UKRAINE LABOR MARKET AND SKILLS NEEDS ASSESSMENT

state, trends and prospects

2023-2024

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JOINT EMERGENCY RESPONSE UKRAINE

ДЕРЖАВНА СЛУЖБА ЗАЙНЯТОСТІ

ФЕДЕРАЦІЯ РОБОТОДАВЦІВ УКРАЇНИ

LABOR MARKET OF UKRAINE 2023-2024: state, trends and prospects

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This report was prepared on a joint initiative of the State Employment Service of Ukraine, the Federation of Employers of Ukraine, Helvetas Swiss Intercooperation, and is based on an open data analysis and a survey of enterprises conducted by employment centers in all controlled areas of Ukraine.

The report is developed within the project "Supporting the reconstruction of communities' social and financial resilience in war affected communities in East and West Ukraine", funded by the German Federal Ministry for Economic Cooperation and Development (BMZ) and implemented by Helvetas Swiss Intercooperation in partnership with JERU (Joint Emergency Response in Ukraine of Welthungerhilfe and Concern Worldwide).

The publication is devoted to the main aspects of labour market performance under the conditions of war, and the specifics of the existing and prospective needs of employers in occupations and skills. In particular, the report assesses and analyses the level of economy digitalisation and the needs of enterprises in digital skills. Estimates of the available volumes and needs of employees, as well as the features of cooperation between employers and educational institutions and the employment service, are provided.

An integral part of this report is the developed online presentation of the received data by regions, districts, types of economic activity and occupations, which is available on the web portal of the State Employment Service.

Content

List of abbreviations

PFU - Pension Fund of Ukraine

VTE - Vocational and technical education

IVTE - Institutions of vocational and technical education

SES - State Employment Service

FEU - Federation of Employers of Ukraine

USR - Unified State Register

IE – Individual entrepreneur

EIO - Enterprises, institutions, organizations

AFU - Armed Forces of Ukraine

IDPs – Internally displaced persons

ILO - International Labor Organization

MSME - Micro, small and medium enterprises

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Preface

The full-scale war in Ukraine has caused widespread devastation, forcing people to flee and leading to loss of livelihoods and shelter. Businesses, especially those in the hardest-hit areas, have either moved, partially closed, or completely shut down operations. As of January 2023, around 26.5% of businesses had ceased operations entirely, while 50% had reduced activities. Those still operating face disruptions due to broken supply chains, logistics issues, disrupted trade links, and weakened markets. The labour market has also been heavily affected by an increase in the unemployment rate and massive internal and external migration. By various estimates, in January 2023 over 3 million people were unemployed, up to 5 million were internally displaced persons, and over 5 million left Ukraine.

In response, under the auspices of JERU (the Joint Emergency Response in Ukraine of Welthungerhilfe and Concern Worldwide), in partnership with another Alliance 2015 member - Helvetas Swiss Intercooperation, the project "Supporting the reconstruction of communities' social and financial resilience in war-affected communities in East and West of Ukraine" was initiated. JERU will implement this project in collaboration with two well experienced national charitable foundations: Peaceful Heaven of Kharkiv and Light of Hope. They are both existing partners of JERU in Ukraine and have a track record of implementing livelihoods programs prior to the start of the war. As the project progresses, JERU will assess the capacity of other national partners to support implementation and increase the number of actors dedicated to supporting transitional assistance and the economic recovery of Ukraine. Support self-employment opportunities for IDPs and war-affected persons to launch or restore micro businesses and reduce their reliance on external aid.

An important part of the project was a labour market study for reflect the current economic and business needs and provide relevant information for future policy planning and decision-making regarding skills training and human capital development in Ukraine. The labour market study was conducted in November-December 2023 by Helvetas Swiss Intercooperation, in a cooperation with a State employment service of Ukraine, which provided the data collection phase from employers all over Ukraine, including companies relocated from the temporarily occupied territories of Donetsk and Luhansk regions.

Another important aspect of the study was the analysis of available statistics from the Pension Fund of Ukraine and the State Employment Service on the number and occupational structure of employed and unemployed persons by region and type of economic activity.

This report focuses on the main aspects of the labour market performance in the context of the war, and the specifics of current and future needs of employers for occupations and skills. In particular, the report assesses and analyses the level of economy digitalisation and the needs of enterprises for digital skills. It also provides estimates of the existing volumes and needs for employee training, as well as the specifics of cooperation between employers and educational institutions and the employment service.

Summary

General trends in the labour market

Overall, 2023 was a much better year for the Ukrainian economy than the previous one. After the collapse of the 2022 crisis, the country's economy stabilised and recovery began in some segments. Conditional stability was maintained in the main sectors of the economy, including agriculture, industry, and trade.

According to the survey, the largest segment of enterprises (42%) reported that the volume of production, services, or work remained at the level of the previous year, which is rather a negative signal given the overall state of the economy in 2022. At the same time, the segment of companies reporting a moderate or gradual decline in production outnumbered those reporting growth (36% vs. 22%). The situation is relatively better at large enterprises and in most western regions of Ukraine. The most difficult situation is observed for small and micro enterprises in the areas liberated from occupation in 2022 and in the regions adjacent to the frontline. Businesses' expectations of changes in production volumes are more optimistic. Despite the fact that the vast majority of enterprises (55%) do not expect changes, 28% of enterprises await a possible increase in production volumes, while only 16% expect a possible decrease.

Demographic problems remained the most significant factor of pressure on the labour market. Against the backdrop of low birth rates and high mortality rates (including as a result of russia's terrorist attacks on civilians), there has been a cessation of the massive outflow of people abroad and a partial return of people to Ukraine. At the same time, there is a constant outflow of children of senior school age (especially males) abroad to study.

Mobilisation has been and will continue to be the most significant factor affecting the labour market. Conscription into the Armed Forces of Ukraine significantly affected the volume of hiring, led to changes in staff turnover, caused specific supply and demand patterns, and exacerbated the existing shortage of personnel in the labour market. In 2023, there was an increased demand for employees, and the total number of job vacancies reached the level of 2021. Businesses responded to the significant shortage of workers by increasing job vacancies for vulnerable categories, including young people without work experience, veterans, people with disabilities, and people of retirement age.

A characteristic trend in the labour market in 2023 was the growth in female employment. The shortage of workers in traditionally male occupations led to the recruitment of women. There are successful cases of many enterprises retraining female staff to fill vacant positions in the professions of welders, forklift drivers, drivers, etc.

The economy continues to undergo digitalisation. The range of digital technologies in production processes is constantly expanding. According to the survey, more than 90% of companies are implementing modern technologies in production. There is widespread use of Internet technologies, electronic reporting, etc. There is a notable segment of enterprises that actively use advanced artificial intelligence and robotics technologies, covering up to 10% of enterprises. In general, there is a high degree of staff involvement in the use of digital technologies to perform work tasks. This situation determines the increased need for digital skills at various levels and constantly sets new requirements for staff qualifications.

Current and future staffing needs

In general, hiring outweighed dismissals, while 49% of companies reported neither hiring nor dismissing employees. Large and medium-sized enterprises were the most active hiring firms. The greatest demand for workers was observed in the Energy, Healthcare, and Mining sectors.

In 2023, companies mostly hired representatives of blue-collar occupations. In particular, in the overall structure of hired workers in 2023, the largest groups were machinery and equipment maintenance workers (22%) and trade and service workers (22%). The most commonly hired occupations in 2023 were: Salespersons, Motor vehicle drivers, Auxiliary workers, Accountants, Nurses, Tractor drivers, Security guards, Cooks, Cleaners and Seamstresses.

It should be noted that most of these professions are occupations that are provided by vocational education institutions. To a large extent, the volume of hiring was driven not so much by additional demand for workers as by the search for replacements for retired employees (mainly due to mass migration abroad and mobilisation).

Employers of all categories and sectors of the economy noted that an employee's responsible attitude to work is the most important factor in hiring employees. In general, employers believe that the lack of certain knowledge and skills can be compensated for by a responsible attitude to work and a willingness to learn from more experienced employees.

Perhaps wartime and war conditions have led to high estimates of the demand for stress resistance. In addition to the above, employers noted customer service skills, tact, and communication skills. Teamwork, attentiveness, result-orientation, ability to work with appropriate equipment, learning ability, and command of the state language are also in demand.

In the future, skills in working with modern equipment, using the latest technologies and digital skills will become increasingly important. The skills of working with data and integrating artificial intelligence systems into work processes are particularly important. The prospects for European integration are driving the growing demand for knowledge of European norms and standards.

Employers are rather cautious about the prospects of expanding their staff and additional hiring in 2024. The vast majority of companies do not plan staff increases. In Ukraine, as a whole, only 8% of enterprises indicated the possibility of additional recruitment in 2024, and only 2% of them noted that they were confident in the implementation of these plans. The largest share of planned additional hiring is in the Processing (34%) and Trade (24%) sectors. At the same time, according to the estimates provided, these sectors do not offer the most attractive salaries. On average, the highest salaries for additional recruitment in 2024 will be offered in the sectors of Finance, Mining, Healthcare, and Energy.

More than 40% of companies indicate plans to increase salaries in 2024. The largest share of firms planning to increase wages is recorded in the Processing, Finance, and Energy sectors. In the meantime, the overall expected increase in wages is insignificant. Thus, the total amount of the announced wage increase in 2023 is 13% on average, which is clearly insignificant.

Employment of vulnerable groups

The problems with employment of vulnerable groups have been exacerbated by the complicated process of creating new jobs in the context of the war. In particular, in 2023, people with disabilities accounted for 3.9% of all employees hired, IDPs for 5.2%, and veterans for only 0.8%. It is safe to say that dismissals from the army are not widespread, and discharged servicemen and women with varying degrees of injury have not yet entered the labour market. Employers understand the prospects of increasing the number of representatives of this vulnerable group after the end of active hostilities. A significant number of employers indicate their readiness to hire employees from vulnerable groups. In particular, more than 40% of employers positively assessed the possibility of hiring IDPs and persons with disabilities, and 36% indicated their readiness to hire war veterans.

Employment of representatives of vulnerable groups is complicated by risks and obstacles that significantly affect the effectiveness of this process. In general, employers' assessment of barriers to employment of vulnerable groups indicates insufficient awareness of the severity of the problems that will accompany the employment and organisation of work of these groups in the future. More than 60% of employers state that there are no obstacles to hiring such persons, and the biggest obstacle to their employment is that representatives of these groups are not looking for work. Meanwhile, the majority of employers (over 70%) note that they do not need any support to hire representatives of vulnerable groups.

Personnel training needs

According to a survey of employers, in 2023, on average, 35.2% of companies in Ukraine provided staff training. Compared to the previous year, 2022, this share slightly decreased due to a decrease in employee training among small businesses. These data generally support the conclusion that a significant number of companies are in a difficult situation and have reduced their expenditures on employee training. A significant share of firms did not conduct any training at all, and those that did continue to train their staff significantly optimised this process.

In most cases, businesses solve the problem of employee training on their own by setting up training centres, mentoring systems, etc. Non-core needs are met by outsourcing the services of suppliers and/or external providers. The emergence of qualification centres has greatly simplified the ability to hire workers in related professions or simply experienced workers capable of performing certain skilled jobs. The participation of higher education and vocational education institutions in the structure of employee training for the private sector is insignificant but present, and, at the same time, very important for the public and individual sectors. In particular, higher education institutions play an important role in the education and healthcare sectors, while institutions of vocal and technical education are essential to the public utilities sector.

Despite the existing demand for training, the financial and economic situation of enterprises significantly limits the ability to train employees. A significant number of enterprises, especially in the small and microenterprise segments, are unable to finance training. The vast majority of employers (86%) indicate that the volume of employee training will remain unchanged over the next year. At the same time, 11.5% of enterprises indicate that they plan to increase the volume of employee training and only 3% of enterprises plan to decrease the volume of employee training

Cooperation with institutions of vocal and technical education

Most enterprises do not cooperate with institutions of vocal and technical education. Cooperation with educational institutions is carried out mainly by large and medium enterprises in sectors with a significant share of blue-collar occupations. In general, this situation is traditional for Ukraine. Numerous studies show that in recent years there has been a tendency to improve the situation and expand the number of enterprises cooperating with institutions of vocal and technical education. According to the survey results, 25% of enterprises report cooperation with educational institutions. The most common form of cooperation is the organisation of internships.

As a rule, employers cite the lack of such a need and the absence of training programmes for the required occupations in educational institutions as reasons for the lack of cooperation.

Conclusions and recommendations

Ukraine's economy started to grow in 2023 and is expected to grow by 3% to 5% by the end of the year. Unfortunately, against the backdrop of a 30% drop in GDP in 2022, this result should not be overestimated. In 2024, the economic situation will remain challenging, with relative stability complicated by military risks and a possible reduction in foreign aid, which could threaten macroeconomic stability.
Continued military aggression by Russia and its terrorist attacks on civilian and infrastructure targets make businesses very cautious about their development prospects. Significant human resource needs of the Armed Forces of Ukraine create additional pressure on the labour market and increase the shortage of skilled workers, especially in key worker occupations. At the same time, the increased shortage of workers in 2023 did not result in a significant increase in wages, which further indicates a difficult situation in the economy. The Government's planned increase in the minimum wage is undoubtedly a necessary social policy step, but in a difficult economic environment it may result in the growth of the shadow segment in small businesses, which suffered the largest losses in both 2022 and 2023.

Nevertheless, there is a certain balance of negative and positive trends in the economy, which suggests a relatively stable situation in the economy and labour market in 2024. Thus, the segment of companies that are stable, expanding production and have an increased demand for employees will be able to at least partially meet it at the expense of the segment that is phasing down or suspending production.
The mobilisation and needs of the Armed Forces of Ukraine in 2024 will generally be the main factor of direct and indirect impact on the labour market. The direct impact of mobilisation on the labour market is the involvement of a significant number of people, including skilled professionals, in the AFU. The indirect impact of mobilisation on the labour shortage constitutes the reluctance of men to officially apply for a job and formalise their employment relations in order to avoid mobilisation and sometimes their actual withdrawal from the labour market. These trends generally contribute to a greater demand for women and young people (including those without work experience) in the labour market. The significant human resource needs of the AFU are indirectly evidenced by the absence of mass demobilisation. It can be stated that veterans and disabled veterans have not become a statistically significant group in the labour market in terms of numbers. However, it is clear that their share on the labour market will grow steadily in the near future.

The current and future needs of employers for workers and skills assessed in this study indicate that the greatest demand will remain for blue-collar occupations.

