of doctors and dentists practising the profession. This means that a significant number of doctors have been deprived of the right to practice, have renounced this right or have not practised their profession for a long period of time. In the years 2008-2020, the percentage of doctors authorised to practice aged 65 and over in relation to the total number of doctors increased (from 18.7% to 25.1%). This means that more and more doctors near retirement age work in the healthcare system.

Other shortage occupations identified in the Barometer (2022) are in the manufacturing industry (i.e., electricians, electromechanics and electrical fitters, cutting machine operators, woodworking workers and carpenters, welders, locksmiths), transport industry (i.e., bus drivers, truck and tractor unit drivers, warehouse workers, motor vehicle mechanics), financial industry (i.e., independent accountants, accounting and bookkeeping employees), educational industry (i.e., teachers of practical vocational training, teachers of vocational subjects), and food and catering industry (i.e., chefs, bakers).

Another source of information on labour market imbalances in Poland is the study by Statistics Poland (2021) on the labour demand by occupations. The study presents the results of the first edition conducted in 2021, which will be examined periodically every three years using the representative method in units employing at least one person. Among the sub-major occupational groups, the most sought-after were industrial workers, craftsmen and professionals. Industrial workers and craftsmen were sought primarily in construction, where employees in this group of professions constituted over 2/3 of the people sought in this sector in the first quarter. A large part of the employees sought in the industrial processing sector were also industrial workers and craftsmen. In turn, professionals (including economic and management, health, technica,l and other professionals) were sought mainly in the following sectors: healthcare and social assistance; information and communication professionals, scientific, and technical activities. In each of these sectors, the share of professionals among the sought-after employees reached up to 3/4. Professionals constituted more than half of the employees sought also in the education sector; professional, scientific, and technical activities as well as financial and insurance activities.

3 - It should be noted that analyses of shortage occupations prepared based on public employment services data – such as the one used to complete the current report - might pose challenges in identifying jobs requiring higher levels of skills or qualifications. As employers are not obliged by law to report vacancies to PES, PES do not take account of those occupations that usually are advertised on the open labour market (e.g. IT specialists, engineering, service professionals, managers, etc.), and especially include low- to medium-skilled jobs.

4 - It should be noted that in the previous editions of the Barometer (2017-2021) only economists have been considered a surplus occupation. In the years 2022-2024 no surplus occupations have been identified.

Evidence in Poland also suggests a high degree of convergence of labour shortages,[5] although regional disparities emerge from national data sources. According to Statistics Poland data, labour shortages occur primarily in dynamically developing regions, mainly in large urban agglomerations. For example, in 2022, 534 800 new jobs were created in Poland, with newly created jobs mainly in the Mazowieckie Voivodeship (126 300) – a more developed region by cohesion policy standards[6] which employs 5.2% of all the employed persons in the country (2 437 300 in 2022) - and the fewest new jobs were created in the Opolskie Voivodeship (8 200) – a less developed region constituting 2.36% of all employed in the region (346 700 in 2022). Also, the distribution of vacancies was uneven across the regions – in 2022 out of 139 800 vacancies, the largest number was in the Mazowieckie Voivodeship (36 700) and the Wielkopolskie and Śląskie Voivodeships (14 900 and 14 800 respectively), and the smallest in the Świętokrzyskie Voivodeship (2 000).[7] At the end of 2023Q3, the highest vacancy rate occurred in the West Pomeranian region (1.2%). A high rate also occurred in the regions of Warszawa (1.1%) and Lubuskie (1.2%). The lowest job vacancy rate was recorded in the Lublin region (0.4%) (Statistics Poland, 2023c).

