

UKRAINE: FROM WAR TO PEACE AND RECOVERY

Analytical Assessments
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I.

NATIONAL SECURITY AND DEFENCE: KEY DEVELOPMENTS, PROCESSES, TRENDS

Throughout November 2025, Ukraine was at the epicentre of a «perfect storm» when adverse external and internal political factors simultaneously compounded an already difficult situation, significantly amplifying the overall negative effect. Against the backdrop of the enemy's largest advance on the front since November 2024, a large-scale corruption scandal erupted, dealing a heavy blow to Ukraine's international image and internal socio-political stability. The White House initiated another round of coercing Ukraine into peace, shattering the cautiously optimistic assessments of the Trump administration's rhetoric and actions in October, which were interpreted as signs of a shift from «attractive offers» to coercive pressure on Putin to seek peace.

COMBAT ACTION

In November 2025, there was [another wave of escalation](#) in fighting. The number of engagements reached almost 200 per day, the highest level recorded since the beginning of 2025. During the month, russian forces occupied approximately 505 sq. km, nearly double the territorial gains recorded in September–October (259 sq. km and 267 sq. km, respectively), though slightly below the pace observed in June–August (556 sq. km and 564 sq. km). The enemy achieved its greatest success – 40% of the territory occupied during the month – in the Huliaipole area, even though it saw only 16% of all assault operations. Meanwhile, in the Pokrovsk–Myrnohrad area, which saw the most intense fighting (32.5% of all attacks), the Ukrainian defence forces (SOU) lost only 35 sq. km, accounting for 11% of the total territory lost in November.

Throughout the month, the situation for the SOU in the Pokrovsk sector continued to

deteriorate, but russians failed either to encircle the city or to establish full control over it. Apart from being at the centre of military operation, Pokrovsk became the forefront of political and diplomatic confrontation. Its capture was to serve as Putin's [additional argument](#) in persuading Donald Trump of Kyiv's inability to prevent Moscow from achieving its maximalist goals. Recognition of Pokrovsk's political significance confronted the Ukrainian leadership with a difficult choice: to continue holding the city at the cost of heavy losses in personnel and equipment in urban fighting, or to withdraw from the semi-encircled stronghold in order to preserve forces, despite the risk of strengthening Moscow's negotiating position.

During the month, russian forces continued attacks on Ukraine's energy sector and significantly intensified missile and drone [strikes against railway infrastructure](#), both in frontline regions and in the medium and deep rear, with the aim of disrupting military logistics and undermining Ukraine's economy. [Ukrzaliznytsia](#) was forced to suspend rail services on certain routes where the distance to the frontline ranged from 20 km to 45 km. According to [foreign analysts](#), russian air strikes on logistics over the past few months have greatly contributed to the enemy's advance around Pokrovsk.

The SOU opened a [new phase of the war in the maritime theatre](#), striking russia's shadow fleet tankers for the first time. As a result of the previous attacks on its oil refining infrastructure, russia has been forced to increase exports of surplus crude oil. The new Ukrainian strikes raise risks for traders, which is bound to affect transportation costs for russian oil and, accordingly, revenues to the russian state budget. In addition, russia is incurring reputational losses, having suffered yet another setback in a maritime conflict against a weaker adversary. However, it remains unclear what

impact these strikes will have on the course of the war and on peace negotiations, as the emerging «tanker war» extends far beyond the immediate interests of the opposing sides.

PEACE PROCESS

Replacing the positive trends in peace efforts observed in October 2025, the Trump administration made another U-turn, proposing that official Kyiv urgently (by Thanksgiving) sign a 28-point «peace plan». Ukrainian President Volodymyr Zelenskyy stated that Ukraine was facing unprecedented pressure and a stark choice: «either a loss of dignity or the risk of losing a key partner». As of the end of November, the complex US-Ukraine negotiations had not been concluded, but the position of the «key partner» appeared more pro-russian than pro-Ukrainian, pro-European, or even neutral.

It is worth noting that Ukraine's negotiating position in the latest round of the peace «marathon» was weakened by the above-mentioned peculiarities of the Trump administration's policy, the inability to seize the initiative on the battlefield, limited capabilities to protect civilian infrastructure from russian air strikes, uncertainty regarding guaranteed external financial support, and the domestic political crisis surrounding the «Mindichgate» scandal.

By contrast, russia's negotiating position has been strengthened by de facto partner-level support from major international actors – Washington and Beijing. At the same time, claims about the inevitability of russia's victory and Ukraine's defeat in a protracted war of attrition are more likely to play into russian narratives than to be an unbiased assessment of the aggressor's military and economic capabilities.

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

Manpower superiority remains one of the key factors behind russia's successes. The extensive use of technological and tactical solutions by the SOU only partially compensates for the lack of human resources, while the deteriorating weather conditions for the use of FPV drones have largely negated their effectiveness in reconnaissance and fire

missions. According to the military, it is hard to believe in «the ability of an average brigade to cover a standard 4-5 km section of the frontline», since a brigade may consist of only 15-20 infantrymen who are forced to remain in positions for several months without rotation or stable logistical support.

In addition to the inability to mobilise the required number of conscripts, the problem of absence without leave (AWOL) and desertion is becoming increasingly acute. The number of related criminal proceedings between January and October 2025 reached 184,000, almost double the figure for 2024 (91,000), seven times higher than in 2023, and 18 times higher than in 2022. While the number of proceedings is not identical to the number of servicemen who left their units, the persistent upward trend is evident, as is the lack of effective response to this problem on the part of the country's military and political leadership.

FOREIGN EVENTS (EXTERNAL FACTORS)

In early December, the White House published a new National Security Strategy – the principal document defining US foreign policy for the coming years – which directly or indirectly affects the prospects for ending the Russia-Ukraine war and shaping Ukraine's post-war future. The written declaration of non-allied intentions on the part of the United States, against the backdrop of an escalating russian threat (commenting on the timeframe for the start of a possible war between russia and NATO, Germany's Defence Minister Boris Pistorius noted that the projections have been shortened to the extent of a possible «last peaceful summer»), constitutes a «moment of truth for Europe» – a test for its strategic agency in addressing the main challenge to European security and stability today, and of its capacity to ensure its own security over the long term.

As Western analysts observe, the regular publication of the US National Security Strategy over recent decades has rarely generated particular attention, but this time «Trump shocked Europe», notably through declared intentions to restore «strategic stability» with russia while simultaneously mounting a frontal political attack on US allies and partners in Europe, accusing them of prolonging the

Russia-Ukraine war and signalling an intention to halt further enlargement of NATO.

In effect, the new Strategy consolidates and formalises earlier statements and actions by the US administration aimed at dismantling the shared values and multilateral alliances of the so-called collective West, prioritising national interests and the recognition of the right of the strong. The Kremlin's reaction to the new Strategy is a telling confirmation of the objective grounds for European concern: «*The changes we are seeing are largely in line with our vision*».

Regardless of how closely Trump adheres to the principles and priorities declared in the Strategy, the document will have a substantial impact on the resource allocation and is currently perceived by the international community as a formalised reference point for analysing and forecasting the [Trump administration's still inconsistent and unpredictable policy](#).

RUSSIA

In Russia, a campaign of [mass recruitment](#) into reserve units is underway. According to recently adopted [legislative changes](#), reservists may be called up for special training and deployed to protect important facilities on Russian territory not only in wartime but also in peacetime. [Many analysts](#) believe that this decision by the Russian authorities should be interpreted as a covert form of mobilisation, driven by the reduction of existing recruitment schemes for volunteer contract soldiers

(including financial incentives and exemption from criminal liability) and by the authorities' reluctance to announce another formal wave of mobilisation. Given that the war against Ukraine is officially termed a «special military operation» – and thus not formally recognised as a state of war – while the illegally annexed regions of Ukraine are designated as «new territories», it is quite likely that Russian reservists may increasingly be deployed directly in combat operations on Ukrainian territory.

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

✓ In November 2025, Ukraine entered one of the most difficult and perilous stages of the war due to the combination of several external and internal adverse factors;

✓ The latest round of «peace efforts» by the Trump administration dismantled earlier cautiously optimistic assessments regarding a shift from «attractive offers» to coercive pressure on Putin to seek peace, and once again demonstrated Washington's intentions to impose terms amounting de facto to Ukraine's capitulation;

✓ The intensification of the negotiation process stimulated escalation across the land, air and maritime theatres of war, but at present there are no sufficient grounds to assert a direct causal impact of this escalation on the overall course of the war or on the peace negotiations.