In the energy, processing, and mining sectors, there will be an increased demand for workers in metalworking occupations (welders, machine operators, turners, and milling machine operators), locksmithing occupations (repairmen, assemblers), and electrical occupations (electricians and linemen). Drivers, tailors, seamstresses, cooks and bakers will remain in demand.
In the trade sector, drivers, forwarders, and sales assistants will be in demand. In construction, demand for workers will continue for all construction occupations, with a particularly strong demand for welders, concrete workers, crane operators, and shovel operators. In agriculture, it will be for the main sectors occupations, in particular, for tractor drivers and machine operators. Increased demand for workers of all categories will remain in the healthcare sector. The existing shortage of junior medical staff will continue in the coming years. In addition to blue-collar occupations, employers will also need key employees. First and foremost, there is a need for

doctors and engineers of various specialisations. There will be a significant demand for IT specialists, including programmers, data scientists, machine learning and artificial intelligence specialists.

In general, it is noted that soft skills are becoming increasingly important for employers. For example, employers primarily require employees to have a responsible and attentive attitude to work, possess teamwork, customer service and communication skills, and stress resistance. Professional skills in working with the appropriate tools and equipment are as important as the ability to learn and assimilate new information. Such assessments confirm the willingness of employers to provide training in the necessary technical skills on their own.

Digital skills are becoming a universal necessity. Digital skills are generally in demand for workers in the vast majority of occupations in all sectors of the economy. At the same time, there is a fairly high level of digital literacy among employees and job seekers, and especially among young people. There is a relatively simple process for employees to master digital innovations or adapt new employees to the digital environment of companies. The process of digitalisation and the introduction of the latest technologies into production processes will increase the importance of digital skills for all professions and increase the demand for new occupations such as precision farming system operators, 3D printing engineers and operators, Big Data analysts, AI marketers, etc.

In the context of the identified trends, it is advisable to make a number of recommendations on the necessary steps to support employment and balance supply and demand in the labour market. In particular, in order to meet the needs of the economy for skilled workers, it is advisable to

- Promote the development and improvement of the quality of vocational education, which may include creating safe conditions for students to study and live in wartime; engaging the best Ukrainian employers in an information campaign on the opportunities and benefits of obtaining safe and profitable employment in Ukraine; stimulating employer participation in the education process, developing dual education; strengthening the practice-oriented content of educational programmes to acquire the most in-demand skills; involving providers of training in the educational process.
- Encourage the population (especially women and young people, people of pre-retirement and retirement age) to be retrained to acquire a new profession in demand, including through the creation of appropriate educational (re-skilling / up-skilling) programmes in the VTE and SES system and the offering of highly demanded and required trainings on soft skills.
- Closing the widened wage gap, which women are facing. The shortage of male labour had a positive effect on the gender gap, however also came with a negative effect on the wage gap. Raising awareness and advocating efforts to work towards equal pay are needed.
- Supporting access to and availability of (practical) trainings on demanded, but transferable skills (e.g. mining or energy sector), will increase chances of IDPs finding employment and employers to recruit qualified personnel to support meeting the demand for specialists.
- Experience shows, that working with MSMEs (e.g. in the Service, Hotel and Restaurant business, and Construction sectors) is often more effective than working with larger companies who dispose of more resources to train staff. Ensuring that small and medium enterprises are widely informed about available training and re-training opportunities in VTE and SES institutions, as well as confirmation of full or partial professional competences in qualification centres is relevant.
- Facilitate the involvement of veterans/veterans with disabilities in retraining and professional development programmes.

- Provide advisory support to employers on the specifics of organising workplaces for veterans with disabilities (ensuring barrier-free workplace);
- Promote information campaigns to disseminate positive experience of effective corporate social responsibility programmes in the area of employment of veterans/veterans with disabilities.

Undoubtedly, these steps will make sense if the general preconditions for economic growth are created through legislative changes to support business, with mitigation of tax and customs tariffs, and implementing effective credit and anti-corruption policies. With the war going into its second year, the crisis is increasingly becoming one of a protracted nature. In terms of providing recommendations, it is therefore relevant to link short-term humanitarian assistance and emergency projects to more long-term development projects. This indicates that working alongside a comprehensive approach will become increasingly important for the effectiveness of future interventions.

1 General trends of the labour market

1.1 Economic and demographic factors of changes

In general, the year 2023 will be much better for the Ukrainian economy than the previous one. Overall, the situation in the economy remains difficult due to the war and related losses. However, according to the results of the six months, the country's GDP began to grow. In the second quarter, GDP grew by 19.5% compared to the previous year, which strengthened the forecasts of the National Bank and the Ministry of Economy of Ukraine regarding the annual growth of GDP by 3%[1].

Gradual economic growth at the end of the year is determined by the situation in the main sectors of the economy. In agriculture, despite a slight reduction in the sown area, in comparison with the previous year, a larger harvest and correspondingly larger volumes of grain and oil crops are expected. Notwithstanding the partial recovery, the logistics of agricultural products export remains the most significant problem. This is the same for the metallurgy sector, where there is a gradual reduction in the volume of metal production. However, it remains at the level of 55% at the metallurgical plants from 2021, and at the level of 35% at the mining and beneficiation plants In August 2023, seaborne exports of metal resumed, which is a very promising factor.

The energy sector is recovering from the winter attacks. In September 2023, electricity exports resumed. According to the Ministry of Energy, 98% of planned repairs to power grids have been completed, 70% to nuclear power plants, and only 30% to thermal power plants. Ukraine continues to accumulate reserves of natural gas and coal, but has not yet reached the planned volumes. Thus, as of September, gas storages were short of the planned level by 0.7 billion m3.

[1]Review of the economy in August. Center for Economic Strategy. https://ces.org.ua

In the financial sector, the amount of financial support from partner countries constitutes the most significant factor of stability. According to statistical data, in September, consumer-price inflation continued to slow down and amounted to 7.1% compared to the previous year, which should lead to 8.6% over a year. The main factors of the slowdown in inflation are the generally restrained consumer demand, the decrease in world prices for agricultural products and the support of the hryvnia exchange rate by the NBU. The national currency strengthened, and international reserves rose to a record high value[2].

At the same time, the general index of expectations of business activity, after three months of growth, began to fluctuate near the neutral level in September and October[3]. Nevertheless, the expectations of trade and construction enterprises remain positive. In general, economic activity and business confidence remain at an extremely low level due to war risks, logistical and export issues, high fuel prices and (!) labour shortages.

The labour market is marked by a reduction in the level of registered unemployment. Compared to the previous year, the number of registered unemployed has more than halved. Thus, as of 1 December 2022, 208.9 thousand people were registered at employment centres, while in 2023, only 95.4 thousand people were registered. In contrast, as of 1 December 2021, the number of officially registered unemployed was 261 thousand people.

During 11 months of 2023, 463.9 thousand people were registered at employment centres, which is significantly less compared to 2022 and 2021. Thus, the number of unemployed people registered during 11 months of 2022 was 839 thousand, while in 2021 – 1.1 million. This situation is explained by a reduction in the period of stay on the register to 3 months. There has also been a significant increase in the share of unemployed women, which is explained by the factor of mobilisation and men's reluctance to register with employment centres. A characteristic feature of registered unemployment is that there are no differences between regions. The decline in registered unemployment and its gender imbalance are common to all regions.

[2]Review of the economy in August. Center for Economic Strategy. https://ces.org.ua
[3]National Bank of Ukraine // https://bank.gov.ua/ua/statistic/nbusurvey

It should be noted that the level of registered unemployment differed significantly from the unemployment rate calculated on the basis of sampling observations using the ILO methodology.

At the same time, according to independent analytical estimates, the unemployment rate in Ukraine is up to 15%[4]. During 2010-2019, this figure fluctuated between 7-9% and increased to 10-11% in 2020-2021. Given the difficulty of obtaining reliable estimates of the unemployment rate through public opinion polls, we note that this estimate is supported by numerous expert studies[5].

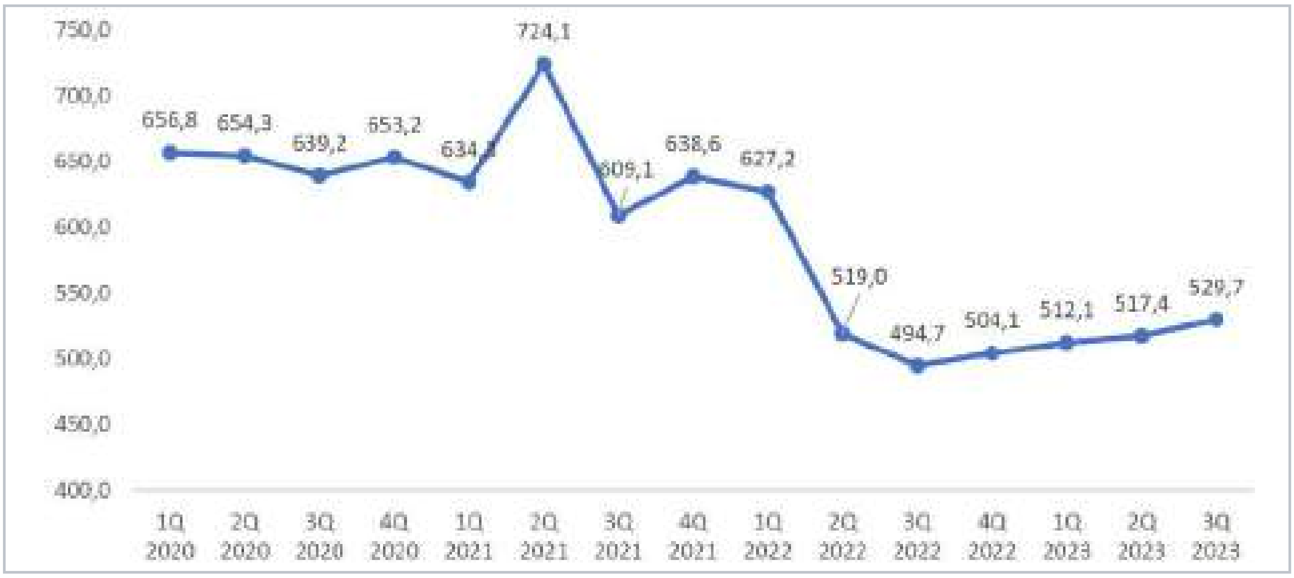
The general premise of a difficult situation on the labour market is the demographic gap that was a consequence of mass external migration[6], an increase in the mortality rate[7], and a decrease in the birth rate[8]. According to the International Organization for Migration, as of August 2023, 6.2 million people are outside the country, and 3.7 million are internally displaced persons. In the first half of 2023, 96,800 children were born in Ukraine, which is 28% less than in the corresponding period of 2021.

It is obvious that the gradual economic stabilisation and growing demographic pressure should be considered as factors of the growing shortage of personnel in the labour market, which in the future can significantly restrain economic recovery and become an obstacle to growth.

1.2 Structure of enterprises and entrepreneurship

After the crisis reduction during 2022[9], the number of enterprises in 2023 began to grow within 1% and at the end of the second quarter amounted to 530 thousand enterprises of all forms of ownership. Of these, only 3 % are state-funded enterprises, and the remaining 97% are commercial enterprises.

FIG. 1. Number of enterprises of all forms of ownership (thousands)[10]



[4]Samoilluk M. Tracker of the economy of Ukraine during the war // Center of economic strategy. URL: https://ces.org.ua/tracker-economy-during-the-war/

[5]Inflation Report. October 2023 // National Bank of Ukraine URL: https://bank.gov.ua/admin_uploads/article/IR_2023-Q4.pdf?v=6

[6]Ukraine – Conditions of Return Assessment Factsheet – Round 4 (July–August 2023) // International Organization for Migration. URL: https://dtm.iom.int/reports/ukraine-conditions-return-assessment-factsheet-round-4-july-august-2023

[7]Since mortality data are not published from 2022, the conclusion is based on stable mortality trends from 2015 and the complete absence of factors for its reduction.

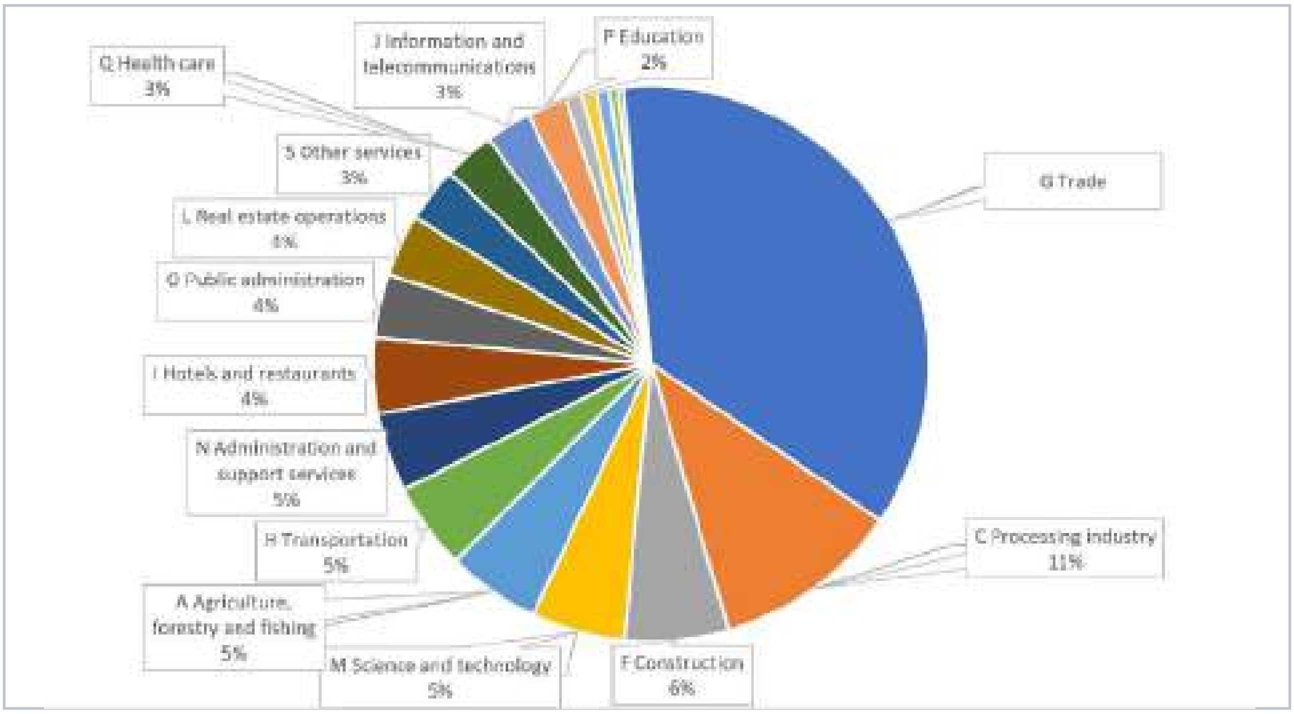
[8]The birth rate in Ukraine has decreased by 28% since the beginning of the full-scale invasion // Opendatabot. URL: https://opendatabot.ua/analytics/birth-crisis-2023

[9]Labour market 2022-2023: state, trends and prospects // https://solidarityfund.org.ua/wp-content/uploads/2023/04/ebrd_ukraine-lm-1.pdf

[10]According to the Pension Fund of Ukraine, 2023

The largest share of enterprises in their total number is made up of enterprises of the trade sector. Their share in the total structure is 36%. This section includes the wholesale and retail (i.e., the sale without processing) of all types of goods and the provision of auxiliary services related to the trade in goods. Wholesale and retail is the final stage in the sale (distribution) of goods. This section also includes the repair of motor vehicles and motorcycles. Processing industry enterprises make up 9%. A significant number of enterprises are concentrated in the sectors of Transport, Agriculture, Administrative Services, Science and Real Estate Operations. It should be noted that the sectors with mainly state-owned enterprises, in particular, Public administration, Education and Healthcare have up to 2% in the total structure of enterprises. A visual distribution of enterprises by types of economic activity is presented in FIG. 2.

