

KEY POLICY DEVELOPMENTS IN EDUCATION, TRAINING AND EMPLOYMENT – UKRAINE 2022

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EXECUTIVE SUMMARY

On 24 February 2022 Russia invaded Ukraine in the ultimate escalation of the Russian-Ukrainian conflict that began in 2014. This has resulted in a devastating humanitarian crisis, causing widespread loss of life, destruction of infrastructure and human suffering. The invasion has triggered Europe's fastest-growing refugee crisis since World War II, with (as of mid-September) more than 7 million Ukrainians fleeing the country and a third of the population displaced.

Before the invasion, Ukraine's economy had been on a recovery path after the COVID-19 pandemic. After falling by 4% in 2020, real GDP grew by 3.2% in 2021 thanks to a record grain harvest and strong consumer spending (IMF). Current estimates show a GDP contraction ranging between -35% and -45% (IMF and World Bank, 2022). The State Statistical Service of Ukraine announced a GDP decline of -15.1% in the first quarter of 2022. Over 30% of all jobs have been lost since the outbreak of the war.

More than 1 800 education and training institutions have been damaged, among which more than 100 VET schools and more than 130 educational institutions have been destroyed completely. The cumulative learning losses due to extended lockdowns during the pandemic and due to the war are estimated to be more than one school year, while the projected loss in future earnings per student is estimated at over 10%.

On 15 March 2022, the Ministry of Education and Science (MoES) presented its Emergency Plan, highlighting the requirement to mitigate the immediate effects of the war and to increase resilience in the education sector. The MoES highlighted, among others, the forced displacement of people to Western Ukraine, the limited access of learners to education and the destruction of infrastructure and educational facilities as major key issues. The MoES called upon development partners to provide assistance. It also ensured teaching continuity, and learning continued in safe conditions for students and teachers.

The experience with distance and e-learning acquired during the COVID-19 pandemic has been integrated into the current provision of education and training. Due to the damaged infrastructure and the ongoing war, education is mainly delivered as distance learning through education platforms. In 18 of the 25 Ukrainian regions, VET is provided completely via remote training. In the seven remaining regions, it is organised as blended learning.

Ukraine applied to join the EU four days after the Russian invasion. The Council of the EU responded swiftly by inviting the European Commission to submit its opinion on Ukraine's application. On 17 June 2022, the European Commission recommended that Ukraine should be given the prospect of joining of the European Union and should be granted candidate status on the understanding that steps are taken in a number of areas.

The EU has mobilised around EUR 4.1 billion to support Ukraine's overall economic, social and financial resilience in the form of macro-financial assistance, budget support, emergency assistance, crisis response and humanitarian aid. Under the European Peace Facility, amounting to EUR 1.5 billion, military assistance measures have been provided and the mobilisation of an additional EUR 500 million is under way.

The ETF is monitoring and collecting data to track and review the impact of the invasion on the movement of people, the consequences for workers and the labour market, and the effect on schools and education. The information is compiled into an updated report providing a weekly snapshot of how the situation is unfolding. It also provides insights on what the future may hold in terms of reconstruction costs, recovery of the business sector and the long-term impact on education.

1. KEY POLITICAL, DEMOGRAPHIC, ECONOMIC AND SOCIAL CHARACTERISTICS

Political developments

Ukraine marked its 30-year anniversary of statehood in 2021. Over these past three decades, the country's progress has been marked by instability and political turbulence, including two separate revolutions.

On 24 February 2022, Russia invaded Ukraine in the ultimate escalation of the Russian-Ukrainian conflict that began in 2014, which has resulted in a devastating humanitarian crisis, causing widespread loss of life, destruction of infrastructure and human suffering.

As a reaction to the attack, the President of Ukraine declared martial law throughout Ukraine and a general mobilisation on 24 February 2022. This state has recently been extended until 21 November 2022. Martial law includes, among others, restrictions of the constitutional rights and freedoms of citizens, such as the prohibition for Ukrainian men between 18 and 60 to leave the country.

Ukraine applied to join the EU four days after the Russian invasion, and on 23 June 2022 the European Parliament adopted a resolution calling for the immediate granting of candidate status for EU membership to Ukraine. On the same day, the European Council granted Ukraine candidate status for accession to the EU. In its assessment concerning Ukraine's EU membership application, the European Commission is requesting the Ukrainian authorities to pursue a reform and reconstruction agenda focused on improving the functioning of the market economy and labour market flexibility, strengthening private property rights, improving educational outcomes and innovation as well as upgrading infrastructure and physical capital.

The EU has provided more than EUR 19.7 billion to support Ukraine's overall economic, social and financial resilience. In addition, EUR 3.1 billion have been provided under the European Peace Facility (European Commission, EU Solidarity to Ukraine, 2022).

Demographics

Ukraine's population is falling on an unparalleled scale and at an unprecedented rate compared with its neighbours. The country's population decreased from 50 million in 1999 to less than 44 million in 2020. According to the UN's World Population Prospects, the population will further decline by more than 15% by 2050 (UN, 2017). The proportion of its young population (aged 0 to 19) was 20.5% in 2020, the lowest among the Eastern Partnership countries (ETF, 2021).

Ukraine has a long history of being a country of origin, transit and destination for migrants. As a result, between 1990 and 2020, the country has been on the top-20 list of migrant countries worldwide as defined by place of birth and residency. In 2020, 6.1 million people born in Ukraine resided outside the country, while 5 million foreign-born people lived in Ukraine, equivalent to 11% of the population. COVID-19 has had a harsh, immediate impact on migration in Ukraine (particularly for seasonal and informal workers) and between 300 000 and 400 000 migrant workers returned to Ukraine (ETF, September 2021).