II. FOREIGN POLICY

The foreign policy landscape in November was shaped by diverse events and processes that generally exacerbated geopolitical turbulence and economic instability in various regions of the world. A broader trend towards militarisation was evident, alongside the accumulation of conflict potential in relations between leading powers against the backdrop of deepening global polarisation. A new round of negotiations to end Ukraine war was one of the central themes of the month. Despite the high level of multilateral political and diplomatic engagement, these efforts have failed to produce tangible results. Throughout the month, the aggressor state intensified its military operations and stepped up its campaign of terror against Ukraine's civilian population.

INTERNATIONAL PROCESSES AND EVENTS

Negotiations on ending the war in Ukraine.

November saw the next phase of negotiations, which gained momentum after the publication of the 28-point russian-American «[peace plan](#)», prepared behind closed doors with no involvement from Ukraine and European partners. The document, which envisaged concessions unacceptable to Ukraine, was presented to Kyiv by the American side in a rigid, ultimatum-like manner. Subsequently, on 23 November, Ukraine, jointly with European leaders, including the United Kingdom, Germany and France, prepared counterproposals, reducing the document to 19 points. Further US-Ukraine talks in Geneva advanced the process but left a number of fundamental issues unresolved, including the status of the occupied territories, Ukraine's Euro-Atlantic integration, and American security guarantees to Kyiv. Europe's position was clearly articulated in the [European Parliament's resolution](#) of 27 November 2025, which emphasised that any peace agreement must provide Ukraine with reliable security guarantees, ensure accountability for crimes committed, and oblige russia to compensate Ukraine fully for the damage caused by the war unleashed by the Kremlin.

The intensive negotiation process continues in bilateral and multilateral formats; however, American moderation has thus far appeared largely chaotic and inconsistent. Washington has mainly focused on accommodating the interests of the aggressor, increasing pressure on Ukraine, and demanding concessions from Kyiv. In this situation, the strategic importance of a unified and consolidated position among **EU** member states has grown considerably, both to safeguard and advance Ukraine's interests and to establish a just and lasting peace on the continent, including credible guarantees to prevent further russian aggression.

Russia's hybrid intervention in Europe. In November, russia's hybrid aggression across European continent continued to escalate. During the month, there were numerous incidents involving unidentified UAVs entering the airspace of various European countries, including Germany, Belgium, Romania, the United Kingdom, and Moldova. Drones of unknown origin caused chaos at airports and were spotted near military bases. In addition, an [explosion on a railway line](#) between Warsaw and Lublin, a route used for delivering military aid to Ukraine, was assessed by Polish special services as a deliberate act of sabotage. Other hybrid attacks affecting Europe included the spread of fake news about terrorist attacks, cyberattacks on state institutions, coordinated information operations, GPS jamming, incursions by fighter jets and naval vessels.

Despite the escalation of hybrid operations bearing a russian imprint and involving both military and non-military instruments of destabilisation, the reaction of European leaders and of the **EU** as a whole has remained relatively restrained and cautious. In October, the European Commission approved the European Democracy Shield initiative and adopted a new strategy for EU civil society to step up efforts in countering russian disinformation. As part of these initiatives, there are plans to establish a [European Centre](#)

for [Democratic Resilience](#) to counter external information influences. However, these measures are purely defensive in nature and designed for the medium term rather than for an immediate response.

The US factor on the global stage. As noted in previous monitoring reports, Donald Trump's policies have, on the one hand, added turbulence to the global economy and, on the other, complicated US relations with partner countries and international institutions. The current US foreign policy, increasingly personalised in character, has been marked by inconsistency and unpredictability. At the same time, Washington's actions globally reflect a pronounced America-centrism and aggressive promotion of national interests, as interpreted by the current US leadership. Trump's business diplomacy has altered the foundations of partnership with allied states. An isolationist course under the «America First» slogan was declared in the new US [National Security Strategy](#), published in early December 2025 (to be analysed in greater detail in the next monitoring report). The document redefines US geopolitical priorities, raises the prospect of a curtailment of Euro-Atlantic solidarity within NATO, signals Washington's potential distancing from European issues, and may complicate political and economic relations with the European Union.

Furthermore, complex domestic processes are also influencing the United States' global standing and overall image. Public sentiment has been affected by both the consequences of the record-breaking government shutdown (from 1 October to 13 November 2025) and by the lingering momentum of the October mass protests against the president's course. A further indication of dissatisfaction with the Trump's current policy may be seen in the November electoral outcomes: [Democrat Zohran Mamdani won the mayoral election](#) in New York City, while Democratic candidates also prevailed in the gubernatorial elections in Virginia and New Jersey.

Polarisation of the global community. Against the backdrop of growing isolationism in US foreign policy and Washington's disengagement from the global defence of democracy, the military and political integration of authoritarian states has continued,

alongside efforts to expand their influence on the Global South. In particular, military contacts between Russia and North Korea have intensified. According to [unofficial reports](#), about 10,000 North Korean troops have been deployed near the Russian-Ukrainian border. At the same time, Russia is seeking to «internationalise» its intervention in Ukraine by recruiting foreign nationals into its occupation forces. According to the [Ukrainian Foreign Ministry](#), 1,436 citizens from 36 African countries are currently serving in the Russian army.

On 12 November, during a visit to Moscow, the President of Kazakhstan signed a [declaration](#) with the Russian dictator on upgrading bilateral relations to the level of «comprehensive strategic partnership and alliance». On 27 November, a session of the CSTO Collective Security Council was held in Bishkek, approving a plan for the development of military cooperation among member states for 2026-2030 and adopting a joint declaration on the further development of the organisation. Speaking of the efforts by authoritarian states to expand their influence in the Global South, particular attention should be paid to Putin's high-profile visit to India in early December 2025.

FOREIGN POLICY ACTIVITIES OF UKRAINIAN GOVERNMENT

In November 2025, Ukraine's national diplomacy remained focused on securing foreign military and financial aid, protecting national interests in the peace negotiation process, and supporting the energy sector during the winter period. On 14 November 2025, at a [conference](#) with the heads of Ukrainian diplomatic missions, President Zelenskyy outlined priority areas for the diplomatic corps, including: a) strengthening Ukraine's air defence capabilities; b) expanding the participation of countries in the PURL initiative and engaging additional countries in the SAFE programme, which provides for expenditure on joint arms production with Ukraine; c) advancing national interests and initiatives on international platforms, in particular, the return of Ukrainian children abducted by Russia and the protection of human rights in temporarily occupied territories.

Political dialogue with foreign partners.

It is evident that Ukraine's diplomatic efforts focused on security issues and were concentrated on European and American tracks. In November, intensive contacts continued with the leadership of the EU and NATO, other international institutions, and the leaders of different states. In particular, on 16-18 November, a high-level [Ukrainian delegation visited](#) Greece, France, and Spain, resulting in agreements to support Ukraine's defence capabilities, economy, and energy sector. The talks between the presidents of Ukraine and Turkey on 19 November in Istanbul were also of great importance. The following day, consultations were held in Kyiv with an American delegation headed by US Secretary of the Army Daniel Driscoll. On 21-23 November, as part of the peace negotiation process, intensive contacts were held with the President of France, the Prime Minister of the United Kingdom, the Chancellor of Germany, as well as with the leaders of the Nordic and Baltic states. In parallel, Ukrainian and US delegations met in Geneva on 23 November to discuss the US-initiated peace plan. Subsequently, on 25 November, multilateral talks were held within the framework of the [Coalition of the Willing](#), bringing together representatives of 35 countries, including US Secretary of State Marco Rubio. Discussions focused on the principles of a peaceful settlement, long-term financial support for Ukraine and security guarantees for Kyiv.

Other high-level contacts included consultations with the new Prime Minister of Japan; the Presidents of Serbia, Lithuania, Bulgaria, and Romania; and the heads of government of Canada, Poland, Croatia, Luxembourg, and others. The geography of international engagement also included negotiations and consultations with the Presidents of Lebanon, Kenya, the Philippines, and Azerbaijan.

In turn, traditional diplomatic procedures took place in Kyiv in November: the President of Ukraine [accepted the credentials](#) of the newly appointed ambassadors of the United Kingdom, New Zealand, Chile, and Somalia.

