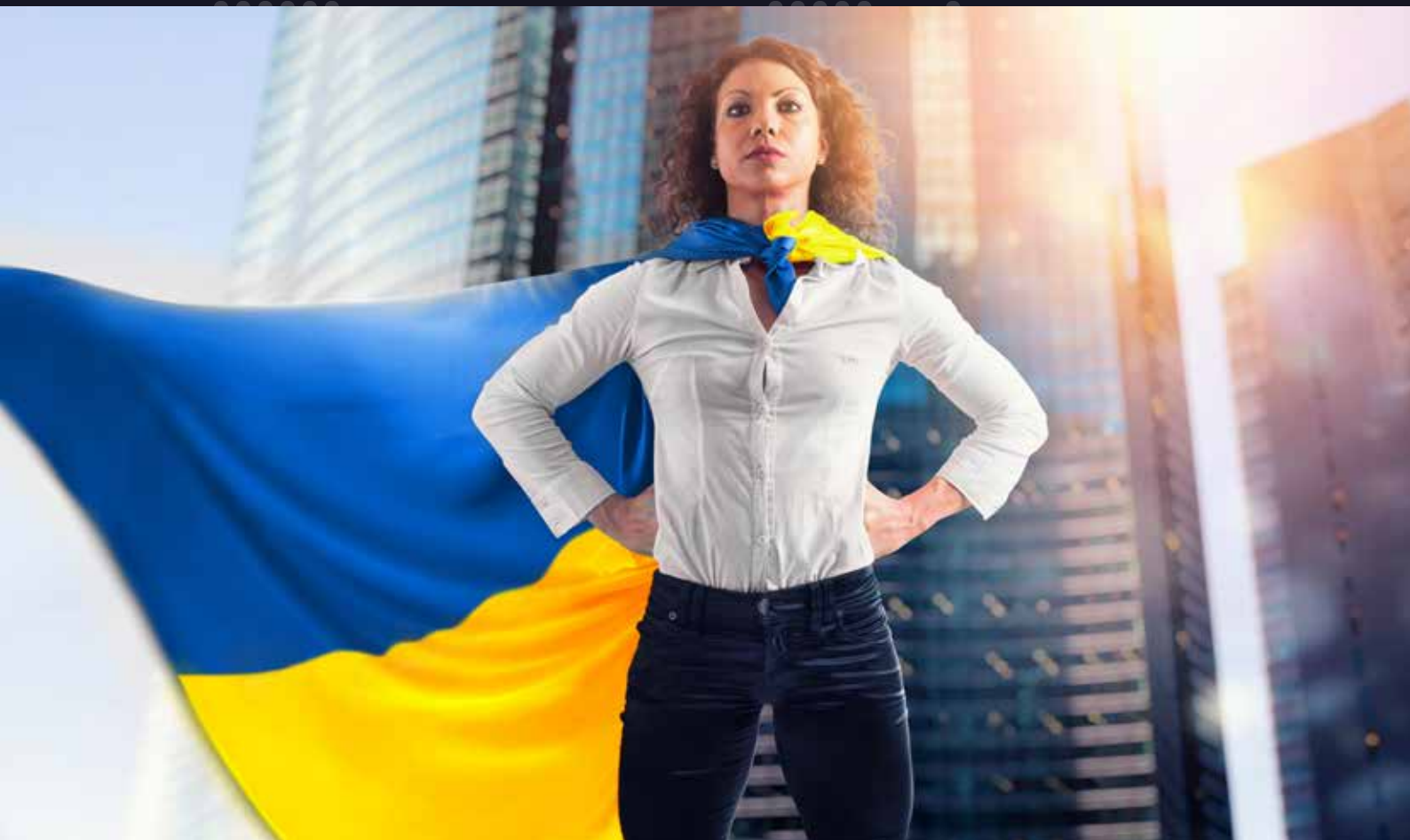


# REPORT

## UNLOCKING THE POTENTIAL

### UKRAINIAN CITIZENS IN GERMANY AND THE NETHERLANDS



This report presents findings from a sociological survey titled 'Unlocking the Potential: Ukrainian Citizens in Germany and the Netherlands'. The survey was conducted by the EWL Group in collaboration with the Foundation for the Support of Migrants on the Labour Market 'EWL' and the Centre for East European Studies at the University of Warsaw.

# TABLE OF CONTENTS

INTRODUCTION	3
KEY FIGURES	4
KEY FINDINGS	5
CURRENT SITUATION	6
RESPONDENT PROFILE	7
DESTINATION COUNTRY	8
RESPONDENT PROFILE: FAMILY	9
EDUCATION AND LANGUAGE SKILLS	10
FINANCIAL AID	11
FOREIGN EMPLOYMENT: EXPERIENCE	12
EMPLOYMENT	13
EARNINGS AND FINANCIAL SITUATION	18
AID FOR UKRAINE	19
WORKING CONDITION	20
WORK CONDITIONS AND STARTING A BUSINESS	21
INTEGRATION	22
MOTIVATIONS FOR STAYING IN GERMANY AND THE NETHERLANDS	23
EXPERT OPINION	26
TENT PARTNERSHIP FOR REFUGEES	27
METHODOLOGY	28
THE AUTHORS OF THE STUDY	29
EWL GROUP REPORTS 2014-2018	30

# INTRODUCTION



**ANDRZEJ KORKUS**

EWL Group CEO  
Chairman of the EWL  
Foundation



**JAN MALICKI, DR H.C.**

Director of the Centre  
for East European Studies  
at the University of Warsaw

The unstable geopolitical situation in Eastern Europe, triggered by Russia's invasion of Ukraine on February 24th, 2022, contributed to an unprecedented migration wave of refugees to EU countries. Over four million Ukrainians found safety and shelter within the European Union. Germany became the top country of refuge, welcoming over 1.3 million Ukrainian citizens. The Netherlands also emerged as leader in receiving refugees, with around 120,00 Ukrainians finding temporary homes there.

The European Union has demonstrated remarkable flexibility in managing this recent wave of migrants. Instead of giant, crowded refugee camps, they have found ways to integrate people into communities. This is a real credit to their immigration policies and the compassion of EU citizens. Achieving this would not have been possible without the international cooperation and social solidarity of EU citizens.

It is worth noting that Ukrainian refugees have shown an exceptional desire to integrate and become independent. They are not looking to be a burden on their host country. In Sweden, for instance, 56% of Ukrainians are already employed. Similarly high employment levels are found in other countries, for instance 46% in Denmark and 46% in Estonia. Many Ukrainians want financial independence and a stable life in their new home. In Poland, the first step for many fleeing the war, a staggering 71% of Ukrainians are already contributing to the economy by actively participating in the labor market. Analyses by Deloitte show their contribution to Poland's GDP in 2023 was a significant range of 0.7% to 1.1%.

The study, done by our team and by the the Centre for East European Studies at the University of Warsaw shows us that despite the many challenges, well-educated and skilled refugees from Ukraine are quite active in the labor market. They are also eager to learn new languages, which helps them to integrate and adapt to their new homes. Employers across the EU are taking note of their skills and offering employment opportunities- a big win for both the refugees and their host countries in the long run.

The influx of new talent brings a wider range of skills and experiences, contributing to the development of robust local economies.

Refugee migration has become one of the key challenges for Europe since the outbreak of the war in Ukraine on February 24th, 2022. In response to these events, our research team together with experts from the EWL Group was one of the first to start investigating this kind of migration. As early as March 2022 we conducted a survey and in May of that year, we presented the first report on the refugee situation in Poland. This report, which received a lot of media attention in Poland and internationally, was also published on the European Commission's website. Cooperation with the Masaryk University (Brno) and the University of Bucharest allowed us to repeat the survey with refugees in the Czech Republic and Romania, giving us a broader picture of the situation.

Data from our surveys show that a significant proportion of Ukrainian refugees in Poland, almost two-thirds, expressed willingness to take up employment, which is confirmed by the current data from the National Bank of Poland – 65% actually found employment. In the Czech Republic, according to our research this figure was 52%, while recent data shows that 51% of refugees found work in that country. In Romania, on the other hand, our survey showed the lowest percentage of those willing to take up employment. The latest data confirms the results of our survey – only 24% of refugees are working in Romania. These results provide valuable information for the Polish government, which already in 2023 commissioned us to produce two reports to better understand the dynamics of migration and its impact on Poland.

The financial contribution of Ukrainian refugees in Poland is also worth mentioning. Several hundred thousand of them working in Poland have paid more in taxes than the amount spent by Poland on financial aid and assistance, and it shows a significant contribution to the country's economic growth. Despite this fact, it often goes unnoticed in public debate. It is therefore worth promoting reliable studies and publications that shed light on the real economic impact of the presence of refugees and migrant workers, highlighting their role as active participants in the labour market.

More than two years after the outbreak of the war, we are witnessing another phase of migration – the movement of refugees from Poland to the West, including Germany and the Netherlands. With this in mind, we have focused our study specifically on these two countries to understand the influence migrants have on their economy and community. Initial findings suggest that refugees can be a driving force for these countries, contributing to their long-term stability and development.

*I invite you to read on!*

*I hope you will find the report interesting.*

## KEY FIGURES

### Ukrainian citizens in Germany

N=400



**51%** of Ukrainian citizens currently staying in Germany came with children

**74%** of Ukrainian citizens in Germany hold higher education degrees

**48%** of respondents say they speak German at least at a communicative level

**67%** of Ukrainian citizens currently staying in Germany declare they are working

**16%** of Ukrainian nationals in Germany work in the service sector

**€1334** represent the net average earnings of Ukrainian citizens in Germany

**36%** of respondents reported using German at work

**73%** of Ukrainian citizens recommend working in Germany to their friends and family

**40%** of respondents would like to stay in Germany for at least a few years

**57%** Ukrainian nationals with children see their children's future in Germany

### Ukrainian citizens in the Netherlands

N=400



**49%** of Ukrainian citizens staying in the Netherlands arrived with children

**75%** of Ukrainian citizens in the Netherlands hold higher education degrees

**52%** of respondents say they speak Dutch at least at a communicative level

**61%** of Ukrainian citizens currently staying in the Netherlands declare they are working

**17%** of Ukrainian nationals in the Netherlands work in the service sector

**€1104** represent the net average earnings of Ukrainian citizens in the Netherlands

**51%** of respondents reported using Dutch at work

**82%** of Ukrainian citizens recommend working in the Netherlands to their friends and family

**50%** of respondents would like to stay in the Netherlands for at least a few years

**60%** of Ukrainian nationals with children see their children's future in the Netherlands

**Ukrainian women form the vast majority of migrants in both Germany and the Netherlands. They constitute the larger share of Ukrainians who have arrived in these countries, seeking work or refuge from the war. In fact, they make up a remarkable 85% in Germany and 79% in the Netherlands.** This significant difference in gender demographics highlights the unique characteristics of this migrant group. The average age of Ukrainian citizens is 36 years old in Germany and 38 in the Netherlands. Additionally, a high proportion, around 95% of those surveyed, are within working age, which is an important factor for their integration into the job market. However, while the majority are young women, which should theoretically make it easier for them to find employment, it is worth bearing in mind that they may face additional challenges. For example, childcare responsibilities could create hurdles for them to enter the workforce.

**Ukrainian nationals in Germany and the Netherlands represent a very high level of education and language skills, which can enhance their labour market opportunities in host countries.** Seventy-four percent of respondents in Germany have a university degree or some college experience, and that number jumps to 75% in the Netherlands. In addition, more than half of Ukrainians in both countries (56% in Germany and 57% in the Netherlands) report being comfortable communicating in English, which greatly facilitates their integration into society and also opens additional career opportunities in international companies. Furthermore, 52% of Ukrainian nationals in the Netherlands admit that they speak the language of their host country, while in Germany 48% of respondents declare knowledge of German.

**Half of Ukrainian nationals in Germany and in the Netherlands, 51% and 50% respectively, declare that they arrived with children under the age of 18.** Among them, more than half indicate that their children benefit from both education systems, i.e. 60% in Germany benefitting from both Ukrainian and German, and 56% in the Netherlands, benefitting from both Ukrainian and Dutch. In Germany, about a quarter (24%) of Ukrainian children are solely in the German system, while in the Netherlands, that number is a bit higher at 30%. In Germany, a significant proportion (66%) of Ukrainian citizens rate the availability of childcare that enables parents to work or pursue training as 'definitely good' or 'rather good.' The Netherlands shows an even more positive response, with a staggering 86% of respondents rating this aspect favorably. Notably, over half (56%) view childcare provision very positively.

**Most Ukrainians in Germany and the Netherlands rely on some financial aid. 63% of Ukrainians in Germany and 81% of Ukrainians in the Netherlands**

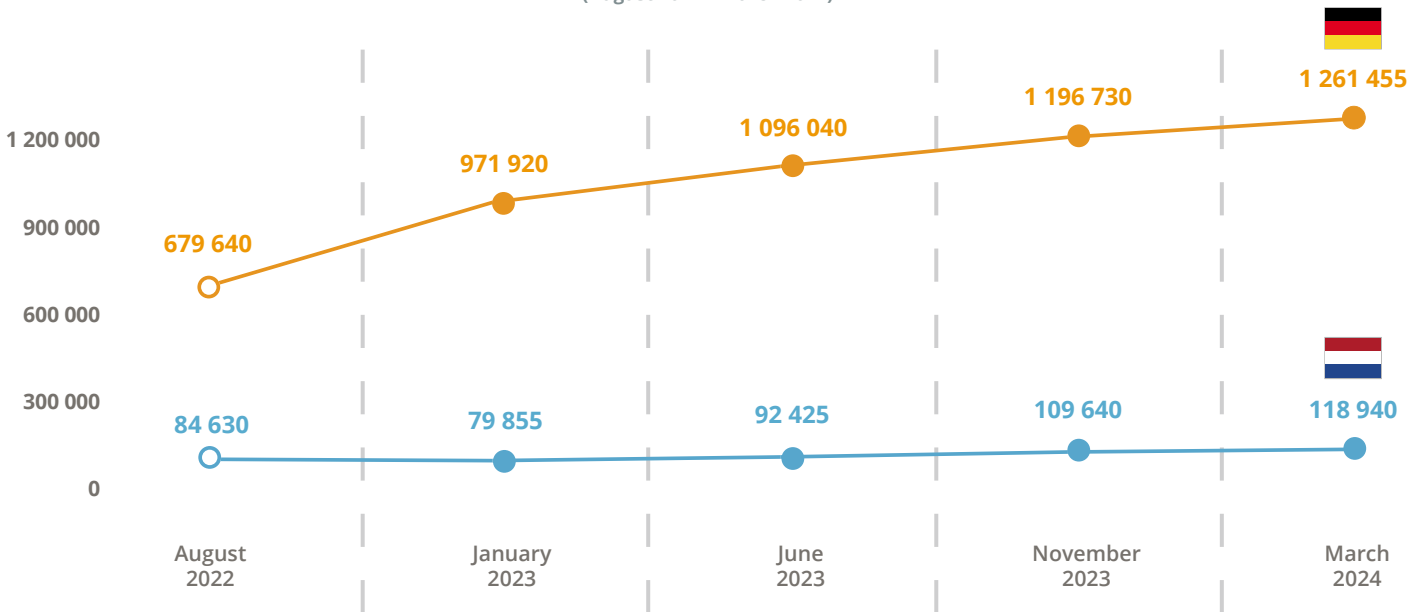
**receive financial assistance from the country they are currently staying in.** This situation reflects the reality faced by the refugees, who are often deprived of a steady source of income and of social assistance from their host countries. Despite the fact that 44% of respondents in Germany and 40% of respondents in the Netherlands declare that the financial assistance they receive allows them to support themselves, they choose to take up employment. This is a very optimistic sign, suggesting that Ukrainian citizens in the EU need the proverbial fishing rod, not the fish. It is worth mentioning that almost half of the respondents in both countries (47% in Germany and 48% in the Netherlands) admit that they would be interested in attending courses to improve their professional skills if the employer covered half of the costs.

