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UKRAINE: FROM WAR TO PEACE AND RECOVERY

Analytical Assessments
November 2023



I.

NATIONAL SECURITY AND DEFENCE: KEY DEVELOPMENTS, PROCESSES, TRENDS

By the end of November 2023, the Russia-Ukraine war had entered another phase described by many observers as a «strategic impasse», «parity of combat capabilities», «positional confrontation», and the like. At present, neither warring party – despite tactical successes in certain areas – has a strategic initiative in the entire theatre of operations.

It should be acknowledged that the first signs of a positional nature of fighting emerged already at the beginning of the summer campaign, when the Ukrainian offensive faced an insurmountable obstacle – the combination of modern technologies and dense minefields. In turn, Russia's attempt to capture Avdiivka in early October only confirmed its inability to seize the strategic initiative. Therefore, the «deadlock» situation, which the Ukrainian side publicly acknowledges, equally applies to Russia's prospects to achieve the declared goals of the so-called SVO («special military operation»), despite the Kremlin's bravura statements.

COMBAT ACTION

In November 2023, Russian troops significantly intensified their counteroffensive actions along the entire front line. According to the Ukrainian General Staff, there have been 100+ engagements every day, while Ukrainian defenders' actions are mainly of active defence. Meanwhile, the Ukrainian forces continued their offensive in the Melitopol sector. On 17 November, the General Staff finally confirmed the presence of Ukrainian forces on Dnipro's left bank in the Kherson region – they held and expanded the bridgehead reported in October after a series of successful reconnaissance and sabotage raids.

The most intense clashes took place in and around Avdiivka, where Russians achieved

tactical success but – despite their military command's willingness to sacrifice personnel and equipment to meet the declared goals – failed to fully capture or encircle the Avdiivka fortified area during almost two months of intense assault operations using heavy equipment and aircraft. In contrast to obvious military and tactical importance of controlling Avdiivka for Ukrainian forces, Russian persistence is largely driven by political considerations.

With the start of the presidential campaign in Russia approaching, Putin needs to periodically showcase the achievements of the so-called SVO to his electorate, even despite the absence of signs of any anti-war protest sentiment in Russia. It is noteworthy that public expressions of dissatisfaction by families of mobilised Russians rarely include in an anti-war context.

UKRAINIAN GOVERNMENT'S POLICY DECISIONS AND ACTIONS IN THE DEFENCE SECTOR

Against the backdrop of ongoing hostilities and the apparently disappointing results of the summer and autumn offensive campaign, there are signs of an escalation of not only internal political battles, but also conflictual relations between Ukraine's political leadership and the high military command.

Back in the summer, the first reports of disagreements between President Volodymyr Zelenskyy and the Commander-in-Chief General Valeriy Zaluzhnyi were denied quickly and convincingly.

President's reaction to General Zaluzhnyi's recent interview with the Economist not only confirmed the existence of the conflict, but also revealed its severity. The President publicly

disagreed with the Commander-in-Chief's assessment of the military situation and then warned him to deal with military affairs and stay out of politics.

On 3 November, President Zelenskyy dismissed General Viktor Khorenko from the post of Commander of the Special Operations Forces. The decision was made bypassing the Commander-in-Chief, General Zaluzhnyi. While not being a violation of the procedure, this act by the Presidential Office was assessed by the military and expert community as a manifestation of disrespect for the military, disruption of General Zaluzhnyi's authority and even the possibility of his dismissal from the post of Commander-in-Chief. One of reasons for such an act could have been two much talked-about publications in Times and The Economist that appeared in late October and early November.

The publicity of the conflict at the President – Commander-in-Chief level is only the tip of the iceberg of problems in civil-military relations during the active phase of the war, especially amidst the search for those responsible for failures. There is speculation that the ongoing investigation dubbed «Who Surrendered the South?» is aimed at shifting the full responsibility onto the military.

In addition to high-level civil-military relations, a number of other problems with increasing publicity, such as social and legal protection of military personnel and their families, as well as mobilisation and demobilisation under martial law, remain unresolved. Also, one cannot rule out the threat of targeted information influence by the enemy aimed at fuelling dissatisfaction with the government actions and stimulating protest moods.

Meeting the defence forces' needs in human resources is one of the most pressing problems today. Defence Minister Rustem Umerov has approved the Concept of Military Personnel Policy until 2028. According to MoD, this document defines a «strategic vision for the development of military personnel

policy in the defence sector» both in wartime and in peacetime. The concept indeed covers important aspects of personnel management at all stages, from recruitment to demobilisation. At the same time, it is hard to tell how much this document will contribute to addressing the existing problems of manning the defence forces, which are becoming increasingly urgent with the war entering a protracted and uncertain stage.

Going back to General Zaluzhnyi's article in The Economist, it should be noted that his assessments of the situation and proposals received extremely positive feedback both inside and outside Ukraine. One of his main theses is the need for fundamental changes in the strategy of achieving victory – a strategy that takes into account the experience gained, strengths and weaknesses of both sides of the conflict.

FOREIGN EVENTS (EXTERNAL FACTORS)

The war in the Middle East and the ongoing domestic political crisis in the United States remained the key foreign policy factors influencing the course of the Russia-Ukraine war. Although the Israeli-Palestinian conflict was firmly in the forefront of the global media agenda, the Russia-Ukraine war still remained near the top of the global agenda. There was also more certainty about both conflicts' mutual influence, in particular as a result of polarisation between supporters of the parties to the Israeli-Palestinian conflict and, accordingly, the risk of a split in the pro-Ukrainian coalition. It should be added that the fact of more than 50 states participating in the Ramstein meeting on 18 November, as well as the outcome of the meeting of the Defence Contact Group, are quite encouraging in terms of maintaining military support for Ukraine.

November 2023 was perhaps the biggest test for the US assistance, which became hostage to domestic political and budgetary problems. Although the worst-case scenario did not materialise this time, Ukraine and its European partners received another signal about the need to plan long-term support in

countering Russian aggression, taking into account the risks of reduced American aid.

An analysis of the most important events, political statements and decisions leads to the following conclusions:

- ✓ as of the end of November 2023, the situation in the theatre of operations of the Russia-Ukraine war shows features of a «strategic impasse», where neither side has a strategic initiative, while the irreconcilability of positions excludes the possibility of a diplomatic settlement;
- ✓ the increasingly obvious prospects of prolonging the hostilities pose significant risks to Ukraine, given the enemy's resource advantages and Ukraine's critical dependence on external support;
- ✓ further aggravation of the internal political confrontation and conflict between the political leadership and the high military command creates high risks of internal destabilisation;
- ✓ there is an urgent need for fundamental changes in the strategy for achieving military victory, based on a realistic assessment of the situation and taking into account one's own strengths and weaknesses and those of the enemy.



