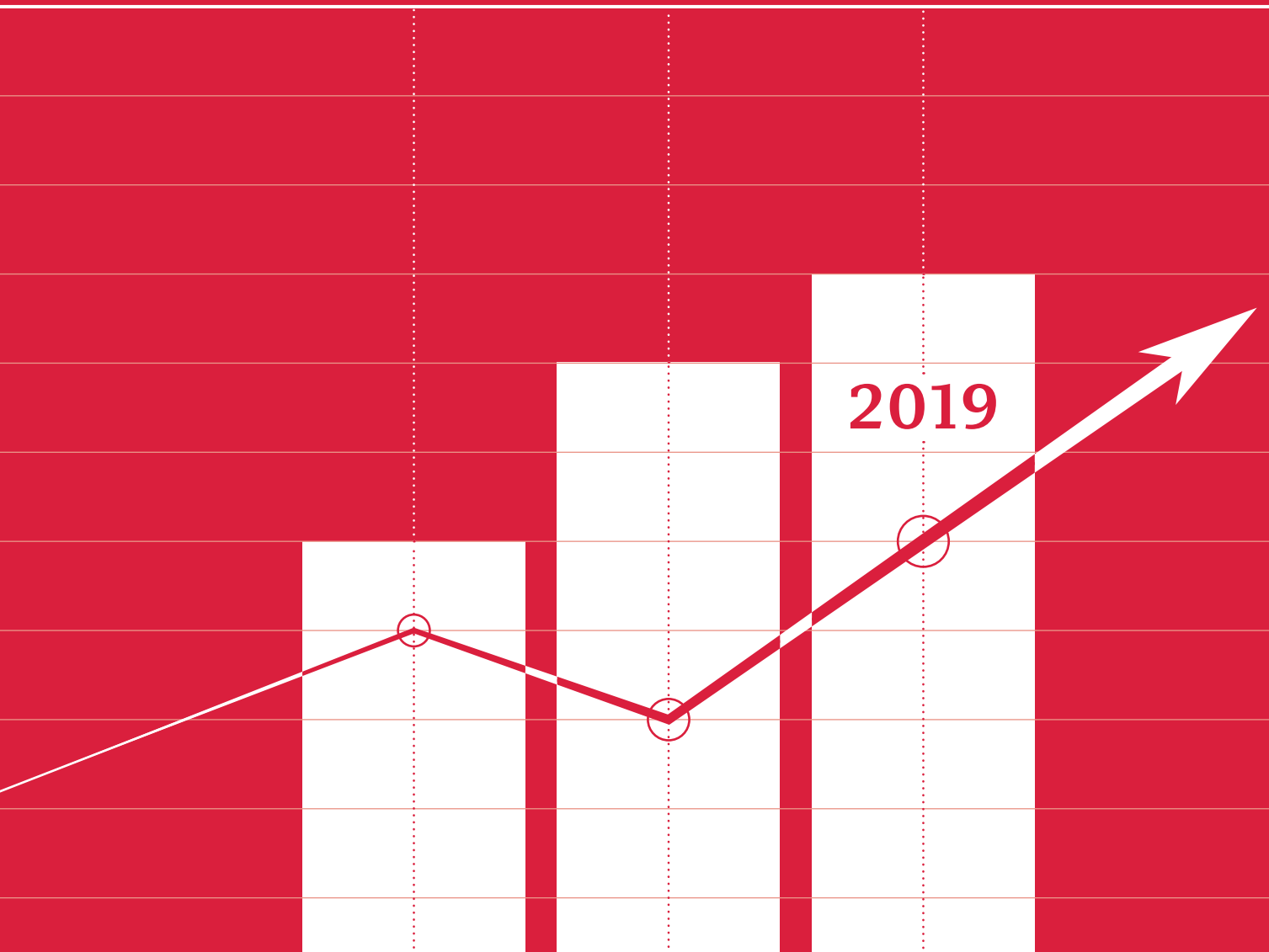


**ACC**

AMERICAN CHAMBER  
OF COMMERCE  
UKRAINE

# UKRAINE COUNTRY PROFILE





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**ANDY HUNDER**

President of the  
American Chamber of Commerce  
in Ukraine

**DEAR CHAMBER MEMBERS AND FRIENDS,**

Throughout the past year, I traveled across Ukraine visiting companies from north to south, east to west. Wherever I journeyed, in Kryvyi Rih, Nikopol, Sumy, Ternopil, Odesa, Lviv, Dnipro, Kamianske, Chornobyl or Vinnytsia, I witnessed story after story of growth and plans for further development.

I'm not surprised that 74 percent of American Chamber of Commerce members saw their business increase in Ukraine in 2018; three quarters are forecasting continued growth in 2019, according to our latest survey.

This expansion is a result of Ukraine's economy showing continuous, albeit modest, growth over the past three years. After the illegal annexation of Crimea and Russia's subsequent invasion, Ukraine went through a nasty fiscal plunge in 2014 and 2015. It is now rebounding.

The key sectors showing growth are agriculture, IT, health-care, food and beverage, infrastructure, fast-moving consumer goods, renewable and nuclear energy sectors.

Over the next two years I will continue to serve on the Executive Committee of AmChams Europe, the umbrella organization for American Chambers of Commerce in 42 countries throughout Europe, where I have been re-elected as Treasurer. Getting Ukraine back on the radar screen on investors is of key importance.

Not everything is perfect in Ukraine, especially as the war in the east continues for a fifth year and the threat of further Russian aggression looms. But the companies that continue to operate and take advantage of Ukraine's resilient economy and economic reforms have remarkable stories to share.

Our member companies are feeling bullish about the year ahead, and so are we.

**LENKA KOSZARNY**

Chair of the Chamber 2019  
Board of Directors  
Founding Partner  
and Chief Executive Officer,  
Horizon Capital

**DEAR CHAMBER MEMBERS AND PARTNERS,**

Serving on the AmCham Ukraine Board of Directors these past three years, alongside such esteemed Members of our community, has been very rewarding. I am humbled and delighted to be elected as Chair and look forward to working together with our Board and President to amplify both the successes of our Members, as well as issues they face, during this crucial year ahead.

I am also honored to welcome you from the pages of a new edition of the exclusive annual Chamber publication “Ukraine Country Profile 2019”. This year’s edition consists of 16 industry-specific reports of Ukraine’s economy with deep analysis and statistics, provided by AmCham Members. We hope you find this useful and look forward to your feedback.

During 2018, the Chamber and its Board of Directors focused on supporting our Members through challenges faced. We promoted an effective dialogue, based on trust and credibility, between the business community and our partners in the Government resulting in tangible policy wins. Much has been accomplished with regards to cooperation with the IMF and Ukraine’s bilateral partners, as well as implementing meaningful reforms. At the same time, much remains to be done and the Chamber will continue to make an important contribution to Ukraine’s development, including advocating for measures that improve the country’s investment climate as this is a key priority for the American Chamber of Commerce in Ukraine.

On that note, on behalf of the 2019 Board of Directors, I would like to express gratitude to each and every Member Company for your strong support and extensive involvement in the work of our Committees and in participating in Chamber events, programs and surveys. Your efforts and contributions, alongside that of our Board, President and talented Chamber team, truly drive AmCham’s results. We look forward to working closely together and supporting each other to reach even greater heights in our businesses and our community in 2019.



**MARIE YOVANOVITCH**

U.S. Ambassador to Ukraine

**DEAR CHAMBER MEMBERS,**

The American Chamber of Commerce has been an invaluable champion of the business community in Ukraine for many years. The Chamber's leadership, expertise, and determination have helped push through the many consequential reforms that have reinvigorated Ukraine's economy since the Revolution of Dignity. I thank the Chamber for being such a clear and persuasive voice for reforms that improve the business climate and the economy, and I congratulate the Chamber and all of its members on their achievements of the past year.

The Chamber's work is critical to helping Ukraine reach its long-term economic potential. Ukraine is a country rich in natural resources with a dynamic workforce, low labor costs, and access to European markets. Rising wages and disposable income are creating a new generation of consumers, which naturally benefits businesses. Ukraine's drive toward democratic, Western values and standards is creating the framework for the vibrant economy Ukraine needs to thrive.

Meanwhile, everyday Ukrainians are seeing the benefits of these changes and reforms ranging from decentralized government to a stronger healthcare system. New laws designed to reduce law enforcement pressure on businesses, a healthier banking sector, and automated VAT refunds are making Ukraine an easier place to do business. Ukraine once again improved its Doing Business Rating by five places to 71<sup>st</sup> out of 180 in 2018. Deregulation and the adoption of transparent systems of asset declarations and procurement have reduced the scope for corruption. We expect the long-awaited High Anti-Corruption Court, when properly established and functioning, to strongly reinforce rule of law in Ukraine and complement the work of the National Anti-Corruption Bureau of Ukraine and the Special Anti-Corruption Prosecutor's Office to combat corruption.

The U.S. trade mission to Ukraine in late October 2018 showed the growing interest of U.S. companies in Ukraine. The mission provided U.S. companies the chance to explore business opportunities in the areas of agricultural, energy, and infrastructure. The message was clear: now is the time to invest in Ukraine. While this may be old news for Chamber members, it was very encouraging to see other companies ready to jump on the bandwagon.

While much progress has been achieved, more work is ahead. Energy sector liberalization, privatization of state-owned companies, land reform, and improved tax and customs administration are a few areas where Ukraine must move forward. Above all, Ukraine's success hinges on its ability to root out corruption and create a transparent marketplace where entrepreneurship and good ideas can flourish. I have no doubt that the Chamber and its members will continue to be drivers of progress in these areas, which will keep Ukraine on its path to Euro-Atlantic integration.

I welcome the opportunity to continue the U.S. Embassy's close partnership with the American Chamber of Commerce, as we work together to support a strong, prosperous, and independent Ukraine. Thank you for all that you do.





**VOLODYMYR GROYSMAN**

Prime Minister

**DEAR CHAMBER MEMBERS,**

On my own behalf and on behalf of the Government of Ukraine, I express my gratitude to the American Chamber of Commerce in Ukraine for the high dynamics of the dialogue and cooperation that undoubtedly has a positive impact on the improvement of the business climate in our country.

The year 2018 has become a milestone for the Ukrainian economy that demonstrates a positive trend of macroeconomic stabilization. Despite the difficult situation in the Donbass and new security challenges (blockade of the Azov Sea and Ukrainian ports by the Russian Federation), Ukraine is gradually implementing long-term reforms, modernizing infrastructure, and strengthening national defense capabilities. Capital investments, export of goods and services, passenger and transit capacities, production in the processing and extractive industries, and supply of electricity and gas are increasing.

We are firmly determined to resolve the problem of internal and external debt. Our goal is to reduce external and internal debt in midterm to 58% of GDP in 2019. International investors characterize the return of Ukraine to international capital markets in positive terms and consider Ukraine as an attractive investment country. With the accession of Ukraine to the OECD Declaration on International Investment and Multinational Enterprises and becoming a Member of OECD Investment Committee, progressive standards of conducting business are being introduced.

The past years have become a breakthrough for Ukrainian-American economic cooperation. The trade turnover has significantly increased between Ukraine and the United States of America. The Overseas Private Investment Corporation (OPIC) has increased cooperation with our country. The OPIC portfolio for this period includes 8 projects costing a total of 828.8 million USD with the wind power project in the Zaporizhia Region being among the largest (447.5 million USD). Large-scale projects with such US economic and energy giants as General Electric Transportation, Westinghouse Electric, and Holtec International have demonstrated high level of prospects offered by our country. Significant opportunities exist in the Ukrainian agrarian sector, IT sector, and in the development of alternative energy. The growth of the Ukraine's gross domestic product by 3.6 percent represents a clear indicator of the success of the reform. All these achievements contribute to the vision of Ukraine as an attractive investment destination. I am confident that the long-term friendly and partnership-directed position of the Chamber will only contribute to the full implementation of the business environment in Ukraine.

**ANDRIY PARUBIY**

Chairperson  
of the Verkhovna Rada

**DEAR FRIENDS,**

A total of 26 years in a row, the American Chamber of Commerce in Ukraine has been successfully implementing important strategic decisions thereby contributing to creation of attractive business environment and development of investment climate as well as advocating for the interests of investors and entrepreneurs.

I believe that industry, entrepreneurship, and innovation are the drivers of economic growth and a guarantee of a flourishing and developing Ukraine.

Legislative initiatives relating to the issues of industrial and economic growth are the priority for the Ukrainian Government. Attracting investments, creating new jobs, developing production, and increasing non-resource exports are the top priorities for the economic policy.

I am convinced that the implementation of these strategic priorities will contribute to the improvement of the Ukraine's position in international ratings and provide real positive signals to international and domestic investors. It will encourage the flow of investment, promote sustainable economic development, and, eventually, improve the welfare of Ukrainians. The role of the American Chamber of Commerce in Ukraine during these changes is very important.

Dear friends and colleagues, thank you for fruitful cooperation and a significant contribution to the constant development of a democratic, successful, and innovative Ukraine!



**VALERIY CHALY**

Ambassador of Ukraine to the USA

## **DEAR MEMBERS OF THE AMERICAN CHAMBER OF COMMERCE IN UKRAINE,**

It has become a good tradition for me to welcome a new release of the AmCham's comprehensive analysis of the Ukrainian economy – Ukraine Country Profile 2019 – that provides a useful insight for foreign investors and outlines promising sectors for development of mutually fruitful cooperation.

As an Ambassador of Ukraine to the USA, I am happy to underline that we have seen a real boost in our economic and investment bilateral cooperation with the United States. During the past year, our trade turnover increased 1.6-fold and we have very promising expectations for further growth in 2018 and 2019.

Our fruitful consultations within the framework of the U.S.-Ukraine Trade and Investment Council held in Washington, DC on October 23 as well as within the framework of the newly established Economy and Energy Working Group that took place on November 16 as a part of the U.S.-Ukraine Strategic Partnership Commission will bring additional impulse for further strengthening and intensification of our bilateral economic cooperation with the United States.

We regard our economic cooperation with the US as one of real evidence of our enhanced strategic partnership. As it has been highlighted by State Secretary Mike Pompeo, economic and energy security cooperation is one of the three pillars of the relationship between Ukraine and the United States. With the support of our American partners, we are substituting import from the Russian Federation and have a promising trend for further more intimate cooperation with the United States in the number of sectors.

All of these brilliant outcomes have become real as a result of practical implementation of the agreements reached by President Petro Poroshenko and President Donald Trump.

As of now, we have established a fruitful large scale cooperation with a number of leading American companies: General Electric is involved in a game-changing modernization of the Ukraine's infrastructure; Xcoal is supplying our power plants with energy resources; together with Westinghouse, we are minimizing our dependence on Russian nuclear fuels; Holtec is constructing extremely important facilities for safe storage of used nuclear materials; American agro companies such as Bunge, Cargill, Monsanto, and DowDuPont are helping us to develop Ukraine's outstanding potential to feed the world; and together with Northrop Grumman, we are launching space rockets. And these are just some examples of our practical cooperation with the US in the economic sphere. Nowadays, we are working with our American partners to launch new breakthrough projects that will have a significant impact on modernization of the Ukraine's economy.

We see success stories of foreign investors in Ukraine as an extremely important indicator of transformations in the country. Every new investor is of great value to us and we are committed to continue our work to improve business environment in Ukraine. We highly appreciate your trust in our country, your confidence in the future successes of investments, and your vision of Ukraine as a promising and rising market.



### **HUGUES MINGARELLI**

EU Ambassador to Ukraine,  
Head of the EU Delegation  
to Ukraine

### **DEAR CHAMBER MEMBERS,**

I am glad to address you again in this yearly publication.

It is widely acknowledged that Ukraine has enormous potential: competitive and skilled workforce, industrial history, fertile land, and geographic location.

In spite of this, foreign direct investment has remained very low since 2015, and it was the lowest in the region, at USD 1,153 per capita, at the end 2017.

The causes of such deplorable situation have been reflected in a recent survey conducted by the European Business Association and the Center for Economic Strategy where widespread corruption is cited for the third consecutive year as the main deterrent to foreign investment in Ukraine followed by a lack of trust in the judiciary, instability in the financial system, and concerns around exchange rate fluctuations.

The top priorities to improve the business climate in Ukraine should therefore include fighting corruption and strengthening the rule of law.

Some progress has been made in 2018 in e-procurement, economic stabilization, and creation of new anti-corruption bodies. The Ukraine's ranking in the World Bank's ease of doing business index has also improved.

Meanwhile, additional measures need to be adopted, and for this purpose, the Association Agreement with the EU is helping Ukraine to implement critical reforms to promote the rule of law, transparency, good governance, and establish a more equitable system for both business and the state. Continued cooperation with the International Monetary Fund is also important, as is the need to expedite the privatization of the state-owned enterprises.

The EU is working shoulder to shoulder with Ukraine in almost all aspects of its reform process. We have substantial assistance programs supporting the implementation of the Association Agreement and beyond to stand by the Government in its efforts to build a free and democratic society and a viable market economy while improving the quality of life for all Ukrainians.

In 2019, we will continue to count on the excellent work of one of our key partners, the American Chamber of Commerce, to help keep Ukraine on the path to prosperity.



## **VITALI KLITSCHKO**

Head of Kyiv City  
State Administration,  
Kyiv City Mayor

### **DEAR CHAMBER MEMBERS,**

The city authorities fully support and promote economic processes aimed at increasing the well-being of the population and creating comfortable up-to-date living and investing conditions.

I am pleased to present the results of the socio-economic development and investment activities of the city of Kyiv to Chamber Member Companies, representatives of international business, and other interested parties.

The capital of Ukraine has always been the leader and accelerator of progressive socio-economic transformations in our country, which has been confirmed by an increase in the city's credit rating by the leading rating agencies: Moody's Agency has raised Kyiv's credit rating from Ca (stable assessment) to Caa3 (positive assessment); S&P Global Ratings and Fitch Ratings agencies have rated the city as B- (stable assessment).

In 2017, Kyiv consolidated its status as an economic development leader among Ukrainian cities, demonstrating the growth of the gross regional product (GRP) to UAH 702.7 billion (+3%), which was 23.6% of the state's GDP. 24% of the volume of exports of goods and services of Ukraine is the share of Kyiv city. In 2017, budget income increased by 26% (up to UAH 48.4 billion), enabling us to increase spending on education, health, transport and road infrastructure, social protection, housing and communal services.

Kyiv is a direct leader in attracting investment. The volume of direct foreign investments in the capital economy is 59% of the volume of direct foreign investments in the Ukrainian economy; the volume of capital investments is 30.3% of total capital investment in Ukraine. This testifies not only to the maturity of the Kyiv city economy but also to the fact that international investors regard the city as a reliable partner in the investment project implementation. One of the main prerequisites for attracting investment in the city of Kyiv is the openness and transparency of the city authorities' activities, aimed at the ultimate simplification of business conditions, ensuring reliability and stability in cooperation with partners, and introducing the latest technologies into the city management system.

The city's achievements in the investment sector at the international level are the 71<sup>st</sup> place in the Doing Business ranking; the 3<sup>rd</sup> place in the Most Profitable European Cities of the Future category according to the results of the European Cities and Regions of the Future 2018/2019 competition by the Foreign Direct Investment Magazine publication, and a place in the top 10 best European cities of the future on a strategy to attract direct foreign investment.

I also want to note that the traditional holding of the annual Kyiv Investment Forum in the fall increases the Ukrainian capital's positive image among the international community, as well as presents specific investment projects to foreign investors.

I'd like to express my profound respect and gratitude to the American Chamber of Commerce in Ukraine for its constructive cooperation and significant contribution to the development of our city.



### **STEPAN KUBIV**

First Vice Prime Minister —  
Minister of Economic Development  
and Trade

### **DEAR MEMBERS OF THE AMERICAN CHAMBER OF COMMERCE IN UKRAINE,**

Thank you for your growing interest in business development in Ukraine.

The success of American companies in our market is extremely important for us. Positive examples of your activity in Ukraine will serve as a clear signal of the existing development potential for Chamber Members and a guide for international investors.

Of course, there will be no investments without creating a suitable basis for their involvement. Therefore, the Government of Ukraine continues to improve the investment climate and create favorable conditions for doing business in the country. To this end, we maintain a continuous dialogue with business representatives.

Reforms introduced by the Government of Ukraine, such as judicial, anti-corruption, tax, decentralization, deregulation, and business simplification reforms, as well as energy and privatization reforms, have the greatest impact on investment growth and business development.

In recent years, Ukraine has substantially strengthened its position in the Ease of Doing Business ranking, being the 71<sup>st</sup>. We are determined to continue strengthening the position of Ukraine in this ranking.

With the accession of Ukraine to the OECD Declaration on International Investment and Multinational Enterprises and gaining membership in the OECD Investment Committee, progressive standards of doing business are being introduced, which will undoubtedly enhance the investment attractiveness of our state.

In other words, the Government of Ukraine is creating all the prerequisites for an economic breakthrough. I am sure that it is private capital that will play a decisive role in the possibility of such a breakthrough.

Therefore, I invite American investors to cooperate and sincerely wish all the Members of the American Chamber of Commerce in Ukraine and Ukraine Country Profile 2019 publication to be successful in Ukraine.



**IVANNA KLYMPUSH-TSINTSADZE**

Vice Prime Minister for European  
and Euro-Atlantic Integration

**DEAR FRIENDS,**

Despite the war, our country continues to develop and change. This year, Government has continued its reforms efforts that have already yielded tangible results, such as GDP growth and the rise of Ukraine's positions in different rankings illustrating improved business environment, higher degree of ease of doing business, and the investment attractiveness.

Ukraine is becoming more open to the world due to consistent implementation of the Association Agreement between Ukraine and the EU and introduction of pro-European rules and procedures. Dozens of new modern enterprises have opened here this year, our exports are growing rapidly, and the EU share in total exports from Ukraine has already exceeded 42%. That is a clear indication that the Ukrainian products and services are successfully competing in large markets being comparable to foreign ones.

I truly believe that there is no country in the world these days that has more possibilities to offer for business than Ukraine. Today, Ukraine is becoming a more powerful player in the food industry, our IT industry has become a real engine of the economic growth, and renewable energy is being actively developed. These factors are the reasons to invest in these and many others promising industries of Ukraine.

I would like to invite all of you to work in Ukraine!



## **VOLODYMYR KISTION**

Vice Prime Minister

### **DEAR CHAMBER MEMBERS,**

It is my honor and pleasure to address you on the pages of the special edition of “Ukraine Country Profile” and to express my gratitude for your long-standing persistent work that contributes to positive changes of the business environment and investment climate in Ukraine.

Ukraine is changing from year to year. Government’s reforms initiated a few years ago have allowed the Ukrainian economy to escape stagnation and to gain a foothold on the path to sustainable development. The Ukraine’s economy is growing for the 11<sup>th</sup> quarter in a row.

In the ratings of global competitiveness, we have surged six steps straight away, and according to the Open Data Barometer, we have occupied the second place open-data wise among the countries with the highest rate of progress in making reforms over the past 4 years.

We are actively participating in the infrastructure development. This year, we have allocated UAH 90 billion to infrastructure modernization projects that comprise reconstruction and building new roads, railways, airports as well as Ukrainian sea and river ports. In this segment of economy, we have introduced electronic document processing, technical standards, and regulations of the EU, “Single Window” principle, and many more.

The reform of the Ukraine’s largest rail carrier Ukrzaliznytsia is underway. The Government’s task is to make Ukrzaliznytsia more competitive so that the quality of its services could be appreciated by both the general public and the business.

The Government has also eliminated a number of administrative barriers, has reduced the frequency and duration of inspections, has expanded rights of businesses, and has introduced an electronic system for VAT refunds that contributes greatly to facilitating doing business in Ukraine.

The Government is maintaining steady course of the reforms in the energy sector. We aim to achieve demonopolization and liberalization of the gas market striving to make the country energy independent and self-sufficient. Together with the members of the Parliament, we have reduced the tax pressure on the gas producers — we have established some of the best incentive rental rates in Europe and have imposed a five-year moratorium on tax regime changes for upstream companies.

We are working on the reform of the electricity market, the most ambitious and most complicated one since Ukraine’s independence. We are confident that once the energy market is liberalized, everything will change — relationships in the market, the level of responsibility of supplying and distributing companies, and, last but not least, the quality of services.

The success of any reform depends on the dialogue between the authorities and the business. The Government of Ukraine is open to constructive cooperation, ready to listen to your proposals, which, I believe, will contribute to improvement of Government to Business relations in our country and to prosperity of all of us.





**PAVLO ROZENKO**

Vice Prime Minister

**DEAR CHAMBER MEMBERS,**

I am really glad to greet you and to express my respect to the American Chamber of Commerce in Ukraine for the implementation of the principles aimed at defending free enterprises, for aiding the effective economic reforms, and for the development of the business environment in Ukraine based on justice and transparency.

In the process of execution of the “Ukraine – 2020” Presidential Strategy of sustainable growth, the Government of Ukraine implements reforms aimed at increasing the level of economic growth and improving social standards. In 2016–2018, we managed to guarantee the sustainable growth of our economy. In 2019, we expect the GDP go keep growing.

Over the recent years, the Government has maintained the array of regulatory acts to improve conditions of doing business and its regulation in order to lift restrictions for enterprises and entrepreneurs in many sectors so that they could develop more rapidly thereby positively influencing the national economy and the well-being of the Ukrainian people.

The task of authorities at all levels and the task of all us today is to remove all blocks and restrictions and to make every investment in Ukraine effective.

As a result, according to the Global Competitiveness Report of the World Economic Forum, in 2017, Ukraine improved its “Policy transparency” ranking by 34 positions. Lately, our country has introduced 35 e-services for citizens and business in the fields of economy, healthcare, education, and social security.

Ukraine has also improved its ranking and currently occupies the 31<sup>st</sup> position in the Global Open Data Index, which is attributed to the effective operation of the data.gov.ua unified open source data portal that provides access to over 25 thousand database sets. The draft budget 2019 takes into account the fulfillment of fiscal policy tasks aimed at reaching strategic goals of the state and provides for funding necessary to implement priority measures of the Government.

The growth of the minimum official wage represents a prerequisite to unshadowing of employment and increasing of revenue received by the State budget of Ukraine from unified social tax and other taxes.

The pension reform 2017 defined actions aimed at stabilization and development of the system of pensions and demonstrated full-on implementation of the II (second) level of superannuation system – compulsive financial defined contributions system. That is our strategic goal.

For me, as Vice Prime Minister, the person who supervises the spheres of social policy, healthcare, and culture in the government, it is a great pleasure that these fields keep developing in our country in line with modern world tendencies despite the current difficult situation.

By combining efforts, we must keep implementing reforms to guarantee economic growth under the conditions of global challenges. Only partnership and cooperation that we experience will let us reach all the necessary changes and fulfill the economic potential of Ukraine.



### **HENNADII ZUBKO**

Vice Prime Minister,  
Minister of Regional Development,  
Building and Housing  
and Communal Services

### **DEAR FRIENDS,**

I express my gratitude to the American Chamber of Commerce in Ukraine for its systematic support of Ukraine in building here a favorable investment climate and business environment. Ukraine is introducing profound reforms, and we always feel sincere support from our international partners.

The Ministry of Regional Development, Building and Housing and Communal Services of Ukraine is carrying out decentralization, energy efficiency, and deregulation reforms in the construction area. Their goal is to increase the regional human development index and the region competitiveness index. Today, the results of these reforms are obvious.

The decentralization reform has enabled us to delegate to local authorities the power, resources, and responsibility. In this way, we strengthen local communities, provide them with opportunities to independently determine development strategies, attract investors, and implement infrastructure projects. 865 of self-sufficient united communities have already been created. These are new managerial teams with new opportunities, resources, and management approaches that shape a new European management system across the country. Fiscal decentralization and state support work as a powerful financial instrument for strengthening communities. Ukraine has become one of the most financially decentralized European countries. Local budgets already make up over 52% of the consolidated budget of Ukraine. State support for regional

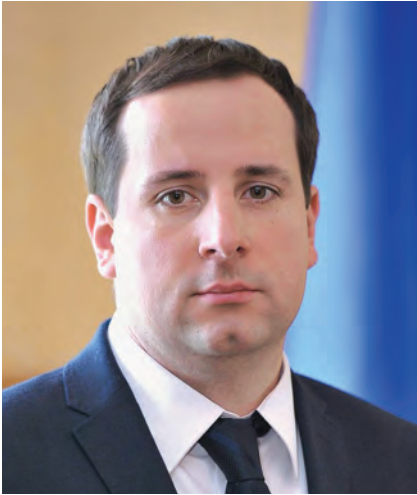
development has increased 39 times in comparison with 2014. These are new opportunities for creating affordability and quality of services for community members (in the field of education, medicine, administrative services, etc.).

The energy efficiency reform has a multiplier effect for economy, opens a window of opportunities for innovation and investment, launches a huge energy audit market and the market of modern building material production, enhances the development of architectural and design organizations. With the support of our international partners, we have started the Energy Efficiency Fund—the main reform instrument. The economic effect of its operation will reduce gas consumption and imports up to 10 billion cubic meters, will increase the annual capacity of the new energy-efficiency market up to UAH 60 billion, and create 75 thousand new jobs for engineering and construction personnel, energy service industry, and energy management.

We systematically deregulate the construction industry, simplify the terms of doing construction business in Ukraine as much as possible, reduce permitting procedures and make them maximally transparent, as well as reconsider the State Building Codes. We implement a European approach to permitting and approval procedures in construction. That has enabled Ukraine to make a real breakthrough in the deregulation in construction over the past two years. Last year in the Doing Business rating, Ukraine moved 105 positions up in the deregulation in construction and ranked 35<sup>th</sup>. This year, it has moved 5 positions higher and became one of the top 30 of 190 countries in the ranking. By the Obtaining Permit for Construction component, Ukraine has outstripped Austria, Poland, Finland, Latvia, Canada, and even Japan.

In addition, we have started the State Building Codes reform. These are almost 500 qualitative changes, which will subsequently turn Ukrainian cities into modern, European, and comfortable ones. This forms the transparent conditions for city building and opens the industry for international investment.

When introducing changes in Ukraine, we always feel the support of our international partners, both financial, organizational, and technical. The participation of the world's leading institutions and organizations in the process of global change in Ukraine testifies to their success and perspective.



**OLEKSANDR SAIENKO**

Minister of the Cabinet of Ministers,  
Head of the Reforms Delivery Office  
under the Prime Minister

**DEAR FRIENDS,**

Please accept my sincere greetings to the members of the American Chamber of Commerce in Ukraine — one of the most powerful associations of enterprises and entrepreneurs in Ukraine. Your point of view concerning the economic situation is always accurate, honest, and relevant. We are engaged in a constructive and effective dialogue that results in important legislative initiatives aimed at economic growth, investment attraction, and innovative development.

The year 2018 has been the year of stable economic growth. According to the results, the first half of the year saw a 3.8% GDP growth. The positive dynamics of industrial production has been restored. Export growth exceeds 12%, with almost half of products supplied to the European market.

Together with our EU partners, we have continued the reform of public administration by implementing the next stage of the reform of the civil service and have elected independent supervisory boards at the largest state companies — Ukrzaliznytsya, Ukrenergo, and Ukrposhta.

We have held several Government meetings on deregulation issues and have abolished hundreds of unnecessary regulations impeding business development. This initiative has developed “Stop Masks Show” laws that actively counteract the pressure exerted on the business.

Many of these initiatives have been introduced for the first time. For example, the support of innovations at the level of scientific development and production, update of industrial capacities, and introduction of new construction standards developed on the basis of best international practices with allowance for the requirements of energy efficiency and environmental friendliness.

All these steps are united by the key goal — to support the economic growth, to reach the figures of +5–7% of GDP per year and to become a powerful economy in the region able to be a reliable partner and a powerful player in the world market.



### **OSTAP SEMERAK**

Minister of Ecology  
and Natural Resources

### **DEAR CHAMBER MEMBERS,**

As in the previous few years, the government continues to actively work on improving the business climate and raising the investment attractiveness of our country on the international scene. This year has not been an exception.

Thus, for the first time over the years of its independence, Ukraine has begun a subsurface resource management reform in order to finally open the door for investors to that closed “select club.”

It was this year that significant changes were made to the national legislation governing the industry. Thanks to our joint work with experts and business associations, Ukraine is now turning to electronic auctions of special permits for subsurface use. One of the recent decisions was the further reduction of the regulatory burden on business entities when handling geological information and facilitating access to it for potential investors through the digitization of all data and the creation of a unified database of information on natural resources. No less important for business, and large foreign corporations in particular, were changes developed by the Ministry of Ecology and Natural Resources and approved by the Government that finally eliminated the legal conflicts regarding transboundary movements of hazardous wastes and allowed environmentally friendly, high-quality, and timely utilization of worthless pesticides.

In addition, 2018 has become a landmark for the introduction of the laws for environmental impact assessment and strategic environmental assessment, new for our country. We have taken into account all the objective warnings from honest business and can now state that both laws are successfully operating in Ukraine.

We do not stop here. The Government and the Ministry of Ecology and Natural Resources have clearly defined tasks for the future. In particular, to introduce a new model of management of waste of all types, as well as an effective system of monitoring, reporting, and verification of greenhouse gas emission in Ukraine with further implementation of the greenhouse gas emission quota trading system and increasing the renewable energy share in the overall balance of the country. In addition, the Verkhovna Rada is now considering a Draft Law, developed by the Ministry of Ecology and Natural Resources, on Ozone Depleters and Fluorinated Greenhouse Gases, aimed at the introduction of a transparent mechanism for the regulation of circulation of these substances. The development of all these areas is impossible without engaging business with modern technologies and management approaches.

The most important thing for me as the Minister of Ecology and Natural Resources is, first of all, the sustainable development of Ukraine, which, while enhancing its own energy power, would not forget together with business about the importance of environmental safety.

I am always open to constructive cooperation on further liberalization of different economy sectors and improvement of national legislation if constructive proposals come from the socially responsible business, which aims not only at its own development and profit but also reckons with the right of citizens to a clean environment.



**IHOR NASALYK**

Minister of Energy  
and Coal Industry

**DEAR CHAMBER MEMBERS,**

I would like to express my profound respect and gratitude for the long-term cooperation aimed at developing the fuel and energy complex of Ukraine. The Energy Committee has been operating for years within the American Chamber of Commerce in Ukraine. Its mission is to represent and protect the interests of leading international and domestic companies to stimulate further development and modernization of the Ukrainian energy sector.

Attracting investments in the energy sphere is important in view of the challenges foreseen by the Energy Strategy of Ukraine until 2035. We have almost finished the formation of legislative frameworks in the energy industry that is the basis for the safety and trust of investors, and the realization of opportunities in the energy sector of Ukraine.

The American Chamber of Commerce in Ukraine actively supports reforms streamlining for the liberalization of the Ukrainian energy sphere and creating competitive and fair markets of all energy sectors.

Energy security is one of the challenges of our times. In this regard, we take measures to diversify the energy supply and reduce dependence on nuclear fuel supply. The construction of the Central Spent Fuel Storage Facility in cooperation with Holtec International is an important step. Spent nuclear fuel from Ukrainian NPPs will be safely stored there for a hundred years. Also, Westinghouse nuclear fuel is undergoing experimental operation at six out of thirteen operating NPP units with VVER-1000 reactors.

There is successful cooperation in supplying anthracite coal from the United States to Ukraine, which supports the sustainable operation of Ukraine's energy system and is going to significantly improve the country's energy security. A number of companies based in Pennsylvania, USA, have entered into a contract to supply coal for the needs of Trypillia TPP.

This year, within the framework of the visit of U.S. Secretary of Energy Rick Perry to Ukraine, the U.S.-Ukraine Strategic Energy Dialogue was started. Ukraine sees a wide range of opportunities for further cooperation. In particular, our country is interested in attracting American modern technologies and best practices for effective resource development of oil and gas reserves available in our country.

Investors that have already entered the Ukrainian market will fully feel the changes that have already taken place in our country.

Ukraine supports the requirements for openness and transparency, compliance with the Paris Agreement, increasing the share of renewable energy sources, has a road map of key reforms, and is open to dialogue and cooperation with partner countries and financial institutions to implement joint investment projects.

There is no doubt that extending the cooperation between the Chamber and the State authorities will contribute to Ukraine's integration into the world community.



**PAVLO KLIMKIN**

Minister of Foreign Affairs

**DEAR CHAMBER MEMBERS,**

Preparation of a “Ukraine Country Profile” publication by the American Chamber of Commerce in Ukraine has become a good and very important tradition. The review allows not only the American but also the world business to obtain a clear and objective picture of the processes and trends taking place in the Ukrainian economy and to obtain knowledge regarding promising areas for investment and cooperation. It is also very useful to us, Ukrainians, to look at the domestic reality through the eyes of the American analysts.

I think Ukraine can be a pleasant surprise for our Western partners in trade. We have been spending enormous resources on defense against the military aggression of Russia and on the modernization of our army over five years already. However, our economy is not running down, but, vice versa, is rapidly growing despite enormous funds spent on defense.

I think that this can be attributed to such powerful productive force as freedom, not only freedom of business, but of political choice, words, and thoughts. The democracy fought for by the people on Maydan in 2014 acquired its full strength. Most notably, it is visible in the awakening of the political, entrepreneurial, and creative energy of the entire society, which we can finally rightfully call civil.

At the state level, democracy is being implemented in the fight against corruption (I must emphasize, a successful fight) as well as in large-scale reforms in all key areas. For business, these reforms mean, above all, the rule of law, liberalization, dismantling of bureaucratic barriers, transparency and security, and, in a nut shell, transition to Western business practices, standards and rules, which are understandable and well known to foreign partners.

The European choice of Ukrainian society, reforms as well as the fact that Ukraine has become the forefront of the struggle, even the armed struggle, for the civilization values of the West has drastically changed the geopolitical role of our state and, equally important, our geopolitical self-awareness and perception of Ukraine by Western partners.

Accordingly, the pace of our European and Euro-Atlantic integration has accelerated incredibly. Association Agreement, Deep and Comprehensive Free Trade Area, visa-free regime with the EU, active implementation of NATO standards, real strengthening of strategic partnership with the USA — all this unequivocally proves that Ukraine has become an effective participant in the transatlantic space.

If one takes into consideration the size of our country, which is the largest in Europe, its strong economic and scientific potential as well as the highly educated professional population, one will inevitably conclude that investing and doing business in Ukraine has limitless opportunities and great prospects.

I urge foreign business persons to embrace the new reality and boldly master the huge and promising Ukrainian market. Ukrainian diplomacy is always ready to assist you in implementing your initiatives and projects.



**VOLODYMYR OMELIAN**

Minister of Infrastructure

**DEAR FRIENDS,**

On behalf of the Ministry of Infrastructure of Ukraine and myself, I would like to congratulate you on the publication of the “Ukraine Country Profile 2019” special edition. The publication is an important source of up-to-date information on the economic situation in Ukraine, an important contribution of the American Chamber of Commerce in Ukraine to shaping an objective picture of the dynamics of the Ukrainian economy and its investment attractiveness.

Successful investments represent the best indicator of the effectiveness of the state policy, a pledge for the sustainable development of the country and its regions. Therefore, attraction of strategic investors and new technologies, development of public-private partnerships, and creation of favorable business conditions represent the priorities of the daily operation of the Ministry of Infrastructure of Ukraine.

Our conceptual approach is to offer an attractive investment project with a clearly predictable outcome. An investor has the opportunity to see a prospect for himself in Ukraine and to know what to expect from the investment.

The “Drive Ukraine 2030” National Transport Strategy of Ukraine for the period ending 2030 gives investors a clear vision of the prospects for the development of the Ukrainian infrastructure and provide attraction of the more than 60 billion dollars of investments. “Drive Ukraine 2030” is a powerful signal that Ukraine confidently looks ahead and sees itself as a participant of the world transport and logistics processes.

The Ukrainian infrastructure is open for investments and innovations, is actively reformed and integrated into the Global and European infrastructure, and improves development indicators. In accordance with the Global Competitiveness Index 4.0 2018, the Ukraine’s ranking in the global competitiveness index has grown by 21 points — from the 78<sup>th</sup> to 57<sup>th</sup> place — representing an important outcome of the effective cooperation between the Ministry, the businesses, and international partners.

The Ministry of Infrastructure of Ukraine is always open to honest dialogue and cooperation. We are ready to provide all the necessary support in the process of implementing investment projects.

Thank you very much, the American Chamber of Commerce in Ukraine, for an effective partnership and I wish the Chamber and member companies new achievements and successes!



**ULANA N. SUPRUN**

Acting Minister of Health

**DEAR CHAMBER MEMBERS,**

Five years ago, the students were standing on the Maydan Square and demanding changes in the direction adopted by Ukraine. The Revolution of Dignity was the culmination of the dissatisfaction with “business as usual” and a true civilizational change that has set Ukraine on a new path. Five years later much has changed but we still have a lot of work to do to live up to the expectations put forward by the Maydan.

Transformation of the Ukraine’s healthcare system is one of these challenges. Our goal is to ensure that all citizens have equal access to quality health care with clear and transparent rules. Health and education constitute every individual’s “starting life capital.” We are working to ensure that opportunities to build on this “capital” are equal for all Ukrainians. The American Chamber of Commerce is working in accordance with a similar principle: you are establishing new rules in the Ukrainian business market that are just as transparent and clear for everyone. This is essential for improving the Ukraine’s economic situation in general and the development of public-private partnerships in particular.

For its part, the Ministry of Healthcare is working to make the Ukraine’s health sector attractive for investment. This is one of the objectives that we have set for ourselves at the beginning of the transformation of the system. We are liberalizing the investment market. We do not accept the state’s right to a monopoly. On the contrary, the Ministry is interested in eliminating the bureaucratic obstacles that investors may face.