FIG. 2. Distribution of enterprises by types of economic activity, as of October 2023, %.

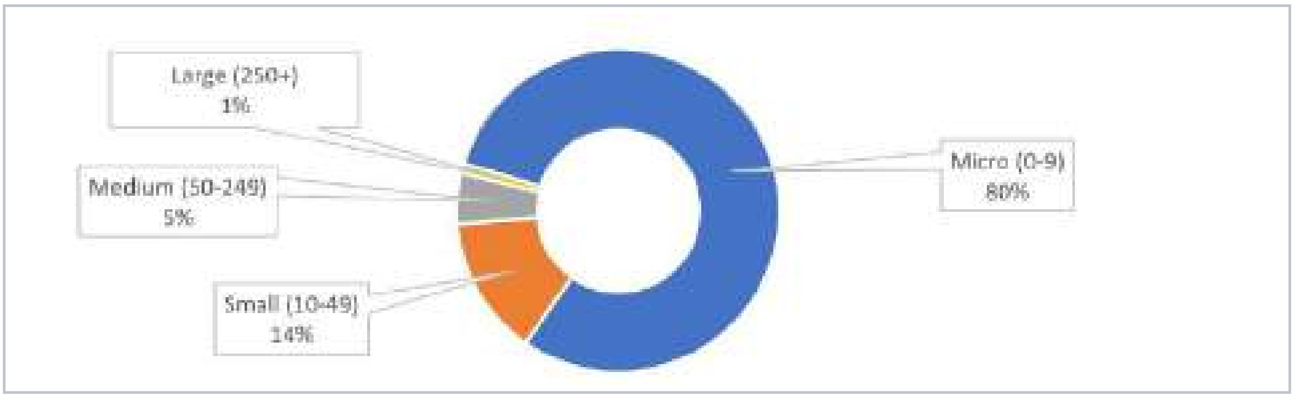


In general, this sectoral structure of enterprises has not undergone significant changes during the last three years. The most noticeable changes occurred in the Trade sector, where the share of enterprises in the overall structure decreased by 2%. For the rest of the sectors, changes in the structure ranged within 1%[11]. At the same time, there were sometimes noticeable spikes or falls within individual sectors. The most significant fluctuations are observed in the 2nd and 3rd quarters of 2021 and the second quarter of 2022. It is obvious that fluctuations in 2021 are connected with the recovery of the economy after the COVID-19 pandemic, and in 2022 - with the beginning of full-scale Russian aggression against Ukraine. A visual distribution of enterprises of all forms of ownership by types of economic activity in % until the previous period is presented in Annex 6.2.2. The number of enterprises of all forms of ownership in % compared to the previous period (Pension Fund of Ukraine, 2023).

It is clear that the indicator of the number of enterprises mostly characterizes the state of small businesses, because in quantitative terms, micro and small enterprises make up 94% of the total number of enterprises. The share of large and medium enterprises is 1% and 5%, respectively.

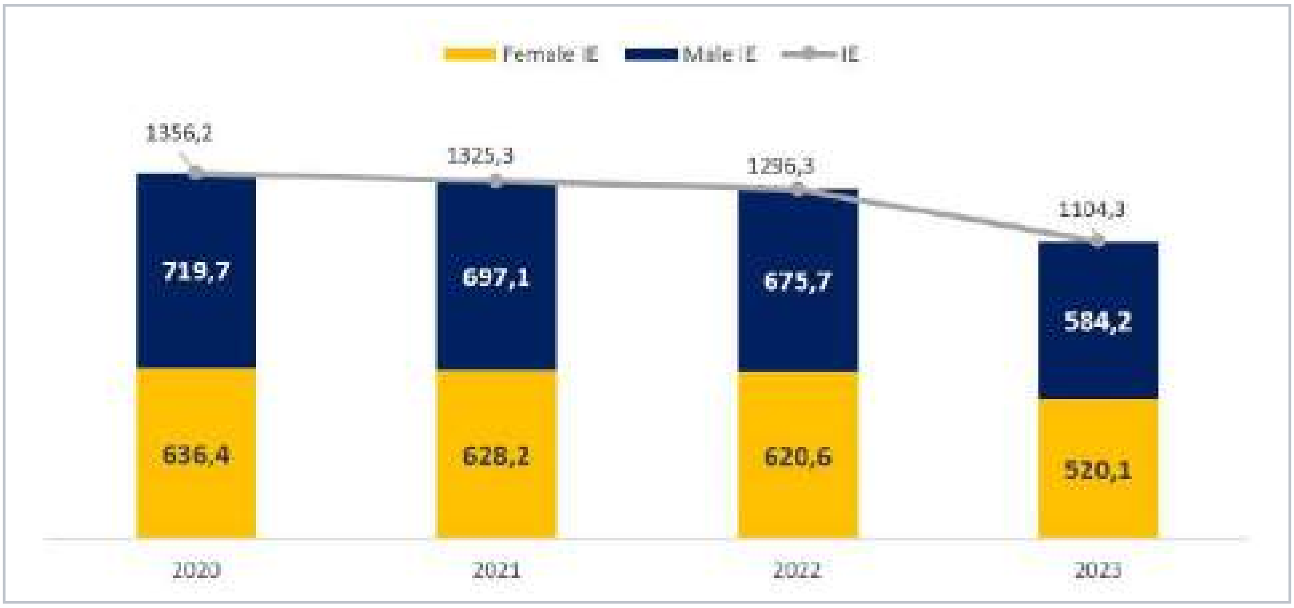
[11] Annex 6.2.1. Structure of enterprises by types of economic activity, %

FIG. 3. Distribution of enterprises by size, % (Q2 2023)[12]



An equally important aspect of small business analysis is the analysis of entrepreneurship and entrepreneurial activity. We note that there are excellent data on the volume and dynamics of entrepreneurship in Ukraine. Thus, according to the data of the Pension Fund of Ukraine, during the last 4 years, the number of IEs in Ukraine has been decreasing. According to these data, in the first quarter of 2023, it amounted to 1.1 million people. In the overall structure, men continue to predominate, however, the rate of reduction of IEs for men is higher than for women. In 2023, the ratio of male and female IEs was almost equal (FIG. 4).

FIG. 4. Number of IE by gender, thousands of people[13]



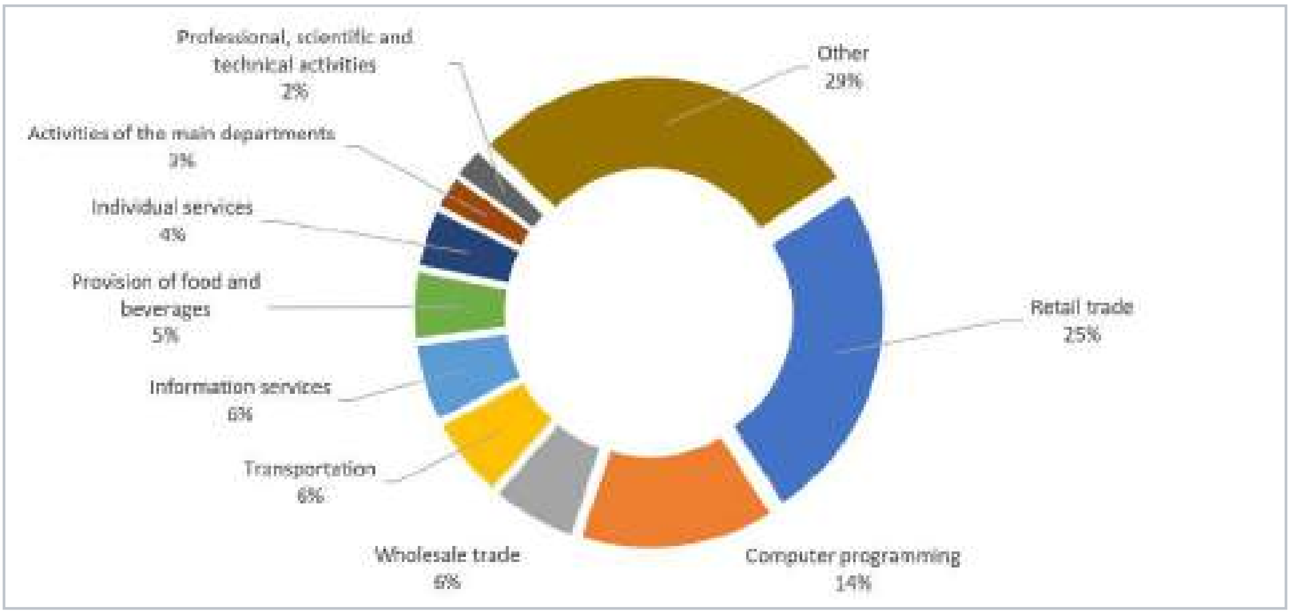
At the same time, according to OPENDATABOT[14] with reference to SE NAIS[15] and automated data processing of the USR, as of September 2023, there are 2,052,326 IEs operating in Ukraine and data on the annual and monthly growth of registered IEs are given. In particular, it is emphasized that for a long period of time in Ukraine, the number of newly opened IEs steadily exceeds the number of closed IEs.

[12]According to the USR.
[13]PFU, 2023
[14]Gig economy during the Great War: the number of IEs in Ukraine reached 2 million // Opendatabot. URL: https://opendatabot.ua/analytics/foponomics-2023
[15]According to SE "National Information Systems". URL: https://nais.gov.ua/

FIG. 5. The ratio of open and closed IEs, thousands of people[16]

According to the given data, during 2022, the largest number of IEs was opened in the field of retail trade (25%). It is worth noting that 14% of open IEs are registered in the field of computer programming. The rest of the registered IEs are scattered among all other sectors of the economy with a share of 6% or less. Visually, the structure of open IEs by scope of activities is presented in FIG. 6.

FIG. 6. The structure of open IEs in 2022 by scope of activities (%)[17]



Data on the opening of new IEs during 2022-2023 are also given. According to the data provided, during 2023, the number of new IEs opened steadily increased every month, and in September 2023 it reached a record number of 35,587 per month[18].

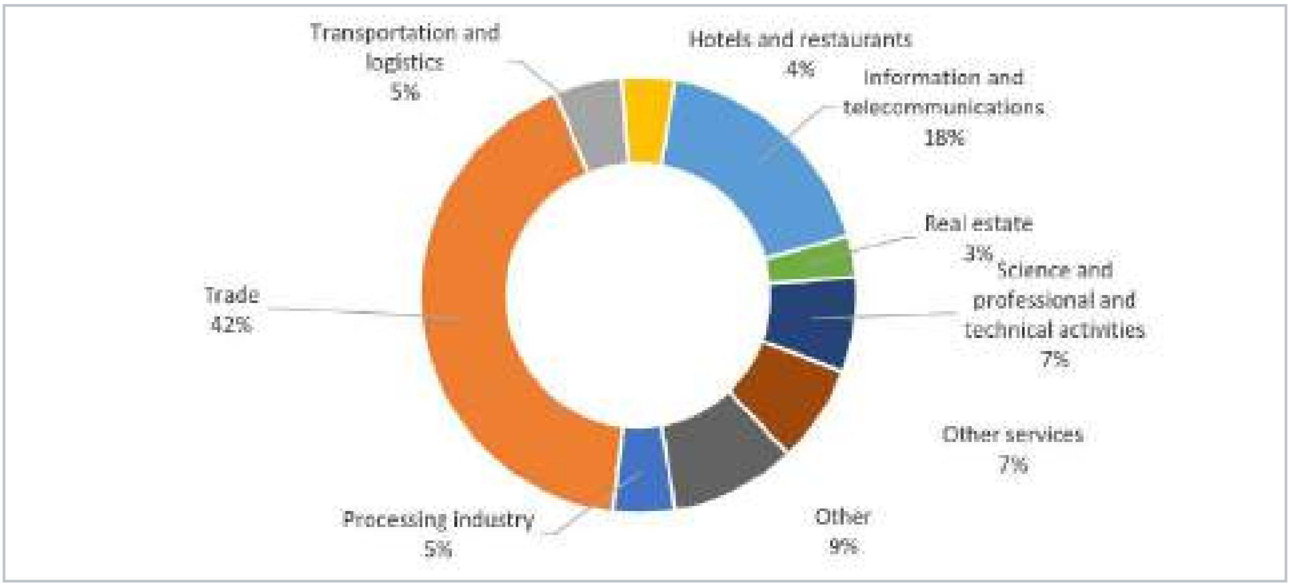
It is certain that the differences between the PFU and USR data can be explained by the technical features of data exchange, as well as the peculiarities of the PFU data accounting for payers. It is also clear that the Unified State Register contains a significant number of non-liquidated, but inactive IEs, and it is currently unknown whether it is possible to select active IEs from the register. Currently, all these features should be further clarified.

[16]The war did not stop business: more new cases are opened than closed // Opendatabot. URL: https://opendatabot.ua/analytics/business-growth-in-war

[17]A non-statistical classification of types of economic activity was used to describe the data, in particular, uneven statistical categories or inappropriate names of types of economic activity were used./ https://opendatabot.ua/analytics/fops-per-waryear

However, according to the data of the Pension Fund, the distribution of operating IEs by types of economic activity has a similar but slightly different structure from the newly created ones.

FIG. 7. The structure of operating IEs by types of economic activity (%)[19]



In particular, it is noted that 42% of operating IEs are trade representatives. At the same time, the Information and telecommunications sector, which includes programmers and other IT specialists, accounts for 18%. A significantly larger share in the structure of operating IEs is occupied by the sectors of Science – 7%, and Other services – 7%.