II. FOREIGN POLICY

November 2023 was filled with multidirectional foreign policy events at the global and regional levels, contradictory trends with challenges and opportunities for Ukraine. The European Commission's recommendation to start EU membership talks with Ukraine was undoubtedly the event of the month. At the same time, the nature of internal processes in some of Kyiv's important allies causes concern and poses a risk of limiting support and assistance to Ukraine in its fight against the aggressor and, in general, threatening the unity and solidarity of the collective West.

INTERNATIONAL PROCESSES AND EVENTS

Ukrainian diplomacy focused on priority tasks, such as ensuring conditions for resistance to the aggressor, intensifying European and Euro-Atlantic integration, accelerating the negotiation process on security agreements, promoting Ukrainian initiatives (the Peace Formula) on the global stage, etc.

International processes

When assessing the nature and peculiarities of international processes, one can observe a number of unfavourable trends that could affect both bilateral relations and Ukraine's external position.

The situation around the adoption of the temporary US federal budget is one of such alarming trends. The Republican-controlled House of Representatives blocked President Biden's request for support for Ukraine and removed military aid from the temporary budget, which was eventually passed by the Senate and signed by the President. On the one hand, this slows down military support for Kyiv, and on the other hand, it sends a bad signal to other Ukraine's allies. Moreover, complications with US military assistance only encourage the aggressor.

In turn, the victory of the populist Party for Freedom (PVV) in the November parliamentary

elections in the Netherlands may be a challenge for the EU and a problem for Kyiv's European integration, as the party leader Geert Wilders does not support further arms transfers to Ukraine, opposes EU enlargement and stands in solidarity with the destructive policies of Hungary's Viktor Orban. In this context, it is worth recalling that in October 2023, the new government of Slovakia was headed by pro-Russian populist Robert Fico, who also announced the termination of military assistance to Ukraine and talked about the ineffectiveness of EU sanctions against Russia. This trend of populist, Eurosceptic forces coming to power in some European countries generally threatens the EU's political stability and solidarity, as well as its common foreign policy. Therefore, there is a threat of blocking the EU's assistance to Kyiv in countering Russian aggression and Ukraine's European integration.

Another dangerous trend concerns temporary complications in Ukraine's relations with individual EU states. On 6 November, Polish carriers blocked a number of checkpoints on the Ukrainian-Polish border, demanding the restoration of the old system of permits for Ukrainian carriers to work in the EU, which is unacceptable to Ukraine. Slovak transport workers also plan to join the blockade. As of the end of November, the losses incurred by Ukraine's economy due to the long-lasting transport crisis on the Ukrainian-Polish border amounted to more than €400 million.

Foreign policy events

On 7 November, NATO members condemned Russia's decision to withdraw from the Treaty on Conventional Armed Forces in Europe (CFE) and announced their intention to suspend their participation in it indefinitely. NATO's statement reads: «...a situation whereby Allied States Parties abide by the Treaty, while Russia does not, would be unsustainable. Therefore, as a consequence, Allied States Parties intend to suspend the operation of the CFE Treaty for as long as necessary...».

On 8 November, the European Commission adopted its 2023 Enlargement Package recommending the European Council to start accession negotiations with Ukraine, Moldova, Bosnia and Herzegovina and to grant candidate status to Georgia, taking into account the implementation of its recommendations. In particular, the European Commission's decision contains proposals to approve a framework for negotiations subject to Ukraine taking certain steps (strengthening activities of the NABU and NACP, adopting a law on lobbying, implementing the Venice Commission's June and October 2023 recommendations to laws on national minorities, the state language, media and education).

On 13 November, the EU Foreign Affairs Council met in Brussels with the participation of Ukrainian Foreign Minister Dmytro Kuleba. The meeting participants discussed the EU's long-term security commitments to Ukraine, joint steps by Kyiv and Brussels to open membership talks, the Ukrainian Peace Formula, etc.

On 15 November, the US and China leaders met on the side-lines of the Asia-Pacific Economic Cooperation summit in San Francisco. According to Joe Biden, «important progress» was made, in particular in restoring dialogue between the military, in the fight against drugs, and in cooperation in the field of artificial intelligence, etc. However, it is too early to talk about any «breakthroughs», including on the Ukrainian direction.

On 16 November, the 62nd session of the PABSEC General Assembly took place in Kyiv. Members of the organisation adopted a final Declaration expressing solidarity and support for Ukraine, supporting the establishment of a special tribunal to investigate crimes of Russian aggression, and condemning the Putin regime's aggressive policy in the Black Sea region.

On 22 November, countries of the Ramstein group met for the 17th time. The meeting participants announced their further military assistance to Ukraine, as well as the decision to set up a new Germany and France-led Ground-Based Air Defence coalition, which brings together 20 countries.

On 29 November, at a meeting of the NATO-Ukraine Council at the level of foreign

ministers, Ukraine presented its Annual National Programme for 2024 to prepare for the country's accession to the Alliance, which included security, energy, humanitarian and other components. NATO provided Ukraine with recommendations for priority reforms, including fighting corruption, strengthening the rule of law, and supporting human and minority rights.

FOREIGN POLICY ACTIVITIES OF UKRAINIAN GOVERNMENT

Political dialogue with foreign partners

An intense political and diplomatic marathon continued in November. High-level contacts included negotiations with President of the European Commission Ursula von der Leyen, President of the European Council Charles Michel, as well as Presidents Alain Berset (Switzerland), Edgars Rinkēvičs (Latvia), Maia Sandu (Moldova), Andrzej Duda (Poland), Javier Milei (Argentina), Joko Widodo (Indonesia), and Santiago Peña Palacios (Paraguay). No less important were the consultations with Prime Ministers Justin Trudeau (Canada), Giorgia Meloni (Italy), and Fumio Kishida (Japan). A dialogue continued with diplomats and government officials from France, Italy, United Kingdom, Paraguay, the Philippines, Chile, and representatives of international financial institutions.

Inter-parliamentary contacts were also maintained. An important event in this context was the visit to Ukraine of a representative delegation of the parliaments of Belgium, Ireland, Finland, the Czech Republic, Estonia, Poland, and the NATO PA.

Ukraine's activity on the American direction deserves particular attention given the aforementioned internal trends in the United States. A series of meetings were held with government officials and top managers of a number of leading US corporations. In November, a Ukrainian delegation led by the head of the Presidential Office, Andriy Yermak, visited the United States and held talks with members of Congress, politicians, businessmen, experts, etc. In the meantime, the intensity of negotiations with the military leadership of partner countries increased during the month. Meetings were held with the Ministers of Defence of the United States, Germany, Lithuania, the Netherlands, the Chief of the EU Military Staff, etc.

As part of traditional diplomatic procedures, the President of Ukraine accepted credentials from the new ambassadors of the Czech Republic, Turkey, Luxembourg, South Africa, Bangladesh and Guinea.