**Sixty-seven percent of Ukrainian citizens in Germany and 61% in Netherlands, are currently working – most often in the service industry (16% and 17% respectively).** This is a high employment rate, indicating substantial participation in the labour market among Ukrainian citizens in these countries. Ukrainian citizens working in Germany earn on average €1,334 net per month and €1,304 in the Netherlands. This is roughly two and a half times higher than the average salary back in Ukraine, which could be a significant motivating factor for labour migration in the future. Despite relatively high earnings, almost three quarters of the respondents in both countries, 70% in Germany and 73% in the Netherlands, assess their financial situation as average, which may be related to the higher cost of living in the host countries. The survey found that more than half of Ukrainian citizens in Germany and the Netherlands, 73% and 83% respectively, would be willing to recommend working in these countries to their relatives and friends, showing that most of them have a positive experience of employment in these countries.

**In Germany, nearly a third (32%) of Ukrainian citizens plan to stay for several years. This may be due to the relatively stable living and working conditions Germany offers. The Netherlands sees an even higher intention to stay, with 44% of Ukrainian citizens there planning to remain for several years.** Among the reasons motivating them to stay in Germany and the Netherlands, Ukrainian citizens point to: facilitations for Ukrainian citizens and simplified procedures for the legalisation of residence. In this context, it is also worth noting the factors favouring integration in the new countries, among which Ukrainian citizens mention: broad access to social benefits, easier access to language courses and integration into the local community. However, several factors discourage Ukrainian citizens from settling permanently in Germany or the Netherlands. These include the desire to return home to Ukraine, limited proficiency in the host country's language, and concerns about relatives back home.

## Number of Ukrainian citizens receiving temporary protection in Germany and the Netherlands

(August 2022 – March 2024)

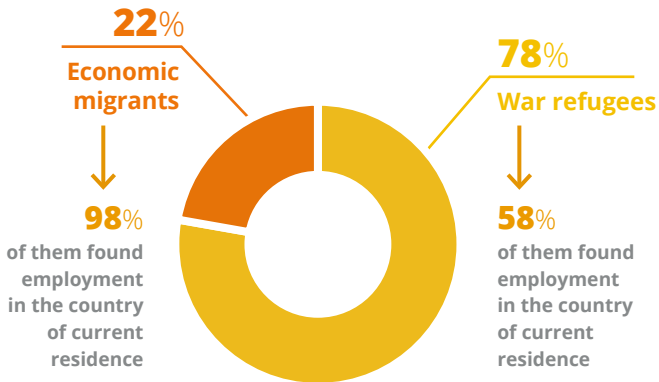


Data: Eurostat

## How do you define your status in your country of current residence?

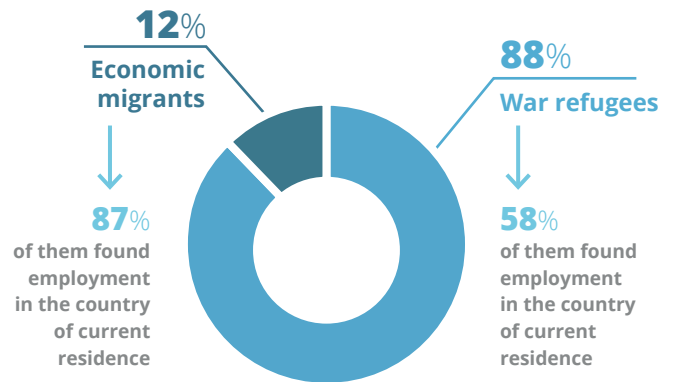
### Ukrainian citizens in Germany

N=400



### Ukrainian citizens in the Netherlands

N=400



Millions of Ukrainian refugees have fled the war following Russia's February 2022 invasion. The European Union has granted temporary protection status to those fleeing the conflict, with over 4 million refugees currently residing within its borders. Germany and the Netherlands stand out as two of the EU's member states that have taken in over a third of all refugees.

Since August 2022, the number of Ukrainian refugees in Germany has steadily risen, reaching a peak of over 1.26 million in March 2024. The Netherlands has also seen an increase in refugees, though at a slower pace,


with nearly 120,000 Ukrainians registered there in March 2024.

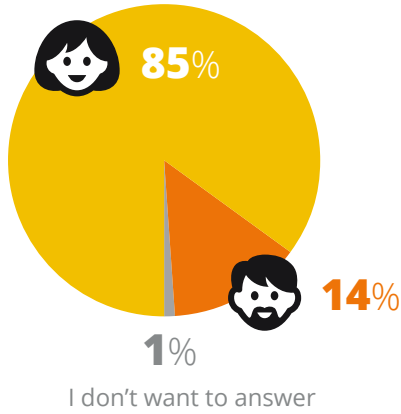
The survey revealed a clear distinction between Ukrainian migrants in Germany and the Netherlands. In Germany, 78% identified as war refugees, while the remaining 22% classified themselves as economic migrants. The Netherlands displayed a higher proportion of war refugees, with 88% identifying as such compared to only 12% who categorized themselves as economic migrants. Interestingly, for both Germany and the Netherlands, the employment rate for Ukrainian war refugees was identical at 58%.

# RESPONDENT PROFILE: GENDER, AGE

## Gender

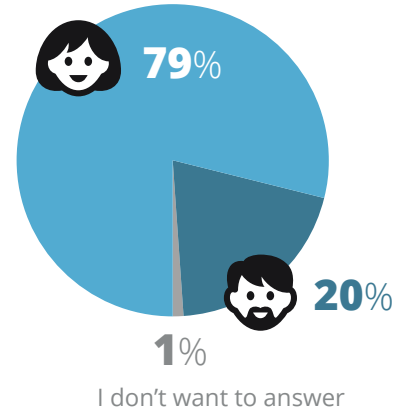
Ukrainian citizens in Germany

N=400 



Ukrainian citizens in the Netherlands

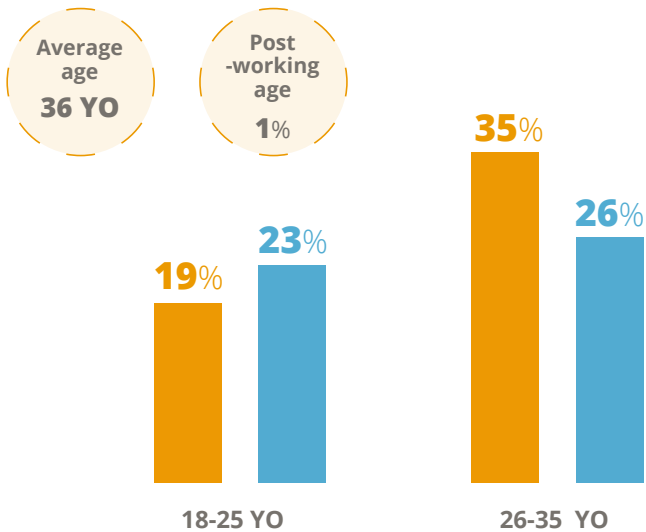
N=400 



## Age

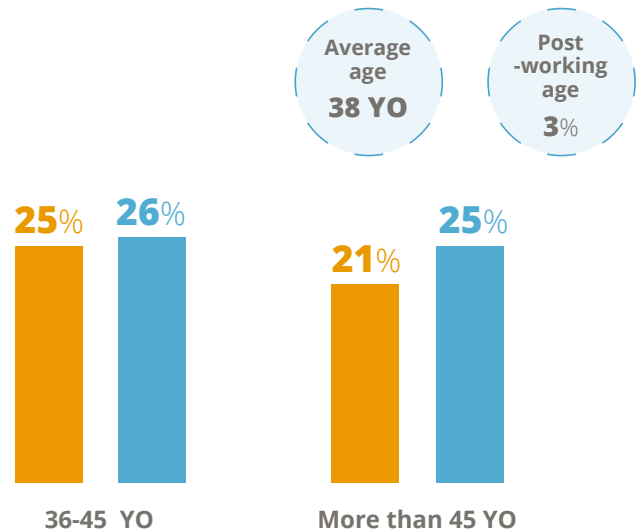
Ukrainian citizens in Germany

N=400 



Ukrainian citizens in the Netherlands

N=400 

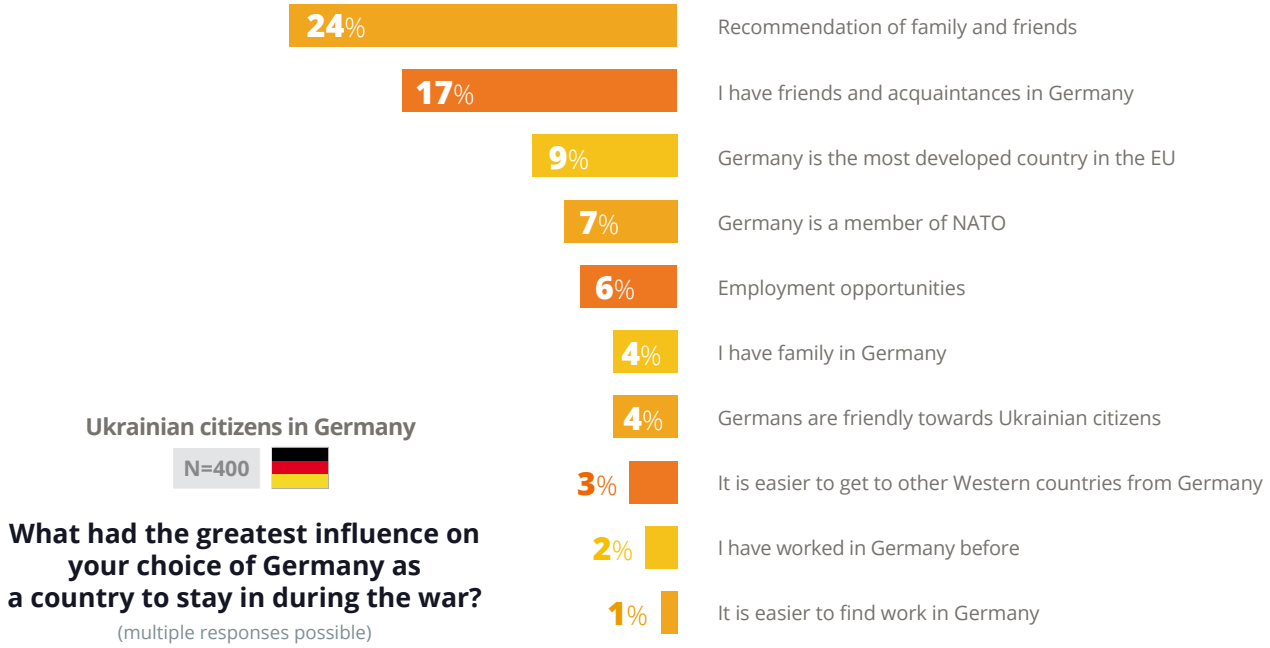


Analysing the profile of the survey participants in terms of demographics, it should be noted that women clearly make up the bulk of Ukrainian citizens living in Germany and the Netherlands entailing both economic migrants and war refugees. This higher proportion of women is mainly due to the introduction of martial law in Ukraine on February 24th, 2022 and the associated ban imposed on men between the ages of 18 and 60 which prevents them from leaving the country (with some exceptions).

A significant portion of Ukrainian citizens residing in Germany (35%) fall within the 26-35 age range.

In the Netherlands, this age group (26-45) is even more prominent, representing 52% of Ukrainian residents. This is reflected in the average age, which is 36 in Germany and 38 in the Netherlands. These figures indicate a high concentration of working-age individuals with valuable experience and qualifications. Additionally, the Netherlands has a larger proportion of young adults (18-25 years old) at 23%, compared to 19% in Germany. Young adults are typically more mobile and willing to relocate abroad. Finally, the post-working-age group is relatively small in both countries, with only 1% in Germany and 3% in the Netherlands.

## DESTINATION COUNTRY

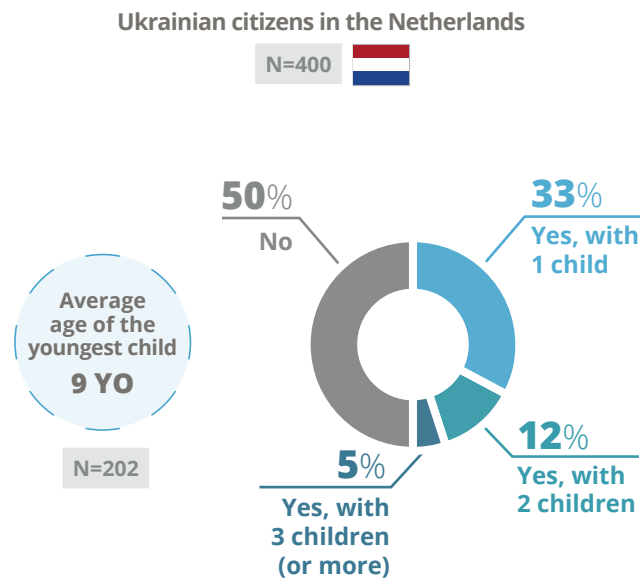
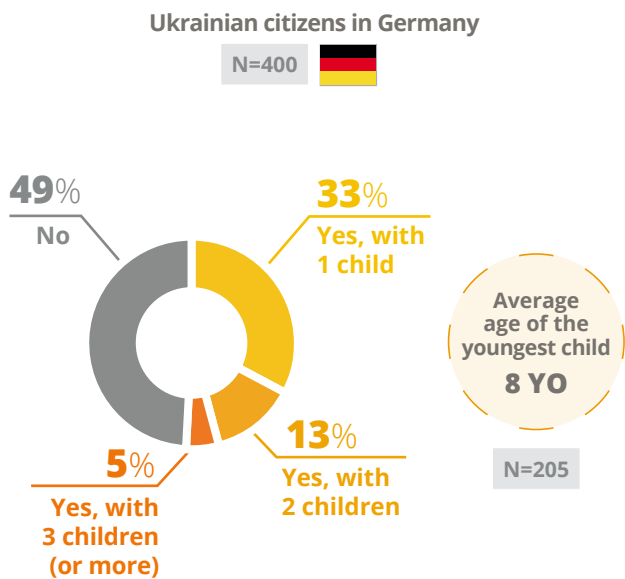


Ukrainian citizens most often come to Germany as a result of recommendation by family and friends (24%) or at the invitation of relatives living there (17%). Twenty-two percent of Ukrainian citizens in the Netherlands admitted that the determining factor for which country they chose were recommendations from family and friends. Ten percent of respondents in the Netherlands chose employment opportunities as the reason for choosing a country compared to just 6 % of respondents residing in Germany.

Other factors that attracted people to Germany is its position as the EU's most developed nation, accounting for 9% of those surveyed, and its membership in the NATO alliance (7%). With regard to the Netherlands other important reasons for choosing the country include the fact that it is easier to find employment there and having friends and family nearby (8% and 8% respectively).