Promotion of Ukrainian interests and initiatives globally. In outlining this dimension of

Ukraine's foreign policy activity, attention should be drawn to the following initiatives, launched and/or supported by the Ukrainian side. **First**, on 24 November, Stockholm hosted the [Fourth Parliamentary Summit](#) of the International Crimea Platform, bringing together about 70 parliamentary delegations, including representatives from Europe, Africa, Latin America, Canada, Japan, the United States and New Zealand. The event also welcomed delegations from the parliamentary assemblies of the Council of Europe, the OSCE, NATO, the Nordic Council, the Inter-Parliamentary Union and the European Parliament. The summit adopted a [joint statement](#) reaffirming «unwavering support for the sovereignty, independence, unity and territorial integrity of Ukraine», condemning the ongoing Russian war of aggression and calling for «the withdrawal of all Russian armed forces from the entire territory of Ukraine, the de-occupation and return of all temporarily occupied territories... under the full control of Ukraine». The summit generated significant international attention and was important in the context of the ongoing peace talks.

Second, an important event was the [first Sanctions Summit](#) held in Kyiv on 27 November, attended by more than 60 sanctions envoys from the European Union, the United States, Canada, the United Kingdom and other partners. The main focus was on strengthening, refining and coordinating sanctions policy against the aggressor, as well as optimising restrictive measures against countries that are helping Russia wage war against Ukraine. According to the [Presidential Office](#), in 2025 alone President Zelenskyy signed 56 decrees imposing sanctions, including measures targeting Russian military-industrial complex, shadow fleet, Russian propagandists and the financial sector. Several decrees entered into force in November, synchronising Ukraine's sanctions with those imposed by the US and the EU.

Third, strategically significant were measures aimed at reforming Ukraine's defence sector and integrating the national defence industry into European and global industrial framework. During the meeting of the [NATO-Ukraine Council](#) on 11 November, priorities were defined for the adapted NATO Annual National Programme for 2026, including further implementation of NATO standards, improvement

of the defence procurement model, and creation of a foundation for a strong defence industry. Ukraine and the Alliance are launching the first joint programme, UNITE – Brave NATO, to accelerate defence innovation. In addition, in November, the Ukrainian Ministry of Defence signed [agreements](#) with the defence ministries of the United Kingdom and Norway on the joint production of Ukrainian drones. Ukraine also plans to open two foreign arms sales representative offices in Berlin and Copenhagen this year.

Fourth, in November, under the leadership of the foreign ministers of Ukraine and the United Kingdom, the [first session](#) of the strategic dialogue on the 100 Year Partnership between Ukraine and the United Kingdom took place. Kyiv and London commenced the practical implementation of said agreement. The dialogue agenda includes military and financial support for Ukraine, restoration of energy infrastructure, increased sanctions pressure on the aggressor, and the provision of reliable security guarantees to Ukraine.

International solidarity and assistance to Ukraine in countering russian aggression. During November, allied countries announced additional packages of military, financial and humanitarian aid to Ukraine. In particular, the Bundestag approved a 2026 federal budget providing for a record allocation of [€11.5 billion](#) to Ukraine for artillery systems, drones, armoured vehicles and other equipment. Norway announced its decision to allocate \$7 billion in 2026 for Ukraine's defence needs. The British government approved a transfer of additional Storm Shadow cruise missiles to Ukraine. Several other countries, including Denmark, Estonia, Spain, Norway and Italy, also announced new tranches of military aid to Kyiv. In parallel, the European Investment Bank (EIB) announced the allocation of €100 million to support Ukraine's economic stability and energy infrastructure. In this context, it is of particular geopolitical significance that the governments of Australia and New Zealand have [decided](#) to provide Ukraine with a new military aid package totalling more than \$70 million.

UKRAINE'S STEPS TOWARDS THE EU

During the month, developments on the European track reflected both positive and problematic trends. Progress in European integration may be credited to the continued implementation of EU norms within Ukraine's legislative and regulatory framework. In November, a [new law](#) entered into force establishing an agency responsible for administering and overseeing support programmes in the agricultural sector. At the same time, the Verkhovna Rada passed a law on infrastructure projects in the energy sector, which is of strategic importance for cooperation between Ukraine and the EU in the field of energy.

The principal development, however, was the publication of the European Commission's [annual Enlargement Report](#) on 4 November 2025, which offered positive assessments of Ukraine's progress across most negotiating chapters. In particular, [«accelerated reform progress»](#) was recorded in 15 negotiating chapters, with high level progress noted in 12 of them. The Commission confirmed that conditions were in place to open negotiations with Ukraine on clusters 1, 2 and 6. The next steps include implementing the recommendations set out in the Report and implementing roadmaps on the rule of law, public administration reform, the functioning of democratic institutions, etc.

On the other hand, the issue of a potential «reparations loan» to Ukraine, to be financed from Russia's frozen assets in Europe, remained unresolved. This option, proposed by the European Commission, did not find support from Belgium (where most Russian assets are held) or from European financial institutions. The Commission is therefore preparing [alternative mechanisms](#) for providing financial assistance to Ukraine over the next two years. This matter is particularly pressing given that, according to the [Commission's estimates](#), Ukraine's budget will require €135.7 billion in external assistance in 2026-2027, of which €83.4 billion will be needed for military purposes.

Unfortunately, some problematic factors persist in relations with neighbouring Eastern European countries. Thus, relations with Hungary remain critically strained because of anti-Ukrainian course pursued by Viktor Orbán. Dialogue with the Slovak leadership is also problematic, as it has distanced itself from providing military aid to Kyiv and has adopted a generally detached position regarding the Ukraine war. Following the election of the right-wing politician Karol Nawrocki to the presidency of Poland, and amid rising anti-Ukrainian sentiment within Polish society, long «pause» in high-level contacts has persisted. Meanwhile, the victory of populist forces in the October parliamentary elections in Czech Republic adds uncertainty and difficulty into the dialogue between Kyiv and Prague.

Summing up the events and trends of November 2025, it is necessary to highlight the controversial changes in the geopolitical landscape, including further transformation of US foreign policy (notably the strengthening

of America-centrism and distancing from European problems), continued escalation of Russia's hybrid intervention on Europe, and dangerous polarisation of the global community.

Against this backdrop, the strategic weight and geopolitical significance of the negotiation process aimed at ending the war in Ukraine is growing, albeit under conditions of increasing American pressure on Kyiv. In this situation, it is crucial for Ukraine to resolutely defend its national interests and promote acceptable principles and parameters for a fair and lasting peaceful settlement. A key precondition for achieving this goal is the consolidation of political unity and solidarity with European allies, ensuring joint military and financial support to counter Russian aggression. Considering current reality, partnership with the European Union and Ukraine's accession to the European community acquire a particular weight and significance, constituting a strategic priority for national diplomacy.



DECISIONS AND PROJECTS

Stabilisation of the Ukrainian economy in both wartime and post-war period remains at the centre of attention of international financial institutions. On 17 November, the International Monetary Fund (IMF) mission in Ukraine [commenced discussions](#) with Ukrainian authorities on the launch of a new Extended Fund Facility (EFF) programme. Back in September, the Ukrainian Prime Minister sent a letter to the head of the Fund's mission requesting a [new cooperation programme](#).

The current four-year EFF programme, worth \$15.6 billion, runs until 2027 and had initially envisaged the end of the war by 2026. Under the baseline scenario, it provided for total external financing to Ukraine of **\$115 billion**, rising to **\$140 billion** under an adverse scenario. However, as the war has continued, these figures have been revised upwards to **\$153 billion** and **\$165 billion**, respectively. This demonstrates that international financial institutions are maintaining support for Ukraine while taking into account developments on the battlefield.

In turn, Ukraine must address its own shortcomings without delay. This position has been emphasised by the **IMF** in [its response](#) to the NABU investigation into corruption in the energy sector, noting that continued international support will depend on the effectiveness of anti-corruption reforms.

Meanwhile, the Ukrainian government is introducing new forms of economic incentives. At its meeting on 13 November, the Cabinet of Ministers [approved](#) the inclusion of two additional sites in the Register of Industrial Parks: [Korosten-Podilskyi](#) in Korosten, Zhytomyr oblast, and [Nexus Odesa](#) in the Nerubaiska community, Odesa oblast. The Register of Industrial (Manufacturing) Parks now comprises **109 sites**, the majority of which continue to operate even under wartime conditions.

As noted, Ukraine is interested in Europe's accelerated economic growth, so positive developments in the EU are therefore welcome. [According to Bloomberg](#), the European Commission has revised upwards its economic forecast for the eurozone: EU projections indicate that output in the bloc will grow by 1.4% in 2025 and by the same rate in 2026. For Ukraine, this represents a favourable outlook, as the economic performance of the EU directly affects the partners' capacity to sustain support. This revised forecast reflects optimism that the bloc has weathered the tariff storm triggered earlier by US President Trump better than expected. Although Europe's open economy remains vulnerable to trade wars, the EU retains a competitive advantage over other countries, such as China and India, which are facing higher tariffs.