Promotion of Ukrainian interests and initiatives globally

Official Kyiv focused on defending its positions, promoting national interests and lobbying for topical issues in the bilateral format at various international platforms and public events. *First*, Ukraine took part in various international forums, including the 33rd Assembly of the International Maritime Organization, the Halifax Security Forum, the 42nd session of the UNESCO General Conference, the conference «United for Justice: War Crimes against Ukrainian Children», the third Paris Peace Forum, etc. The Ukrainian President's speeches at the Reuters NEXT conference and the German-Ukrainian Conference of Municipal Partnerships also fall within this category. *Second*, Ukraine organised targeted public events aimed at different audiences, in particular a) interviews for African media (Angola, Botswana, Tunisia, Guinea, Kenya, South Africa, Morocco, Nigeria, Zambia); b) President Zelenskyy's speech to students and teachers of educational institutions in Mexico; c) public events to open the Ukrainian Institute's representative office in Paris. *Third*, Ukraine focused efforts on holding a regular meeting of national security advisers in December 2023 to organise the Global Peace Formula Summit. At the same time, the Ukrainian side held an international summit of the Grain from Ukraine initiative in Kyiv, which is supported by a number of countries.

UKRAINE'S STEPS TOWARDS THE EU: EVENTS AND TRENDS

As for Ukraine's European integration, the aforementioned recommendation of the European Commission to start talks with Ukraine on EU accession was an event of strategic significance. Another important supporting signal was the statement of the Conference of Presidents of the European Parliament of 28 November, which called on the European Council to start accession negotiations with Ukraine.

Other November events, however, revealed a number of problematic factors and challenges to Ukraine's European integration. In particular, the Hungarian leadership launched a campaign to resist and discredit Ukraine's accession to the EU. Moreover, the positions of Slovakia and the Netherlands are worrisome in terms of internal processes.

The Ukrainian side focuses its efforts on minimising negative factors and ensuring the implementation of the European Commission's recommendations, including by holding talks and consultations with the EU leadership and a number of European countries. Kyiv developed a detailed roadmap for resolving minority issues, consistently emphasised by official Budapest, and handed it over to Hungary. A number of measures were taken to address pressing issues of European integration: a) an advisory group of experts started working to select candidates for the position of the Constitutional Court judges; b) the High Qualification Commission of Judges of Ukraine resumed the qualification assessment of judges for their suitability for the position; c) on 8 November, the President signed a decree «On some measures to prepare for the negotiation process on Ukraine's accession to the European Union», setting out tasks to implement the European Commission's recommendations, create organisational conditions for the negotiation process, approve a new national programme for adapting Ukrainian legislation to EU law, improve coordination of various government bodies in the field of European integration, etc.

The multidirectional events of November may send some positive signals for Ukraine but also exacerbate existing conflicts and create new challenges. The toughest of them are obviously internal trends and processes in some of Ukraine's allies that threaten to limit their support and assistance in countering russian aggression. At the same time, more joint efforts by Kyiv and its partners are needed to overcome the existing challenges and difficulties on Ukraine's path to the EU. Ukrainian diplomacy must adapt to the complex realities of today's world, maintain and strengthen solidarity and partnership on the path to the EU and NATO.



CONSTITUTIONAL AND LEGAL FIELD

LEGISLATION

The last months of a year are expectedly productive in the Verkhovna Rada activities. November 2023 was no exception, as more than 50 acts adopted by the Parliament, including 11 laws of Ukraine, entered into force during this month. Traditionally for the year end, legislative regulations / improvements concerned both general issues of proper functioning of state and local authorities, and human rights promotion and protection (the Laws «On the State Budget of Ukraine for 2024», «On Amendments to the Law of Ukraine 'On Ensuring the Rights and Freedoms of Internally Displaced Persons' concerning Issues of Providing Internally Displaced Persons with Temporary Accommodation», «On Amendments to the Law of Ukraine 'On the Status of War Veterans, Guarantees of their Social Protection'» to simplify the procedure for granting the status of a combatant, a person with war-related disabilities, a family member of a deceased defender of Ukraine, «On Amendments to the Civil Code of Ukraine on Improving the Procedure for Opening and Registering Inheritance», «On Amendments to Article 367 of the Criminal Code of Ukraine on Strengthening Responsibility for Negligence in Office if it Caused the Death of a Person», etc.), as well as improving the constitutional and legal regulation of the protection of Ukraine's sovereignty and territorial integrity. In particular, on 8 November, the Laws «On Approval of the Decree of the President of Ukraine 'On Extension of the Martial Law in Ukraine'» and «On Approval of the Decree of the President of Ukraine 'On Extension of the General Mobilisation Period'» extended the martial law and general mobilisation in Ukraine for 90 days, starting from 16 November 2023.

Instead, other laws, in particular, «On Amendments to Section II 'Final Provisions' of the Law of Ukraine 'On the Basic Principles of

Compulsory Seizure of Property of the Russian Federation and its Residents in Ukraine' to Clarify the Issues of Payment of Partial Net Profit by State-Owned Enterprises», «On Ukraine's Accession to the Extended Partial Agreement on the Register of Damages Caused by the Aggression of the Russian Federation against Ukraine», «On Amendments to the Budget Code of Ukraine to Ensure Support for the Defence Capability of the State and Development of Defence and Security» were intended to strengthen the state's financial capabilities to organise defence. Thus, the provisions of the latter law stipulate that «during the period of martial law, free balances of local budgets and balances of the special fund of local budgets (excluding own revenues of budgetary institutions and subventions from other budgets, as well as local internal and external borrowings), which were formed at the end of the budget period, shall be directed by decisions of the relevant local councils (military administrations) to pay salaries of employees of budgetary institutions, salary accruals, purchase of medicines and bandages, provision of food, payment for utilities and energy, servicing and repayment of local debt, social security, creation of conditions for treatment, recovery and rehabilitation of persons affected by the armed aggression of the Russian Federation against Ukraine, measures and works on territorial defence and mobilisation training, support for the security and defence forces, design, construction, repair of civil defence structures (shelters, radiation shelters), dual-purpose structures and arrangement of premises to be used for sheltering the population, construction of fortifications, payments related to the fulfilment of the guarantee obligations of the Autonomous Republic of Crimea, oblast council or city community (with the possibility of transferring such funds to another local budget).

The same regulatory act also established that, as an exception to the relevant provisions

of the Budget Code of Ukraine, a part of the personal tax on income in the form of cash allowances, remuneration and other payments received by military personnel, police officers and persons holding the rank of private or commander, which is paid (transferred) in accordance with the Tax Code of Ukraine on the relevant territory of Ukraine and in accordance with the specified provisions of the Budget Code of Ukraine, belongs to revenues of the general fund of the respective local budgets, shall be credited in full to the special fund of the State Budget of Ukraine and is directed in certain proportions and directions specified by the legislator. It is worth noting that this decision was not perceived equally positive on the ground, as it will seriously affect local communities' financial capacity. Moreover, the legislators established that the above transfers would be made as early as 1 October 2023, while the Law itself came into force only on 17 November 2023.