1.3 Employment by industry type

The general reduction in the number of enterprises that took place during 2022 and the mass emigration of people abroad led to an extraordinary decline in employment in Ukraine. Along with the elimination of jobs during the 3 quarters of 2022, there was a reduction in the number of employees and working enterprises, which took place in the mode of downsizing, the reduction of positions of employees who were dismissed due to mobilization, etc. On average, during 2022, operating companies cut up to 5% of staff on average[20]. From the 4th quarter of 2022 and the 3rd quarter of 2023, there is a process of slow recovery of employment. In general, without taking into account minor fluctuations during the year, from the fall of 2022 to the fall of 2023, up to 500,000 jobs were restored in Ukraine. According to the PFU data, in the 3rd quarter of 2023, the number of employees amounted to almost 10 million.

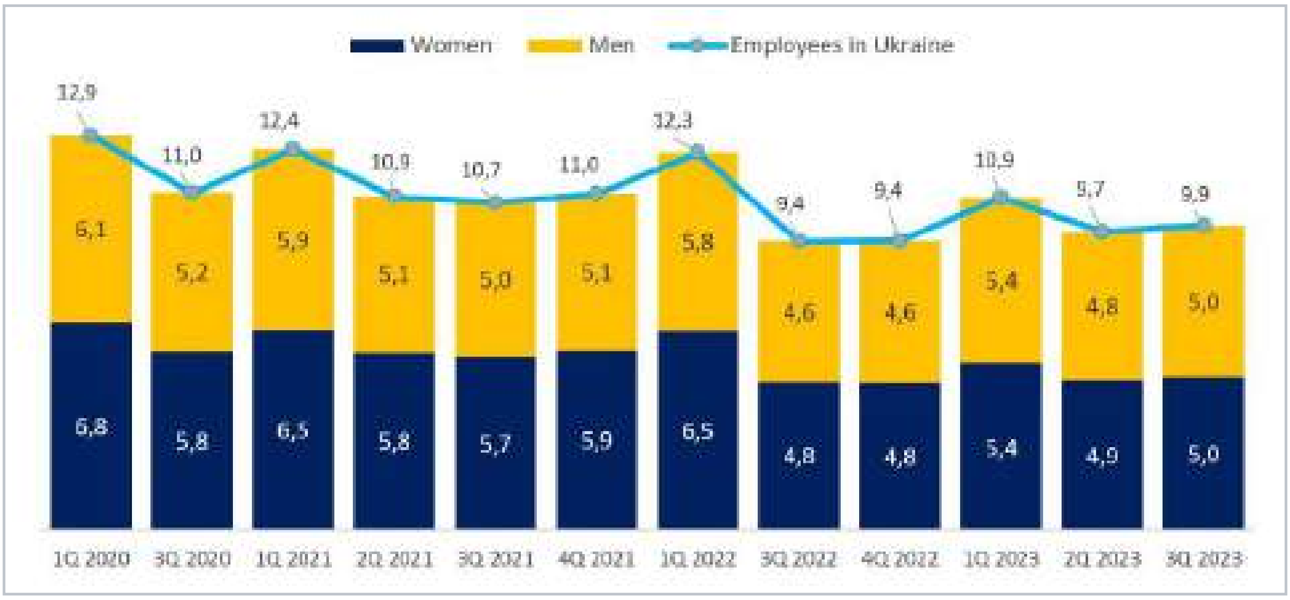
According to the State Statistics Service of Ukraine, according to the results of labour force surveys, the employment rate of women was lower than that of men, and in 2021 it was 43% to 57%, respectively[21] . At the same time, according to the Pension Fund of Ukraine, which publishes data on the total number of employees, the number of employed women was higher than the number of employed men. This difference is explained by a higher proportion of men working informally, and the levelling of the number of working men and women is probably due to the massive migration of women abroad (FIG. 8). Unfortunately, since 2022, labour force surveys have not been conducted in Ukraine due to martial law.

[19] PFU, 2023

[20]Labour market 2022-2023: state, trends and prospects // https://solidarityfund.org.ua/wp-content/uploads/2023/04/ebrd_ukraine-lm-1.pdf

[21]Employment of the population by gender in 2021 (based on the results of the labour force survey) State Statistics Service // www.ukrstat.gov.ua/

FIG. 8. The number of workers in Ukraine by sex, million people[22]



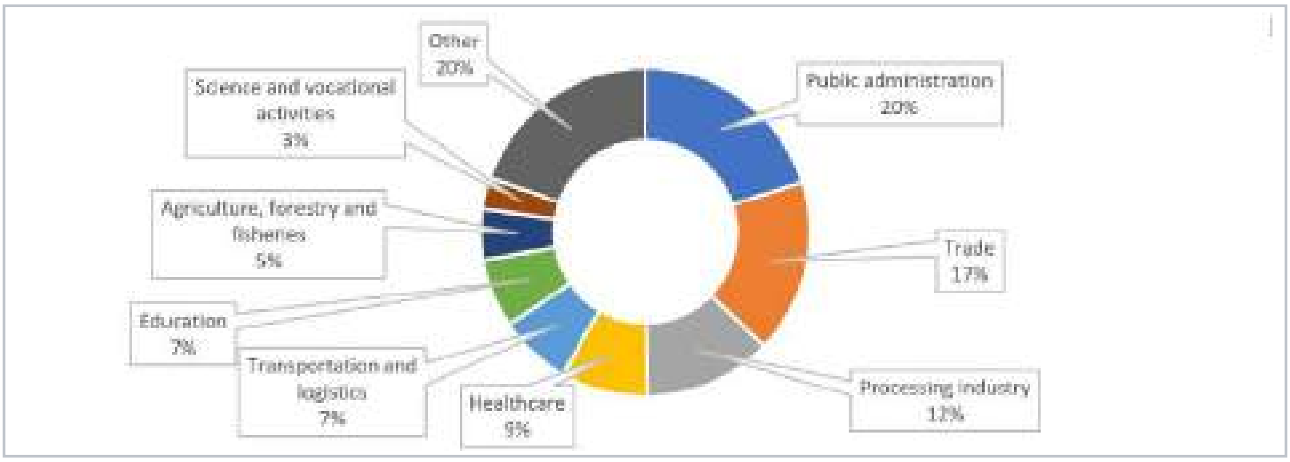
Instead, the wage gap has significantly worsened. If among all working women, the average salary of women is 69% of the average salary of men, then in the budget sector this figure is only 50%. (Annex 6.2.3. Dynamics of average wages among working people, thousand UAH). This situation is explained by a significant increase in the size of the UAF and a significant increase in military salaries, which are significantly higher than the average salary in Ukraine.

In the sectoral structure of employment, insignificant dynamics are observed. After the general decline at the beginning of 2022, a group of sectors continued to gradually reduce the number of employees, as well as a group of sectors that showed a trend of stabilization and growth[23] . The first include the Finance and Insurance, Mining, and Energy sectors. Gradual growth is noted in the Trade, Hotel and restaurant business sectors. Steady growth in employment is noted in the State Administration sectors, which is understandable given the military situation and the needs of the Armed Forces. The rest of the sectors, with minor fluctuations, maintain the level of employment established after the beginning of 2022.

As of October 2023, more than 70% of the sectoral employment structure falls on 7 main sectors. The largest number work in the Public Administration (20%) and Trade (17%) sectors. A significant share of workers is in the Processing Industry (12%), Health Care, Transport, Education and Agriculture sectors (FIG. 9). This distribution has not changed significantly over the past 5 years.

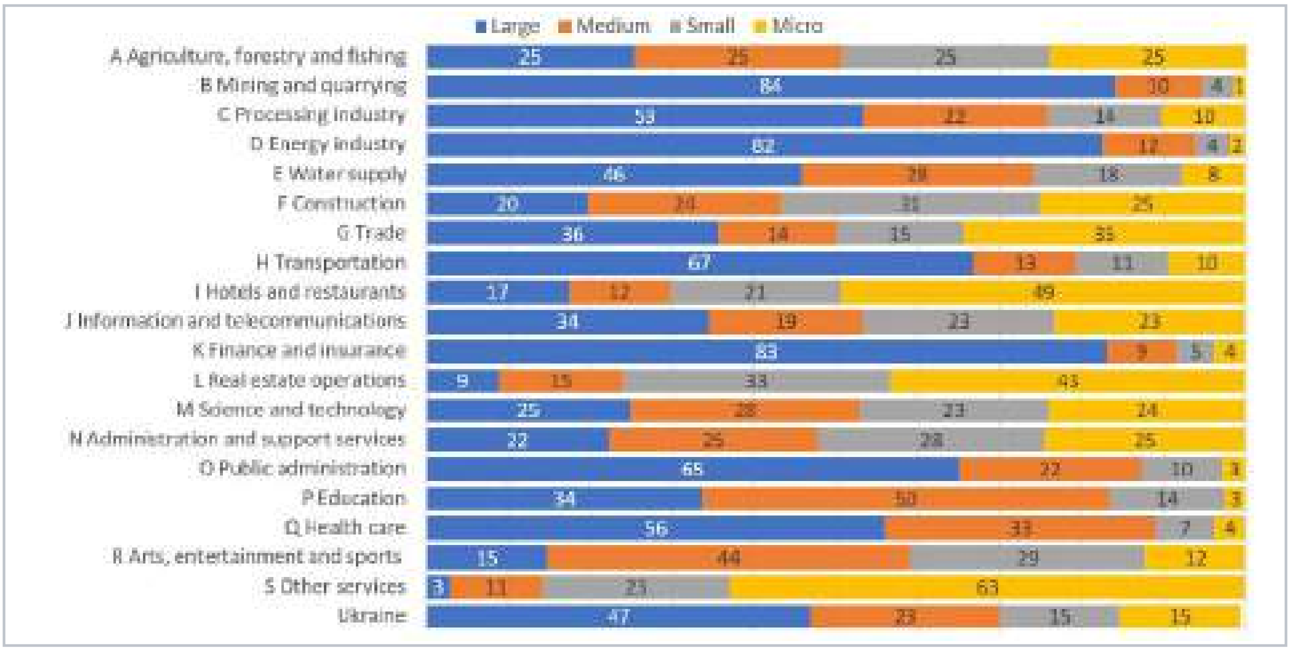
[22] PFU, 2023
[23] Annex 6.2.3.

FIG. 9. Structure of employees by types of economic activity (%)[24]



The distribution of employees by the size of enterprises shows that the basis for employment in Ukraine is large and medium enterprises, which employ a total of 70% of all employees. At the same time, 15% work in small and micro enterprises (FIG. 10).

FIG. 10. Distribution of employees by enterprise size and type of economic activity, %[25]



With FIG. 10 it is obvious that in certain sectors, large enterprises are the leading point of view of ensuring employment. Thus, in the mining industry, energy, finance, transport, healthcare, and processing industry sectors, the share of workers at large enterprises exceeds 50%, in individual enterprises it exceeds 80%. At the same time, in the Service, Hotel and Restaurant business, and Construction sectors, the majority work at small and micro enterprises.

[24] PFU, 2023
[25] USR, 2023

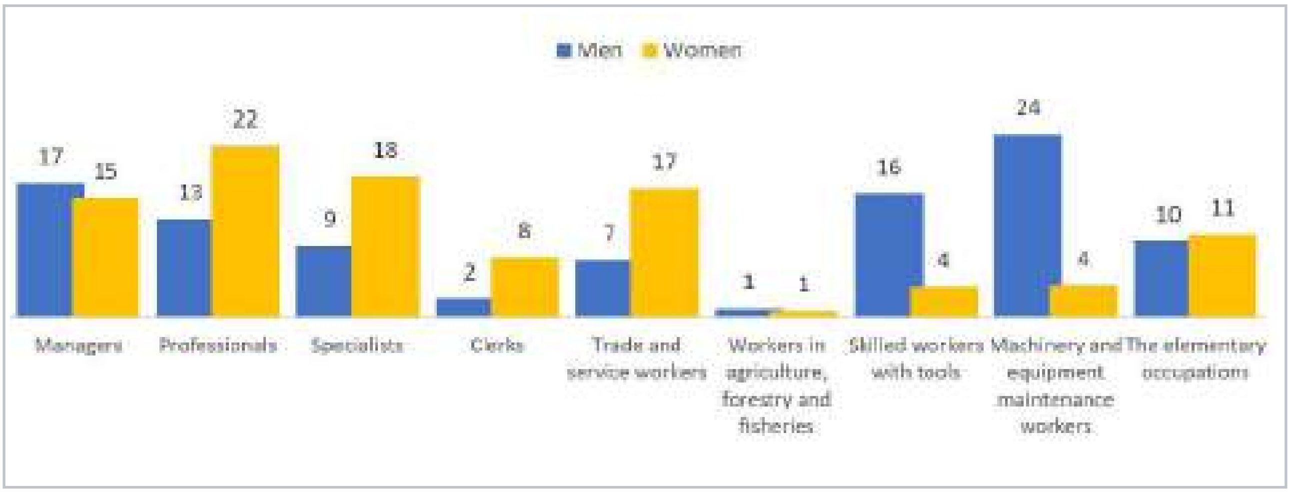
1.4 Occupational composition of employees

The Occupational composition of employees in Ukraine remains stable as a whole. Occupational groups of professionals and managers remain the most numerous groups in Occupational structures, accounting for 18% and 16%, respectively. The share of the Occupational group of specialists is 14%, and the groups of machine maintenance workers and trade workers are 13% and 12%, respectively.

Occupational groups of skilled workers with tools and the simplest professions have 10% in the composition of employees.

Significant differences are noted in the Occupational composition by gender. For example, the share of women significantly exceeds men in the Occupational groups of Professionals, Specialists and Trade Workers. At the same time, there are significantly more men in the composition of the Occupational groups of managers, skilled workers with tools, and Workers for the maintenance of machines and equipment.

FIG. 11. Occupational composition of employees by gender, %[26]



Unfortunately, there are still no data in Ukraine to assess the dynamics of the Occupational composition. Information on the composition of working persons is formed by the PFU based on the availability of information on the professional title of the job in the information on labour relations from 2018 to the present. Currently, these data cover up to 60% of the employed, however, given the fact that the data do not cover all employed and are constantly renewed, the comparison of the professional quantitative composition of Occupational groups is still unreliable.

1. Currently, the most numerous occupations in Ukraine are:
2. Motor vehicle driver
3. Specialist(civil servant, clerk)
4. Seller of food products
5. Teacher of general secondary education institution
6. Office cleaner
7. Sales manager
8. Security guard
9. Specialist of the state service of local self-government
10. Accountant

[26] PFU, 2023

Significant differences are noted in the most numerous occupations for men and women.