A significant challenge for European nations is finding the resources necessary to finance defence spending, following the agreement earlier this year by NATO members to allocate 5% of GDP to defence. Of the EU's 27 member states, 23 are NATO members. But even with improved economic dynamics, financing for Ukraine remains a sensitive issue, as not all countries are prepared to support the use of frozen Russian assets to provide a reparations-based loan to Kyiv.

Meanwhile, on 13 November, the European Union announced the [provision](#) of an additional tranche of direct budgetary assistance to Ukraine amounting to nearly €6 billion. These funds will be used to [restore](#) energy infrastructure and stabilise the energy system.

The EU leaders have assured that Europe will:

- ✓ continue to strengthen Ukraine's resilience;
- ✓ compensate for damage caused by Russian strikes, particularly against critical infrastructure;

✓ contribute to the stabilisation of Ukraine's power grid, including by exporting more than **2 gigawatts of electricity** to Ukraine.

DEVELOPMENTS, PROCESSES, TRENDS

The limitations of domestic statistics for obvious reasons provide only a fragmentary picture of the country's industrial activity. International news agencies are not subject to such restrictions, allowing for a more precise assessment of the condition and dynamics of certain sectors – most notably the defence industry.

According to Bloomberg, Ukraine is currently producing up to 4 million UAVs annually, from basic FPV drones to long-range strike systems. This makes the country one of the world's leading drone manufacturers (for comparison, the United States produces approximately 100,000 military drones per year).

This information reflects the peculiarities of Ukraine's military industry, which, as previously noted, has the potential to become a foundation for the broader recovery of domestic industry. According to Bloomberg, the surge in production has been driven by two key factors: the need to respond quickly to Russian aggression and growing demand from NATO countries.

As a result, Ukrainian companies are not only supplying drones to the national armed forces but are also **entering European markets**. Moreover, they are opening production facilities in Europe, forming partnerships with EU-based companies, and attracting foreign investment. Drawing on battlefield experience, Ukrainian engineers are rapidly upgrading UAV models and developing new variants within a matter of months. By contrast, European manufacturers tend to produce more expensive weapons systems in much smaller quantities. Bloomberg also notes that the development of Ukraine's drone market has been facilitated by mass production and comparatively low unit costs.

The condition of the domestic banking system remains a significant indicator of economic activity.

In Q3 2025, Ukrainian banks **increased hryvnia loans** for the third consecutive time, making the main contribution to asset growth in the sector. Lending activity intensified among private companies and selected state-owned enterprises. All groups of banks expanded their portfolios, with state-owned banks recording the most dynamic growth. The annual growth was fastest in the segment of long-term loans for capital investments, with the share of long-term lending exceeding 25% for the first time.

Demand is mainly driven by market-based loans without state support programmes. At the same time, government-backed instruments facilitated the issuance of approximately UAH 5 billion in loans to defence and industrial enterprises.

According to the National Bank of Ukraine (NBU), the share of non-performing loans (NPLs) fell to 25%, the lowest level in the past decade. Excluding legacy problem loans held by state-owned banks, the ratio stands at 14.3%.

According to the NBU, between January and October 2025, the Ukrainian government raised UAH 376.6 billion, \$1.97 billion, and €643.4 million through the placement of domestic government bonds (OVDPs). Since the beginning of the full-scale invasion and until 31 October 2025, the government raised over UAH 1.4 trillion, \$10.3 billion and €3.1 billion at primary auctions.

As emphasised by the NBU, the effective development of the domestic debt market remains one of the key instruments for ensuring macro-financial stability and serves as an alternative to monetary financing of the budget deficit.

The total **portfolio of war bonds** held by individuals and legal entities increased to UAH 172.9 billion in equivalent, representing an increase of UAH 14 billion compared to the previous year. In October 2025, the Ministry of Finance redeemed war bonds worth UAH 3.26 billion and \$350 million.

As of 28 October 2025, Ukraine had received \$37.1 billion in **external financing**. The main source remains the ERA mechanism, which provides loans from G7 member states.

Repayment of these loans is covered by revenues generated from the management of frozen Russian assets.

The total funding under the ERA is \$50 billion, of which \$29 billion has already been disbursed to Ukraine, including \$28.2 billion during the first ten months of 2025. The second largest source of support is the EU's Ukraine Facility programme, which has provided \$7.3 billion since the beginning of the year, including \$6.9 billion in loans and \$0.4 billion in grants. The IMF and the World Bank have provided a further \$0.9 billion and \$0.4 billion, respectively.

Considering changes to the state budget (increasing expenditure by UAH 317 billion, to UAH 4.65 trillion), Ukraine's need for external financing for 2025 is **projected to reach** \$46.3 billion. According to NBU estimates, total international financing by the end of the year could reach \$51.5 billion, which would allow the budget deficit to be fully covered.

However, the debt problem is deepening, as the share of loan-based resources continues to grow. Therefore, the debt echo, although currently «mothballed», may still «explode». This is evidenced by the decision of Fitch Ratings on 14 November to **reaffirm** Ukraine's foreign-currency rating at «Restricted Default» for the third consecutive time.

The long-term rating will remain at this level until Ukraine normalises relations with most of its external commercial creditors. At present, no agreement has been reached with holders of the 2015 sovereign derivatives, also known as GDP warrants. A payment of **\$665 million** due in early June 2025 was missed, and a further round of restructuring negotiations in early November 2025 failed to produce an agreement.

According to the Ministry of Finance, between 16 October and 5 November, Ukraine held limited negotiations with members of the Ad Hoc Committee representing institutional

holders of GDP warrants. Ukraine proposed exchanging the warrants for new Eurobonds, but this proposal was rejected. The investors' counterproposal **proved unacceptable** to Ukraine, particularly due to significantly higher coupon rates (from 5% to 7.75%) and shorter maturities, with the first substantial repayment due as early as 2029. Acceptance of such terms would have jeopardised the country's long-term debt sustainability.

Meanwhile, according to the NBU, **Ukrainian businesses** maintained positive assessments of their economic activity in October 2025 despite intensified shelling, infrastructure destruction and energy shortages. The Business Activity Expectations Index (BAEI) stood at 50.3 (compared to 50.4 in September), marking the eighth consecutive month in which business sentiment remained positive above the 50-point threshold.

Positive sentiment **was supported** by currency market stability, international aid inflows, slowing inflation, active budget financing of infrastructure, and a revival in consumer demand. At the same time, business activity was constrained by energy disruptions, logistical constraints, and labour shortages.

However, the leading sectors of the economy – industry and services – remain under pressure from energy-related risks and high costs. In industry, the BAEI fell to 48.8 points, and in services to 48.7. Both sectors anticipate a reduction in new orders and a persistent labour deficit, although expectations regarding production volumes and services provided remain positive.

As repeatedly emphasised, industry is pivotal for the country's stabilisation trajectory and therefore requires additional attention to preserve positive momentum. One potential avenue could be an increase in defence-related expenditure, including the possibility of exporting part of domestically produced military products.

IV.

ENERGY SECTOR

ENERGY BALANCE

For most of the month, Ukraine's integrated power system (IPS) operated under deficit conditions resulting from seven combined Russian attacks, the largest of which took place on 8, 19 and 29 November. Direct damage to key facilities in frontline regions, primarily in Kharkiv, Poltava, Sumy, and Chernihiv oblasts, as well as to substations of Energoatom and Ukrenergo, thermal power plants operated by DTEK, and equipment belonging to distribution system operators, led to the introduction of scheduled hourly power cuts for one to four groups of household consumers and round-the-clock power restrictions for industry, starting on 8 November in most regions and from 19 November in all regions of Ukraine. In addition, adverse weather conditions caused power outages in six regions, affecting 124 settlements on 18 November.

During the reporting period, the base capacity of Ukraine's IPS was provided by nine NPP units (reduced to five between 19 and 28 November), generating up to 7 GW. Up to 10 power units of TPPs and CHPPs, as well as HPPs and PSPs, which together generated 2.2-2.8 GW of electricity, were the source of manoeuvrable power. Output from renewable energy sources did not exceed **0.8 GW**, largely due to predominantly cloudy weather conditions.