The Russian invasion in Ukraine has caused Europe's fastest-growing refugee crisis since World War II. As of mid-June, more than 7.5 million Ukrainians had fled the country and a third of the population had been displaced (UNHCR, September 2022). According to various estimates, the majority of internally and externally displaced Ukrainians are women, around 50% of which are highly skilled, and many of whom became unemployed or inactive due to the war.

The majority of refugees directly entered neighbouring nations to the west of Ukraine. Poland has received 3.9 million refugees from Ukraine. Other countries neighbouring Ukraine having received refugees are Romania, Moldova, Hungary and Slovakia. Some refugees then moved further west to other European countries and, to a lesser extent, elsewhere (IOM, June 2022). According to the ILO,

approximately 1.2 million of the refugees were working prior to the aggression. Two-thirds of those have an advanced (tertiary) level of education and 49% were employed in highly skilled occupations. Most of the refugee population are women with children (ILO, May 2022).

Key economic developments

The modern economic history of Ukraine can be divided into three periods: (1) a decade of economic collapse following independence in the 1990s; (2) a period of stabilisation interrupted by a sharp recession in 2009, followed by a quick recovery (2000-2014); and finally, (3) the post-Euromaidan era (2014-early 2022) which has seen mild recovery from a 2-year recession (2014-2015). All three periods have seen significant downturns, with only the early-mid 2000s seeing substantial growth (ETF, 2022).

There is now a fourth period as a result of the country's invasion in February 2022. The war in Ukraine has diverted resources from production to destruction. Due to the damage to infrastructure and the closure of businesses, economic activity is at a standstill in large parts of the country. Tentative estimates suggest that 50% of enterprises are closed (ILO, May 2022). Economic growth has been reversed due to capital flight, the destruction of assets and a corresponding reduction in economic production, in which 1700 companies from Eastern Ukraine have so far applied for relocation support from the Ministry of Economy. According to the World Bank, Ukraine's economy will decrease by 45% (World Bank, April 2022). The important export routes via Ukraine's ports in Mariupol and Odesa have been cut off. Before the war, these routes accounted for half of Ukraine's total external trade and 90% of the grain trade. Ukraine is a major exporter of wheat, a mainstay of the economy, but the government has banned the export of grains and other staples as it seeks to ensure food security for displaced people within the country.

In the post-war phase, Ukraine will face the challenge of ensuring economic recovery, improving the well-being of citizens as well as rebooting employment. A successful economic recovery can only be built on sustained growth, high production efficiency and significant job creation, which requires skilled labour. Employment generation and reintegration will take place at a regional level, and will require regional economic strategies and regional skills solutions. The war in Ukraine is impacting on the wider world. Energy prices are soaring across Europe, driving up fuel costs and adding to broader inflationary pressures that began with a supply chain squeeze during the pandemic (EBRD, May 2022). The IMF predicts that this will lead to a slower recovery from the pandemic (IMF, April 2022).

Key social issues

Ukraine's population has been ageing fast: whereas the median age was 35 in 1990, it reached 41 at the start of the war. According to the World Health Organization (WHO), one in four people in Ukraine is over 60, and the impact of the ongoing war on older people, including those with disabilities, has been substantial. The Office of the United Nations High Commissioner for Human Rights (OHCHR), United Nations Population Fund (UNFPA) and HelpAge International have released a joint statement on upholding the rights and safeguarding the health and well-being of older people through improving and sustaining health and social care provisions (WHO, June 2022).

Emigration and rapid population ageing trends were present before the invasion, but the current large-scale displacement could lead to catastrophic human capital loss in Ukraine. In the event of a protracted and widening crisis, 90% of the population could face poverty or vulnerability to poverty, a loss of 18 years of socio-economic achievements in Ukraine, and a return to poverty levels last observed in 2004 (ILO, May 2022).

According to data collected by UNICEF, children are bearing the heaviest burden of the social crisis caused by the war in Ukraine. Children make up 25% of the population, but account for almost 40% of the additional 10.4 million people living in poverty this year (UNICEF, October 2022).

2. EDUCATION AND TRAINING

2.1 Trends and challenges

Education strategy and legal framework for education

The reform process in the field of VET legislation is still ongoing. The Law on Education (2017) sets out the strategic framework for the implementation of reforms and endorses the concept of the New Ukrainian School. It establishes a new structure for the education system, including vocational education and training (VET). The Law gives an important role to the National Qualifications Framework (NQF), lifelong learning and education based on key competences. It introduces the National Qualifications System (NQS), sectoral qualifications frameworks and partial qualifications.

The 'Modern Vocational Education' concept for the period up to 2027, which was adopted in 2019, guides the implementation of the national policy on VET. Its objective is to conduct VET reforms in line with three priorities: decentralising the governance and financing of VET; implementing quality assurance; and developing public-private partnerships in the field of VET (Ukrainian Government websites).

In 2019, Ukraine adopted the strategic document 'The Potential of Competences (Foundations of the State Standard)' as part of the new education standards package. The framework guides the development of the state standard for each cycle of education beyond primary school (basic secondary, upper secondary profiled education, and VET-ISCED levels 2 and 3). Various guidelines are currently under development, including guidelines for educators on the key competences approach in the New Ukrainian School.