TABLE 1. The most numerous professions among employees by gender[27]

Women	Men
Seller of food products	Motor vehicle driver
Office cleaner	Security guard
Teacher of general secondary education institution	Director, chief, other head of the enterprise
Specialist	Security guard
Accountant	Specialist(civil servant, clerk)
Sales manager	Auxiliary worker
Specialist of the state service of local self-government	Tractor driver of agricultural and forestry production
Nurse	Maintenance fitter
Seller of non-food products	Loader
Cook	Engineer

1.5 Dynamics of labour demand

In 2023, there was a significant increase in labour demand. This is noted by both private recruitment companies and the state employment service. Thus, according to Work.ua, the number of job vacancies continues to grow in 2023 and reached 105,000 in September. This is the highest figure since the beginning of the full-scale invasion.[28]

More than half (62%) of all job offers in Ukraine were made in the following regions: Kyiv, Dnipropetrovsk, Lviv, Odesa, and Kharkiv regions.[29]

The most job vacancies are created in Retail trade, Sales and purchase, as well as for blue-collar jobs and the service industry. In August, the number of job vacancies in the Logistics and Hotel and restaurant business, tourism categories crossed the 10,000 mark.[30]

In absolute numbers, the largest number of job vacancies in August is noted by professions — accountant (3,334 vacancies), cook (3,447), driver (3,504), sales representatives (6,608), sales manager (8,591).[31]

Work.ua analysts note that "... in August 2023, it became noticeable how employers react to the personnel shortage. The share of job vacancies for people with disabilities (+17%, 7,978 vacancies), students (+18%, 19,507), veterans (+26%, 4,936) and pensioners (+27%, 3,505) increased significantly. Employers are also more willing to work with candidates without experience (+19%, 36,196)...".[32]

[27] PFU, 2023
[28] Review of the economic front: candidate activity in job search is declining, even in IT // Opendatabot. URL: https://opendatabot.ua/analytics/business-in-war-september-2023
[29] There are more than 100,000 vacancies on the labour market, but there is a staff shortage. Research by Work.ua. URL: https://www.work.ua/articles/analytics/3169/
[30] There are more than 100,000 vacancies on the labour market, but there is a staff shortage. Research by Work.ua. URL: https://www.work.ua/articles/analytics/3169/
[31] There are more than 100,000 vacancies on the labour market, but there is a staff shortage. Research by Work.ua. URL: https://www.work.ua/articles/analytics/3169/
[32] There are more than 100,000 vacancies on the labour market, but there is a staff shortage. Research by Work.ua. URL: https://www.work.ua/articles/analytics/3169/

A similar situation is noted in SES. In particular, as before the war, the labour market of Ukraine observes an increased demand for qualified representatives of vocational professions and trade workers. The level of remuneration for the corresponding vacancies offered by employers is also gradually increasing.

The only job portal , which was created by the joint efforts of the State Employment Service and six leading Ukrainian job search sites and has more than 220,000 job offers every day, presents the following list of Top 10 professions by the number of available job offers:

1. sales manager – 9379 vacancies;
2. sales representative - 7416;
3. cook - 6057;
4. accountant - 5962;
5. loader - 4346;
6. doctor - 3385;
7. seamstress - 2812;
8. barista - 2382;
9. motor vehicle driver - 2336;
10. engine operator - 2030.

As of September 25, 2023, there are 65,000 current job vacancies in the database of the SES. From the occupational point of view, the most job vacancies were submitted by employers for employment of:

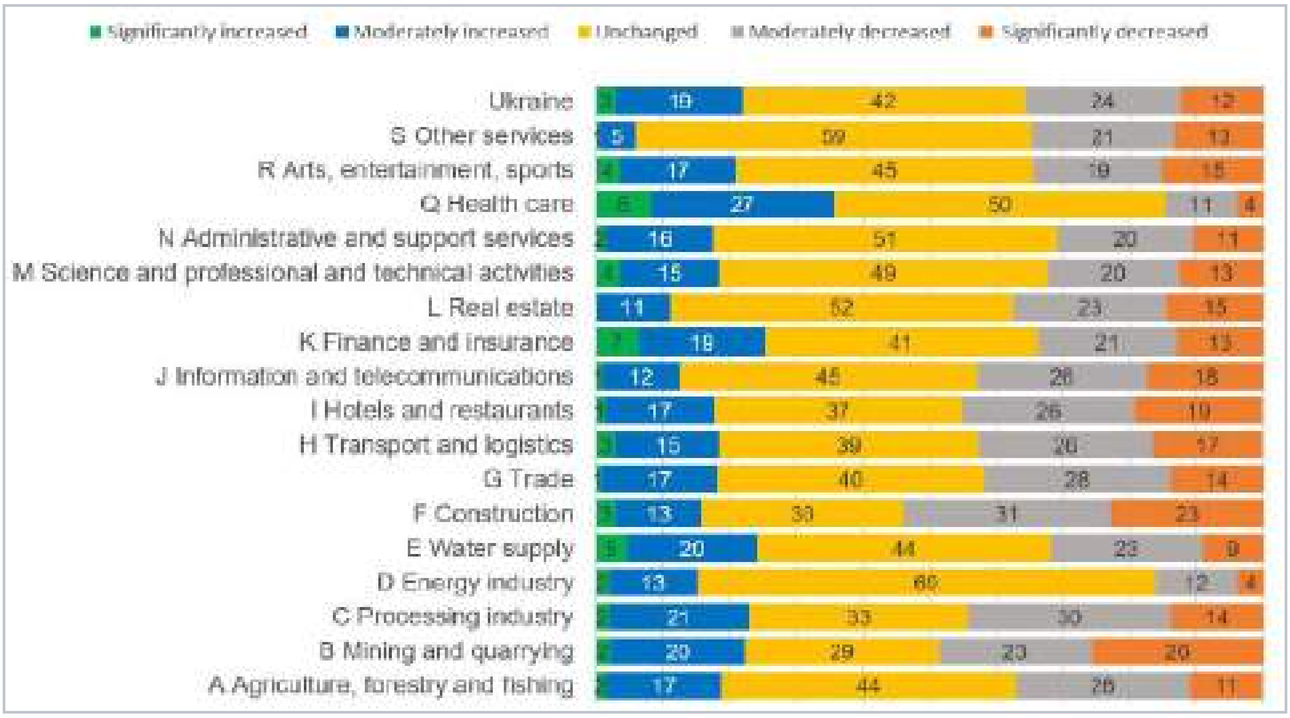
- skilled workers with tools - 21% of all submitted job vacancies (seamstress, electrician for repair and maintenance of electrical equipment, maintenance fitter, internal plumber, electric and gas welder, repairman of wheeled vehicles, baker, painter)
- workers in the maintenance and operation of equipment and machines - 16% (driver, turner, agricultural tractor-machinist, tractor driver, gas station operator, road worker, excavator driver, loader driver, milling machine operator, machine operator, crane operator;
- trade and service workers - 15% (cook, seller of food and non-food products, sales manager, security guard, waiter, assistant nurse, bartender, social worker, hairdresser);
- professionals – 14% (teacher, educator, lecturer, pharmacist, general practitioner-family doctor, engineer, practical psychologist);
- specialists - 11% (teacher's assistant, accountant, medical nurse, educator's assistant, master of vocational training, mechanic, chef, district electrician).
- unqualified workers - 11% (auxiliary worker, cleaner of office and service premises, worker for complex cleaning of buildings, loader, janitor, stacker-packer, improvement worker, site cleaner, watchman).

1.6 Available and expected volumes of production

During 2023, the volumes of production/works/services/ for the majority of enterprises (42%) did not undergo significant changes. At the same time, in general, the share of enterprises in Ukraine that indicated a certain reduction (36%) in the volume of production/works/services is slightly higher than those that indicated an increase (22%). According to survey data, 24% of enterprises indicated a moderate reduction in the volume of production/works/services in Ukraine overall, and 12% indicated a significant reduction. 19% of enterprises indicated a gradual increase in production, and only 3% noted a significant increase.

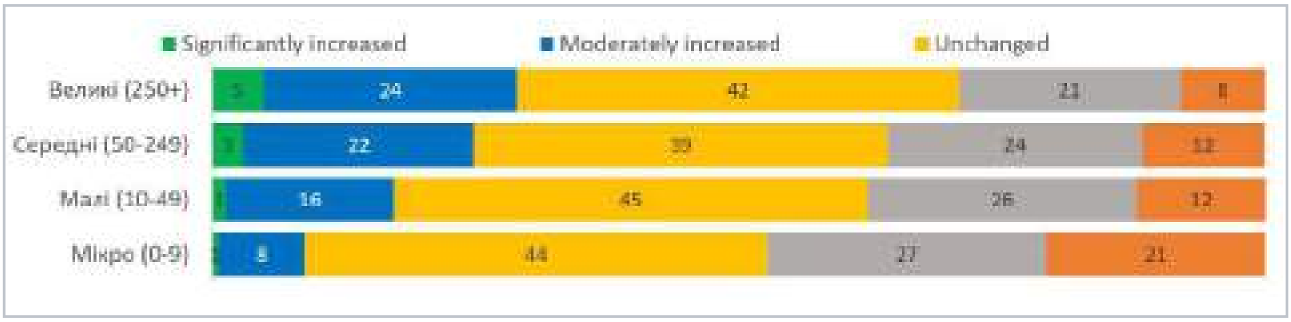
The indicated situation is generally true for most sectors of the economy. A relatively better situation is noted in the Health Care, Finance, Water Supply and Energy sectors. The largest share of enterprises indicating a reduction in production volumes is noted in the Construction, Mining and Processing industry sectors. It is worth noting that in all sectors of the economy there is a segment (up to 8%), which indicates a significant increase in production volumes.

FIG. 12. Estimate of the volumes of production/execution of works/provision of services in 2023 by types of economic activity, %



A relatively better situation is observed in the segments of large enterprises, where the share of enterprises showing an equal distribution between growth and reduction, however, the share of enterprises that indicated a significant reduction outweighs the share of significant growth. The situation is relatively worse in the segments of small and micro enterprises, where 38% and 48%, respectively, point to a reduction in the volume of production/works/services.

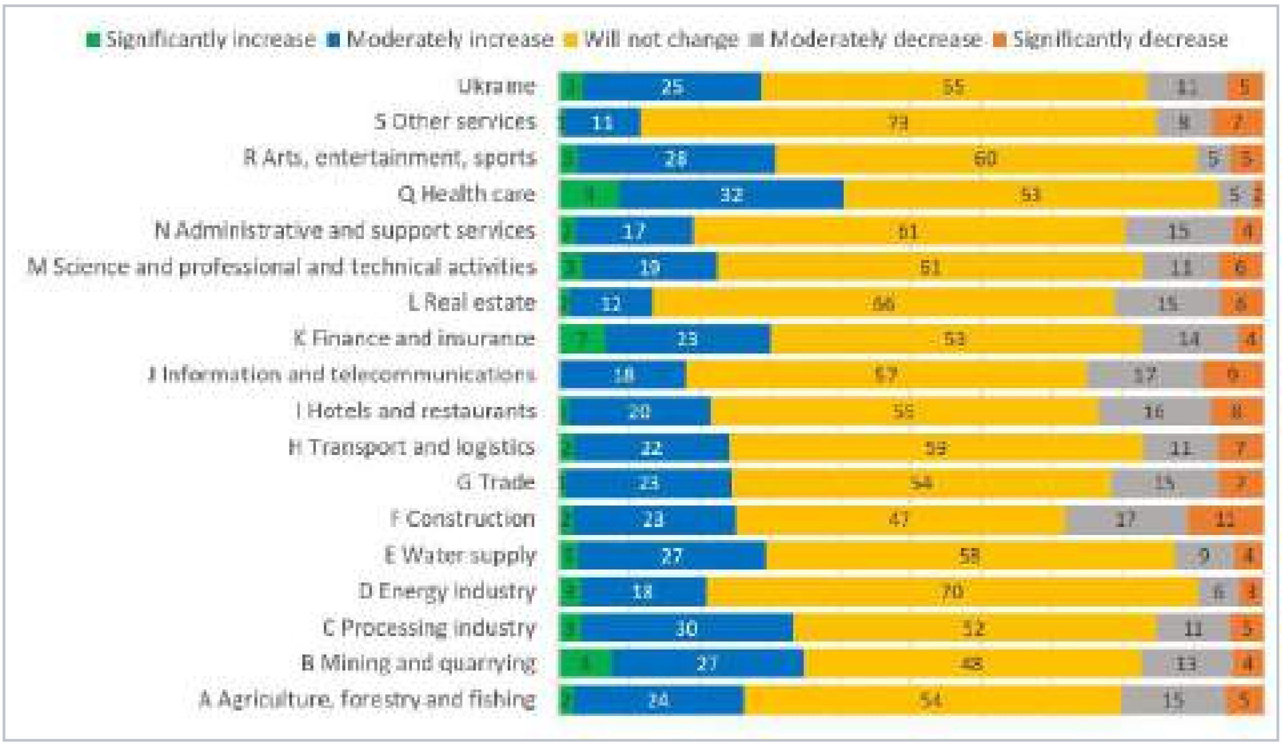
FIG. 13. Estimate of production volumes/execution of works/provision of services in 2023 by the size of enterprises, %



In terms of regions, the situation was relatively better in the western regions. In particular, Volyn, Rivne, Zakarpattia, Ivano-Frankivsk, and Lviv regions. A very difficult situation remained in Mykolaiv, Kharkiv, Dnipropetrovsk and Zaporizhzhia regions. According to the provided estimates, the most difficult situation is noted in Kherson region. Details of estimates of production volumes by region are provided in Annex 6.2.4. Estimated production volumes in 2023 by region, %

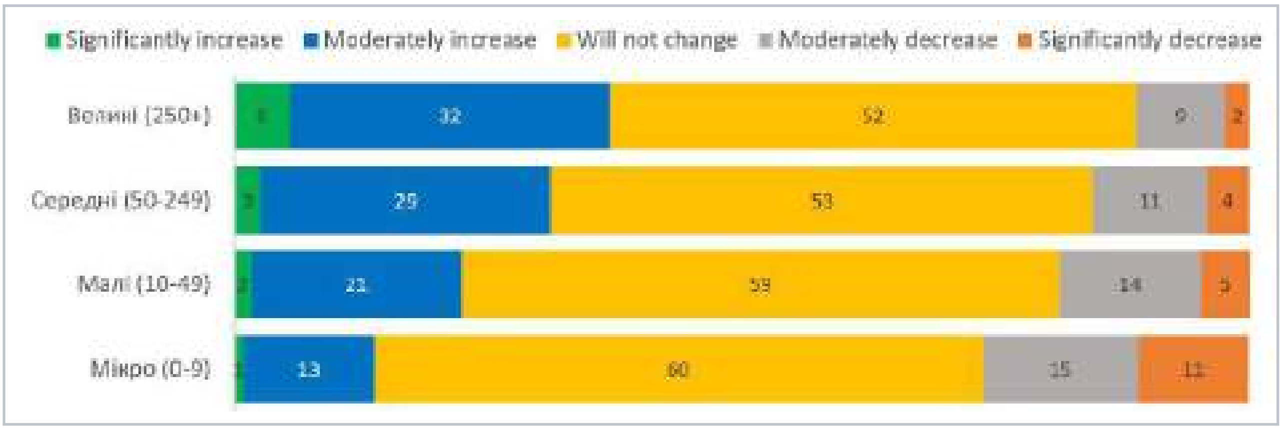
According to the results of the survey, companies in general remain optimistic about the future. Thus, it can be stated that positive and neutral expectations significantly outweigh pessimistic assessments. In Ukraine as a whole, 16% of enterprises indicated negative expectations regarding the volume of production/works/services. At the same time, 55% indicate that they do not expect changes, and 28% expect growth, of which 3% await a significant increase in production volumes. The largest share of negative expectations is noted among enterprises in the Finance and Construction sectors. Positive expectations of enterprises regarding the growth of production volumes are noted in the mining and processing industry sectors.

