

# UKRAINE: FROM WAR TO PEACE AND RECOVERY

Analytical Assessments



# I.

## NATIONAL SECURITY AND DEFENCE: KEY DEVELOPMENTS, PROCESSES, TRENDS

The wait for a Ukrainian counter-offensive became the dominant factor affecting both the battlefield and the political and information space. The absence of any operationally significant territorial gains for Russians in March may confirm assumptions about the serious depletion of Russia's offensive potential. At the same time, this is more about the assessment of Russia's military capabilities as of the end of March 2023, rather than its overall ability to wage war in the near future.

The weakening of offensive capabilities necessary to achieve strategic objectives has obviously made the Russian leadership realise the impossibility of achieving maximalist goals at this stage but has not led to their revision. Instead, Putin's regime is stepping up its transition towards a protracted war, consistently introducing de facto martial law in the country.

### COMBAT ACTION

Russia's main efforts in March were aimed at:

- ✓ completing the occupation of Luhansk oblast and developing an offensive in the Donetsk sector to reach these regions' administrative borders, which would mean partial achievement of the minimum goals of the so-called «special military operation»;
- ✓ regrouping forces and building up human and material reserves to conduct offensive operations or deter Ukrainian counter-offensive in certain segments of the frontline;
- ✓ building a deeply echeloned defence in the occupied territories and in the Russian border regions;
- ✓ undertaking massive strikes on critical infrastructure and military facilities using kamikaze drones, cruise and ballistic missiles.

The Ukrainian defence forces carried out measures pursuing the following objectives:

- ✓ accumulating human and material reserves necessary for the counter-offensive;
- ✓ countering the enemy's efforts to seize the tactical initiative in the most threatening areas;
- ✓ depleting enemy forces and destroying accumulations of manpower, equipment, and material reserves.

In March 2023, the overall situation on the battlefield did not change significantly compared to February. The most intensive hostilities were observed in the Kupyansk, Lyman, Bakhmut, Avdiivka and Shakhtarsk sectors. With Bakhmut remaining one of the war's hottest spots, Avdiivka became another epicentre of intense fighting, where the enemy concentrated its offensive after unsuccessful attempts to storm Vuhledar. The most active fighting also took place in the Kupyansk, Lyman and Shakhtarsk sectors.

Other segments of the frontline mostly saw positional fighting. Russians continued to launch rocket and artillery attacks in the frontline areas and used long-range missiles and kamikaze drones targeting the entire territory of Ukraine. Russia's tactics of massive strikes is gradually changing, namely its priorities, the combination of types and number of munitions, etc. At the end of winter, when it became clear that the massive attacks failed to achieve the desired outcome – the demolition of Ukraine's energy system, the Russian command returned to tactics used early in the full-scale invasion: making military facilities and transport infrastructure its priority targets.

The Russian side devotes a great deal of attention to the information and psychological



support of its military operation. According to Hanna Maliar, Ukraine's Deputy Minister of Defence, the enemy is trying to sow doubts both in society and among the military about the rightness of the high command's decisions to defend Bakhmut, to undermine public trust, and to provoke the military leadership to take actions advantageous for the enemy. The most widespread Russian messages promoted the idea that defending Bakhmut was purely political and futile effort, lacking any military expediency. Although a number of publications in leading Western media and statements by officials expressed similar concerns, this does not necessarily point at the Russian trace, but does not rule out such influence.

The threat of a ground invasion from Belarus was still considered unlikely over the month. However, besides practical steps in support of Russian aggression, the Belarusian leader's invariably aggressive and provocative rhetoric now includes a «nuclear» factor. The decision to deploy tactical nuclear weapons on the Belarusian territory is clearly designed to intensify nuclear blackmail as an influence on Western partners.

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

With every passing month of the war, financing of current defence expenditures and fulfilling state obligations to servicemen, veterans, and families of fallen defenders becomes increasingly challenging.

On 13 March, the Cabinet of Ministers has approved the bill amending the Law of Ukraine «On the State Budget of Ukraine for 2023» that increases spending on the security and defence sector by UAH 518 billion, due to «the increase in the number of military personnel and the need to fully supply them by the end of the year».

Changes from 1 February to the procedure of awarding an additional UAH 30,000 to the military created opportunities to save budget funds. On the other hand, these changes have affected a wide range of individuals, who are not on the frontline but are entitled to such additional payments. The Verkhovna Rada has registered a draft law

No. 9071 that returns such payments to military personnel, police and civil defence officers.

In her 22 March interview, Halyna Tretyakova, the Chair of the Verkhovna Rada Committee on Social Policy and Veterans Rights, noted that the state budget was unable to compensate for the benefits to veterans provided for by law and that the system of such support required transformation and update. The draft concept proposes replacing lifetime benefits with a two- to three-year stipend/surcharge after demobilisation.