The Council for VET Development, a consultative body at national level, was established on 30 March 2021. It supplements the existing Regional VET Councils under the President's office. The proper institutionalisation of this structure is expected to contribute to increased policy relevance for the VET sector and to relevant stakeholders taking ownership. In view of the decentralisation process, it is important to ensure proper coordination between the national and regional levels.

Education expenditure

With public spending on education at 6.0% of GDP and private spending adding another percentage point, Ukraine's spending on education is among the highest in the world. This is partly due to the requirements in the Law on Education to allocate at least 7% of GDP to education and the Law's commitment to quadruple the starting salary of teachers by 2023. However, such an increase would result in a rise in education spending from 6% to 8.8% of GDP by 2023, which would be worrying for Ukraine from a fiscal point of view (ETF, 2020).

Access, participation and early school leaving

Since the invasion, Ukraine's Ministry of Education and Science has been working to maintain and rebuild VET, by resuming VET programmes and by working on projects to update VET institutions with modern machinery and equipment that will contribute to the training of skilled workers to meet the needs of the national economy both in wartime and in the post-war period of rebuilding (OECD, July 2022).

As of 7 October 2022, 2 601 education facilities had been damaged or destroyed (8.27% of the total), while 130 VET schools (17.5% of total) had been bombed or destroyed. In Donetsk, more than 77% of VET schools had been damaged or destroyed, compared to 56% in Luhansk, and more than one third in Kharkiv, Mykolayiv and Chernihiv (ETF, October 2022).

As of 1 September, 85% of VET institutions had resumed teaching, of which 27.8% was held in-class, 21.2% in remote format, and 50.8% in blended format. Overall, 227 056 VET students started classes, (229 248 in 2021), including more than 83 000 newcomers (105 333 in 2021) (ETF, September 2022).

In regions where internet access has been disrupted during the war, students are able to follow lessons on Ukrainian television. Since 1 June 2022, the 'New Ukrainian School Hub', supported by Ukraine, the European EdTech sector and EU funding, brings together supplementary educational resources developed by European EdTech companies, curriculum-based support resources, and Ukrainian e-learning tools and platforms. It is available in English and Ukrainian, with machine translation where possible in other languages. The network of Ukrainian Educational Hubs (<https://eduhub.org.ua/>) includes Educational Hubs in Ukraine (in Vinnytsya, Lviv, Uzhgorod, Ivano-Frankivsk, Ternopil, Zhytomyr, Kyiv, Lutsk, Chernivtsi, Khmelnytsky, Rivne) and abroad (Warsaw, Geneva, Bratislava, Prague, Budapest, Sofia, Leipzig).

During the Education World Forum (the largest annual gathering of education and skills ministers in the world) held in May, the MoES signed a partnership agreement with Google regarding the provision of computer equipment, software, content, as well as digital skills training for Ukrainian teachers and researchers. This is provided with the support of UNESCO and other global development partners. Google for Education, which has been active since 2005 in tackling global education gaps through investments in projects and organisations that expand access to learning, will also continue to update resources such as 'Teach Wherever You Are', a central resource developed during the pandemic that includes information, advice, training, and learning tools (MoES, May 2022).

The educational chatbot EducationUaBot operates in Telegram and Viber and is being developed with support from Switzerland as part of the DECIDE project. Training material is being constantly updated. Electronic content and training modules are being provided with support from EU4Skills, Swiss Contact, ILO and the European Training Foundation and will be placed on the VET platform developed by the ILO. The platform is managed by the MoES VET Directorate for e-learning material. The Ukrainian Education in Emergency website was created for ministries of education, international education managers and teachers to help our children adjust to new schools and curriculums in foreign countries.

PISA results

The Programme for International Student Assessment (PISA) was last conducted in 2018, which Ukraine joined for the first time. Students in Ukraine scored lower than the OECD average in reading, mathematics and science. Compared to the OECD average, a smaller proportion of students in Ukraine performed at the highest levels of proficiency (Level 5 or 6) in at least one subject; at the same time, a smaller proportion of students achieved a minimum level of proficiency (Level 2 or higher) in at least one subject. In Ukraine, girls scored similarly to boys in mathematics, whereas across OECD countries boys outperformed girls by five score points. While girls slightly outperformed boys in science (by two score points) on average across OECD countries, in Ukraine girls and boys performed similarly in science (OECD, 2018).

In 2021, the Ukrainian Centre for Education Quality Assessment conducted a survey among school students of Grade 4 in reading and mathematics. The results published in September 2022 indicate a decrease in the level of both mathematical and reading competences of primary school graduates during the period 2018-2021. Impact of the COVID-19 pandemic is cited as the main cause for this decrease.

The main stage of the PISA-2022 international education quality assessment took place in October. More than 3 500 students from 175 educational institutions have passed testing in three domains: mathematics, reading, and science. The final international report will be issued in December 2023.

Young people not in employment, education or training (NEET)

Although it is difficult to assess the current situation, the share of young people aged 15-24 not in employment education or training has been declining steadily, from 17.6% in 2019 to 14.3% in 2021. The total decrease was mainly due to the falling proportion of young men being NEETs, reaching 10% in 2021. Against this outcome, the share of young women being NEETs has decreased at a much slower pace, reaching 18% in 2021.

2.2 Initial VET and adult learning

Strategic and legal framework for initial VET and adult learning

Access to lifelong learning is implemented on the basis of the Recommendation of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning (2006/962/EC). Ukraine was in the process of strengthening its VET system prior to Russia's invasion through several major reforms to modernise the VET system and decentralise VET governance.