Generation at Ukrhydroenergo facilities in November was limited by water resources, therefore averaged around 0.5 GW. Hydroelectric power was supplied mainly during peak consumption hours and was reduced to 0.3 GW following enemy attacks.

The share of nuclear energy in the generation mix in November ranged within 57-62%, although it declined to 50% after attacks on Energoatom and Ukrenergo substations. TPPs accounted for up to 18% of electricity production, followed by CHPPs (up to 15%), renewables (8-10%), and HPPs (5-6%). Overall, generation volumes in Ukraine amounted to 9-11

GW per hour (6-7 GW after each of the massive attacks), compared to 17 GW in 2021.

During the reporting period, domestic consumers imported 410 GWh of electricity from five neighbouring countries and exported 8 GWh. More than 40% of the resource was supplied by Hungary.

An agreement was reached with ENTSO-E to increase total cross-border import capacity in December from 2.1 GW to 2.3 GW. However, due to existing organisational bottlenecks within the system, no more than 55% of this capacity can be utilised.

After 9 November, **no electricity was exported** from Ukraine, despite a maximum **permitted export capacity** of 0.9 GW. Since 1 August, by agreement among six transmission system operators forming part of the Eastern Europe Capacity Calculation Region (EE CCR), this limit has been reviewed on a monthly basis. The government **plans** to increase export capacity to 1.1 GW by the end of the year.

Coal reserves at TPP and CHPP warehouses have increased to 2.5 million tonnes. However, damaged power units limit the ability to deploy these reserves at scale. Therefore, even existing reserves may be sufficient to get through the entire autumn-winter period of 2025-2026.

After the launch of centralised heating systems, daily gas consumption in Ukraine increased to 60-65 mcm. As domestic production declined to **30-35 mcm per day** due to attacks on sectoral facilities, and imports from Hungary, Poland, and Slovakia did not exceed 20 mcm / day (a total of 620 mcm during the month), withdrawals from underground storage facilities commenced on 4 November – initially at **4-8 mcm / day**, later increasing to **8-12 mcm**.

As a result, **Ukrainian gas reserves** decreased by 1% compared to the previous

month, reaching 8.4 bcm, excluding 4.1 bcm classified as «long-term storage» gas; 0.6 bcm formally designated as «buffer gas»; and 0.1 bcm belonging to non-residents. Although this level exceeds last year's by 6%, it remains 16% lower than in 2015–2018.

While the target level of **13.2 bcm** (including technological volumes) had been reached several days before the government's planned deadline of 1 November, renewed russian attacks necessitated the formation of an additional safety reserve of **1.5–2.0 bcm**. As the Naftogaz Group had the capacity to procure no more than 70% of the required volume, it signed a grant agreement worth **€127 million** with the European Investment Bank (in addition to the €300 million received in October), while the government allocated **UAH 8.4 billion** from the state budget reserve fund to support additional purchases.

PROBLEMS AND SOLUTIONS

On 10 November 2025, the National Anti-Corruption Bureau of Ukraine (NABU) and the Specialised Anti-Corruption Prosecutors Office (SAPO) **announced** a «large-scale operation to expose corruption in the energy sector». The investigation concerned a «high-level criminal organisation» whose members «had built an extensive corruption scheme to influence strategic state-owned enterprises, including Energoatom». They were managed «not by officially appointed executives but by external individuals with no formal authority». Members of the organisation systematically received illegal benefits from contractors of strategic enterprises, coercing them into paying kickbacks amounting to 10–15% of the contract value in order to avoid losing their supplier status or having payments for services or products blocked. It has been **documented** that funds were transferred to a former Deputy Prime Minister and that appointments to political offices – including that of Minister of Energy – were coordinated within the framework of this scheme.

In response to the investigation, the President of Ukraine initiated personnel changes within the executive branch, including at the Ministry of Energy, NEURC, the State Nuclear Regulatory Inspectorate, and the State Energy Inspection. Parliament

dismissed the ministers of justice and energy from their posts, while the government announced a «reset» of Energoatom, prematurely terminating the mandate of its supervisory board and scheduling a financial audit of its activities. **Further measures** are envisaged to renew the composition of supervisory boards and executive bodies of enterprises in fuel and energy complex. Supervisory boards, including those of Naftogaz Ukraine and Ukrhydroenergo, have been instructed to report monthly to the Cabinet of Ministers on oversight of executive bodies, compliance with anti-corruption policy, procurement procedures, financial and budgetary discipline, legal transactions and internal control mechanisms.

While these steps contribute to cleansing the sector of unscrupulous managers, they also temporarily complicate coordination efforts aimed at ensuring the stable and reliable functioning of the energy sector, as senior leadership attention has been redirected towards resolving governance issues.

PROGRESS OF THE HEATING SEASON

The heating season has commenced across most of Ukraine; however, its course has been complicated by damage to critical infrastructure caused by russian shelling and, as a result, by shortages in generation, transmission, transportation and distribution capacity.

The season **officially started** on 28 October (with social facilities connected in mid-October). Decisions regarding the specific start date for centralised heating systems were made by local self-government bodies based on available technical capacity and weather conditions (the average daily air temperature had to remain below +8°C for three consecutive days).

At present, most households are receiving centralised heating services: 98% of boiler houses prepared for the season are in operation. At the same time, «the lowest connection rate is in the southern regions, where weather **conditions remain milder**». Overall, as of 28 November, 96% of multi-apartment residential buildings and 98% of social facilities have been **connected** to heating networks and systems nationwide.

At a meeting of the Anti-Crisis Energy Headquarters, it was **emphasised** that the government is considering «various contingency scenarios to ensure effective and prompt response. The focus is on the availability of reserves, fuel stocks, and the uninterrupted operation of the Points of Invincibility (emergency resilience centres). Special attention is being paid to the physical protection of energy facilities. Work in this direction continues on a daily basis».

Enemy attacks remain a key threat, inflicting daily damage to Ukraine's energy system, boiler houses, electricity and heating networks, especially in frontline areas. In some cities, including Kharkiv, Kyiv, Odesa, Chernihiv, Kryvyi Rih, Kremenchuk, Fastiv, Slavutych, tens, if not hundreds, of thousands of consumers periodically experience interruptions to heat and/or electricity supply.

In particular, following the attack during the night of 19 November, when the Khmelnytsky, Rivne and Pivdenoukraisn nuclear power plants lost connection to high-voltage transmission lines, four of the nine operating reactors were temporarily derated by 1.2 GW on the instruction of Ukrenergo. This caused emergency power outages in almost all regions of Ukraine. A similar incident occurred on 8 November, but this time the impact was limited to a reduction in generation. Three of the four units suspended on 19 November returned to full capacity only nine days later, while the fourth unit (KHAES-2) remained underloaded by 200-400 MW due to technical issues.

Repair works, which, given the Russian tactic of combined and repeated strikes, must be carried out almost continuously, are complicated by the wear and tear of networks and systems and the lack of material resources, caused, among other things, by the large debts of balancing market participants to each other and of heat and power companies to natural gas suppliers.

Among the measures undertaken in November to achieve the government's objectives and address the challenges facing the fuel and energy complex, the following are worth noting:

- ✓ **approval** of the procedure for granting state financial support (through partial compensation of the principal loan amount) to individuals installing generating units based on renewable energy sources in private households. Support will be provided by the Entrepreneurship Development Fund in the form of compensation covering 30% of the principal loan amount. The maximum loan amount may not exceed UAH 480,000 for the purchase and installation of a hybrid power supply system;

- ✓ increase in the authorised capital of the State Institution «Energy Efficiency Fund» by UAH 240 million alongside amendments to its statute extending its mandate to programmes in the residential sector, including those related to the restoration of destroyed and/or damaged buildings. This is expected to attract an additional **€20 million** in donor funding and finance **328 projects**, including **144 projects** under the «Enerhodim» programme (amounting to **UAH 125 million**);

- ✓ allocation of UAH 39.7 million from the state budget reserve fund for measures aimed at preventing potential man-made emergencies in the event of power outages at critical fuel and energy infrastructure facilities in Kherson oblast;

- ✓ provision of UAH 50 million in subventions from the 2025 state budget to local communities in Vinnytsia, Dnipropetrovsk, Poltava and Kharkiv oblasts as part of the Renewable Energy Solutions (RES) project;

- ✓ removal of the minimum 1 MW capacity threshold for gas-piston and gas-turbine units, including cogeneration facilities, modular boiler houses, diesel, petrol and gas generators, as well as energy storage installations, which are built and/or deployed by business entities under a simplified procedure;

- ✓ **approval** of the Technical Regulation establishing requirements for alternative motor fuels produced and supplied on the market for use in internal combustion engines adapted for such fuels (effective 20 November 2026);

- ✓ **approval** of the Procedure for monitoring and maintaining a register of state authorities

and local self-government bodies that have implemented energy management systems. The document aims to ensure the collection, systematisation and analysis of information on the introduction and functioning of such systems, to be overseen by the State Agency on Energy Efficiency;

- ✓ establishment of organisational and methodological requirements for cyber protection of critical infrastructure facilities, which are mandatory for its operators, as well as owners or administrators of critical information infrastructure;

- ✓ increase in compensation for owners of generators assisting in powering mobile network towers during electricity supply restrictions. Compensation for diesel generators will amount to UAH 172-197 UAH/hour, and for petrol generators – UAH 287-330 UAH/hour, with higher rates applicable within the 30-kilometre zone from the frontline.