Scandals related to the ongoing mobilisation have emerged in the Ukrainian public space. They concerned both evasions by citizens liable for military service and abuses by officials, namely attempts to meet the quantitative targets by any means, including by ignoring the requirements for serving summons. Official statements say that no urgent legislative changes are currently on the table, although the government recognises the need to review the mobilisation policy and introduce systemic changes in the organisation of military registration and mobilisation processes by the territorial recruitment and social support centres (TRSSC). Along with the forced mobilisation measures, a rather innovative initiative to create the Offensive Guard was implemented, with about 28,000 volunteers joining the force during March.

The decision to restrict journalists' access to cover events in the combat zone and front-line areas was another high-profile event in March. As a result, war correspondents are virtually prohibited from entering the «red zone» and must be accompanied by a press officer in the «orange zone». Such restrictions are objectively justified by security considerations, such as protection against leakage of sensitive information and physical safety of journalists. On the other hand, media representatives view this as an attempt to introduce excessive military censorship against media outlets that publish critical materials contradicting the official policy of the joint information telethon. The public outcry following the Washington Post publication of a critical interview with Battalion Commander Anatoliy Kozel (codename «Kupol») could be another reason that prompted the Armed

Forces leadership to introduce additional restrictions. It is noteworthy that the officer himself described the final text of the publication as not entirely consistent with the content of his conversation with journalists.

## **FOREIGN EVENTS (EXTERNAL FACTORS)**

March saw perhaps the largest deliveries of Western military aid for the entire period of the war. Most of them result from the implementation of decisions made at previous Ramstein format meetings. On the one hand, this boosts the Ukrainian defenders' combat capabilities, their ability to conduct both defensive and offensive operations. On the other hand, the wide variety of weapons makes the combat use and logistical support of such an «equipment and weapons zoo» that no army in the world has ever had increasingly challenging.

The first official delivery of MiG-29 Fulcrum fighters has both practical military significance for strengthening the Ukrainian Air Force and a political goal of encouraging other partners to decide on giving Ukraine some Western-made aircraft.

**The most important events, political statements and decisions of March 2023 did not fundamentally change the course and**

**prospects for ending the war. So, as of the end of March 2023:**

- ✓ The maximalist goals of the Kremlin's armed aggression against Ukraine remain unchanged. Being aware of its inability to achieve a convincing victory on the battlefield, the Russian leadership, is actively adapting intermediate targets and methods of achieving them, betting on a protracted war.
- ✓ Given the failure of the winter offensive campaign and the vague prospects for preparing forces and means for another offensive in the coming months, Russia's military and political leadership is forced to focus on defensive tactics in most parts of the frontline.
- ✓ The wait for a Ukrainian counter-offensive in the spring and summer 2023 became the dominant factor affecting both the battlefield events and the political and information space. Awareness of the significance of this operation's results for the further course of the war is, on the one hand, an incentive to increase the scale and pace of international support, and on the other hand, a deterrent for those partners who still see a higher threat from escalation than from the prospect of prolonging the war.



# II. FOREIGN POLICY

March 2023 saw a number of important regional and global events related to the war in Ukraine one way or another. They contributed to further international isolation of the aggressor and also deepened the geopolitical confrontation between the democratic world and the camp of authoritarian states. The main strategic event was undoubtedly the issuance of an arrest warrant for the Russian president by the International Criminal Court (ICC).

**Ukraine's initiatives.** On 3 March, Lviv hosted a United for Justice conference, which established the Dialogue Group, an international coordination mechanism for prosecuting crimes committed in Ukraine by the Russian invaders. A number of countries have joined this initiative, along with representatives of the European Commission, Eurojust, the ICC, and others.

On 18 March, the President of Ukraine enacted a decision of the National Security and Defence Council to impose sanctions on Russian military industrial companies and a number of foreign firms involved in arms supplies to the aggressor. Sanctions were imposed on 300 individuals and 141 legal entities (including the Syrian leadership).

Signing of the Agreement on the opening of an ICC Office in Ukraine by the Prosecutor General of Ukraine and the ICC Registrar in The Hague on 23 March was truly symbolic in the context of the month's events.

## INTERNATIONAL PROCESSES AND EVENTS

The main event of geopolitical and historical significance was the decision of

the ICC judges of 17 March 2023 to issue arrest warrants for Russian President Vladimir Putin and Children's Ombudswoman Natalia Lvova-Belova for the illegal deportation of children from Ukraine. This decision is an international legal act that cannot be ignored by at least 123 countries party to the Rome Statute, from South Africa to Austria, which are subject to the jurisdiction of the ICC. On the other hand, the arrest warrant for Putin has gained a world-wide resonance and is a powerful signal for further political and diplomatic isolation of the aggressor, let alone its significant moral and psychological effect on the international community. Moreover, this document should encourage the establishment of a special international tribunal for investigating the aggressor's crimes.

On 16 March, on the eve of the ICC's decision, the UN Independent International Commission of Inquiry on Ukraine released a new report on the investigation of war crimes committed by the Russian invaders in Ukraine, including the deliberate killing, torture, rape, and deportation of children.