As a result, health care projects account for more than 50% of all public-private partnership projects currently submitted for consideration by the Ministry of Economic Development and Trade of Ukraine. Some pilot programs will start working in 2019. So what we see is that the new model of the Ukrainian health care system is open for business and investment.

Another ambitious goal we are striving to achieve is a healthcare financing paradigm shift from “spending” to “investing.” In most countries of the world, including Ukraine, healthcare financing is commonly viewed as spending. But it is actually a profitable investment, including investment in our “human capital.”

According to the World Bank, Ukraine ranks 50<sup>th</sup> among 157 countries in the new Human Capital Index. On a scale of zero to one, Ukraine scored 0.65. I am convinced that only with the implementation of fundamental changes in the health care and education we were able to receive such a high score and improve upon it. The World Bank asserts that human capital is one of the key factors for sustainable economic development.

The health care system transformation, which has begun with primary care, is evidence-based and focuses on the patient’s individual needs. These changes are already accelerating the Ukraine’s progress towards universal health coverage. We are planning to complete the transformation in 2020. And with such partners as the American Chamber of Commerce in Ukraine, leading investment into the health-care sector, we are confident that the transformation will be a success most importantly for the people of Ukraine.





**ANDRII REVA**

Minister of Social Policy

**DEAR CHAMBER MEMBERS AND REPRESENTATIVES OF BUSINESS AND DIPLOMATIC COMMUNITIES,**

On behalf of the Ministry of Social Policy of Ukraine, I would like to thank the American Chamber of Commerce in Ukraine for the opportunity to extend my sincere congratulations and best wishes from the pages of publication “Ukraine Country Profile.”

The reform process is ongoing in many spheres of public life in Ukraine today. The importance of this process is difficult to overestimate because of complex political and economic conditions that are closely linked with external aggression of the Russian Federation.

Despite this, according to the BDO International Business Compass (IBC), Ukraine has gained 3 positions in 2018 in the rating of investment attractiveness of the countries of the world.

Creation of a favorable investment climate is the key to the development of the country in general and all integral parts of the economy, in particular.

Investments represent an integral part of the successful development of the employment sphere, labor market, and social services as well as improvement of their quality and affordability. Investments and active state support allow us to improve the quality and ensure the availability of social services, which is very important, in particular, for people with disabilities.

The process of decentralization, which is being implemented in the country right now, gives the regions and territorial communities more and more opportunities for self-financing and meeting the essential needs existing in each region.

Implementation of reforms and development of capable communities provide conditions for the sustainable and successful development of the regions and country in general. At the regional level, this will create new opportunities for economic growth, expand job opportunities, and form a favorable business climate.

Further implementation of reforms is the key to the changes needed for Ukraine to become a developed European country attractive for foreign investments.

I sincerely wish peaceful skies, well-being, and prosperity to all of you as well as your families and Ukraine!



**OKSANA MARKAROVA**

Minister of Finance

**DEAR CHAMBER MEMBERS,**

It is difficult to overestimate the contribution of the American Chamber of Commerce in Ukraine to the development of investment attractiveness, business climate, and corporate culture in Ukraine. We have long been convinced that Chamber Members are powerful domestic and international investors since they are interested in Ukraine's success as nobody else.

With your support, with the help of the International Monetary Fund, we continue vital reforms aimed at creating a strong platform for sustainable economic development and increasing the country's investment attractiveness.

We understand the importance of transparent public finance management, tax and customs policy predictability, and responsible debt servicing for investors. In this regard, we continue implementing the medium-term budget planning, we have approved the Debt Management Strategy, and we have created a Bureau that will handle with the latter's implementation. We also plan to finalize the reform of the State Fiscal Service in the very near future.

This year, we have signed Multilateral convention MLI, have prepared Draft Law on 8 steps of BEPS plan, and we hope that the Parliament will ratify the FATCA agreement with the United States of America that will demonstrate our readiness to play by general tax rules and to pursue transparent policy in this area.

Even a superficial glance at the dynamics of economic growth in our country, the possibilities of our agrarian industry, energy, transport or IT demonstrate that Ukraine is a good place for investment. In addition, the improvement of our positions in the various business climate ratings shows that it is possible today and will be even more convenient tomorrow.

In particular, Ukraine has climbed 5 more spots in the Doing Business Ranking (currently occupies 71<sup>st</sup> position) this year and has risen by 41 positions since 2014. Furthermore, we have moved from the 89<sup>th</sup> to 83<sup>rd</sup> position in WEF Global Competitiveness Index 4.0 and in the Investor Relations and Data Transparency Rankings from the Institute of International Finance. Ukraine has showed the greatest progress among the developing countries increasing the overall score from 16 to 36.5 out of maximum of 42.

In addition, the Investment Attractiveness Index of Ukraine, which is determined by the European Business Association on a half-yearly basis, was 3.10 out of 5 possible points in the first half of the year and it is kept above 3 for the second consecutive year demonstrating progress. That is, the efforts that we are applying in this direction are already yielding noticeable results. We are sure that the American Chamber of Commerce in Ukraine that has always been the catalyst for reforms and innovations in Ukraine will continue to be our reliable partner in our endeavors.



**PAVLO PETRENKO**

Minister of Justice

**DEAR FRIENDS,**

I extend my warmest greetings to all readers of Ukraine Country Profile 2019 publication.

Every year, we receive a qualitative and independent analysis of the economic situation in the country thanks to specialists of the American Chamber of Commerce in Ukraine.

The publication is a guideline for entrepreneurs that helps them navigate in Ukrainian day-to-day realities. For the Government, the publication is an outside perspective, an audit of its activities, based on which it is possible to form a more effective state policy to improve the business climate.

Ukraine has changed. The ability to listen to different views and collaborate with representatives of business and society gives us an opportunity to climb every year the Doing Business ranking the World Bank publishes annually. This year is no exception. In the recently published report, we have climbed five steps up and become entrenched in the 71<sup>st</sup> position.

I am very pleased that an important part of this growth are innovations introduced by the Ministry of Justice: opening of registers and launching of online services, simplifying business registration and making changes to company information, guaranteeing the rights of minority shareholders of companies, and solving insolvency proceedings.

At the same time, we continue fighting against such disgraceful phenomenon as asset-grabbing. In 2016, we adopted and began to implement revolutionary legislative changes. They blocked the loopholes for perpetrators for unfair takeover or the seizure of companies and their property, and provided government institutions with additional instruments to counteract that phenomenon.

However, the work does not stop. This year's analysis presented on the pages of the Ukraine Country Profile 2019 publication will be one more indicator for us. Based on it, we will be able to further develop Ukrainian legislation to make our country more attractive for business. Because we understand that it will bring new investments, new workplaces and increase revenues to the national and local budgets.

Strong business means a strong economy. While a strong economy means a strong country. I wish us all success and joint achievements in 2019!



### **MAXYM MARTYNIUK**

Acting Minister of Agrarian Policy  
and Food

### **DEAR CHAMBER MEMBERS,**

Over the recent years, the agro-industrial sector has been considered a Ukrainian center of investment attraction for the companies of different scale from all over the world. Since 2016, the amount of M&A in agriculture has been increasing dynamically – last year, the share of the agro-agreements exceeded 40% of the total amount of such operations. The agro-industrial sector will also secure the dominating position in the investment structure by the end of the current year.

Investors are attracted by the high productivity indicators that may be provided by the Ukrainian land. Over the years of its independence, Ukraine has demonstrated the “Ukrainian agricultural miracle” to the world by increasing the production of crops 2-fold: from 35 million tons in the early 90s to 65 million tons that are expected by the end of 2018. It is not for nothing that TOP-3 M&A agreements last year were signed in horticulture and related sectors.

The Ukraine’s leading position in the world food market and the consumers’ loyalty to “made in Ukraine” label as well as actually unlimited possibilities that are opened for organic produce creation together represent another competitive advantage of the Ukrainian agriculture in attracting the world capital.

Meanwhile, the logistics system that has already reached the limits of its capabilities is a deterrent factor. For various reasons, including objective ones, the transport infrastructure has become a bottleneck in export flows that increase from year to year. In the 2018/2019 marketing year, the volume of crops’ export will exceed 41 million tons+ reaching the highest level in history. On the other hand, the critical need in the development of infrastructural facilities and increase of throughput capacity introduces great possibilities for investors by itself.

Furthermore, a great potential that is assessed by experts at additional 1.5% GDP annually is blocked by the absence of the agricultural land market. Unfortunately, this issue has been transformed from the economic to the politically sensitive one. Moreover, expert discussions related to the model of a future land market that will consider all the risks and balance the interests of all land relations stakeholders is complicated by this factor. In this context, expert support from countries that have already passed all the stages of land market formation will be invaluable for us.

I would like to express gratitude to the American Chamber of Commerce in Ukraine and to all its companies for the contribution to the development of business culture in Ukraine, for being the platform for thought exchange, and for the support of the reforms that are being implemented by the Ukrainian Government.

**YURI LUTSENKO**

Prosecutor General

**DEAR CHAMBER MEMBERS,**

Let me express my respect and sincere gratitude for the support of Ukrainians that is provided by the United States of America in advocating the principles of democracy, sovereignty, and complete independence during the difficult times that Ukraine is currently experiencing. We highly appreciate the help of American people in protecting the territorial integrity and the desire of Ukraine to realize its European path of development.

The process of reforming of all law enforcement agencies initiated by the Ukrainian authorities demonstrates its democratic choice aimed at protecting human rights and strengthening democratic institutions.

In the process of reformation, Prosecutor General's Office of Ukraine got rid of post-soviet powers. We have separated the prosecutor's supervision of the investigation and passed it to the newly established National Bureau of Investigation. We have independent self-government authorities created with the assistance of the American side's Inspectorate General.

We have adopted new legislation and eliminated the most serious corruption schemes. Fighting corruption is a priority for all law enforcement officers. We believe that the inevitability of punishment for criminals and confiscation of their illicit assets is the best response to corruption and demonstration of the effectiveness of the United Nations Convention against Corruption.

We greatly appreciate the high level of strategic Ukrainian-American partnership in the economic sector. Cooperation with the American Chamber of Commerce in Ukraine demonstrates that the development of Ukraine's economy has certain Western inclination contributing to the improvement of business conditions and inflow of foreign investments.

I would also like to take this opportunity and sincerely thank you for your work and assure you of the continued fruitful cooperation between Ukraine and the United States of America in order to preserve the principles of democracy, freedom, and peace in Ukraine and in the world.



**VASYL HRYTSAK**

Head of the Security Service

**DEAR CHAMBER MEMBERS,**

My greetings on behalf of the Security Service of Ukraine. First of all, let me express my sincere gratitude for the support of our state on its path of reform and development.

We are well aware that ensuring the conditions for sustainable growth and better competitive edge of the national economy is impossible without real investment. Today, private investment is working effectively to strengthen the Ukraine's economic potential whose protection has always been a priority for the Security Service.

It is important to accelerate progressive structural changes in the economy, improve the investment climate, reform the tax system, ensure balanced development of the budget segment, and fully overcome such phenomena as corruption and the shadowing of the economy. And, of course, the state must guarantee ownership rights through a fair system of justice that we are currently reforming. Within its powers, the Security Service of Ukraine is doing its utmost to support this process.

A year ago, we introduced best practices into legal cooperation with the private sector based on trust and joint protection of the interests of the state and its citizens. The Security Service of Ukraine signed Memorandum of Partnership and Cooperation with the Business Ombudsman Council and the Union of Ukrainian Entrepreneurs. Within the framework of the cooperation, there is a specialized expert group responsible for fast-track assessment of pressing issues in the relations between the SBU and business structures, for analysis of potential conflicts and corruption risks, and for improvement of the current legislation. The chosen format of cooperation has already proved its efficiency. According to the Business Ombudsman Council, the Security Service of Ukraine has the highest implementation rates of Ombudsman's recommendations among all law enforcement agencies of Ukraine.

The Ukraine's Security Service participates in regular meetings with the leaders and representatives of the American Chamber of Commerce in Ukraine, the Union of Ukrainian Entrepreneurs, the European Business Association, and the Business Ombudsman Council, to hold discussions both on the problems of interaction between the Security Service of Ukraine and business and also the urgent issues relevant to support and development of domestic business.

Protection of the business environment from cyber-crime is another important area of cooperation between the SBU and business. At the beginning of this year, the NATO-Ukraine Trust Fund supported the creation of the SBU Cyber-Security Situation Centre that currently provides the private sector with the unique opportunity to receive highly qualified advice from the SBU specialists as well as to connect to the Center's computer system in order to detect and localize negative consequences of cyber-attacks in a timely manner.

The SBU's top command is clearly aware that it is the matter of national security to create, within its area of responsibility, favorable conditions for the effective functioning and development of private business in Ukraine. Consequently, I want to assure that we will continue to strive to develop a public-private partnership in order to strengthen the Ukrainian economy and increase the well-being of our citizens.



### **OLEKSANDR TURCHYNOV**

Secretary of the National Security and Defense Council

### **DEAR CHAMBER MEMBERS,**

After over more than a quarter of a century of operating in Ukraine, the American Chamber of Commerce in Ukraine has become one of the most effective and influential non-governmental organizations that unites large strategic and institutional investors and represents their interests expanding the horizons of cooperation between the United States and Ukraine.

The active participation of the Chamber helps the Ukrainian Government reform the key sectors of the Ukrainian economy, improve the business conditions and the investment climate, which is the key to the revival of Ukraine. Through ongoing dialogue with the Chamber Members, domestic legislation is being systematically improved in line with the best international practices.

This refers to the public administration, the fight against corruption, the anti-monopoly policies, the banking sector, the taxation and investment, the protection of intellectual property, and the improvement of law enforcement practices. Ukraine Country Profile publication prepared by the Chamber's experts is among the best analytical developments that contribute to the improvement of the international image of our country.

Today, despite the Kremlin hybrid war whose integral part is trade and economic aggression, Ukraine is successfully integrating into world markets; it is ranked 71<sup>st</sup> among 190 countries in the Doing Business 2019 Business Ranking having risen by 5 positions in comparison with the past year's rating. Investors begin to believe in the successful economic future of our state.

The key to sustainable economic growth in Ukraine as well as reforming the security and defense sector of Ukraine in line with NATO standards is to attract large investments and new technologies. Cooperation with Chamber Members in this area is an important part of our partnership.

I thank you for your many years of operation and look forward to future effective cooperation of the American Chamber of Commerce in Ukraine with the domestic and foreign business environment in order to improve the economic situation in our country and establish its image in the world as an open and democratic European country.



## **YAKIV SMOLII**

Governor  
of the National Bank

### **DEAR FRIENDS,**

I am pleased to note that 2018 has been a testimony to how consistent and independent central bank policy and its cooperation with the business community can be favorable to macrofinancial stability and investment climate. Today, the Ukrainian economy is growing, inflation is declining, and the banking system is stable, capitalized, transparent, and profitable. Meanwhile, the business climate is gradually improving as a result of progress in the reforms that are brought to life thanks in particular to the contribution and support of the American Chamber of Commerce in Ukraine.

The new program of cooperation between Ukraine and the IMF lays the groundwork for further strengthening of macrofinancial stability. Not only does it facilitate Ukraine's passage through a year of significant debt load, but it also sets benchmarks for state policy thereby reducing the uncertainty for businesses and financial market participants in the election year. Although the next year will not be easy for Ukraine, we will continue to work on ensuring prices and financial stability and implementing reforms. The NBU's priorities are identified by our Strategy for the coming years that we approved in the spring of this year.

Our top priority is to gradually reduce inflation and stabilize it at our target level of 5% +/- 1 p.p. We expect to achieve that in the beginning of 2020 primarily through the monetary policy tightening that the NBU has been conducting since the fall of 2017.

We are on our way to modern, transparent, and liberal FX regulation. The Law On Currency and Currency Operations – informally known as “visa-free travel for capital” – will take effect in February 2019. All existing restrictions will be gradually removed, and eventually FX transactions in Ukraine will be conducted on the principle that “everything that is not expressly forbidden by law, is allowed.” This will facilitate the conduct of international economic activities by businesses, and open our country up to an inflow of foreign capital.

Meanwhile, in order to accelerate FX liberalization, we are collaborating with the Ministry of Finance on improving the efficiency of tax regulation. We count on lawmakers to adopt unified requirements next year that will enable the transparent conduct of business in Ukraine in compliance with international standards that the BEPS Action Plan has outlined. This has become a strategically important prerequisite for maintaining financial stability as Ukraine transitions to the free movement of capital.

The banking system continues to improve and develop. Coupled with a systemic solution to the problem of non-performing loans, the Law On the Protection of the Rights of Creditors and Investors adopted this year will reduce risks faced by lending banks and the cost of credit for borrowers. Together with the new macroprudential policy and risk-based banking supervision that the NBU is introducing already, it will transform the banking sector into a solid base for businesses and economic growth.

The NBU stands ready to continue to cooperate with businesses and financial market participants – the ACC members to spend the next year together in stability without slowing the pace of the reform.





### **YURIY TERYTYEV**

Head of the Antimonopoly  
Committee

### **DEAR MEMBERS OF THE AMERICAN CHAMBER OF COMMERCE IN UKRAINE,**

I am happy to greet you on the occasion of the Ukraine Country Profile 2019 publication.

The never-changing slogan of the agency, which I have the honor to represent, is “Competition brings prosperity.” The Committee makes great efforts to put these words into deeds every day.

The implementation of initiatives aimed at bringing the national legislation on economic competition protection to the best world standards is one of the AMCU key priorities in its reforming efforts. Working side by side with other governmental bodies, in particular with the Parliament’s Committee on Economic Policy, allowed us to write those changes down in draft bills. Their adoption shall significantly increase the agency’s operation efficiency. Those changes constitute our direct obligation before the international expert community. The necessity of their adoption arises from the recommendations set forth in the Competition Law and Policy in Ukraine 2016 OECD review, and the Committee is devoted to implementing them. The AMCU will continue its path to becoming stronger, more transparent, predictable, and constructive in the process of its interaction with business.

Reforming of the agency itself is constantly carried out; its structure and functions are being adapted to the current needs and challenges. Our goal is to ensure the efficiency of violation detection and investigation. The AMCU Departments are constantly monitoring the situation on the most important markets; the staff professional level is growing. The Economic Analysis Department, the Legal Department, and the AMCU Regional Offices Planning and Coordination unit are functioning effectively. The paradigm of planning and economic effect assessment of the AMCU bodies’ activities is working, which is an evidence of any competition agency’s successful operation.

At the same time, it is worth mentioning that direct development of the competitive environment is not the prerogative of the Committee only. According to the current legislation, central and local governmental bodies are responsible for monitoring and analyzing the situation in the relevant sectors and developing measures for demonopolization and competition strengthening. This is exactly why the AMCU is drafting the concept of national competition strategy in order to finish it by the end of this year. The document mentioned above is a milestone, and we are determined to engage representatives of all the key governmental bodies in its drafting as soon as it is approved in general. The document shall define long-term priorities for all national economy sectors and instruments for their achievement from the perspective of economic competition development.

In the year 2019, the AMCU will be hosting the International Competition Network (ICN) Competition Advocacy Workshop for the very first time in its history. The most prominent economic competition experts from all around the world will come to Ukraine in order to exchange the best practices and experience in the spheres of competition enforcement and advocacy. The very fact of the ICN providing the AMCU with an honor to host such a high-level workshop is an evidence of acknowledgment of the Committee’s achievements, especially in the course of reforming the agency. We are open to new ideas and ready for changes.

While addressing the Chamber’s representatives, I would like to highlight that the Antimonopoly Committee of Ukraine is always interested in finding new partners and maintaining connections with the old ones in order to constantly receive relevant information about issues that fall under the AMCU’s competence and to spread the standards of fair competition practices among the markets of Ukraine.

I wish you the best of luck in achieving ambitious goals!



### **OLEKSANDR VLASOV**

Acting Commissioner  
of the State Fiscal Service

### **DEAR FRIENDS,**

I congratulate the American Chamber of Commerce in Ukraine, business representatives, organizers, and readers on the next issue of the Ukraine Country Profile 2019 publication, which helps create an unbiased view of the peculiarities of Ukraine's economic development, its investment attractiveness, prospects, and opportunities.

During the years of its activity in Ukraine, the American Chamber of Commerce in Ukraine has established effective cooperation with state institutions, made a significant contribution to creating favorable conditions for domestic and international business, and resolved many urgent issues.

The State Fiscal Service of Ukraine fruitfully co-operates with the American Chamber of Commerce in Ukraine to improve the tax and customs system of Ukraine and to introduce European-level services. Such cooperation is reflected in the systematic meetings of Chamber Members with the SFS specialists. In addition, since 2013, the American Chamber of Commerce in Ukraine has been a permanent member of the Investment and Entrepreneurship Promotion Council at the SFS, which is the platform for an effective dialogue between the SFS and the business community.

Currently, the priority for world public administrations is to electronize services. The SFS is developing successfully in this area and has already achieved some positive results, which have been reflected, in particular, in the Doing Business rating: Ukraine has improved its result by moving five positions up and ranked the 71<sup>st</sup>. In the Taxation category, Ukraine has moved 110 positions up over the past four years. Such results are a green light for the investors who are just considering and exploring the opportunities of the Ukrainian investment market.

Today, the State Fiscal Service is making every effort to facilitate doing business in Ukraine and attract investment in the Ukrainian economy. The focus is made on building IT services that allow business entities to spend a minimum amount of time to carry out their activities. Gradually, the conditions for doing business in Ukraine are becoming simpler and more comfortable.

Today, more than 9 million users use the taxpayer e-cabinet. We have already completely implemented the options of the e-cabinet for individuals and are going to launch 100% online services for legal entities by the end of the year. In addition, VAT is refunded in an absolutely transparent mode. The average monthly tax refund request increased by almost 20% in 2018: to UAH 11.5 billion. Over 85% of the amounts are reimbursed within a month by the results of desk audits. And, consequently, business can predict its activity and quickly replenish its working capital. An E-Receipt (an electronic check) system has been introduced in the test mode, which is an important and necessary service for the unshadowing of economy. In the near future, the SFS plans to introduce an electronic excise mark, which is going to put an end to backdoor sales of excisable goods, and an electronic audit that will allow detecting most of the risks before auditing, will significantly accelerate and simplify the data analysis procedures, and significantly reduce the work time expenditures of both officials and taxpayers for auditing.

In the customs sphere, the SFS is also moving ahead. Almost 90% of the declarations are executed on the "single window" principle.

An important innovation should be the introduction of an electronic ticket, which will accelerate the implementation of customs procedures when crossing the customs border. The pilot project will be implemented with the participation of the EUBAM mission.

We are pleased that the public and the business community are actively cooperating with us in the direction of reform, and this interaction is the key to successful implementation of the SFS's forward-looking plans. After all, an efficient and effective fiscal service that meets international standards and stimulates business is the foundation of a strong state.

I am confident that the SFS and the American Chamber of Commerce in Ukraine have many ways and opportunities for fruitful cooperation in the future. We have a lot of constructive solutions ahead.



**KSENIIA LIAPINA**

Head of the State  
Regulatory Service

**DEAR CHAMBER MEMBERS,**

Please accept my greetings of the regular release of the “Ukraine Country Profile 2019”. I am confident that a detailed analysis of the economic situation in Ukraine provided in this publication will contribute to promotion of our country’s economic potential.

I would like to express my sincere gratitude to the American Chamber of Commerce in Ukraine for the active operation aiming at developing the Ukrainian-American economic collaboration and also for a weighty contribution to the development of the Ukrainian entrepreneurship.

Small and medium enterprises (SMEs) are the mainstay of the economy of every country. Specifically, the entrepreneurs are the purveyors of new progressive ideas and bold intentions that have been implemented in successful business-projects. In return, the authorities have to create a favorable business climate both for domestic and foreign investors.

Ukraine has been moving steadily in that direction. We proceed along the road of business environment deregulation by removing excessive and inefficient state regulations and by abolishing unnecessary barriers and outdated procedures. The State Regulatory Service of Ukraine has a “filter function” aimed at reduction of the bureaucratic burden on business.

This year’s 71<sup>st</sup> rank of Ukraine in the Ease of Doing Business ranking illustrates the progress towards creating a favorable investment climate in our country.

I am convinced that we will meet the goals we have set and we will unleash the investment potential of Ukraine by joined efforts of authorities, businesses, and international partners.

Let me wish the Members of the American Chamber of Commerce in Ukraine every success in your endeavors and translating new ideas into reality. I look forward to our fruitful collaboration.



### **VOLODYMYR LAPA**

Head of State Service for Food Safety and Consumer Protection

### **DEAR CHAMBER MEMBERS,**

Due to its resources, human capital, and the home market capacity, Ukraine is a state with freedom for investment activity. The domestic agro-industrial complex is of particular interest and has the highest qualitative potential for attraction of investments and influence on the state's economic stability.

Conscious of its internal reserves and the global need for supplies, Ukraine is placing an increasing emphasis on creation of acceptable transparent rules of the game and bringing to its market such powerful global players as Members of the American Chamber of Commerce in Ukraine (ACC).

An automated system of a "Single Window" for customs clearance of goods and vehicles has been introduced in Ukraine for more than two years. Since the State Service of Ukraine for Food Safety and Consumer Protection operates in this system in most areas of control, it intends to maximally improve all procedures at the border crossing, in particular through the introduction of a risk-oriented approach during the state control.

The improvement of phytosanitary procedures in Ukraine has been given special priority, taking into account the progressive international practice. The Parliament has adopted the Law of Ukraine "On Amendments to Some Legislative Acts of Ukraine

on the Settlement of Certain Phytosanitary Procedures, which, in essence, resolves a number of issues of the plant protection system functioning and minimizes the costs and risks of agricultural producers and plant product exporters. This, in turn, raises the efficiency and quality of phytosanitary procedures and increases the investment attractiveness of Ukrainian agrarian business.

The State Service of Ukraine for Food Safety and Consumer Protection intends to continue this work. In particular, currently, the task group at the State Service of Ukraine for Food Safety and Consumer Protection is finalizing its work on a revised version of the Draft Law "On Veterinary Medicine", which should regulate legal relations in matters of animal health and welfare, private veterinary practice, circulation of veterinary preparations, etc. In addition, a new Draft Law "On Plant Protection" is on the agenda. This document provides for the introduction of amendments to twenty-nine domestic laws and regulations, in particular, the introduction of pro-European approaches to the regulation of the use of plant protection products.

After the enactment of the Law of Ukraine "On State Control over Compliance with Legislation on Food Products, Forages, Animal by-products, Animal Health and Animal Welfare" there has been substantially intensified the work on eliminating adulterated products from the market, which equates the competitive environment. While with the approval of the criteria for assessing the degree of risk of economic activity and the procedure for determining the periodicity of planned state control of market operators carried out by the State Service of Ukraine for Food Safety and Consumer Protection (Resolution No. 896 of the Cabinet of Ministers of Ukraine dated October 31, 2018), this work is going to be strengthened in 2019.

Taking into account the positive experience of cooperation of the Service with the ACC and the interest of all parties in creating a favorable environment for diverse development and progress, we call on the Members of the American Chamber of Commerce in Ukraine to engage as widely as possible in the work of the State Service of Ukraine for Food Safety and Consumer Protection.

We believe that reforms at the state, legislative, and institutional levels will ensure Ukraine's qualitative progress to enter the global arena and provide more rights to the business community.



**YULIYA KOVALIV**

Head of Office of the National  
Investment Council

**DEAR CHAMBER MEMBERS,**

The Office of the National Investment Council is happy to see you all among the Council's long-term partners and active advocates of the improvements in the business and investment climate of Ukraine. The most recent success stories are reflected in this year's issue of "Ukraine Country Profile 2019". The majority of the implemented reforms resulted from the collaborative leadership attitude that the Government, the Chamber, and the Council have been demonstrating along the way.

This year, we have seen steady strengthening of the Ukrainian economy. A number of new international companies have started operating on the Ukrainian market and many existing businesses have expanded their investments significantly. It will be a year to remember because the dialogue between the government and the business community in Ukraine has never been that intense and productive. On May 20, the representatives of the Council member companies with their total capitalization reaching \$1 trillion gathered at one table with Ukraine's government for an open and result-oriented dialogue. They discussed achievements and future steps to be taken to make Ukraine the most attractive investment destination in Europe. It was a pleasure to hear the acknowledgement of the progress towards making it easier to do business in Ukraine. It means that we are on the right track.

The Ukraine's economic reform course has been gradually picking up steam. In 2018, the country has moved 5 points up in the World Bank's Ease of Doing Business annual ranking. If we take a glance back, with its gain of 24 positions in 2014–2018, Ukraine has shown one of the best growth dynamics in the ranking participant list. This accomplishment has been possible because of the ongoing support and contribution from the Chamber members.

Together with you, we keep working on further to attract new investors to the Ukraine's transport infrastructure, IT, agriculture, energy, manufacturing, and other sectors. Thank you for your active position and strong confidence in the Ukraine's investment potential. A lot still has to be done, so we look forward to join efforts and achievements in 2019.



**DANIEL BILAK**

Chairman of UkraineInvest,  
Chief Investment Adviser  
to the Prime Minister

**DEAR CHAMBER MEMBERS,**

It is the pleasure of the entire team at UkraineInvest to greet the publication of the next issue of the “Ukraine Country Profile 2019” prepared by the American Chamber of Commerce in Ukraine. The ACC remains a powerful voice on behalf of its members and has become an important catalyst of the comprehensive transformation that is currently happening in Ukraine.

Close collaboration with the Chamber and other organizations in 2018 has enabled the Ukrainian government to achieve encouraging results in addressing many systemic issues encountered by companies and undermining the business environment. In particular, our cooperation has yielded results in the areas of deregulation, on-going reform of the tax administration system, curbing investigative abuses of business by law enforcement agencies, fighting contraband, lowering port fees, and regulatory convergence under the EU-Ukraine Association Agreement, etc. According to the statistics provided by the Business Ombudsman Council, the past quarters witnessed a steep drop in complaints from business regarding unlawful actions of government bodies — this corresponds to the steady drop in cases UkraineInvest has received over the past year as well.

Due to our combined efforts, Ukraine has climbed five more places in the World Bank’s Ease of Doing Business ratings (to 71 out of 190 countries), and Ukraine has occupied the second place among the countries of the world over the past 10 years with respect to the speed and depth of the improvement of the business climate.

Furthermore, the Chamber’s robust advocacy has facilitated the unlocking of over \$700 million of new investment from existing investors many of whom are ACC members thereby creating the success stories Ukraine needs to promote the country among the new investors.

As a result, at UkraineInvest we see that Ukraine has turned the corner as an attractive investment destination. The country now competes head-to-head in the “premier league” of EU countries in the CEE region for new investment from global companies in many sectors, including in automobile parts manufacturing, agribusiness and logistics, and renewable energy. Indeed, we have seen FDI flows of \$12 billion during 2015–2018 resulting in the construction of over 80 plants representing tens of thousands of new high-added value jobs.

The Chamber will remain our essential and valued partner in Ukraine’s process of transformation. We look forward to collaborating with your members as we build prosperous European Ukraine together.

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## WHY UKRAINE IS REAPPEARING ON US INVESTORS' RADAR SCREENS

When I was an eight-year-old boy growing up in London in the late 1970s, my schoolteacher asked our class to show on the map where in Britain our parents were born. When it was my turn, I walked to the other side of the blackboard where the world map hung and proudly exclaimed that my parents came from Ukraine.

But when everyone looked at the map, I was horrified to discover that the country I had so excitedly announced wasn't there; instead, there was just a colossal landmass identified as the Union of Soviet Socialist Republics. I tried to convince the class that such a country really did exist, but I didn't have much luck: it simply wasn't on the map.

That was my first attempt at promoting Ukraine in public, and it wasn't a great success.

These days, I make a living advocating for businesses in Ukraine, and I'm still running into barriers. As in my London classroom, many American and international investors haven't yet detected Ukraine on their radar screens.

That's not necessarily surprising. For many years, the country was mismanaged by a small cohort of greedy oligarchs and their cronies, and it became internationally recognized as a haven of corruption and vested interests, a terrain inhospitable to foreign investors.

That now appears to be changing. Just two months ago, President Petro Poroshenko invited me to the

first meeting of Ukraine's National Investment Council, a platform for dialogue between business, government, and the global investment community. Around the table sat two dozen leading global chief executives of companies with a combined market capitalization in excess of \$900 billion. These top bosses had flown into Kyiv especially for the meeting.

And some of them are already benefiting from Ukraine's resilient economy and financial reforms. Cargill, for example — America's largest privately owned corporation — is in the final stages of constructing a deep water terminal on the Black Sea near Odesa. The facility will accommodate post-Panamax vessels and provide transshipment of Ukrainian grain to customers across the globe.

But Ukrainian farmers have been crippled in their efforts to export millions of tons of grain, due to the overloaded national railway system. Enter General Electric. GE Senior Vice President Jamie Miller was at the table and shared details of a recently-signed diesel locomotive framework agreement with Ukraine, valued at over \$1 billion. GE will provide thirty new locomotives to Ukraine's state railway later this year, and will supply a total of 225 engines over the next decade, with up to 40 percent of parts and production taking place in Ukraine.

Also at the table was Lakshmi Mittal, the London-based chairman and CEO of ArcelorMittal, the world's number one steelmaking company. His



Photo: kvsz.com



business has already invested \$9 billion over the years in Ukraine's largest steel mill.

New York headquartered companies Bunge and Westinghouse are also actively expanding in Ukraine. The former recently launched a new \$280 million oilseed refinery, terminal, and grain storage in the port of Mykolaiv. The latter now supplies nearly half of Ukraine's nuclear fuel — which is significant in a country where nuclear power accounts for 55 percent of electricity generation.

The American Chamber of Commerce in Ukraine has been monitoring the investment climate since 1991. Unmistakably, Ukraine has implemented more reforms since the Revolution of Dignity in 2014 than it did over the previous two decades.

This positive trend is highlighted in the World Bank's Doing Business ranking, the institution's signature report on the ease of doing business around the world. Ukraine leapt an impressive sixty-one positions between 2013 and 2018, from 137<sup>th</sup> place to 76<sup>th</sup>. The criteria indicate better—usually simpler—regulations for businesses and stronger protections for property rights. Our own survey earlier this year demonstrated that 63 percent of members of the American Chamber of Commerce saw their business grow in Ukraine in 2017. Out of 600 member companies, 82 percent reported that they are planning to expand their business in Ukraine this year.

Ukraine's National Bank has done a commendable job cleaning up the banking system, imposing

more stringent regulations, and closing ninety of the country's 180 banks. This cleanup of a dysfunctional banking sector dominated by oligarch-owned banks has resulted in fewer but bigger and more transparent lenders. By no means is Ukraine out of the woods yet, however. Much still needs to be done to prove to investors that there is no going back to the old ways of doing business.

Continuation of the IMF program is absolutely essential to return investors' trust. Ensuring the rule of law through full-scale judicial reform, removing unlawful pressure on business, and assuring protection of intellectual property rights are just a few of the key reforms Ukraine still needs to undertake. The country is also not done eradicating the oligarchic system and replacing it with a functioning market economy.

Unlike forty years ago, my former schoolteacher and all of my old classmates would probably find it relatively easy to find Ukraine on a world map today. But the country doesn't yet fully register in international business circles. Now is the time for strategic global investors to take another good look at Ukraine and what it has to offer.

By Andy Hunder for Atlantic Council



## FIVE WAYS TO ENTICE UKRAINIANS TO COME HOME

“There are 52 million of us,” went the catchphrase that was broadcast every evening on popular Ukrainian television channel 1+1 in the 90s. The numbers were based on a 1989 population census.

It is uncertain how many people live in Ukraine today. Following Russia’s 2014 invasion and a subsequent significant labor migration outflow, the number has contracted by at least 10 million over the past two decades.

Approximately five million Ukrainians, roughly 25 percent of the country’s economically active population, work abroad. Around two million live in Poland. I visited Warsaw this summer; out of six Uber rides that I took, four of the drivers were Ukrainian. A key reason for this hefty flight is that Ukraine has the lowest average monthly salary in Europe, a meager \$320. The workforce in Poland earns four times more. In 2018, Ukrainians will send home \$11 billion in remittances, a whopping 10 percent of the country’s gross domestic product.

As Ukrainians continue to leave, the toll in the motherland is being felt.

As president of the American Chamber of Commerce in Ukraine, I hear from member companies about the challenges they face in retaining and recruiting staff, both blue and white collar personnel. Some are flagging this as a risk in their business strategies and budgets, as the matter could impact their future operations in Ukraine. While Ukraine’s economy continues to

grow, it is becoming more grueling to find good employees. One general manager of a large food and beverage manufacturer told me that four delivery drivers had left their jobs in one week and moved to Poland. Another local manager lamented that he couldn’t find a forklift driver for two months. Consultancies and law firms are also finding it more difficult to hire legal and business advisors.

Although not critical at this point, the issue could further escalate and eventually deter investors and companies from setting up business in Ukraine.

This is not a new phenomenon. Over the past century, Ukraine has seen at least four waves of political and economic migration, resulting in a significant diaspora that is predominantly in Canada and the United States. The Ukrainian World Congress, the international coordinating body for Ukrainian communities abroad, claims to represent 20 million Ukrainians.

But is it realistic for human capital to move from a more developed country to a less developed one? India, the nation with the world’s largest diaspora, was one of the first countries to experience reverse brain drain. To motivate people to return, the government supports research and development centers, particularly in the spheres of technology, healthcare, and pharmaceuticals.

China is also undergoing a reverse brain drain, with Chinese scientists, doctors, professors, and



technicians returning. Some reckon that the reason is China's achievement in building top-notch research institutions and universities, and the result is that China is gaining from the knowledge and experience they're bringing back. So, what would it take to get Ukrainians to return home?

The obvious factors include security, rule of law, a strong economy, affordable housing, low crime rates, accessible and high quality healthcare, and education. These undertakings will not be solved in a few years.

In the short term, Ukraine's government recently urged large businesses to pay higher wages. Our own recent survey showed that practically all of the members of the American Chamber of Commerce have already increased salaries for their employees over the past twelve months, with 25 percent of companies raising their staff's compensation by a third.

There are, however, some other initiatives worth considering. Here are five that the government should consider undertaking.

First, initiate a program together with academia, NGOs, business, and diaspora organizations to recommend tangible proposals and incentives that would reverse brain drain and encourage migrants to return home. Young Ukrainians who studied or worked abroad and then returned home are already working to transform their country, working in the public and private sectors, and they should be supported.

Second, boost programs supporting small and medium-sized enterprises, encouraging returning Ukrainians to invest their remittances and accumulated savings by launching local businesses, thus utilizing the skills and experience they learned while living abroad.

Third, share stories of flourishing international and local companies operating in Ukraine. I often travel across the country and am inspired by the many stories I hear. These need to be emphasized. The National Investment Council and Ukraine Invest, agencies established to promote Ukraine as an investment destination, are a big step in that direction. Fourth, study the feasibility of select dual citizenship. Ukraine does not allow its citizens to hold two passports, largely due to the potential security risk. This risk should be taken seriously. However, a comprehensive review should be considered for those already holding two passports and for the diaspora.

Finally, get the diaspora involved. Launch a campaign to encourage diaspora Ukrainians to visit and consider relocating to Ukraine. This could help to promote opportunities in sectors such as education, business, public administration, and volunteering. Ukraine's growth forecast of 3.4 percent is not yet significant enough to bring about a mass homecoming. But now is the time to get things moving: Ukraine's next census is scheduled for 2020.

By Andy Hunder for Atlantic Council



## GIVING THANKS FOR THANK YOU: UKRAINE'S BUSINESS COMMUNITY EMBRACES GRATITUDE

As McDonalds prepared to open its first restaurant in the Soviet Union in 1990, the fast food company embarked on a program to train its future staff to smile and thank customers. During the training session one of the young new hamburger restaurant recruits raised his hand and asked the American instructor: "Why should I say thank you? I'm the one with the meat!"

Soviet customer service was notorious for showing no gratitude. Much of that is now history. Saying thank you has become such an important component in business, thanking customers, staff, and commercial partners. US President John F. Kennedy wrote, "We must find time to stop and thank the people who make a difference in our lives," and he's spot on.

Four years ago, the American Chamber of Commerce in Ukraine launched a Thanksgiving event that has become an annual ritual. In autumn AmCham members are asked to nominate projects or individuals that have made an outstanding contribution to the development of business in Ukraine, or promoting the country internationally. The Thanksgiving award is then presented onstage at an exclusive black-tie dinner ceremony in mid-November with a turkey and all the fixings.

In 2015, the year after Ukraine's Revolution of Dignity, Minister of Finance Natalie Jaresko who was instrumental in restructuring the country's post-Yanukovich era debts, received the first award, as did Minister of Trade and Economy Aivaras Abromavicius, who, with his team, introduced ProZorro, a public e-procurement system that has made government procurement more transparent and competitive. Ukraine's mobile phone operators, who had just launched third generation mobile communications in the country, also got an award, as did the European Bank for Reconstruction and De-

velopment, Ukraine's largest investor, for boosting investment into the local economy. In November 2016, US Secretary of Commerce Penny Pritzker received the award for her continuous support of Ukraine. The Business Ombudsman Council, a first point of contact for companies seeking redress against unfair government treatment, was awarded for simplifying bureaucracy. The highlight of the 2016 ceremony was the presentation of the award to Ukraine's Paralympic Team for their unbelievable will to win; they had returned from the Rio Olympics with a record 41 gold medals.