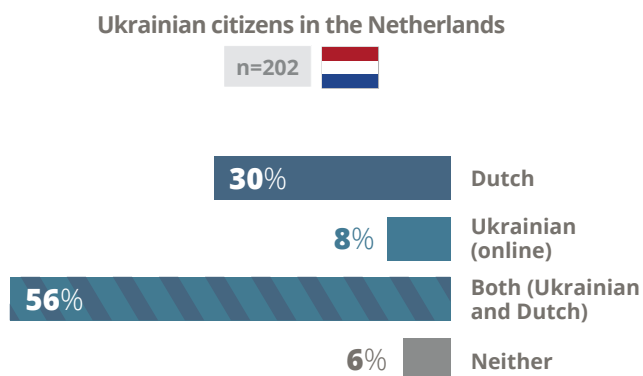
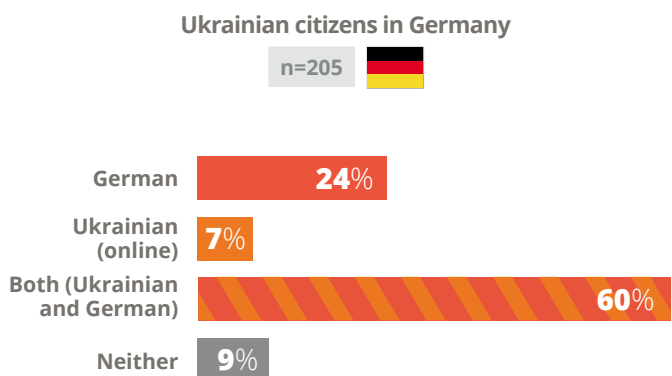


## Did you come to the country of current residence with children under the age of 18?



## Which education system do your children who are in the country of current residence benefit from?

(among those who have children)

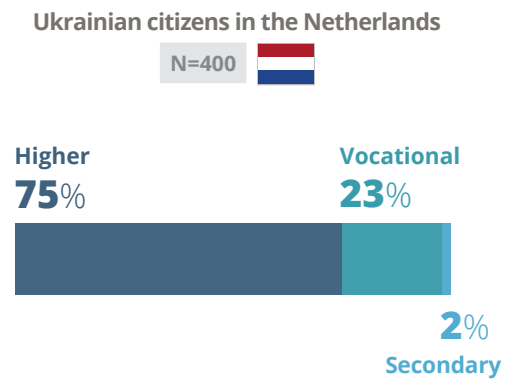
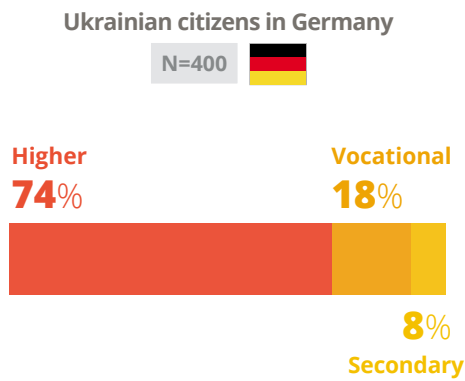


Half of Ukrainian citizens in Germany and the Netherlands, 51% and 50% respectively, say they came with children under the age of 18. In both countries, a third of respondents (33%) admitted to coming with one child. On average, the youngest child's age in Germany is eight, while in the Netherlands it's nine.

Among Ukrainian families in Germany and the Netherlands, over half (60% and 56% respectively)

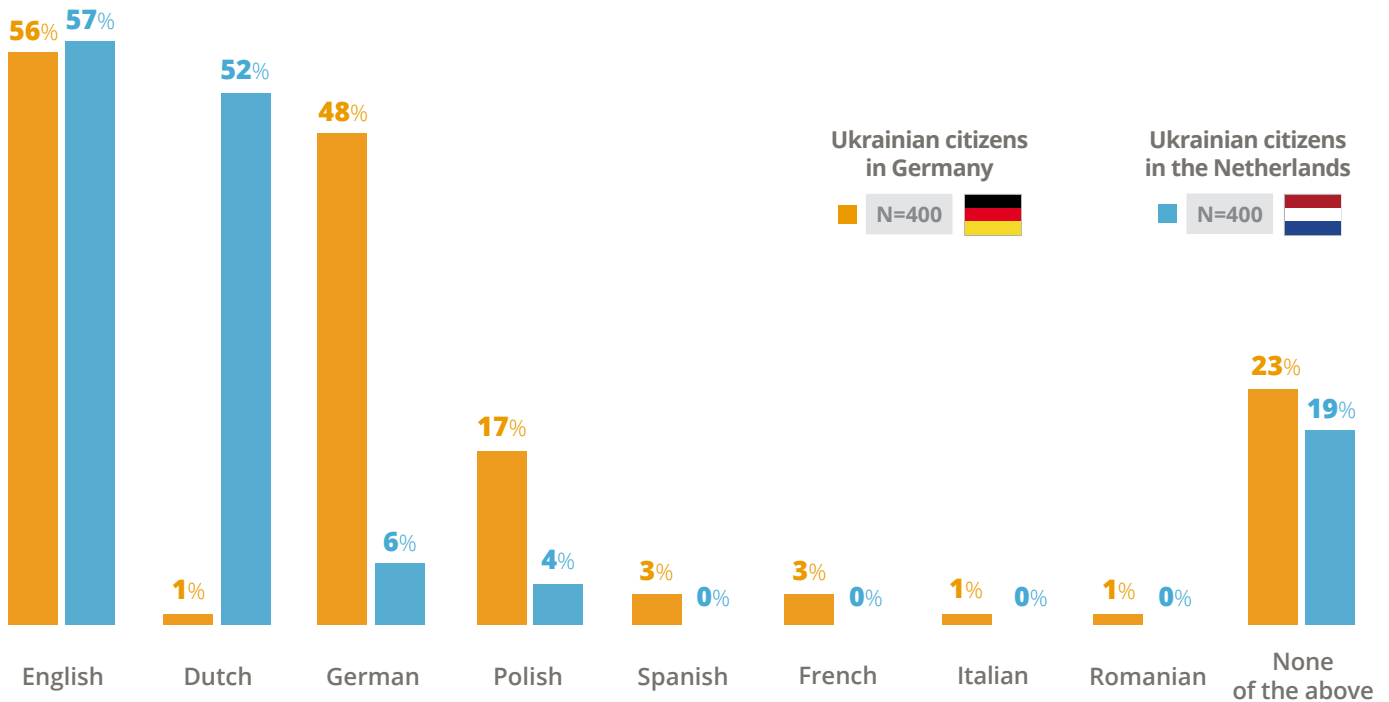
reported using both the Ukrainian and the local education system. In Germany, nearly a quarter (24%) of Ukrainian families rely solely on the German system, while in the Netherlands, that number is 30% for the Dutch system. It is worth noting that 9% of respondents in Germany and 6% of respondents in the Netherlands say that their children are not covered by any education system.

## Education



## Which languages do you speak at least at a communicative level?

(multiple responses possible)



Ukrainian citizens in Germany and the Netherlands boast a very high level of education. In Germany, 74% of respondents hold a university degree or have completed some college, with the Netherlands following closely at 75%. One in four respondents in Germany (18%) and one in four in the Netherlands (23%) has secondary school education.

In addition, more than half of Ukrainian citizens in Germany (56%) and the Netherlands (57%) say they

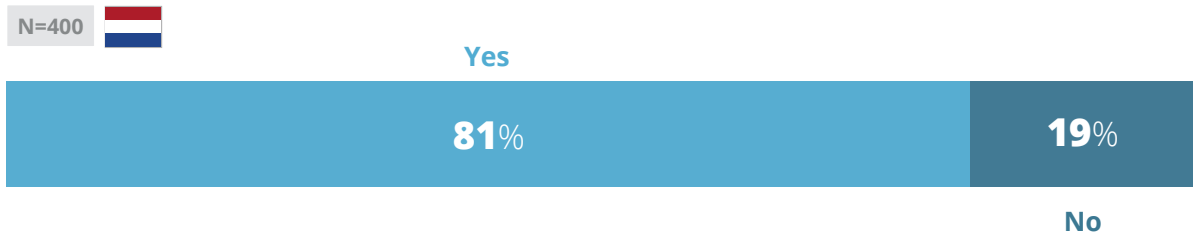
speak English at a communicative level. Half (52%) of Ukrainian citizens in the Netherlands admit that they speak the language of their host country to varying degrees. In the case of Germany 48% of respondents declare knowledge of the country's language. Interestingly, 17% of Ukrainian nationals in Germany also point to their knowledge of Polish, which may indicate previous work experience in that country.

## Do you benefit from financial aid in the country of current residence?

### Ukrainian citizens in Germany

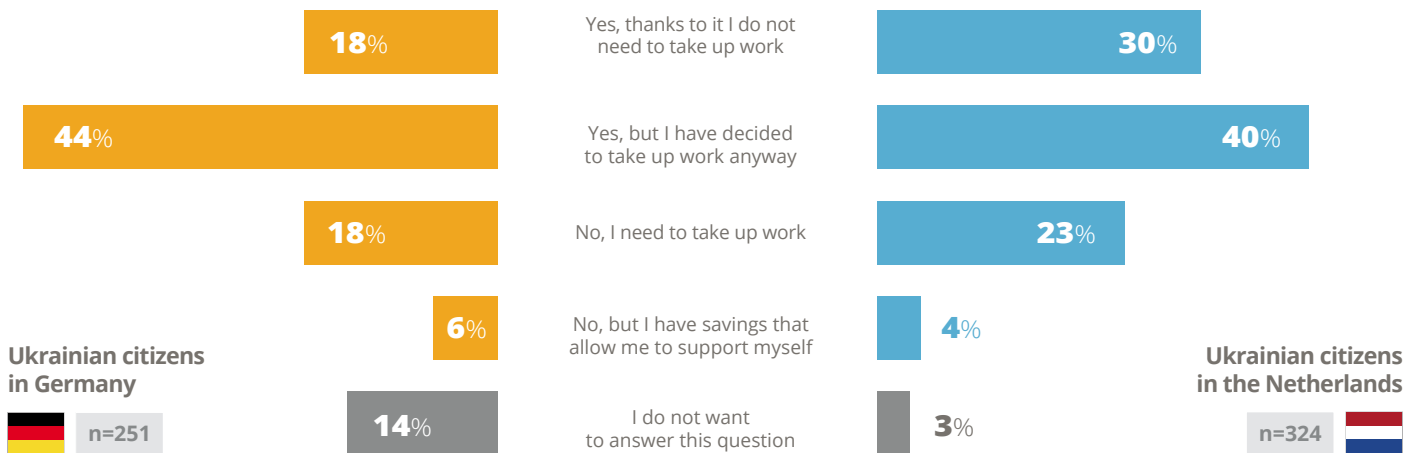


### Ukrainian citizens in the Netherlands



## Does the country's financial aid allow you to support yourself in the country of residence?

(among those who receive financial aid)

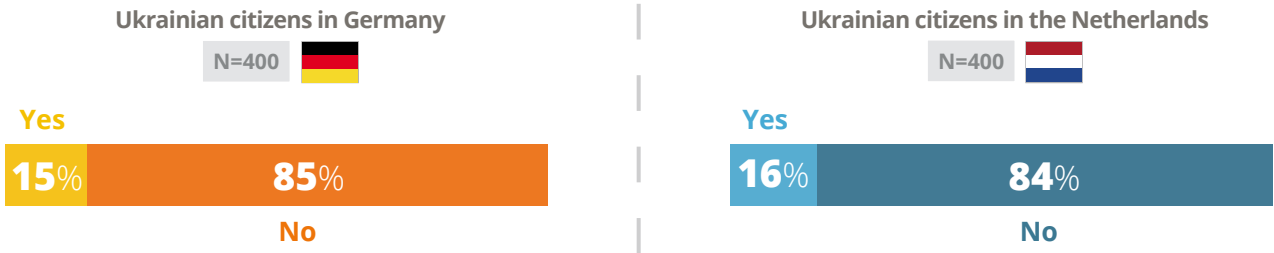


Most Ukrainian refugees in Germany (63%) and the Netherlands (a much higher 81%) rely on financial assistance. This reflects the challenges they face, often lacking a regular income and needing support from their host countries. The need arose after millions fled Ukraine following Russia's 2022 invasion.

In addition to humanitarian aid, many countries, including Germany and the Netherlands, have

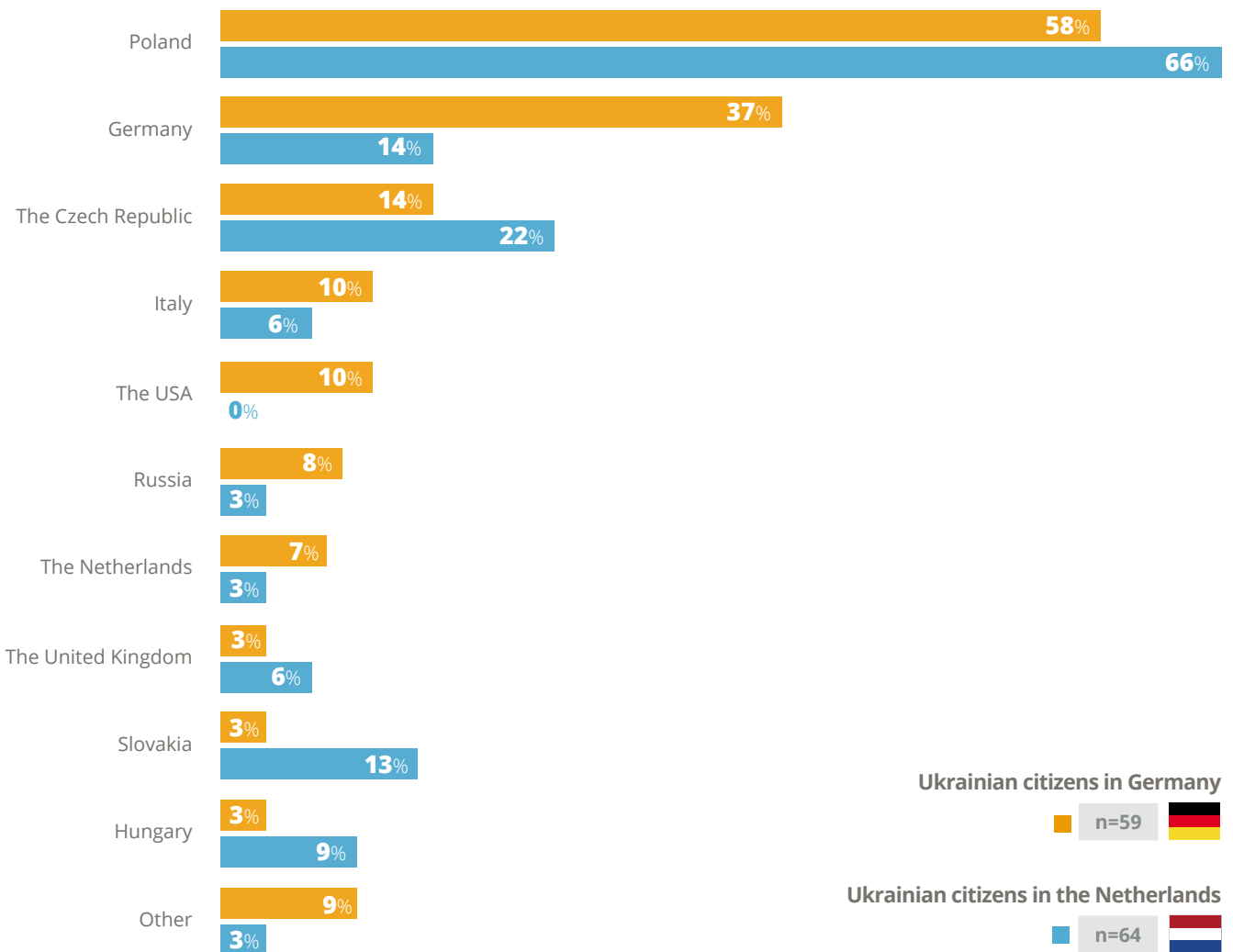
implemented special financial support programmes to help refugees adapt to the new conditions. Interestingly, nearly half of those surveyed in both Germany (44%) and the Netherlands (40%) say the financial aid they receive allows them to live in their host country. Yet, they still choose to find employment.