The process of restoring the historical truth about the Soviet regime's crimes against Ukrainians indirectly corresponds to these events. In March 2023, a number of parliaments across Europe, including France, Iceland, and Belgium, decided to recognise the Holodomor as genocide of the Ukrainian people.

The ongoing process of global polarisation – the consolidation of the democratic world and the unification of authoritarian countries – has particularly materialised in March.



Democratic world	Authoritarian states
✓ On 10 March, the United States and the European Commission issued a joint statement in support of Ukraine and declared joint measures to counter Russian aggression in Europe.	✓ Self-proclaimed president of Belarus Alyaksandr Lukashenka paid visits to China (2 March) and Iran (13 March), signing a number of strategic documents with the leadership of these countries.
✓ On 20 March, Canada proposed an initiative to create a quadripartite partnership with Japan, South Korea, and the United States to jointly counter the influence of China and Russia.	✓ On 15 March, Bashar al-Assad and Vladimir Putin met in Moscow to strengthen the Russian-Syrian partnership.
✓ On 23 March, the European Council adopted a resolution reaffirming its unwavering support for Ukraine and strongly condemning the ongoing military assistance to the aggressor by Iran and Belarus.	✓ On 21-22 March, China's Xi Jinping visited Russia. The two leaders signed a package of 14 bilateral statements and strategic agreements.
✓ On 28-30 March, the second global Summit for Democracy 2023 was held at the initiative of the United States, with the participation of leaders from 120 countries. The event was dedicated to promoting democracy in the world and countering authoritarianism.	✓ Tehran announced plans to purchase Russian Su-35 fighter jets and jointly build a drone production plant in Russia. ✓ The navies of Russia, China and Iran held Security Belt 2023 joint exercises in the Gulf of Oman.

## STEPS TOWARDS EUROPEAN INTEGRATION

On 24 March, the government published the Annual Report on the Implementation of the EU-Ukraine Association Agreement for 2022. According to this document, Ukraine has already fulfilled 72% of its obligations under the Agreement, a 9% increase in 2022. The greatest

progress has been made in the following areas: statistics and information exchange (96%), intellectual property (94%), management of public finance (90%), justice, freedom, security, human rights (91%), and humanitarian policy (91%). At the same time, the most problematic areas include financial cooperation and anti-fraud (24%), consumer protection (48%), transport and transport infrastructure (53%).



# III. ECONOMY

## DECISIONS

In March, the IMF, together with the Government and the NBU, worked on a programme for Ukraine, and this new four-year loan programme worth \$15.6 billion is expected to be finalised and approved shortly.

As a reminder, the IMF provided Ukraine with \$2.7 billion in emergency financing in 2022, and since the onset of Russia's full-scale invasion, Ukraine has received in total more than 38 billion in budget support from foreign countries and international financial institutions.

At the same time, following a meeting with the IMF and the World Bank, a group of Ukraine's creditors provided financial guarantees for a new programme and a deferral of debt obligations until 2027. This will have a very positive effect on the country's recovery.

The Verkhovna Rada adopted amendments to the Law on the State Budget, increasing defence spending by UAH 537 billion. Most of these funds will be used to cover salaries of the military, which is extremely important as Ukraine prepares for a spring offensive seeking to liberate its territory.

Meanwhile, the amounts of funding for the army envisaged in the above law are not final and should be sufficient for the defence forces' needs in the first half of 2023. After that, the government will amend the budget accordingly, as it did in 2022.

The draft law aimed at Ukraine's implementation of the Common Reporting Standard (CRS) and due verification of information on financial accounts, approved by the OECD Council, has passed the second reading in the Verkhovna Rada. It provides for the annual international automatic exchange of financial account data.

Passing of this draft law is an important European integration step that will ensure Ukraine's proper fulfilment of its international information exchange obligations for tax purposes and increase the country's transparency and reliability as a partner state in information sharing.

According to the Ministry of Economy, in February 2023, Ukraine's GDP fell by 26% ( $\pm 2\%$ ), which is better than January (32%,  $\pm 2\%$ ) and reflects a gradual recovery in economic activity against the substantial reduction in the electricity deficit and the shorter duration of power outages due to the resumption of all available generation since mid-February.

The Ministry's decision to improve the GDP indicator could be welcomed, but is somewhat surprising, as the State Statistics Service (Ukrstat) has not yet published official information on the growth/decline of key economic sectors – industry, agriculture, transport, and construction. In addition, GDP figures in recent years have been reported quarterly rather than monthly. Therefore, it is likely that the above figures are only the Ministry's estimates that can hardly inform political decision-making, including budget revisions.

At the same time, the Ministry of Economy revised its macroeconomic forecast, downgrading Ukraine's GDP growth in 2023 from 3.2% to 1%. It assumed that the hostilities would not end in mid-2023 but could last «almost» until the end of the year. It should be added that during the same period, other institutions also revised their forecasts for Ukraine, and with the same outcome.