CONSTITUTION-RELATED POLITICAL AND LEGAL ACTS

On 22 November 2023, the Verkhovna Rada adopted the Statement on the 90th anniversary of the Holodomor of 1932-1933 in Ukraine. Honouring the memory of compatriots who died from artificial famine in Ukraine plotted by the criminal communist totalitarian regime in 1932-1933, the Statement says that the deliberate and purposeful killing of millions of Ukrainians by starvation was another tool of genocide of the Ukrainian people by Russian imperialism, which has not yet changed its

goal of destroying Ukraine and the Ukrainian people. At the same time, the Russian Federation's extraction of Ukrainian grain from the temporarily occupied territories, the ecocide committed by the aggressor as a result of blowing up of the Kakhovka Dam, the shelling of critical infrastructure and warehouses with food and humanitarian aid, the liquidation of Ukrainian political and cultural elites in the occupied territories of Ukraine, the assimilation of the population, the deportation and forced displacement of Ukrainian children outside Ukraine, the destruction, theft and removal of cultural heritage sites, and attempts to destroy Ukrainian national memory and Ukrainian identity and to impose Russian identity instead indicate that the methods used by the Russian Federation against Ukraine and the Ukrainian people have not changed over the years. In its Statement, the Verkhovna Rada once again condemned the criminal actions of the totalitarian regime of the USSR aimed at organising the Holodomor in Ukraine, which resulted in the significant destruction of the social foundations of the Ukrainian people, their centuries-old traditions, culture, gene pool and ethnic identity, and expressed deep gratitude to foreign states and international organisations that recognised the Holodomor in Ukraine as an act of genocide. At the same time, Ukrainian parliamentarians recognise the large-scale, unprovoked Russian armed aggression against Ukraine as a continuation of Russia's genocidal imperial policy, which aims to punish Ukrainians for their desire to build a modern, successful democratic state and for their civilisational choice to be part of the United Europe.

IV. ECONOMY

DECISIONS

On 9 November, the Verkhovna Rada adopted the draft state budget for 2024. In general, state budget revenues are set at UAH 1.768 trillion and expenditures at UAH 3.35 trillion. Defence is the main expenditure item. This means that 22.1% of GDP, or UAH 1.69 trillion will be allocated to the security and defence forces. Almost UAH 470 billion will be allocated for social protection.

The state budget deficit will be financed by external borrowings (UAH 1.67 trillion), domestic government bonds (UAH 525.9 billion), and privatisation proceeds (UAH 4 billion).

The budget calculations were based on an optimistic scenario of the country's socio-economic development, with real GDP growth of 4.6%, inflation of 9.7%, and an average annual dollar exchange rate of UAH 40.7 being the main indicators.

A prudent budget was one of the factors that helped Ukraine and the IMF reach a staff-level agreement on the second review of the Extended Fund Facility (EFF), paving the way for a \$900 million tranche.

The IMF noted that all quantitative performance criteria as of the end of June and indicative targets as of the end of September have been met. Also, most structural benchmarks have also been met. As a reminder, the IMF has presented 19 structural benchmarks, which Ukraine is obliged to fulfil under the \$15.6 billion programme of cooperation.

The agreement is subject to the IMF Executive Board approval and is to be considered in early December.

On 21 November, a bill on additional taxation of banks passed the second reading in the

parliament. This bill is necessitated by the need to increase funding for the Armed Forces of Ukraine to counter the aggressor. It should also be noted that, despite the hostilities, Ukrainian banks earned UAH 110 billion in net profit in the first three quarters of 2023.

The bill was amended for the second reading, in particular, the corporate income tax rate will be 50% for 2023, and 25% in subsequent years starting from 2024. This will bring UAH 24-25 billion to the budget in 2023, and UAH 6-7 billion in the following years.

As for other Verkhovna Rada decisions, the passing of the second reading of the Draft Law No. 10016-d on partial renewal of documentary tax audits deserves particular attention. It is important because it is one of the structural benchmarks within Ukraine's cooperation with IMF. Significant criticism of this document concerned inspections of individual entrepreneurs (FOPs). Ultimately, the draft law does not renew inspections of FOPs of categories I and II and businesses in the occupied territories or areas with active hostilities.

With the West's expert assistance, Ukraine is developing a new Draft Law «On State Control over International Transfers of Strategic Goods», which will be integrated into EU legislation to the fullest extent possible. In the meantime, the provisions of the new law will help maintain an acceptable balance between national and business interests on one side, and international requirements on the other.

In November, the EU Council and the European Parliament reached an agreement on a proposed regulation establishing a framework for ensuring the safe and sustainable supply of critical raw materials, as part of the specific provisions of famous Critical Raw Materials Act. It is expected that the implementation of its provisions will make the

EU more competitive and independent from external challenges.

Of course, this will be taken into account when developing domestic legislation.

DEVELOPMENTS, PROCESSES, TRENDS

A landmark event for Ukraine took place on 8 November, when the President of the European Commission, announcing her assessment of Ukraine and Moldova's progress towards EU membership, officially recommended to begin negotiations on the two countries' accession to the EU.

Therefore, the leaders are recommended to already approve a political decision to start Ukraine membership talks, but in reality, they may start only after Ukraine fully completes the requirement set by the European Commission last June.

Instead, it is believed that Ukraine has fully fulfilled 4 of the 7 criteria that accompanied the granting of candidate status.

In the meantime, the European Union transferred a new tranche of macro-financial assistance to Ukraine worth €1.5 billion. Although this assistance is a loan, not a grant, it is quite attractive thanks to long term and low interest. Therefore, since the onset of the large-scale war, EU assistance to Ukraine has reached €85 billion, with EU budget support in 2023 already amounting to €16.5 billion out of the planned €18 billion.

As for the next package, Bloomberg reports that the EU is preparing a €50 billion backup plan for Ukraine in order not to depend on Hungary, whose leadership has warned that it will block the adoption of the aid package, hoping that Brussels will unblock part of the €22 billion allocated to Hungary from the EU budget.

The plan envisages the provision of state guarantees by the EU Member States to raise the necessary funds in the capital market, thus allowing Ukraine's partners to collect the necessary money to support Ukraine in 2024-2027.

It should be emphasised that the EU clearly adheres to the announced Ukraine integration initiatives. In particular, the EU announced that it would not cancel the «transport visa-free regime» with Ukraine, as demanded by Polish carriers. As previously agreed, the relevant agreement on freight liberalisation between Ukraine and the EU will remain in force at least until 30 June 2024.