## Have you worked abroad before?



## In which foreign countries did you work before the outbreak of the war?

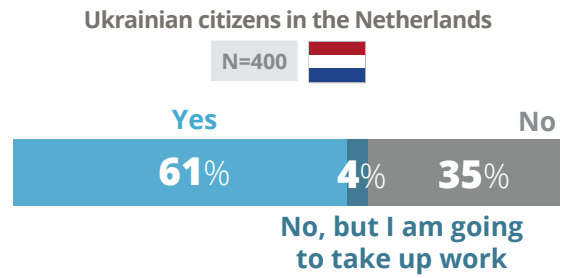
(among those who worked abroad, multiple responses possible)



A striking 85% of Ukrainians in Germany and 84% in the Netherlands have never worked abroad before. Among Ukrainian citizens currently staying in Germany who have had the opportunity to work outside their country, the most commonly chosen countries were Poland (58%), Germany (37%) and Czechia (14%).

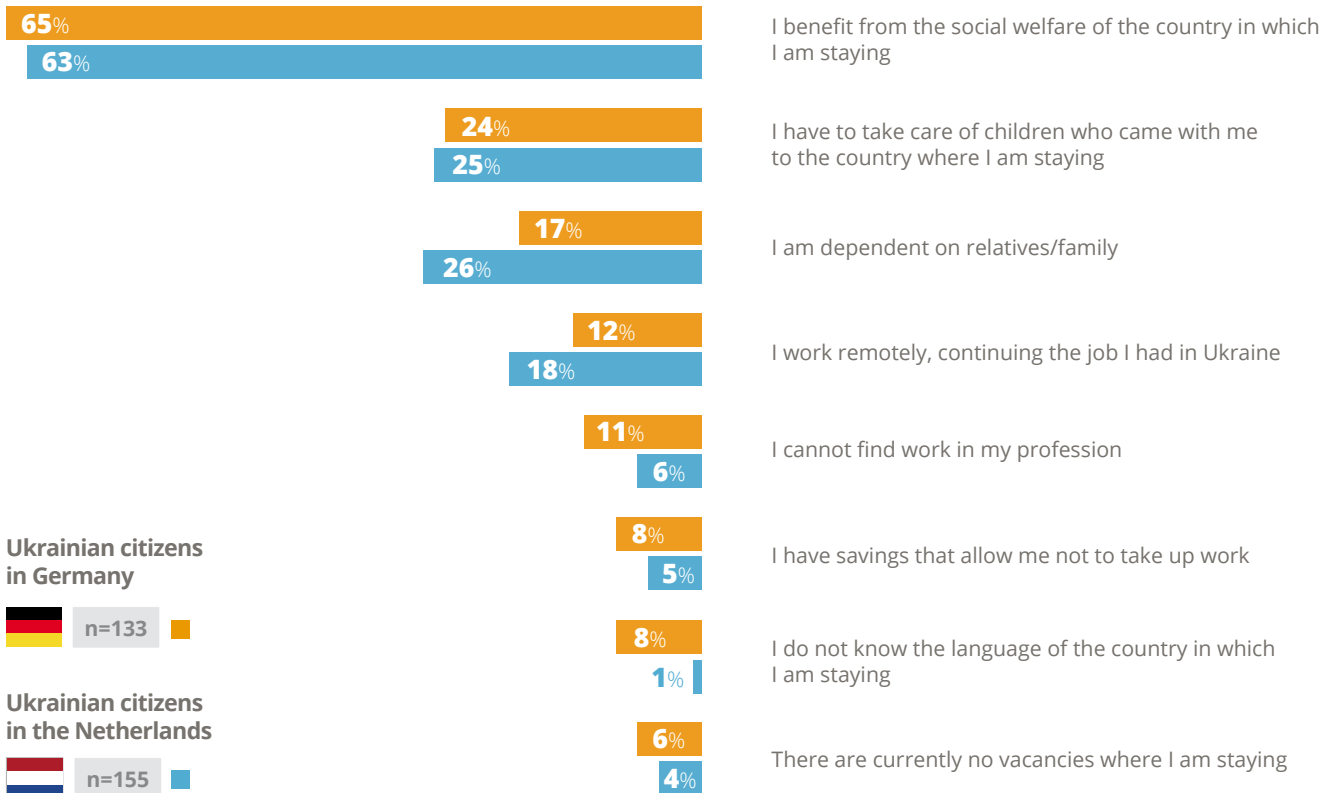
For Ukrainian citizens in the Netherlands who have had the opportunity to work abroad before, more than half of respondents indicated having worked in Poland (66%) and more than one in five respondents indicated the Czech Republic (22%).

## Are you currently working in the country of current residence?



## What are the reasons for not taking up employment in the country of current residence?

(among those who do not work, multiple responses possible)



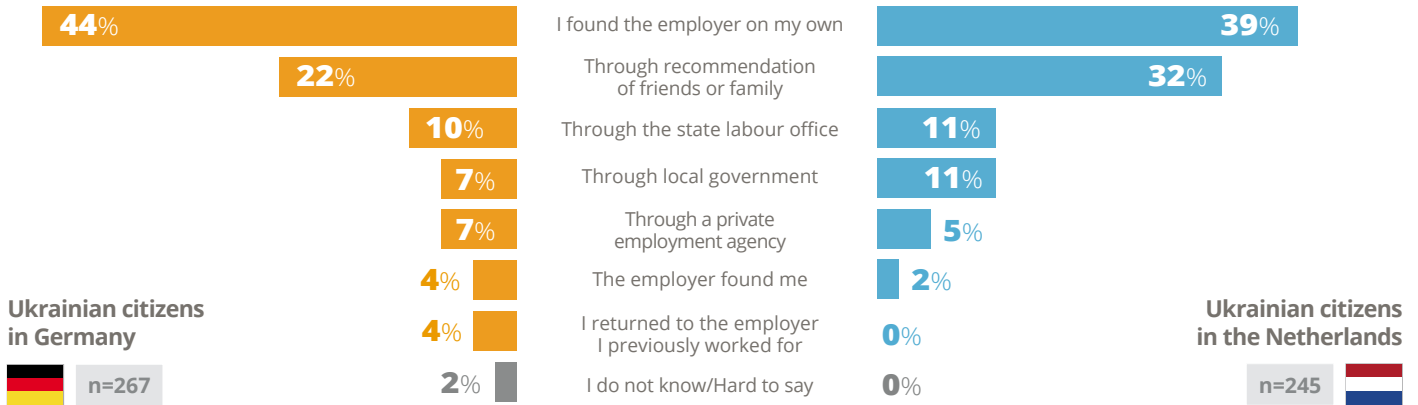
It is worth observing that 67% of survey participants in Germany said they have already found work or are taking preparatory courses for employment. A slightly lower percentage is found in the Netherlands, where 61% of Ukrainian citizens declare employment. The intention to work in Germany and the Netherlands is expressed by respectively: 13% and 4% of respondents. It is noteworthy that among interviewees who identify themselves as refugees, the employment rate is 58% in both countries.

Over a third of Ukrainians in the Netherlands (35%) aren't currently working. This is nearly double the rate in Germany, where only 20% are unemployed.

The main reasons Ukrainians give for not working are similar in both countries. Financial aid plays a big role, with 65% in Germany and 63% in the Netherlands citing it. Childcare responsibilities also factor in, affecting 24% and 25% respectively. Finally, dependence on family is more prevalent in the Netherlands, with 26% relying on them compared to 17% in Germany.

## How did you find your current work in the country of current residence?

(among those who work)



## What were the most common problems you encountered while looking for employment?

(among those who work, multiple responses possible)

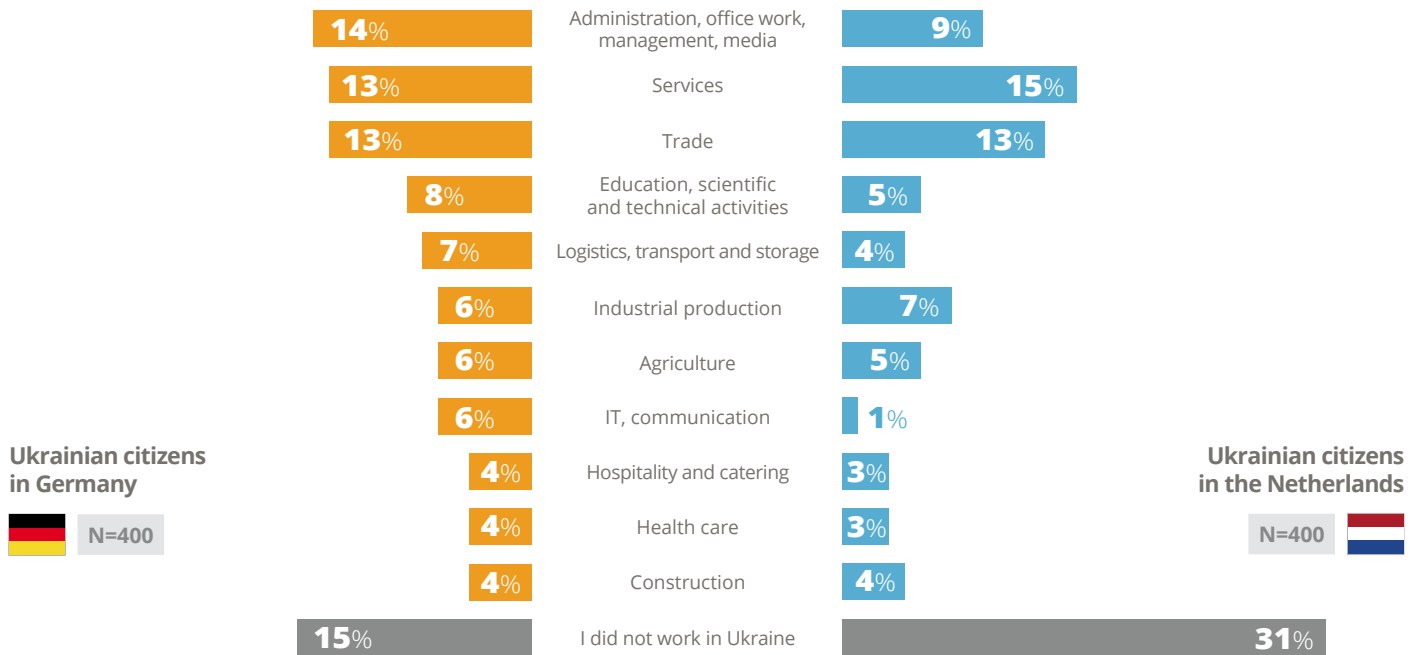


Almost half of Ukrainian citizens in Germany (44%) found an employer on their own and nearly one in four (22%) through recommendations from friends or family. In the Netherlands 39% of Ukrainian citizens found employment on their own and 32% through recommendations from friends or family. It ought to be emphasised that 7% of respondents in Germany and 5% of respondents in the Netherlands said that they had found work through a private employment agency.

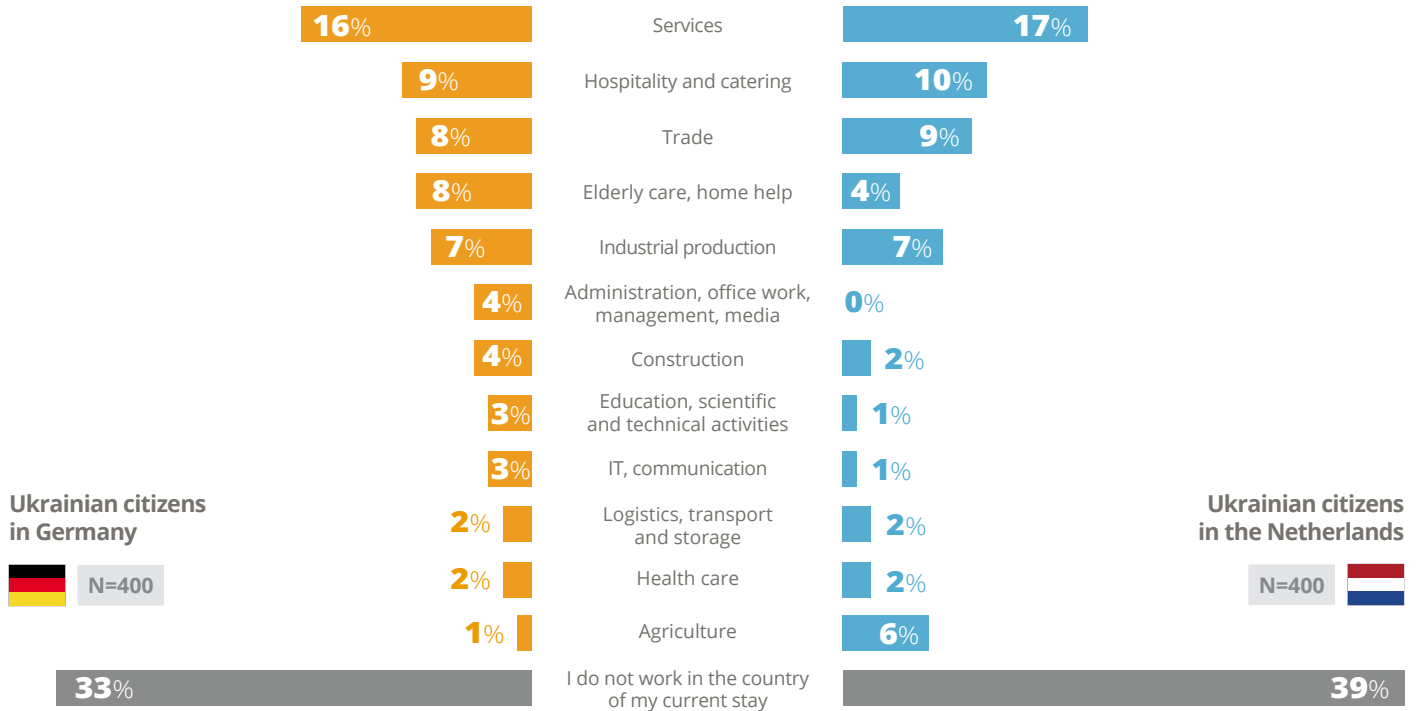
Among the most common problems Ukrainian citizens encountered when looking for a job in Germany were: not being qualified enough for the positions they were interested in (31%) and a lack of offers that met their expectations (23%). In the Netherlands, on the other hand, Ukrainian citizens most often pointed to a lack of job offers (34%), limited mobility (28%) and a lack of offers meeting their expectations (25%). 34% of respondents in Germany and 26% of respondents in the Netherlands claimed that they had not encountered any problems during their job search.

# EMPLOYMENT

## Last employment sector in Ukraine



## Sector of employment in the country of current residence



In their home country, Ukrainian citizens most frequently held jobs in administration (14%), followed closely by service (13%) and trade sectors (13%). Education, scientific and technical fields (8%) and logistics (7%) were also common pre-migration professions. Before coming to the Netherlands, Ukrainian citizens most often worked in their country in services (15%), trade (13%), administration (9%) and industrial production (7%).

After arriving in Germany, Ukrainian citizens were most likely to work in services (16%), hospitality (9%), trade (8%), elderly care and home help (8%) and industrial production (7%). In the Netherlands Ukrainian nationals most often took up employment in services (17%), hospitality (10%), trade (9%), industrial production (7%) and agriculture (6%).