1.2 Expected future developments

Cedefop (2023) skills forecast also confirms that hiring difficulties are mostly expected among the highly qualified. It is forecasted that professionals and technicians and associate professionals will see the largest increase in jobs and largest replacement demand, and so both are expected to provide the most job openings over 2020-2035. Most job openings (taking both new/lost jobs and replacement needs together) are expected to be in highly skilled occupations such as health professionals, business and administration professionals and associate professionals, science and engineering professionals and associate professionals and teaching professionals. Some skilled manual occupations such as building and related trades workers, drivers and mobile plant operators and metal, machinery and related trades workers are expected to provide many job openings. Some skilled non-manual occupations, such as personal service workers and sales workers, are also expected to provide a substantial number of job openings. Due to the green transition, there will be a decrease in demand for occupations related to mining and oil processing, and an increase in those related to the circular economy, for example, sustainability analysts, who will be needed in many industries (Konfederacja Lewiatan, 2021).

In the project 'System for Polish Labour Market Prognosis' *(System prognozowania polskiego rynku pracy*) methods of forecasting labour demand, labour supply and the demand-supply gap, along with the new tool for forecasting the labour market in the 2050 horizon have been developed. However, the prognosis is only available for major and sub-major occupational groups and does not offer insights at the level of the individual professions.

Additionally, the Minister of Education and Science prepares a 'Forecast of demand for employees in vocational training professions' (*Prognoza zapotrzebowania na pracowników w zawodach szkolnictwa branżowego*). According to the study, 34 professions will attract special demand, many in the construction, automation, and transport sectors. Four professions appeared on the national list for the first time: machine and equipment operator in waste management, waste management technician, industrial insulation fitter, and industrial insulation technician.

With the increasing pace and importance of the twin transitions, a need for the further development of the forecasting abilities has been noted by the Ministry of Family and Social Policy, which has planned to implement a project co-financed by the European Social Fund+ for 2021-2027 (ESF+) to launch a system for strategic forecasting of the demand for digital and green skills in a multi-annual perspective. The data obtained from the aforementioned system will be used to formulate directions for skill development in Poland (Ministry of Family and Social Policy, 2023).

5 - Qualitative, ad-hoc requests to the NCO.
6 - https://ec.europa.eu/regional_policy/policy/how/is-my-region-covered_en
7 - The numbers constitute 1.5% of all employed persons in Mazowieckie voivodeship, 0.97% in Wielkopolskie, 0.87% in Śląskie and 0.46% in Świętokrzyskie.

2.0 The construction sector

The construction sector is one of the driving forces of the entire economy and, according to Statistics Poland (2022) employed 7% of the total employed population in 2022. In recent years, the sector experienced increasing growth levels, especially following a sharp increase in public investments and the support of EU funds (Pleskacz, Marcysiak, 2021). The demand for services has increased, resulting in an increasing demand for employees at all levels, causing recruitment difficulties (ASM, 2019). Recently, the limited supply of qualified labour and dynamically rising wages are the most discussed issues in the sector, as the availability of qualified staff slowly decreases (BGK, 2020).

One of the most comprehensive sources of information on the construction sector is the report from Sectoral Human Capital Balance – construction industry (BKL, 2021). It provides insights into the current and future demand for competences and qualifications in the sector, based on opinions obtained from a wide range of stakeholders. According to the study, the main challenge that the industry will face in the next five years is staff ageing which will limit the number of available employees and may hamper the development of companies. These gaps will not be systematically filled by the young generation of employees due to their low interest in a career in the sector, given the physical work, low salaries compared to their expectations, and the declining prestige of a career in the construction industry. The reduction in the number of construction vocational and technical schools after 1989 led to the creation of a generation gap that is difficult to fill, and the redesign of vocational education is becoming more and more difficult due to the shortage of vocational training teachers in the field of construction.