For example, the European Bank for Reconstruction and Development has significantly downgraded its forecast for Ukraine's GDP growth in 2023 from 8% (the September 2022 forecast) to 1%. The NBU expects GDP growth of only 0.3%, which is due to the

consequences of devastating attacks on energy infrastructure at the beginning of the year.

Ukraine and the European Union have extended the agreement on the liberalisation of road transport until 30 June 2024. The document was originally signed in June 2022 cancelling the need for Ukrainian carriers to obtain permits for bilateral and transit traffic to the EU. This agreement is vital for Ukraine and its European integration.

During the period of its validity, the volume of bilateral and transit road freight traffic increased by more than 50%, including the number of carriers crossing the border to the EU by 53% compared to the same period in 2021.

At the end of February, the Cabinet adopted the resolution «On indexation of pensions and insurance payments...», which provides for the indexation of pensions and monthly insurance payments, an increase in the minimum disability pensions for former uniformed personnel and persons affected by the Chernobyl nuclear disaster, and an increase in the minimum pension payments to certain categories of retirees. The payments are scheduled to start in March, but some pensioners, including those who work, will not see the new payments until April.

The government should be commended for its courage, because raising payments in the middle of the war is a very perilous decision given the high inflation and devaluation risks. However, these fears seem exaggerated, and inflationary shock is quite unlikely. May and June are more appropriate for relevant assessments.

## DEVELOPMENTS, PROCESSES, TRENDS

The Ukrstat provided summary data on the country's economic dynamics. In Q4 2022, Ukraine's real GDP fell by 31.4% compared to the Q4 2021, after falling by 30.8% in Q3. At the same time, compared to Q3, the GDP decline in Q4 2022 is estimated at 4.7% (seasonally adjusted). The deterioration is due to both the significant positive outcomes of pre-war 2021 and the country's increased losses in Q4 2022 due to intensified bombing and the ensuing destruction of critical and energy infrastructure.

At the same time, the Ukrstat improved its estimate of the annual GDP decline in 2022 to 29.2%, which is a marked improvement from previous estimates and is driven by large-scale international assistance and the expansion of financial support programmes for businesses.

In March, the IMF held discussions with the Ukrainian officials on a new long-term programme. It is yet unknown to which extent the new programme will take into account the military and security aspects. An agreement with the IMF is expected to convey a positive signal to international investors to enter Ukraine, which, however, seems doubtful, as a country at war will hardly attract private capital without adequate insurance guarantees. And the main assistance to Ukraine is provided by the US and the EU without regard to the IMF – rather, the IMF is guided by the positions of the US, UK, Canada, and Japan.

By the way, in 2021, Japan became the third largest donor for international development in the world behind the United States and Germany among all OECD members. Various kinds of its assistance to Ukraine are estimated at around \$1.6 billion.

Thanks to its partners, Ukraine's gross international reserves stood at \$28.87 billion as of 1 March 2023. Although this is slightly lower than in early February (by 3.5% due to significant interventions), it remains sufficient for short-term foreign exchange and financial balances, covering 3.7 months of imports for the coming period. This relatively high level is maintained thanks to receipts from international partners, which offset the NBU's net sale of foreign currency to cover the difference between supply and demand on the Ukrainian FX market.

In February, the government's foreign currency accounts received \$2.40 billion, including \$2.07 billion from the United States, which, together with the EU, provides the largest assistance to Ukraine. of macro-financial assistance to Ukraine in the amount of 1.5 billion euros out of the previously approved package of €18 billion.

Support for Ukraine continued in March. On 21 March, the EU disbursed the second tranche of macro-financial assistance to



Ukraine in the amount of 1.5 billion euros out of the previously approved package of €18 billion.

External proceeds are vital for Ukraine, as the demand for foreign currency on the interbank market significantly exceeds the supply, although there are some positive developments. The NBU sold \$290 million on the interbank FX market in the first week of March, \$280 million in the second week, and \$380 million in the third week – in total this is half as much as in January-February, when the weekly sales from reserves amounted to \$600-780 million. By the end of the month, however, weekly sales have once again increased to almost \$500 million.

In March, the NBU published the results of a survey it conducted in February 2023. They show that businesses have significantly alleviated their negative assessments of own economic performance. Economic activity is gradually recovering in all sectors except construction. In general, the Business Activity Expectations Index increased from 37.5 in January to 45 in February.

Importantly, industrial companies have also mitigated their pessimistic expectations about their economic prospects thanks to gradually restoring electricity supply and purchases of alternative energy sources: the sectoral index rose from 40.6 in January to 47.2 in February.

This is a positive signal for the economy, but March will be more revealing in terms of the correspondence between the survey results and actual activity. It is March results that will help formulate cautious conclusions about economic dynamics in the first half of 2023.