The Cabinet of Ministers reports that:

- ✓ 1.8 GW of distributed generation capacity has been **commissioned**, and «capacity expansion continues»;

- ✓ an additional UAH 1 billion has been **allocated** to eliminate the consequences of enemy strikes and repair networks and systems in 93 frontline communities;

- ✓ more than 190 cogeneration units and 140 modular boiler rooms have been **prepared** for operation (more precisely, 194 units and 147 boiler houses, with a total capacity of 149 MW and 292 MW, respectively, as **reported** on 21 October);

- ✓ as part of the Winter Support programme, compensation for electricity payments has been **provided** to over 280,000 households;

- ✓ the State Energy Efficiency Programme has been launched to compensate 12% of the interest rate on loans issued by partner banks for improving energy efficiency, modernising water supply and energy generation systems, including from renewable sources, as well as implementing energy service projects.

- ✓ since June 2024, Ukrainian banks have **financed** projects worth UAH 32.2 billion,

including the construction of 1.2 GW of new generation capacity and 484 MW of energy storage facilities.

Despite these achievements, the government has yet to:

- ✓ unblock investment, particularly private capital, for the rapid development of distributed generation in large cities, local communities and industrial areas; simplify conditions and reduce the cost of connecting existing facilities to networks and systems; implement sustainable partnership mechanisms between businesses, local communities and energy companies (including through public-private partnerships, ESCO models, energy cooperatives);

- ✓ resolve the accumulated creditor indebtedness of enterprises engaged in the production, transportation and supply of thermal energy to consumers. At the same time, contrary to earlier assurances, prices of natural gas for such enterprises have been raised by 14-17% from 1 November compared to October levels.

- ✓ adopt «**decisions** that would provide households with confidence that, even under current conditions, heat and electricity will remain affordable». This concerns a comprehensive solution on compensating tariff differentials in district heating and the introduction of a moratorium on the disconnection of water and electricity supply in frontline communities due to arrears.

- ✓ extent the **exemption** from import duties and value added tax for goods imported under the **list** approved by the Cabinet of Ministers and placed under the customs regime of import within agreements financed by the Secretariat of the Energy Community.

CONCLUSIONS AND RECOMMENDATIONS

In November, the Russian aggressor appeared to have finalised its tactics for attacking Ukraine's critical infrastructure during the autumn-winter period of 2025-2026. Analysis of previous strikes suggests that they are likely to be conducted every 9-10 days, employing various types of weaponry, targeting different regions in sequence and predominantly occurring at night. Ballistic missiles

are expected to target primarily Ukrenergo and Energoatom substations with second-level protection. Sea- and air-launched cruise missiles are likely to target machine rooms of TPPs, CHPPs, HPPs and PSPs. Unmanned aerial vehicles are expected to be deployed against particularly vulnerable equipment at virtually all categories of critical infrastructure facilities. At the same time, the enemy is likely to concentrate different types of strike assets in order to overload missile and air defence systems, while extending the duration of attacks to complicate the operations of air defence units and mobile fire groups.

The aggressor's main objective is likely to remain the division of Ukraine's energy system along the Dnipro River, effectively splitting it in two, while simultaneously isolating peripheral subsystems – particularly those whose operation depends on one or two large TPPs or CHPPs.

Although energy companies will continue restoring damaged facilities in between Russian attacks, a 10-day window is not enough to fully repair and/or replace large equipment, especially when it comes to TPP and CHPP power units, main, distribution or support substations. Therefore, even if organisational restrictions on electricity imports are lifted, shortages in generation, transmission and distribution capacity in Ukraine's IPS are likely to increase gradually, especially in the Left Bank regions.

The autumn attacks have clearly demonstrated that ensuring the availability of 17.6 GW of capacity or maintaining 13.2 bcm of gas in storage is insufficient preparation for the heating season. The flawed strategy of merely «surviving another winter that will be harder than the previous one» must be abandoned.

Nevertheless, the government's focus remains largely on the «availability of reserves, fuel stocks, and uninterrupted operation of Points of Invincibility», while the proclaimed «effective operational response» tends to consist not in the formulation of a robust security policy but in the establishment of ever more «anti-crisis headquarters», now also at the regional level.

Concentrating efforts on the continuous restoration of TPPs and CHPPs and on building

stockpiles and reserves according to peacetime standards constitutes a losing strategy.

The growing capacity deficit within Ukraine's integrated power system, driven by Russian strikes, can be halted only by:

- ✓ saturating the system with 500+ small energy units, mainly cogeneration facilities, with a guaranteed capacities ranging from >1 to 10 (100) MW, operating on locally available fuel; integrating them into distribution micro grid systems based on smart grid technologies; connecting them to IPS as elements of the ancillary services market;

- ✓ ensuring genuine, rather than fictitious, simplification of the construction, siting and commissioning of gas-piston and gas-turbine units, including cogeneration facilities, as well as procedures for connecting this and other energy equipment to electricity, gas, and heating networks;

- ✓ restoring the operation of all energy facilities, including mini-HPPs and low-capacity TPPs and CHPPs, that previously met the needs of enterprises and were shut down due to inefficiency, fuel shortages, court rulings and other constraints, and connecting them to distribution systems at the request of military administrations;

- ✓ reducing the lists of protected consumers, two-thirds of whom do not qualify as critical infrastructure enterprises;

- ✓ encouraging local communities, budgetary institutions and organisations to achieve real energy autonomy, rather than purchasing photovoltaic panels and fostering fragmented forms of «energy separatism»;

- ✓ guaranteeing the solvency of all participants in the energy value chain, thereby enabling the proper functioning of transmission and distribution systems across all energy markets;

- ✓ directing financial assistance from international partners not only towards the purchase of natural gas, but also towards the procurement, commissioning, and grid integration of **1.4 GW of highly manoeuvrable power plants, 1.1 GW of biofuel-based generation, and 0.8 GW of energy storage systems.**

V.

SOCIAL POLICY

Ukraine's [labour market](#) is entering a period of structural labour shortage. Companies are already facing a deficit of skilled workers, engineers and specialists, whose numbers have declined due to mobilisation and migration. According to the State Employment Service, as of 1 October, there were [143,000 job seekers registered](#) in Ukraine, of whom only 93,000 held official unemployed status. There are more than two vacancies per unemployed person: the Unified Jobs Portal currently lists approximately 240,000 vacancies. While businesses are willing to pay more, they simply cannot find people.

In response, the Cabinet of Ministers has adopted a [resolution](#) establishing the digital employment ecosystem «Obrii» (Horizon), which will be integrated into the «Diia» app and portal.

The Obrii system is a state platform (service) designed to comprehensively address the needs of the Ukrainian labour market by integrating various tools for job search, recruitment, training and skills development. In effect, this represents the first attempt by the state to create a unified register of citizens who are not officially employed and to facilitate their reintegration into the labour market.

From 1 January 2026, the system will automatically generate profiles of individuals for whom no unified social contributions (ESV) have been paid for two months. Data will be sourced from the Pension Fund, the State Statistics Service, the Ministry of Social Policy and educational registers. The launch of Obrii is a significant step towards the digitalisation of the labour market. Its operation will depend on data integration and the functioning of artificial intelligence tools, with the system operating based on automated verification mechanisms. The main components and functions of Obrii will include the following:

1. Job search and recruitment:

✓ The platform allows citizens to create profiles, upload CVs and search for vacancies in both the public sector and private business.

✓ Employers are provided with automated candidate matching tools, as well as functions for tracking applications and analysing labour market statistics.

2. Digital learning and skills development:

✓ Obrii integrates online courses and professional retraining programmes aimed at upgrading qualifications and adapting skills to current labour market needs.