Dr. Ulana Suprun, the passionate and professional acting minister of health, was awarded in 2017 for revamping Ukraine's healthcare system. Last year we also presented a special award to Morgan Williams, president of the US-Ukraine Business Council for ten years of outstanding leadership and dedicated service promoting US-Ukrainian business relations.

This year, on November 17, we recognized Ukraine's National Investment Council and Ukraine Invest, two investment promotion agencies established to advance Ukraine as an investment destination. Acting Minister of Finance Oksana Markarova was recognized for reinforcing Ukraine's macroeconomic stability.

The American Chamber of Commerce in Ukraine has many people it is grateful to, people who are changing Ukraine each day, every day. Thanksgiving is a time to thank all those making Ukraine a better place to do business. In 2019, the Thanksgiving feast will take place after Ukraine's spring presidential elections and right after the October parliamentary elections. We hope that we will have plenty to be thankful for.

By Andy Hunder for Atlantic Council



## WHY 2019 WILL BE YEAR OF CONTINUED GROWTH FOR BUSINESS IN UKRAINE

Ukraine is back on the front pages of the world's top newspapers. Twice in the past three weeks Ukraine featured on the cover photo of the Financial Times. The headlines read: "US Backs Kyiv in Naval Clash with Kremlin" and "Kyiv Splits from Russian Church." The news headings highlight the U-turn that Ukrainians have made shifting away from Russia and turning to the West ever since the 2013–2014 Revolution of Dignity.

The same shift is also happening in business. Earlier this year, I visited Mondelez, formerly Kraft Foods, an American multinational confectionery and food company near the city of Sumy. The factory is situated thirty miles from the Russian border. It used to melt, mold, and package chocolate for consumers in Russia and Ukraine. After 2014, the company revolutionized its business model: the plant today operates twenty-four hours a day, seven days a week, and produces iconic US-brand Oreo cookies, which are exported across EU markets.

Throughout 2018, I traveled across Ukraine visiting firms from north to south, east to west. Wherever I journeyed, in Kryvyi Rih, Nikopol, Sumy, Ternopil, Odesa, Lviv, Dnipro, Kamianske, Chornobyl or Vinnytsia, I witnessed story after story of growth and plans for further development. I'm not surprised that 74 percent of American Chamber of Commerce members saw their business increase in Ukraine in 2018; three quarters are forecasting continued growth in 2019, according to our latest survey.

This expansion is a result of Ukraine's economy showing continuous, albeit modest, growth over the past three years. After the illegal annexation of Crimea and Russia's subsequent invasion, Ukraine went through a nasty fiscal plunge in 2014 and 2015. It is now rebounding. For example, Ukraine's 2018 cereal grain harvest hit a record-breaking high of 70 million tons, the highest crop ever reaped since 1991. Corn accounted for around half of that amount, due to exceptionally favorable weather conditions. The major ABCD agriculture commodity companies, Archer Daniels Midland (ADM), Bunge, Cargill and Louis Dreyfus, have stepped up their investment in Ukraine.

In addition to agriculture, our member companies grew in IT, healthcare, food and beverage, infrastructure, fast-moving consumer goods, renewable and nuclear energy sectors.

Kira Rudik, chief executive of Ring Ukraine, is one of the newly elected female CEOs to be voted on to the AmCham Ukraine Board of Directors. You may have seen the Ring TV ads on CNN. Kira established the company only two years ago with ten employees. Today, Ring employs over seven hundred research and development professionals in Ukraine. Just recently it was acquired by Amazon in a \$1 billion deal. Ring makes high-tech doorbells that record live

video of the homeowner's doorstep then wirelessly broadcasts it to their smartphones. Through this technology Amazon expects to improve its parcel delivery service.

This is just one example of a thriving IT market in Ukraine. In 2018, Ukraine's three mobile phone operators launched 4G, the fourth generation of cellular network technology, boosting mobile broadband allowing business and customers to communicate at much faster speeds.

Although optimism is widespread among companies already operating in Ukraine, new investors are still sluggish in setting up shop. Ukraine's 2018 FDI remains pitifully low at a meagre \$2 billion, under 2 percent of GDP. Investors are waiting for predictability on what will follow March's presidential vote and October's parliamentary elections. The presidential race is wide open, confirming that the country's democratic health is sound.



There were setbacks to investment in 2018 to be sure. In November, the introduction of martial law in ten regions across Ukraine resulted in some global corporate headquarters banning all business travel to Ukraine. Days after martial law was introduced, we put out an official statement reassuring companies of a "business as usual" approach. Russia's aggression against Ukraine's navy in late November did disrupt commercial vessels in the Azov Sea, however the introduction of martial law didn't impact business in other areas. Martial law is expected to be fully lifted on December 26.

Not everything is perfect in Ukraine, especially as the war in the east continues for a fifth year and the threat of further Russian aggression looms. But the companies that continue to operate and take advantage of the resilient economy and economic reforms have remarkable stories to share. Our member companies are feeling bullish about the year ahead, and so are we.

By Andy Hunder for Atlantic Council

# B2G DIALOGUE



From left to right: Andy Hunder, President, American Chamber of Commerce in Ukraine;  
Petro Poroshenko, President of Ukraine;  
Serhiy Marchenko, Deputy Head, Presidential Administration



Meeting with Petro Poroshenko, President of Ukraine

# NATIONAL INVESTMENT COUNCIL OF UKRAINE



American Chamber of Commerce in Ukraine is a member of the National Investment Council of Ukraine

# B2G DIALOGUE

Meeting with Vitali Klitschko, Kyiv City Mayor



Presentation of Publication “Guidelines for Customs Policy in Ukraine”



Igor Dankov, Co-Chair of the Chamber Customs Committee, EY Ukraine;  
 Tetyana Prokopchuk, Vice-President, American Chamber of Commerce in Ukraine;  
 Robert Zeldi, Expert of the Chamber Customs Committee, EY Ukraine



# ANNUAL CHAMBER EVENTS

## Annual Members Appreciation Reception



From left to right: Marie Yovanovitch, U.S. Ambassador to Ukraine; Andy Hunder, President, American Chamber of Commerce in Ukraine; Susan Danger, CEO, American Chamber of Commerce to the EU; Volodymyr Groysman, Prime Minister; Grzegorz Chmielarski, Director of 2019 American Chamber of Commerce Board of Directors, McDonald's Ukraine

## Annual General Membership Meeting



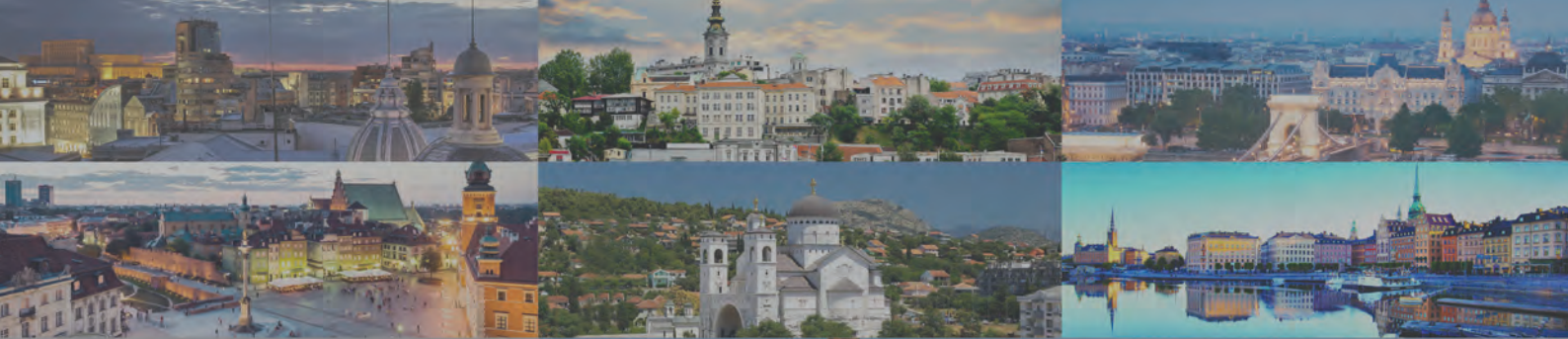
2019 American Chamber of Commerce Board of Directors with Marie Yovanovitch, U.S. Ambassador to Ukraine

# AMCHAMS IN EUROPE

AmChams in Europe Annual Conference 2018 in Washington, D.C.



AmChams in Europe delegates with President and CEO of U.S. Chamber of Commerce Thomas J. Donohue

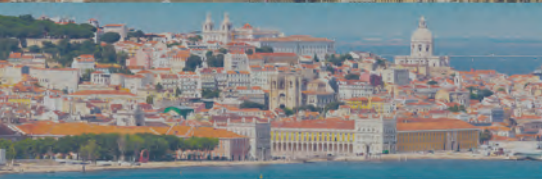


**AMCHAMS**  
IN EUROPE

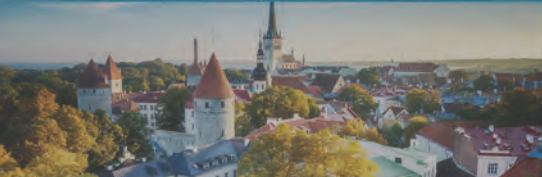
AmChams in Europe serves as the umbrella organization for AmChams throughout Europe & Eurasia



**44**  
COUNTRIES



**17,000**  
AMERICAN & EUROPEAN  
COMPANIES



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Member-at-large  
**Enida Bezhani**  
AmCham Albania



Member-at-large  
**Peter Dahlen**  
AmCham Sweden



# INTERNATIONAL OUTREACH

American Chamber of Commerce in Ukraine 25<sup>th</sup> Anniversary Gala Celebration



Meeting with the International Monetary Fund Mission



2018 American Chamber Board of Directors; International Monetary Fund Mission

# INTERNATIONAL OUTREACH

Meeting with Betsy Hafner, Deputy Assistant, United States Trade Representative for Russia and Eurasia



Discussion “What is Washington’s View on Ukraine Approaching a Year of Elections?”



From left to right: Ambassador John Herbst, Director of Eurasia Center, Atlantic Council; Melinda Haring, Editor of UkraineAlert, Atlantic Council; Andy Hunder, President, American Chamber of Commerce in Ukraine

# THANKSGIVING BLACK-TIE DINNER & AWARD CEREMONY



Presenting the Thanksgiving Choice of Business Community Award 2018 — Ukraine Investment Promotion Office for promoting Ukraine as an investment destination

# THANKSGIVING BLACK-TIE DINNER & AWARD CEREMONY



Presenting the Thanksgiving Choice of Business Community Award 2018 to National Investment Council of Ukraine for promoting Ukraine as an investment destination

# WOMEN'S EXECUTIVES LEADERSHIP DEVELOPMENT INITIATIVE (WELDI)



From left to right: Tetyana Prokopchuk, Vice-President, American Chamber of Commerce in Ukraine; Susan Fritz, Regional Mission Director to Ukraine and Belarus, USAID; Iryna Kozlova, Treasurer of 2019 American Chamber of Commerce Board of Directors, PepsiCo Ukraine; Lenna Koszarny, Chair of 2019 American Chamber of Commerce Board of Directors, Horizon Capital



Guests of WELDI 5<sup>th</sup> Anniversary. Black & White Celebration



# AMERICAN INDEPENDENCE DAY PICNIC



# GOCAMP PROGRAM

Chamber President Andy Hunder volunteers to teach at Ukraine's GoCamp initiative by GoGlobal and reflects on the importance of English-language skills in today's globalized society



# MEMBERS ABOUT AMERICAN CHAMBER OF COMMERCE IN UKRAINE



“3M is built on a foundation of uncompromising honesty from our customers, employees, partners, shareholders and communities. We cannot break that trust – to do business the right way, always and under any circumstances. The American Chamber of Commerce in Ukraine provides the expertise of sustainable development of business in Ukraine in terms of uncompromising fair game, whether working with government, customers or suppliers”.

**Gleb Khrapeychuk, General Manager, Ukraine & Georgia, Poland & Ukraine Region**

“We are proud to become a part of AmCham Ukraine ecosystem. We gain an opportunity to accelerate our relationship with the local business community and officials. Membership opens additional ways for networking with customers, and partners. In the whole, it enriches the company’s local experience and enhances our efficiency in Ukraine.”

**Iryna Volk, General Manager**



“We strongly appreciate all the work the Chamber is already doing. Therefore, to make further steps we want to take active part in the projects helping our industry to move forward and achieve new goals.”

**Nicolo Pome, General Manager Ukraine and CIS**

“We are delighted to join AmCham. It provides us with an opportunity to be a part of working groups that are deeply committed and striving to develop our industry. We also get to network and mingle with like-minded industry stalwarts which are bound to be exciting and mutually beneficial!”

**Iurii Makarenko, CEO**



GLOBAL MESSAGE SERVICES



“It’s great honor to be a member of American Chamber of Commerce community because it brings prospects to business development in Ukraine and establishes transparent business opportunities for sustainable growth.”

**Mark Sawchuk, Country Manager**

“We are glad to be the part of the AmCham society, because the platform offers good opportunity for the effective communications with the colleagues are doing the business in Ukraine and for the dialogue with the Ukrainian officials. Such kind of the contacts allow us to adjust our sales strategy and to continue our further profitable growth in Ukraine.”

**Vitalii Bulda, General Manager**



**BOSCH**  
Винайдено для життя



«The reason for joining the Chamber is the possibility to be in the heat of the discussion with other members of the Chamber on the topics that are vitally important for the energy companies operating in Ukraine. Chamber’s extensive communication platform allows us to be heard on all levels – among business and government».

**Valentyna Beliakova, Director**

# POLICY PLATFORM

## AEROSPACE & TECHNOLOGY COMMITTEE



**Andrew Bain**  
Atlantic Group



**Olga Belyakova**  
CMS Cameron McKenna  
Nabarro Olswang

Mission: To improve the business environment to further develop a sustainable and well-regulated Aerospace sector in Ukraine.



**Valeriy Stasyuk**  
Paton Turbine Technologies

## AGRICULTURAL COMMITTEE



**Dmitry Gorshunov**  
Suntrade S.E. / Bunge Ukraine



**Vadim Miroshnichenko**  
Cargill AT

Mission: To support and promote development for a market-based Agricultural sector as the core for the overall development of Ukraine's economy.



**Vladimir Osadchuk**  
Noble Resources Ukraine

## WORKING GROUP ON AGRICULTURAL MACHINERY ISSUES



**Peter Sachse**  
John Deere Ukraine

## BANKING & FINANCIAL SERVICES COMMITTEE



**Taras Kyrychenko**  
PRAVEX-BANK, PJSCCB



**Ihor Olekhov**  
Baker McKenzie

Mission: To further develop Ukraine's banking system and to promote high banking standards, as well as support and develop initiatives for establishing a local banking environment that follows the best international practices.



**Anna Parkhomenko**  
KPMG Ukraine

## CUSTOMS COMMITTEE



**Igor Dankov**  
EY



**Dmytro Fedechko**  
Louis Dreyfus Company Ukraine

Mission: To contribute to the development of the customs legislation that would be simple, modern and adaptable.



**Oleksandr Prokhorovych**  
METRO Cash & Carry Ukraine

## WORKING GROUP ON NON-TARIFF REGULATION



**Anton Melnyk**  
EY

## WORKING GROUP ON REFORMING LIABILITY FOR CUSTOMS OFFENCES



**Ivan Shynkarenko**  
KM Partners

## WORKING GROUP ON INTERNATIONAL TRADE



**Anzhela Makhinova**  
Sayenko Kharenko

## ENERGY COMMITTEE



**Yuliya Borzhemska**  
DTEK Oil & Gas



**Olga Mamedova**  
Energy Resources of Ukraine

Mission: To promote the further development and modernization of Ukraine's energy sector by attracting investment, in support of the vision of a more energy self-sufficient Ukraine.



**Vitaliy Radchenko**  
CMS Cameron McKenna  
Nabarro Olswang

## WORKING GROUP ON ELECTRICITY ISSUES



**Valentyna Beliakova**  
TIU Canada Ltd.

## FOOD & BEVERAGE COMMITTEE



**Alexander Babaskin**  
Coca-Cola Beverages Ukraine Limited



**Sergey Movchan**  
DANONE

Mission: To ensure sustainable development of market-based Food & Beverage industry as a reliable and efficient supplier of quality products both for domestic and international consumers.



**Yevgeniya Piddubna**  
Carlsberg Ukraine

# POLICY PLATFORM

## WORKING GROUP ON FOOD SAFETY & LABELING REQUIREMENTS



**Volodymyr Martynchuk**  
Lactalis-Ukraine

## WORKING GROUP ON POST-CONSUMER WASTE RECYCLING



**Anna Tarantsova**  
Tetra Pak Ukraine

## WORKING GROUP ON EXTERNAL TRADE ISSUES



**Olena Omelchenko**  
Ilyashev & Partners Law Firm

## WORKING GROUP ON STREAMLINING ALCOHOL PRODUCTION & CIRCULATION ISSUES



**Yevgeniya Piddubna**  
Carlsberg Ukraine

## WORKING GROUP ON PRICE CONTROLS & ANTIMONOPOLY LEGISLATION



**Lana Sinichkina**  
Arzinger Law Office

## HEALTHCARE COMMITTEE



**Maryna Buchma**  
TEVA UKRAINE



**Borys Danevych**  
Danevych. Law

Mission: To establish a competitive landscape for the development of the Healthcare sector by contributing to forming a transparent and efficient regulatory system.



**Vitaliy Gordienko**  
AbbVie Biopharmaceuticals  
GmbH

**WORKING GROUP ON HEALTHCARE HARDWARE & MEDICAL DEVICES MANUFACTURERS**

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**WORKING GROUP ON HEALTH & MEDICAL SERVICES PROVIDERS**



**Ruslan Sovershennyi**  
Cratia

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**WORKING GROUP ON HEALTHCARE SUPPLY CHAIN PROVIDERS**



**Igor Mozolevych**  
Delta Medical

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**HEALTHCARE MARKETING HUB**



**Yuliya Zvigintseva**  
IMS Health Technology Solutions  
Ukraine

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**HUMAN RESOURCES COMMITTEE**

Mission: To promote the professional development of Members through exposure to new knowledge, skills, and information.



**Marina Ivantsova**  
Carlsberg Ukraine



**Olga Levchenko**  
Procter & Gamble Ukraine



**Olga Melnychenko**  
PwC

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**INFORMATION TECHNOLOGIES COMMITTEE**

Mission: To develop a sustainable and well-regulated Information Technology sector in Ukraine by improving its business environment.



**Valeriy Fischuk**  
CISCO



**Olga Romanenko**  
PwC



**Oleg Yakymchuk**  
Google LLC

# POLICY PLATFORM

## WORKING GROUP ON CYBERSECURITY ISSUES



**Igor Kotsiuba**  
Asters

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## WORKING GROUP ON PERSONAL DATA PROTECTION

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### INFRASTRUCTURE COMMITTEE



**Oleg Bigdan**  
Suntrade S.E. / Bunge Ukraine



**Oleksiy Feliv**  
INTEGRITES

Mission: To define transparent and beneficial mechanisms of interaction and cooperation for the participants of economic activity in Infrastructure sphere and for the state in general.



**Serhiy Vovk**  
Centre for Transport Strategies

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### INTELLECTUAL PROPERTY RIGHTS COMMITTEE



**Ruslan Drobyazko**  
Baker McKenzie



**Alexander Kozyriev**  
Bayer HealthCare Pharmaceuticals



**Kateryna Oliinyk**  
Arzinger

Mission: To contribute to development of comprehensive legal and institutional frameworks in IPR sphere.

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### LEGAL COMMITTEE



**Oleksandra Kostrytsia**  
PwC



**Vitaliy Odzhikovskyy**  
Sayenko Kharenko



**Dmytro Trut**  
Arzinger

Mission: To address systemic legal issues through the proactive development of legislative proposals and the improvement of enforcement practices, and by raising awareness of the best practices among judges and other stakeholders.

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### ANTI-CORRUPTION WORKING GROUP



**Igor Svitlyk**  
Dentons

### ANTIMONOPOLY WORKING GROUP



**Eduard Tregubov**  
Salkom Law Firm



## COMPLIANCE CLUB



**Ario Dehghani**  
Redcliffe Partners



**Tetiana Kyryk**  
Kyivstar

## MOBILE TELECOM COMMITTEE

Mission: To further develop a sustainable and well-regulated Mobile Telecom sector in Ukraine.



**Olga Deynega**  
Vodafone



**Oleksandr Kogut**  
Kyivstar



**Andriy Kryl**  
lifecell

## SEEDS COMMITTEE

Mission: To establish an efficient and predictable regulatory system to ensure the clear and transparent admission of novel crops and agrochemicals to the agricultural market.



**Vitaliy Fedchuk**  
Monsanto Ukraine



**Nataliia Gusieva**  
Bayer

## WORKING GROUP ON PLANT REGISTRATION

### TAX COMMITTEE

Mission: To promote a Ukrainian taxation system that is more predictable, equitable, and effective for both the general facilitation of business and the development of Ukraine's economy.



**Victoria Chornovol**  
Deloitte & Touche USC



**Alexander Shemiattkin**  
KM Partners



**Slava Vlasov**  
PwC

## WORKING GROUP ON INTERNATIONAL TAXATION & EU HARMONIZATION



**Vadim Medvedev**  
AVELLUM

# POLICY PLATFORM

## **WORKING GROUP ON CONSUMER GOODS (PERSONAL & HOUSEHOLD CARE)**



**Tetyana Denisova**  
AVON COSMETICS UKRAINE

Mission: To provide necessary support and expertise to the current players of FMCG market as well as to attract new investors through contribution to establishing a favorable regulatory environment for consumer product businesses.

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## **HOSPITALITY & TOURISM WORKING GROUP**



**Maryna Rymarenko**  
DEOL Partners

Mission: To provide necessary support for development of Tourism industry through implementation of the best international practices and introduction of stimulation mechanisms for innovative investment activity in this sector.

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## **MEDIA & COMMUNICATION**



**Tatiana Popova**  
Media Expert

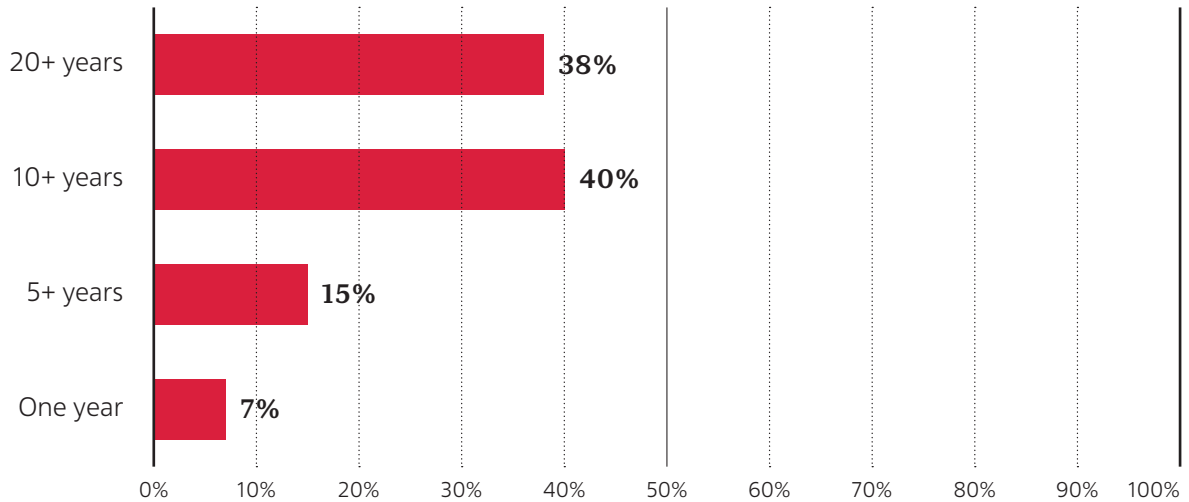
Mission: To provide a platform not only to discuss existing issues within the industry, but also to leverage the combined experience and presence of Chamber Member Companies with marketing and media interests.

# DOING BUSINESS IN UKRAINE

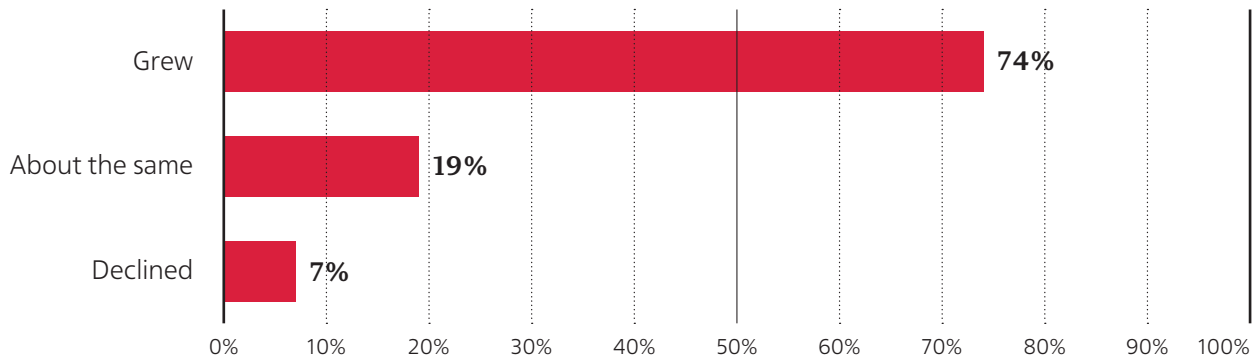


One of the main reasons AmCham Ukraine has been operating in Ukraine for more than quarter of a century is to make our Members' businesses grow. During our **26<sup>th</sup> Annual General Membership Meeting** on December 6, 2018 we conducted a real-time voting and received results.

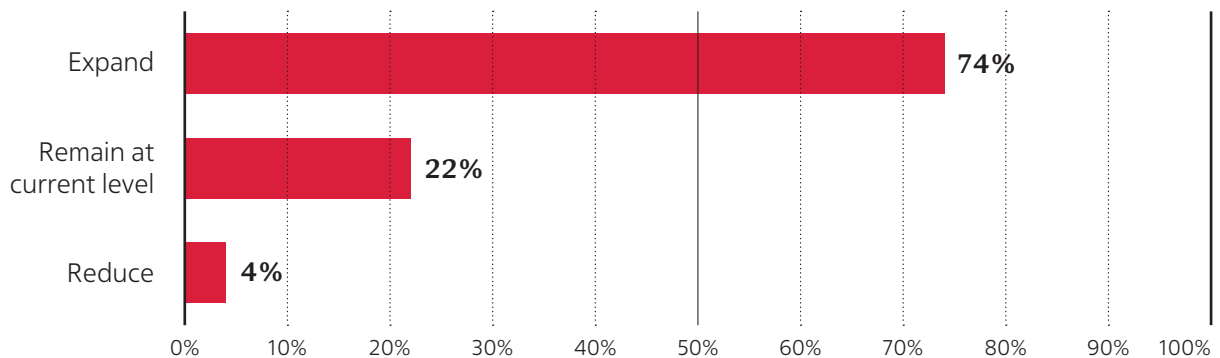
## HOW LONG HAS YOUR COMPANY BEEN OPERATING IN UKRAINE?



## YOUR BUSINESS IN UKRAINE IN 2018...



## YOUR BUSINESS PLANS FOR 2019 IN UKRAINE...



# AGRICULTURAL BUSINESS SECTOR OVERVIEW

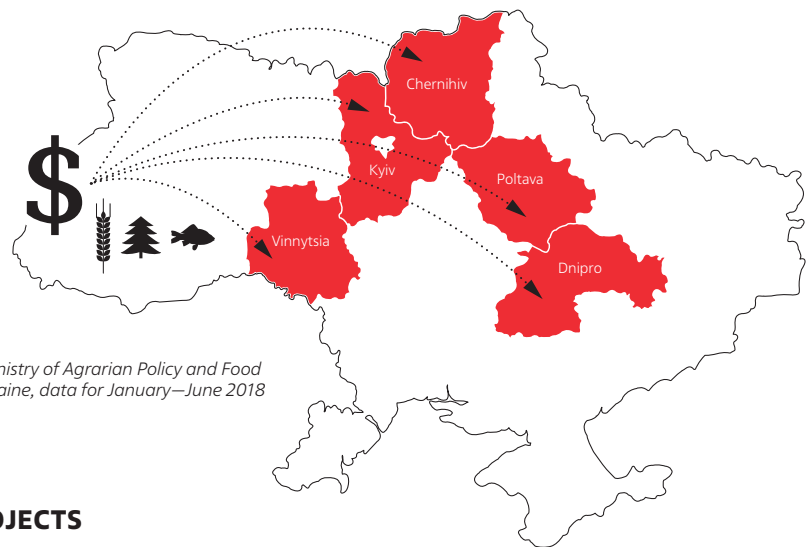
## CAPITAL INVESTMENT GROWTH

**+9.8%** → **UAH 26.9 bln**

In January–June 2018, capital investment in agriculture, forestry and fisheries grew by 9.8% compared to the same period in 2017, and total investments amounted to UAH 26.9 billion

## TOP-5 REGIONS BY THE VOLUME OF INVESTMENT IN AGRICULTURE, FORESTRY AND FISHERIES

1. Kyiv Region
2. Vinnytsia Region
3. Dnipropetrovsk Region
4. Chernihiv Region
5. Poltava Region

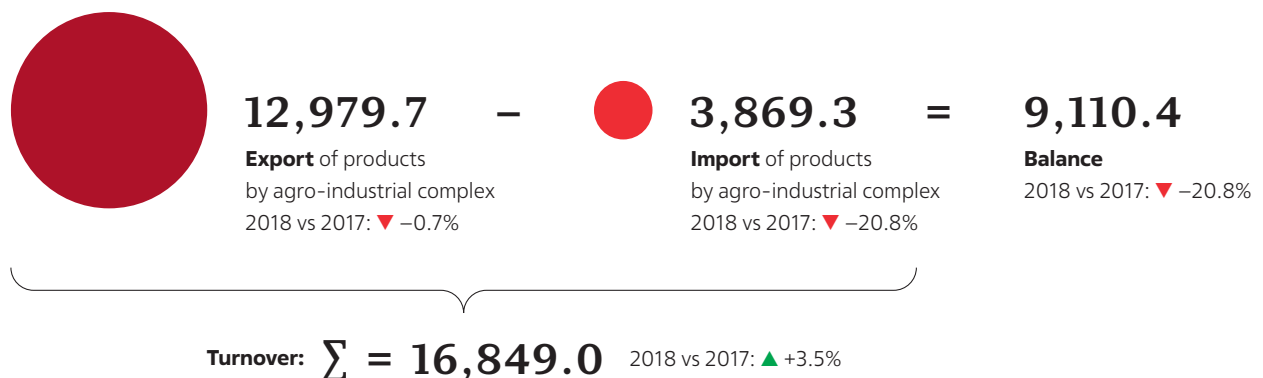


## TOP-3 M&A AND INVESTMENT PROJECTS

1. Acquisition of Mriya Agro Holding Company by SALIC
2. Opening of the Bayer's seed plant in Zhytomyr Region
3. Acquisition of a 51% stake in Spectr-Agro by Sumitomo

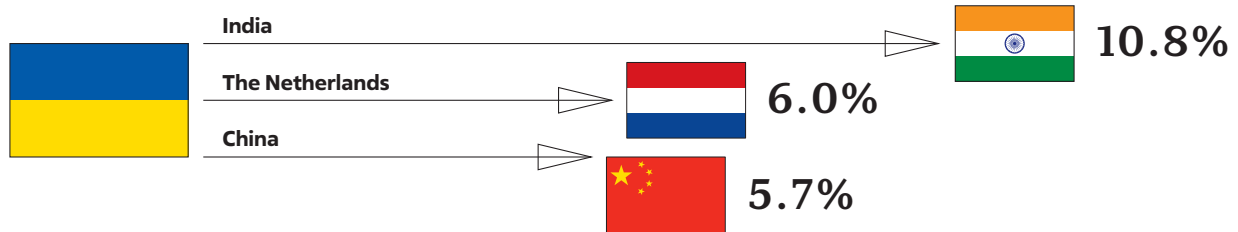
- ◇ Agricultural output has increased in **21 regions**
- ◇ **Ukragroleasing** has been offered for privatization

## FOREIGN TRADE, USD MLN



Source: Ministry of Agrarian Policy and Food of Ukraine, data for January–September 2018

### TOP-3 BY GEOGRAPHIC STRUCTURE OF FOREIGN TRADE



Source: Ministry of Agrarian Policy and Food of Ukraine, data for January–September 2018

### TOP-5 COMPANIES BY THE SIZE OF THEIR LAND BANK

1. Ukrlandfarming
2. Kernel
3. Agroprosperis
4. MHP
5. Astarta

Source: latifundist.com

### KEY LEGISLATIVE DEVELOPMENTS

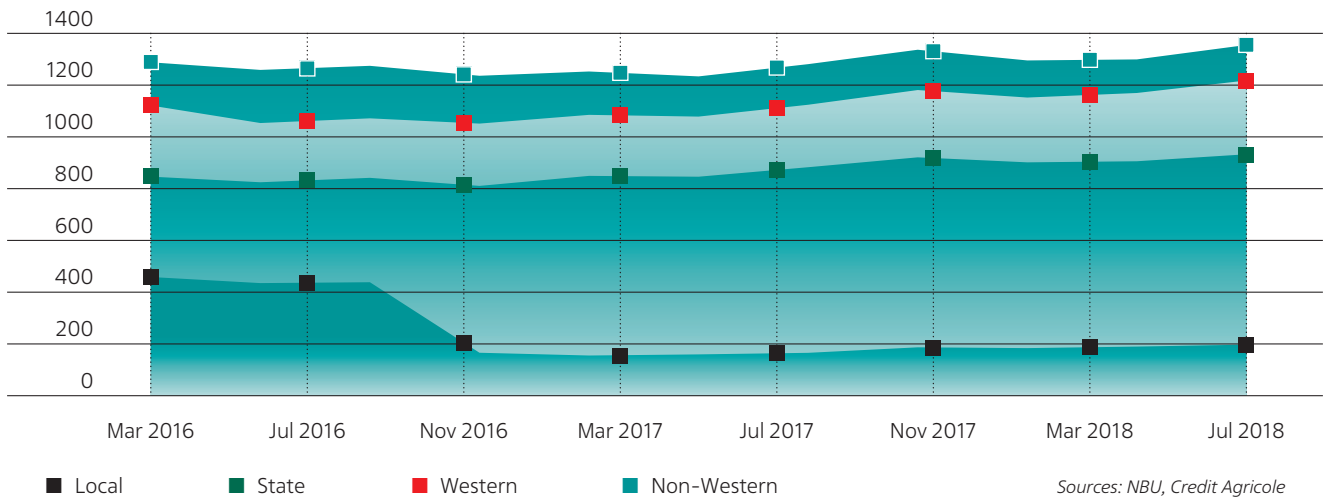
- ◇ Introduction of “land decentralization” providing for the transfer of agricultural land from state ownership into the ownership of amalgamated territorial communities
- ◇ Creation of preconditions for more efficient use of agricultural land: any leaseholder having in its possession 75% of the land mass will have the right to lease (sublease) adjacent land plots that are in the use of other persons
- ◇ A tax environment has been formed to stimulate the creation and operation of family farms through their inclusion in the simplified taxation, accounting, and reporting system
- ◇ Expansion of the export geography of certain types of meat and dairy products, in particular, to Albania, Ghana, Hong Kong, Macedonia, Morocco, the United Arab Emirates, Serbia, Tajikistan, Turkey and Montenegro
- ◇ Reinstatement of VAT payment and compensation when exporting soybeans and rape
- ◇ The European Court of Human Rights has recognized that moratorium on the sale of land violates human rights

### KEY CHALLENGES

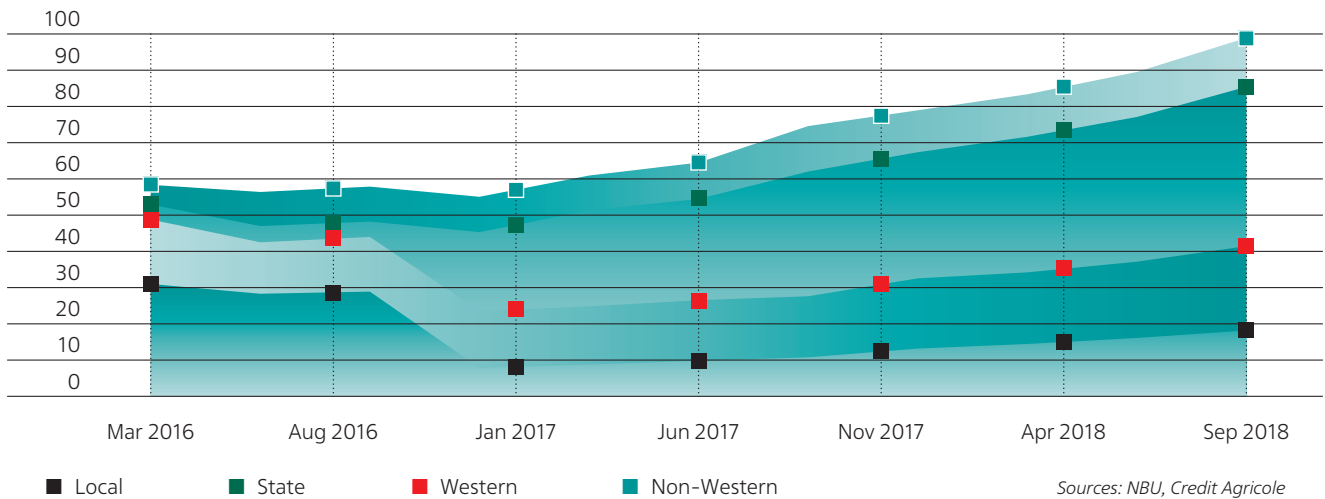
- ◇ The need to return to the automatic accrual of subsidies to agricultural producers
- ◇ The absence of the possibility for small and medium-sized businesses to recover VAT when exporting oilseeds in practice
- ◇ The need to adopt a draft law *On National Geospatial Data Infrastructure* which will help improve land management quality
- ◇ High prices and low competition in the nitrogen fertilizer market
- ◇ The lack of a developed infrastructure which would provide an increased reliability of export, the need to introduce “private traction”

# BANKING SECTOR OVERVIEW

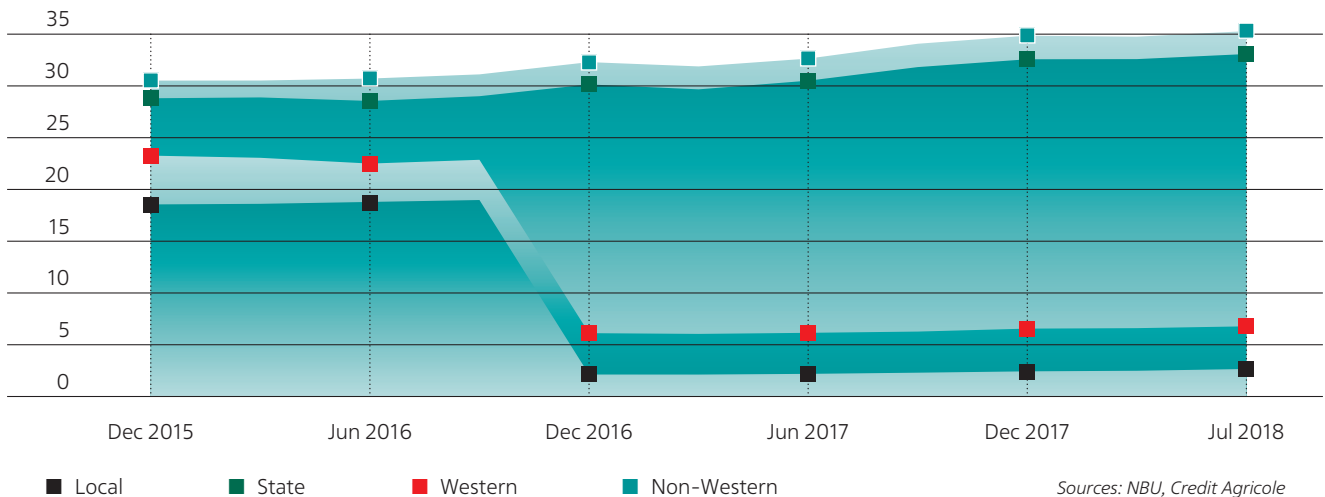
**BANKS ASSETS DYNAMIC BY GROUPS, UAH BN**