Despite the war, Ukraine has consistently implemented important economic structural changes. In this context, it is noteworthy that that on 13 March the private company Ukrdoninvest won the repeated privatisation auction for the sale of the Bilhorod-Dnistrovsky Commercial Sea Port for over UAH 220 million. The port specialises in transshipment of timber, mineral fertilisers, iron ore pellets, steel products and grain cargo.

For reference, The State Property Fund failed to privatise the Bilhorod-Dnistrovsky port at the first attempt, as the auction scheduled for 3 March was declared a failure.

Also, the Ust-Dunaisk Commercial Sea Port was sold on 17 January 2023 for UAH 201 million – this was the first ever sale of a seaport in the history of independent Ukraine.

It is important that these successful tenders took place early in the year, demonstrating the government's firmness and consistency in this field.

Importantly for the global economy (and thus for Ukraine), oil and gas prices in Europe have fallen significantly since the beginning of the year, reaching their lowest point since mid-2021 due to warm weather, saving and increased imports, as well as adjustment to the embargo on Russian supplies.

Capital Economics estimates that the energy stimulus could boost eurozone output by around 1.5%, roughly equivalent to annual growth. At the same time, consumer confidence has increased significantly. This may mean that households are spending more of the money they saved during the pandemic, which will contribute to further growth and thus to Europe's economic recovery.

# IV.

## ENERGY SECTOR

Throughout March, the power system continued to recover from the effects of Russian missile and drone attacks, and consumers were urged to use electricity wisely. In addition, the bad weather on 29 March led to power outages in 12 regions, and stabilisation schedules had to be applied in Kyiv city and oblast due to low grid capacity. Other than that, no shortages are expected in the power system in the coming months.

### ELECTRICITY MARKET

The Cabinet of Ministers has extended the current special obligations (SO) mechanism to provide households with electricity until 20 April 2023. The electricity price will remain at UAH 1.44/kWh for consumption up to 250 kWh per month and UAH 1.68/kWh above this amount. Several options for revising the tariff are being considered, such as modifying the current subsidies system and changing the tariff level depending on the volume of consumption.

In March 2023, Ukraine reduced electricity imports by 95% to 7 thousand MWh compared to the previous month. Slovakia supplied 5 thousand MWh and Moldova 1.5 thousand MWh.

ENTSO-E increases the limit on electricity exports from Ukraine to 850 MW from the current 700 MW (Ukraine received this technical capacity in February 2023). With the growth of renewable energy generation and the surplus of electricity, it is now possible to unlock electricity exports to the EU. In general, with the opening of exports, rational regulation is needed to prevent speculation in times of war.

Ukrenergo, Ukraine's transmission system operator, has concluded an agreement with 15 EU system operators on possible provision of emergency assistance to Ukraine when

needed; previously, such contractual relations were only with the energy systems operators of neighbouring countries.

### NATURAL GAS MARKET

On 20 March 2023, Natural Gas Front Month futures on the Dutch TTF hub reduced to €35/MWh, that is, \$445/TCM or UAH 20,000/TCM, VAT included, due to warm weather and stronger winds, as well as sufficient gas reserves in EU's underground storage facilities. In Ukraine, gas was traded at UAH 17,800-18,500/TCM, VAT included.

The moratorium on gas tariff increases for households is still in effect in Ukraine; in March, the annual gas prices for household consumers published by 9 companies ranged from UAH 7.70 to UAH 10, remaining unchanged since the beginning of the year.

Ukraine expects the EU to provide war risk guarantees for companies planning to store gas in Ukrainian UGS facilities. Stimulating the development of multilateral financial guarantees for gas market participants willing to work in Ukraine was one of the main topics of the meeting between the Ukrainian delegation and Kadri Simson, European Commissioner for Energy, in Brussels.

At the Energy Forum in Poland, it was proposed to introduce an embargo on imports of Russian LNG, similar to the one imposed on Russian oil. An alternative solution is to impose price restrictions on Russian LNG. EU sanctions do not apply to LNG and LPG imports (in 2022, EU countries paid €16 billion for Russian LNG). Russia's long-term programme for the development of LNG production envisages that its production in the country will at least triple by 2035, gaining new markets. Therefore, Russia may regain the EU market share lost as a result of a significant reduction in pipeline supplies and the ability to finance its military-industrial complex.

## RENEWABLES SECTOR

Despite the ongoing hostilities, growing debts to renewable energy producers and significant damage to facilities, European investors are still interested in green projects. To this end, producers demand the adoption of a draft law that would extend the validity of technical specifications for 3 years.

According to the Market Operator's report published on 20 March, the share of «green» electricity in the DAM/IDM reached almost 15% in February. The largest share – more than 30% – was generated from natural gas, 19.4% from HPPs and PSPs, 19.1% from nuclear fuel, and 7.94% from coal.