The Ukrainian delegation to the conflict negotiations, together with EU representatives, developed joint solutions and offered them to the Polish protesters, but the latter did not accept the proposals.

On 22 November, the Verkhovna Rada addressed the newly elected Polish Sejm and Senate with a proposal to unblock the border. The parties continue to search for solutions, but no progress has been made so far. Meanwhile, it should be borne in mind that information for the public is extremely limited, making it difficult to assess the rationality and balance of proposals.

Despite facing numerous difficulties in recovery, Ukraine is gradually showing signs of revival. According to the Ministry of Economy's preliminary estimates, the GDP growth in October was about 10.5% ($\pm 2\%$). And for the first 10 months of 2023, economic growth is estimated at 5.5% compared to the same period last year, which is quite high.

Gradual recovery of industrial production is a particularly good sign amid an increase in the raw material base from agricultural production, replenishment of coal and gas reserves to get through the winter, a stable situation in the energy sector, and investment demand from the public sector.

Meanwhile, the government approved draft laws on trade defence that are designed to adapt Ukrainian legislation to EU regulations and strengthen the protection of domestic producers.

In particular, these documents include provisions that expand domestic producers' capabilities to protect themselves from unfair and growing imports, reduce business costs

for the preparation of materials and documentation during defence investigations, set clear time limits for procedural stages of investigations, etc.

The significance of such draft laws stems from the need to open domestic markets after the war in order to accelerate the country's recovery, and therefore the need to protect against unfair and low-quality imports capable of harming the country's production potential.

European countries continue their partner support for Ukraine. In particular, Denmark has agreed to increase funding for the Fund that finances support for Ukraine by DKK 2.3 billion (€308 million) in 2023. Thus, a total of DKK 60.4 billion will be allocated for military support for Ukraine in 2023-2028 under the Fund.

With this step, Denmark achieves another important goal of reaching the defence spending target of at least 2% of GDP agreed by NATO member states. It also sends a clear signal that Ukrainians can count on Denmark's support in the long term.

Other support mechanisms that are being developed and implemented with partner countries also deserve attention. According to the Ministry of Economy, the government of Ukraine has developed a new mechanism for insuring ships against war risks. It will significantly reduce the current insurance premiums for carriers exporting and importing to Ukraine by sea. Ship insurance was made possible through cooperation with leading British reinsurance companies Marsh McLennan

and underwriters Lloyd's of London through the launch of the Unity Facility. The total coverage under this programme is \$50 million.

This is an extremely important mechanism, especially for farmers, who are currently the country's main exporters.

It should be added that in 2023/24 marketing year (MY), Ukraine is expected to export approximately 50.7 mln tonnes of grain. As of 18 October 2023, 7.9 mln tonnes were exported, with 70% shipped by sea.

Meanwhile, according to the State Customs Service, the exports of grains and pulses from Ukraine as of 15 November 2023/24 MY amounted to 10.97 mln tonnes, down 4.6 mln tonnes or 30% compared to the same period last season.

Although there are no disturbances in the Ukrainian currency markets, some signals point to a possible deterioration if new threats of expanding Russian aggression arise. In particular, the amount of foreign cash imported by domestic banks into Ukraine in October 2023 was \$1.056 billion, the largest amount since the onset of the large-scale aggression. At the same time, Ukrainians bought \$740 million from banks in October 2023, also the largest amount of foreign currency bought in almost a decade (since February 2014).

According to our observations, foreign currency cash markets are extremely sensitive to both positive and negative signals arising in the domestic socio-political and socio-economic environment.

V. . ENERGY SECTOR

PREPARATION FOR THE WINTER 2023-24

The heating season started in all regions of Ukraine. Therefore, as of the end of November, coal stocks at TPPs and CHPPs decreased to 0.95 million tonnes. Due to bad financial situation of PJSC Centrenergo, which failed to accumulate sufficient resources, its total coal reserves in warehouses decreased by 310 thousand tonnes in September-November. According to expert estimates, Ukraine may be lacking 0.7-0.9 million tonnes of coal for the normal passage of the winter season.

This shortage can be partially compensated for by natural gas, 14.9 bcm of which is stored in underground storage facilities (UGS), which corresponds to the average level of 2015-2019. Gas withdrawals from UGS average 90 mcm/day.

Thanks to an increase in production to 19 bcm (+7% compared to last year) and a decrease in consumption to 18-19 bcm (-40% compared to the pre-war period, but +9% compared to October 2022), Ukraine has enough gas not only to pass the cold season without import purchases, but also to use it as a reserve fuel at TPPs and CHPs. However, it should be borne in mind that 2.3 out of 15.5 bcm of reserves are held by non-residents. The increased risk of using Ukrainian storage facilities will encourage exporters to withdraw this gas during the first half of the winter season.

ENERGY BALANCE

By the end of November, all 9 NPP units under Ukraine's control were operating in the country's integrated power system (the ninth unit was connected on 20 November), as well as 24 TPP and CHP units, with 3 of them using natural gas as fuel. Ukrhydroenergo is operating in line with its targets, but its generation is limited to 1.1 MW after the destruction of the Kakhovka Dam. Reservoir levels are in line with the decision of the Interagency Commission for the operating mode of the Dnipro Cascade

and Dniester HPP. Electricity production at SPPs decreased due to shorter daylight hours and deteriorating weather.

Ukraine generated about 14 GW of electricity every hour, which is almost 50% more than in November 2022, when almost all thermal generation facilities went out after massive shelling (for reference, the generation in November 2021 reached 20 GW. NPPs accounted for most generation (57%), followed by TPPs (23%), CHPs (8%), HPPs (8%), and renewables (4%). Imports mostly exceeded exports. Interstate trade was carried out with Slovakia, Romania, Moldova, and Poland. The maximum export capacity in some hours reached 0.2 GW, while imports were 0.6 GW. In late November, imports increased due to a drop in temperature by an average of 6°C and the shutdown of 7 thermal power units for short-term emergency repairs. Although 4 of them were reconnected to the system within a few hours, the Minister of Energy instructed the State Energy Supervision Service to find out «the reason for the outage», as on 22 and 23 November, Ukrenergo had to request emergency assistance from the transmission system operators of Poland, Romania and Slovakia. This assistance allowed Ukraine not to apply the stabilisation outage schedules. Due to the high probability of such situations in the future (e.g., the next emergency assistance was received on 29 November 2023), it is critical to resolve the issue of attracting up to 1.7 GW of electricity from the EU on a market basis by revising the current methodology for setting price caps. The NSDC recommended the NEURC to ensure economic conditions for attracting electricity imports, but relevant decisions can be made no earlier than January 2024.