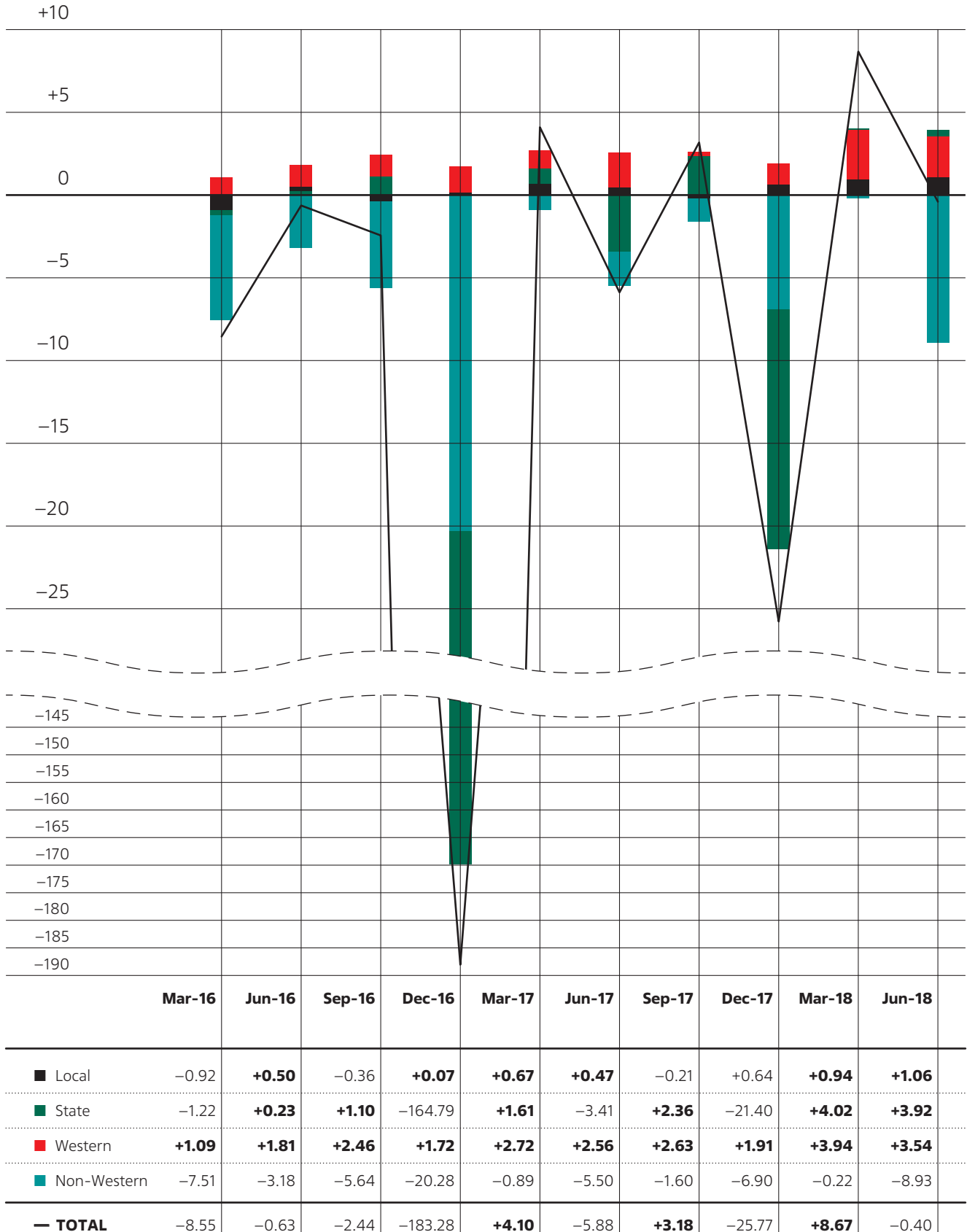
**UAH RETAIL LOANS BY GROUPS OF BANKS, UAH BN**



**ACTIVE CARDS, M ITEMS**



### NET PROFIT BY GROUPS OF BANKS, QUARTERLY, UAH BN



## TOP 20 BY ASSETS, SEP 2018, UAH BN

■ Sep 2017

■ Sep 2018

	Sep 2017	Δ	Sep 2018
1. Privatbank	256.28	Δ +17.11	273.00
2. Oschadbank	222.15	▽ -8.17	214.00
3. Ukreximbank	166.85	▽ -2.89	164.00
4. Ukgazbank	71.08	Δ +12.64	84.00
5. Raiffeisen bank Aval	65.10	Δ +13.53	79.00
6. Alfabank	41.25	Δ +15.64	57.00
7. PUMB	44.27	Δ +7.82	52.00
8. UkrSibbank	42.98	Δ +5.22	48.00
9. Credit Agricole	30.16	Δ +5.38	36.00
10. Sberbank	40.69	▽ -7.79	33.00
11. OTP Bank	26.84	Δ +5.37	32.21
12. Bank Pivdenny	21.94	Δ +3.06	25.00
13. Citi Bank	19.90	Δ +2.95	22.85
14. Procreditbank	14.67	Δ +5.87	20.54
15. Ukrsotsbank	31.89	▽ -11.84	20.05
16. Prominvestbank	22.43	▽ -4.43	18.00
17. Kredobank	12.99	Δ +3.40	16.39
18. Taskombank	12.20	Δ +3.86	16.06
19. ING Bank	9.95	Δ +0.97	10.93
20. Megabank	8.34	Δ +1.43	9.77
Other	118.75	Δ +4.90	123.65

**MAIN CHALLENGES/ PROBLEMS OF THE SECTOR**

- ◇ The recent crisis and a sharp decline in the number of banks continue to affect the current situation in the banking system, including a very slow loan growth
- ◇ The share of non-performing loans exceeds 50%, but most of them are with state and non-Western banks
- ◇ The economic crisis and slow economic recovery reduce the range of banks' potential clients
- ◇ High share of FX assets bears the risk of their depreciation in case of rapid devaluation of the national currency
- ◇ The tight monetary policy of the NBU reduces the prospects of declining interest rates in the market in the near future
- ◇ The potential volume of PI lending is limited by weak consumer demand

**PROSPECTS, OPPORTUNITIES, INNOVATIONS IN THE SECTOR**

- ◇ The growth of the banks' loan portfolios in the short term will be mostly due to consumer lending
- ◇ The banks will continue to focus on the IT and Internet-banking development. Besides, state banks will continue to optimize their branch networks
- ◇ In the near future, the decrease in the share of the state-owned banks is not expected, although the state may prepare some of its banks for sale
- ◇ Although the main phase of the banking system clean-up is over, further reduction in the number of banks is possible (mostly the smaller banks) due to the withdrawal of inefficient banks from the market
- ◇ The segment of Western banks will remain the most profitable and will maintain the largest development dynamics due to higher client confidence and the use of modern technologies





# A WHOLE BANK JUST FOR YOU



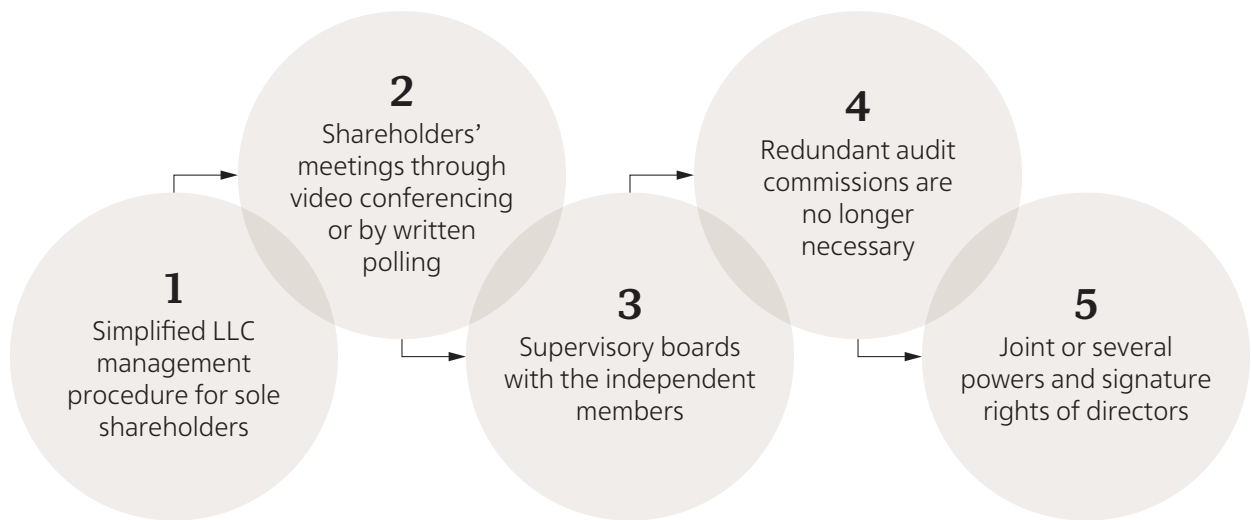
NBU license No.99 od. 12.10.2011

# CORPORATE LAW REFORM 2018

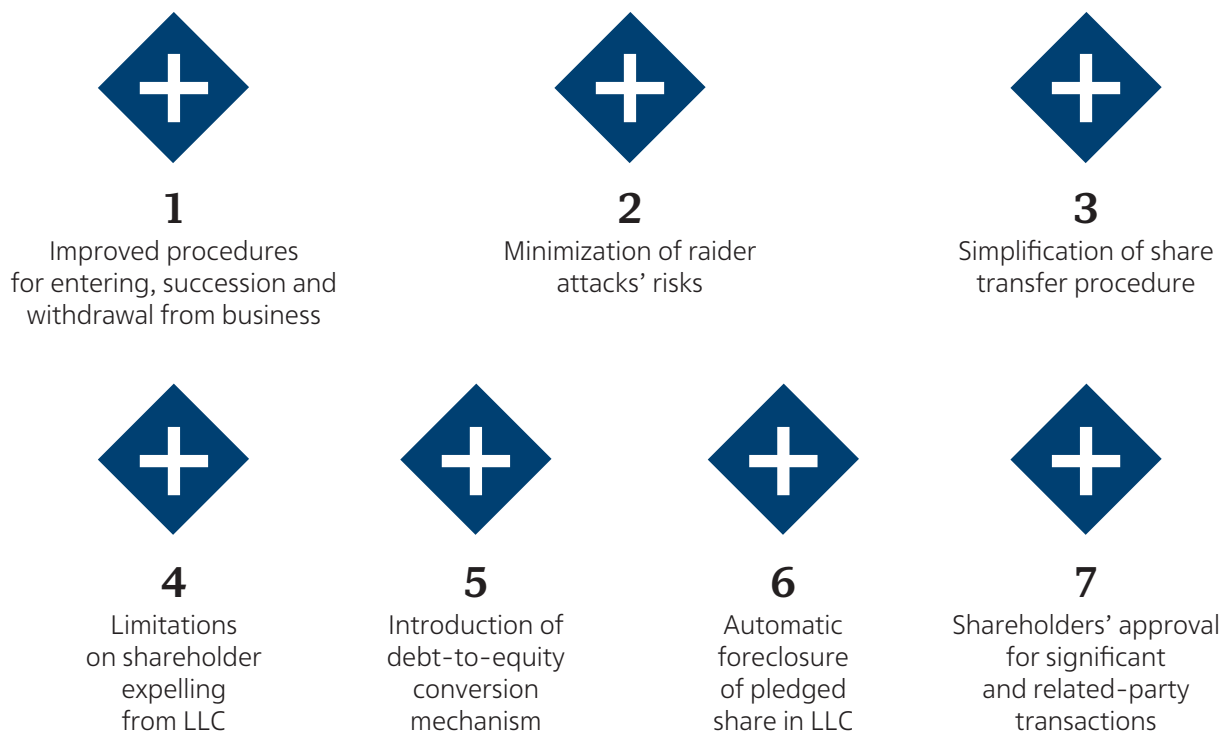
## FURTHER PROGRESS OF THE REFORM

The year of 2018 has been marked with further progress of the corporate law reformation in Ukraine. The Law on Corporate (Shareholders') Agreements entered into force on February 18, 2018, finally opening the possibility for shareholders of Ukrainian joint-stock companies (JSCs) and limited liability companies (LLCs) to regulate their relations in line with the common world practice to execute the shareholders' agreements. Eventually, on June 17, 2018, the new Law "On Limited Liability and Additional Liability Companies", entered into force and started a new epoch in the regulation of LLCs, the largest group of legal entities in Ukraine. These two laws along with other important legislative changes approached the corporate legislation of Ukraine to the European standards.

## CORPORATE GOVERNANCE IMPROVEMENTS



## INCREASED SHAREHOLDERS' BENEFITS



## SHAREHOLDERS AGREEMENTS ALLOW TO:

**1** ————— ▷ Determine rules for exercising shareholders' voting rights

**2** ————— ▷ Introduce transfer instruments customary in other jurisdictions: call option, put option, drag along, tag along

**3** ————— ▷ Agree on sale or purchase of shares at the pre-agreed purchase price or conditions

**4** ————— ▷ Ban the sale of shares

### MAIN PROBLEMS/ DIFFICULTIES OF THE FIELD

- ◇ Still insufficiently defined procedure of debt-to-equity conversion in LLCs
- ◇ Lack of proper awareness regarding material and related-party requirement of transactions approval
- ◇ Difficulties with the new procedures for implementation of pre-emptive rights, withdrawal of participants from LLCs, creditors' protection in the course of spin-off or termination of LLCs
- ◇ Limited access to financial documents for interested parties
- ◇ Practical difficulties with foreclosure of pledges over shares in LLCs (e.g. valuation, auction sales)

### PROSPECTS, POSSIBILITIES, INNOVATIONS IN THE FIELD

- ◇ Promotion of transparent and accountable business in Ukraine
- ◇ Contribution to development of small and mid-size businesses
- ◇ Improvement of corporate governance standards, corporate governance flexibility
- ◇ Increased shareholders' protection, reduced opportunities for raider attacks
- ◇ Higher protection of creditors' rights
- ◇ Structuring of M&A transactions in Ukraine without foreign holding structures
- ◇ Prevention of capital outflow from Ukraine
- ◇ Simplified resolution of internal corporate conflicts
- ◇ Improved liquidity of shares
- ◇ More possibilities for conversion of JSCs into LLCs



*“Business in Ukraine highly appraised the progress of corporate reform in 2018 and started to benefit from application of new progressive and convenient corporate rules. Further important changes are expected in corporate laws, including changes to the rules applicable to representative offices of foreign legal entities in Ukraine, improvement of corporate governance of financial institutions (banks in particular) and state-owned companies, introduction of further raider-protection mechanisms etc.”*

**Maria Orlyk, Partner, CMS Reich-Rohrwig Hainz**

# DEFENSE AND AEROSPACE INDUSTRY OVERVIEW

## STATE CONCERN “UKROBORONPROM”

State concern “**Ukroboronprom**” is the largest state defense holding group in Ukraine, comprising over 120 companies operating in five major industries, and is ranked 81<sup>st</sup> in SIPRI’s “Top 100 arms-producing and military services companies in the world”

## AVIATION CLUSTER OF UKROBORONPROM

# 30+

companies engaged in aircraft engineering and maintenance

## STATE SPACE AGENCY OF UKRAINE

# 8

manufacturing enterprises

# 5

design bureaus

# 11

companies of other types, including **SE “Yuzhmash”**, one of the world leaders in the serial production of rockets

## AIRCRAFT MANUFACTURING

Ukraine has the full cycle of aircraft manufacturing — from design to serial production and complex after-sale support

**SE “Antonov”** is the producer of An-225 “Mriya” and An-124 “Ruslan” aircraft, which are one of the biggest aircraft in the world

# #1

**An-225 “Mriya”**  
biggest aircraft  
in the world



# #6

**An-124 “Ruslan”**  
biggest aircraft  
in the world

# 100+

companies in private sector

# 200+

R&D, engineering centers and production companies in the industry, including R&D centers of **Boeing, Firefly Aerospace, Skyrora**

# 100,000+










engineers, specialists and workers employed in the industry

### SCIENCE AND TECHNOLOGY GLOBAL CONTRIBUTION (OUT OF 163 COUNTRIES)

Country		Place in the world
<b>UKRAINE</b>		<b>1</b>
Czech Republic		2
Hungary		3
Denmark		4
United Kingdom		5
Austria		6
Finland		7
Netherlands		8
Belgium		9
Slovenia		10

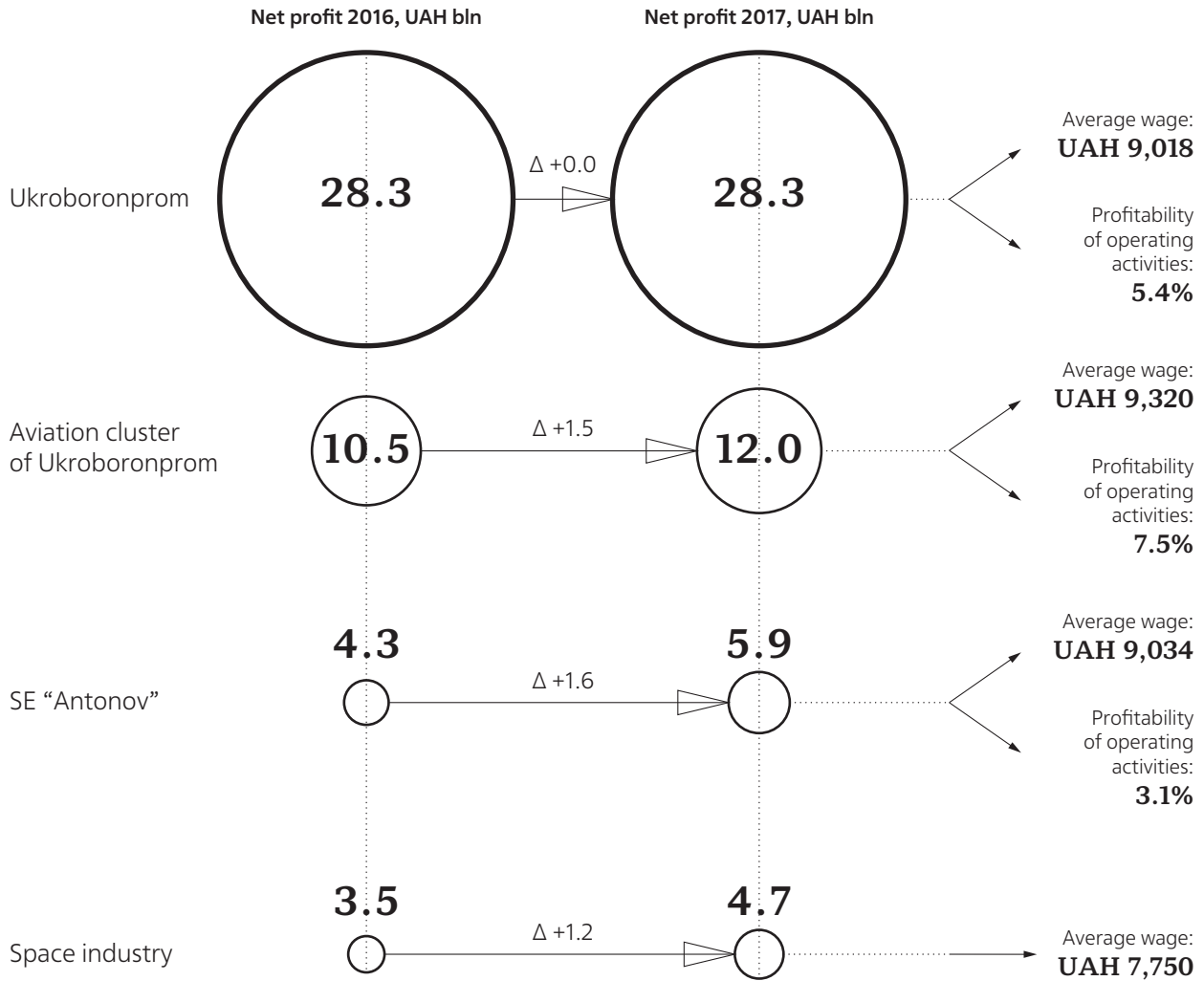
Source: *The Good Country Index*

### EUROPEAN STRONGEST ARMIES

Country		Place in the world
France		1
UK		2
Germany		3
Italy		4
Spain		5
Poland		6
Greece		7
<b>UKRAINE</b>		<b>8</b>
Czech Republic		9
Sweden		10

Source: *Global Firepower – 2018 European Powers  
Ranked by Military Strength Ranking*

## FINANCIALS



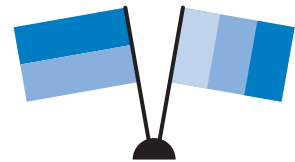
Source: State Concern "Ukroboronprom", State Space Agency of Ukraine, Interfax



**150+**



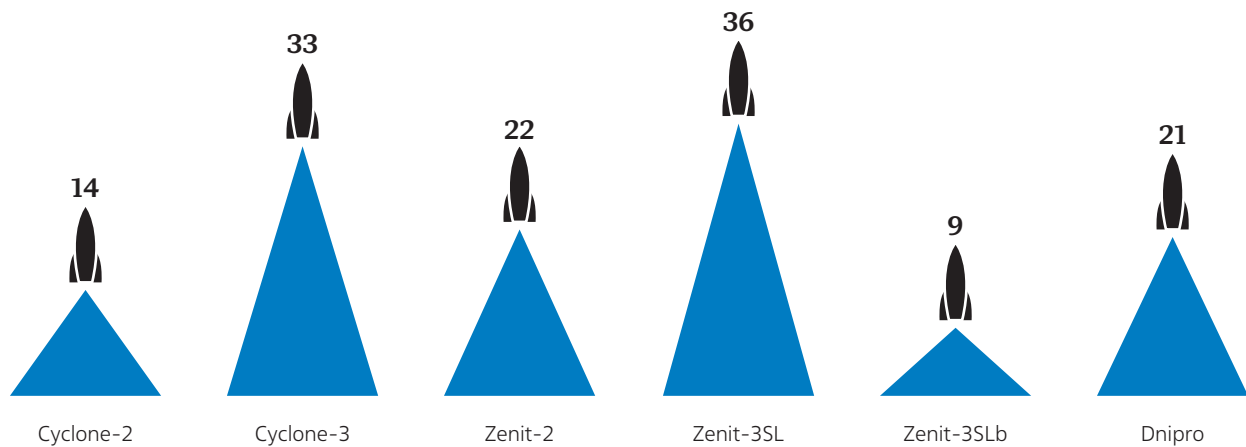
**200+**



**>10**

Over the years of Ukrainian independence, over 150 vehicle launches have been completed and more than 200 spacecraft units have been put into orbit under contracts with more than ten countries. Nine launches were performed in 2017–2018.

## NUMBER OF LAUNCHES OF UKRAINIAN VEHICLES



Source: State Space Agency of Ukraine

### MAJOR PROBLEMS/DIFFICULTIES IN THE SECTOR

- ◇ Non-effective management of state-owned enterprises (SOEs). State ownership is fragmented and scattered among numerous stakeholders (MOD, MIA etc.) with frequent overlap and conflict of interests
  - ◇ Lack of transparency and excessive limitations of access to data in the industry
  - ◇ No effective mechanisms for cooperation between SOEs and private companies
  - ◇ No clear strategy for the development of the sector in the long run
  - ◇ Lack of political will and senior leadership issues among key decision-makers in the industry
- A number of reforms have been announced but not implemented

### PROSPECTS, POSSIBILITIES, INNOVATIONS IN THE SECTOR

- ◇ Privatization of non-strategic SOEs
- ◇ Establishing supervisory councils with independent directors in SOEs
- ◇ Reforming the strategic control system, strengthening the end-user control
- ◇ State defense procurement reform
- ◇ Amending PPP and JV legislation, as well as the IP protection legislation regarding military and dual-use goods
- ◇ Reform of the system of protection of state secrets and other restricted information based on EU and NATO practice
- ◇ Implementation of NATO standards
- ◇ Growth of international cooperation and trade



*“Ukraine possesses technical expertise, a qualified workforce, a supply chain and a long history in the global space race to back its offer. Over the last few years, the Ukrainian defense industry has demonstrated that it is capable of developing fast. Primary goals are connecting the industry with the 21<sup>st</sup> century processes already developed and implemented in the Western/NATO countries, creating conditions to bring investment into the sector and implement the announced reforms.”*

**Anastasiya Bolkhovitinova,**  
**Legal Director at DLA Piper Ukraine, PhD**

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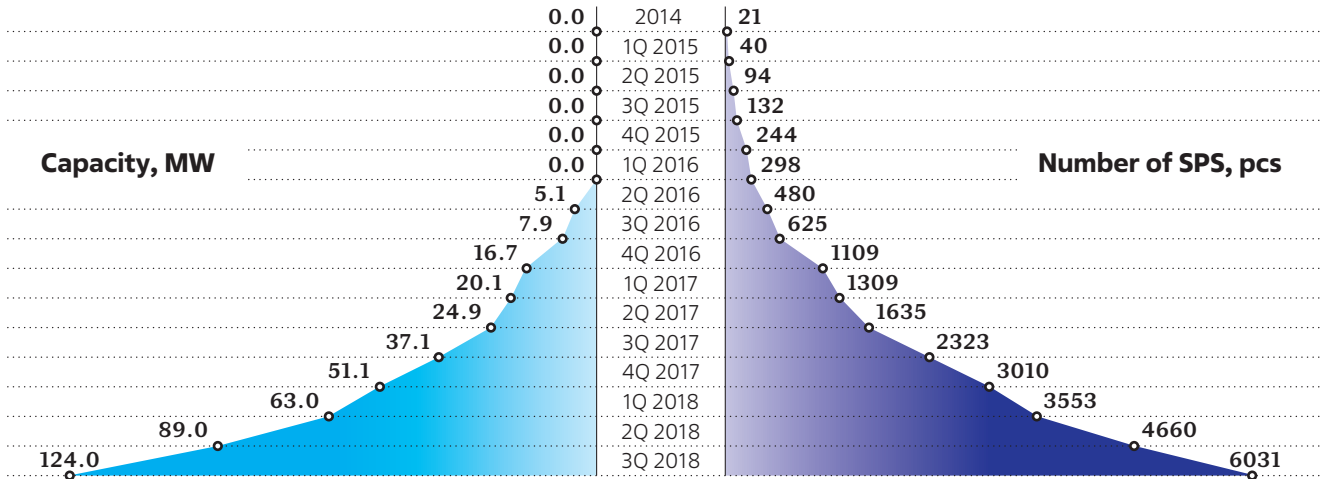
Tylofen Hot R.C. Ministry of Health No. UA/10897/01/01. Advertising of medicines. Before using, be sure to read the instructions and consult your doctor. Complete information, including possible adverse reactions, is contained in the instructions for medical use. For more information, please contact NOBEL, 2A AVTOZAVODSKA ST, FL 8, KYIV 04074, UKRAINE. Tel.: +380-44-586-2064, [www.nobel.com.ua](http://www.nobel.com.ua)

SEMINAR BELARUS

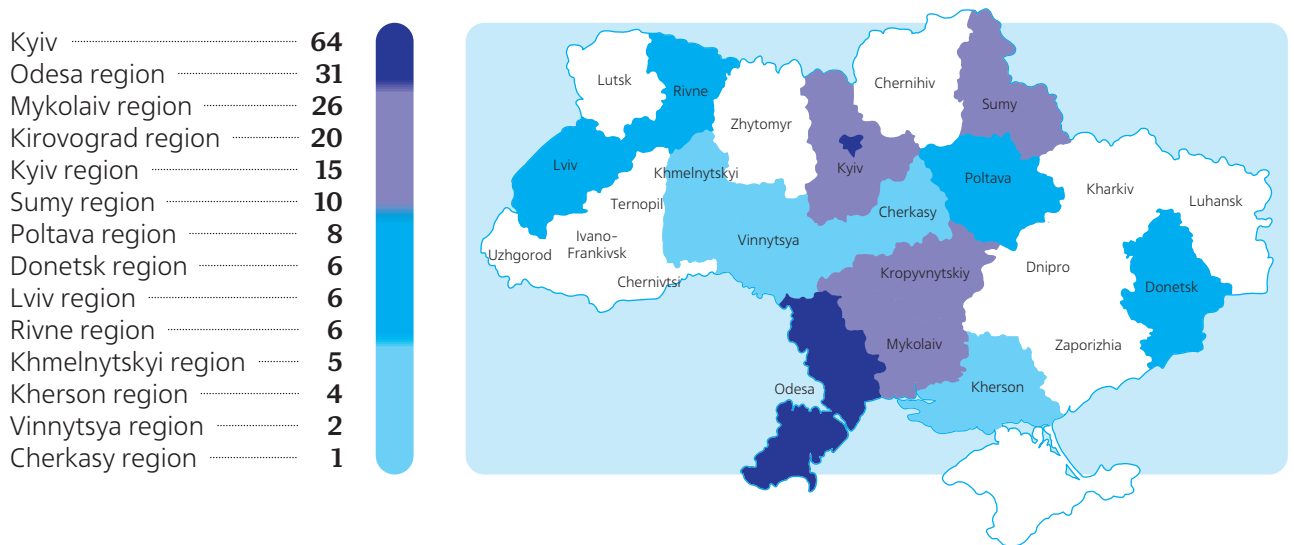
# ENERGY EFFICIENCY OF UKRAINE

## MAIN INDUSTRY QUANTITATIVE INDICES 2017–2018

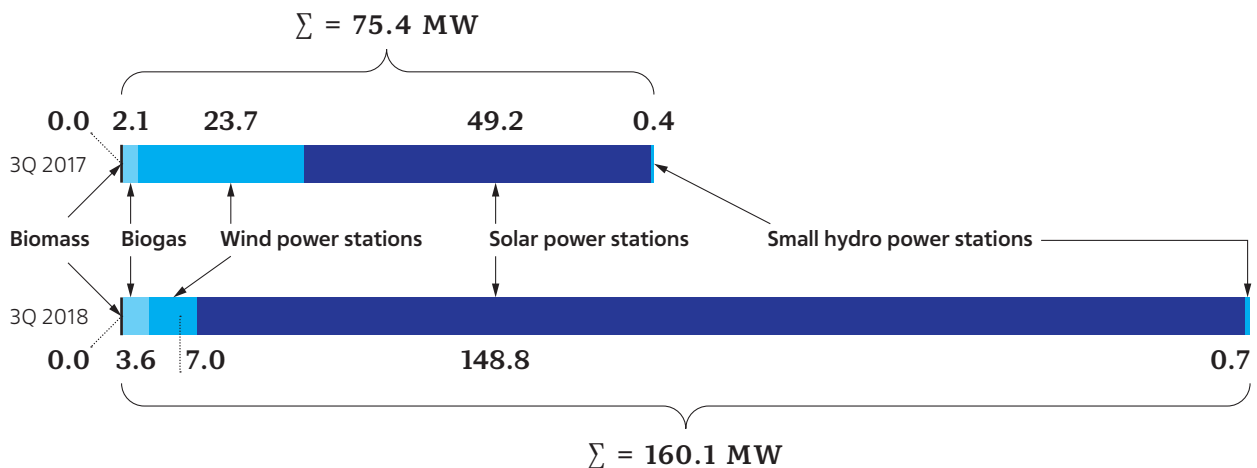
### NUMBER AND GENERAL CAPACITIES OF SOLAR POWER STATION PLANTS WORKING UNDER THE “GREEN” TARIFF\*

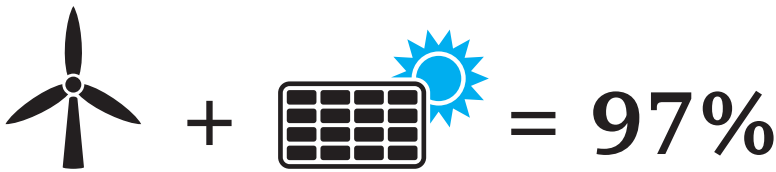


### DISTRIBUTION OF THE NUMBER OF ESCO-CONTRACTS BY REGIONS\*



### THE DYNAMICS OF THE COMMISSIONING OF SOLAR POWER STATION OBJECTS AS OF SEPTEMBER 2018\*\*, MW





**The objects of wind power stations and solar power stations make up 97% of the installed capacities**

\* According to State Agency on Energy Efficiency and Energy Saving of Ukraine

\*\* According to National energy and Utilities Regulatory Commission of Ukraine

### MAIN CHALLENGES/ PROBLEMS OF THE FIELD

- ◇ In recent years, the use of renewable energy sources has become more widespread in Ukraine, but today, Ukraine's "green" energy is still in the process of development
- ◇ Legislative: legislation gaps and lack of a prepared and adopted package of legislative acts do not allow the new electricity market to be fully operational since July 2019, and legislative initiatives for auctions to establish a "green" tariff have no consistency in the approaches to their implementation
- ◇ The RES market is in a state of uncertainty, as a result of which there is still lack of public confidence in the effectiveness of tools for stimulating and attracting investment

### PROSPECTS, OPPORTUNITIES, INNOVATIONS IN THE FIELD

- ◇ Achieving the energy-related goals of the 2030 Agenda for Sustainable Development will require not just announcements about commitments, but rather deep and transformative action. The development of renewable energy sources (RES) can substantially strengthen the energy security of the state. Consequently, the "Energy Strategy of Ukraine until 2035", approved by the Cabinet of Ministers of Ukraine on August 18, 2017, aims at increasing the share of RES in the energy balance and electric balance by more than 25% until 2035
- ◇ The tendency for a rapid increase of the growth rates of connecting the renewable energy facilities to the electric networks of the UES of Ukraine is stipulated in Ukraine:
  - The development of the market of RES and relevant world trends
  - The presence of support for new RES objects through the green tariff

In addition, the Transition of Ukraine to Renewable Energy by 2050 research by the State Institute of Economics and Forecasting of the National Academy of Sciences of Ukraine confirms the economic and technical feasibility of Ukraine's transition to 91% of the RES by 2050



*"Ukraine is implementing energy sector reforms in line with the EU acquis, requirements of the international community. Integration of Ukraine's energy market into the EU energy market is a key priority today. Therefore, Ukraine's efforts are aimed at the implementation of the European legislation."*

*Approval of the Energy Strategy of Ukraine until 2035 was an impetus for intensifying the reform and shaping up full-fledged gas and electricity markets. The plans and practice of the development of the United Energy System of Ukraine should be closer to the plans and practices of the European Union member states, where the development of renewable energy sources has been identified as a priority. We have essentially completed developing a legislative framework in the energy sector, which will provide the basis for the investor security and confidence and capturing opportunities in the energy sector of Ukraine."*

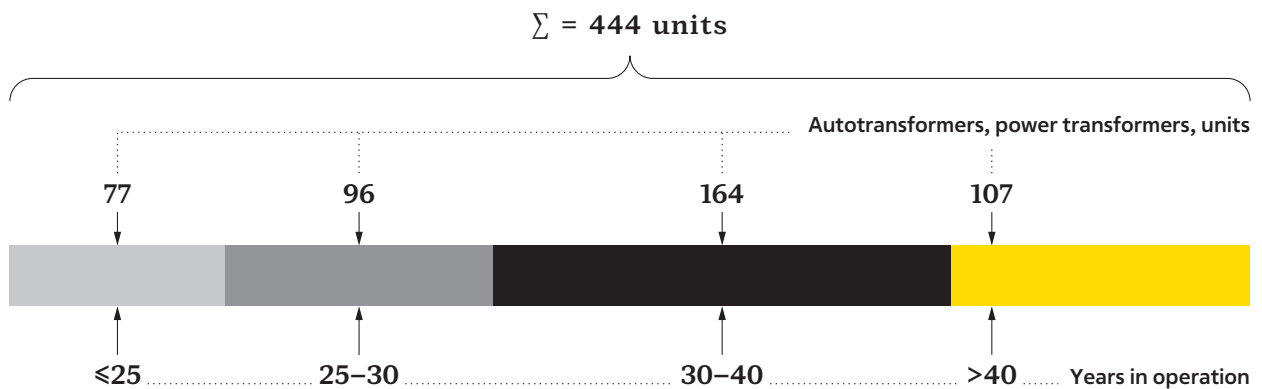
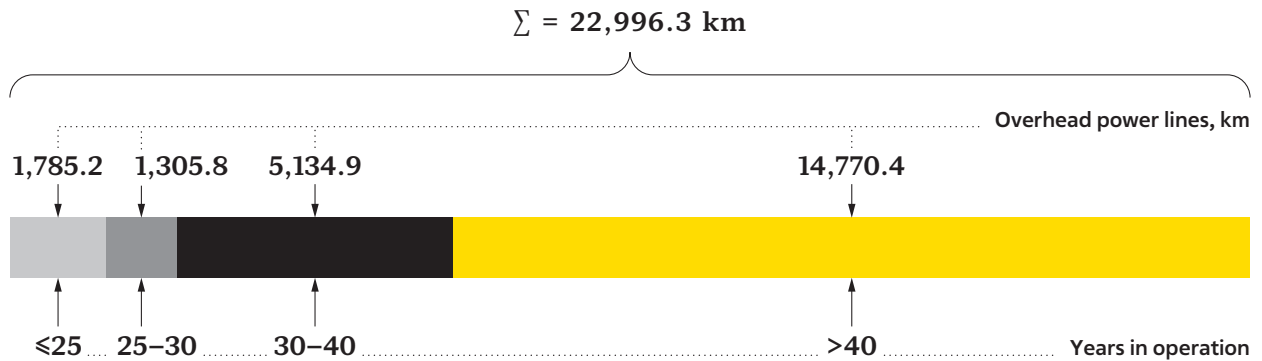
**Alexander Burtovoy, partner of Antika Law Firm**

# ENERGY MARKET OF UKRAINE

## KEY TRENDS

- ◇ The basic equipment of the transmission system was manufactured back in the 1950s–1970s and has not been fundamentally updated ever since, this resulted in a situation when the transmission system became severely worn out, and its technical characteristics limit the scope of integration of new technologies such as Smart Grids.

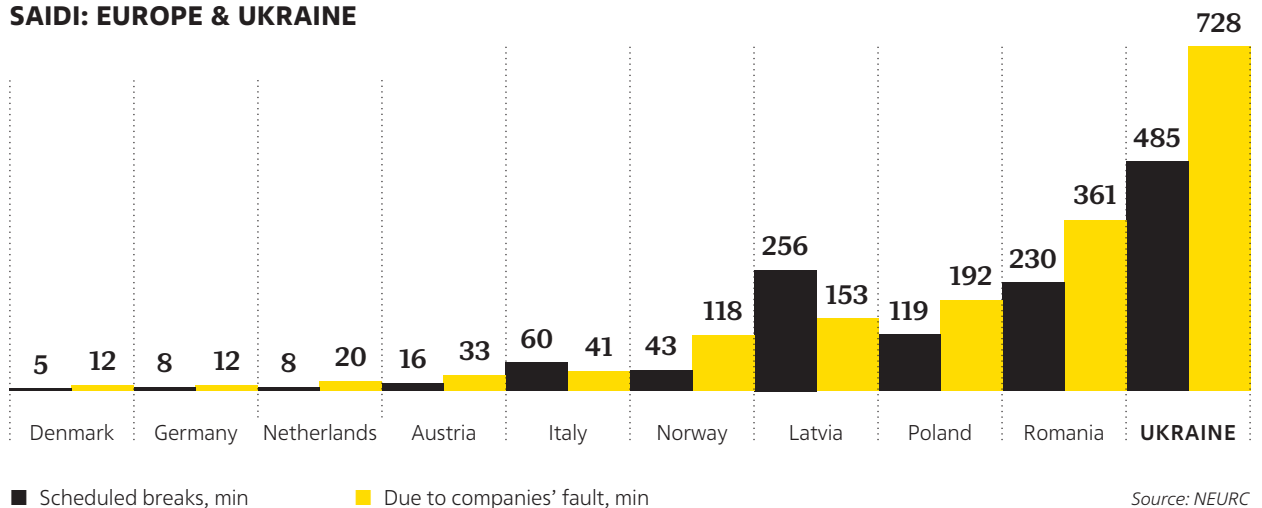
## TECHNICAL CONDITION OF THE TRANSMISSION SYSTEM



Source: Ukrenergo

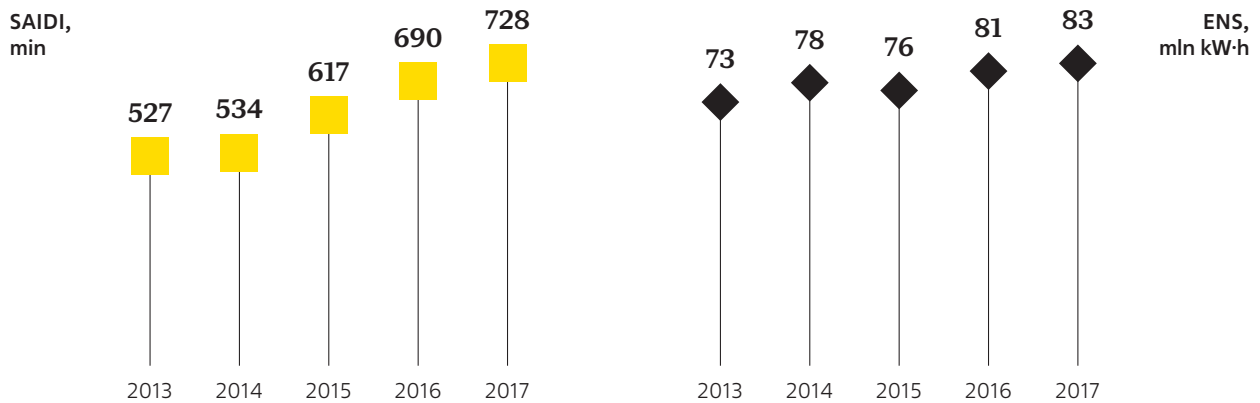
- ◇ The cumulative length of the Ukrainian electricity distribution network is very substantial – more than 800,000 km – which together with its age, results in the much higher SAIDI than in the EU countries.

## SAIDI: EUROPE & UKRAINE



- ◇ According to the Energy Strategy, the SAIDI will decrease to ≤150 minutes by 2035, and the target value of losses will reach 7.5% versus the current 11.3%. In order to reduce the losses to the targeted levels, investments in distribution networks should increase by 3–4 times versus the current EUR 180 per 1 km. Thus, each additional increase by EUR 100 per 1 km will reduce the level of losses by 1–1.5 pp.