It is important to note that the construction industry in Poland might suffer shortages due to the increased movement of workers to other Member States of the European Union. According to De Wispelaere et. al. (2023), Poland and Germany are the main Member States supplying migrant workers. Construction and road freight transfers are the two sectors most heavily impacted by this phenomenon. The resulting gap is partially filled by employees from Eastern European countries (Ukraine, Belarus), but also from Asian countries (including India, Bangladesh, and China). The majority of foreigners from third countries in Poland work based on the so-called 'Declaration of entrusting work to a foreigner', which entitles them to perform non-seasonal work for up to six months during consecutive 12 months. A prerequisite for performing work within the simplified procedure is the entry of the declaration of entrusting work to a foreigner to the declarations register by the Poviat Labour Office and holding a document confirming their residence title in Poland. This procedure is solely aimed at the nationals of Armenia, Belarus, Georgia, Moldova, Russia and Ukraine. Still, emerging shortages are not fully offset by the employment of third country nationals.

Experts do not predict radical changes in the employment structure in the industry, apart from staff shortages. In the next 12 months, an increase in the demand for skilled workers is expected but there will be difficulties in recruiting skilled workers in positions such as building structure fitter, sanitary installations and equipment fitter, construction and finishing works fitter, building demolition worker, bricklayer-plasterer, concrete worker-reinforcer, carpenter. Labour demand for middle and higher-level positions in the next five years is also expected to increase and so will the recruiting difficulties (foremost for engineers and architects). Additionally, employers expect the share of new positions in the industry to increase (e.g. 3D visualisation designer, Building Information Modelling engineer, environmental protection specialist). Members of the Sectoral Council for Competences in Construction indicate that the coming years will be ground-breaking for the qualifications, competencies and skills of employees in the construction sector due to the development of sustainable construction, energy efficiency of buildings and integration of digital technologies in the construction process (Symela, Woźniak, 2020). These new requirements must be taken into account in the future-looking analysis of labour market (and skills) imbalances.

In the five-year perspective, employers are optimistic, as 62% of them believe that employment in their companies will not change. A decrease in employment is expected by 6% of surveyed employers (mostly in small companies - 8%), while 14% of employers expect an increase in employment (23% in the group of medium-sized companies) (BKL, 2021). However, other forecasts for the construction sector are not so optimistic (PwC, 2023). This applies to both economic forecasts for the industry, as well as labour market forecasts. From this perspective, the key factor is still strong (although decreasing) wage pressure caused by high inflation and the short supply of employees in key positions.

3.0 Conclusions

The analysis of labour market imbalances in Poland reveals a complex landscape characterised by both significant achievements and persistent challenges. As Poland experiences notable economic growth and development, it struggles with structural issues in its labour market. These challenges have been exacerbated by population ageing and relatively low birth rates, leading to concerns about future labour supply. Additionally, certain groups such as women, older workers, and people with disabilities face barriers to employment, contributing to persistent levels of unemployment and underemployment.

Addressing key mismatches in occupations and skills is crucial for tackling labour market imbalances in Poland, as it poses particular challenges to economic growth and development. Labour shortages characterise the healthcare sector in professions essential for meeting the increasing demand for medical services due to population ageing. Additionally, technical occupations in industries like construction and manufacturing, such as electricians, welders, and machine operators, are in high demand but face shortages of qualified workers. Moreover, the emergence of new technologies and industries, such as IT and environmental protection, has created a demand for skills that are currently in insufficient supply. Addressing these mismatches requires targeted interventions, including investment in education and training programmes, improving the alignment of education with labour market needs, and facilitating transitions for workers to acquire new skills. By focusing on key mismatch occupations, policymakers and stakeholders can address critical gaps in the labour market and promote sustainable economic growth.

Looking ahead, population ageing and low economic activity levels are anticipated to continue posing significant challenges for Poland's labour market. The demand for skilled workers, particularly in highly qualified occupations such as healthcare, engineering, and IT, is expected to increase, further highlighting the importance of addressing skills mismatches and fostering lifelong learning opportunities. Several initiatives in the area of labour market forecasting demonstrate a commitment to addressing future labour market needs. However, there is a recognised need for more comprehensive and integrated approaches to labour market analysis and forecasting to effectively tackle these challenges and ensure sustainable economic growth and social cohesion.