FIG. 14. Estimate of the expected volumes of production/execution of works/provision of services in 2024 by types of economic activity, %



More positive expectations regarding the development of the situation in 2024 are expressed in the segments of large enterprises. More than 38% of large enterprises expressed expectations of moderate (32%) and significant (6%) growth in production volumes. At the same time, 11% of large enterprises expect a reduction in production volumes in 2024.

FIG. 15. Estimate of expected volumes of production/performance of works/provision of services by size of enterprises, %



More modest estimates are given by small and micro enterprises. Thus, more than 19% of small and 26% of micro enterprises expect a reduction in production volumes. At the same time, up to 60% of enterprises expect neither positive nor negative changes. Positive expectations of growth in production volumes outweigh negative expectations in the segments of small enterprises, which account for 23%. Among micro enterprises, the share of positive expectations is smaller than the share of negative ones and amounts of14%.

Estimates of expected changes in the volume of production/works/services are generally similar to estimates for the current year. As a whole, more positive expectations are noted in the western regions of Ukraine. Less optimistic estimates are given in regions bordering the Russian Federation; however, it can be noted that optimistic estimates generally prevail. Separately, we can note the positive attitude of the enterprises of Donetsk and Dnipropetrovsk regions. Details of estimates of production volumes by region are provided in Annex 6.2.5. Estimated changes in production volumes in 2024 by region, %.

1.7 Digitalisation

The process of digitalisation of the economy in Ukraine is taking place quite actively. Every year, the range of digital technologies used in production processes is expanding significantly. The approach used in this study is based on the Digital Economy and Society Index (DESI) methodology and includes 7 out of 12 indicators of the Digital Intensity Index.

Their comparison allows us to conclude that Ukrainian enterprises are generally close to the average European level of digitalisation. The largest differences are observed in the MSME segment, where the values for the main indicators are sometimes significantly lower than the European average.

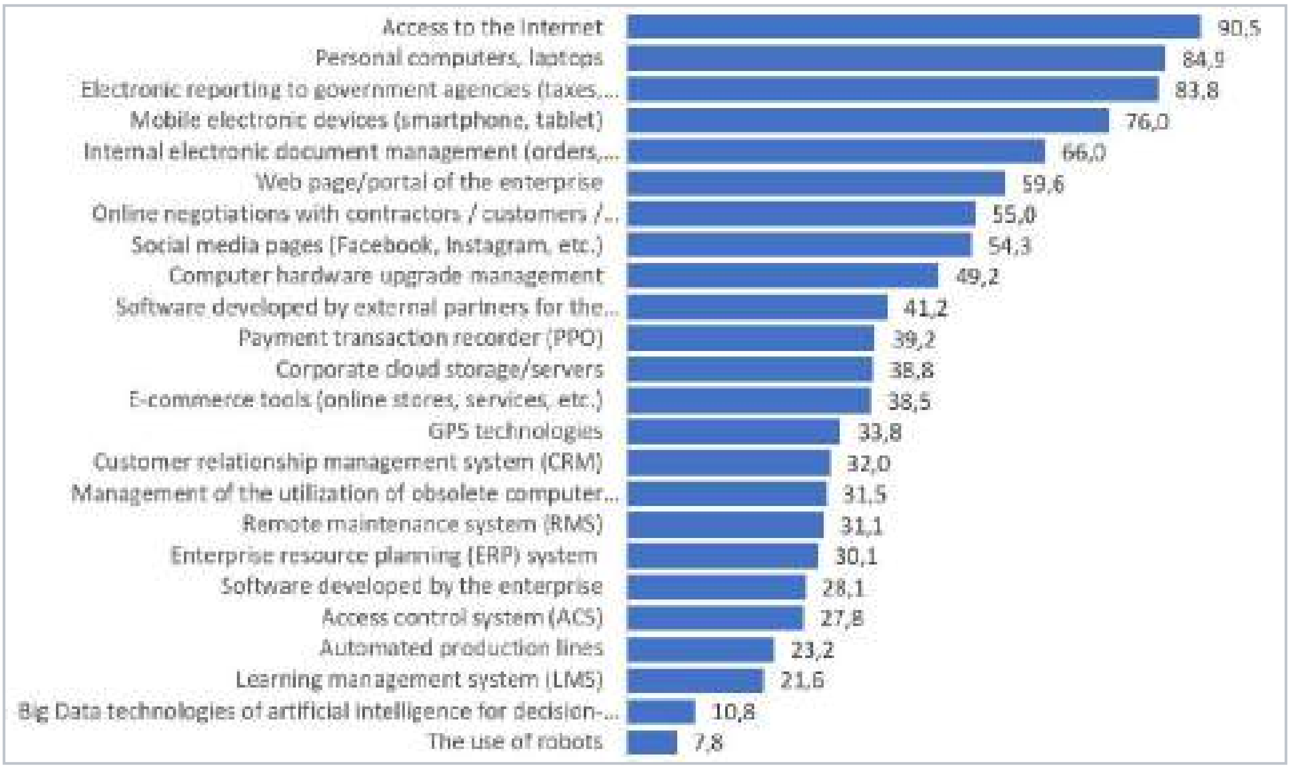
TABLE 2. Digital Intensity Index separate indicators tracking digitalisation processes in EU[33] and Ukraine 2023[34] , % enterprises

Indicator	Large enterprises		SME	
	European Union 2022	Ukraine 2023	European Union 2022	Ukraine 2023
The maximum contracted download speed of the fastest fixed line internet connection is at least 30 Mb/s	95	97	80	81
Use any social media	83	68	58	34
Enterprises where more than 50% of the persons employed used computers with access to the internet for business purposes	58	53	49	39
Use of any cloud service	72	55	40	18
Have ERP software package to share information between different functional areas	81	44	37	13
Have CRM	65	44	34	16
Use any AI technology	28	16	28	4

According to survey data, more than 90% of companies use modern technologies in production processes. The most common are the use of personal computers and access to the Internet. It is important to note the widespread use of electronic reporting to state bodies, which indirectly indicates the level of digitalisation of state authorities. Also noteworthy is the segment of enterprises, which notes the active use of state-of-the-art technologies of artificial intelligence and robotics, which makes up 10% of enterprises.

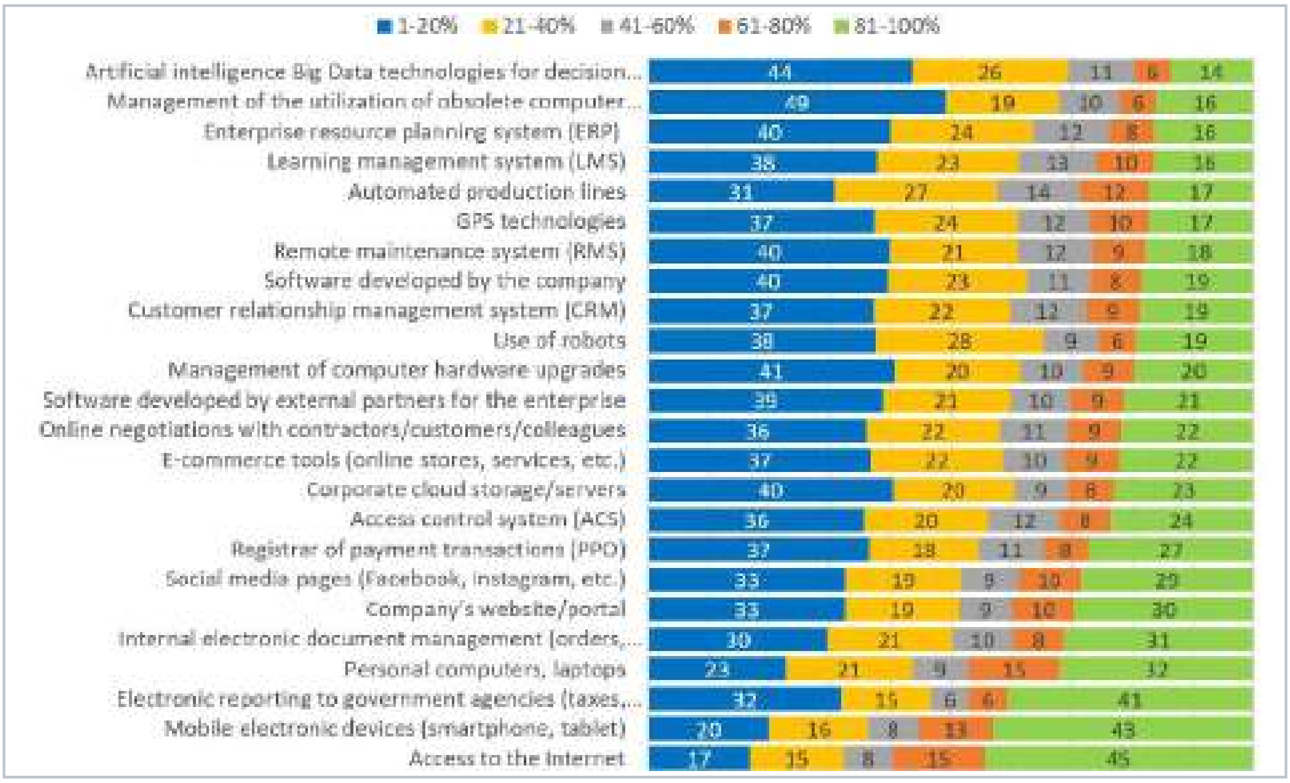
[33] Digital Economy and Society Index (DESI) 2022, p49 // https://digital-strategy.ec.europa.eu/en/policies/desi
[34] Survey of Employers, 2023

FIG. 16. The share of technology/tools/devices used in production processes, %



In general, it is possible to note a fairly high level of involvement of company personnel in the use of digital technologies to perform work tasks. Depending on a certain technology, the share of enterprises where up to 100% of the staff use this technology ranges from 14% to 45%

FIG. 17. Share of company personnel using technology / tool / device to perform work tasks,% (33056)



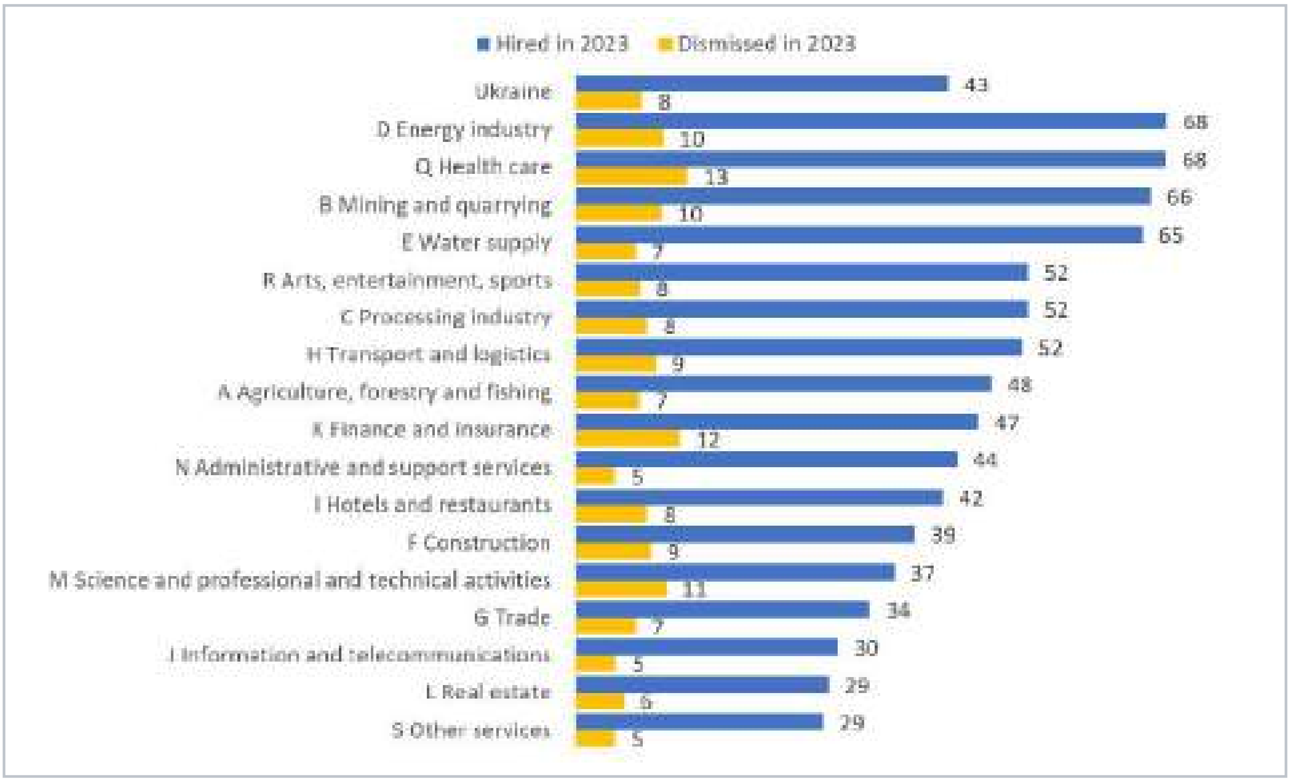
Such a situation leads to a significant increase in the demand for digital skills of various levels and constantly puts forward new requirements for the quality of personnel.