Adoption of the Law No. 8172 is also critical for Ukraine, as it defines the direction of electric transport and electric charging infrastructure development in the country over the next decade and regulates the connection and location of EV charging stations. Until 1 January 2025, the fee for non-standard connection of car charging stations to the DSOs' electricity networks will only include the fee for setting up electricity networks of the linear part of the connection.

Law No. 4527 on the development of co-generation was signed, creating conditions for the introduction of highly efficient heat production (implementation of the Directive 2012/27/EU on energy efficiency) and highlights

a step towards decentralisation of generation, which is especially relevant in times of possible of terrorist attacks.

The European Investment Bank plans to allocate \$50 million to support agro-processing, including biomethane and bioethanol production. Ukraine already has a legislative framework for the development of the biomethane market, which provides for the introduction of a mechanism for issuing appropriate guarantees of origin and the functioning of a biomethane register.

## PARTNERS' SUPPORT

In their joint statement of 10 March, the United States and the European Union commit to tackling the climate crisis, accelerating the global green economy, and building sustainable, secure supply chains. The partners also pledge close coordination to support Ukraine's energy security through further integration into European energy markets.

To date, 30 countries have helped Ukraine's energy sector. This includes 470 cargoes totalling about 6,000 tonnes, which have been distributed to 111 energy sector companies. A memorandum was signed between Ukraine and the Energy Community to support priority projects, infrastructure reconstruction and renewable energy sector renaissance.





# V.

## CITIZENS' OPINIONS ABOUT CURRENT ISSUES<sup>1</sup>

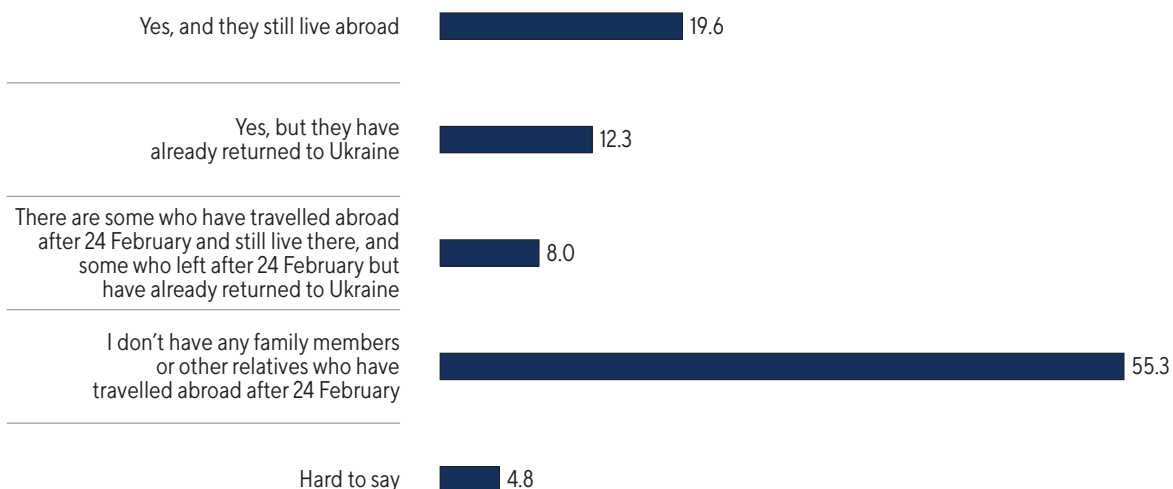
### DO YOU HAVE RELATIVES OR CLOSE ACQUAINTANCES (MILITARY OR CIVILIAN) WHO HAVE BEEN KILLED OR INJURED AS A RESULT OF HOSTILITIES OR SHELLING SINCE 24 FEBRUARY 2022?

% of respondents



### DO YOU HAVE FAMILY MEMBERS OR OTHER RELATIVES WHO HAVE TRAVELLED ABROAD AFTER 24 FEBRUARY 2022?

% of respondents



<sup>1</sup> Results of a sociological survey conducted by the Razumkov Centre's sociological service from 22 February to 1 March 2023 within the MATRA project supported by the Embassy of the Kingdom of the Netherlands in Ukraine.

The authors' assessments and conclusions should not be considered as the official position of the Embassy.

The face-to-face survey was conducted in Vinnytsia, Volyn, Dnipropetrovsk, Zhytomyr, Zakarpattia, Zaporizhzhya, 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 Zaporizhzhya, 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 2023 (by age, gender, type of settlement).

A total of 2,020 respondents aged 18+ were interviewed. The theoretical sampling error does not exceed 2.3%. At the same time, additional systematic sampling deviations may be caused by the consequences of Russian aggression, in particular, the forced evacuation of millions of citizens.