Due to the hostilities and other reasons, about 450 settlements were without power; additionally, up to 640 settlements were cut off due to heavy snowfalls on 28-30 November 2023. Within two days, power supply was restored to more than 600 settlements.

The problem of the industry's inadequate financial situation remains unresolved. Electricity payments owed by producers amount to UAH 21.3 billion; payments owed to universal service providers reach UAH 20.4 billion (-2.3 and -1.6 billion compared to October, respectively). Ukrenergo's debt to renewable energy generation increased to UAH 32.6 billion, although the company still does not agree with the amount. At the same time, market participants' debts to Ukrenergo amount to UAH 28 billion. The debts of district heating companies for gas exceed UAH 95 billion. The NSDC has instructed the Cabinet to pass decisions on how to repay these debts, but the nature of these decisions is unclear.

Although natural gas consumption increased by 7% compared to November 2022, there was no shortage of gas for heating and cooking. However, poorly prepared transfer of 16 municipal and regional distribution system operators to the management of Gas Distribution Networks of Ukraine LLC of JSC Naftogaz Ukraine led to problems with payments for services provided to consumers.

Increased demand for propane-butane as a fuel for boiler houses in the EU, changes in customs rules to avoid purchases of Russian petroleum products, and the partial blocking of 4 of 9 automobile checkpoints on the Ukrainian-Polish border resulted in a situational shortage of automotive propane-butane in some retail chains, which led to an increase in its prices. Other petroleum products are sufficient to meet demand, which is gradually declining due to seasonal factors.

TRANSIT

In the reporting period, Gas Transmission System Operator of Ukraine LLC transited 39-42 mcm of Russian gas per day. About 93% was sent to Slovakia, and 7% – to Cuciurgan (Moldavian) power station in Transnistria. Transportation was carried out through the Sudzha gas metering station.

JSC Ukrtransnafta transited 30-35 thousand tonnes of Russian oil per day to refineries in Slovakia, the Czech Republic and Hungary. Transportation was carried out via the southern branch of the Druzhba pipeline.

PRICE SITUATION

In November, the price index for base load (BASE) on the day-ahead market (DAM) was UAH 4,041/MWh, and at the peak (PEAK) it was UAH 4,687/MWh (+7.5 and +19.4% compared to October). The difference in the growth rates indicates an increase in the shortage of shunting generation.

The weighted average price on the intraday market (IDM) amounted to UAH 4,604/MWh, and on the DAM – UAH 4,358/MWh (+5.9 and +7.2% compared to October, respectively).

The weighted average price of December natural gas in Ukraine based on the results of electronic trading on the UEEX in November was UAH 12,893/tcm (€328/tcm, -15% compared to October). In November, the gas tariffs of Naftogaz Ukraine for non-household consumers amounted to UAH 17,600, and from 1 December 2023 – UAH 16,050/tcm, including VAT. The relative decrease (-8.8% compared to the previous month) is due to the declining cost of natural gas at the European TTF hub brought to the Ukrainian border (UAH 24,196/tcm, including VAT, on 30 October 2023).

Traders' concerns about the normal passage of the winter season in Europe have somewhat subsided, as evidenced by the decline below the 10-year average of the TTF premium over the Month-Ahead for Q1 2024 (+2 compared to +3 €/MWh).

In November, Coal (API2) CIF ARA (ARGUS-McCloskey) steam coal futures quotes ranged from \$119 to \$126/t (\$118.6/t on 30 November 2023), a reduction from October, when they peaked at \$139/t on 13 October 2023. Coal stocks at ARA terminals amount to 6.4 million tonnes (-1% compared to the annual average; -10% compared to November 2022).

In November, Brent crude oil futures quotes ranged from \$77 to 86/bbl (\$80.8/bbl on 30 November 2023), while reaching \$92/bbl in October. The main reason for this down-trend was the excess of supply over demand due to the lower-than-expected growth of the latter. If current trends continue, oil supply in 2024 will be 103.4 million barrels per day, while demand will not exceed 102.9 million barrels.

Following reports that «a decision will be made to further reduce production by 1 million barrels a day» at the next OPEC+ meeting, quotes rose, but it turned out that these were not general but «voluntary» cuts that will come into effect in January 2024. The Russian Federation promised to cut production the most (by 0.3 mbpd), which may indicate problems with its sales of crude oil.

Retail prices for diesel fuel and petroleum in Ukraine did not change significantly, while autogas, due to its limited supply, rose by almost a quarter. As of 30 November 2023, the indicative prices for Euro 5 A-95 petroleum and Euro 5 diesel fuel were UAH 54.33 and 54.28 per litre, respectively, while LPG car fuel was UAH 36.74 per litre.

CHANGES IN THE REGULATORY FRAMEWORK

The President enacted the NSDC decision «On additional measures to strengthen the resilience of the energy system and prepare the national economy for the autumn-winter Period of 2023/24». Among other things, this document obliges the government to pass a decision by 12 December 2023 on paying off the debts of critical infrastructure enterprises and public institutions to the supplier of last resort and universal service providers for the consumed electricity, as well as on reconstructing CHP plants managed by Naftogaz Ukraine using gas piston and gas turbine units to create highly manoeuvrable capacities. Gas power generators must be installed at the GTS facilities within two months.

By the end of 2023, the Verkhovna Rada is to submit a draft law introducing criminal liability for unauthorised withdrawals of natural gas from the Ukrainian gas transmission system. It is also planned to set a zero export quota for natural gas of Ukrainian origin in 2024.

The draft law should also exempt imports operations, as well as goods and/or services provided free of charge or with financing from the Energy Support Fund of Ukraine as assistance to electricity market participants from import duty and VAT.

The NEURC is tasked to improve the mechanism for imposing special obligations on electricity market participants by 12 December 2023 in order to balance their financial position. The Commission is also recommended to bring the price caps on the day-ahead, intraday and balancing markets in line with the methodology and create economic conditions «for attracting electricity imports during the autumn-winter period of 2023/24». The level of price caps determines the possibility of attracting up to 1.2 GW of electricity from the EU on a market basis, primarily during peak hours.

The Verkhovna Rada adopted the Law «On Minimum Stocks of Oil and Oil Products» aimed at implementing the requirements of Directive 2009/119/EC. The respective stocks will be created and stored at the expense of market participants. Their obligations arise 12 months after the date of entry into force of this Law.

The Cabinet of Ministers added military administrations to the list of recipients of humanitarian aid for meeting energy needs, expanded the list of its beneficiaries, and provided for the introduction of an ICT system – a platform for operational monitoring of the energy sector and accounting for aid – by the Ministry of Energy.

The Ministry of Defence announced obliging suppliers to add red and green markers to diesel fuel and petrol, respectively, intended for the defence forces. This should prevent the illegal production of fuels and/or sale of petroleum products subject to zero excise duty in retail chains. It is expected that the «labelled» fuel should arrive to the units «at the end of November». The initiative is useful and may reduce misuse, but the relevant decision should have been made at the government level.

