

# NEWSLETTER

## UKRAINE

Dariia Mykhailyshyna

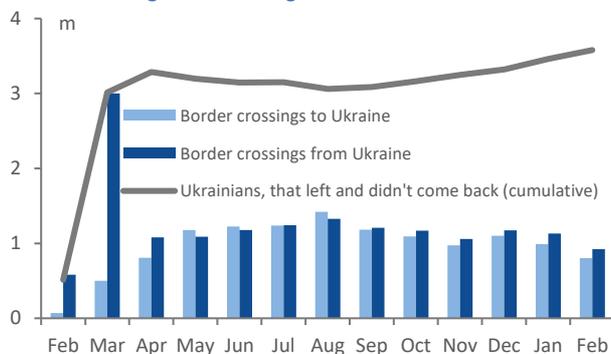
### A survey of Ukrainian refugees

Millions of Ukrainians had to abandon their home and moved abroad due to Russia's full-scale invasion. However, data on their living conditions and their plans for the future are scarce. To get a better insight into these indicators and their impact on Ukraine's economy, the Centre for Economic Strategy (CES) has recently commissioned a survey of refugees. While the survey cannot give an exact number of refugees, it displays the age, gender, employment and education status. Furthermore, it allows to identify four groups of refugees with different socio-economic characteristics. Due to this development, Ukraine's GDP is estimated to have lost between 2.6% and 7.7% of its pre-war level.

#### Background

According to estimates based on UNHCR and other data sources, between 5.3 m and 6.2 m of Ukrainians moved and still stay abroad since Russia's invasion, but the exact number is difficult to assess due to uncertainty of the number of refugees in Russia. Around 3.6 m have crossed borders with Ukraine's EU neighbours and Moldova and until now did not return.

#### Border crossings with EU neighbours and Moldova



Source: The UN Refugee Agency, based on data from government agencies in Poland, Slovakia, Hungary and Moldova.

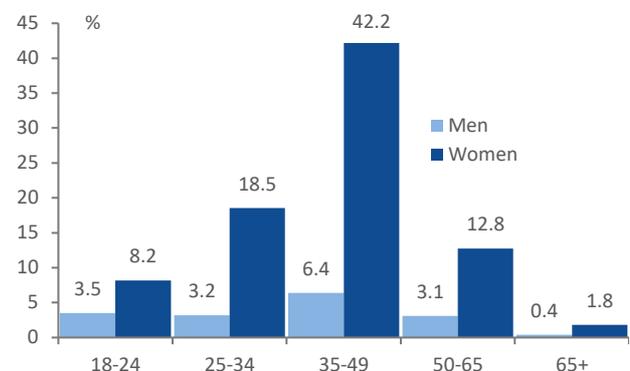
While most of the refugees left Ukraine in February and March 2022, throughout the summer more people returned than left. However, since Russia has launched missile attacks on Ukraine's energy infrastructure in October, this trend has reversed.

#### Conduct of a survey

To get a clearer picture of the refugees' characteristics, a survey took place online in November to December 2022, commissioned by the Centre for Economic Strategy, and conducted by the Ukrainian "Info Sapiens" research agency. 1003 Ukrainian adults (18+) were surveyed from all Ukrainian regions, who were living abroad (except those in Russia and Belarus). Most came from Kyiv

(around 14% of the sample), followed by the Dnipropetrovsk oblast (12%), Kharkiv (11%) and Zaporizhzhia (9%). To ensure representativeness, respondents were randomly selected among customers of Kyivstar (the largest Ukrainian telecommunications company), who were abroad at the time of the survey and quotas based on the number of Ukrainian Kyivstar customers in different countries abroad were applied. Those who were selected received an SMS with an invitation to complete the survey. Overall, 83% of the adult refugees are women and most of them are in the age group below 65.