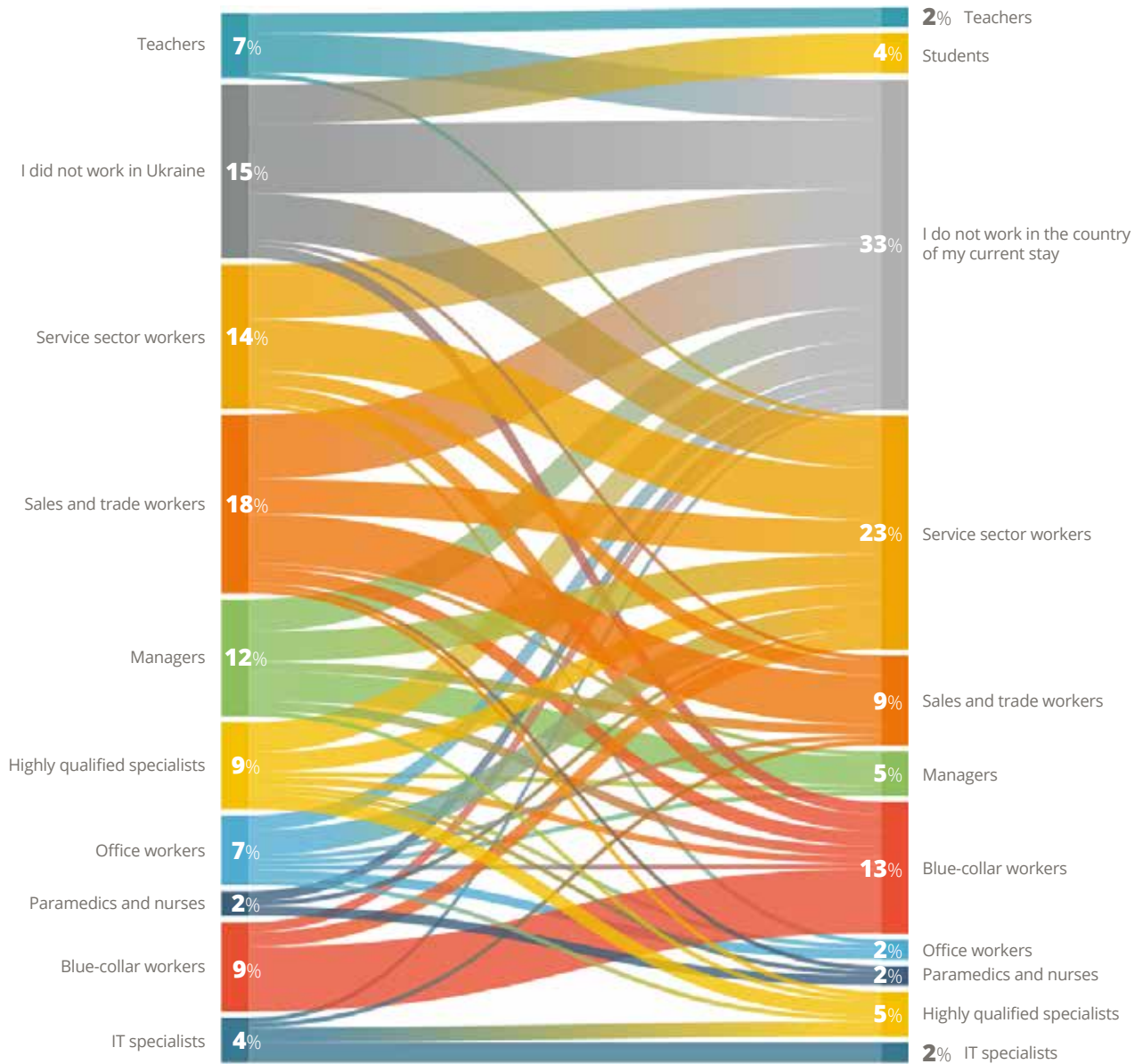
What was your job position in Ukraine?

What is your current job position?



Ukrainian citizens in Germany

N=400



The study demonstrates that Ukrainian citizens working in the service sector (14%) remained in their profession also in the German labour market (23%). In the case of Ukrainian workers in the trade sector (18%), half of them remained in their profession and some of them did not take up employment in Germany.

Among those Ukrainians who are not currently working (15%), a significant portion chose not to seek employment in Germany. However, many others did find jobs, particularly in the service or trade sectors.



# EMPLOYMENT

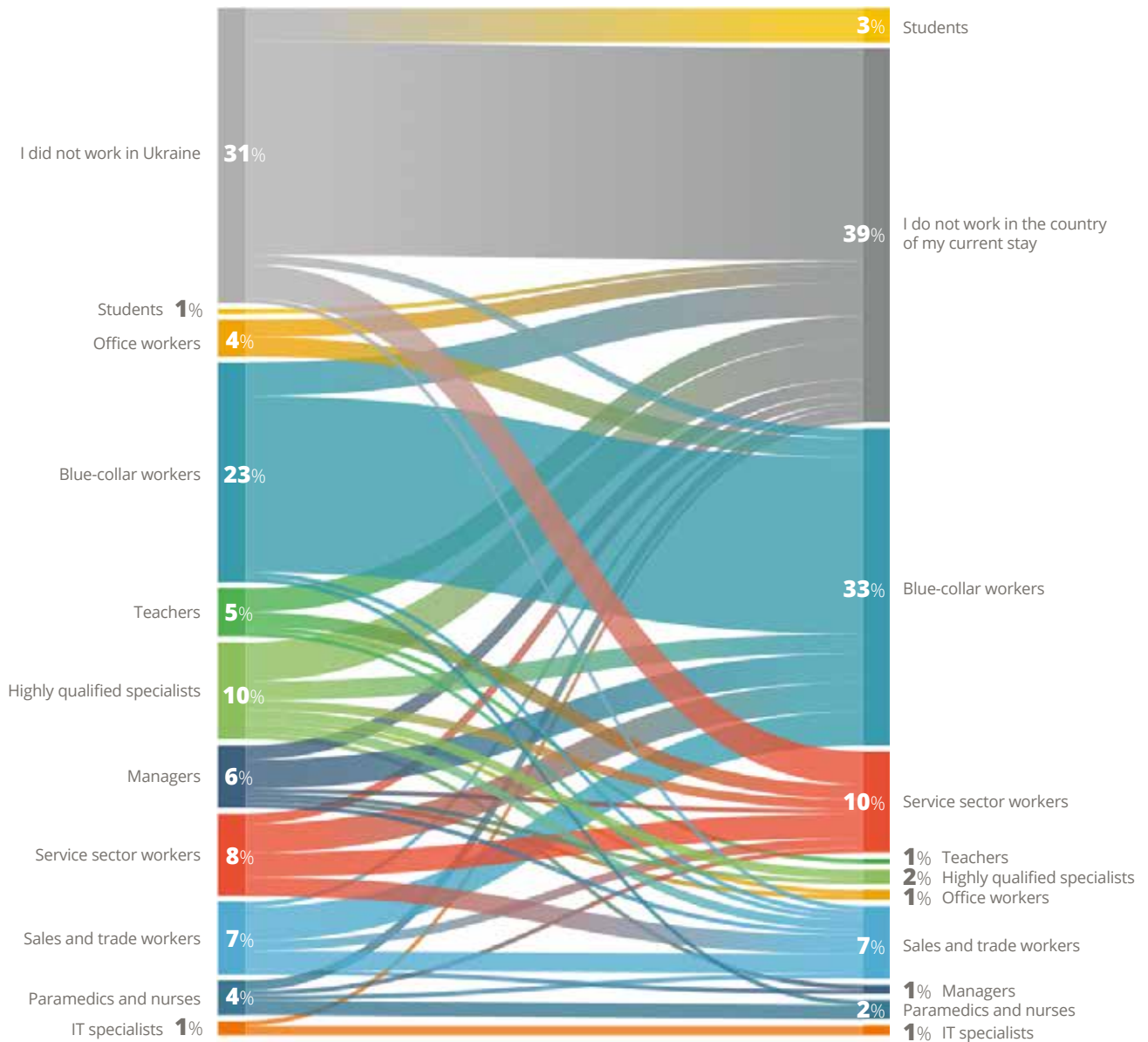
What was your job position in Ukraine?

What is your current job position?



Ukrainian citizens in the Netherlands

N=400



The survey revealed employment trends for Ukrainians in the Netherlands. Manual workers (23%) largely stayed in their field, with a significant number (33%) finding manual labor jobs in the Dutch market. Ukrainian nationals working in the service sector (8%) also chose to continue working in their profession

in the new country (10%). However, 10 % of highly qualified specialists opted to retrain for service sector or manual work positions. Those not employed in Ukraine (31%) mainly took up work in the service sector (10%) or decided not to take up employment in their new country (39%).

# EARNINGS AND FINANCIAL SITUATION

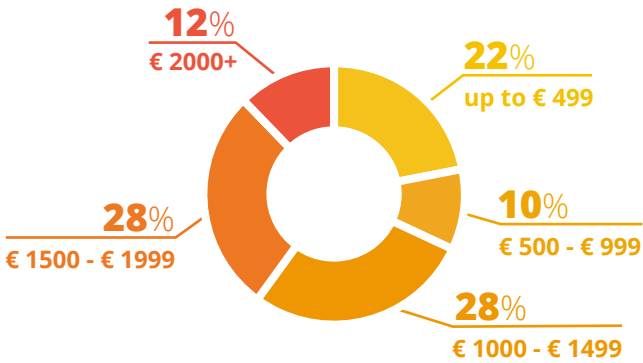
## Average monthly earnings (net) in the country of current residence?

(among those who work)

### Ukrainian citizens in Germany

 n=267

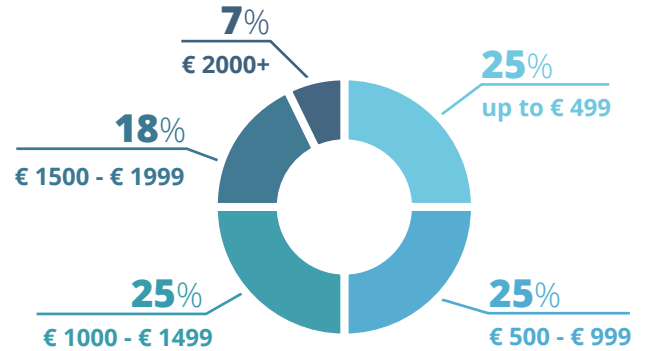
Average monthly net earnings  
**€ 1334**



### Ukrainian citizens in the Netherlands

n=245 

Average monthly net earnings  
**€ 1104**



## How would you assess your financial situation?

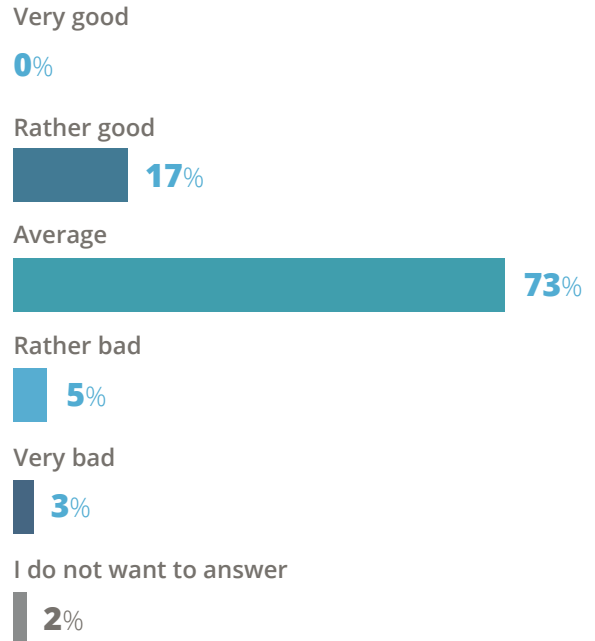
### Ukrainian citizens in Germany

N=400 



### Ukrainian citizens in the Netherlands

N=400 



Ukrainian citizens working in Germany take home a significantly higher net salary compared to their home country. On average, they earn €1,334 per month net. This is roughly four times the average net salary in Ukraine. Similarly, Ukrainians in the Netherlands see a substantial increase in their earnings, averaging a net salary of €1,104 per month – roughly three times higher than the average back home. More than a quarter of the respondents in Germany (28%) admitted to being paid between €1,500

and €1,999 net, while 22% of respondents indicated earnings of less than €499. In the Netherlands, Ukrainian citizens' earnings are spread across three main ranges. A quarter (25%) reported net salaries between €1,000 and €1,499, while similar proportions (25% each) fell into the €500-€999 and below €499 net salary ranges. Almost three quarters of the respondents in both countries, 70% in Germany and 73% in the Netherlands, assess their financial situation as average.

## Do you send money to Ukraine?

### Ukrainian citizens in Germany

N=400



Yes



No, I receive money from Ukraine



No, I do not



### Ukrainian citizens in the Netherlands

N=400



Yes



No, I receive money from Ukraine



No, I do not



## What amount do you send to Ukraine each month?

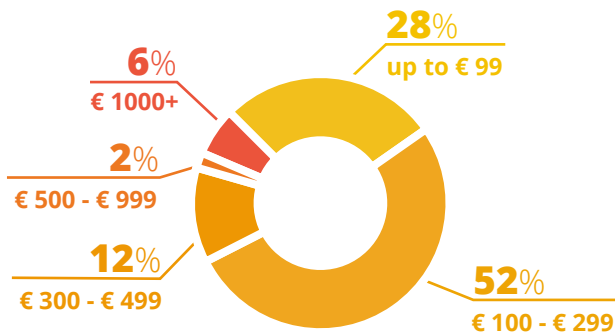
(among those who send money)

### Ukrainian citizens in Germany



n=98

Average monthly transfers  
€ 295

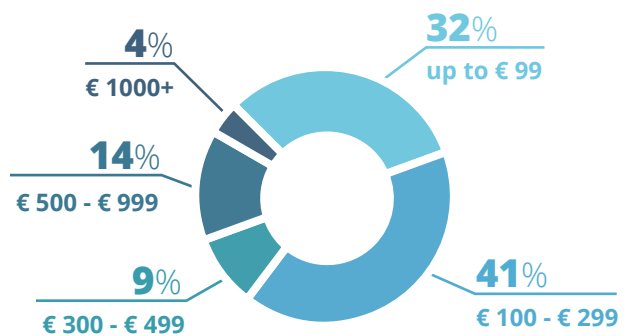


### Ukrainian citizens in the Netherlands

n=44



Average monthly transfers  
€ 323



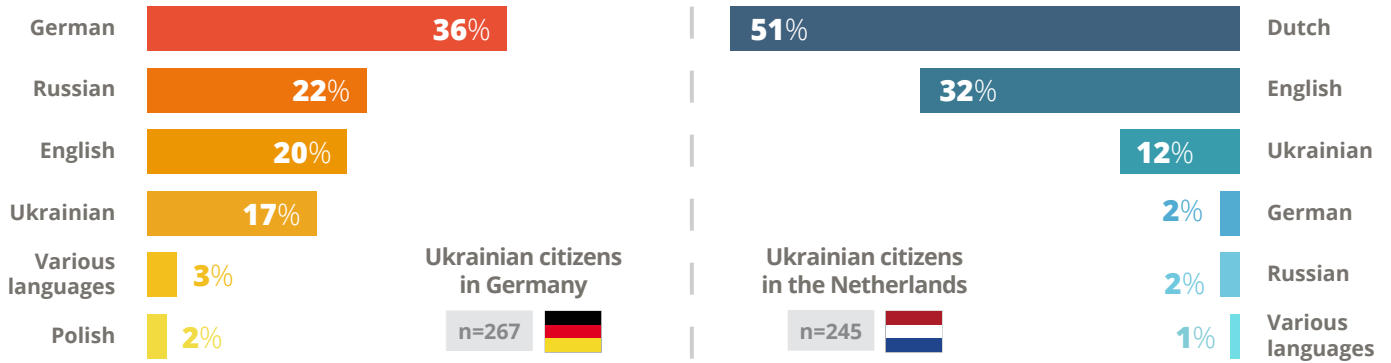
The study demonstrates that 25% of Ukrainian citizens in Germany send money to their home country. This gesture of financial support is crucial for families and loved ones remaining in Ukraine in the face of war, often in difficult economic and social conditions. In the case of the Netherlands, the percentage of people sending financial support to their home country

amounts to 11%. Ukrainian citizens working in the Netherlands see their earnings distributed across three main income brackets. A quarter (25%) earn between €1,000 and €1,499 net per month. The remaining half are almost evenly split between the €500-€999 and below €499 net salary ranges.