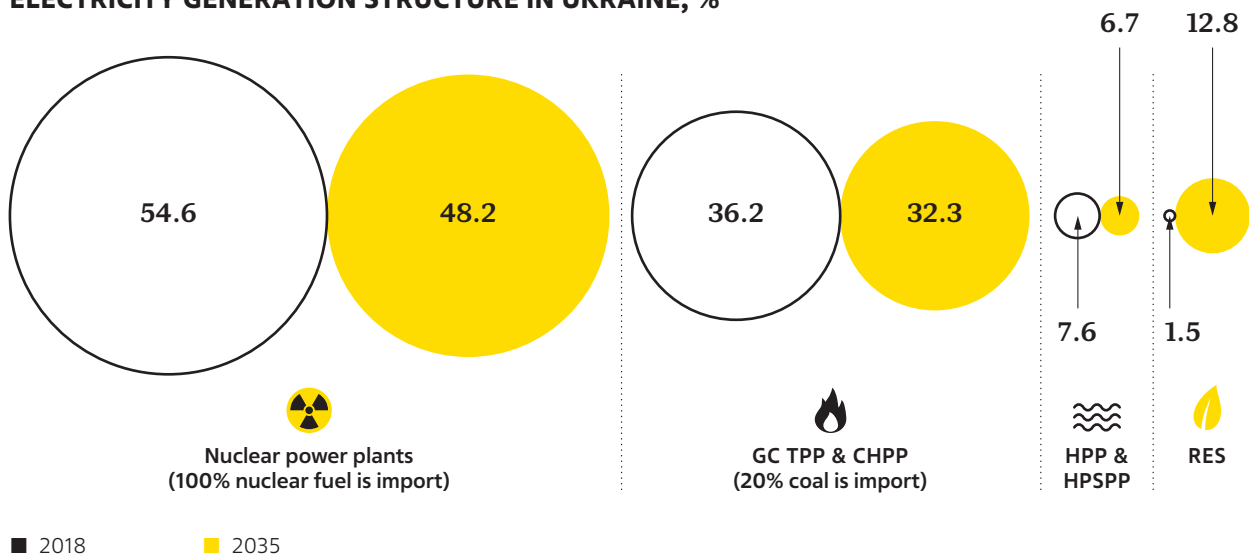
### DISTRIBUTION NETWORKS IN UKRAINE: ACTUAL INDICATORS



Source: NEURC  
 SAIDI: System Average Interruption Duration Index  
 ENS: Energy Not Supplied

- ◇ By 2035, Ukraine intends to increase the share of RES by 7 times. However, current technological set-up and relative volumes of RES in Ukraine don't allow renewable energy to comprehensively replace thermal power generation capacities. The importance of fossil generation, including coal, is redefined as the still most reliable and cheapest source of energy, which however requires substantial investments into new technologies to become compliant with the EU's environmental requirements. EUR 6.5 bln of new investments is thus required. It will be an important contribution to energy independence, because Ukraine can completely switch to its own coal, unlike nuclear fuel.

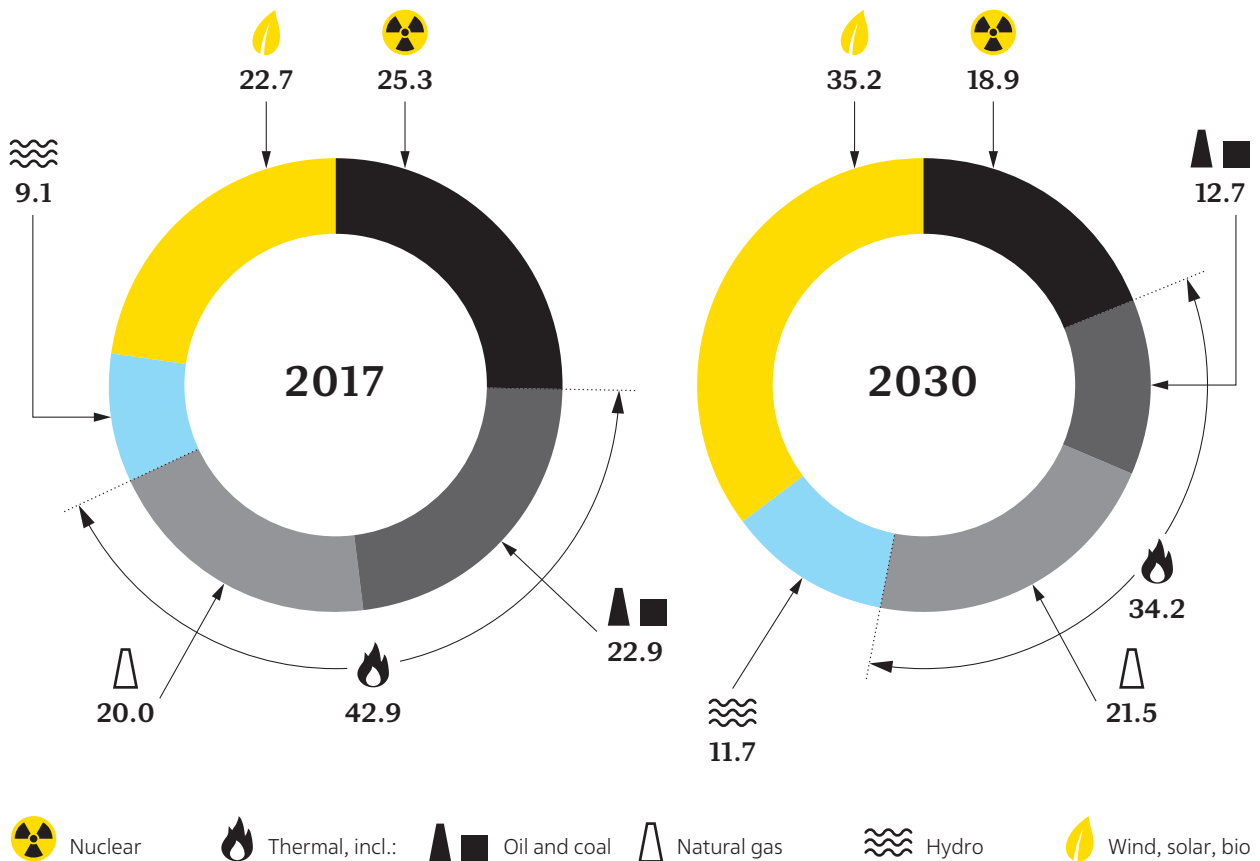
### ELECTRICITY GENERATION STRUCTURE IN UKRAINE, %



Sources: Ministry of Energy and Coal Industry of Ukraine, Energy Strategy of Ukraine until 2035

- ◇ On the cumulative basis, EU countries are on the clear track to increase electricity generation from the renewable sources at the expense of decreasing nuclear, oil, and coal capacity. However, coal will remain an important component of the energy mix in certain countries which means that thermal capacity will need to be reengineered rather than abruptly dismantled even in the EU over the next 10–20 years.

### ELECTRICITY GENERATION STRUCTURE IN EU, %



Sources: BP Statistical Review of World Energy 2018, IEA World Energy Outlook 2017

### MAIN CHALLENGES/ PROBLEMS OF THE FIELD

The modern Ukrainian energy sector has become obsolete, which significantly restrains and restricts the introduction of modern technologies in both power generation and distribution. According to conservative calculations, the generation and interstate overhead power transmission lines investment needs will exceed UAH 500 bln by 2026. The total energy needs can reach EUR 80 bln. According to the State Statistics Service of Ukraine, the industry received about UAH 30 bln in 2017 which is significantly below the required level.

### PROSPECTS, OPPORTUNITIES, INNOVATIONS IN THE FIELD

Liberalization of the sector through reforms allows the country to get out of investment isolation and raise funds to build a modern power industry. In 2017, the Law of Ukraine *On Electricity Market*, came into force. It implements the Third Energy Package and provides for the transition to a new (competitive) market model starting from July 1, 2019. Today there is more confidence that this date is realistic. It is important not to reduce the pace of reforms since launching the new market model will in fact become the answer to the question, “Is Ukraine going the European way?”



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The leaders.  
The innovators.  
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# HEALTHCARE SYSTEM OF UKRAINE

## KEY TRENDS

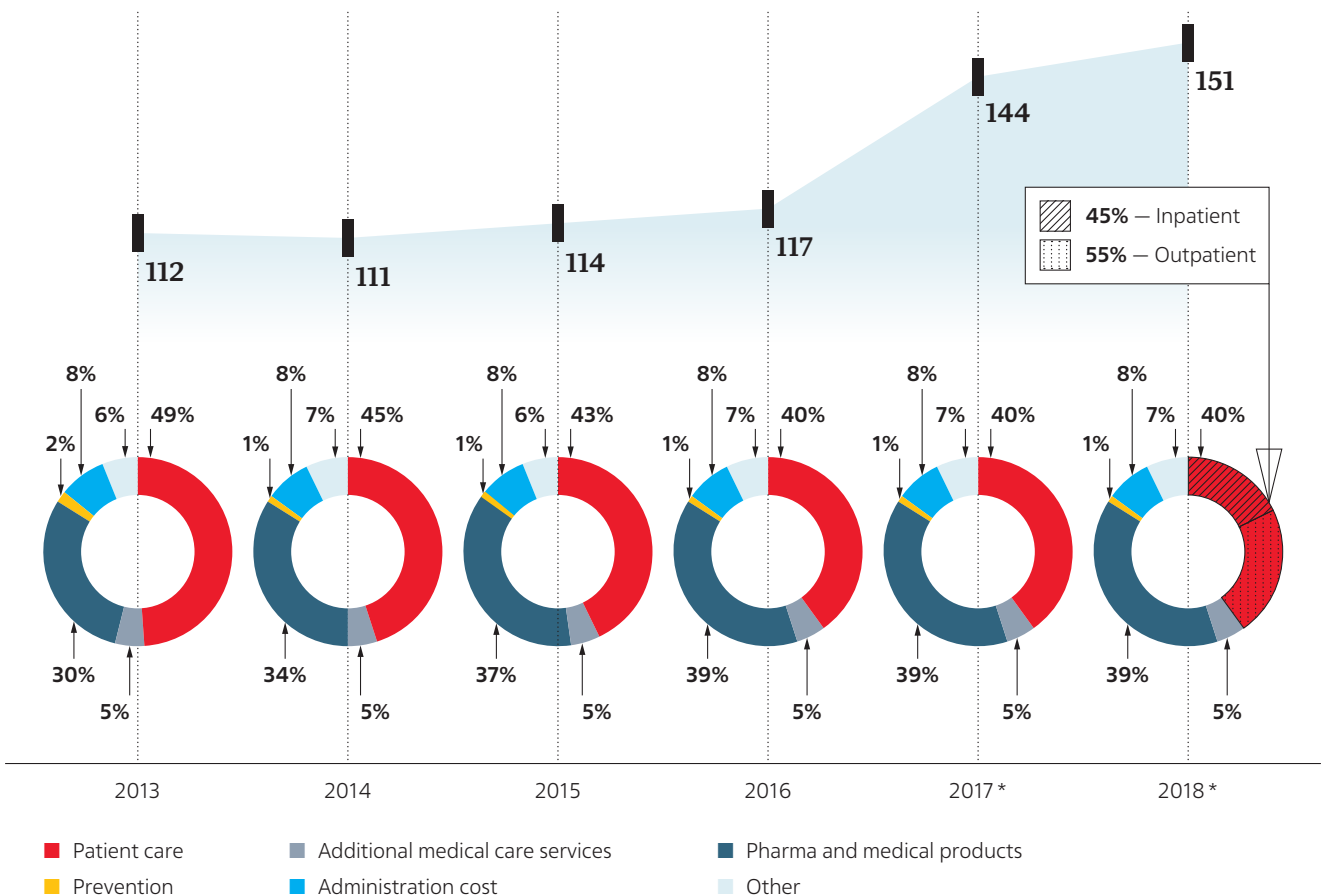
Source: IQVIA Database, WHO, BMI Report

- ◇ Ukraine still has an old Soviet system, in which hospitals are compensated according to the number of days spent by patients in hospital, creating an incentive to artificially increase patients' stay
- ◇ Hospitals are managed by regional health administrations which are not coordinated, causing redundancy in hospital availability
- ◇ Healthcare sector optimization activities result in decrease in the number of hospitals, hospital beds, and average patient stays. On average, the number of hospitals decreases by 3% each year
- ◇ In 2018, the number of private cabinets across all regions of Ukraine reached ≈400 clinics with ≈650 family doctors involved

## HEALTHCARE SYSTEM OVERVIEW

- ◇ The Ukrainian healthcare system is regionalized: ≈80% of total healthcare spending goes to 27 regional health administrations. This leads to a redundancy and lack of centralized strategy in healthcare provision
- ◇ The state healthcare is fully funded by tax revenues
- ◇ There is a strong domination of public hospitals within the inpatient segment, while outpatient services are provided by both public and private clinics
- ◇ Ukrainian healthcare is driven 50% by private spending, which is much higher than in most other comparable countries where the private health spending share is ≈15–30%

## HEALTHCARE EXPENDITURE STRUCTURE, UAH BLN



Source: BMI Report, State Statistic Service of Ukraine

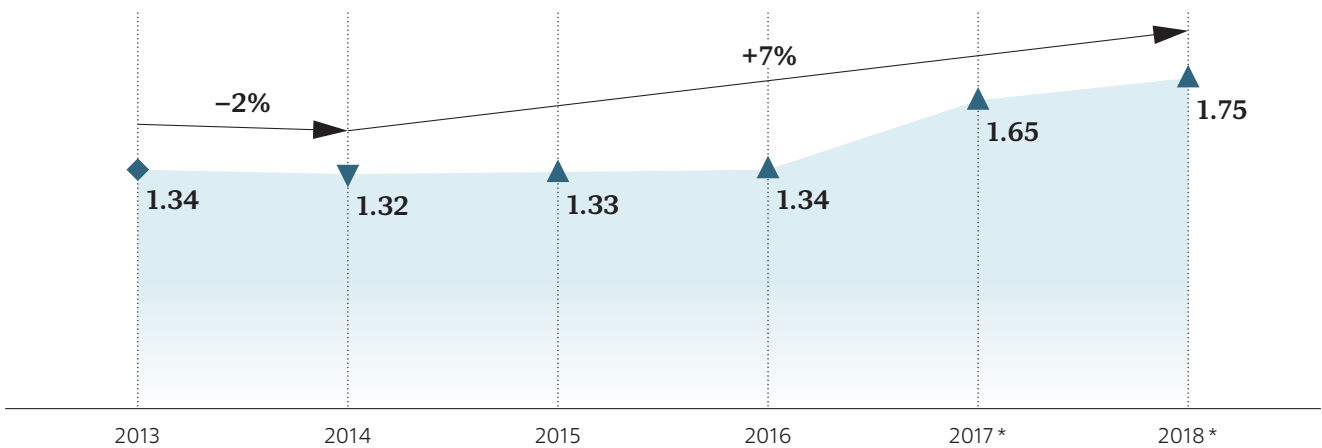
\* IQVIA Forecast based on expert interviews



**HEALTHCARE REFORM**

- ◇ The healthcare sector was underfunded for many years after the end of the Soviet Union. Patients have been suffering for years from lack of access to essential medical services and the services being converted in the shadow market in reality
- ◇ In February 2017, the Ministry of Health presented a reform perspective for 2017–2020
- ◇ The reform targets include an increase in public funding of patient services for a state-based guaranteed amount of services and a boost in efficiency by creating competition for patients in the sector
- ◇ The focus areas include the introduction of a new funding model for primary care, creation of a national health service, creation of hospital districts, and extension of reimbursement of the cost of pharmaceuticals
- ◇ The scope of the program covers medical services, pharmaceuticals, and medical devices covered by the “money follows the patient” principle
- ◇ The new entity, the National Health Service of Ukraine (NHS), has been established to run the funding of hospitals based on patient cases

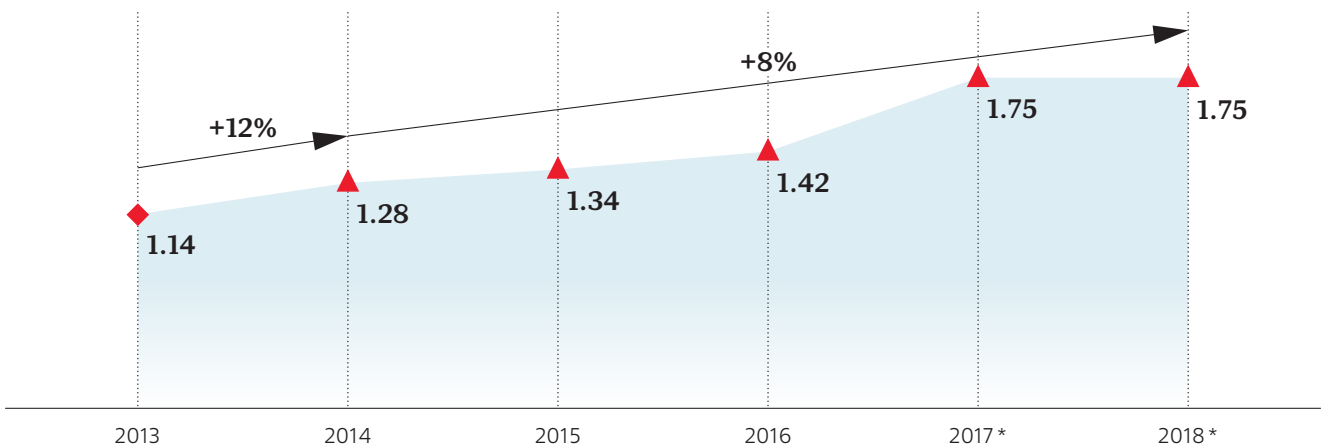
**GOVERNMENT (PUBLIC) HEALTHCARE SPENDING, ‘000 UAH PER CAPITA**



Source: BMI Report, State Statistic Service of Ukraine

\* IQVIA Forecast based on actual data for 1H 2018 and expert estimates for the 2018 full year

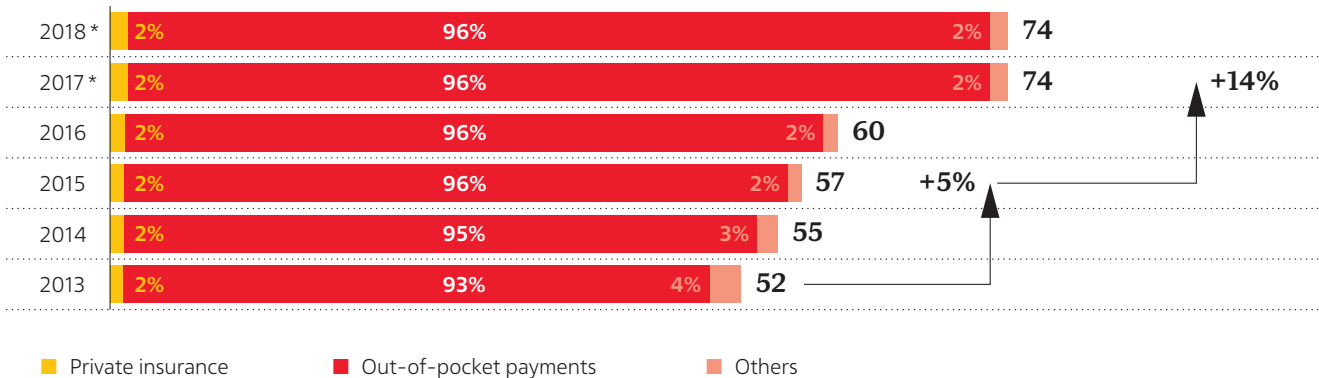
**PRIVATE HEALTHCARE SPENDING, ‘000 UAH PER CAPITA**



Source: BMI Report, State Statistic Service of Ukraine

\* IQVIA Forecast based on expert interviews

### PRIVATE HEALTHCARE SPENDING, UAH BLN

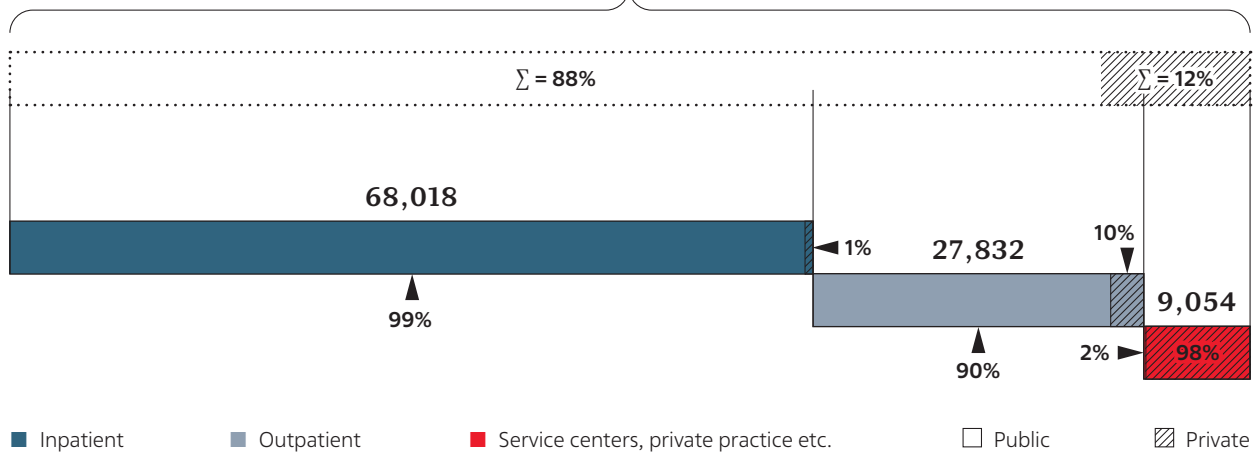


Source: BMI Report, State Statistic Service of Ukraine

\* IQVIA Forecast based on expert interviews

### HOSPITAL MARKET STATISTICS, # OF WORKPLACES

$\Sigma = 104,904$  workplaces /  $\Sigma \approx 4,000$  clinics



Source: IQVIA Database, WHO, BMI Report

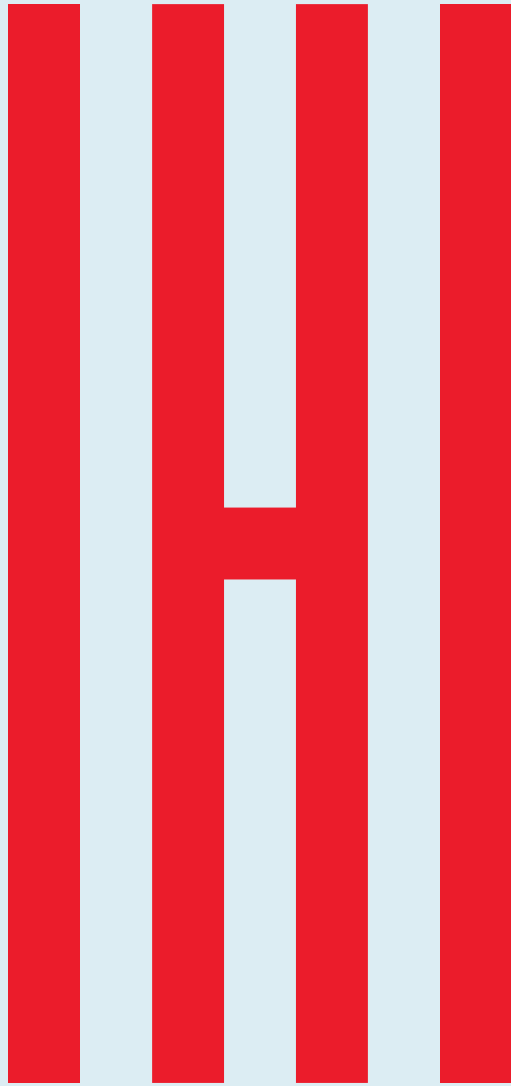
Foregoing data was prepared by IQVIA Technology Solutions Ukraine, LLC, Baker & McKenzie — CIS Limited, and American Hospital Kyiv, LLC, as part of joint marketing and legal research by exclusive order of American Hospital Kyiv, LLC



“The ongoing reform of the healthcare system definitely leads to irreversible changes in the existing healthcare market. As a matter of fact, there are only a few possible measures that can be taken by the state to avoid or at least mitigate the possible financial default of the existing public healthcare infrastructure within the implementation of the reform:

1. Practical application of the Law on ‘autonomization’ of healthcare facilities, which are already in force, but in fact not broadly enough applied.
2. Privatization of healthcare institutions.
3. Public-private partnership which is assumed to be the most effective alternative considering the present state of existing assets. Long term cooperation with private investors and guaranteed levels of hospital occupancy will secure jobs and fair wages for medical sector specialists and will be attractive for investors.”

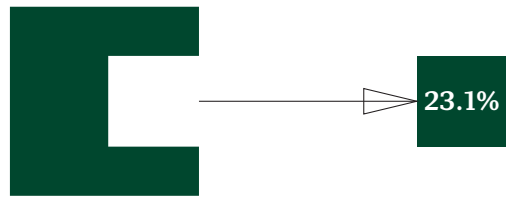
**Oleksii Shershnov, CEO, American Hospital Kyiv, LLC**



**Health really  
matters**

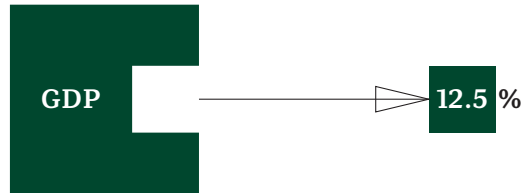
# INSOLVENCY

## COMMERCIAL COURTS, 1<sup>ST</sup> INSTANCE, 2017\*



### 17,600 insolvency cases

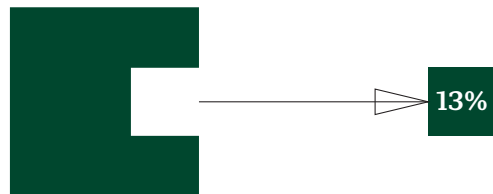
were considered, which is 23.1% of the annual volume of all commercial cases considered. Among all commercial cases (76,400), insolvency cases rank second after the property disputes.



### USD 14 billion

the total amount of creditors' pecuniary claims against debtors in insolvency cases (12.5% GDP of Ukraine in 2017).

## THE SUPREME COURT, 1<sup>ST</sup> SEMESTER 2018\*



### 1,400 insolvency cases

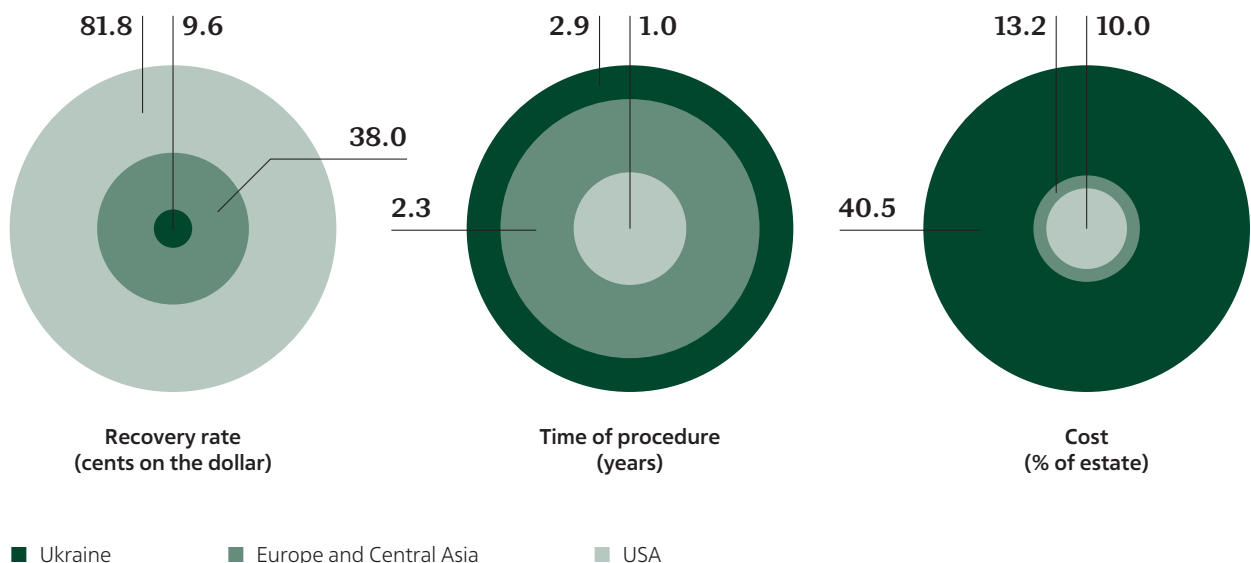
are in courts, which is 13% of all commercial cases in the cassation instance.

## DOING BUSINESS 2019\*\*

### 145 of 190 – position of Ukraine

in the insolvency settlement ranking. Insolvency – the lowest index of Ukraine in the Doing Business ranking.

## EFFICIENCY OF INSOLVENCY PROCEDURES: COMPARISON



\* Data of the State Court Administration of Ukraine

\*\* Ukraine in the ratings of Doing Business [Electronic resource] // The World Bank. – 2019  
[http://www.doingbusiness.org/en/data/exploreconomies/ukraine#DB\\_ri](http://www.doingbusiness.org/en/data/exploreconomies/ukraine#DB_ri)

## MAIN PROBLEMS/DIFFICULTIES OF THE FIELD

On October 18, 2018, the Verkhovna Rada of Ukraine adopted the Ukrainian Code of Insolvency Procedures. The new law is expected to substantially improve the efficiency and transparency of insolvency procedures, as well as the position of Ukraine in the World Bank's rating of Doing Business.

According to Doing Business 2017, the following problems are typical for insolvency in Ukraine:

1. Huge losses in the insolvency procedures –  
**40.5% of the company assets;**
2. Lengthy insolvency procedure –  
**2.9 years;**
3. Insignificant coefficient of return of creditors' funds –  
**9.6 cent of each \$1 of the loan;**
4. Unsatisfactory final result –  
a sale of company's assets in parts rather than continuation of operation.

## FORECAST, PROSPECTS, INNOVATIONS IN THE FIELD

### Code of Insolvency Procedures of Ukraine: 10 key novelties:

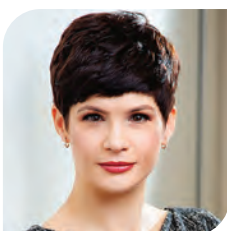
1. Sale of assets exclusively on electronic auctions.
2. Introduction of the institute of insolvency of individuals.
3. Removal of barriers and simplification of the insolvency procedures access.
4. Possibility of rehabilitation and out-of-court settlement.
5. Improvement of the status of secured creditors.
6. Increase of the level of creditors' rights protection.
7. Fewer opportunities to contest the results.
8. Introduction of the rules to control sale of substantially all assets on auctions.
9. Ensuring a higher price of contracts made through auctions.
10. Improvement of the provisions that ensure functionality of the active business.



*“Codification of insolvency procedures may improve the investment attractiveness of Ukraine, as well as become an impulse for the economic growth and business development. The new law is expected to make insolvency more effective and transparent. A simpler access to the insolvency procedures, their shorter duration, transparency of debtor's assets sale and many other novelties provide the companies and the investors with the prospects of saving assets and renewal of production.*

*Simultaneously, release from the burden of exorbitant debts must be strictly controlled to prevent illegal abuses in the sphere.”*

**Artem Stoyanov, Senior Partner, LCF Law Group**



*“Availability of the procedure of insolvency for an individual is one of the main novelties in the Code of Insolvency Procedures. This will certainly change the market of consumer crediting and will facilitate the recovery of the banking system as a whole.”*

**Olena Volianska, Counsel, LCF Law Group**

# KEY CHANGES AND TRENDS FOR UKRAINIAN BUSINESS IN 2018

## KEY CHANGES IN 2018

- ◇ The European Court of Human Rights' decision regarding the illegality of the moratorium on the alienation of agricultural lands has entered into force. Judicial practice in this respect has emerged
- ◇ The number of audits conducted in order to identify cases of hidden employment has increased
- ◇ The number of court disputes with fiscal authorities has declined by one-third with a relatively equal number of tax audits reconciled
- ◇ A number of currency restrictions have been abolished, in particular, those regarding dividend payments to non-residents, and the process for the early repayment of loans to non-residents has been simplified
- ◇ Installment plans have been implemented for paying VAT when importing equipment
- ◇ A compulsory audit has been introduced for medium-sized enterprises
- ◇ Debt to equity has been allowed
- ◇ A mechanism for settling legal relations between participants of an LLC has been introduced through a corporate agreement

## AUDITS OF LEGAL ENTITIES BY FISCAL AUTHORITIES, THE RESULTS OF WHICH HAVE BEEN RECONCILED

Number of **scheduled** audits, 2017

**4.085**

Number of **scheduled** audits, first 9 months of 2018

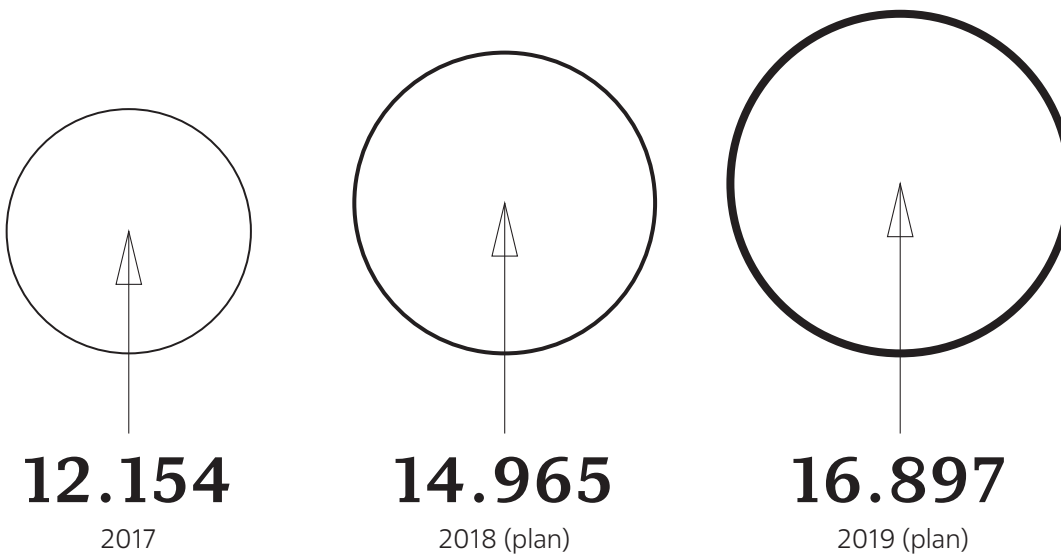
**3.309**

Number of **unscheduled** audits, 2017

**15.084**

Number of **unscheduled** audits, first 9 months of 2018

**10.377**

**TOTAL ADDITIONAL TAX LIABILITIES****UAH 16.3 bln****UAH 9.52 bln****NUMBER OF SCHEDULED AUDITS REGARDING LABOR LAW ISSUES**

Source: EBS

**TRENDS FOR BUSINESS**

- ◇ Introducing the obligatory reporting and taxation for CFCs (controlled foreign companies)
- ◇ Improving the taxation rules for permanent establishments of non-residents
- ◇ Introducing a simplified mechanism of proving the profitability of low value added intercompany services in the context of transfer pricing
- ◇ Currency liberalization continues, in particular, regarding the abolition of individual NBU licenses for conducting foreign exchange operations and the extension of the deadline for loaning earnings in foreign currency from 180 to 365 days
- ◇ Corporate profit tax may be replaced with exit capital tax



*“It is clear that, in 2019, the state plans to continue its course of pulling the economy out of the shadows.*

*The strengthening of accentuated control seems a logical step. However, there are good reasons to believe that business reluctantly leaves the shadows until the inevitability of penalties becomes apparent.*

*At the same time, the results of this struggle to achieve transparency in business can provide a resource for triggering the reform of archaic legal restrictions, what could become a kind of ‘liberal carrot’.”*

**Igor Sinitsyn, EBS Senior Tax Advisor**

# LIFE INSURANCE MARKET OVERVIEW

## GROSS INSURANCE PREMIUMS OF TOP COMPANIES, UAH MLN

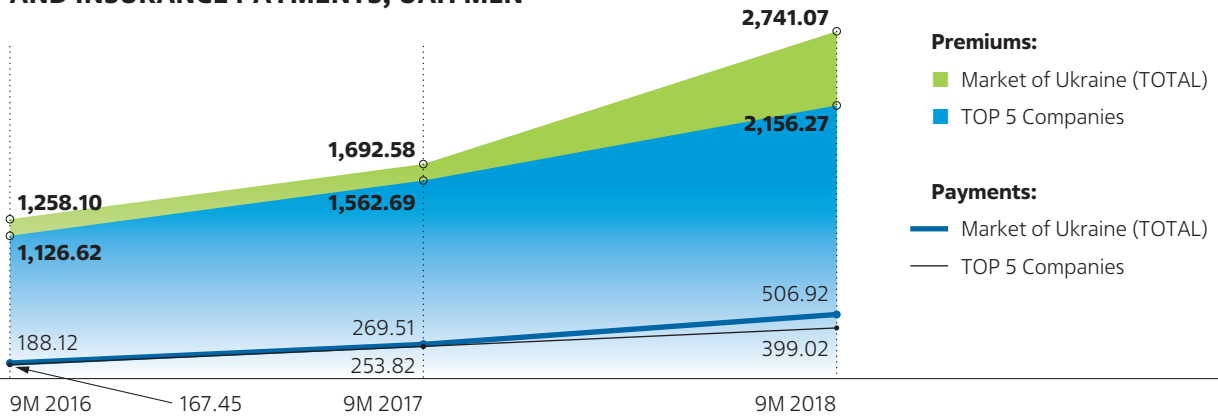
#	Company	9M 2016	9M 2017	Δ	9M 2018
1	MetLife	433.43	530.19	→ +26%	→ 670.33
2	Uniqa Life	191.72	326.69	→ +41%	→ 460.56
3	TAS	209.79	322.18	→ +13%	→ 365.43
4	ASKA-Life	122.16	173.62	→ +107%	→ 358.86
5	PZU Ukraine Life Insurance	169.52	210.01	→ +43%	→ 301.09
<b>TOP 5</b>		<b>1,126.62</b>	<b>1,562.69</b>	→ +38%	→ <b>2,156.27</b>
<i>Market concentration of TOP 5</i>		<i>90%</i>	<i>92%</i>	→ -15%	→ <i>77%</i>
6	AXA Life	29.30	44.47	→ +52%	→ 67.52
7	Kniazha-Life Vienna Insurance Group	67.41	42.53	→ +14%	→ 48.56
8	INGO Ukraine Life	17.43	23.63	→ +16%	→ 27.43
<b>Market of Ukraine (TOTAL)</b>		<b>1,258.10</b>	<b>1,692.58</b>	→ +61.9%	→ <b>2,741.07</b>

## GROSS INSURANCE PAYMENTS OF TOP COMPANIES, UAH MLN

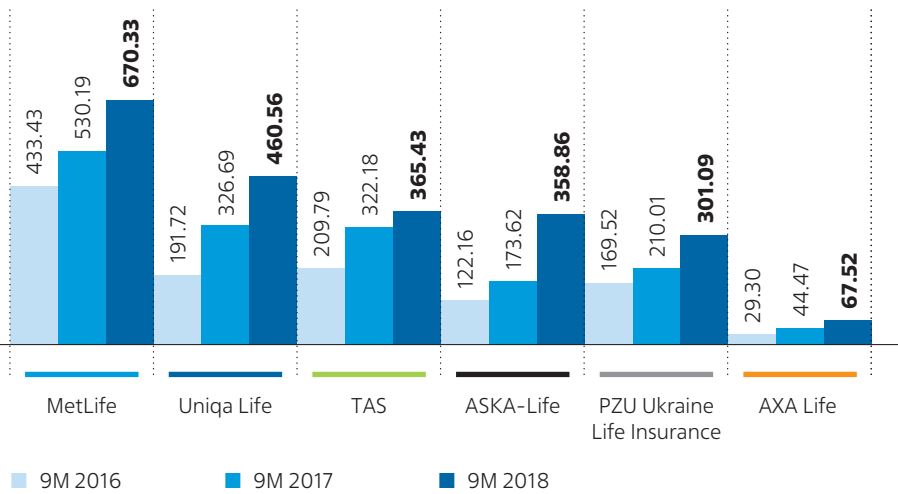
#	Company	9M 2016	9M 2017	Δ	9M 2018
1	Uniqa Life	6.11	16.96	→ +616%	→ 121.50
2	TAS	50.66	74.88	→ +46%	→ 109.41
3	MetLife	43.88	68.03	→ +58%	→ 107.65
4	PZU Ukraine Life Insurance	40.28	71.70	→ -44%	→ 40.42
5	ASKA-Life	26.52	22.25	→ -10%	→ 20.04
<b>TOP 5</b>		<b>167.45</b>	<b>253.82</b>	→ +57%	→ <b>399.02</b>
6	INGO Ukraine Life	7.51	8.62	→ -10%	→ 7.76
7	Kniazha-Life Vienna Insurance Group	<i>n/a</i>	5.25	→ -3%	→ 5.09
8	AXA Life	0.27	0.61	→ +401%	→ 3.06
<b>Market of Ukraine (TOTAL)</b>		<b>188.12</b>	<b>269.51</b>	→ +88%	→ <b>506.92</b>



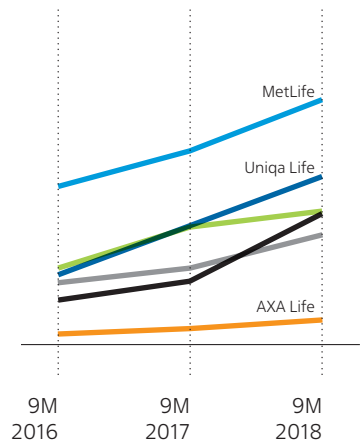
### DYNAMICS OF INSURANCE PREMIUMS AND INSURANCE PAYMENTS, UAH MLN



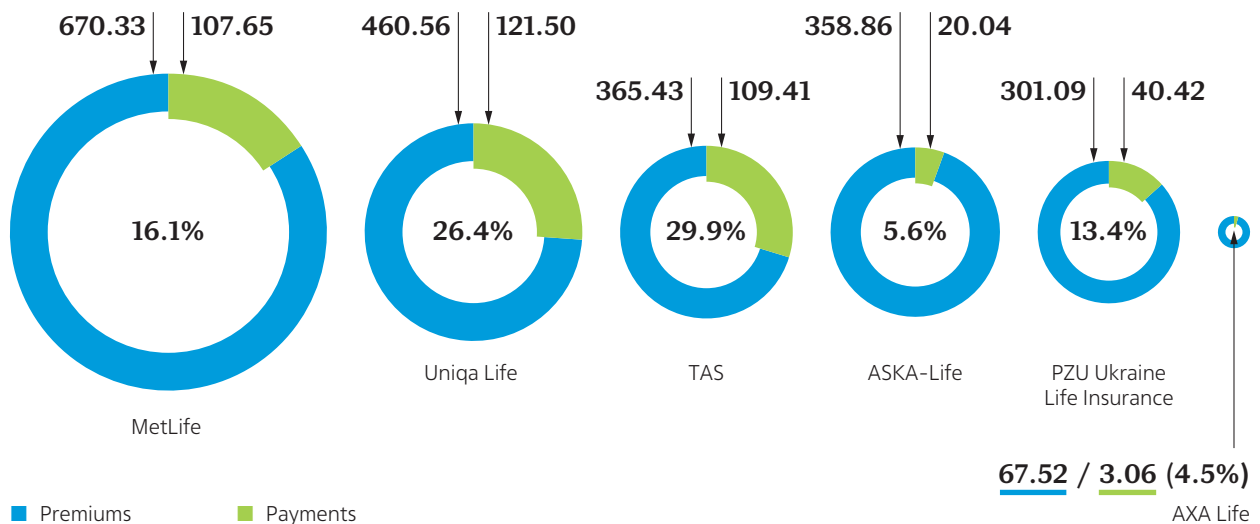
### KEY COMPANIES INSURANCE PREMIUM GROSS, UAH MLN

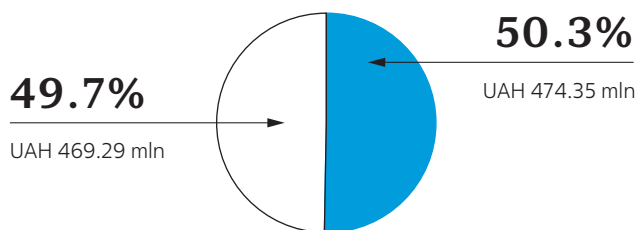
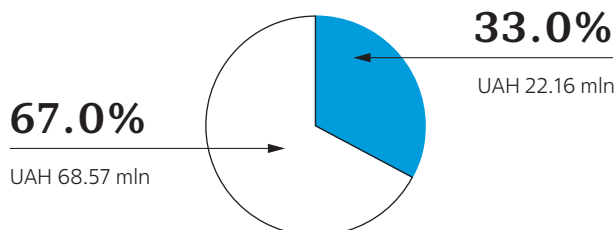


### DYNAMICS:



### KEY COMPANIES INSURANCE PREMIUM VS PAYMENT RATIO (9M 2018), UAH MLN



**INDIVIDUAL LIFE INSURANCE,  
9M 2018**

**CORPORATE LIFE INSURANCE,  
9M 2018**


□ Other companies

■ MetLife

**MAIN  
CHALLENGES/  
PROBLEMS  
OF THE FIELD**

Unfortunately, the potential of life insurance instruments is not yet fully integrated in the Ukrainian economy and the social sector: the life insurance policy is still owned by no more than 4% of Ukrainians. According to various studies, about one-third of Ukrainians, who have been diagnosed with sudden illness, refuse or delay treatment due to lack of money. In the case of severe, deadly diseases or severe injuries, such refusal can cost them their lives. Due to wider usage of life insurance programs with the payment of benefits in case of a critical illness and accidents, the problem of financial support for expensive treatment can be solved at the expense of an insurance company.