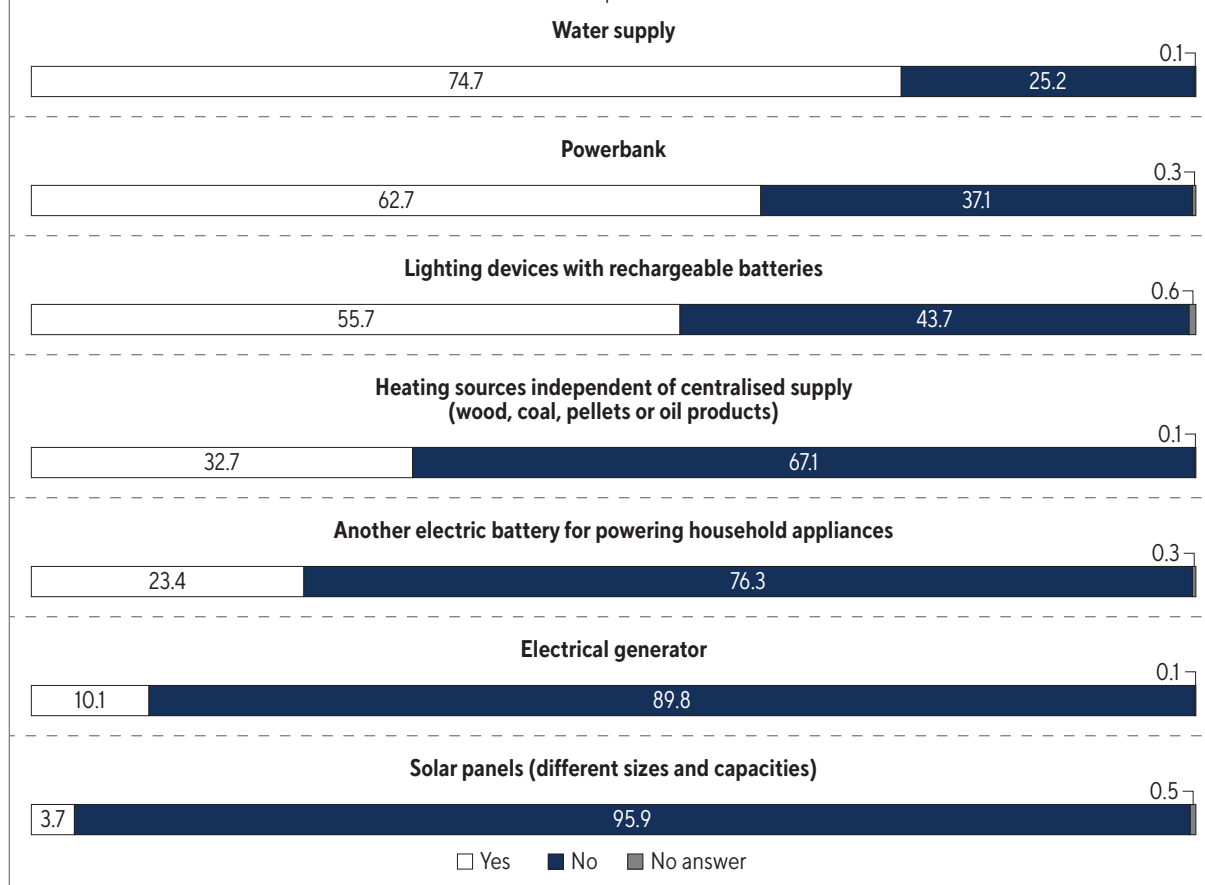
### HAVE YOU ENCOUNTERED THE FOLLOWING PROBLEMS WITH UTILITY SERVICES AFTER 24 FEBRUARY 2022?

% of respondents

	Yes	No	I do not have this service now, although I had it until 24 February 2022	I do not have this service now and I never had it before 24 February 2022	Hard to say
Periodic power outages	95.6	3.4	0.2	0.0	0.8
Periodic absence of Internet access	73.7	21.0	0.1	3.2	2.0
Periodic absence of mobile communication	72.2	25.4	0.2	0.4	1.9
Periodic water supply outages	49.9	42.1	0.1	6.9	1.0
Periodic heat supply outages	35.4	52.9	0.2	10.1	1.4
Difficulties with the transmission of meter readings	20.1	74.6	0.3	1.9	3.2
Technical difficulties in paying for utilities	19.3	76.5	0.2	0.5	3.5
Periodic gas supply outages	16.5	78.1	0.1	3.4	1.9

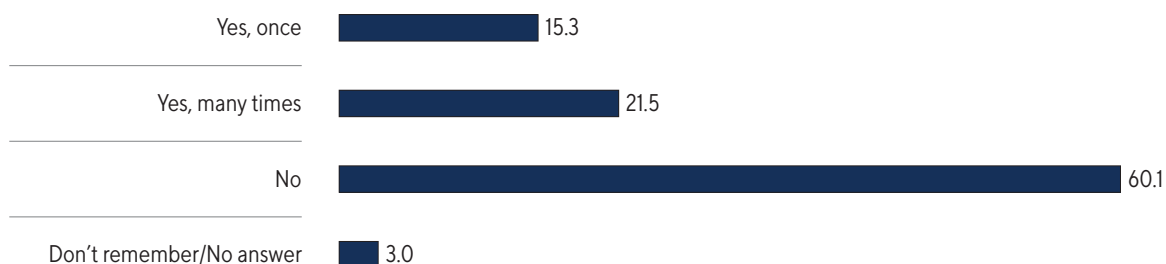
### DO YOU HAVE AT HOME ...?