2 Current and prospective staffing needs

2.1 Volumes and structure of employment

According to the results of the survey, on average, 43% of enterprises in Ukraine hired personnel in 2023. At the same time, more than 8% indicated that they were cutting staff. Most of all, the employment of workers is noted in the sectors of Energy, Health Care, Extractive Industry and Water Supply. In these sectors, the share of enterprises recruiting employees exceeds 60%. Along with this, it is precisely in these sectors that a relatively high level of reductions is noted. This is because these sectors mostly involve large enterprises that are represented in several regions, where quite significant changes can occur during the year. The smallest share of enterprises hiring employees is noted in the Real Estate, Services and Information sectors. Meanwhile, the smallest share of reductions is noted in these sectors.

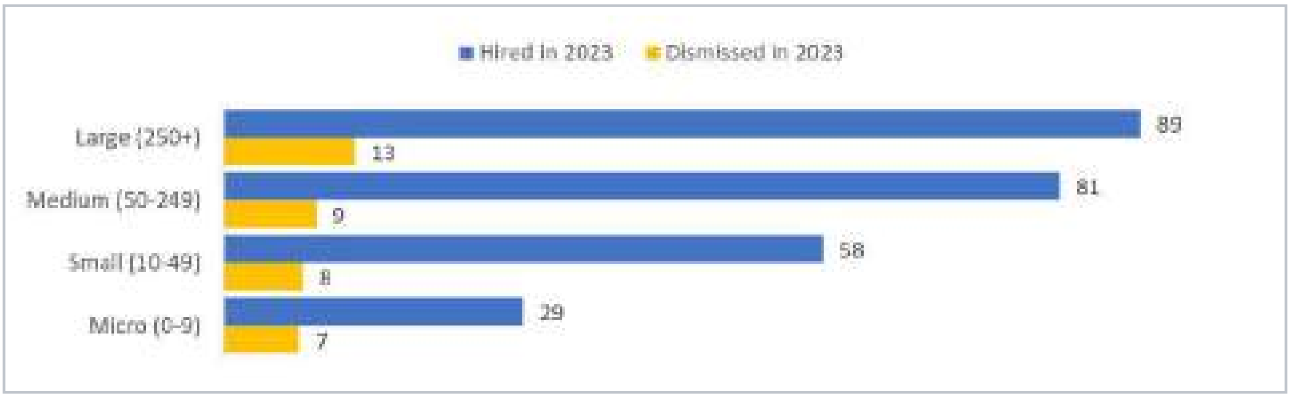
FIG. 18. Enterprises that hired and reduced employees in 2023, by types of economic activity, %



The largest share of enterprises hired personnel during 2023 is noted in the segment of large enterprises (89%). At the same time, more than 13% indicated that they had made employees redundant. In general, in the segments of large and medium enterprises, there are virtually no enterprises that did not change (hire or reduce) personnel during 2023.

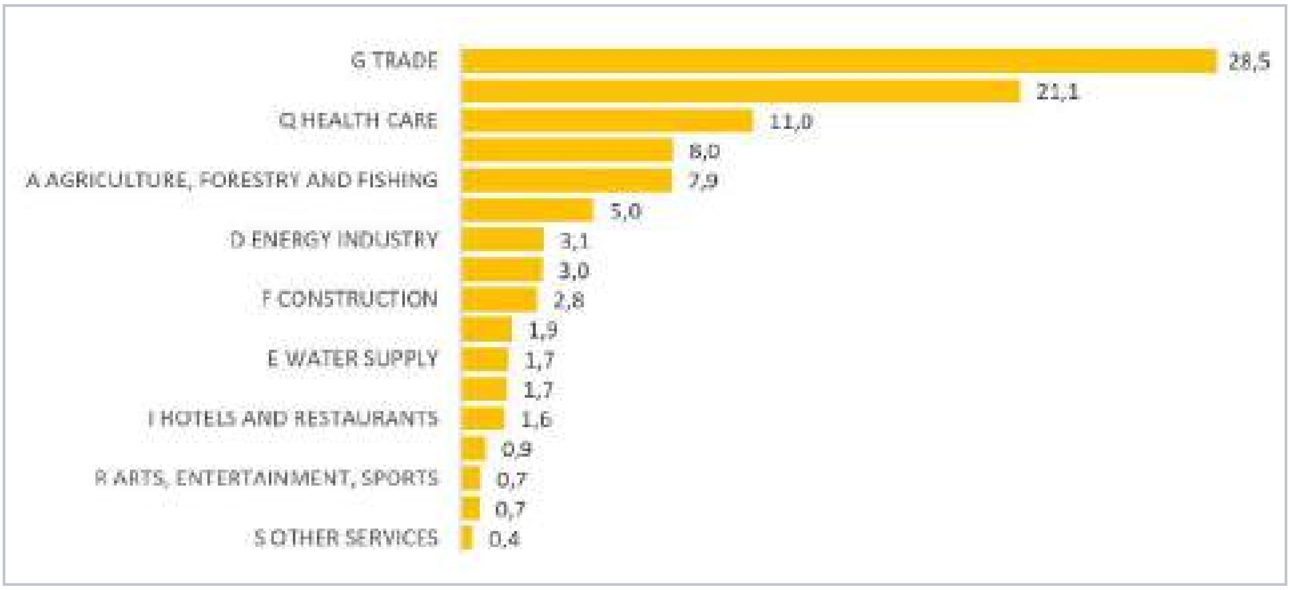
In the small business segment, the situation is heterogeneous. Thus, more than half of small enterprises (58%) hired workers and only 8% made reductions. At the same time, less than a third (29%) employed employees in the micro-enterprise segments, while 7% of enterprises noted that they were reducing employees during 2023. We can certainly note a significant segment in enterprises that did not show any changes. This applies to more than 34% of small and 64% of micro enterprises, which may have different explanations.

FIG. 19. Enterprises that hired and reduced employees in 2023, by enterprise size, %



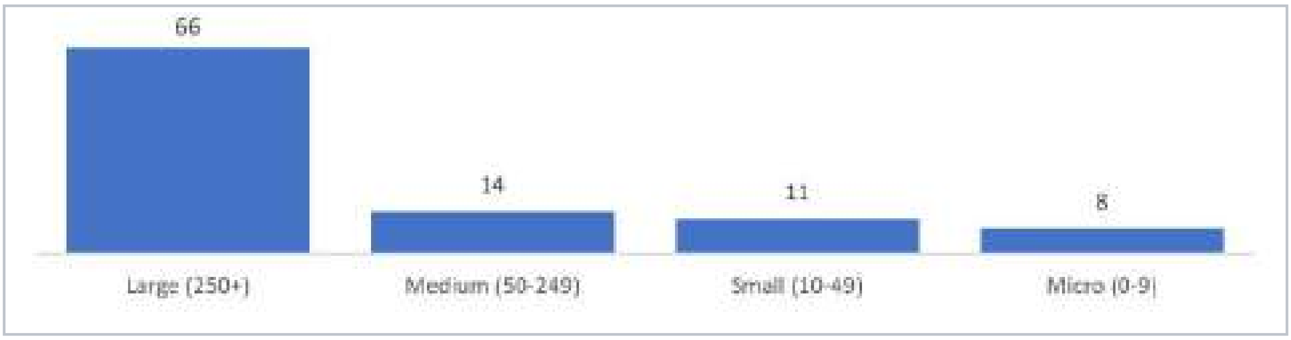
The total number of full-time employees hired in 2023 in Ukraine was 13.8%[35] of the total number of employees. Almost half of all hired full-time employees were in the Trade and Processing sectors.

FIG. 20. The total volume of employed workers during 2023, by types of economic activity, %



The vast majority of hired workers (66%) belong to large companies. Medium, small and micro enterprises account for 14%, 11%, 8% of all employed full-time employees.

FIG. 21. The total volume of employed workers during 2023, by size of enterprises, %



[35] In total, in the course of the research, employers indicated 295 thousand hired workers, but only for 185 thousand were able to obtain information in terms of professions.

In general, the share of women in the total number of employees hired during 2023 was 47.1%. The largest share of employed women is noted in the sectors of health care (70%), finance (70%) and hotel and restaurant business (66%). More than half of women in the total composition of employed workers were employed in the Trade (55%) and Science (50%) sectors. The fewest women were employed at enterprises in the Construction, Information, and Mining sectors.

A rather low share of young people under the age of 25 is notable in the employment structure. On average, the share of employed youth in Ukraine was less than 13%. The largest share of young people in the employment structure is noted in the Finance (22%), Hotel and restaurant business (17%) and Trade (16%) sectors.

The issue of employment of vulnerable population groups remains very problematic. According to the results of the survey, the average share of employed IDPs in Ukraine was 5% of the total number of employed workers. The share of employed persons with disabilities was 4%, and war veterans did not reach 1%. The largest share of IDPs was employed at enterprises in the Mining Industry and Information sectors. The overall distribution of employees hired during 2023 by sector is presented in the following table

TABLE 4. Percentage of vulnerable groups in the total number of employees hired in 2023, by regions, %.

Sectors	Percentage of vulnerable groups in the total number of employees hired in 2023 by type of economic activity, %.					
	Women	Youth under 25 years old	Internally displaced persons	Persons with disabilities	Veterans	Graduates of vocational schools
Ukraine	47.1	12.8	5.2	3.9	0.8	3.4
A Agriculture, forestry and fishing	33.5	8.9	2.6	4.2	0.7	2.5
B Mining and quarrying	23.5	16.4	10.5	3.3	0.6	5.8
C Processing industry	44.5	13.0	5.2	3.6	1.1	4.5
D Energy industry	34.3	6.0	3.9	5.5	1.0	3.2
E Water supply	34.1	4.7	4.3	4.6	0.9	2.2
F Construction	13.7	8.9	4.5	5.1	1.3	7.9
G Trade	54.6	16.3	5.4	3.3	0.5	2.9
H Transport and logistics	36.8	9.2	3.9	3.5	1.0	2.8
I Hotels and restaurants	65.6	17.2	6.3	2.6	0.8	4.7
J Information and telecommunications	22.9	12.7	6.9	4.3	0.4	0.4
K Finance and insurance	70.3	22.7	5.9	3.9	0.8	1.4
L Real estate	40.3	4.3	5.0	4.3	1.0	1.1
M Science and professional and technical activities	50.7	13.4	4.3	4.9	1.3	1.9
N Administrative and support services	38.6	6.6	4.0	3.8	0.9	1.6
Q Health care	70.3	12.5	6.6	4.8	0.8	3.6
R Arts, entertainment, sports	48.5	18.8	5.0	2.1	0.5	2.2
S Other services	49.7	8.4	3.7	2.9	0.6	1.2

It is worth noting that there is a noticeable share of vocational training graduates in the structure of those hired. On average in Ukraine, it was 3%, which probably characterizes not so much a significant share of young people but a generally low level of employment. At the same time, the largest share of employed graduates is in the construction, mining and processing industry sectors, as well as the hotel and restaurant business.
The situation is similar in content in the vast majority of regions. Most of the regions have little variation from the national average.

TABLE 4. Percentage of vulnerable groups in the total number of employees hired in 2023, by regions, %

Sectors	Percentage of of vulnerable groups in the total number of employees hired in 2023 by type of economic activity, %.					
	Women	Youth under 25 years old	Internally displaced persons	Persons with disabilities	Veterans	Graduates of vocational schools
Ukraine	47.1	12.8	5.2	3.9	0.8	3.4
Cherkasy	39.7	9.7	3.9	6.0	1.2	5.6
Chernihiv	37.3	8.6	1.4	5.2	1.0	1.6
Chernivtsi	43.1	21.0	2.8	4.2	0.4	2.5
Dnipropetrovsk	45.6	13.4	7.3	2.2	0.8	3.8
Donetsk	49.5	8.7	10.4	3.8	0.6	3.1
Ivano-Frankivsk	53.0	13.3	4.5	4.5	2.3	4.8
Kharkiv	48.7	10.9	6.0	4.5	0.9	4.1
Khmelnytskyi	16.3	4.3	1.2	3.3	0.2	1.1
Kherson	43.1	2.6	3.9	3.1	0.5	2.2
Kirovohrad	50.2	8.1	4.6	3.6	1.1	2.8
Kyiv city	52.4	17.3	6.3	3.3	0.6	2.2
Kyiv region	60.2	9.8	3.7	6.0	0.4	3.4
Luhansk	48.3	11.1	46.0	3.8	0.0	6.0
Lviv	58.2	18.4	6.3	4.4	0.7	5.9
Mykolaiv	38.4	4.8	4.6	3.0	0.6	3.9
Odesa	46.0	12.0	5.8	3.5	1.5	2.7
Poltava	45.0	12.9	4.9	3.6	0.8	3.5
Rivne	44.6	13.1	2.8	4.4	0.5	4.6
Sumy	39.6	11.1	2.2	3.2	1.0	4.6
Ternopil	43.5	12.9	5.2	5.2	0.6	4.7
Vinnytsia	46.0	13.6	5.2	3.8	0.9	3.4
Volyn	47.0	16.3	7.7	5.2	1.1	4.9
Zakarpattia	49.7	16.7	2.6	2.5	0.4	2.6
Zaporizhzhia	46.3	7.7	7.1	3.0	0.9	1.2
Zhytomyr	49.2	15.1	3.4	4.9	0.7	4.7

It is worth noting separately the situation of the enterprises of the Luhansk region. All of them are relocated and continue their activities in other regions of Ukraine, mostly in Kharkiv, Donetsk, Dnipropetrovsk, and Odesa regions. A significant number of workers were evacuated from the temporarily occupied territories of Luhansk region and continued to work at enterprises. In the total composition of employees in 2023, IDPs accounted for 46% of all employees.