**PROSPECTS,  
OPPORTUNITIES,  
INNOVATIONS  
IN THE FIELD**

Top companies of the life insurance market are developing cooperation with the leading Ukrainian employers in two key areas:

- ◇ With corporate life insurance clients – in case of injuries, critical illnesses, disability, etc. The protection of employees under risk life insurance programs, together with voluntary medical insurance, is becoming a widespread practice in the domestic labor market and forms the image of a socially responsible employer,
- ◇ With the best social practice providers that care about the welfare of employees through raising their financial awareness. Within their social responsibility programs, Ukraine's leading employers have begun to provide the staff and their families with knowledge about modern financial tools. Life insurance providers are actively involved in such information campaigns.



*“The second area of cooperation is innovative and, at the same time, very promising for the Ukrainian life insurance market, as the leading employers are actually teaching their employees the basics of financial literacy and personal risk management through the use of life insurance programs. The next possible step is the gradual increase of a financial inclusion level for employees of such enterprises. Employees of socially responsible companies will be able to access the best terms of insurance protection (for example, at their own expense, but on corporate terms). In 2019–2020, when the state undergoes a gradual transformation of the social sector, when economically active citizens are forced to assume more and more responsibility for their own financial support, care for financing of their own pensions and payment for their own and their families' treatment, both such financial knowledge and access to quality insurance services with the support of their employer are extremely relevant.”*

**Svetlana Kandyba,**  
**Director for Corporate Clients of PJSC MetLife**

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# MAIN LABOR MARKET TRENDS IN 2018

## 1. LACK OF SKILLED PERSONNEL AND LABOR MIGRATION

The trend of a lack of personnel (both skilled and unskilled workers) continues and is confirmed by the reduction of the unemployment rate, which fell from 9.6 percent to 8.9 percent between the first half of 2017 and the first half of 2018. At the same time, the employment rate continues to grow and the lack of skilled workers is especially notable.

Unemployment rate, first half of **2017**:

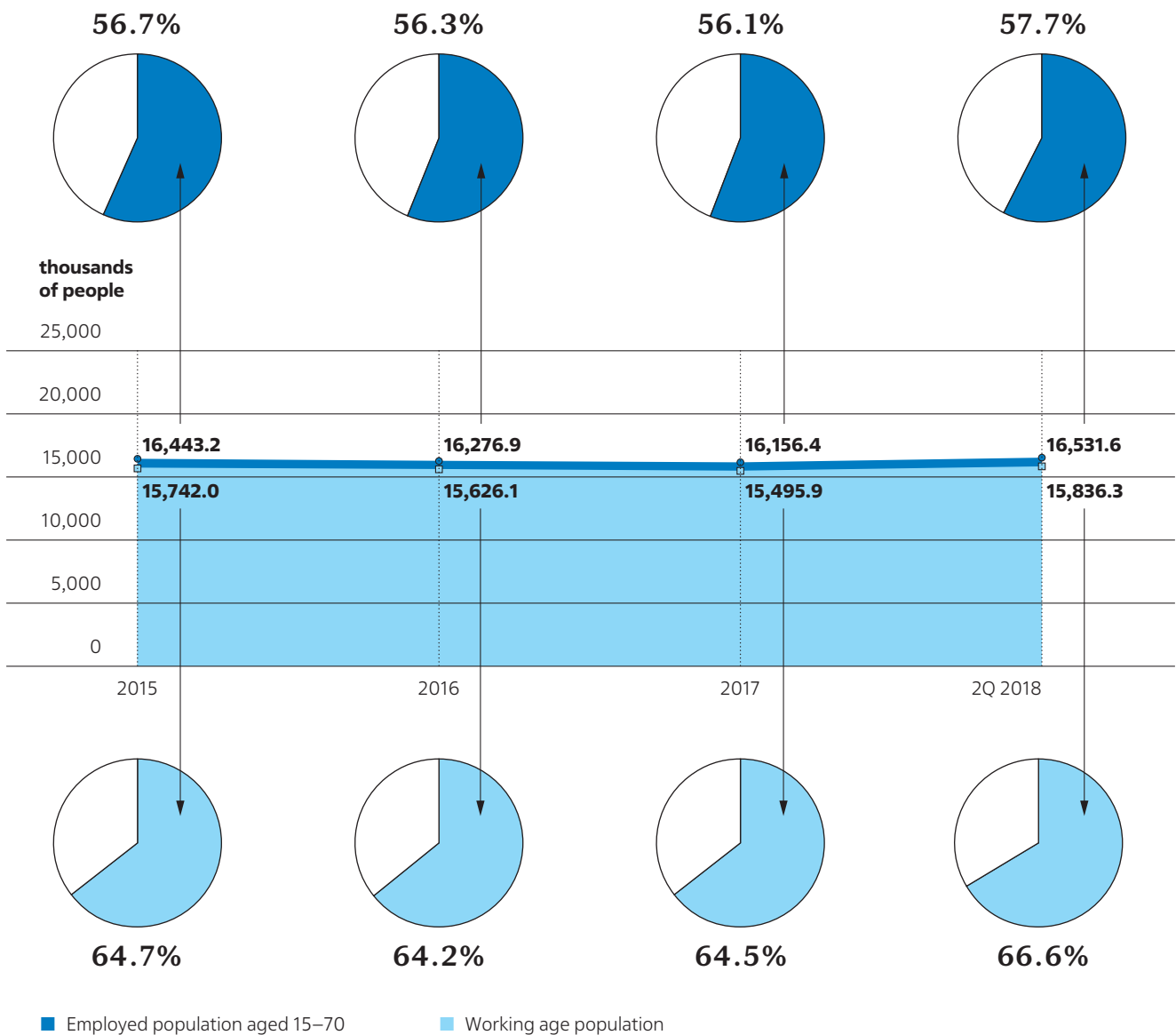
**9.6%**

Unemployment rate, first half of **2018**:

**8.9%**

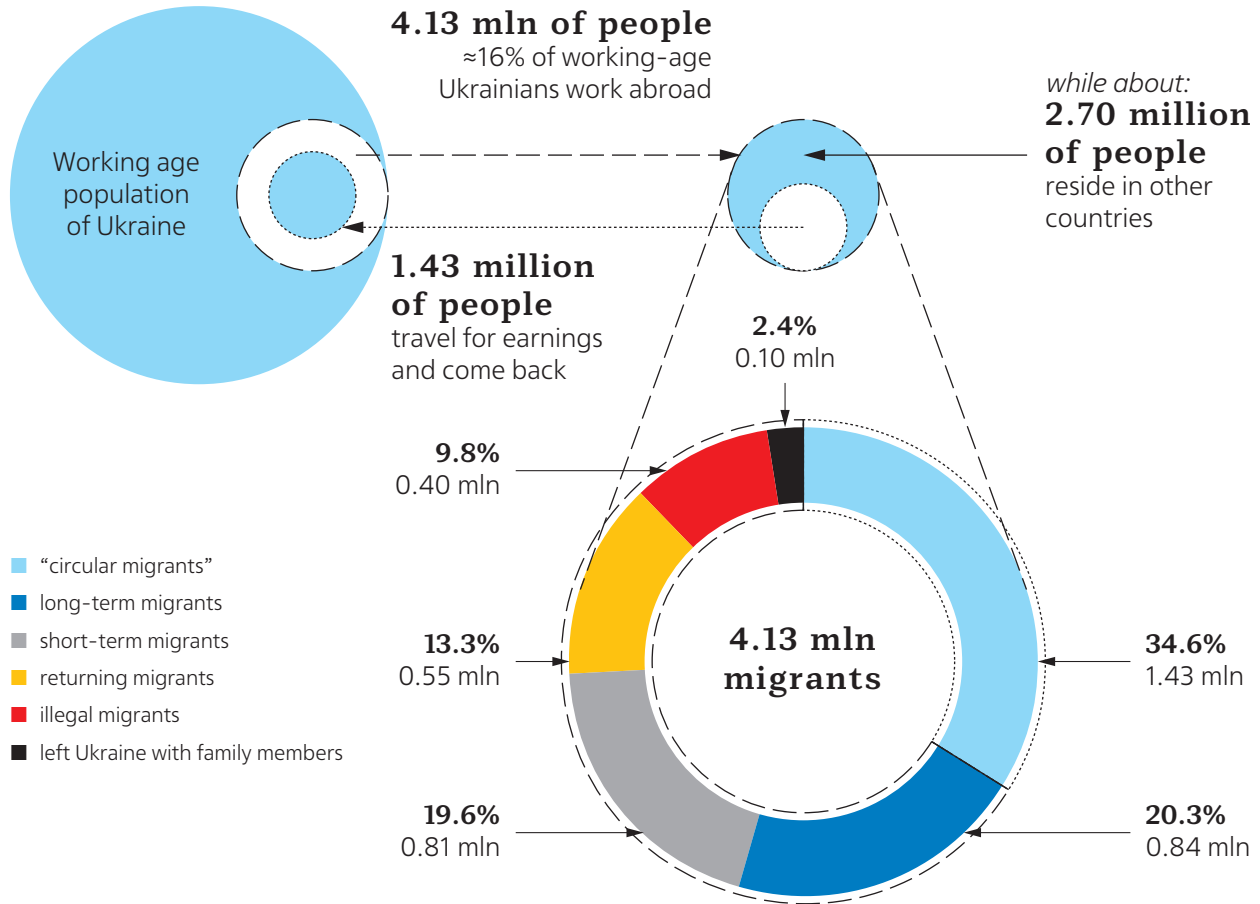
Source: [https://www.dcz.gov.ua/sites/default/files/infofiles/2\\_sytuaciya\\_na\\_rynku\\_praci\\_1.pdf](https://www.dcz.gov.ua/sites/default/files/infofiles/2_sytuaciya_na_rynku_praci_1.pdf)

## QUANTITY AND RATE OF EMPLOYED POPULATION IN UKRAINE FOR THE PERIOD OF 2015–2018



Source: [http://www.ukrstat.gov.ua/express/expres\\_u.html](http://www.ukrstat.gov.ua/express/expres_u.html)

**STATISTICS OF LABOR MIGRATION  
2015–2017, MLN PEOPLE**



Source: <http://uacrisis.org/ua/66428-research-on-labor-migration-ces>

**2. OUTDATED LEGISLATION IN THE LABOR FIELD**

In comparison with the attractiveness of the job market abroad, with good salaries and high social standards, the local job market has been quite negatively affected by Ukrainian non-adaptable and outdated domestic legislation.

**YEARS OF ADOPTION OF BASIC LEGAL ACTS IN THE LABOR FIELD**

#	Legal Act	Date of Adoption
1	The Labor Code of Ukraine No. 322-VIII	10.12.1971
2	The Law of Ukraine “On Employment of Population” No. 5067-VI	05.07.2012
3	The Law of Ukraine “On Remuneration of Labor” No. 108/95-BP	24.03.1995
4	The Law of Ukraine “On Labor Protection” No. 2694-XII	14.10.1992
5	The Law of Ukraine “On Vacations” No. 504/96-BP	15.11.1996
6	The Law of Ukraine “On Collective Agreements and Contracts” No. 3356-XII	01.07.1993

### 3. PURPOSIVENESS AND GRADUAL INCREASE OF HUMAN CAPITAL INDEX (HCI) FOR THE PRESERVATION OF LABOR RESOURCES

<b>88<sup>th</sup> position (of 189)</b>	▶ Ranks Ukraine in the rating of countries for which HCI is applicable (upgrade of position)
<b>+9% income (GNI)</b>	▶ Gross national income (GNI) per capita increased by approximately 9 percent in 2015–2017
<b>+2.3 years of life</b>	▶ Life expectancy increased by 2.3 years in Ukraine in 1990–2017
<b>+2.2 years of studying</b>	▶ The average number of years spent studying increased by 2.2 years

#### MAIN PROBLEMS/ DIFFICULTIES OF THE FIELD

- ◇ Outdated legislation preventing usage of main market instruments for motivation of employees (lack of regulation of equity-based plans, KPI rewards, etc.)
- ◇ Improper judicial system aimed at the protection of employee's rights even in the case of rights abuse by the latter
- ◇ Absence of progress in the adoption of the Labor Code
- ◇ Absence of a clear strategy for the salary tax legislation development
- ◇ The employee migration abroad
- ◇ Lack of effective regulation in the field of outstaffing/outsourcing

#### PROSPECTS, POSSIBILITIES, INNOVATIONS IN THE FIELD

- ◇ Adopting regulations to open the Ukrainian market to progressive employment changes
- ◇ Continuing the trend towards recruitment of young professionals
- ◇ Increasing the remote employment popularity
- ◇ Reforming the social security is expected (reducing the outflow of social capital)
- ◇ Strengthening gender equality requirements and transparency in employment
- ◇ Strengthening the requirements for the employment of foreigners
- ◇ Reducing the number of unregistered employees
- ◇ Continuing the trend toward the fulfillment of secondary business functions through outsourcing/outstaffing



*“Ukraine has great potential for the development of the human capital market. Nowadays, the two main challenges in the field are the outflow of human resources abroad and the collision of modern trends in the development of the labor market with outdated legislation. Recent reforms being implemented in Ukraine have given hope for improvement of key legislative acts that will create conditions for the return of labor to Ukraine and the proper functioning of the country in the era of e-economy.”*

**Olena Martsynovska,**  
Associate, DLA Piper Ukraine LLC

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ON-SITE  
TEAM



INSTANT  
CONNECTION  
WITH  
OPERATOR



SPECIAL  
OFFERS



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**PLATINUM**

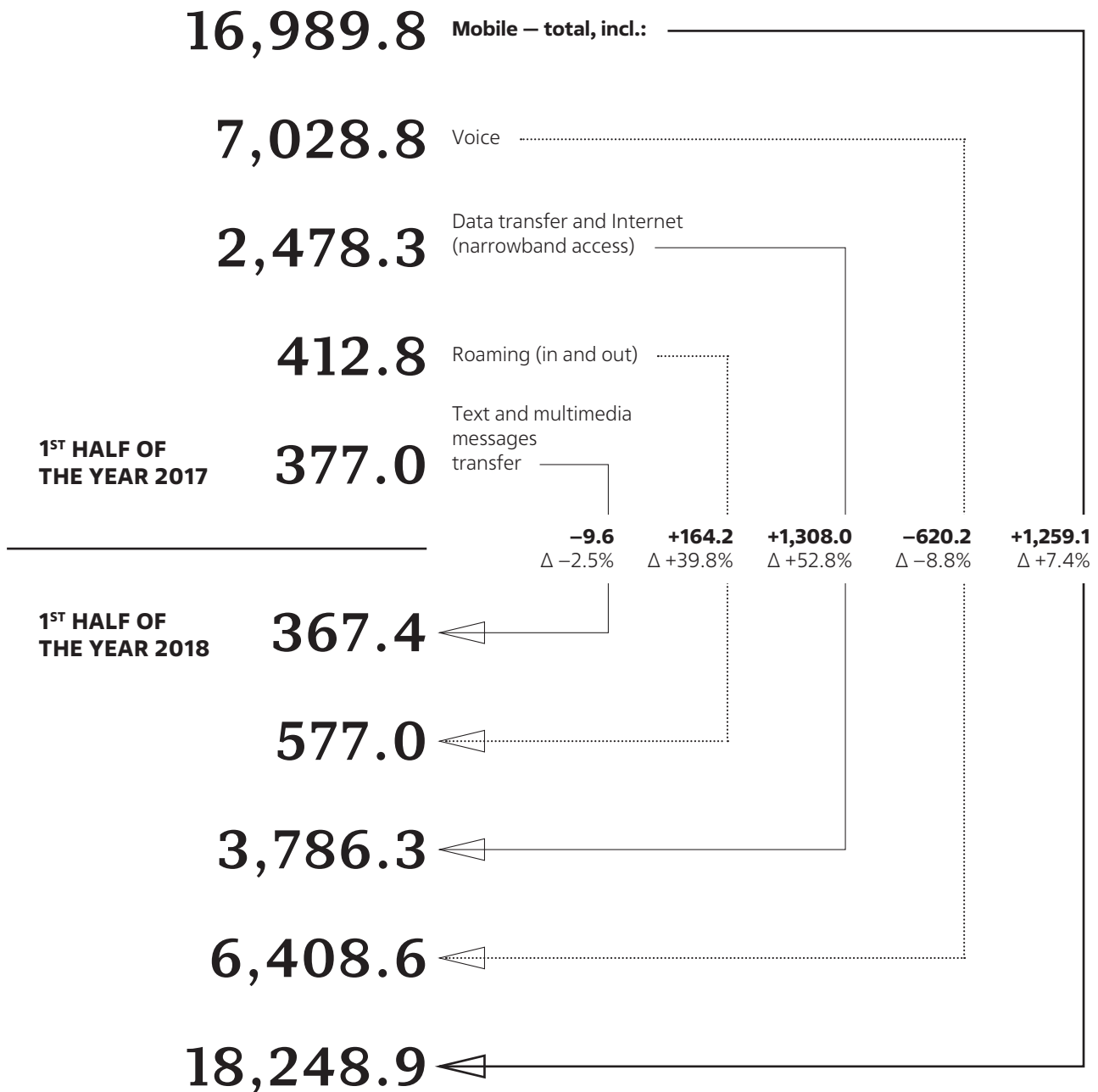


FOR LIFECCELL SUBSCRIBERS  
WHO VALUE THEIR TIME AND  
INDIVIDUAL APPROACH

# MOBILE COMMUNICATIONS

Figures are presented without data from Autonomous Republic of Crimea, city Sevastopol and part of ATO zone

## REVENUES FROM MOBILE SERVICES, UAH MILLION



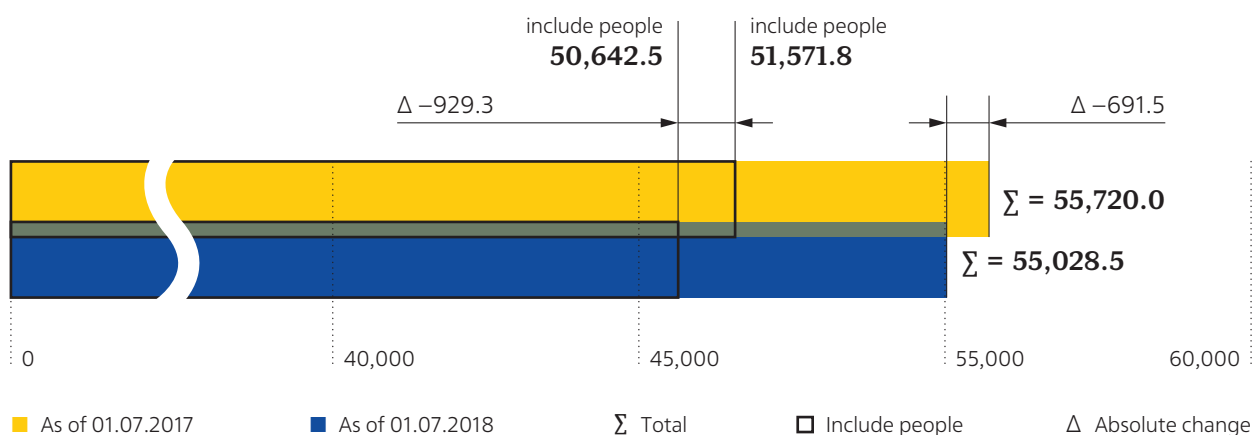
Source: State Statistics Service of Ukraine

In the 1<sup>st</sup> half of 2018, revenues from mobile communication increased by 7.4%, as compared to the 1<sup>st</sup> half of 2017 and amounted to

**UAH 18,248.9 million**



## MOBILE SUBSCRIBERS, THOUSAND SUBSCRIBERS (TOTAL, INCL. PEOPLE)



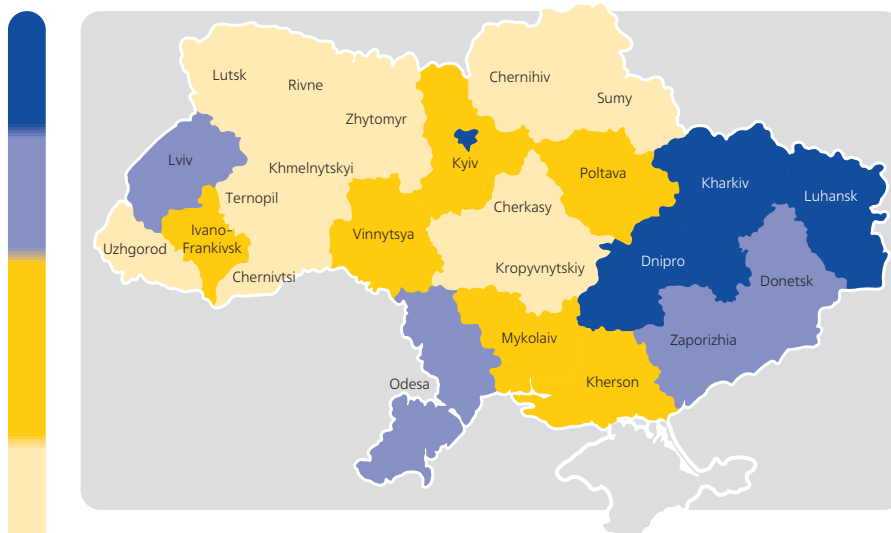
Source: State Statistics Service of Ukraine

As of July 1, 2018, the number of mobile subscribers amounted to **55,028,500**, which is 1.2% less than in the same period of 2017. The number of prepaid subscribers was 42.83% of the total number of subscribers.

The **lowest level** of mobile communication provision is in Ternopil, Khmelnytsky and Chernivtsi regions. The **highest level** of mobile communications provision is in Kyiv city, Donetsk, Dnipro, and Kharkiv regions.

## TOTAL NUMBER OF MOBILE SUBSCRIBERS BY REGIONS, THOUSAND SUBSCRIBERS

Kyiv city	6,148.2
Donetsk region	5,733.5
Dnipro region	4,243.6
Kharkiv region	4,093.1
Odesa region	3,445.0
Luhansk region	3,006.8
Lviv region	2,834.1
Zaporizhia region	2,118.1
Poltava region	1,959.2
Kyiv region	1,802.0
Mykolaiv region	1,625.3
Ivano-Frankivsk region	1,569.0
Kherson region	1,565.4
Vinnitsya region	1,545.2
Sumy region	1,491.1
Zakarpattia region	1,432.0
Chernihiv region	1,337.3
Cherkasy region	1,289.1
Volyn region	1,277.3
Kirovograd region	1,178.6
Zhytomyr region	1,151.9
Rivne region	1,150.4
Chernivtsi region	1,120.9
Khmelnytskyi region	1,027.2
Ternopil region	884.2



The average index of mobile communication provision in Ukraine, per 100 people is

**130.2**

**TOTAL** 55,028.5

Source: State Statistics Service of Ukraine

**MAJOR  
PROBLEMS/  
DIFFICULTIES  
IN THE SECTOR**

- ◇ Inconsistency between Ukrainian Telecommunication Laws and Regulations and the best practices of EU and the Ukraine–European Union Association Agreement:
  - The lack of Mobile number portability service (MNP)
  - The lack of reporting procedure, which is to improve transparency in the market
  - The lack of market definition and market analysis procedure
  - The lack of the Regulator’s powers to regulate markets, except for the market of traffic transfer services.
  - Setting fixed termination rates without considering the equal profitability level for all the operators
- ◇ Dominant operators’ abuse of their dominant position by imposing market prices based on their market power, creating large gap between prices for On-Net and Off-Net calls, forcing other players out of the mobile communication market
- ◇ Groundless increase in the annual rent fee without following any clear and defined methodology of its calculation
- ◇ Inefficient use of investments in 4G network deployment caused by the lack of arrangements for shared use of operators’ infrastructure
- ◇ Excess burden of taxation, including archaic 7.5% tax on the connection service cost for compulsory pension insurance, established as a “luxury tax” in 1999, since a mobile phone was perceived as a luxury attribute at that time
- ◇ Tax discrimination of Ukrainian operators in the field of providing telecommunication services to non-resident operators (export of services)
- ◇ Excessive regulation and high level of related expenditures on the rollout and exploitation of the third and fourth generation networks
- ◇ Inconsistency between Ukrainian Law and EU Law, where the radio frequency resource monitoring is financed from the income gained from radio frequency resource rental payments
- ◇ The lack of efficient mechanism of neutralizing radio interferences from illegal radio electronic devices (tools), which leads to inability to ensure reliable connection
- ◇ Growing dynamics of criminal activity connected with thefts and/or damages of telecom equipment as well as a high level of its latency and low crime clearance rate

**PROSPECTS,  
POSSIBILITIES,  
INNOVATIONS  
IN THE SECTOR**

- ◇ Introduction of a simple and accessible mobile number portability service to ensure the freedom of consumers’ choice
- ◇ Adoption of Draft Law No. 3549-1 contributing to the implementation of the Ukraine–European Union Association Agreement
- ◇ Setting fixed traffic termination rates considering equal profitability level for all the operators in order to stimulate competition in the market, break the barriers, and provide subscribers with real freedom of choice
- ◇ Ensuring effective competition in the mobile communications market by eliminating the abuse of market power
- ◇ Identifying, analyzing and ensuring that there is no abuse of market power in other markets by imposing regulatory obligations where necessary

- ◇ Implementation of separate cost accounting and relevant reporting to increase market transparency
- ◇ Liberalization of the market by removing barriers to entering and operating in the market
- ◇ Liberalization of the market through the application of the best European practices of market taxation
- ◇ Setting rental fee at a reasonable (effective) level and designating the use of income gained from radio frequency resource rental payments for the development of the telecommunication industry
- ◇ Introduction of mandatory registration of subscribers, which will further ease the number portability procedure, speed up the development of innovations and additional financial and administrative services for subscribers as well as alleviate MobileID service launch
- ◇ Abolishment of unreasonable tax loan decrease applied to Ukrainian operators when providing telecommunication services to non-resident operators (export of services). It will lead to the improvement of competitiveness of Ukrainian operators in the international market, improvement of Ukraine's balance of payments as well as drive the rise of GDP
- ◇ Increase of responsibility for damage to telecom networks. The adoption of Draft Law No. 8544 On Amendments to Some Legislative Acts of Ukraine (Regarding the Increase of Responsibility for Intentional Damage to Telecommunication Equipment, Preventing Illegal Enrichment Through Scrap Metal Operations) from July 3, 2018




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*“Today Ukraine is undertaking a digital transformation journey, step by step leveraging benefits of Industry 4.0. And telcos are in the forefront of these dramatic changes, bringing new technologies and reducing a gap between Ukraine and the most technologically advanced countries. 2018 became a remarkable year for the market, having experienced positive changes toward its liberalization and development, like LTE technology implementation, the NCCR decision on MTR decrease (from UAH 0.15 to 0.12 per minute) coming into force on January 1, 2019, and setting the date of MNP service launch.*

*Following global trends, a shift in the importance of various services can be noted today: from wired networks to mobile networks and from voice services to data services. Ukrainian mobile operator is no longer a telephone tool. In March lifecell was the first to introduce the 4.5G to Ukrainians. Today we lead in terms of geographical and population LTE coverage and have the largest data-driven services portfolio to enhance almost any entity, either product or process, with digital capabilities that boost their value.*

*However, to provide those services to corporate and individual consumers, the company constantly needs to overcome barriers created by the lack of fair competitive environment. Despite some positive changes taking place in the recent years, Ukrainian telecom market still suffers from abuse of dominant market power, the lack of market regulation and the lack of freedom of consumer's choice. Everyone loses in such circumstances: consumers, operators, economy. Though I'm strongly convinced that these problems can be solved in the nearest future by conducting a scrupulous revision of current regulatory processes and putting Ukrainian Telecommunication Laws and Regulations in line with the Ukraine–European Union Association Agreement.”*

**Ismet Yazici, Chief Executive Officer**

# 10

## **CELEBRATING A DECADE OF SUCCESS IN UKRAINE**

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# KYIV OFFICE MARKET

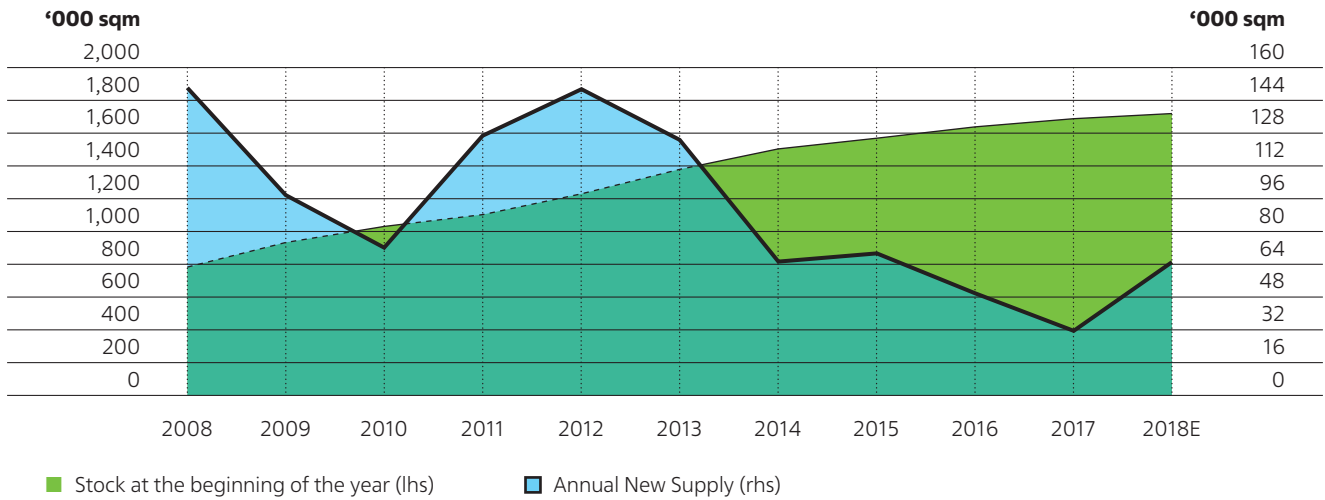


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## KEY TRENDS

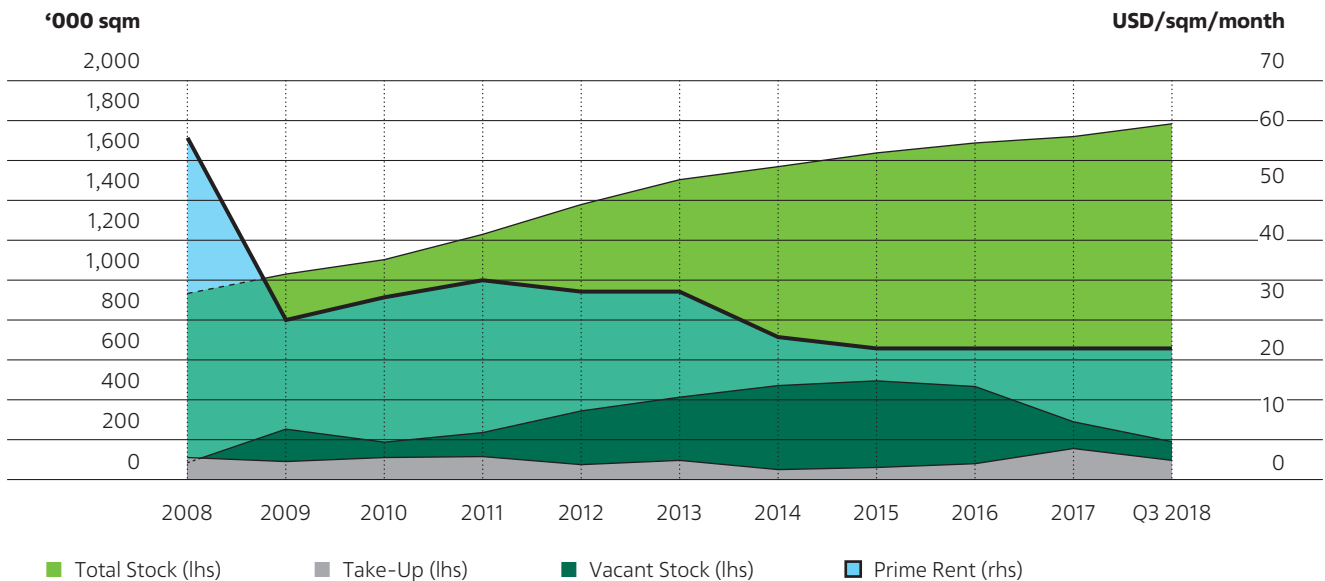
- ◇ Take-up volume reached ca. 96,000 sqm (+20% y-o-y) in Q1–Q3 2018
- ◇ Total competitive stock increased to 1.73mio sqm (+0.6% YTD) as of the end of Q3 2018. New market supply in Q1–Q3 2018 reached 9,200 sqm (–70% y-o-y) represented by the delivery of 1,600 sqm in Podil Heritage BC, 5,700 sqm in Maidan Plaza BC, and 2,200 sqm of a building within Phase 1 of Unit City Business Park
- ◇ Average vacancy decreased by –6.5pp YTD to 10.5% as of the end of Q3 2018, impacted by sustained occupier interest coupled with limited development completions
- ◇ Prime effective rent stood at \$23/sqm/month (0% YTD) as of the end of Q3 2018

## KYIV ANNUAL DEVELOPMENT COMPLETIONS AND TOTAL COMPETITIVE STOCK, '000 SQM



lhs – left hand side; rhs – right hand side; E – estimate. Source: CBRE Ukraine

## OFFICE MARKET FUNDAMENTALS



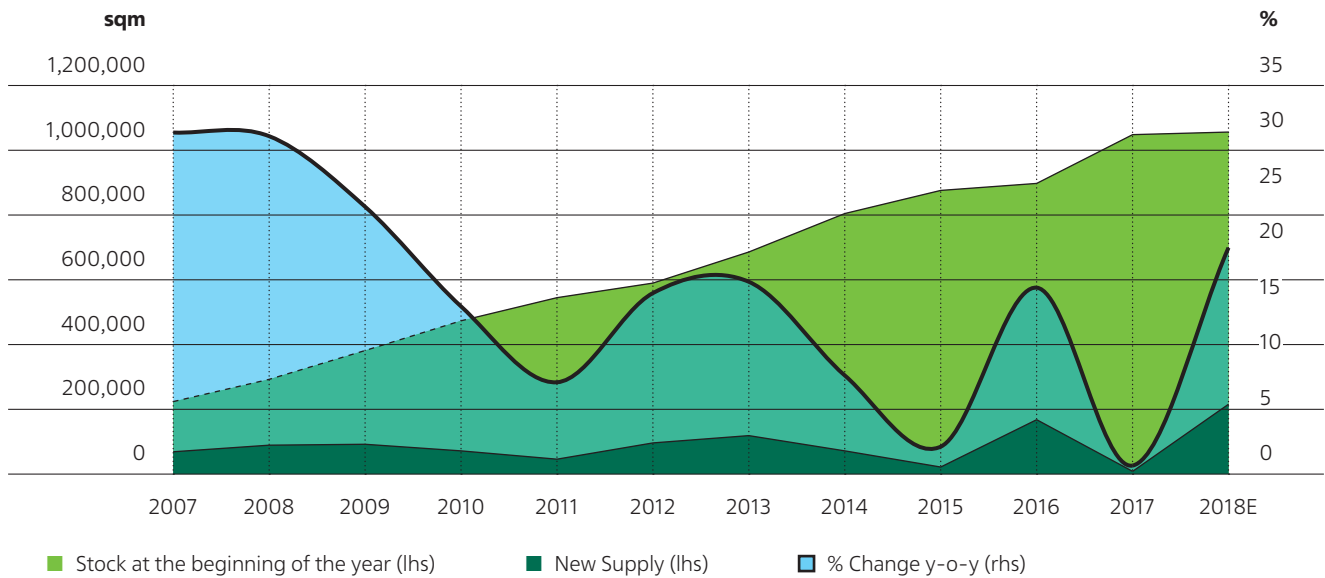
lhs – left hand side; rhs – right hand side. Source: CBRE Ukraine

# KYIV RETAIL MARKET

## KEY TRENDS

- ◇ Kyiv retail turnover growth stayed positive (+2.5% y-o-y) despite comparably sluggish growth associated with the uncertainty around pre-election period and devaluation expectations. Consumer spending growth was positively adjusted by a +10.4% y-o-y increase in real wages as of Q3 2018
- ◇ New shopping center supply over Q1–Q3 2018 equaled 47,000 sqm represented by Rive Gauche Phase 1 (20,500 sqm), Smart Plaza Polytech (15,000 sqm), and the first retail park in Ukraine – Retail Park Petrivka (11,000 sqm). Hence, the total stock grew to 1.1mio sqm (ca. +3.6% YTD)
- ◇ Average vacancy decreased to 3.5% (–1.5pp YTD) as of Q3 2018, as the newly delivered schemes entered the market almost fully occupied and existing retailers continued to expand their brands
- ◇ Prime rental range increased by +8%–10% YTD to \$65–\$95/sqm/month as of Q3 2018, while secondary rents ranged from \$32 to \$50/sqm/month, as the upper bound of the range appreciated by 10% YTD

## KYIV SHOPPING CENTER STOCK, SQM



## CROSS-BORDER MARKET ENTRY IN KYIV SHOPPING CENTERS IN Q1–Q3 2018

GULLIVER SC	Zara Home Daniel Hechter, Kilian, Jo Malone	Homeware & Department Stores Luxury & Business
COSMOPOLIT SC	Antony Morato	Mid-Range Fashion
GLOBUS SC	DeFacto	Mid-Range Fashion
LAVINA MALL SC	H&M, Koton	Mid-Range Fashion
MANDARIN PLAZA SC	Santoni	Luxury & Business
OCEAN PLAZA SC	All Saints, Emporio Armani, Ted Baker	Luxury & Business
PLAZMA SC	Alpina	Specialist Clothing
SKY MALL SC	HUGO	Luxury & Business

Source: CBRE Ukraine

# KYIV HOTEL MARKET

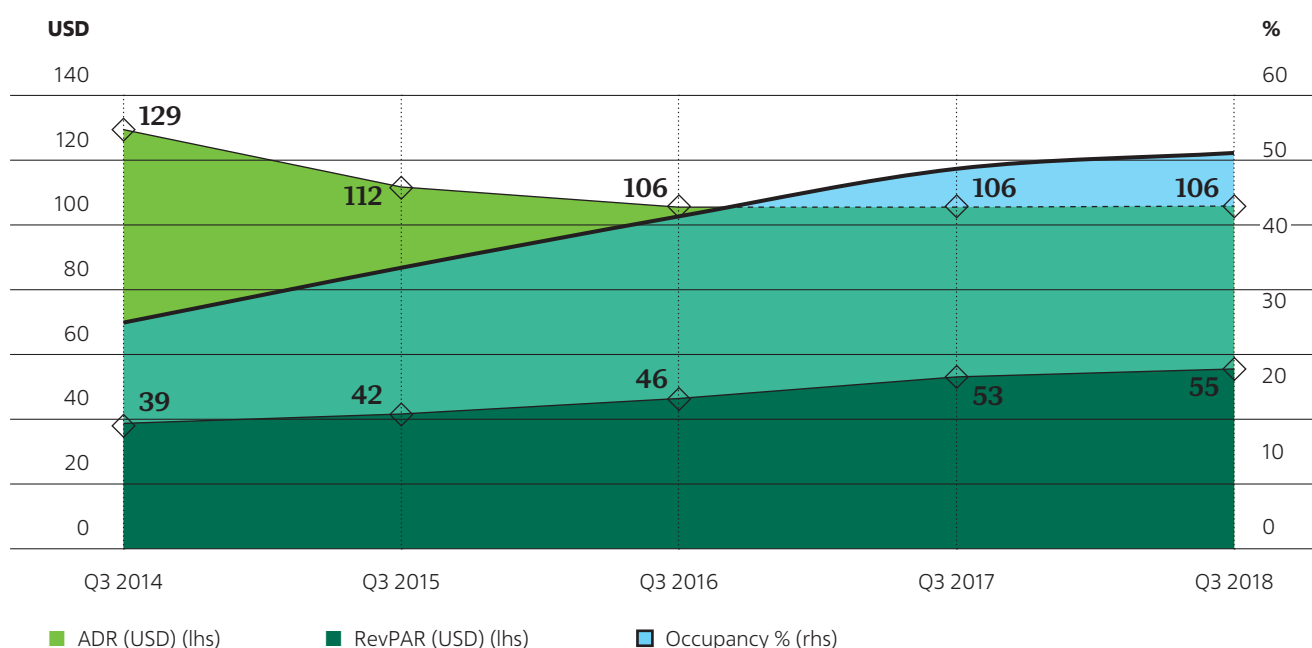
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## KEY TRENDS

- ◇ In Q1–Q3 2018, the total hotel room stock grew by 757 keys (+7% YTD) taking the total key count to ca. 10,800 keys
- ◇ Average hotel occupancy on the market registered a +2.1 pp y-o-y growth to 52.4%, as the market benefited from growing inbound arrivals associated with event-driven tourism and business-driven tourism in Q1–Q3 2018
- ◇ In Q1–Q3 2018, ADR of the quality hotel stock reached \$106 YTD (+0.3% y-o-y), whilst RevPAR increased to \$55.5 YTD (+4.6% y-o-y). Improvements in USD-denominated RevPAR in luxury, upper midscale, and upscale segments were driven by growth in ADR, whilst RevPAR in economy and midscale segments was, for the most part, due to higher occupancy levels

## SELECTED KPIS OF KYIV QUALITY HOTEL STOCK AS OF Q3 2018



lhs – left hand side; rhs – right hand side. Source: CBRE Ukraine



“During the 10-year presence on the market we witnessed commercial real estate go through peaks and troughs in response to broader macroeconomic and political influences. During this time real estate market has undergone qualitative transformation, during which the market size has nearly doubled, a number of key players appeared, with some leaving the stage, and regional markets began to emerge. In 2018, Ukrainian economy and real estate market displayed positive upward dynamics, evident in growing employment and rising wages, as well as increasing rental rates and declining vacancy indicators across all real estate segments. Occupier sentiment in the office market firmed up as businesses were more active in pursuing expansion strategies, particularly in the industries of IT and Business Services. Similarly, the retail market benefited from an uptake in consumption, which served as a stimulus for attracting some notable international entries. The considerable decrease in vacancy and rising rents are likely to act as catalysts for new development activity, although many new projects are still held back by the absence of debt financing. Nonetheless, with the global economy strong and value-added opportunities in developed markets scant, Ukraine is well poised for a growth cycle, as political and economic risks continue to subside.”