The VET policy document of December 2021, *Concept of the State Targeted Social Programme for Development of VET for 2022-2027*, defines the future Programme bearing the same name. The latter includes the following goals:

- increasing the level of responsibility of the public authorities and local governments, businesses and partner organisations, for the implementation of priority tasks of the Programme; intensifying vertical and horizontal cooperation, exchange of experience between them;
- increasing the skills of specialists at the national and regional levels, as well as the capacity of VET institutions (including those with specific training conditions), civil society institutions, and businesses in organising and providing quality services in the field of VET;
- formation and development of the Supervisory Boards of the VET institutions;
- introduction of an inclusive approach and ensuring equal rights, as well as access to services, opportunities and information for different categories of students, especially for people with disabilities.

In the area of adult learning, the Qualifications System legislation regulates professional qualifications, the validation of non-formal and informal learning, the independent assessment of acquired skills by qualification centres and the development of sectoral qualifications frameworks.

Law No 2312-IX 'On Amendments to the Law of Ukraine on Vocational (Technical) Education' on certain aspects of training skilled workers in martial law and economic recovery came into effect on 1 July 2022. The changes in the VET law support mainly the interests of employers and open additional possibilities to use state or local budgets for preparing employees.

Law No 2179-IX 'On Amendments to some legislative acts of Ukraine regarding the functioning of the national qualifications system (NQS)' came into effect on 17 June 2022. The main changes brought about by this law are:

- updated definitions of key terms
- changes regarding the development of occupational standards: developers shall approve occupational standards independently
- strengthening the role of the NQA
- update of regulations for industry councils for the development of standards, especially regarding the funding of councils

VET governance and financing arrangements

The Ministry of Education and Science (MoES) is undergoing a transition as part of the overall reform process in Ukraine. The situation within the VET system is exacerbated by its intricate structure (e.g. an extensive number of VET institution types and levels, as well as a variety of support institutions, often with overlapping mandates) and a complicated political context. One example of the latter is the inability to adopt the new VET law for more than 3 years (ETF, April 2021). The decentralisation process and the establishment of the National Qualifications Agency (NQA) requires the MoES to coordinate contributions from a wider range of stakeholders.

Social partners are involved in ensuring skills and employability, mainly through contributions to the development of occupational standards, participation in sectoral skills bodies and input to initiatives for the identification of skills needs. The occupational standards development procedures require the presence of employers and trade union representatives. The amendments to the Law on Education, which were adopted in April 2022, define the composition of the sectoral skills bodies (councils) and provide for the participation of social partners in such councils.

The shift of VET funding to the local level has caused a number of problems because the regions are not prepared for the change. Although financial decentralisation has ensured an increase in local resources, local funds cover only about 60% of VET financing needs in the regions, according to the MoES. For the future implementation of the VET Strategy, it is important that solutions to the funding gaps be found. The situation within the VET system is exacerbated by its intricate structure (e.g. an extensive number of VET institution types and levels, as well as a variety of support institutions, often with overlapping mandates) and a complicated political context. One example of the latter is the inability to adopt the new VET law for more than 3 years (ETF, April 2021 and ETF, April 2022).

Qualifications, validation and recognition

Ukraine is still in the phase of moving its national qualifications framework (NQF) towards the operational stage. The NQF is key to implementing a competence-based education and training system in Ukraine, as reflected in the New Ukrainian School and Modern VET concepts. Quality-assured qualifications can potentially benefit many Ukrainians, including training providers and employers in Ukraine and the EU. The National Qualifications Agency (NQA), a body supported by both the government and social partners, was established in 2019. In 2020, the NQF was reduced from 10 to 8 levels to bring it in line with the European Qualifications Framework. In 2021, Ukraine began preparing for self-certification with the Qualifications Framework for the European Area for Higher Education, and Higher education institutions and programmes are in the process of being accredited.

The system for the validation of non-formal and informal learning (VNFIL) is at an early stage. VNFIL is linked with the development of professional qualifications and assessment standards, the accreditation of specific centres that deal with independent assessments of professional qualifications, and the training of assessors. The NQA accredits such centres. The government also approved a regulation that allows educational institutions to recognise the outcomes of non-formal learning in the workplace. Independent assessment based on qualifications standards can become important within a decentralised education system where providers have more autonomy to adapt provisions to local and learners' needs.

Quality and quality assurance

Overcoming the legacy of the past is not easy, moving from a selective education system based on knowledge acquisition to a system focusing on skills development, away from academic subjects to integrated modules focused on the skills of learners. The new changes have not yet been applied across the qualifications system, nor have they fully reached the end users. Reforms will need to include more stakeholders and institutions to take effect. This will require more capacity building, experimentation and guidance, especially as the reforms will lead to more autonomy for providers (ETF, September 2021).

Quality assurance principles are set out in the Law on Higher Education (2014) and the Law on Education (2017). They are safeguarded by the National Agency for Higher Education Quality Assurance (NAQA) and the NQA, both of which have been operational since 2019. Programme accreditation is implemented in higher education and planned in vocational education, by verifying that programmes are in line with state educational standards.

The first stage of teacher certification (independent testing) took place in September 2022, involving 1 855 primary school teachers (1 335 of whom were certified), followed by the second stage for teacher self-appraisal in October, using the EvaluEd information and analytical system.