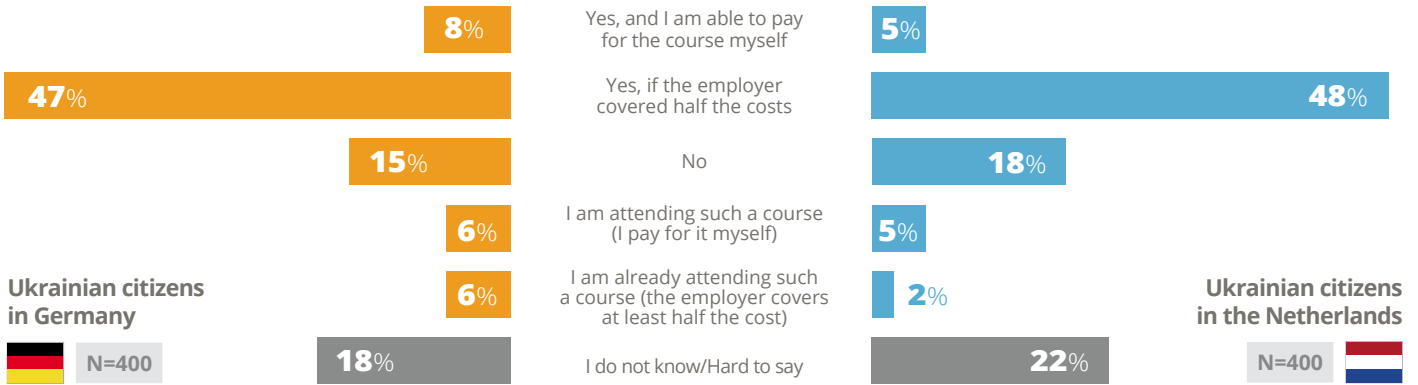
# WORKING CONDITION

## What languages do you happen to communicate in at work in the country of current residence?

(among those who work, multiple responses possible)

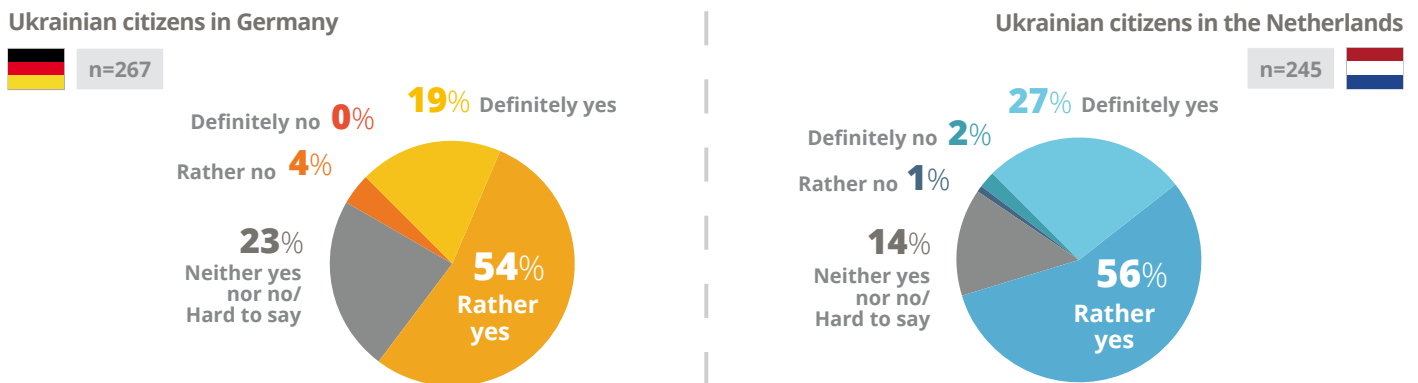


## Would you be interested in taking courses to improve your professional skills in the country of current residence?



## Would you recommend working in the country of current residence to your friends and relatives?

(among those who work)



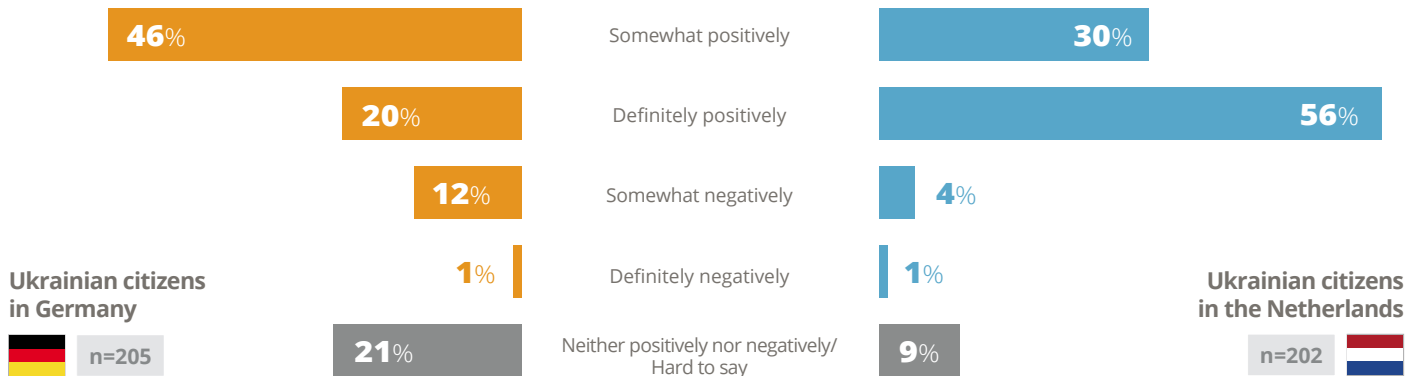
In Germany, over a third (36%) of respondents say they communicate in German at work. English follows closely, with one in five respondents (20%) indicating they use it in their workplace. More than half of the respondents in the Netherlands (51%) declare that they communicate in Dutch at work and frequently in

English (32%). In addition, it is worth noting that almost half of the respondents in both countries (47% in Germany and 48% in the Netherlands) claim that they would be interested in attending courses to improve their professional skills if the employer covered half of the costs.

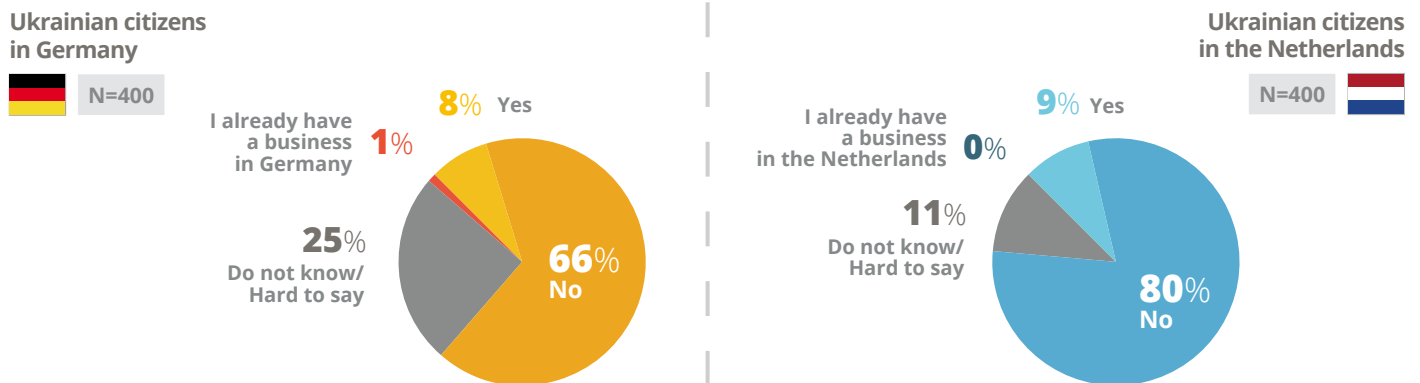
## WORK CONDITIONS AND STARTING A BUSINESS

### How do you assess the extent to which childcare is provided in order to enable parents to seek and take up employment or further training?

(among those who have children)



### Are you considering opening your own business in the country of your current residence?



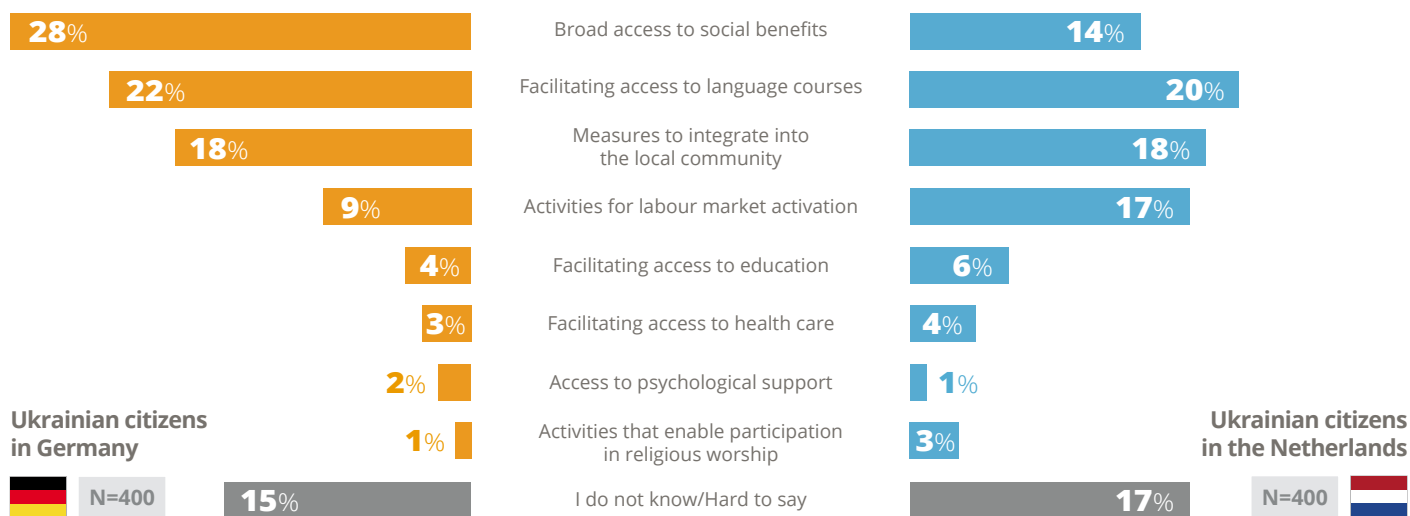
The survey reveals that a majority (54%) of Ukrainian citizens in Germany would readily recommend working there to their relatives and friends. Nearly one in five respondents (19%) says they would definitely recommend employment in Germany. The situation is similar in the case of the Netherlands, where more than half of Ukrainian citizens (56%) would be willing to recommend a job in that country, and more than a quarter of the respondents (27%) would definitely recommend employment in the Netherlands. Only 4% of Ukrainian citizens working in Germany and 3% in the Netherlands would not recommend employment in those countries.

The survey showed that 66% of Ukrainian citizens in Germany rated the extent to which childcare is

provided to enable parents to seek and take up employment or further training as definitely good or rather good. In the Netherlands it is 86%, with more than half of those surveyed (56%) rating this issue positively.

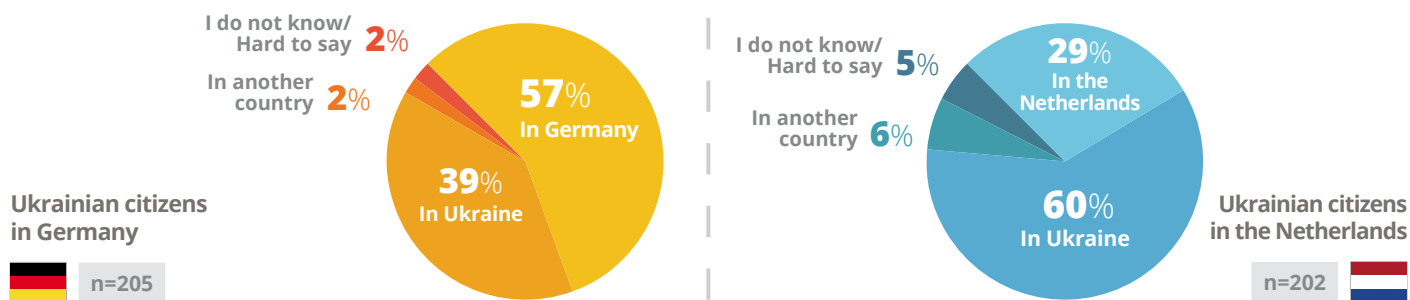
The majority of Ukrainian citizens staying in the Netherlands (80%) would not consider opening a business. Only 9% indicate such a possibility, with the most common choice being a business in the service sector (36%). In Germany two-thirds of Ukrainian citizens would not consider opening their own business in that country, with only 8% stating such a possibility. Those interested in starting their own business in Germany most often point to the service sector (28%), hospitality (24%), and construction (15%).

## In your opinion, what fosters integration of Ukrainian citizens in the country of current residence?

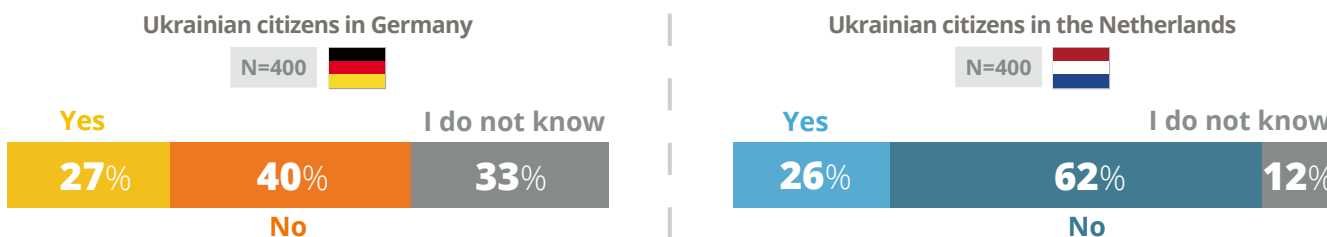


## In which country do you see a future for your children?

(among those who have children)



## Are your relatives going to join you in the country of current residence?



Nearly a third (28%) of Ukrainian citizens in Germany feel that easy access to social benefits aids their integration into their new home. Language courses are also seen as a key factor, valued by 22% of Ukrainians there. Integration into the local community is another important aspect, with 18% emphasizing its importance. In the Netherlands, one in five Ukrainians (20%) acknowledges that readily available language courses are the most helpful factor for integration. Similar to Germany, integration into the local community remains important (18%), followed by activities that help them enter the workforce (17%).

