



AMCHAM UKRAINE

UKRAINE BUSINESS CLIMATE END-OF-YEAR SURVEY

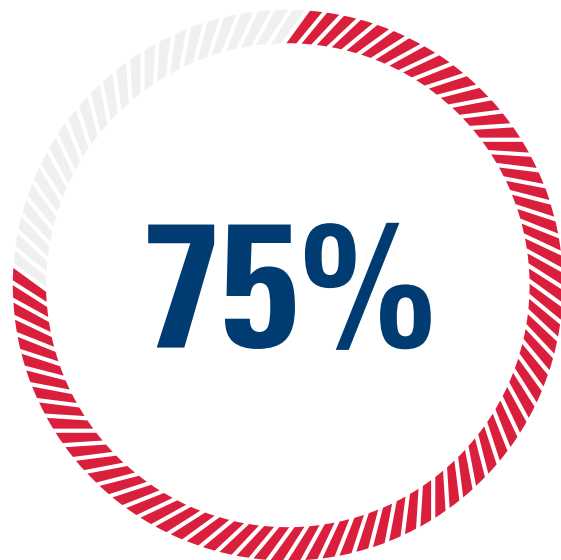
NOVEMBER 28 – DECEMBER 7, 2022



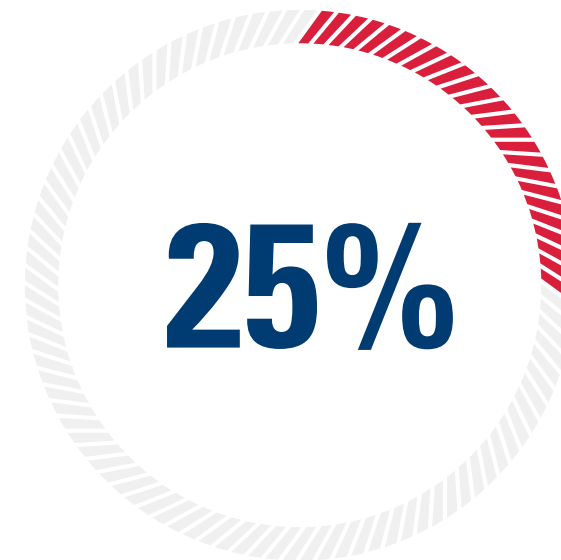


Respondents

122 AmCham member companies' representatives: biggest Ukrainian and international investors



CEOs



top-managers



Does your organization continue to operate in Ukraine after almost 10 months of war?



yes

fully operational – **70%**

partially operational – **30%**

Other – 1%:

- ☑ split operations between Ukraine and another country



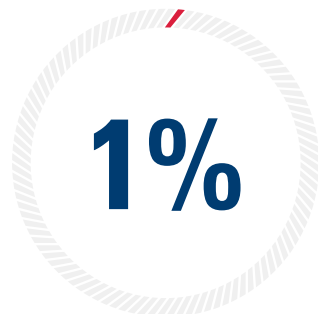
Does your organization continue to pay salaries after almost 10 months of war?



full salary



reduced salary



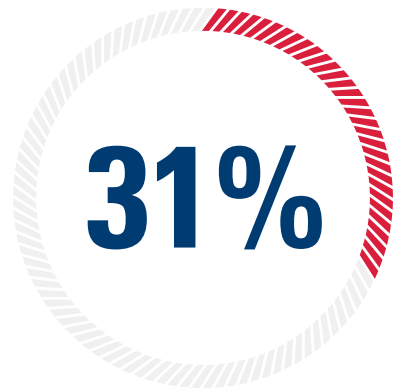
no salary

Other – 2%:

- ✓ full salary in most cases (switched to hourly rates instead of fixed monthly salaries)
- ✓ full salary depending on the employees' workload



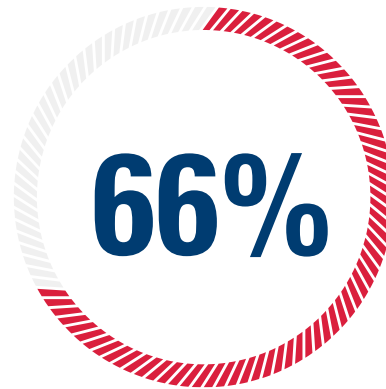
Have your organization's plants/factories/facilities/storehouses/offices been damaged during almost 10 months of war?



yes

minor damage – **71%**

unrepairable damage – **29%**



no

Other – 3%:

- ✓ assets under occupation
- ✓ closed office in one region
- ✓ no facilities/plants/storehouses/offices in Ukraine



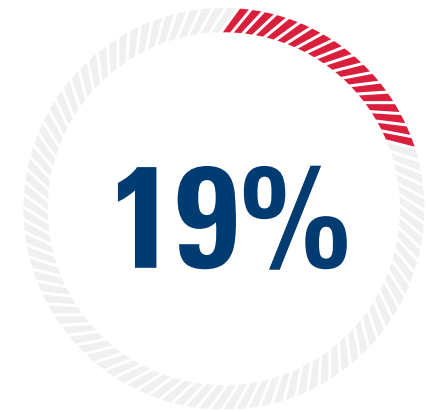
Have any of your organization's employees been injured or killed during almost 10 months of war?