Work-based learning arrangements

The Regulations on Dual Vocational Education, approved in December 2019, seek to strengthen the labour market orientation of VET and offer to all VET students programmes that incorporate theory and practice. The Action Plan for Dual Education, also adopted in December 2019, provides for the creation of dual training clusters (2020-2023). In 2020, 262 VET providers had implemented elements of dual education for 190 profiles.

A report of the MoES covering the period 2019 to spring 2022 shows that the number of VET institutions organising dual education has increased by 240, while the number students involved in dual education increased by 14 030, and the number of businesses and institutions registered for dual education reached 1 389. Due to the outbreak of the war, work-based learning arrangements have been implemented only to a very limited extent.

Digital education and skills

Digitalisation is an important economic driver in Ukraine. Online work arrangements, including platform work, have been on the rise in recent years both for web-based and on-location work in Ukraine. Various sources consider Ukraine to be among the main exporters of platform labour in Europe and globally (ETF, 2021), and online work continued after the Russian invasion thanks to strong governmental and international efforts to sustain digital access.

Ukraine's Ministry of Digital Transformation (MoDT) was established in 2019. In July 2020, the Chief Digital Transformation Officers (CDTOs) were appointed at the MoES; their key role is to drive the digital transformation in education. In 2021, the Directorate of Digital Transformation in Education (a team to support CDTOs' efforts in digitising education) was established within the MoE.

COVID-19 accelerated the transformation of the education system and has created opportunities to acquire digital skills. However, there are challenges: inadequate internet access, especially in rural areas; lack of online training skills for teachers; limited official methodological guidelines and online textbooks; and low levels of motivation among students to participate in online sessions. Efforts are ongoing to continue to expand the number of schools with internet connectivity and access to digital devices and equipment to allow for greater use of blended learning approaches in schools going forward (World Bank, April 2021).

The main platform for distance learning is the National Online School, which provides lessons in all subjects for both primary and secondary school pupils. The platform 'Vocational Education Online' is part of the All-Ukrainian Online School web platform and is governed by the same regulations: the Regulation on the Unified Web-portal of Digital Education (Government Decision No 184 of 10 March 2021) and the Regulation on filling in the All-Ukrainian Online School platform with educational materials (MoES Order No 1361 of 20 October 2021).

As a response to the challenges of wartime, the draft Strategy for Digital Transformation of Education and Science has been updated and will be submitted to the Cabinet of Ministers of Ukraine. The All-Ukrainian Online School serves as a web platform for distance and blended learning for students and provides methodological support for teachers. PDF versions of textbooks for school students of grades 1-11 can be downloaded free of charge from the e-library of the Institute for Educational Content Modernisation (<https://lib.imzo.gov.ua/>).

Statistics on education and training

Law No 2457-IX on the functioning of integrated education information systems was adopted in July 2022. This law provides for digital interaction at all levels between education authorities, institutions and educational process participants in Ukraine.

Since the beginning of the Russian aggression in Ukraine, the ETF has been monitoring and collating data from a wide range of sources. The aim is to track and review the impact of the invasion on the movement of people, the consequences for workers and the labour market, and the effect on schools and education. The information is compiled into an updated report providing a weekly snapshot of how

the situation is unfolding. It also provides insights on what the future may hold in terms of reconstruction costs, recovery of the business sector and the long-term impact on education.

Additionally, the Labour Market Information System (LMIS) provides easy-to-use tools and methodologies to collect and analyse labour market information for the purpose of both strategic and operational planning of the country's regional VET systems. The LMIS generates labour-market trends to produce a 1-to-3-year forecast of labour market needs by occupation and skill level. With support from the EU4Skills programme, the LMIS methodologies and tools, such as model-based statistical and economic analyses, graduate tracer studies and employers' surveys, have been developed and tested. In parallel, the NQA has received assistance to feed information from the LMIS into the further development of occupational standards.

3. LABOUR MARKET AND EMPLOYMENT

3.1 Trends and challenges

Labour market characteristics

Despite several significant economic reforms introduced in recent years, the Ukrainian labour market was characterised by low productivity, high informality and a substantial gender gap in participation before the Russian invasion (World Bank, 2019). The rates of economic emigration from Ukraine also remained high, with 1.35 million Ukrainian citizens authorised to stay and work in the EU at the end of 2020, representing the third largest group of non-EU citizens (Eurostat, March 2022).

Furthermore, a recent study estimates that 7.5% of Ukraine's productive capacity has been lost since the start of the invasion. This includes, among others: 20% of land unavailable for agricultural production, 40% of the productive capacity in the steel sector, and 43% of the energy sector being occupied or damaged (mainly nuclear & thermal) (Blinov & Djankov, Sep 2022).

Since the invasion, around 10 million people, which is more than one third of the population in Ukraine, have either been internally displaced or have left the country. However, at large number of persons who have lost their jobs are still considered to be officially employed on paper, as many of them were not able to register as unemployed after fleeing the country. Furthermore, nearly a fifth of the 15 million people aged 18 to 60 working in the pre-war labour market was estimated to be working in the informal economy. In some sectors, such as trade, agriculture, and construction, the share of people working unofficially ranged between 40-60%. (Kyiv Independent, August 2022).

At the same time, 65.7% of the Ukrainian labour force is highly educated, while 14.8% of the labour force is low-skilled.

Statistics on and labour market and employment

Employment losses due to the war are currently estimated by ILO at -30%. According to Ukrainian employment surveys carried out in October 2022, 37% of the population employed prior to the war had not yet found a job (41% in April), with women accounting for higher rates than men (45% vs 27%). Among the population employed prior to the war, 36% continued doing the same job, and only 6% managed to change job. Younger people have an advantage in taking up new jobs (10% for the population aged 18-35 years vs 3% for the population aged 51+), while women exhibit a comparative disadvantage compared to men (9% vs 4%), (ETF, 14 October 2022).