**Sergiy Sergiyenko, Managing Partner, CBRE Ukraine**

# OFFICE MARKET IN MAJOR CITIES OF UKRAINE

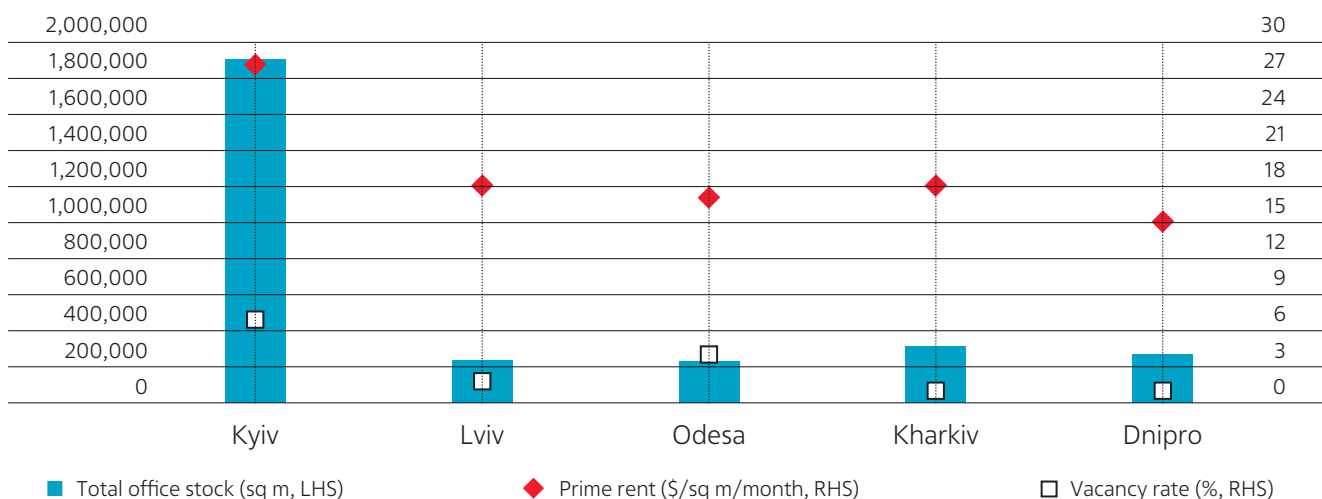
## KEY TRENDS

- ◇ In Ukraine the highest dynamics on the office property market has been registered in Kyiv, which started developing in 1993. During 2007–2008, the office property markets also started actively developing in major regional cities of the country, particularly in Odesa, Dnipro, Kharkiv, and Lviv, as well as Donetsk. However, in late 2008 to mid-2009, the construction of many new office schemes across Ukraine was suspended due to the deficit of debt finance and economic decline
- ◇ Despite the demand strengthened through a continued growth of the IT sector and BPO operations and very low vacancy levels, development activity in the office property sector in major regional cities of Ukraine currently remains suppressed. Nevertheless, in view of the improved market dynamics, many developers are now increasingly reconsidering new activities in major cities of Ukraine, whilst in Kyiv and Lviv, several larger-scale office developments were initiated during 2018
- ◇ Cushman & Wakefield projects that, other things being equal, new supply in the sector is likely to remain low until 2020–2021, and any new quality office space is likely to be absorbed by the market relatively quickly

	KYIV	LVIV	ODESA	KHARKIV	DNIPRO
Total office stock (GLA), mln sq m	1.90	0.24	0.23	0.31	0.27
Prime office rents (triple net), \$/sq m/month	20–28	12–19	14–17	12–18	10–14
Prime office vacancy	7%	2%	4%	1%	1%
Official population, mln inhabitants	2.94	0.76	1.01	1.44	1.00

Source: Cushman & Wakefield, State Statistics Committee of Ukraine

## MAJOR INDICATORS OF THE OFFICE PROPERTY MARKETS IN KYIV AND OTHER MAJOR CITIES OF UKRAINE, Q3 2018

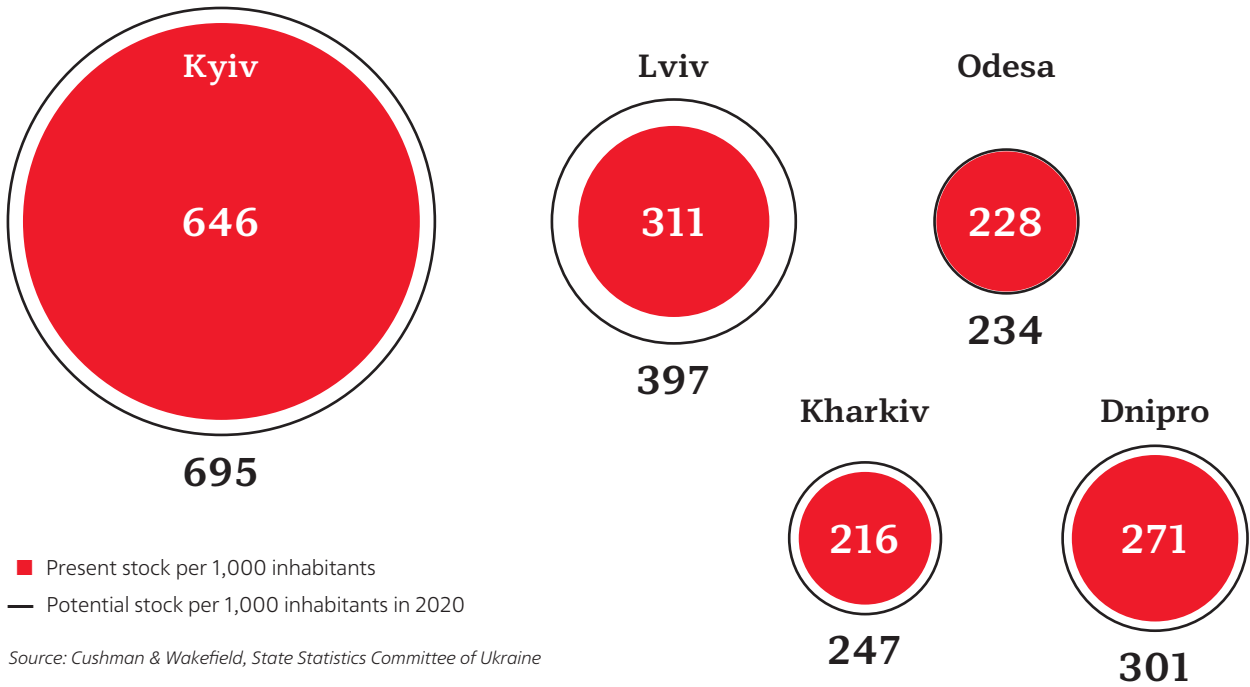


Source: Cushman & Wakefield

LHS – left hand side, RHS – right hand side

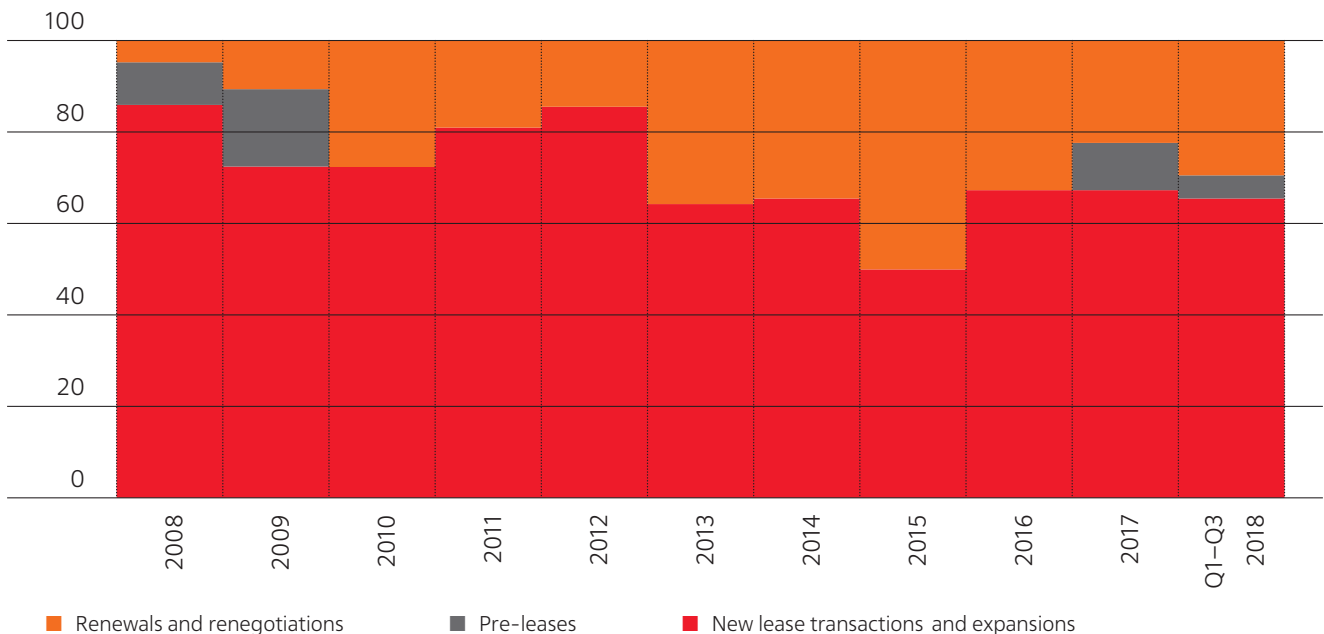


**PRESENT AND FORECASTED OFFICE STOCK FOR MAJOR REGIONAL CITIES PER 1,000 INHABITANTS, SQ M**



In 2017 and during the first three quarters of 2018, relocation and new leases made up around 66% of all lease transactions in the office property sector in Kyiv, while renewals and renegotiations accounted for approximately 26% of the figure. Significantly, around 8% of the take-up during the period was formed by pre-leases, which were absent in the office property market in Kyiv during the period from 2009 until Q1 2017. In view of a very low availability, office occupiers in the major regional cities of Ukraine are increasingly considering pre-leases as an acceptable option.

**THE OFFICE LEASE TRANSACTIONS BY TYPE IN KYIV, %**





100 years in the  
W O R L D 25 years in  
U K R A I N E

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**Brokerage company of the year 2016 and 2017 in Ukraine**  
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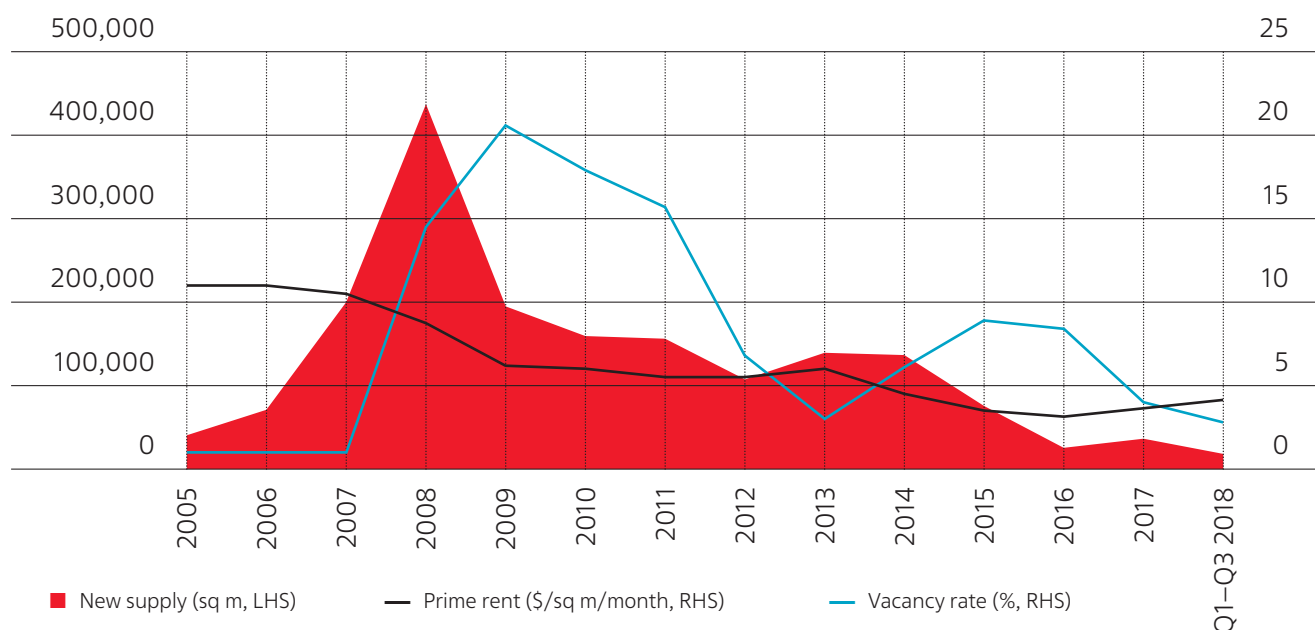
# WAREHOUSING PROPERTY MARKET IN KYIV REGION



## KEY TRENDS

- ◇ Following two years of low development activity in the sector, total new supply in Q1–Q3 2018 amounted to only around 18,400 sq m (+53% yoy) with total stock reaching 1.9 million sq m. Delivery of several pipeline schemes in the sector was postponed until Q1 2019
- ◇ Occupier demand in the sector remains relatively strong, mainly driven by retail companies, logistics and transportation service providers, as well as manufacturing and distribution companies in the pharmaceutical and FMCG sectors
  - The take-up amounted to 153,500 sq m in Q1–Q3 2018, which is +6% yoy and +45% compared to Q1–Q3 2016
- ◇ Primary vacancy shrank from 8.4% at the end of 2016 to 2.8% in Q3 2018 (–67%), whilst prime base rents increased from \$2–4/sq m/month in late 2016 to \$3.5–5.0/sq m/month in Q3 2018 (+38%). Base rents are indicated net of VAT and service charge

## KEY INDICATORS FOR THE WAREHOUSE AND LOGISTICS PROPERTY MARKET IN THE GREATER KYIV AREA\*



	2016	2017	Q1–Q3 2018	Annual outlook
Stock (sq m)	1,816,790	1,853,290	1,871,652	Δ
New supply (sq m)	25,300	36,500	18,360	← → / Δ
Take up (sq m)	116,190	190,115	153,500	← → / Δ
Vacancy rate (%)	8.4	4.0	2.8	∇
Prime rents (USD/sq m/month)	2–4	2.8–4.2	3.5–5.0	Δ

Source: Cushman & Wakefield

Note: All figures are provided as of the end of the period.

Take-up and vacancy figures do not include sub-lease opportunities.

\* Including ancillary office and mezzanine space  
LHS – left hand side; RHS – right hand side

# REAL ESTATE INVESTMENTS

## KEY TRENDS

- ◇ 2018 was marked by further improvement of market sentiment and actual transactional dynamics in the investment market. This was driven by continued currency stability, improved dynamics of the commercial property markets in Ukraine, and an increasing number of local companies seeking to deploy accrued equity into real estate both as purely income producing investments and for owner occupation
- ◇ We project that in 2018, the total annual volume of secondary investment transactions in the commercial property market in Ukraine may exceed USD 400 million with around USD 313 million already allocated during the first ten months of the year
- ◇ In 2018, further yield compression was witnessed on the commercial property market in Kyiv, due to common expectations of economic stabilisation in Ukraine with return to economic growth and increasing investment demand. By the end of Q3 2018, prime initial yields for office and retail space in Kyiv decreased to 12% and 12.25% respectively, and for prime logistics properties, they were around 12.75%

## TOTAL VOLUME OF TRANSACTIONS

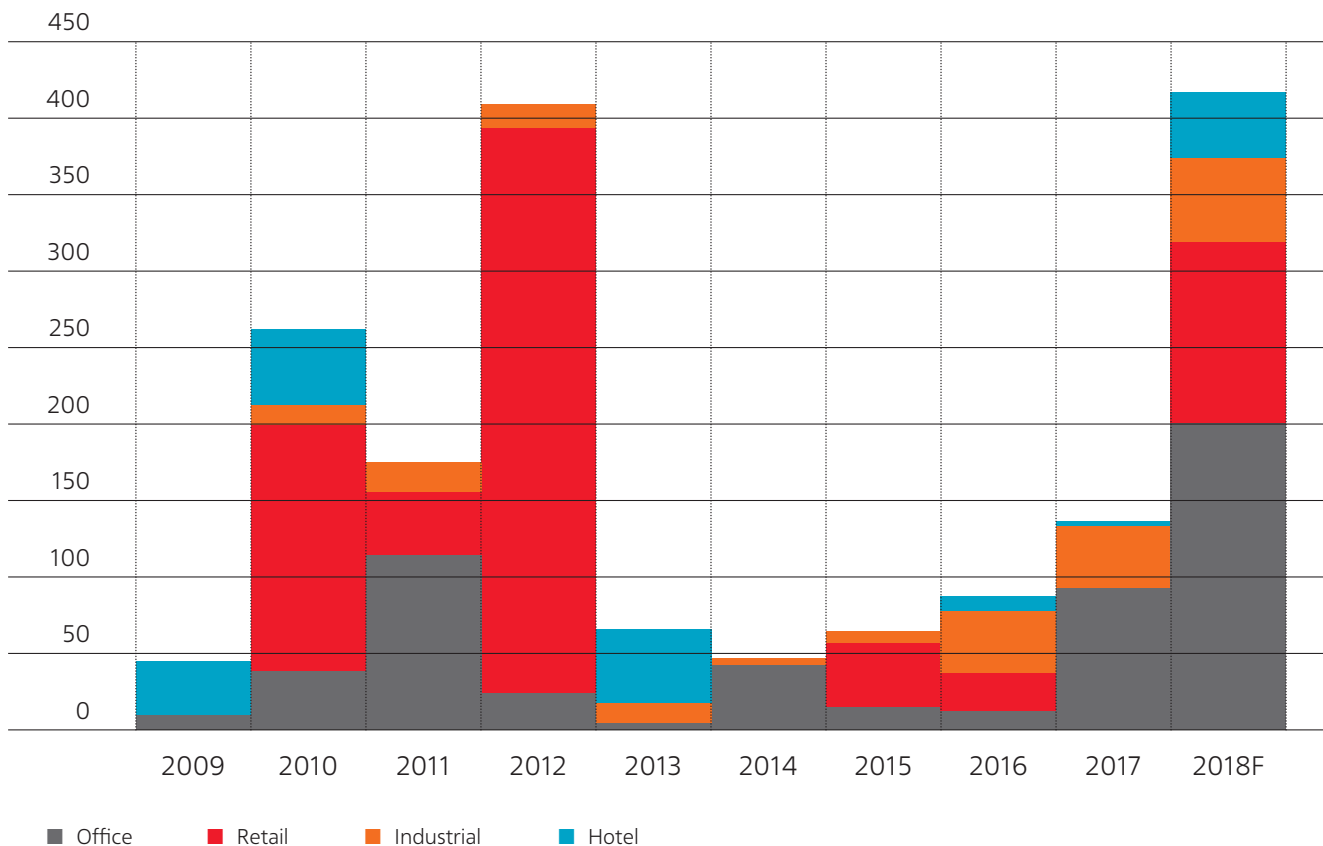
Q1–Q3 2018 VS 2017

**\$313 million**



**+132%**

## INVESTMENT VOLUME ON THE COMMERCIAL PROPERTY MARKET IN UKRAINE\*, USD MILLION

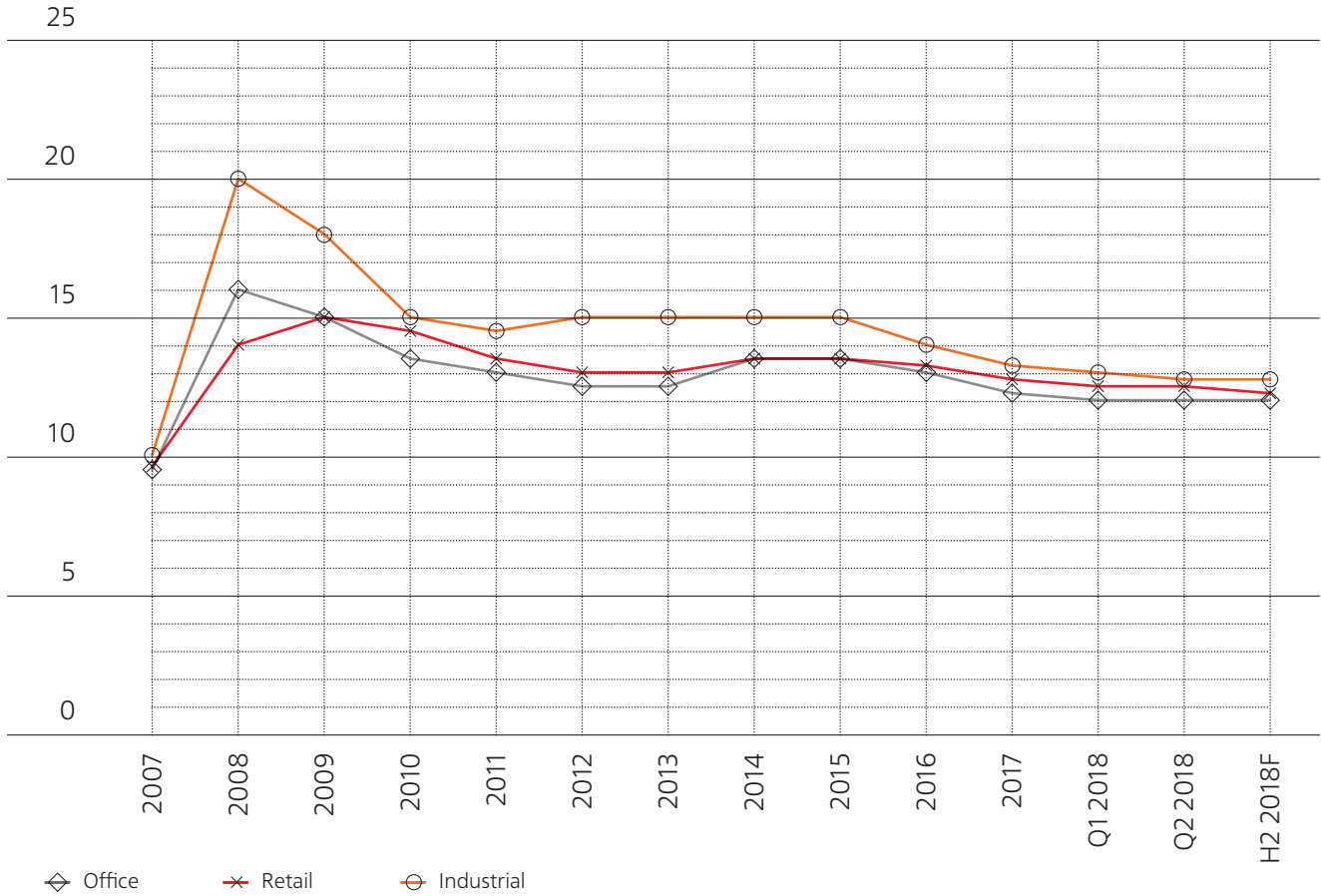


Source: Cushman & Wakefield

\* The figure includes secondary investment transactions of value over USD 1 million (the sale of land plots was excluded). All figures are period-end

F – Forecast

### PRIME YIELDS ON THE COMMERCIAL PROPERTY MARKET IN KYIV AND ITS SUBURBS, %



Source: Cushman & Wakefield  
F – Forecast

Note: All figures are period-end



“Occupier demand in offices, retail and logistics markets throughout Ukraine has strengthened throughout the year and, there are now signs that lack of available supply is hindering some relocation and expansion plans.

Pipeline delivery, though increasing, remains constrained, resulting in office vacancy levels in Kyiv and the key regional cities being at historic lows not witnessed since 2008. This is having the effect of driving up rents, a trend that is likely to continue in the short to medium term.

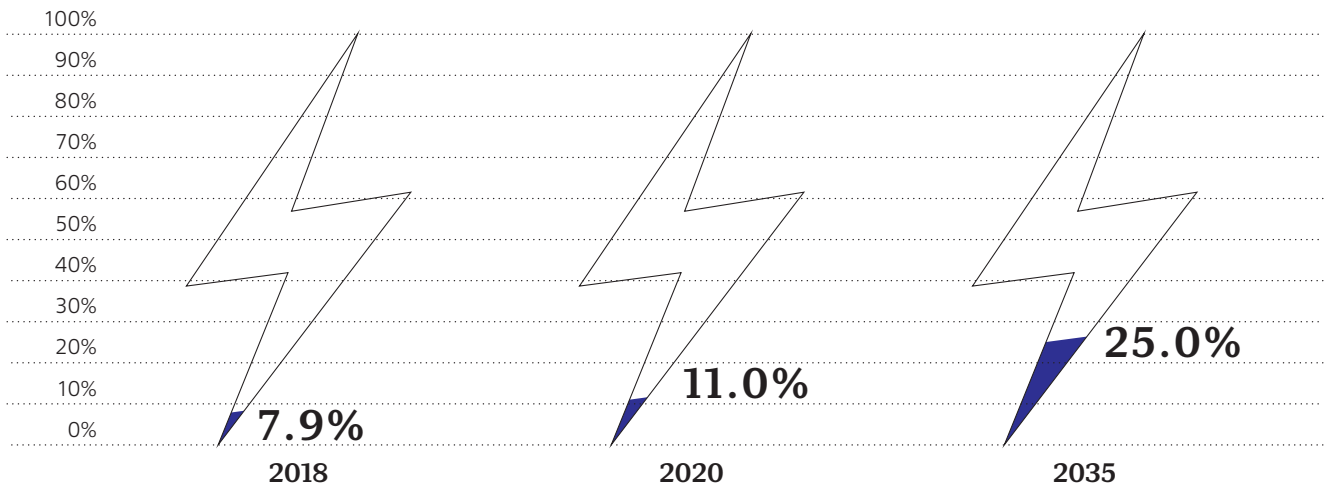
Of a particular note are plans for new office parks planned in Kyiv, Lviv and Kharkiv where the growing IT market is driving demand for new high quality space. Indications are also becoming apparent of developers considering future logistics development with a number of development sites having been acquired during the year.

2018 witnessed a material increase in investment activity throughout all commercial real estate sectors with investment transactions up by over 130% from 2017 levels and anticipated to be at or over USD 400 million by the year end. The increase in demand for the purchase of assets has compressed yields which, coupled with rising rents, have led to increasing capital values. Cushman & Wakefield projects a continuation of this trend.”

**Nick Cotton, Managing Director,  
Cushman & Wakefield in Ukraine**

# THE PRODUCTION OF GREEN POWER ENERGY IN UKRAINE: DIFFICULTIES AND INNOVATIONS

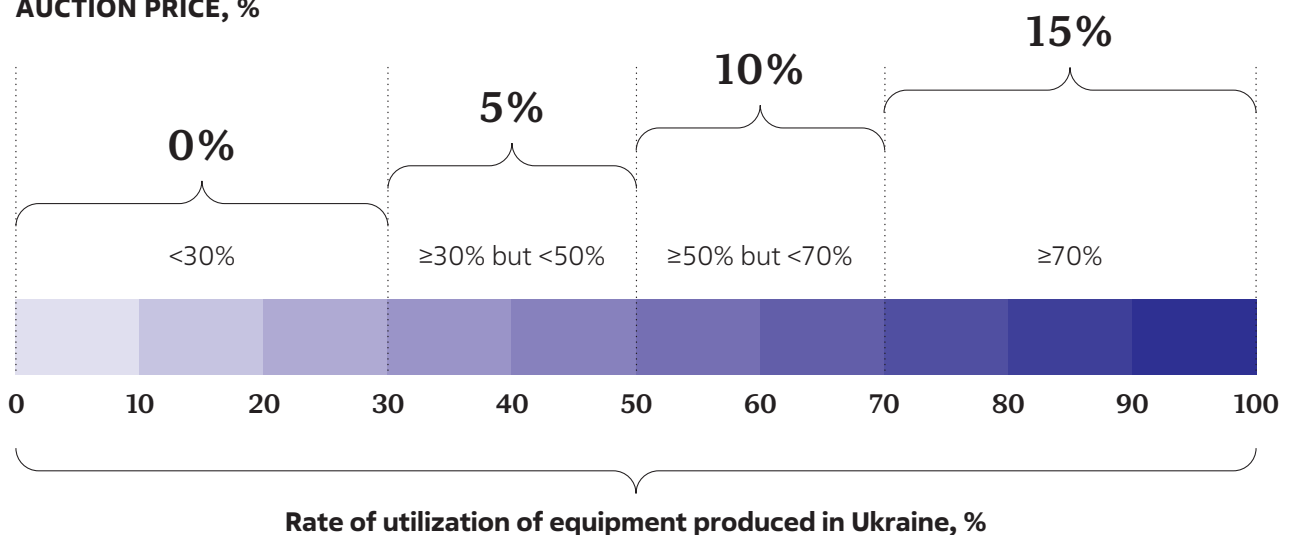
## PLANNED INCREASING OF RENEWABLE ENERGY SHARE IN THE ENERGY BALANCE OF UKRAINE



## INNOVATIONS

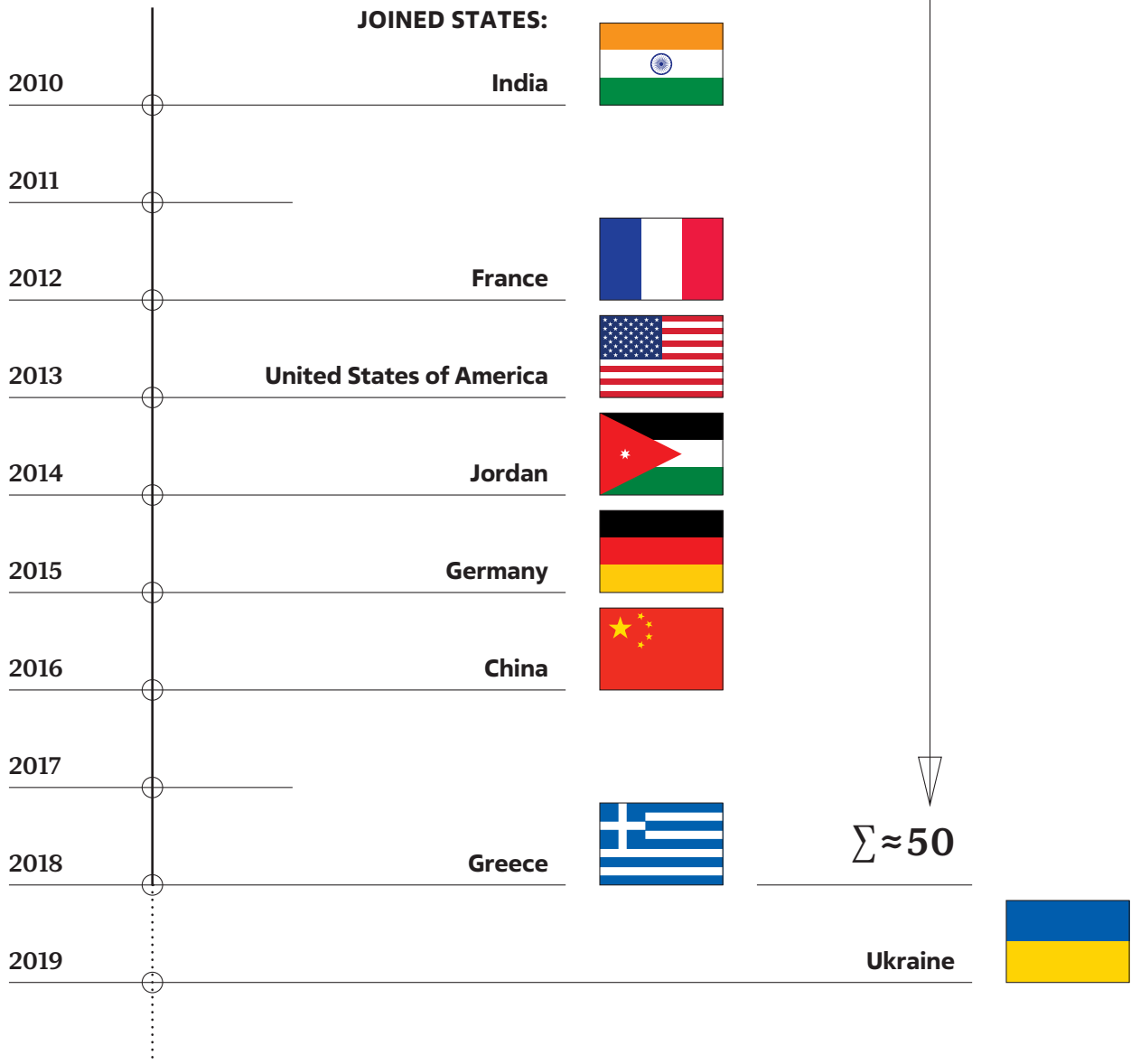
- ◇ Establishment of the auction system for selling and purchasing renewable energy
- ◇ Guaranteed purchase of renewable energy produced by the auction winner
- ◇ Guaranteed provision of the winner with state support for twenty years since the agreement on the sale and purchase of produced renewable energy is entered into by and between the winner and a guaranteed purchaser
- ◇ Increase of power generation quota for private households (from 30 kW to 500 kW)
- ◇ Allowances to “feed-in” tariff for the utilization of equipment produced in Ukraine are preserved

## RATE OF ALLOWANCES TO “FEED-IN” TARIFF, AUCTION PRICE, %



### WORLD PRACTICE OF HOLDING AUCTIONS

As of the end of 2018, there are **almost 50 countries**, which share the practice of holding auctions for selling and purchasing renewable energy



### EXPECTED DRAWBACKS

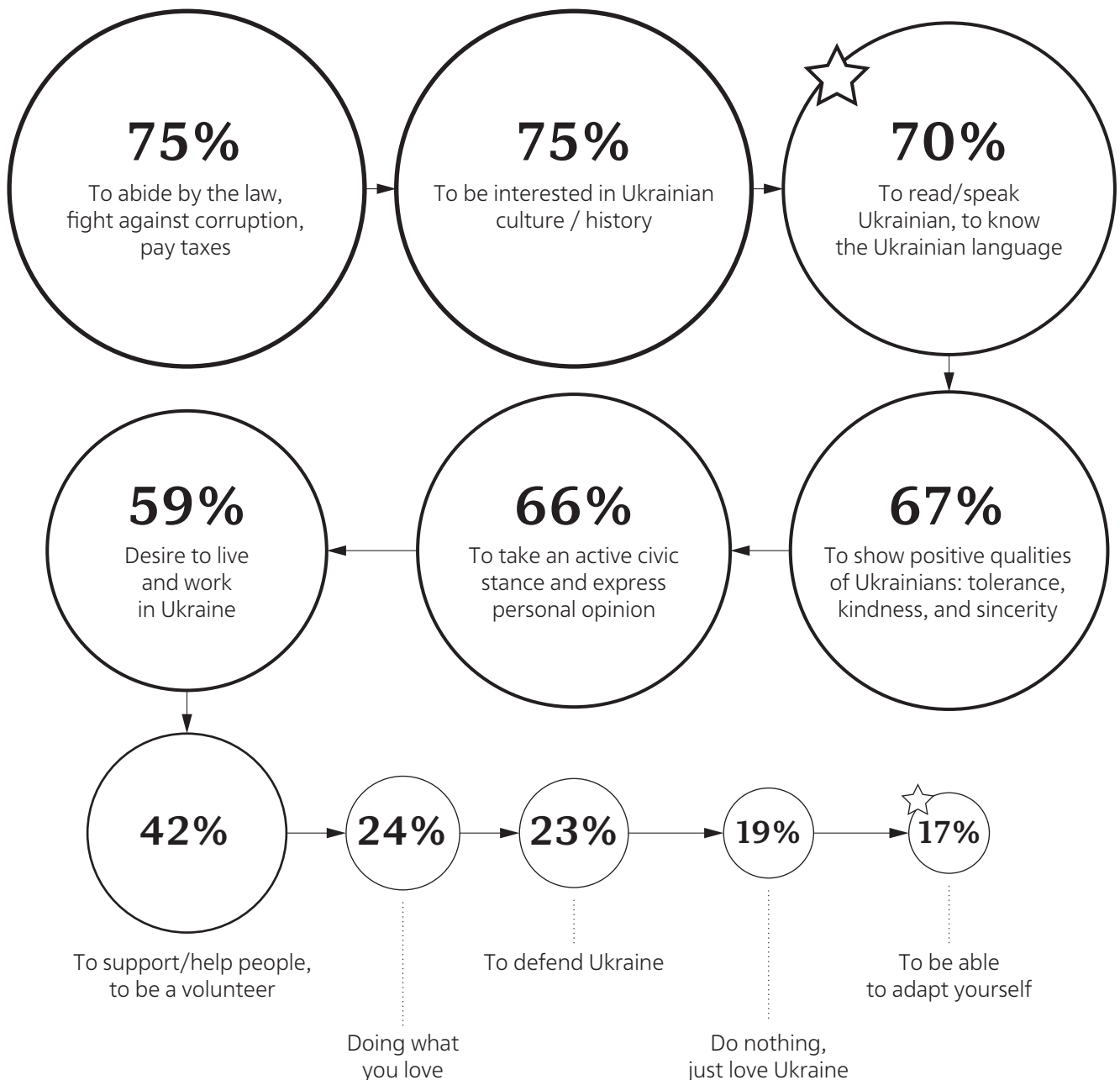
- ◇ Reduction of “feed-in” tariff:
  - 30% for solar power plants
  - 10% for wind power plants
- ◇ Compulsory participation in the auction for solar power plants, which are expected to produce more than 10 MW and for wind power plants which are expected to produce more than 20 MW
- ◇ Compulsory payment of bank security in the amount of USD 50,000 per 1 lot (1 MW) in order to take part in the auction
- ◇ The winner shall be the investor who offers the lowest price for 1 MW of produced energy

# “TO BE A UKRAINIAN TODAY” RESEARCH PROJECT

In 2018, UMG, together with the Ministry of Information Policy, presented the second wave of “To Be a Ukrainian Today” research project (a survey among the residents of the largest cities in Ukraine, 16+).