In the construction sector, there are growing concerns about the limited supply of qualified labour and rising wages. The sector faces challenges related to staff shortages, skills mismatches, and an ageing workforce. Efforts to address these challenges include initiatives to attract and train workers, such as vocational training programmes and the employment of third country nationals. However, there is a recognition of the need to modernise vocational education and adapt to emerging trends such as sustainable construction and digitalisation. Moving forward, a coordinated and multi-stakeholder approach will be essential to ensure the long-term sustainability and competitiveness of the construction sector in Poland.

References

ASM Centrum Badań i Analiz Rynku (2019), Praca w Budownictwie. Raport specjalny. https://inzynierbudownictwa.pl/praca-w-budownictwie-raport-specjalny

BGK (2020), Raport z badania sektora budowlanego, https://www.bgk.pl/files/public/Pliki/dla_mediow/Raport_z_badania_sektora_budowlanego.pdf

BKL (2021), Branżowy Bilans Kapitału Ludzkiego – branża budowlana. Raport podsumowujący I edycję badań realizowanych w latach 2020-2021, https://www.parp.gov.pl/storage/publications/pdf/PARP-4-Raport-branza-bud_alternatywne-14-06-2021_akcept.pdf

CEDEFOP (2016), Priority mismatch occupations – Poland https://www.cedefop.europa.eu/en/data-insights/poland-mismatch-priority-occupations

CEDEFOP (2023), Skills forecast Poland. Country Fiche. https://www.cedefop.europa.eu/files/skills_forecast_2023_poland.pdf

Central Database of Job Offers of Public Employment Services in Poland https://oferty.praca.gov.pl/portal/index.cbop#/listaOfert

De Wispelaere, F., De Smedt L., Pacolet, J. (2023), Posting of workers. Collection of data from the prior declaration tools. Reference year 2020, Luxembourg: Publications Office of the European Union, https://ec.europa.eu/social/BlobServlet?docId=26661&langId=en

Grant Thornton (2023), Oferty pracy w Polsce (październik 2023, XLII edycja) https://grantthornton.pl/wp-content/uploads/2023/11/Oferty-pracy-w-Polsce-pazdziernik-2023.pdf

Konfederacja Lewiatan (2021), Prognozowane zmiany na rynku pracy wywołane transformacją energetyczną. https://lewiatan.org/wp-content/uploads/2022/01/rynek_pracy_transformacja_10122021.pdf

ManpowerGroup (2022), Poland's 2022 Talent Shortage https://go.manpowergroup.com/hubfs/Talent%20Shortage%202022/MPG_2022_TS_Infographic-Poland.pdf

Ministry of Education and Science (2023), Forecast of demand for employees in vocational training professions on the national and regional labour market (Prognoza zapotrzebowania na pracowników w zawodach szkolnictwa branżowego) https://www.gov.pl/web/edukacja-i-nauka/prognoza-zapotrzebowania-na-pracownikow-w-zawodach-szkolnictwa-branzowego

Ministry of Family and Social Policy (2023), National Action Plan for Employment for 2023, https://psz.praca.gov.pl/documents/10240/196085/National_Action_Plan_for_Employment_2023.pdf/5d405dbc-9ada-4728-a789-091172845b19?t=1693570555915

Ministry of Family and Social Policy, *Occupational Barometer* (Barometr Zawodów) https://barometrzawodow.pl/

Pleskacz Ż., Marcysiak A. (2021), Wpływ pandemii na rynek pracy przedsiębiorstw branży budowlanej, w: Rynek pracy wobec wyzwań przyszłości – ujęcie interdyscyplinarne, Akademia Bialska im. Jana Pawła II.