✓ Special attention is given to forced migrants and internally displaced persons who need rapid retraining or employment.

3. Analytics and the labour market:

✓ The platform collects data on job vacancies, skills, occupational demand and employment dynamics, enabling public authorities and employers to make informed decisions.

4. Integration with public services:

✓ Obrii links the service to other government platforms (e.g., for registering unemployed persons, receiving unemployment benefits, or obtaining government grants for education), thereby creating a unified digital employment ecosystem.

During the first two years, the platform will operate in a pilot mode without the direct participation of employers. Subsequently, Obrii may evolve into the country's largest human resources database, providing detailed analytics on shortage occupations in each region. At the same time, concerns have been

voiced that while the new digital service may revitalise Ukraine's labour market, it could also become an instrument of pressure on citizens who are capable of working but choose not to engage in formal employment.

The President of Ukraine signed Law No. 4607-IX (draft law No. 11377) on the Unified Information System for the Social Sphere (UISSS), aimed at automating social support processes and strengthening the protection of citizens' personal data. The law is intended to replace dozens of previously existing, fragmented and often outdated systems. Its objective is to establish an integrated reference and information environment that consolidates all electronic information resources within the social sphere, including state registers, databases and social protection services. It defines the legal and organisational framework for the functioning of the UISSS, which provides for the centralised collection, processing, storage and accounting of electronic data relating to all recipients of social support. The system is designed to ensure data standardisation, interoperability between registers, and improved transparency and accessibility of social services.

The UISSS will centralise the collection, storage and processing of data on all individuals entitled to, or receiving, social assistance. Key changes include the integration of more than thirty existing social sector registers and databases; the elimination

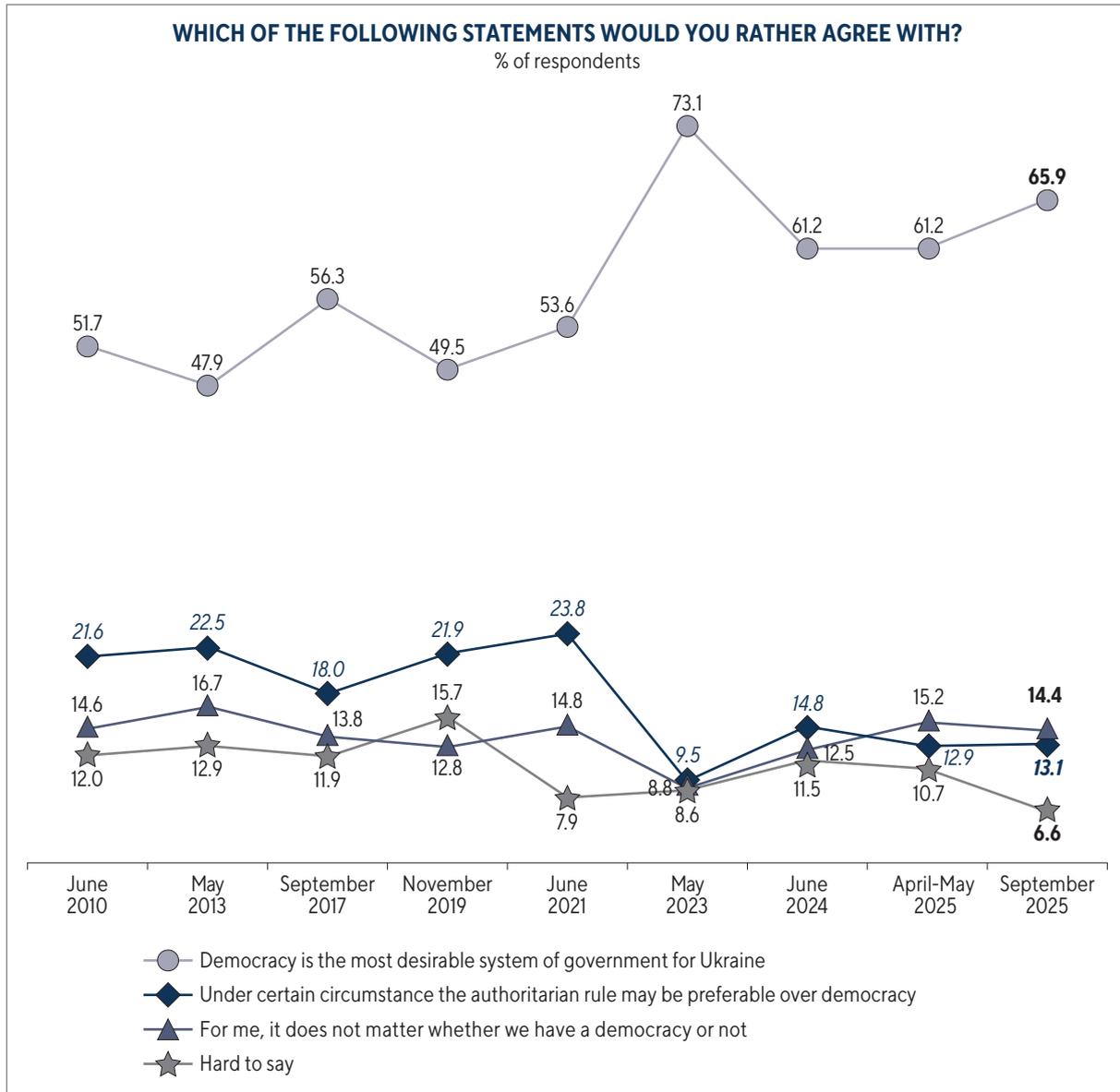
of duplicate payments and data inconsistencies that have often led to unnecessary inspections or unjustified delays; the creation of a «social history» for each individual, similar to a medical record, enabling comprehensive tracking of all forms of social support provided; and increased operational efficiency through the automation of procedures.

The Law also provides for the mandatory use of the UISSS by local self-government bodies and state authorities in the delivery of social services. It clearly delineates the functions of system participants, including central executive authorities, local administrations and authorised providers responsible for safeguarding the rights of beneficiaries. Provisions require that system interfaces be adapted to meet the needs of persons with disabilities.

The adoption of this Law offers many advantages, as it standardises data, simplifies access to social services, reduces duplication of information and improves the targeting of assistance through more accurate data and automated verification. At the same time, the new legislation entails risks, as the centralisation of large volumes of sensitive personal data increases cybersecurity requirements, raises the possibility of technical failures or misuse of access, and may exacerbate digital inequality for individuals lacking the skills or resources to use electronic services effectively.

V.

CITIZENS' OPINIONS ABOUT CURRENT ISSUES¹



¹ Results of a sociological survey conducted by the with Razumkov Centre’s sociological service on 12-17 September 2025 jointly with the Kyiv Security Forum.

The face-to-face survey was conducted in Vinnytsia, Volyn, Dnipropetrovsk, Donetsk, 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 – only in government-controlled areas not subject to hostilities.

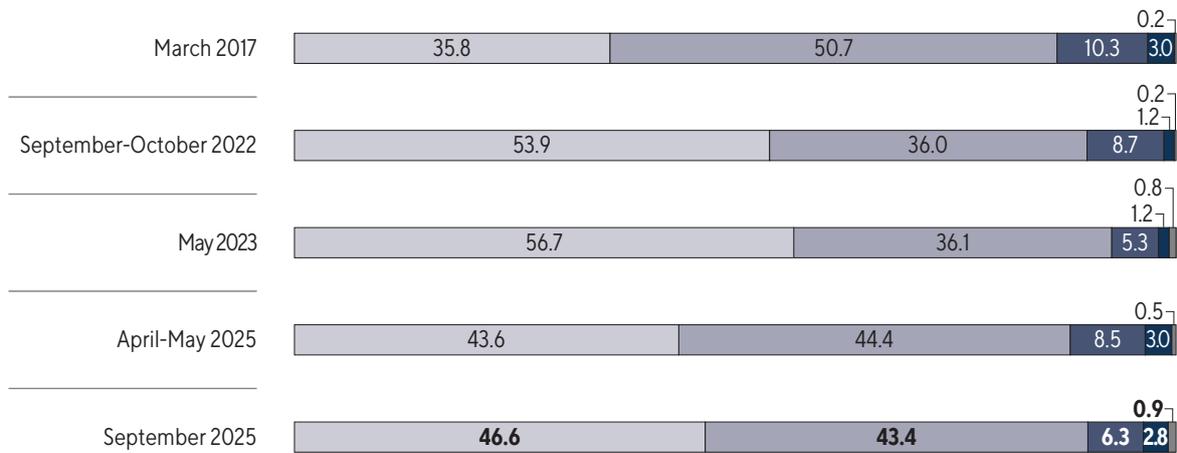
The survey was based on a stratified multi-stage sampling method with random selection at the initial sampling stages and quota selection of respondents at the final stage (when respondents were selected based on gender and age quotas). The sample structure reflects the demographic structure of the adult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

A total of 1,210 respondents aged 18+ were interviewed. The theoretical sampling error does not exceed 2.9%. Additional systematic sampling deviations may be caused by the effects of russian aggression, in particular, the forced evacuation of millions of citizens.