At the meeting of the working group on the implementation of the law on the natural gas market on 15 November, the NEURC proposed to increase the gas distribution tariff for legal entities. The timing and size of the increase are still discussed, but such a decision is quite

likely given the recent transfer of 16 city and regional distribution system operators to the management of Gas Distribution Networks of Ukraine LLC.

Meanwhile, the NEURC approved electricity dispatching and transmission tariffs for 2024 (UAH 100.37/MWh and UAH 592.89/MWh, respectively), for further discussion although Ukrenergo, while agreeing with the first figure, considers the second to be at least 5% lower than necessary.

The Draft Law No. 10215, recently submitted to the Verkhovna Rada for consideration, aims to reduce the circulation of low-quality fuel. Its authors propose to apply an excise tax rate of €245.50 per 1,000 litres for all organic solvents and diluents, as well as oil and gas condensate, if they are sold «to persons who are not registered as excise tax payers for the sale of fuel». Although the document was developed by Danylo Hetmantsev and Yaroslav Zhelezniak, it is of poor quality, so it will hardly achieve the intended purpose if adopted.

INTERNATIONAL COOPERATION

ENTSO-E operators reported that, due to the IPS's full compliance with the key technical requirements, a permanent connection between the power systems of Ukraine

and Eastern Europe was established on 28 November 2023, while transmission capacity between the systems was increased from 1.2 to 1.7 MW. However, attracting this amount of electricity from the EU on a market basis will be possible only after the current methodology for setting price caps is revised.

The NEURC and the Energy Community Secretariat, at the initiative of the European Commission and donors, signed a Memorandum of Cooperation on verifying international assistance. Its implementation «will enable control over the use of items purchased and delivered under the Ukraine Energy Support Fund by Ukrainian energy companies». According to the Ministry of Energy, the total amount of donor commitments for grant contributions to the Ukraine Energy Support Fund is €322 million, of which €192 million has actually been transferred from 15 donors, and the rest is the announced amount.

The EBRD and Naftogaz Ukraine signed a €200 million loan agreement to build up strategic gas reserves. Norway and the Netherlands shared the credit risk with the EBRD. The agreement will enter into force after the issuance of the relevant state guarantee. However, the use of the funds needs to be clarified, as Naftogaz Ukraine did not plan any purchases, claiming that its own resources are sufficient to meet the needs of consumers.

VI.

SOCIAL SPHERE

LABOUR MARKET

The NBU's Inflation Report warns about the difficult situation on the Ukrainian labour market, despite employment growth, which is being driven by increased demand for labour. The main problems of the labour market are the slow decline in the unemployment rate and the ongoing difficulty in finding qualified workers.

The labour market recovery is uneven across industries and regions, reflecting changes in the structure of the economy. The growing demand for workers, which accelerated in the spring, is probably driven by seasonal factors. In the meantime, more businesses are facing a shortage of skilled workers, although estimates vary by type of business. According to the State Employment Centre, the largest number of vacancies are currently for retail workers (about 44,000), skilled tool workers (36,700), specialists in the maintenance and operation of equipment and machinery (38,300), and unskilled workers (39,600). These trends point at significant structural changes and imbalances in the labour market.

A certain recovery in the labour market stirs up economic activity. The number of job offers has been growing for months, now reaching its peak since the beginning of the war. The number of vacancies on major online job portals (work.ua, robota.ua, and jooble) is about 100,000 each – a 3-5% increase from September 2023, which was also considered a «record-breaking» month. In October-November 2023, there were only 15% fewer vacancies than in pre-war 2021 (for comparison, in autumn 2022, there were 40% fewer offers than before the war). At first glance, such an increase in the employers' activity signals about the rapidly growing labour market, which in turn may indicate an economic recovery. If the growth in the number of vacancies continues, the labour market could reach pre-war levels

by the end of this year or early next year. However, employers are increasingly abandoning official channels when looking for workers. The State Employment Centre reports that the number of vacancies is declining. As of 1 October 2023, there were about 255.3 thousand vacancies, compared to more than 325 thousand a year earlier.

At the same time, the largest job portals (work.ua, robota.ua, and jooble) report the decreasing number of CVs, meaning that the lines of job seekers are shrinking from month to month. The number of applicants in October-November 2023 was 20% less than in the same period in 2022, let alone the pre-war 2021. The imbalance between supply and demand is growing in the labour market, meaning that it becomes increasingly difficult for companies to find the right specialists.

This situation may result from both limited labour supply due to migration and mobilisation (which has become a disaster for businesses in economic terms, as it cannot be planned and predicted) and a gradual increase in employment. As a result, the official unemployment rate is declining – as of 1 October 2022, the State Employment Centre registered about 785,000 unemployed, while in early October 2023, their number dropped below 418,000. However, real unemployment remains very high at around 21-25%. According to the International Labour Organization, Ukraine is currently among top ten countries with the highest unemployment rates. The situation is particularly acute in the East, where the share of unemployed is much higher (43% of those who were employed before 24 February 2022), primarily due to the proximity of the frontline and the destruction of infrastructure and production facilities. The proportion of those not working is also higher among young people, women, and people of pre-retirement age, which, however, coincides with the pre-war trends.

The logic suggests that the response to a shortage in the labour market should be to increase salaries. But it is still a question whether this logic will work in practice, given the imbalance of supply and demand in the labour market, as well as the difficult financial situation of many Ukrainian companies.

INCOME OF THE POPULATION

According to estimates based on indirect data, financial standing of Ukrainian households has gradually improved in 2023. Average household incomes are growing primarily due to budget support. For the second year in a row, such payments as military pay-outs, pensions, and social benefits, remain the key contributors to household incomes. Given the shortage of skilled workers, wages in the private sector are expected to increase as well. According to the Ministry of Economy, the average salary in Ukraine will reach UAH 18,118 by the end of 2023, a 22% increase from the last year. However, this year's inflation is higher than the growth in wages, meaning that the average wage's purchasing power is actually decreasing.

This is confirmed by a survey of households that evaluate their financial situation as difficult. If in 2021, only 12.2% of Ukrainians saved on food, then in 2023 their share increased to 26.2%. At the same time, the share of those who can afford any purchases has increased almost 3.5 times, from 0.5% to 1.7%. This suggests that the mechanism of national income distribution has become even more unfair in the war. Thus, well-off citizens control the flow of external financial and humanitarian aid and increase their wealth. This makes polarisation of society even bigger and increases social stratification. In the settings

where national wealth is created not by a working economy, but by financial flows of international aid, the middle class (employees, the self-employed, SME representatives, that is, people who are the main taxpayers) is essentially disappearing.