PwC (2023), W oczekiwaniu na lepsze czasy, Prognozy dla branży budowlanej, (Waiting for better times. Forecasts for construction sector) https://www.pwc.pl/pl/artykuly/w-oczekiwaniu-na-lepsze-czasy-prognozy-dla-branzy-budowlanej.html

Rogowski R. (2022), *Limitations of the occupational barometer in diagnosing the labor market*, Social Policy No. 11–12 https://polityka-spoleczna.ipiss.com.pl/resources/html/article/details?id=233676&language=en

Statistics Poland (2021), Zapotrzebowanie rynku pracy na pracowników według zawodów w 2021 r. https://stat.gov.pl/download/gfx/portalinformacyjny/pl/defaultaktualnosci/5474/24/1/1/zapotrzebowanie_rynku_pracy_na_pracownikow_wedlug_zawodow_w_2021_r.pdf

Statistics Poland (2022), Pracujący w gospodarce narodowej, https://stat.gov.pl/obszary-tematyczne/rynek-pracy/pracujacy-zatrudnieni-wynagrodzenia-koszty-pracy/pracujacy-w-gospodarce-narodowej-w-2022-roku,7,20.html

Statistics Poland (2023a), Selected aspects of the labour market in Poland, Warsaw. https://stat.gov.pl/download/gfx/portalinformacyjny/pl/defaultaktualnosci/5818/4/3/1/wybrane_aspekty_rynku_pracy_w_polsce_.pdf

Statistics Poland (2023b), Employment in the national economy in 2022, Statistical Office in Bydgoszcz, Centre for Labour Market Surveys and Analyses. https://stat.gov.pl/download/gfx/portalinformacyjny/en/defaultaktualnosci/3292/7/19/1/informacja_statystyczna_pracujacy_w_gospodarce_narodowej_w_2022_r.pdf

Statistics Poland (2023c). Human capital in Poland in the years 2018–2022, Warszawa-Gdańsk. https://stat.gov.pl/download/gfx/portalinformacyjny/pl/defaultaktualnosci/5501/8/9/1/kapital_ludzki_w_polsce_w_latach_2018-2022.pdf

Symela K., Woźniak I. (2020), Rekomendacja dotycząca szczególnie potrzebnych kwalifikacji rynkowych w budownictwie, w tym inteligentnych specjalizacji, wymagających opisów zgodnych ze Zintegrowanym Systemem Kwalifikacji (ZSK), Sektorowa Rada ds. Kompetencji w Budownictwie, Warszawa.

System for Polish labour market prognosis (System prognozowania polskiego rynku pracy) https://prognozy.praca.gov.pl/login

Annex: List of labour market imbalances (Poland)

ISCO code	Shortage	Type of shortage
4311	Accounting and bookkeeping clerks	Skills
3313	Accounting associate professionals	Skills
8219	Assemblers not elsewhere classified	Skills
7411	Building and related electricians	Skills
9313	Building construction labourers	Skills
8331	Bus and tram drivers	Labour
7115	Carpenters and joiners	Skills
5120	Cooks	Labour
8342	Earthmoving and related plant operators	Labour
8332	Heavy truck and lorry drivers	Labour
7111	House builders	Labour
7223	Metal working machine tool setters and operators	Skills
7231	Motor vehicle mechanics and repairers	Skills
2221	Nursing professionals	Labour
2264	Physiotherapists	Skills
7123	Plasterers	Labour
2341	Primary school teachers	Labour
2634	Psychologists	Labour
7121	Roofers	Skills
2330	Secondary education teachers	Labour
3412	Social work associate professionals	Labour
2352	Special needs teachers	Skills
2212	Specialist medical practitioners	Labour
4321	Stock clerks	Skills
2359	Teaching professionals not elsewhere classified	Labour
7222	Toolmakers and related workers	Skills
2320	Vocational education teachers	Labour
7212	Welders and flame cutters	Skills

EURES

Subscribe to our newsletter

facebook.com/EURESjobs

twitter.com/EURESjob

linkedin.com/company/eures

youtube.com/user/EURESjob

instagram.com/EURESjobs

eures.europa.eu