% of respondents



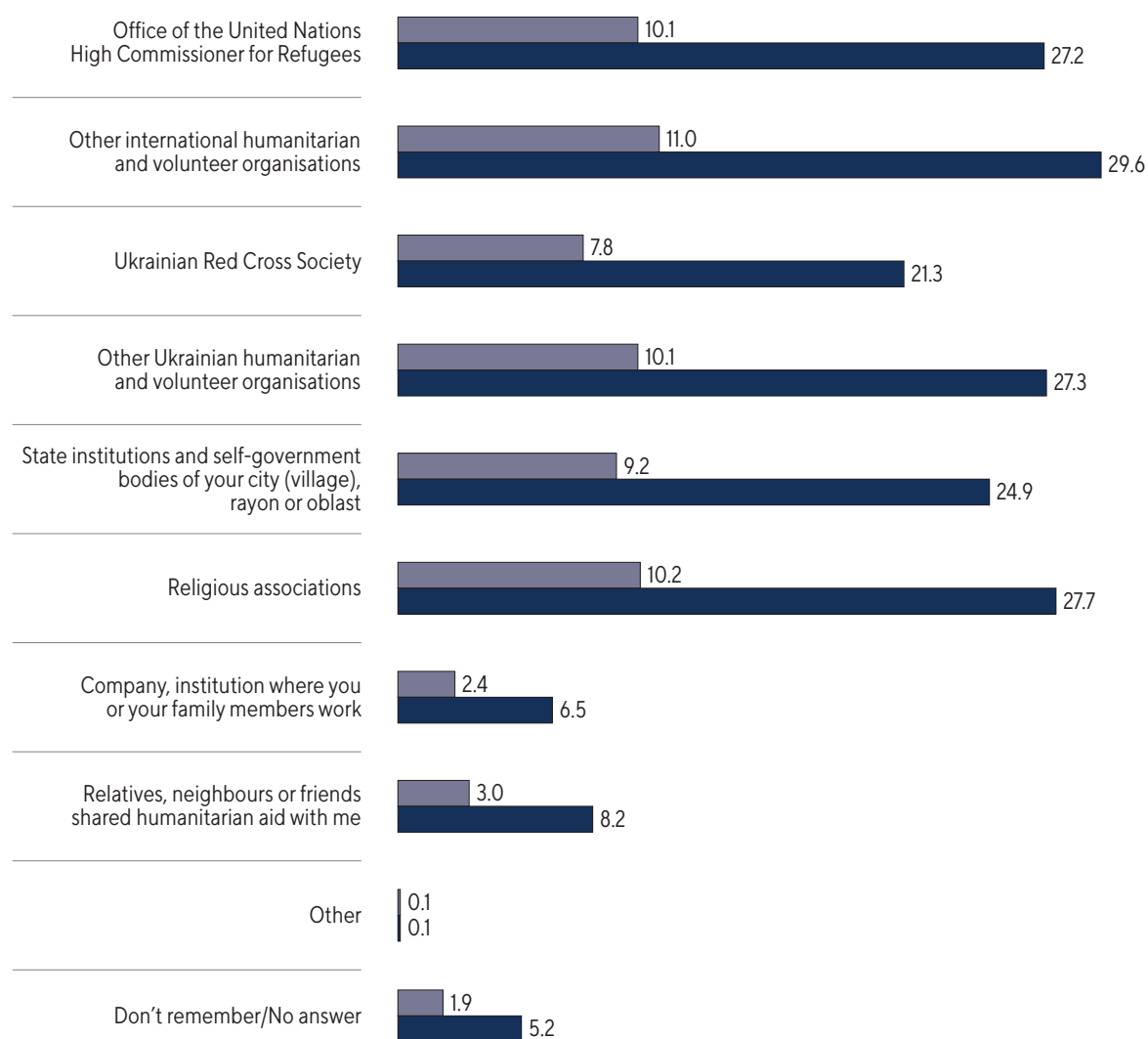
### HAVE YOU (YOUR FAMILY) RECEIVED HUMANITARIAN ASSISTANCE FROM ANY ORGANISATIONS OR INSTITUTIONS SINCE THE BEGINNING OF THE WAR (AFTER 24 FEBRUARY 2022)?

% of respondents



### IF YOU HAVE RECEIVED HUMANITARIAN AID, CAN YOU NAME THESE ORGANISATIONS OR INSTITUTIONS?\*

% of respondents



■ % among all respondents ■ % among those who received humanitarian aid

\* Respondents were asked to name all organisations, from which they received humanitarian aid.



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