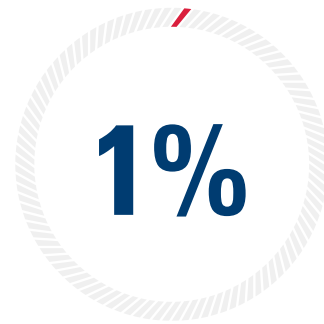
all safe



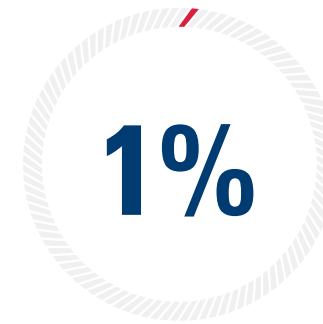
employees injured



employees killed



employees missing



employees in captivity



Does your organization continue to provide humanitarian support after almost 10 months of war?



yes



no

Other – 2%:

- ✓ provision of cars for the Armed Forces of Ukraine
- ✓ provision of pro-bono services
- ✓ volunteering activities of employees



What are the biggest challenges for your organization after almost 10 months of war?

87%

instability with electricity, water, mobile network, or heat supply

74%

safety and security of employees

43%

logistics and transport

32%

decline in partners' businesses

22%

absence of clients/orders

export-import operations – 19% supply shortages – 12% relocation – 11%

Other:

- ✓ reservation of staff
- ✓ bureaucracy & red tape
- ✓ assets under occupation
- ✓ inability to make payments to foreign reinsurers



Does your organization plan to continue operating in Ukraine in 2023?



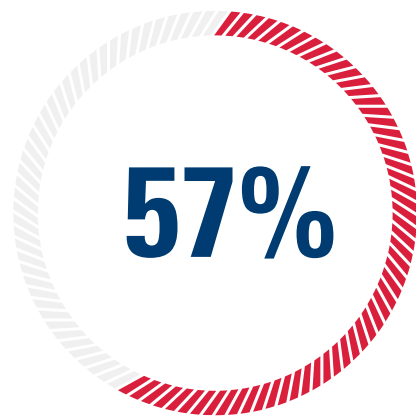
yes



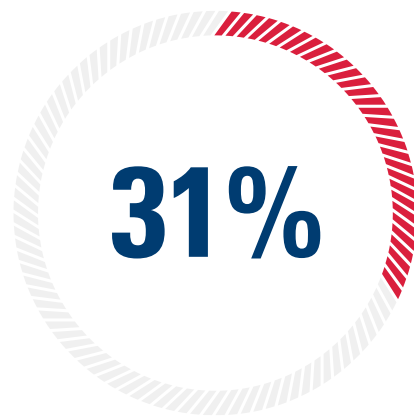
I don't know yet



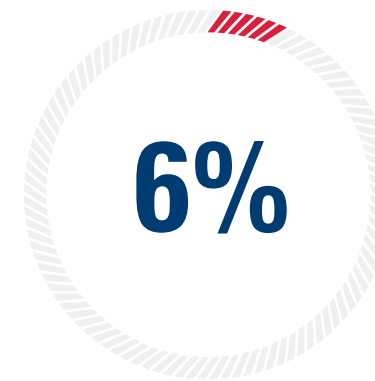
When do you think Ukraine's post-war rebuilding and reconstruction will begin?



2023



2024



2025

difficult to answer – **4%**
after Ukraine's victory – **2%**



Do you think Russia should pay war reparations to Ukraine?



yes



no

Other – 3%:

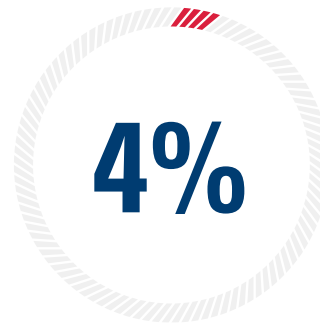
- ✓ war reparations define a result of a legal process that has not begun yet
- ✓ unlikely Russia will pay
- ✓ I don't know



Will a possible winter energy blackout prevent Ukraine from winning the war?



no



yes

Other – 2%:

- ✓ different stages of blackout may have different effect
- ✓ I don't know