To be a Ukrainian today is to have an active life stance. “Ukrainianness” is no longer a demonstration and emotional impulse, but a conscious position. Love for the country has to be supported by actions and every-one has to start with themselves.

## UKRAINIAN TODAY = ACTIVE ATTITUDE TO LIFE

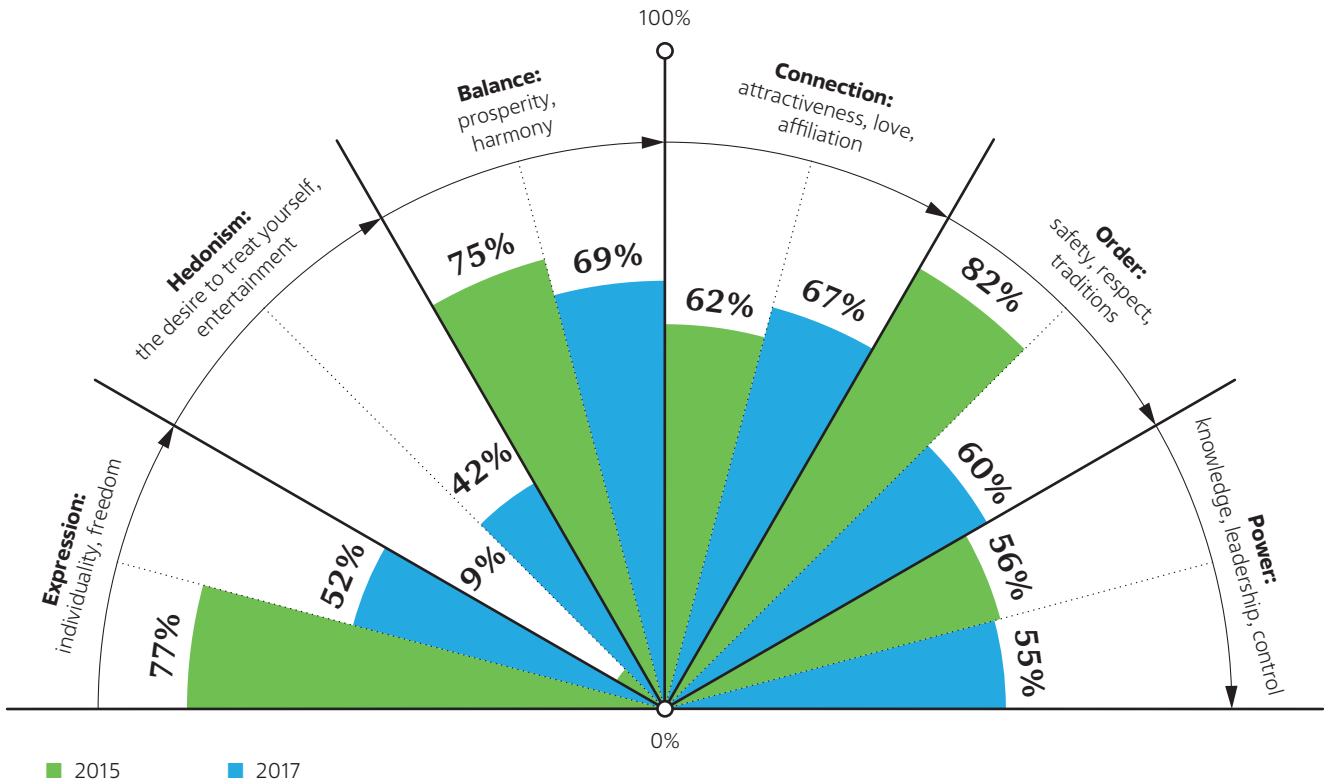






**UKRAINIANS: YESTERDAY AND TODAY NEEDS**

After the distortions of 2015, the hierarchy of needs is gradually coming back to the European norm, where well-being, harmony, and love are no less important than security and freedom.



Sources: UMG, Ministry of Information Policy

**PESSIMISTS AND OPTIMISTS**

Ukrainians see the situation in the country much clearer than in 2015: pessimists do exist, however, **the number of optimists has grown significantly** – fourfold, while the number of “pessimists” has not changed.

**Reasons for optimism:** pride for the nation in general, patriotism, heroism of the army, and cultural heritage.

**BETRAYAL AND VICTORY**

Most reforms and the situation with the exchange rate are perceived as **betrayal**. The reason is simple – people do not understand the meaning of a particular reform and do not realize the direct and selfish benefits for them personally.

**Victory** is a visa-free regime, participation of Ukrainians in the Invictus Games, the Eurovision Song Contest, and the Champions League Final in Kyiv. However, all this is taken for granted, as it corresponds to the European course of the state and has no such personal effect as reforms and the dollar exchange rate.

**INTERNAL LOCUS OF CONTROL!**

We are becoming independent and starting to get rid of the post-Soviet complex of a “little man” who, unwilling to make an effort, accuses the system of everything that is happening.

Today, **84% of Ukrainians count on their own** or immediate surrounding. It pushes Ukrainians to self-development, with a pragmatic goal of earning more.

### **MOST DO NOT HAVE THE FINANCIAL FREEDOM**

Of the three important kinds of freedom, Ukrainians have two: freedom to express their own point of view and freedom of choice and desires. However, most do not have the financial freedom to embody their own desires.

At the beginning of 2018, **57% were forced to “break piggy banks”** and spend old savings. Almost every third Ukrainian had no opportunity for new regular savings and replenishing of the “piggy bank.”

### **UKRAINIANS DO NOT WANT TO ECONOMIZE**

Ukrainians of today do not want to economize; they are maximally focused on finding opportunities to earn more. For “basic comfort”, a Ukrainian urban citizen needs an average of **UAH 17,000 per capita** a month.

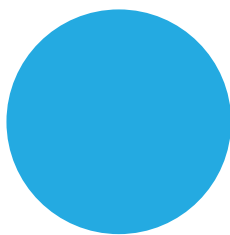
### **THE UKRAINIANS’ FINANCIAL MATTER AND GOING ABROAD**

The financial matter pushes Ukrainians to consider going abroad. 37% of the urban population want to leave Ukraine to never return; 28% are ready to leave for a certain period and then to return. However, 35% do not think about leaving the country; half of them are real patriots, and half are rather “compelled” to because of their families and responsibilities, lack of qualification or knowledge of languages, or simply because they are afraid of changes.

### **DAY-OFF HEDONISM**

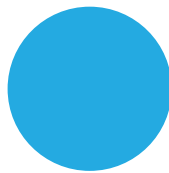
Ukrainians are tired of living in a state of constant saving, and have a need for stress sublimation. The desire to “live right here, right now” rather than “sometime in a distant future” has created a “day-off hedonism.” 69% of Ukrainians from big cities deliberately choose a day to relax and reward themselves for limitations throughout the week.

### **WHAT DO UKRAINIANS DREAM ABOUT?**



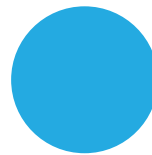
**26%**

Peace, safe country



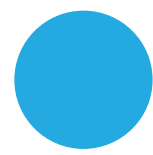
**19%**

Wealth



**17%**

To see the world



**16%**

Prosperity



**12%**

Stability



**9%**

Good work/career



**9%**

Healthy family



**8%**

Highly developed country



**6%**

Love



**5%**

United family



**5%**

Happiness



**5%**

To be more educated



# INNOVATIVE MARKET RESEARCH

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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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Live for the story\_

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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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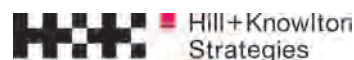
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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)

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as of December 15th, 2018 — updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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Group Country Manager for CIS  
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[info@volia.com](mailto:info@volia.com)  
[www.volia.com](http://www.volia.com)  
Chief Executive Officer:  
Gyorgy Zsembery



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Phone: +380 (44) 207-0299  
Fax: +380 (44) 207-0299  
[info@vseswit.com.ua](mailto:info@vseswit.com.ua)  
[www.vseswit.com.ua](http://www.vseswit.com.ua)  
Director:  
Yaroslav Savchenko

## Ward Howell Ukraine

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Fax: +380 (44) 377-7751  
[info-ua@wardhowell.com](mailto:info-ua@wardhowell.com)  
[www.wardhowell.com](http://www.wardhowell.com)  
Partner:  
Igor Kabuzenko



## WATSONS

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Fax: +380 (44) 423-0710  
[info@watsons.ua](mailto:info@watsons.ua)  
[www.watsons.ua](http://www.watsons.ua)  
General Director:  
Tomasz Wroblewski

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### Westinghouse Electric Company

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office 6, Kyiv 01001  
Fax: +380 (44) 230-2662  
merkuls@partners.  
westinghouse.com  
www.westinghousenuclear.com  
Customer Account Manager:  
Per-Olof Siberg



### WHIRLPOOL UKRAINE LLC

4 Mytropolyyta Andriya  
Sheptytskoho St., Business Center  
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Phone: +380 (44) 494-3611  
Fax: +380 (44) 494-3611  
www.whirlpool.com.ua  
General Director:  
Sergiy Lozhkin



### Willis Insurance Brokers Limited (member of Willis Towers Watson Group)

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Fax: +380 (44) 461-9952  
Vyacheslav.andriykov@  
willistowerswatson.com  
www.willistowerswatson.com  
General Director:  
Vyacheslav Andriyko



### Winner Imports Ukraine, Ltd.

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Kapitanivka village,  
Kyiv-Svyatoshyn district 08112  
Phone: +380 (44) 585-6300  
Fax: +380 (44) 585-6301  
corpcomms@winner.ua  
www.winner.ua  
Head of the Management Board:  
Petro Rondiak



### Winner Leasing

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Kapitanivka village,  
Kyiv-Svyatoshyn district 08112  
Phone: +380 (44) 585-6300  
Fax: +380 (44) 585-6301  
akaminskyi@winner.ua  
www.winnerleasing.com.ua  
Director:  
Anton Kaminskyi



### Wooden Horse Strategies LLC

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Phone: +380 (67) 466-5737  
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Brian@brianmefford.net  
www.woodenhorse.co  
Owner:  
Brian Mefford



### WorldAPP, Inc.

14A Ihorivska St., P.O. Box 166,  
Kyiv 04070  
Phone: +380 (44) 599-2638  
Fax: +380 (44) 599-2638  
info@worldapp.com  
www.worldapp.com  
Head of Representation:  
Natalia Fedotova



### X.COMMERCE DEVELOPMENT CENTER LLC

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Kyiv 04080  
Phone: +380 (44) 461-1656  
Fax: +380 (44) 591-1657  
ka@magento.com  
ua.magento.com  
General Director:  
Maxim Zakharov



### Xcoal Energy & Resources

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Fax: +17 (245) 536-475  
xcoal@xcoal.com  
www.xcoal.com  
Chief Executive Officer:  
Ernie Thrasher



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Business Center "Forum Park Plaza",  
block 4V, office 4/204,  
Kyiv 04073  
Phone: +380 (44) 201-2031  
Fax: +380 (44) 201-2030  
www.xerox.ua  
General Manager:  
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### YOUCONTROL LTD

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Phone: +380 (80) 030-9077  
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mail@youcontrol.com.ua  
www.youcontrol.com.ua  
CEO:  
Sergiy Milman



### Zakhidnadraservis LLC

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Fax: +380 (32) 261-0650  
info@gaz.net.ua  
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Director:  
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as of December 15th, 2018 – updated Members List can be found at: [www.chamber.ua](http://www.chamber.ua)



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[www.zinteco.com](http://www.zinteco.com)  
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Stanislav Kushpitovsky

# EMBASSIES AND CONSULATES IN UKRAINE

as of December 15<sup>th</sup>, 2018



## Embassy of Australia

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AustEmbKyiv@dfat.gov.au  
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## Embassy of Libya

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Fax: +380 (44) 238-6068  
libyan-embassy\_kiev@ukr.net



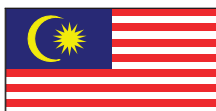
## Embassy of the Czech Republic

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kyiv@embassy.mzv.cz  
www.mzv.cz/kiev



## Embassy of Canada

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Fax: +380 (44) 590-3134  
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www.kyiv.gc.ca



## Embassy of Malaysia

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Fax.: +380 (44) 285-5238  
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www.kln.gov.my/web  
ukr\_kiev/home



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## Embassy of the Federal Republic of Nigeria

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## Embassy of Georgia

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# EMBASSIES AND CONSULATES IN UKRAINE

as of December 15<sup>th</sup>, 2018



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parepkiv@gmail.com  
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country/id/88



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ambelkiev@ukrpost.net  
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**Embassy of the Kingdom of Norway**  
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emb.kyiv@mfa.no  
www.norway.no/en/ukraine



**Embassy of the Kingdom of Saudi Arabia**  
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Fax: +380 (44) 520-5177  
uaemb@mofa.gov.sa  
www.mfa.gov.ua/en/index/  
country/id/98



**Embassy of the Kingdom of Spain**  
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Fax: +380 (44) 521-0717  
emb.kiev.cons@maec.es  
www.exteriores.gob.es/  
embajadas/kiev



**Embassy of the Kingdom of Sweden**  
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ambassaden.kiev@gov.se  
www.swedenabroad.se



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www.ua.chineseembassy.org



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armukraineembassy@mfa.am  
[www.mfa.gov.ua/en/index/country/id/7](http://www.mfa.gov.ua/en/index/country/id/7)


**Embassy of the  
Republic of Austria**

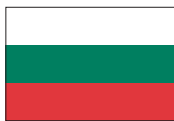
33 Ivana Franka St.,  
Kyiv 01901  
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Fax: +380 (44) 277-2791  
kiew-ob@bmeia.gv.at  
[www.bmeia.gv.at/kiew](http://www.bmeia.gv.at/kiew)


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[www.ukraine.mfa.gov.by](http://www.ukraine.mfa.gov.by)


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croemb.ukraine@mvep.hr  
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secretaria@embcuba.com.ua  
[www.misiones.minrex.gob.cu/ru/ukraina/posolstvo-kuby-v-ukraine](http://www.misiones.minrex.gob.cu/ru/ukraina/posolstvo-kuby-v-ukraine)


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embassykiew@mfa.gov.cy  
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Republic of Estonia**

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[www.eoiukraine.gov.in](http://www.eoiukraine.gov.in)


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kefemb@mofa.gov.iq  
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# EMBASSIES AND CONSULATES IN UKRAINE

as of December 15<sup>th</sup>, 2018



## Embassy of the Republic of Kazakhstan

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## Embassy of the Republic of Korea

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koremb@mofa.go.kr  
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## Embassy of the Republic of Latvia

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www.mfa.gov.lv/en/ukraine



## Embassy of the Republic of Lebanon

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kyiv.leb@gmail.com  
www.lebanonembassy.org.ua



## Embassy of the Republic of Lithuania

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amb.ua@urm.lt  
www.ua.mfa.lt



## Embassy of the Republic of Macedonia

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Phone: +380 (44) 287-7882  
Fax: +380 (44) 278-7892  
dkpkiev@mfa.gov.mk  
www.mfa.gov.mk/kyiv/index.  
php/en/about-the-embassy



## Embassy of the Republic of Moldova

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Fax: +380 (44) 521-2272  
kiev@mfa.md  
www.ucraina.mfa.md



## Embassy of the Republic of Poland

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kijow.amb.sekretariat@msz.gov.pl  
www.kijow.msz.gov.pl/uk



## Embassy of the Republic of Serbia

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## Embassy of the Republic of South Africa

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saemb.kiev@gmail.com  
www.dirco.gov.za



## Embassy of the Republic of Tajikistan

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and Northern Ireland**

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Fax: +380 (44) 501-1008  
consul@bhconsulate.org.ua  
www.bhconsulate.org.ua


**Embassy of the  
State of Israel**

34 Lesi Ukrainky Blvd., Kyiv 01901  
Phone: +380 (44) 586-1500  
Fax: +380 (44) 586-1556  
info@kiev.mfa.gov.il  
www.embassies.gov.il/kiev


**Embassy of the  
United Mexican States**

7 Klovskiy Uzviz, floor 15, office 23,  
Kyiv 01021  
Phone: +380 (44) 280-2025  
Fax: +380 (44) 280-2133  
mexicokiev@sre.gob.mx  
www.embamex.sre.gob.mx/ucrania


**Honorary Consulate  
of Ireland**

32B Khreshchatyk St.,  
Kyiv 01034  
Phone: +380 (44) 279-3200  
volodymyr@irishconsulate.kiev.ua  
www.irishconsulate.kiev.ua


**Embassy of the  
State of Kuwait**

19 Obolonska Naberezhna,  
block 1, Kyiv 04210  
Phone: +380 (44) 391-5160  
Fax: +380 (44) 391-5163  
kuwait\_embassy@ukr.net


**Embassy of the  
United States of America**

4 Sikorskoho St., Kyiv 04112  
Phone: +380 (44) 521-5000  
ua.usembassy.gov/uk


**Honorary Consulate  
of the Republic of Chile**

3 Olhynska St.,  
Kyiv 01001  
Phone: +380 (44) 277-7235  
Fax: +380 (44) 277-7272


**Embassy of Switzerland**

12 Kozyatynska St., Kyiv 01015  
Phone: +380 (44) 281-6128  
Fax: +380 (44) 280-1448  
kyiv@eda.admin.ch  
www.eda.admin.ch/kiev


**Embassy of Turkmenistan**

6 Pushkinska St., Kyiv 01901  
Phone: +380 (44) 279-3449  
Fax: +380 (44) 279-3034  
embassy@ambturkm.org.ua  
www.ukraine.tmembassy.gov.tm


**Honorary Consulate  
of the Republic of Iceland**

8 Yakira St.,  
Kyiv 04119  
Phone: +380 (44) 568-5963  
Fax: +380 (44) 568-5967  
iceland\_consulate@yahoo.com

# EMBASSIES AND CONSULATES IN UKRAINE

as of December 15<sup>th</sup>, 2018



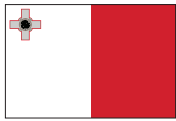
## Honorary Consulate of the Republic of Peru

25B Naberezhno-  
Khreshchatytska St., Kyiv 04070  
Phone: +380 (44) 425-2440  
Fax: +380 (44) 425-2420  
postmaster@consulado-peru.kiev.ua



## Attache for Economic and Commercial Affairs of the Republic of Peru in Ukraine

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Kyiv 04070  
Phone: +380 (44) 425-2440  
Fax.: +380 (44) 425-2420  
postmaster@consulado-peru.kiev.ua



## Honorary Consulate of Malta

13/1 Velyka Vasylkivska St., Kyiv 01004  
Phone: +380 (44) 234-0277  
Fax: +380 (44) 235-5152  
consulate@malta.in.ua  
www.malta.in.ua



## Honorary Consulate of the Republic of the Philippines

4B Muzeinyi Ln., Kyiv 01014  
Phone: +380 (44) 286-6210  
Fax.: +380 (44) 286-6210  
phconsulate@list.ru



## International Monetary Fund

5 Klovskiy Uzviz, floor 2,  
office 72, Kyiv 01021  
Phone: +380 (44) 220-1107  
Fax.: +380 (44) 220-1108  
RR-UKR@imf.org  
www.imf.org/en/Countries/  
ResRep/UKR



## Mission of Ukraine to the European Union

99-101 Avenue Louis Lepoutre  
Brussels B-1050, Belgium  
Phone: +322 340-98-60  
Fax.: +322 340-98-79  
pm\_eu@mfa.gov.ua  
www.ukraine-eu.mfa.gov.ua



## OECD (Organisation for Economic Co-operation and Development)

2 Andre-Pascal rue,  
Paris 75775, France  
Phone: +33 1 45 24-82-00  
Fax.: +33 1 45 24-85-00  
www.oecd.org



## Organization for Security and Co-operation in Europe (OSCE)

16 Striletska St., Kyiv 01030  
Phone: +380 (44) 492-0382  
Fax.: +380 (44) 492-0383  
office-pcu@osce.org  
www.osce.org/ukraine



## U.S. Agency for International Development (USAID)

4 Sikorskoho St., Kyiv 04112  
Phone: +380 (44) 521-5000  
Fax.: +380 (44) 521-5245  
kyvinfo@usaid.gov  
www.usaid.gov/uk/ukraine



## United Nations Development Programme

1 Klovskiy Uzviz, Kyiv 01021  
Phone: +380 (44) 253-9363  
Fax.: +380 (44) 253-2607  
registry.ua@undp.org  
www.ua.undp.org/  
content/ukraine



## United Nations Office in Ukraine

1 Klovskiy Uzviz, Kyiv 01021  
Phone: +380 (44) 253-9363  
Fax.: +380 (44) 253-2607  
un.ua@one.un.org  
www.un.org.ua



## World Bank Office in Ukraine

1 Dniprovsky Uzviz, floor 2, Kyiv 01010  
Phone: +380 (44) 490-6671  
ukraine@worldbank.org  
www.worldbank.org/uk/  
country/ukraine



## Business Ombudsman Council

40 Anri Barbyusa St., Kyiv 03150  
Phone: +380 (44) 537-2377  
Fax: +380 (44) 501-1008  
consul@bhconsulate.org.ua  
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## Chancery of the Apostolic Nunciature

40 Turhenievskaya St., Kyiv 01901  
Phone: +380 (44) 482-3557  
Fax.: +380 (44) 482-3553  
nuntiusua@gmail.com  
www.nunciaturekyiv.org

## Consulate of Ukraine in the US

240 East 49 St., New York 10017, USA  
Phone: +1 (212) 371-6965  
Fax.: +1 (212) 371-5547  
gc\_usn@mfa.gov.ua  
www.ny.mfa.gov.ua

## Council of Europe

8 Illinska St., ent. 7, floor 6, Kyiv 04070  
Phone: +380 (44) 425-0262  
Fax.: +380 (44) 425-6001  
kyiv@coe.int  
www.coe.int/uk/web/kyiv

## Delegation of the European Union to Ukraine

101 Volodymyrska St., Kyiv 01033  
Phone: +380 (44) 390-8010  
delegation-ukraine@eeas.europa.eu  
www.eeas.europa.eu/elegations/  
ukraine

# AMERICAN CHAMBERS OF COMMERCE WORLDWIDE

as of December 15<sup>th</sup>, 2018

## American Chamber of Commerce in Albania

Rr. Deshmoret e 4 shkurtit, Sky  
Tower, kati 11 Ap 3  
Tirana, Albania  
Phone: +355 (0) 225-9779  
info@amcham.com.al  
www.amcham.com.al

## American Chamber of Commerce in Armenia

1 Amiryan St., Armenia Marriott  
Hotel, floor 3, room 315, 317  
Yerevan 0010, RA, Armenia  
Phone: (+374) 55 599 187  
info@amcham.am  
www.amcham.am

## American Chamber of Commerce in Austria

39/7 Porzellangasse,  
Vienna 1090, Austria  
Phone: +43 1 319-5751  
Fax: +43 1 319-5751  
office@amcham.at  
www.amcham.at

## American Chamber of Commerce in Azerbaijan

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Baku AZ1010, Azerbaijan  
Phone: +99412 4971333  
Fax: +99412 4971097  
chamber@amchamaz.org  
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## American Chamber of Commerce in Belgium

rue du Trône 60/6 Troonstraat  
1050 Brussels, Belgium  
Phone: +32 (0)2 513-6770  
Fax: +32 (0)2 513-3590  
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## American Chamber of Commerce in Bosnia & Herzegovina

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Sarajevo 71000,  
Bosnia & Herzegovina  
Phone: +387 33 295 501/2  
Fax: +387 33 295 503  
amcham@amcham.ba  
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## American Chamber of Commerce in Bulgaria

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bld. 2, fl. 6,  
1766 Sofia, Bulgaria  
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Fax: +359 2 9742 741  
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www.amcham.bg

## American Chamber of Commerce in Croatia

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Zagreb, Croatia  
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Fax: +385 1 4836 776  
info@amcham.hr  
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## American Chamber of Commerce in Cyprus

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Fax: +357 22 668630  
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www.amchamcyprus.com.cy

## American Chamber of Commerce in the Czech Republic

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Fax: +420 222-329-433  
amcham@amcham.cz  
www.amcham.cz

## American Chamber of Commerce in Denmark

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2100 Copenhagen, Denmark  
Phone: +45 33 932 932  
mail@amcham.dk  
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## American Chamber of Commerce in Estonia

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Fax: +372 631 0521  
amcham@amcham.ee  
amcham.ee

## American Chamber of Commerce to the European Union (AmCham EU)

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Fax: +32 (2) 513-7928  
info@amchameu.eu  
www.amchameu.eu

## American Chamber of Commerce in Finland

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## American Chamber of Commerce in France

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Fax: +33 (015) 643-4560  
amchamfrance@amchamfrance.org  
www.amchamfrance.org

## American Chamber of Commerce in Georgia

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0105 Tbilisi, Georgia  
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www.amcham.ge

## American Chamber of Commerce in Germany

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Fax: +49 69 929104-11  
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## Gibraltar American Chamber of Commerce

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Phone: +350 54013244  
info@amcham.gi  
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# AMERICAN CHAMBERS OF COMMERCE WORLDWIDE

as of December 15<sup>th</sup>, 2018

## American-Hellenic Chamber of Commerce

109-111 Messoghion Ave.  
GR-115 26 Athens, Greece  
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Fax: +30 210 698 5686  
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## American Chamber of Commerce in Hungary

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Fax: +36 1 266 9888  
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www.amcham.hu

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PHD House, 4<sup>th</sup> Floor, 4/2 Siri  
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New Delhi -110016, India  
Phone: +91-11-26525201  
Fax: +91-11-26525203  
amcham@amchamindia.com  
www.amchamindia.com

## American Chamber of Commerce in Ireland

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D02 YD51, Dublin 2, Ireland  
Phone: +353 1 661 6201  
Fax: +353 1 661 6217  
info@amcham.ie  
www.amcham.ie

## The Israel-America Chamber of Commerce

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Tel Aviv 61333, Israel  
Phone: +972-3-6952341  
Fax: +972-3-6951272  
amcham@amcham.co.il  
www.amcham.co.il

## American Chamber of Commerce in Italy

Via Cesare Cantù, 1  
20123 Milan, Italy  
Phone: +39 (02) 86 90 661  
Fax: +39 (02) 39 29 67 52  
amcham@amcham.it  
www.amcham.it

## American Chamber of Commerce in Kazakhstan

506/99 Seifullin St./  
Kabanbai Batyr Ave.,  
Almaty 050012,  
Kazakhstan  
Phone: +7 (727) 330 92 50  
Fax: +7 (727) 330 92 51  
info@amcham.kz  
www.amcham.kz

## American Chamber of Commerce in Kosovo

Perandori Justinian str. no. 16  
10000 Pristina,  
Republic of Kosovo  
Phone: +381 38 609 013  
Fax: +381 38 609 012  
info@amchamksv.org  
www.amchamksv.org

## American Chamber of Commerce in Kyrgyz Republic

191 Abdrakhmanov St.,  
office 123, Bishkek,  
Kyrgyz Republic, 720011  
Phone: +996 (312) 62-3389  
memberservices@amcham.kg  
www.amcham.kg

## American Chamber of Commerce in Latvia

74/76-55 Dzirnava iela  
Riga, LV-1050, Latvia  
Phone: +371 6721-2204  
amcham@amcham.lv  
www.amcham.lv

## American Chamber of Commerce in Lithuania

26 Konstitucijos  
Vilnius, Lithuania  
Phone: +370 5 261 11 81  
info@amcham.lt  
www.amcham.lt

## American Chamber of Commerce in Luxembourg

6 rue Antoine de Saint-Exupéry  
L-1432,  
Luxembourg  
Phone: +352 43 17 56  
Fax: +352 26 09 47 04  
info@amcham.lu  
www.amcham.lu

## American Chamber of Commerce in Macedonia

Vasil Gjorgov 20A, floor 2,  
Skopje 1000,  
Republic of Macedonia  
Phone: +389 2 3216 714  
Fax: +389 2 3246 950  
info@amcham.com.mk  
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## American Chamber of Commerce in Malta

Exchange Buildings Republic St.  
Valletta VLT 05, Malta  
Phone: + (356) 2124 7233  
Fax: + (356) 2124 5223  
secretary@amcham-malta.org  
www.amcham-malta.org

## American Chamber of Commerce in Moldova

45 B, Puskin St., 3<sup>rd</sup> floor,  
MD-2005, Chisinau,  
Republic of Moldova  
Phone: + (373 22) 211 781  
Fax: + (373 22) 211 782  
info@amcham.md  
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## American Chamber of Commerce in Montenegro

Rimski trg 4/V  
81000 Podgorica,  
Montenegro  
Phone: +382 20 621 328  
info@amcham.me  
www.amcham.me

## American Chamber of Commerce in the Netherlands

P.O. Box 15783  
1001 NG Amsterdam,  
Netherlands  
Phone: +31 (0)20 7951840  
Fax: +31 (0)20 7951850  
office@amcham.nl  
www.amcham.nl

## American Chamber of Commerce in Norway

Arbins Gate 2,  
0253 OSLO, Norway  
Phone: +47 22 41 50 10  
amcham@amcham.no  
www.amcham.no

**American Chamber  
of Commerce in Peru**

177 Av. Victor Andrés Belaunde  
San Isidro, Lima 27, Peru  
Phone: +(51 1) 705-8000  
Fax: +(51 1) 705-8026  
amcham@amcham.org.pe  
www.amcham.org.pe

**American Chamber  
of Commerce in Poland**

18 Twarda St., Spektrum Tower,  
16<sup>th</sup> Floor  
00-105 Warsaw, Poland  
Phone: +48 (22) 520-5999  
Fax: +48 (22) 520-5998  
office@amcham.pl  
amcham.pl

**American Chamber  
of Commerce in Portugal**

155, 5 Esq, Rua D. Estefania  
Lisbon P-1000-154, Portugal  
Phone: +351 (21) 357-2561  
Fax: +351 (21) 357-2580  
chamber@portugal-us.com  
www.portugal-us.com

**American Chamber  
of Commerce in Romania**

11 Ion Campineanu St., floor 4  
Bucharest 010031, Romania  
Phone: + 40 21 312 48 34  
Fax: + 40 21 312 48 51  
amcham@amcham.ro  
www.amcham.ro

**American Chamber  
of Commerce in Serbia**

24/I Smiljanićeva  
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Phone: +381 11 3088 132  
Fax: +381 11 3088 922  
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**American Chamber  
of Commerce in Slovakia**

Hotel Crowne Plaza, 1<sup>st</sup> floor,  
Hodžovo námestie 2,  
811 06 Bratislava,  
Slovak Republic  
Phone: +421-2 5464 0534  
Fax: +421-2 5464 0535  
office@amcham.sk  
www.amcham.sk

**American Chamber  
of Commerce  
in Slovenia**

156 Dunajska St.  
1000 Ljubljana, Slovenia  
Phone: +386 8 205 13 50  
office@amcham.si  
www.amcham.si

**American Chamber  
of Commerce  
in Spain (Madrid)**

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Barcelona 08021, Spain  
Phone: +34 902 19 92 82  
amcham@amchamspain.com  
www.amchamspain.com

**American Chamber  
of Commerce in Sweden**

Box 190 SE-101 23 Stockholm,  
Sweden  
Phone: +46 8 506 126 10  
info@amcham.se  
www.amcham.se

**Swiss-American  
Chamber of Commerce**

41 Talacker,  
Zurich CH - 8001,  
Switzerland  
Phone: +41 43 443 72 00  
Fax: +41 43 497 22 70  
info@amcham.ch  
www.amcham.ch

**American Business Forum  
in Turkey (ABFT)**

Buyukdere Cad. No. 201 Levent  
Loft A55  
Levent -Istanbul, Turkey  
Phone: +90 212 243 35 11  
Fax: +90 212 243 35 17  
info@amchamturkey.org  
www.amchamturkey.com

**Turkish American Business  
Association (TABA)**

Sütlüce Mah. İmrahor  
Cad No:36 Kat 3,  
34445 Beyoğlu,  
Istanbul, Turkey  
Phone: +90 (212) 284 10 10  
Fax: +0 (212) 284 19 20  
amcham@amcham.org  
www.amcham.org

**British American Business**

12 Phillimore Walk, West Wing  
2<sup>nd</sup> Floor  
London W8 7RX, United Kingdom  
Phone: +44 (0)20 7290 9888  
ukinfo@babinc.org  
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**U.S. Chamber of Commerce**

615 H Street, NW  
Washington,  
DC 20062-2000, USA  
Phone: +1 (202) 659-6000  
emalinowski@uschamber.com  
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# SELECTED UKRAINIAN GOVERNMENT CONTACTS

as of December 15<sup>th</sup>, 2018

## Antimonopoly Committee of Ukraine

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Kyiv 03035  
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slg@amcu.gov.ua  
www.amc.gov.ua

## Cabinet of Ministers of Ukraine

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pr@kmu.gov.ua  
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## High Council of Justice

12A Studentska St.,  
Kyiv 04050  
Phone: +380 (44) 481-0626  
Fax: +380 (44) 489-6460  
zapyt@hcj.gov.ua  
www.vru.gov.ua

## Ministry of Agricultural Policy and Food of Ukraine

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Kyiv 01001  
Phone: +380 (44) 279-8474  
Fax: +380 (44) 278-7602  
hotline@minagro.gov.ua  
www.minagro.gov.ua

## Ministry of Culture of Ukraine

19 Ivana Franka St.,  
Kyiv 01601  
Phone: +380 (44) 235-2378  
Fax: +380 (44) 226-2645  
info@mincult.gov.ua  
mincult.kmu.gov.ua

## Ministry of Defense of Ukraine

6 Povitroflotskiy Ave.,  
Kyiv 03168  
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admou@mil.gov.ua  
www.mil.gov.ua

## Ministry of Ecology and Natural Resources of Ukraine

35 Vasylia Lypkivskogo St.,  
Kyiv 03035  
Phone: +380 (44) 206-3100  
Fax: +380 (44) 206-3107  
gr\_priem@menr.gov.ua  
www.menr.gov.ua

## Ministry of Economic Development and Trade of Ukraine

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Fax: +380 (44) 253-6371  
meconomy@me.gov.ua  
www.me.gov.ua

## Ministry of Education and Science of Ukraine

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Kyiv 01135  
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Fax: +380 (44) 481-4796  
mon@mon.gov.ua  
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## Ministry of Energy and Coal Industry of Ukraine

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Kyiv 01601  
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## Ministry of Finance of Ukraine

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## Ministry of Foreign Affairs of Ukraine

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zsmfa@mfa.gov.ua  
www.mfa.gov.ua

## Ministry of Health of Ukraine

7 Hrushevskoho St.,  
Kyiv 01601  
Phone: +380 (44) 253-6194  
moz@moz.gov.ua  
www.moz.gov.ua

## Ministry of Information Policy

2 Prorizna St.,  
Kyiv 02000  
Phone: +380 (44) 200-4123  
press@mip.gov.ua  
www.mip.gov.ua

## Ministry of Infrastructure of Ukraine

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Fax: +380 (44) 351-4845  
miy@mtu.gov.ua  
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## Ministry of Internal Affairs of Ukraine

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main@centrmia.gov.ua  
www.mvs.gov.ua

## Ministry of Justice of Ukraine

13 Horodetskogo St.,  
Kyiv 01001  
Phone: +380 (44) 278-3723  
Fax: +380 (44) 271-1783  
themis@minjust.gov.ua  
www.minjust.gov.ua

## Ministry of Regional Development, Construction and Municipal Economy of Ukraine

9 Velyka Zhytomyrska St.,  
Kyiv 01601  
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Fax: +380 (44) 278-8290  
minregion@minregion.gov.ua  
www.minregion.gov.ua

## Ministry of Social Policy of Ukraine

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## Ministry of Youth and Sport of Ukraine

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correspond@dsmu.gov.ua  
www.dsmu.gov.ua



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**National Bank of Ukraine**

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**National Commission for State  
Regulation of Energy  
and Public Utilities**

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**National Commission for  
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and Informatization**

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**National Securities and Stock  
Market Commission**

8 Moskovska St.,  
Kyiv 01010  
Phone: +380 (44) 254-2331  
info@nssmc.gov.ua  
nssmc.gov.ua

**National Security and Defense  
Council of Ukraine**

8 Komandarma Kamenieva St.,  
Kyiv 01601  
Phone: +380 (44) 255-0515  
Fax: +380 (44) 255-0585  
www.rnbo.gov.ua

**Presidential Administration of  
Ukraine**

11 Bankova St., Kyiv 01220  
Phone: +380 (44) 255-7333  
www.president.gov.ua

**State Aviation Administration  
of Ukraine**

14 Peremohy Ave.,  
Kyiv 01135  
Phone: +380 (44) 351-5692  
Fax: +380 (44) 351-5692  
vdz@avia.gov.ua  
www.avia.gov.ua

**State Border Guard Service  
of Ukraine**

26 Volodymyrska St.,  
Kyiv 01601  
Phone: +380 (44) 527-6363  
zvernennia@dpsu.gov.ua  
www.dpsu.gov.ua

**State Financial Monitoring  
Service of Ukraine**

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Kyiv 04655  
Phone: +380 (44) 594-1652  
Fax: +380 (44) 594-1652  
sdfm@sdfm.gov.ua  
www.sdfm.gov.ua

**State Fiscal Service of Ukraine**

8 Lvivska Sq.,  
Kyiv 04053  
Phone: +380 (44) 272-5159  
post@sfs.gov.ua  
www.sfs.gov.ua

**State Labor Service of Ukraine**

14 Desyatynna St.,  
Kyiv 01601  
Phone: +380 (44) 289-8676  
dsp@dsp.gov.ua  
dsp.gov.ua

**State Migration Service  
of Ukraine**

9 Volodymyrska St.,  
Kyiv 01001  
Phone: +380 (44) 278-5030  
Fax: +380 (44) 226-2339  
info@dmsu.gov.ua  
www.dmsu.gov.ua

**State Property Fund of Ukraine**

18/9 Generala Almazove St.,  
Kyiv 01133  
Phone: +380 (44) 254-2976  
Fax: +380 (44) 286-7985  
press@spfu.gov.ua  
www.spfu.gov.ua

**State Regulatory  
Service of Ukraine**

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Kyiv 01011  
Phone: +380 (44) 254-5673  
Fax: +380 (44) 254-4393  
inform@dkrp.gov.ua  
www.drs.gov.ua

**State Service  
for Food Safety  
and Consumer Protection**

1 Grinchenko St.,  
Kyiv 01001  
Phone: +380 (44) 279-1270  
Fax: +380 (44) 279-4883  
head@consumer.gov.ua  
www.consumer.gov.ua

**State Service  
of Special Communication  
and Information Protection  
of Ukraine**

13 Solomianska St.,  
Kyiv 03680  
Phone: +380 (44) 281-9281  
info@dsszzi.gov.ua  
www.dsszzi.gov.ua

**State Service of Medicinal  
Products and Drugs Control  
of Ukraine**

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Kyiv 03115  
Phone: +380 (44) 422-5577  
dls@dls.gov.ua  
www.diklz.gov.ua

**State Service of Ukraine  
on Questions of Geodesy,  
Cartography and Cadastre**

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Kyiv 03680  
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land@land.gov.ua  
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**Verkhovna Rada  
of Ukraine  
(Parliament)**

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as of December 15<sup>th</sup>, 2018

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## **VRU Committee on Freedom of Speech and Information**

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## **VRU Committee on Healthcare**

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## **VRU Committee on Industrial Policy and Entrepreneurship**

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## **VRU Committee on Judicial Policy and Justice**

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## **VRU Committee on Preventing and Combating Corruption**

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## **VRU Committee on Science and Education**

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## **VRU Committee on Social Policy, Employment and Pensions**

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