It is worth noting that more than half of Ukrainian citizens in Germany (57%) imagine a future for their children in Germany, while 39% see a future in Ukraine. The opposite is true for the Netherlands, where 29% of Ukrainian citizens indicated their current country of residence and more than half (60%) pointed to Ukraine.

In Germany, 40% of respondents reported that their families wouldn't be coming, while only 27% said they would. In the Netherlands, the trend is even stronger, with a significant 62% of Ukrainians indicating their relatives wouldn't relocate, compared to just 26% who said they would.

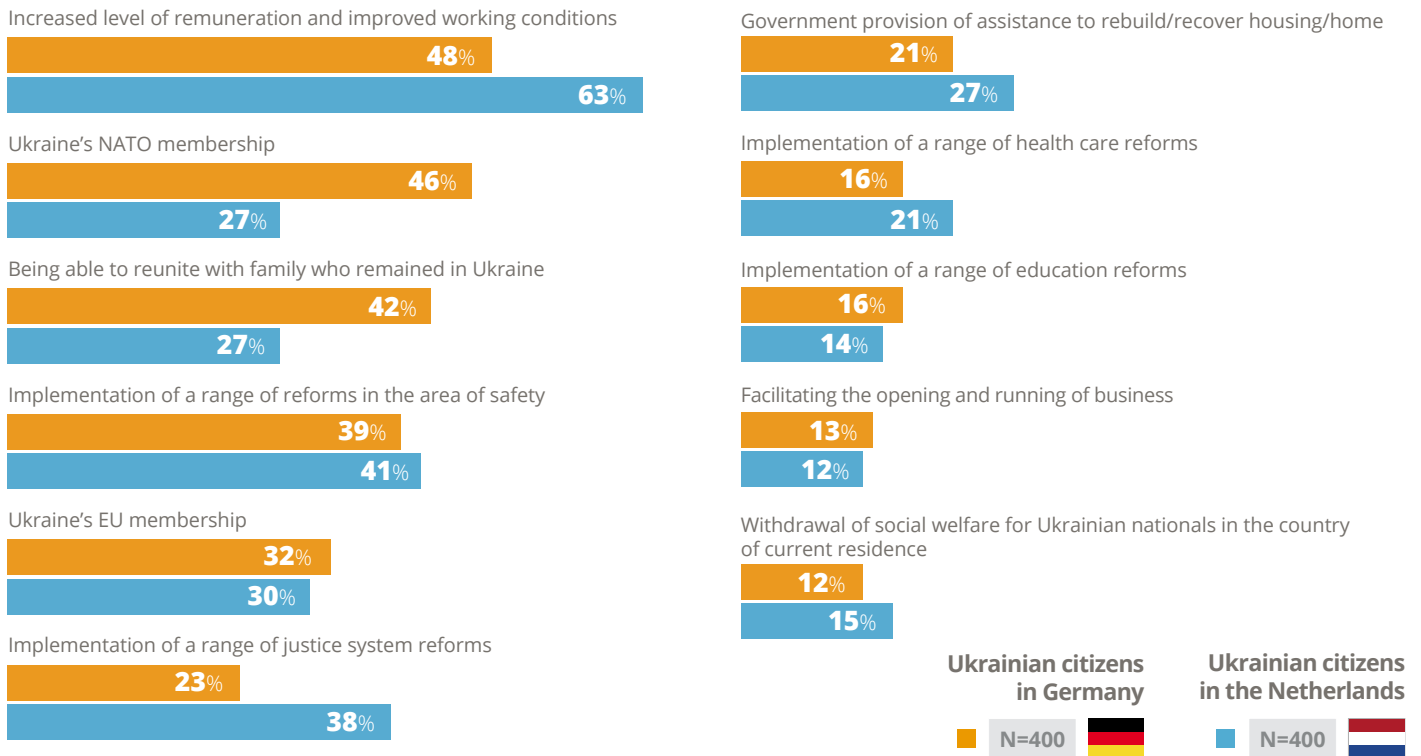
# MOTIVATIONS FOR STAYING IN GERMANY AND THE NETHERLANDS

## Are you planning to stay in the country of current residence for a longer period?



## What would most motivate you to return to Ukraine?

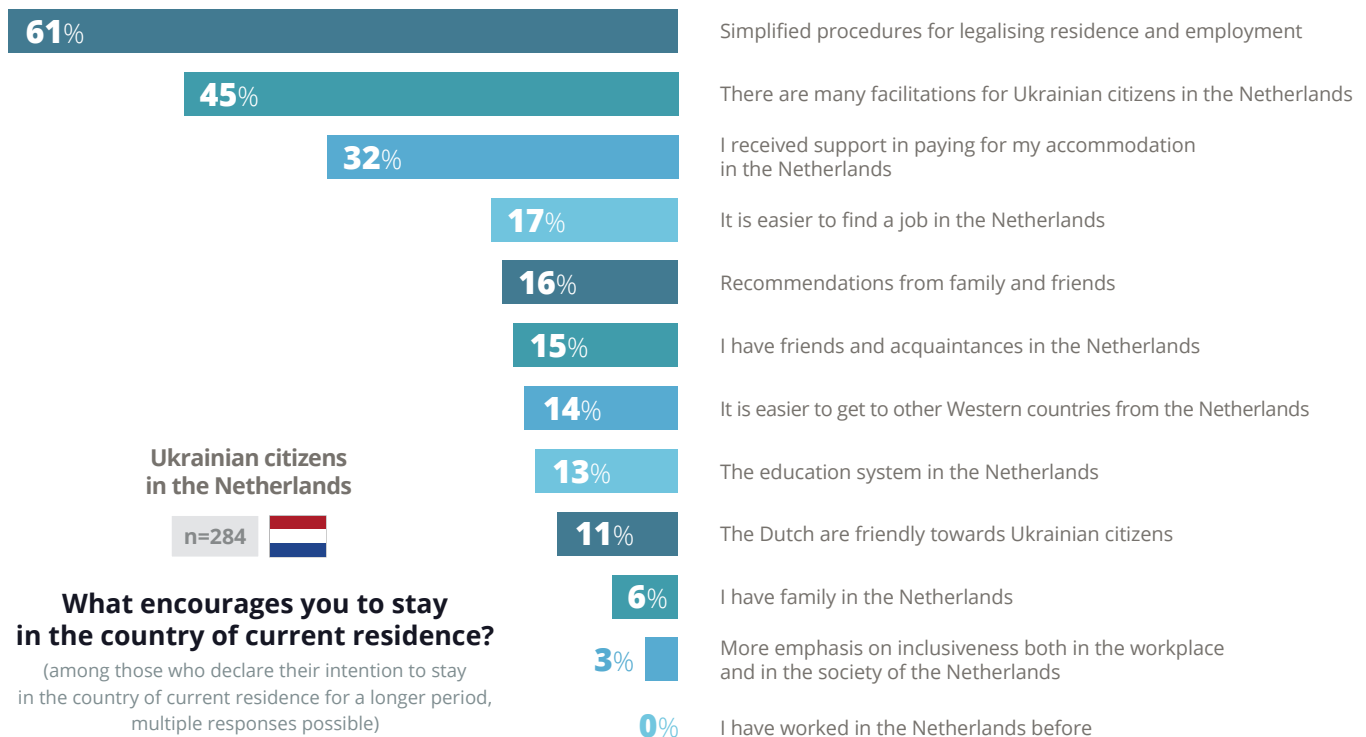
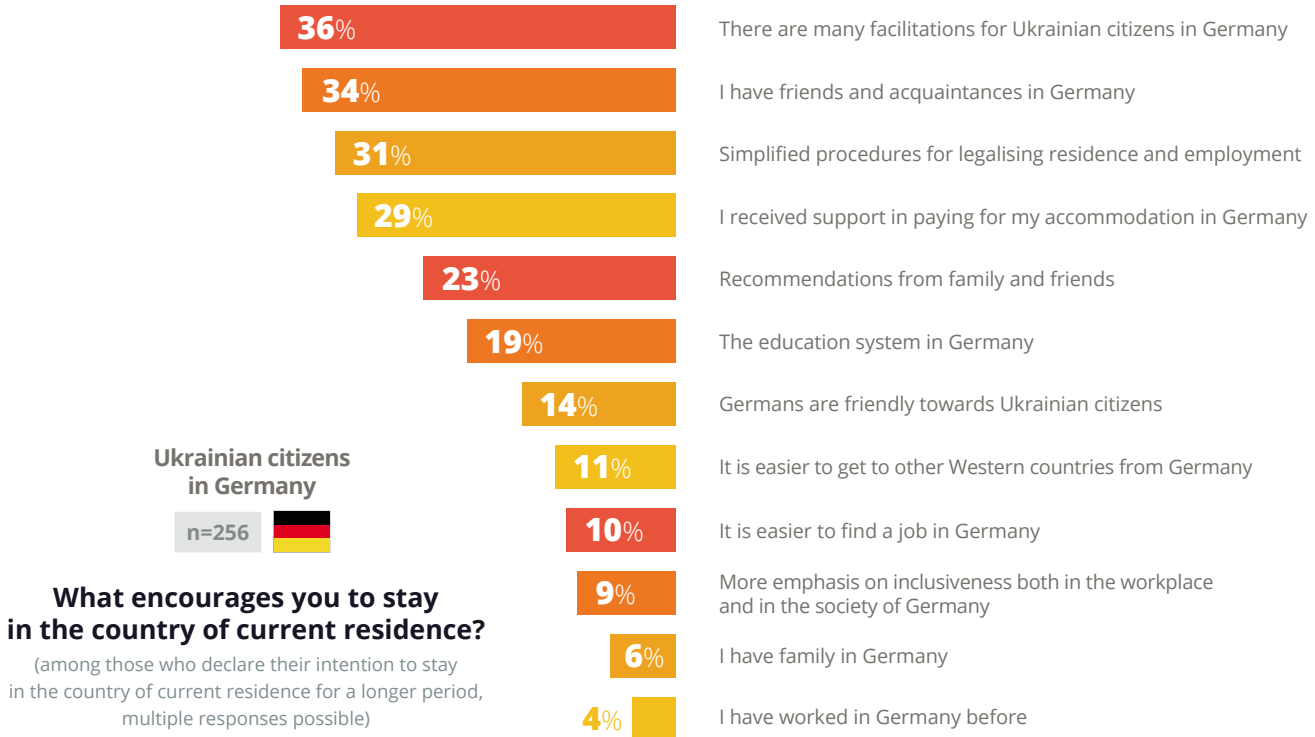
(multiple responses possible)



Almost one in three Ukrainian citizens in Germany (32%) intends to stay there for several years. In contrast, almost a quarter of the respondents (24%) plan to stay for at least one year. 8% of respondents communicated their intention to stay permanently. In the Netherlands 44% of Ukrainian citizens intend to stay in the country for several years. More than a fifth of respondents (21%) plans to stay for at least one year and only 6% plan to stay permanently. However, it should be noted that there is a significant percentage that is undecided (18% in Germany and 19% in the Netherlands) who have not yet made a decision whether to stay for a longer period in their current country of residence or to return to their home country.

Several factors could motivate Ukrainian citizens in Germany to return home. Nearly half (48%) mentioned higher pay and better working conditions in Ukraine as a reason. Additionally, the prospect of Ukraine joining NATO (46%) and the chance to reunite with family back home (42%) emerged as significant motivators. For Ukrainians in the Netherlands the most common motivations cited improved working conditions (63%), the implementation of reforms in the area of safety (41%) and the implementation of justice system reforms (38%).

# MOTIVATIONS FOR STAYING IN GERMANY AND THE NETHERLANDS

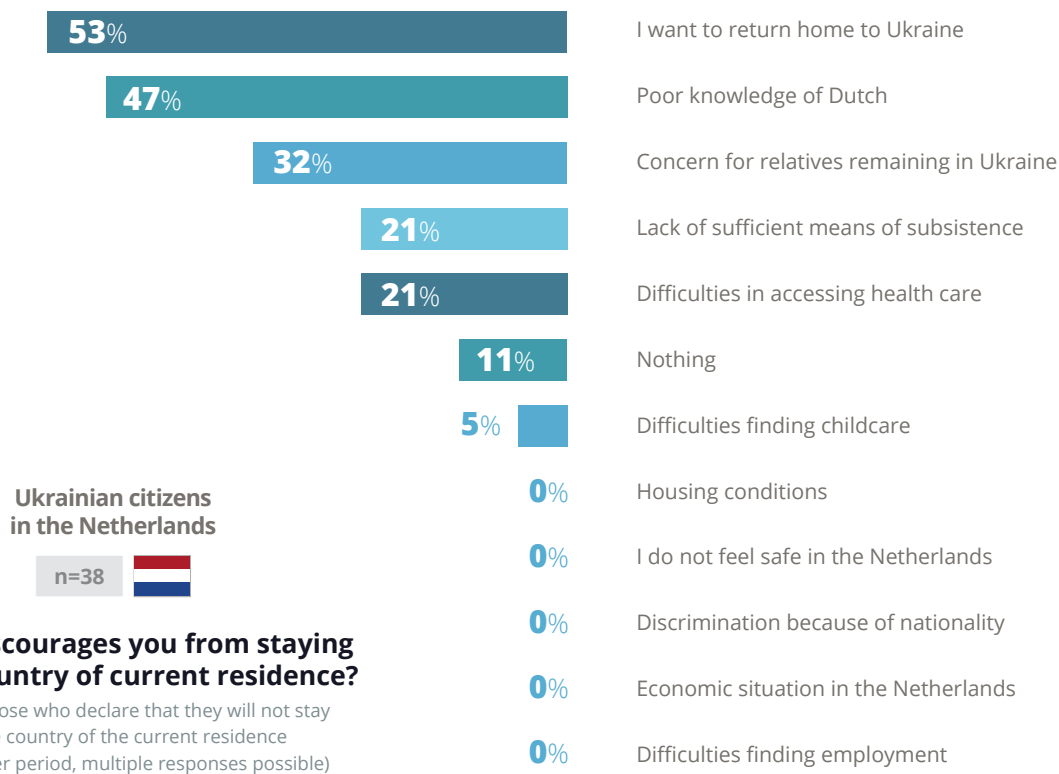
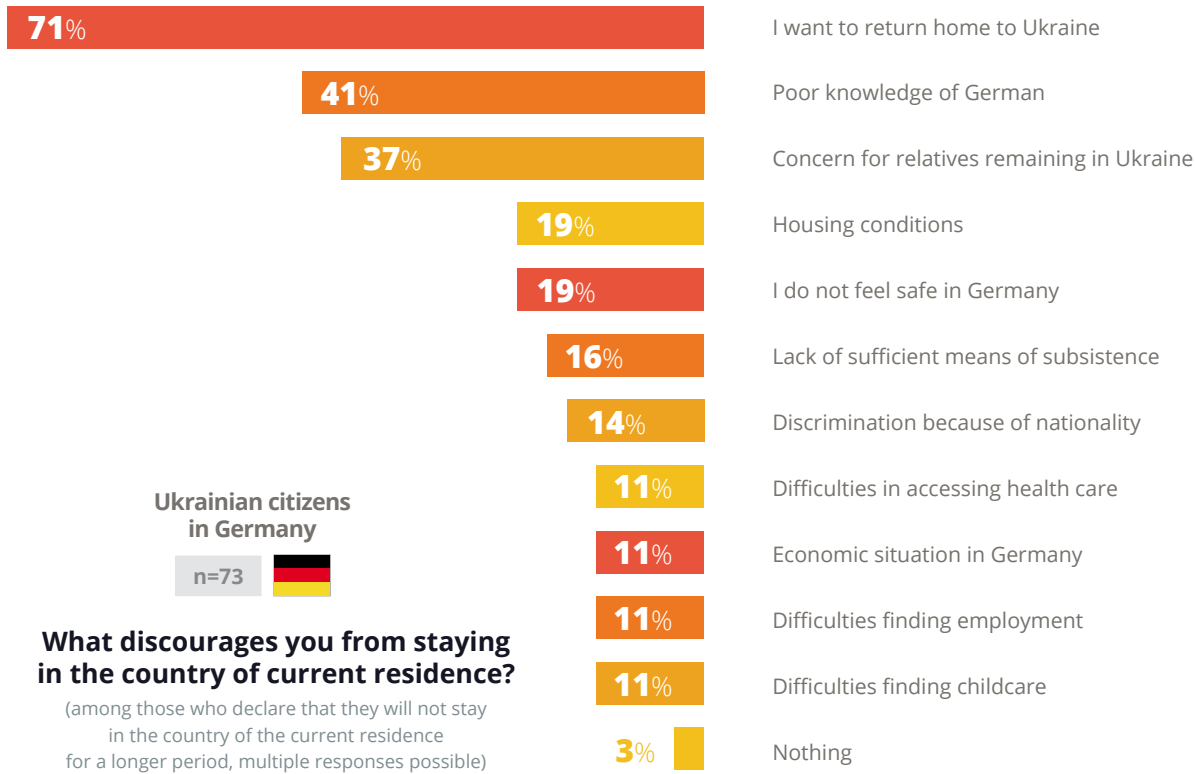


Among the reasons motivating them to stay in Germany, Ukrainian citizens point to: facilitation for Ukrainian citizens in the host country (36%), the presence of relatives and friends (34%), simplified process for legal residency and work permits (31%) and assistance with housing costs (29%). Among the

reasons motivating them to stay in the Netherlands, Ukrainian citizens mention: simplified procedures for the legalisation of residence and employment (61%), facilitation for Ukrainian citizens in the host country (45%) and coverage of accommodation costs in the Netherlands (32%).