The labour market situation was already challenging before the Russian invasion. The COVID-19 pandemic took a heavy toll on employment, with a loss of almost 3 percentage points between 2019 and 2021, when the employment rate stood at 55.7% (15-70 age group), with a gender gap of over 10 percentage points. Among the employed population, 83.7% had the status of employee. The informal employment rate reached 19.5% in 2021, the majority of which being self-employed. The activity rate declined from 63.4% in 2019, to 62.1% in 2020 and 61.8% in 2021 (15-70 age group), with a gap of 12 percentage points between male and female participation in the labour force, while the same indicator was rather even in urban and rural areas.

The unemployment rate increased from 8.8% in 2018 to 9.5% in 2020, reaching 9.9% in 2021. Against the backdrop of COVID-19 pandemic, the number of jobseekers increased from 1.4 million in 2019 to 1.7 million in 2021, with 25% of long-term unemployed. The average duration of job search was 6-7 months in 2020-2021. In 2021, one in five young people aged 15-24 were not in employment, education or training (NEET), most of them belonging to the 'inactive' category, while young women were more exposed overall to the risk of becoming NEET (ETF, 2021).

The sectoral structure of employment has remained fairly stable over recent years, except for the agricultural sector, which experienced an important decline in employment, from 20.2% in 2010 to 13.9% in 2021. While the industrial sector employed 25.5% of the workforce, the majority of employed

persons in 2021 (60.6%) worked in the services sector. Within the services sector, the IT sector was widely acknowledged as booming, with an increasing number of professionals working for national and international clients (Rimsky and Sasic, 2020). In order to stimulate the development of the IT sector, the Ministry of Digital Transformation created the Diia.City, which is a virtual city for IT companies operating in Ukraine. The prevalence of digital employment has been growing over the years, including through international labour platforms. In 2021, around 40 labour platforms were present in the country and Ukraine has become an important hub for remote freelancing recognised world-wide (ETF, 2021).

3.2 Employment policy and institutional settings

Strategy and legal framework in the employment policy field

Since March 2020, the competence for employment and labour policies has been transferred from the Ministry of Social Policy to the Ministry of Economic Development, Trade and Agriculture (MoETA), with oversight over State Employment Service. The Strategy of Human Development and Plan of Actions approved by the Cabinet of Ministers in December 2021 sets out strategic goals, objectives and measures in a broad range of policy areas. A separate chapter defines issues aimed at raising standards of living, increasing employment and providing social support to the population.

Under Article 35 of the Law on Employment, the unemployed benefit from validation of professional qualifications and the recognition of informal and informal learning in accredited qualification centres at the expense of the fund of the compulsory state social insurance of Ukraine.

In September 2022, the Ministry of Economy prepared a draft Law on Employment, which has been published on the government's website and shared with other government authorities as well as social partners for consultation. According to the Explanatory Note of the draft law, one of the objectives is to ensure compliance with EU and ILO standards.

The LMIS generates labour-market trends to produce a 1-to-3-year forecast of labour-market needs by occupation and skill level. LMIS methodologies and tools, such as model-based statistical and economic analyses, graduate tracer studies and employers' surveys, have been introduced in 2021. The Ministry of Economy has developed a draft resolution of the Cabinet of Ministers of Ukraine 'On the implementation of an experimental project on the introduction of the use of the labour market information system in Ukraine to monitor labour market development indicators'. In the context of the war, work on the introduction of the LMIS in Ukraine is nonetheless being resumed. It is planned that cooperation with the ILO and its framework should continue in order to introduce a labour market forecasting system.

The State Employment Service (SES) has over 600 employment centres throughout the country and provides a wide range of activation programmes, job orientation, employment opportunities, (re)training and placements to unemployed persons as well as specialised services for employers. It collects, processes, presents and disseminates administrative data on workforce demand and supply in the labour market. It also analyses supply and demand indicators, submits forecasts to the Ministry of Economic Development, Trade and Agriculture (MoETA) on the development of the labour market, and helps to develop and implement the state's medium-term employment policy and regional employment programmes.

The SES has implemented an educational portal to provide users with updated information on labour market trends, employers' requirements, information on rules and regulations concerning job searching and employment. The platform offers learning opportunities for registered unemployed persons to acquire or develop knowledge and skills, including key competences, as well as information concerning existing (re)training courses and institutions. The SES also provides an online platform for professional guidance and career development aimed at providing career guidance services remotely. The services are provided free of charge to all users interested in choosing a profession or changing job, future professional training, assessment of personal abilities and (soft) skills as well as aptitude for entrepreneurial activity, self-development, etc.

The legislation has been amended during the war to support people in finding employment and ensure payment of unemployment benefits. Despite the war, the SES has continued to assist jobseekers in finding employment. There are major challenges, however: a large mismatch between the high number of unemployed persons and the available vacancies and citizens in the occupied territories cannot register with the SES.

Initiatives to boost employment

The war that the Russian Federation has started in Ukraine on 24 February 2022 led to the adoption of the Ukraine Law 'On Organisation of Labour Relations under Martial Law' (No.2136-IX). This law has affected significant parts of the labour legislation, such as employment agreement validity, the definition of significant working conditions, new regulations concerning work transfers, execution of work by an employee that is not stipulated by the individual employment contract at the request of the employer for the period imposed by martial law, the introduction of remote work from abroad, an increase in the normal duration of working time from 40 to 60 hours per week, and other significant changes to labour legislation for the period of war in Ukraine.