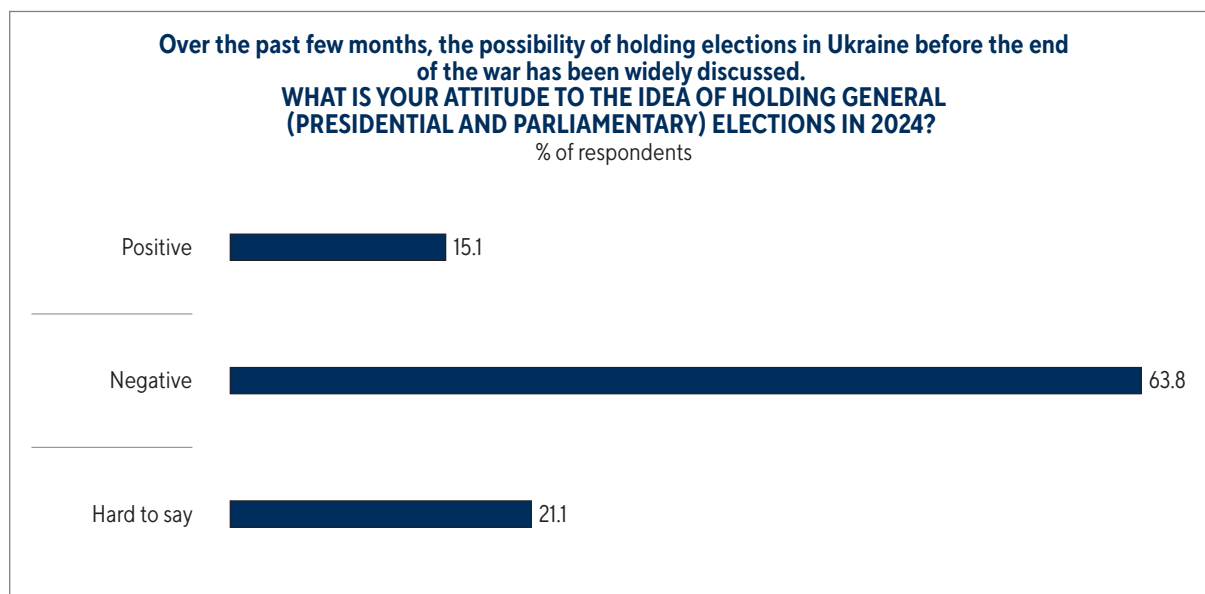
Facing the threat of reducing direct budgetary support from the United States, Ukraine has once again **postponed the increase in teacher salaries** until 2024. The Resolution No. 822 from 2019 «On remuneration of pedagogical, pedagogical-scientific and scientific staff of educational and scientific institutions» provided for an annual increase in teacher salaries in order to guarantee the minimum official salary of a teacher pursuant to Article 61 of the Law on Education. The pedagogues' official salaries should be calculated based on the minimum wage of a pedagogical worker in the amount of 4 subsistence minimums for able-bodied persons as of 1 January of the relevant year. Given that the draft State Budget for 2024 establishes a subsistence minimum of UAH 3,028, its fourfold amount would be equal to UAH 12,112.

However, due to the limited financial resources of the state and local budgets under martial law, the above Resolution has been suspended again until 31 December 2024. Regrettably, this long-suffering Resolution has already been suspended in 2020, 2021 and 2022.

Thus, the budget for 2024 does not provide for additional expenditures to set the minimum wage and official salary of an employee of the first tariff category of the Unified Tariff Scale. Teachers' salaries are not set to be reviewed.

VII.

CITIZENS' OPINIONS ABOUT CURRENT ISSUES¹



IF YOU ARE POSITIVE ABOUT THE IDEA OF HOLDING GENERAL ELECTIONS IN 2024, PLEASE EXPLAIN YOUR POSITION

% of respondents

It is necessary for supporting democracy in the country	6.0
It is necessary for demonstrating the world that Ukraine is a democratic state	5.4
It is necessary for changing the government	5.1
The elections will help facilitate the discussion in society about the existing problems in the country and ways to address them	4.9
It is necessary for renewing the government, even if the same political forces remain in power	4.9
Other	0.2
Hard to say	0.2

* The respondents could choose all appropriate answers.

¹ Results of a sociological survey conducted by the Razumkov Centre's sociological service on 21-27 September 2023 as part of the Pact's ENGAGE (Enhance Non-Governmental Actions and Grassroots Engagement) programme in Ukraine funded by the United States Agency for International Development (USAID). The contents of the survey are the sole responsibility of Pact and its partners and do not necessarily reflect the views of USAID or the United States Government.

The face-to-face survey was conducted in Vinnytsia, Volyn, Dnipropetrovsk, Zhytomyr, Zakarpattia, Zaporizhzhia, Ivano-Frankivsk, Kyiv, Kirovohrad, Lviv, Mykolaiv, Odesa, Poltava, Rivne, Sumy, Ternopil, Kharkiv, Kherson, Khmelnytskyi, Cherkasy, Chernihiv, Chernivtsi oblasts and the city of Kyiv (survey in Zaporizhzhia, Mykolaiv, Kharkiv and Kherson regions was only carried out in government-controlled areas not subject to hostilities).

The survey was based on a stratified multi-stage sampling method with random selection at the earlier stages of sampling and a quota method of selecting respondents at the final stage (when respondents were selected according to gender and age quotas). The sample structure reflects the demographic structure of the adult population of the surveyed areas as of the beginning of 2022 (by age, gender, type of settlement).

A total of 2,016 respondents aged 18+ were interviewed. The theoretical sampling error does not exceed 2.3%. Additional systematic sampling deviations may be caused by the consequences of Russian aggression, in particular, the forced evacuation of millions of citizens.

IF YOU ARE NEGATIVE ABOUT THE IDEA OF HOLDING GENERAL ELECTIONS IN 2024, PLEASE EXPLAIN YOUR POSITION % of respondents	
The country has no money for elections	36.1
Ukrainian legislation does not allow elections during martial law	31.9
It will be difficult to ensure the safety of voters	30.8
During martial law, it is impossible to comply with the standards of democratic elections due to the temporary restriction of political rights and freedoms of citizens	29.1
It is impossible to organise voting in the temporarily occupied territories	26.3
Temporarily displaced persons and Ukrainian refugees abroad will face problems with voting	24.0
It is impossible to organise voting for military personnel who are in the areas of hostilities	22.5
If online voting is allowed, russian special services will be able to interfere in the voting process	14.0
There is a risk of escalation of internal political conflicts and populist decisions amidst war	13.2
Possible temporary cancellation of martial law during the war for the purpose of holding elections will have a negative impact on the country's security and defence capability	10.6
Members of election commissions, official observers and candidates for elected positions may be mobilised	8.7
Other	1.5
Hard to say	0.3

* The respondents could choose all appropriate answers.

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