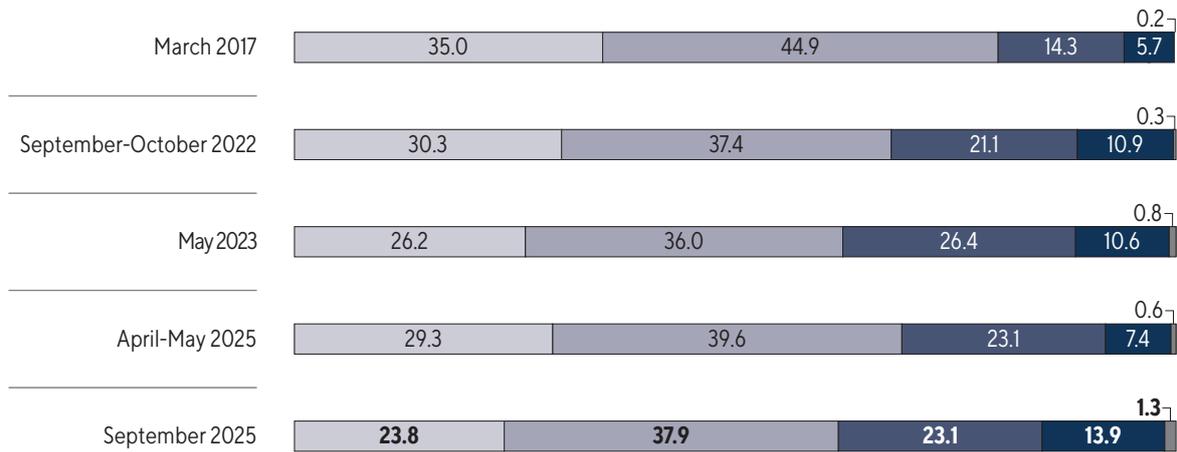
HOW GOOD FOR OUR COUNTRY ARE THESE TYPES OF POLITICAL SYSTEMS?

% of respondents

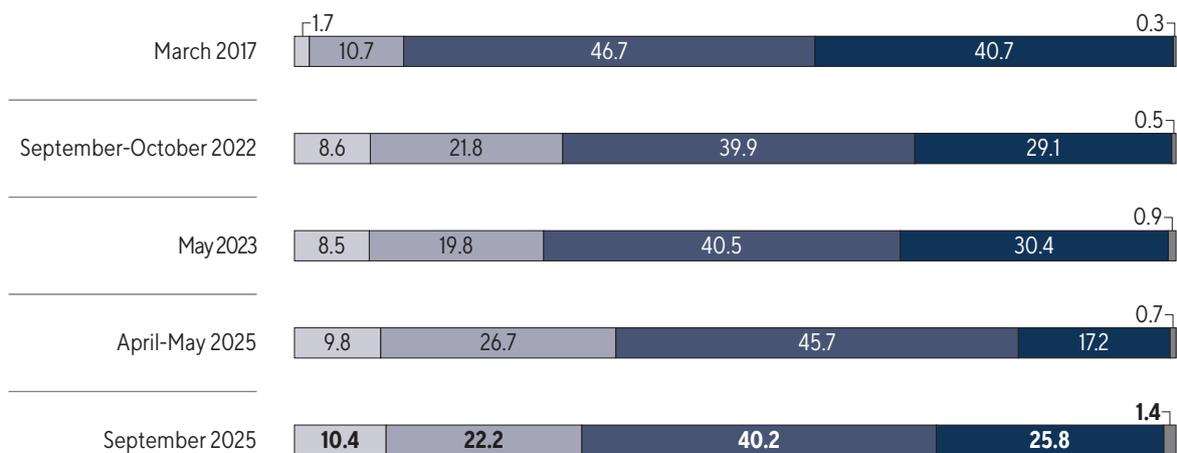
Democratic political system



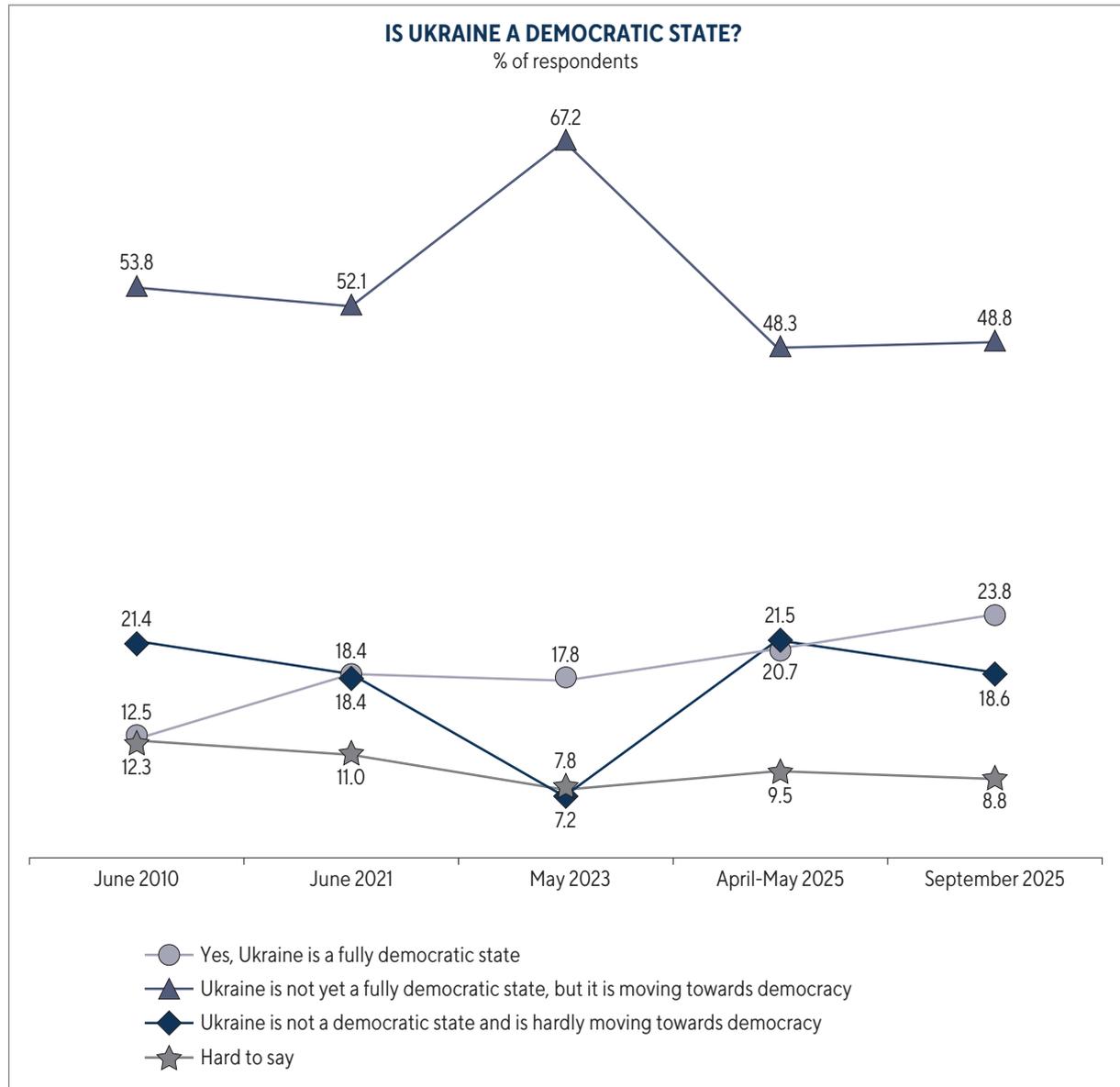
A strong leader independent of parliaments and elections



Country ruled by the military or a military regime



Very good Rather good Rather bad Very bad No answer



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