Under martial law, almost all the current legislation was updated to meet the new realities in the field of employment. A key task has been to preserve jobs, to ensure access to State employment services for all citizens, even in the territories of hostilities and occupation, to ensure the payment of unemployment benefits throughout the territory of Ukraine, and most importantly, to effectively search for work for the unemployed, especially IDPs (Non-paper, October 2022)

Initiatives to increase the capacity of the public employment services

Under the new distribution of ministerial responsibilities that came into force in March 2020, the Ministry of Economic Development, Trade and Agriculture (MoEDTA) has assumed greater responsibility by taking over the State Employment Service (SES) and taking charge of lifelong learning as a core element of a modernised VET system. The reforms seek to achieve more client-oriented approaches, a diversification of services related to active labour-market programmes and support for self-employment, and a stronger role for the SES in the provision of labour-market information, including the capacity for labour-market forecasting. New services for jobseekers have been introduced, such as career advisors, and services for employers have been improved, including employers' consultants, e-services and more.

Since November 2021, and as part of an experimental project, employment centres are implementing a new model of providing client-oriented services to ensure unified approaches to the arrangement of work on providing services of the SES. This includes services for operative employment, the promotion of return to legal employment and the integration into the labour market of registered unemployed persons and jobseekers.

For further information please contact Susanne M. Nielsen, European Training Foundation, email: Susanne-M.Nielsen@etf.europa.eu.

STATISTICAL ANNEX – UKRAINE

The Annex includes annual data from 2015, 2019, 2020 and 2021 or the last available year.

	Indicator	2015	2019	2020	2021	
1	Total Population (.000) ⁽¹⁾	45 154.0	44 386.2	44 132.0	43 814.6	
2	Relative size of youth population (age group 15-24 and denominator age 15-64, %) ^{(1) C}	15.8	14.1	14.1	14.1	
3	GDP growth rate (%)	-9.8	3.2	-3.8	3.4	
4	Gross value added by sector (%)	Agriculture	12.1	9.0	9.3	10.6
		Industry	21.7	22.6	20.8	23.5
		Services	51.2	54.5	55.8	51.8
5	Public expenditure on education (as % of GDP)	5.7	5.4	M.D.	M.D.	
6	Public expenditure on education (as % of total public expenditure)	13.3	13.2	13.1	M.D.	
7	Adult Literacy (%) ^C	M.D.	M.D.	M.D.	M.D.	
8	Educational attainment of total population (aged 15+) (%) ⁽⁸⁾	Low ⁽²⁾	M.D.	10.2	10.0	9.6
		Medium ⁽³⁾	M.D.	45.2	45.6	45.5
		High ⁽⁴⁾	M.D.	44.6	44.4	44.9
9	Early leavers from education and training (aged 18-24) (%)	Total	M.D.	M.D.	M.D.	M.D.
		Male	M.D.	M.D.	M.D.	M.D.
		Female	M.D.	M.D.	M.D.	M.D.
10	NET enrolment rates in secondary education (ISCED level 2-3) (%)	M.D.	M.D.	M.D.	M.D.	
11	Share of VET students in upper-secondary education (ISCED level 3) (%)	29.4	28.6	27.0	M.D.	
12	Low achievement in reading, mathematics and science – PISA (%)	Reading	N.A.	25.9 ⁽⁷⁾	N.A.	N.A.
		Mathematics	N.A.	35.9 ⁽⁷⁾	N.A.	N.A.
		Science	N.A.	26.4 ⁽⁷⁾	N.A.	N.A.
13	Activity rate (aged 15-70) (%) ^{(9) (10)}	Total	62.4	63.4	62.1	61.8
		Male	69.2	69.9	68.5	68.1
		Female	56.2	57.5	56.3	56.1
14	Inactivity rate (aged 15-70) (%) ^{(9) (10)}	Total	37.6	36.6	37.9	38.2
		Male	30.8	30.1	31.5	31.9

	Indicator		2015	2019	2020	2021
		Female	43.8	42.5	43.7	43.9
15	Employment rate (aged 15-70) (%) ^{(9) (10)}	Total	56.7	58.2	56.2	55.7
		Male	62.2	64.0	61.8	61.5
		Female	51.7	52.9	51.2	50.4
16	Employment rate by educational attainment (aged 15-70) (%) ^{(9) (10)}	Low ⁽²⁾	16.7	17.8	15.6	14.8
		Medium ⁽³⁾	52.5	54.4	52.3	51.6
		High ⁽⁴⁾	67.5	67.7	66.2	65.7
17	Employment by sector (%) ^{(9) (10)}	Agriculture	15.3	13.7	14.0	13.9
		Industry	24.7	25.1	24.8	25.5
		Services	60.0	61.2	61.2	60.6
18	Incidence of self-employment (aged 15-70) (%) ^{(9) (10)}	15.9	16.3	16.4	16.3	
19	Incidence of vulnerable employment (aged 15-70) (%) ^{(9) (10)}	14.7	15.0	15.0	14.9	
20	Unemployment rate (aged 15-70) (%) ^{(9) (10)}	Total	9.1	8.2	9.5	9.9
		Male	10.1	8.5	9.9	9.6
		Female	8.1	7.9	9.1	10.2
21	Unemployment rate by educational attainment (aged 15-70) (%) ^{(9) (10)}	Low ⁽²⁾	12.1	13.9	15.9	15.0
		Medium ⁽³⁾	10.0	9.3	11.0	10.7
		High ⁽⁴⁾	8.2	7.1	8.0	9.1
		VET ⁽⁵⁾	10.4	9.2	10.8	10.2
22	Unemployment rate (aged 15-24) (%) ^{(9) (10)}	Total	22.4	15.4	19.3	19.1
		Male	22.7	15.5	19.9	18.0
		Female	21.9	15.3	18.5	20.3
23	Proportion of people aged 15-24 not in employment, education or training (NEETs) (%) ^{(9) (10) (11)}	Total	17.2	15.6	15.5	14.3
		Male	14.6	11.5	12.7	10.8
		Female	19.8	19.9	18.4	18.0
24	Participation in training/lifelong learning (% aged 25-64) ⁽⁹⁾	Total	0.8	0.7	0.5	0.5
		Male	0.7	0.7	0.5	0.5
		Female	0.9	0.7	0.4	0.4