# MOTIVATIONS FOR STAYING IN GERMANY AND THE NETHERLANDS



Among the reasons that discourage Ukrainian citizens from staying in Germany and the Netherlands are: the desire to return home to Ukraine (71% in Germany, 53% in the Netherlands), poor knowledge

of the language of the host country (41% in Germany, 47% in the Netherlands), and concern for relatives remaining in their home country (37% in Germany, 32% in the Netherlands).



## MICHALINA SIELEWICZ

International Development  
Director at the EWL Group

### NINEFOLD INCREASE IN THE NUMBER OF UKRAINIANS IN GERMANY AND FOURFOLD IN THE NETHERLANDS

The war in Ukraine is still going on and the number of Ukrainian refugees in the European Union continues to grow. It is unclear when the conflict will end, which poses a challenge of helping the refugees who are constantly arriving in our countries. Before the Russian aggression there were about 140,000 Ukrainian citizens in Germany. Today, their number has increased more than eightfold, reaching more than 1.2 million people and making Ukrainians the second largest immigrant group in Germany. A similar situation can be observed in the Netherlands. Before the war the number of Ukrainian nationals there was about 30,000, whereas today it is almost four times as many, amounting to almost 120,000.

### HIGH QUALIFICATIONS OF UKRAINIAN CITIZENS ARRIVING IN EU COUNTRIES

Our survey has shown that Ukrainian nationals staying in Germany and the Netherlands, both war refugees and labour migrants, are highly skilled – about three-quarters have a university degree. It speaks of a significant potential they can bring to the local labour markets, which are in demand of specialized knowledge and skills from job candidates. Moreover, the data is significant in the context of a shortage of specialists in many key industries, such as IT, engineering and health care, which both Germany and the Netherlands are facing. **Let us add that the number of vacancies in the German labour market is estimated at up to 2 million and in the Netherlands at 400,000. After the economic slowdown in 2023 and 2024, most analysts expect the German and Dutch economies to grow by about 1.5% in 2025, so the demand for workers will be even higher.**

### KNOWLEDGE OF ENGLISH AND LANGUAGES OF HOST COUNTRIES

It is worth noting that the majority of Ukrainian citizens declare knowledge of foreign languages, including English, which enhances their ability

to communicate and cooperate effectively in an international work environment. This is confirmed by the numbers – more than half of the respondents declare knowledge of English. In addition, more than a third of the refugees in Germany and more than half of the refugees in the Netherlands can communicate at work in the local languages, a promising indicator of their ability to adapt and then integrate. Among the barriers to finding a job, poor language skills scored only a few percent. **This means that Ukrainian immigrants are quick learners and can provide important support to local labour markets, helping to reduce labour shortages in many industries and to strengthen economic growth. This is a situation familiar from other European Union countries, including Poland, but not only. Germany and the Netherlands are also likely to maintain the gains associated with legal labour migration. So is Spain, where immigrants, mainly from Latin America, accounted for half of the economic growth in 2023.**

### LANGUAGE COURSES FACILITATE INTEGRATION AND PROFESSIONAL DEVELOPMENT OF UKRAINIAN CITIZENS

Language remains a key hurdle for Ukrainian refugees, with 41% and 47% in Germany and the Netherlands, respectively, citing it as a challenge. While their lack of language skills does not discourage them from taking up employment, it may influence their decision to stay in Germany or the Netherlands for the long term. Another problem is the lack of means to support themselves (16% and 21%), resulting from difficulties in finding employment in the new country, as well as difficulties related to the availability and quality of health care (11% and 21%). **It is therefore crucial to provide widely available language courses to facilitate integration, eliminate many of the livelihood problems, and increase the chances of a longer stay, stable employment and professional development.**

### HIGH DESIRE TO FIND EMPLOYMENT IN EU COUNTRIES AMONG UKRAINIANS

Despite their high level of education and desire to find work, not all Ukrainian refugees are professionally active. In Germany, two-thirds of the respondents declare employment, while in the Netherlands the percentage is 61%. In contrast, the willingness to work in Germany and the Netherlands is confirmed by respectively 13% and 4% of professionally inactive respondents. However, there is a significant group of people who do not participate in the labour market mainly for reasons such as the use of financial aid

from host countries and childcare responsibilities. This points to the need of supporting these people, so that they can make the most of their competencies and contribute to the economies of Germany and the Netherlands. It is of importance that among working Ukrainian citizens the biggest barriers to employment were: a lack of job opportunities for Ukrainians (15% and 34%) and insufficient skills (31% and 21%). **We therefore call for an increase in the number of work offers dedicated to Ukrainian citizens, as well as the provision of courses to improve their professional qualifications. Especially, bearing in mind the fact that Ukrainian citizens are ready to participate in such courses, either paying for them themselves or sharing the costs with the employers, which shows high determination of those immigrants.**

## UKRAINIAN CITIZENS WILL STAY LONGER IN GERMANY AND THE NETHERLANDS BUT NOT PERMANENTLY

We should add that many Ukrainian refugees express a desire to stay in Germany and the Netherlands for a few years (32% and 44%), which could be a positive signal for the local labour markets. At the same time the percentage of respondents who wish to return to Ukraine, either as soon as possible or after a year in Germany and the Netherlands (40% and 26%), is several times higher than that of the respondents wishing to stay in those countries forever (8% and

6%). The majority of Ukrainian citizens in Germany see a future for their children in this country (57%), compared to the Netherlands, where that number drops to 29%. **Several factors are seen as crucial for integration: access to social benefits (28% and 14%), language courses (22% and 20%), integration into the local community (18% and 18%), and labor market activation programs (9% and 17%).**

## LET'S UNLOCK THE PROFESSIONAL POTENTIAL OF UKRAINIAN CITIZENS

Ukrainian citizens in Germany and the Netherlands possess high levels of education and vocational skills. However, their potential isn't being fully utilized. This report aims to identify the challenges and opportunities that influence their situation. Understanding their needs and expectations will allow us to develop better integration strategies, including job training programs.

**TENT, a global organization dedicated to refugee integration through work (of which EWL has been a proud member since 2022), echoes the powerful sentiment of its founder, Hamdi Ulukaya: „The minute a refugee gets a job is the minute they stop being a refugee.” Employment empowers refugees with security, dignity, and independence – essential for a new life abroad.**

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## TENT PARTNERSHIP FOR REFUGEES

**The Tent Partnership for Refugees was launched in 2016 by Hamdi Ulukaya, the CEO and founder of Chobani – a multibillion dollar food company in the U.S. – to mobilize global businesses to help connect refugees to work. Today, Tent is an international network of over 400 major companies committed to hiring, training, and mentoring refugees, including in Germany and the Netherlands.**

Germany has welcomed over one million Ukrainian refugees, while the Netherlands has welcomed 120,000, many of whom are highly skilled women. As this latest survey from EWL confirms, unfortunately a large number of Ukrainian refugees remain unemployed in both countries.

Ukrainians face numerous hurdles when trying to find work – including language barriers, lack of social

or professional networks, limited understanding of the local job market, and childcare burdens. Businesses have a critical role to play to help refugees overcome these barriers. Tent supports and advises major companies across Europe with their refugee hiring and integration efforts.

To date, Tent members have pledged to help hundreds of thousands of refugees enter the labour market.

If you are interested in finding out more about Tent's work in your country, please get in touch with the Director of Tent Deutschland, Christian Schmidt, at [christian@tent.org](mailto:christian@tent.org) or the Director of Tent in the Netherlands, Hélène van Melle, at [helene@tent.org](mailto:helene@tent.org).



TENT

## METHODOLOGY

To understand the experiences of Ukrainian citizens in Germany and the Netherlands, a survey of Ukrainian citizens residing in Germany and the Netherlands was conducted using a hybrid approach: online CAWI interviews and F2F interviews. Interviews were conducted in Ukrainian in March 2024, from the 18th to the 30th, on the following samples: n=400 adult (18+) Ukrainian citizens currently residing in Germany and n=400 adult (18+) Ukrainian citizens currently residing in the Netherlands. The study included all Ukrainian citizens residing in these countries, both labour migrants and war refugees.

The survey was conducted with Ukrainian citizens in various cities in Germany, including: Berlin, Munich, Frankfurt, Cologne, Düsseldorf, Bonn, Essen, Bamberg, Bremen, Hamburg, Hanover, Dinslaken, Dortmund,

Dresden, Karlsruhe, Lübeck, Mainz, Nuremberg, Pforzheim, Geldern, Chemnitz, Stuttgart, Münster, Mönchengladbach, Ulm, Voerde, Wuppertal.

The survey was conducted with Ukrainian citizens in various cities in the Netherlands, including: Amsterdam, Rotterdam, The Hague, Utrecht, Groningen, Almere, Eindhoven, Tilburg, Breda, Haarlem, Leiden, Leeuwarden, Dordrecht, Arnhem, Nijmegen, Apeldoorn, Enschede, Zwolle, Den Bosch, Maastricht, Zaandam, Heerlen, Alkmaar, Amersfoort, Sittard, Geleen, Assen, Emmen.

The survey was random, which ensured its representative character. The cross-sectional character of the respondents is confirmed by the fact that they included representatives of different age groups, professions and education levels.



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## EWL GROUP

One of the fastest growing companies in the employment sector in the EU, which successfully connects candidates from five continents (Europe, Asia, Africa, North and South America) with European employers. The company is gradually increasing the number of countries from which job candidates come, and is implementing technological solutions that aim to further digitalise the recruitment, employment legalisation and accommodation of employees.

Since its founding in 2007, the company has helped more than 170,000 people from 28 countries to find employment with more than 1.6 thousand employers in EU countries.

As a global migration platform, EWL uses dedicated AI technology in its operations, which quickly and

effectively matches candidates with employers, taking into account the skills and experience of potential employees.

The development of the Migration Platform has been supported since 2021 by the National Centre for Research and Development. Since 2018 EWL has been conducting sociological studies among foreigners who have taken employment in the EU.

EWL is guided by the values of: openness, cooperation and responsibility, being fair, challenging the status quo and customer focus. The company's mission is to structure issues related to global mobility by eliminating the barriers facing millions of candidates around the world, to connect jobseekers with the best employers and to provide a transparent employment process.

## FOUNDATION FOR THE SUPPORT OF MIGRANTS ON THE LABOUR MARKET 'EWL'

Founded in 2015, the Foundation for the Support of Migrants on the Labour Market 'EWL' aims to initiate and support activities related to the presence of foreigners on the Polish labour market.

Our idea is to raise awareness of rights and obligations and the benefits of legal employment among foreigners, as well as to limit the abuse by dishonest employers. One of the main objectives of the Foundation is to improve multilateral cooperation between employers, government institutions,

non-governmental organizations and migrants themselves.

Following the start of the Russian invasion of Ukraine, the Foundation in cooperation with EWL clients and volunteers initiated a number of aid activities, including the "Backpack to Ukraine" campaign (120 transports of humanitarian aid) or the Mother and Child Point at Warsaw's Zachodni Railway Station, where over 100,000 refugees have found shelter, rest and first aid.



## THE CENTRE FOR EAST EUROPEAN STUDIES AT THE UNIVERSITY OF WARSAW

The Centre for East European Studies is a unique academic unit in Poland, continuing the traditions of pre-war Sovietological centres – the East European Institute in Vilnius (1930–1939) and the Eastern Institute in Warsaw (1926–1939). The teaching offer of the Centre includes elite Eastern Studies (1st and 2nd degree and postgraduate courses) as well as schools for foreign students. The lecturers are eminent scientists, diplomats and specialists from Europe and the USA.

The Centre annually organizes international scientific conferences and a series of events building positive relations between Poland and the countries of the

former USSR. It is also the publisher of numerous books and magazines devoted to the eastern themes.

In the years 2004–2013, the Centre for East European Studies, under the content-related supervision of Mariusz Kowalski and the general management of Jan Malicki, conducted a series of social studies in Ukraine. The first of them took place in December 2004. A total of about 2,000 questionnaire interviews was carried out, pertaining issues such as political views and preferred directions of international cooperation, with particular emphasis on the place of origin, nationality and language of the respondents' daily communication.



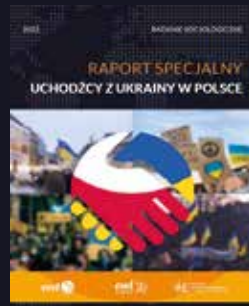


2024



2023

# EWL GROUP REPORTS 2014-2018



2022



2020-2021



2018-2019



## REPORT 'UNLOCKING THE POTENTIAL: UKRAINIAN CITIZENS IN GERMANY AND THE NETHERLANDS'

A survey by EWL and the Centre for East European Studies at the University of Warsaw  
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### AUTHORS:

Anatoliy Zymnin (project leader), Mariusz Kowalski PhD (social geographer, content-related supervision), Michalina Sielewicz, Sylwia Kowcuń, Szymon Bryzek, Margaryta Sytnik, Marharyta Nesterenko, Tomasz Malinowski, Natalia Bugnacka (content editor), Alicja Żurawska (graphic design and prepress)

### CONTACT:

Anatoliy Zymnin  
Spokesperson  
+48 535 888 815  
[anatol.zymnin@ewl.com.pl](mailto:anatol.zymnin@ewl.com.pl)

### CONTACT:

Michalina Sielewicz  
International Development  
Director  
+48 517 571 953  
[michalina.sielewicz@ewl.com.pl](mailto:michalina.sielewicz@ewl.com.pl)