#### Age and gender structure



Source: Info Sapiens poll, commissioned by CES

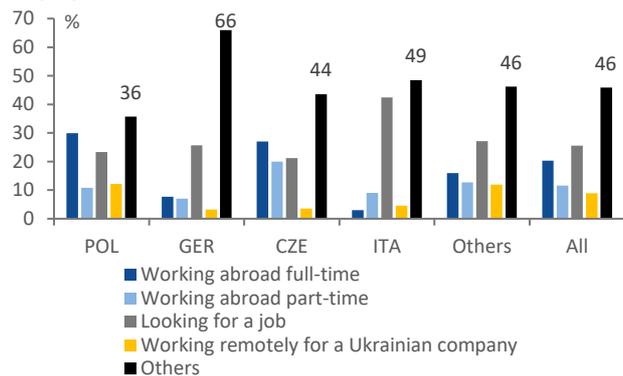
#### Education level

Around 69% of Ukrainian refugees surveyed have higher education. This share is extremely high compared to 29% in the total Ukrainian workforce and 33% in the EU workforce. Moreover, 20% of refugees have specialized secondary education, 9% have general secondary education and roughly 2% have less than secondary education.

#### Employment status

According to the survey, 20% of Ukrainian refugees are working abroad in full-time and 12% in part-time. Around 9% of refugees work remotely for a Ukrainian company and 26% are looking for a job abroad. Out of the countries with the most Ukrainian refugees, Czechia has the highest proportion of Ukrainians working (47%), Poland is second (41%), while in Germany and Italy these numbers are much lower. The share of refugees that work remotely for a company from Ukraine is much higher in Poland (12%) than in Germany (3%), the Czech Republic (4%) or Italy (5%). Here, the scale of social assistance presumably plays an important role and the conditions of the local labour markets. Overall, 73% of Ukrainian refugees have received some form of social assistance in their host countries.

Employment status



Source: Info Sapiens poll, commissioned by CES, refugees could select different options therefore the sum exceeds 100%.

Cluster analysis

The survey results also allowed to perform cluster analysis indicating four groups of refugees. These groups are distinguished particularly in the extent of adaption to life abroad and their employment attitude.

Results of the cluster analysis: four groups of refugees

Group	%	Life abroad	Country	Employment
A	25	Mostly not adapted, not willing to adapt	Mostly POL	Less likely to work or learn foreign language
B	29	Mostly friends/family abroad, knowledge of foreign language	Mostly choose country	More likely to work
C	29	Mostly have friends/family abroad, knowledge of foreign language	Mostly choose country	More likely to work at the pre-war occupation, less likely at a different occupation
D	16	Mostly not adapted, but willing to adapt	Mostly GER	More likely to work and learn foreign language

Source: Info Sapiens poll, commissioned by CES

However, they are similar in their willingness to return. In each group ca. 70% state that they will definitely, or more likely to return than not, while around 30% does not agree with this statement.

Outlook

According to the survey results, after the war between 0.9 and 2.7 m Ukrainians may remain abroad. In addition, between 100 and 700 thsd. Ukrainians may leave after the war ends to reunite with their families abroad. Younger people and people with higher education are

relatively more likely to remain abroad after the war. The most important factor that could incentivize Ukrainians to return is the end of the war, the end of missile strikes and combat activities in the person’s native region (in total 85%). The estimated GDP loss amounts between 2.6% and 7.7% of the pre-war GDP. Thus, the loss contributes between 9% and 26% to the GDP decline in 2022. To ensure that more Ukrainians return, the infrastructure and the housing destroyed by the war must be rebuilt swiftly. Meanwhile, people from the most severely affected regions should be offered some kind of assistance: either monetary or housing which could be provided either by the Ukrainian government or by international organizations. In addition, retraining programmes in relatively safe regions of Ukraine could help to equip people with new skills, which in turn would help them to find a new well-paid job.

Dariia Mykhailyshyna is Non-resident Fellow at the Centre for Economic Strategy

This newsletter is based on [a survey by the Centre for Economic Strategy](#)