	Indicator		2015	2019	2020	2021
25	Human Development Index	0.8	0.8	M.D.	M.D.	

Last update: [05/09/2022](#)

Sources:

Indicators 1, 2, 3, 4, 5, 6, 7: World Bank, World Development Indicators database

Indicators 7, 11: UNESCO, Institute for Statistics

Indicators 8, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24: Ukrstat (data received)

Indicator 12: OECD PISA 2018 Results (Volume I) Annex B1

Indicator 25: UNDP

Notes:

⁽¹⁾ Estimation.

⁽²⁾ Low - General basic, primary and low

⁽³⁾ Medium - General secondary, professional-technical

⁽⁴⁾ High - incomplete tertiary, (basic and full) tertiary

⁽⁵⁾ VET - professional-technical

⁽⁶⁾ applies to 2012

⁽⁷⁾ applies to 2018

⁽⁸⁾ 2019-2021: Data without the population of the Autonomous Republic of Crimea and Sevastopol and part of the conflict zone

⁽⁹⁾ 2015-2021: Data without the population of the Autonomous Republic of Crimea and Sevastopol and part of the conflict zone

⁽¹⁰⁾ 2014: Data without the population of the Autonomous Republic of Crimea and Sevastopol

⁽¹¹⁾ Participation in education in the week prior to the survey is considered

Legend:

C = ETF calculations

N.A. = Not Applicable

M.D. = Missing Data

KEY DONOR PROJECTS IN EDUCATION, TRAINING AND EMPLOYMENT

Ukraine's draft Recovery and Development Plan was presented at the Ukraine Recovery Conference (URC) in Lugano in July 2022. As the co-chairs of the Sector Working Group on Education and Science, UNICEF and the Embassy of Finland are currently collecting the feedback from the education donor community and are preparing a consolidated response to the draft plan.

The key donor support is provided through the 'EU4Skills: Better Skills for a Modern Ukraine' programme, with EUR 58 million funded by the EU, Finland, Germany and Poland. The funds are spent on modernising VET infrastructure, developing professional and educational standards, introducing new training programmes, retraining teachers and management staff, developing a multi-channel financing mechanism for vocational training, and providing access to VET institutions for people with disabilities. Following the outbreak of the war, the MoES announced new needs for the short and medium term:

- temporary hosting of internally displaced persons (IDPs)
- continuation of learning
- provision of skills for rebuilding Ukraine's economy and infrastructure.

On this basis, EU4Skills has re-purposed its objectives in order to meet these needs.

On 17 December 2020, the Co-Chairs of the National Tripartite Socio-Economic Council and the Regional Director of the ILO Regional Office for Europe and Central Asia signed a Memorandum of Understanding on the Implementation of the Decent Work Country Programme for Ukraine. Improved social dialogue, inclusive and productive employment, improved working conditions and social protection were identified as priority areas of the Programme.

In December 2021, a financial agreement was signed enabling a loan of EUR 58 million from the European Investment Bank for the development of Centres of Professional Excellence. A grant of EUR 8.5 million for the development of vocational education from the Neighbourhood Investment Platform of the European Union was ratified by the Ukrainian Parliament in July 2022.

In August 2022, a EUR 20 million Grant and Project Agreement was signed between the Cabinet of Ministers of Ukraine represented by the Ministry of Education and Science of Ukraine, the Ukrainian Social Investment Fund ('UFSI') and KfW, Frankfurt am Main ('KfW'), providing for the implementation of the 'Vocational Education and Training in the Eastern Partnership' programme to establish Centres of Professional Excellence.

Other key active donors in the employment field include the EU, GIZ, Swiss Development Cooperation and DANIDA.

ABBREVIATIONS

EBRD	European Bank for Reconstruction and Development
EC	European Commission
ETF	European Training Foundation
EIB	European Investment Bank
EU	European Union
GDP	Gross domestic product
ILO	International Labour Organization
IMF	International Monetary Fund
IOM	International Organisation for Migration
ISCED	International Standard Classification of Education
ISIC	International Standard Industrial Classification
MoES	Ministry of Education and Science
MoEDTA	Ministry of Economic Development, Trade and Agriculture
NEET	Not in education, employment or training
NQA	National Qualifications Agency
NQF	National Qualifications Framework
NQS	National Qualifications System
PISA	Programme for International Student Assessment
SES	State Employment Service
UNHCR	United Nations Refugee Agency
USD	US dollar
VET	Vocational education and training

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