2.2 In-demand occupations and skills

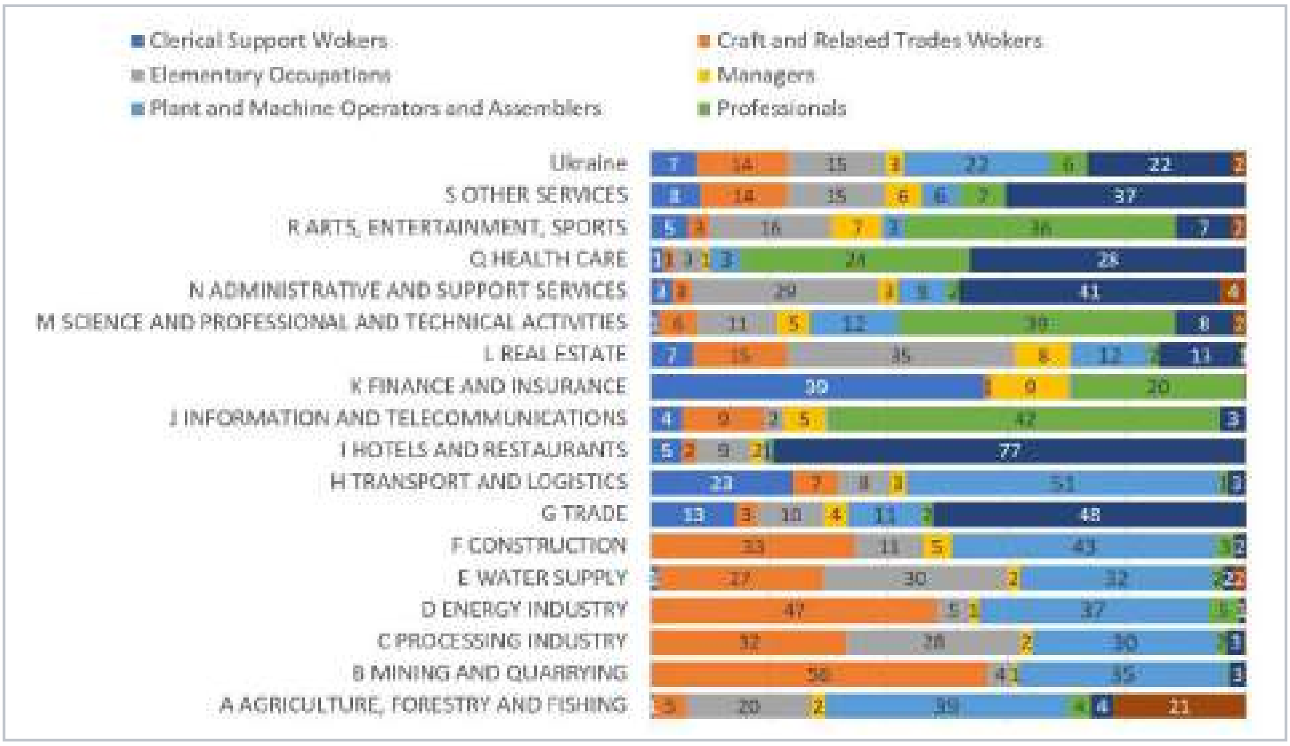
The Occupational composition of employees hired in 2023 clearly demonstrates the increased demand for workers in vocational professions in most sectors of the economy. The very low share of employees hired as managers is striking. Workers in the professionals' group accounted for a significant share of employment in the Information, Science, Health Care and Arts sectors.

Professional groups of skilled tool workers and machine and equipment maintenance workers, which during the growing years were most in demand on the labour market, were the majority in the industrial sectors, as well as in agriculture and transport.

The majority of trade and service professions are traditionally in demand in the trade and hotel and restaurant service sectors. There is also a relatively small number of the simplest professions in the total number of employed workers, and at the same time a significant number of them in certain sectors of the processing industry, water supply, real estate, and administrative services.

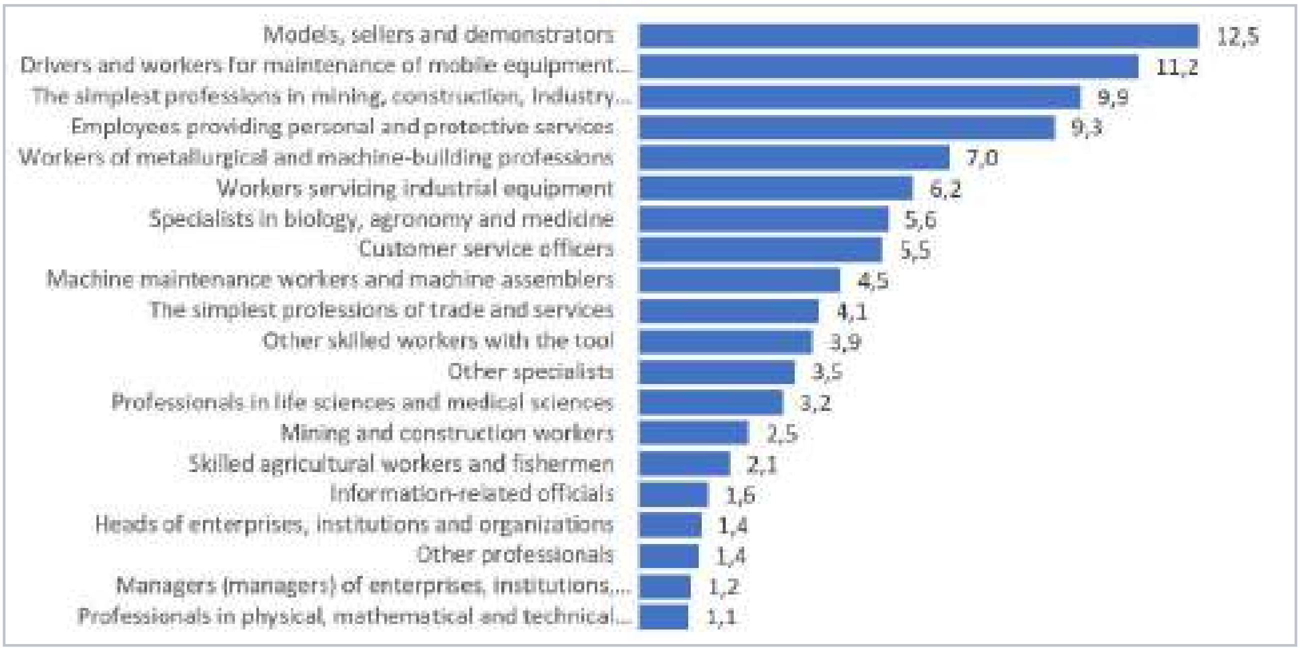
A visual distribution of employees hired during 2023 is presented in the following diagram.

FIG. 22. Occupational composition of female workers employed during 2023, by types of economic activity (by sections of the profession classifier), %



Taking into account the breakdown of employees, which were adopted during 2023, the groups of professions of Sellers, Drivers, as well as the Simplest professions are the most in demand. Their share in the total structure of hired employees is more than 30%. The distribution of employment in 2023 is shown in the following chart.

FIG. 23. Occupational composition of female employees hired during 2023, by types of economic activity (by subdivisions of the profession classifier), %



The same situation is observed for individual occupations, emphasizing the demand for vocational professions. The most sought-after professions will be blue-collar jobs of professional and technical direction.

TABLE 5. Occupations hired most often in 2023

No	Occupations hired most often in 2023	%
1	Sellers	12.0
2	Motor vehicle driver	9.1
3	Auxiliary worker	3.8
4	Accountant	3.5
5	Assistant nurse (medical brother)	3.3
6	Tractor driver/machine operator of agricultural (forestry) production	3.1
7	Security guard	2.8
8	Cook	1.9
9	Cleaner of service premises	1.4
10	Seamstress	1.1

Assessment of the demand for skills / competencies for the most in-demand occupations by employers demonstrated that universal qualities and skills of employees turned out to be the most sought after by employers. For all categories of employees, more than half of employers chose universal ones more often skills The most important thing for employees of all categories and sectors is the responsible attitude of the employee to work. This is explained by the widespread perception of employers that the lack of certain knowledge and skills can be compensated by a responsible attitude to work performance and a willingness to take over knowledge from more experienced employees. Probably, wartime and the conditions of the war led to the high demand for stress resistance and mastery of the Ukrainian language. To generalize, it can be stated that soft skills are generally more in demand than technical skills.

TABLE 6. Overall assessment of the demand for skills and competencies, points

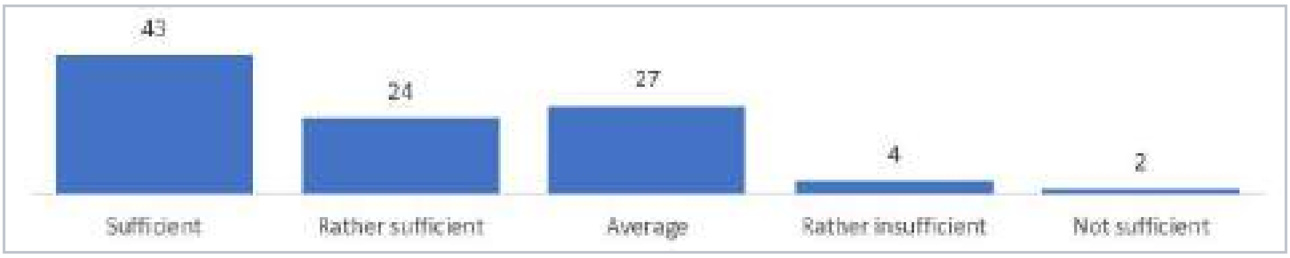
No	Overall assessment of the demand for skills and competencies, points	%
1	Responsibility	55.1
2	Attentiveness	48.0
3	Work with clients	18.7
4	Stress resistance	22.8
5	Teamwork	27.6
6	Communication skills	12.6
7	Tactfulness	14.1
8	Ability to learn	15.8
9	Work with the tool	17.3
10	Knowledge of the state language	13.3

At the same time, there are certain differences in the demand for occupations and skills in the main sectors of the economy. Annex 6.2.6. shows the top 10 most in-demand occupations and skills that employers identified as the most necessary for employees in the main sectors of the economy.

2.3 Demand for digital skills

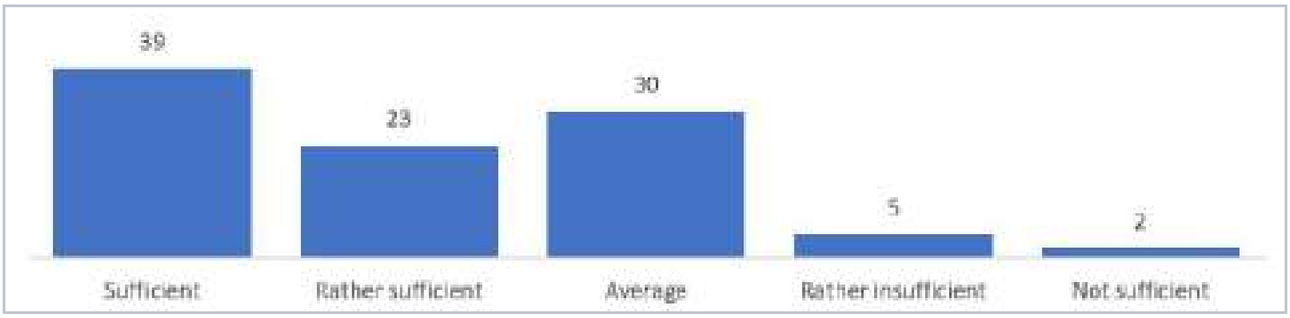
In general, employers rate the current level of digital skills among company employees quite highly. Only 6% of employers indicate that the company's employees do not have enough digital skills.

FIG. 24. Assessment of the level of possession of digital skills in employees of enterprises, %



Meanwhile, rather high assessments of the level of possession of digital skills are given by employers to persons who were candidates for positions in the company during 2023. Only 7% of employers noted that candidates did not have the required level of digital skills.

FIG. 25. Assessment of the level of possession of digital skills in candidates for positions in 2023, %



At the same time, in the general rating of in-demand skills, digital skills received a relatively low rating.

TABLE 7. Ranks of digital skills in the overall ranking of skills in demand

DIGITAL SKILLS		
	Skills and competencies	Rank
1	Computer skills	8
2	Working with databases	16
3	Work with CRM, ERP systems	24
4	Digital and network security	29

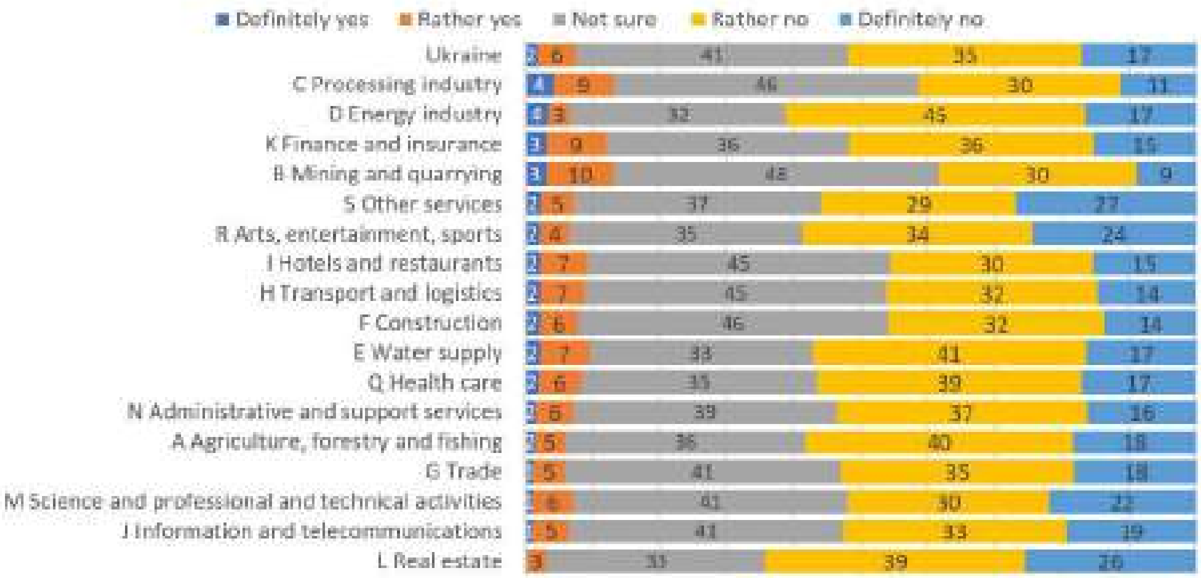
According to the above table of digital skills, only the skill of Working with a computer, which received the 8th position, acquired the highest-ranking skill. Database skills took 16th place in the rating, ERP and CRM work took 24th place, and digital and network security competence took 29th place.

Based on the given data, it can be concluded that the available supply of employees and the level of their digital competence generally corresponds to the general level of digitalisation of the level of their digital competence generally corresponds to the general level of digitalisation of the economy. At the same time, the growing importance of digital skills for companies may lead to their shortage in the labour market.

2.4 Expected hiring of employees

In general, it can be stated that the vast majority of employers do not have confidence in growth prospects. On average, only 8% of enterprises in Ukraine noted the possibility of additional recruitment during 2024, and only 2% of them indicated that they are confident in the implementation of these plans. More than half of the enterprises indicate that they do not plan to increase the number of employees in 2024. Of these, 17% of enterprises definitely claim that they do not plan to hire additional staff. The largest share of enterprises that are expected to expand their staff and hire additional employees is noted in the mining and processing industry and finance sectors. In the meantime, the share of enterprises indicating a planned reduction is less than 1%.

FIG. 26. Expectations regarding additional hiring of employees within 6 months of 2024, by types of economic activity %



According to the received data, large and medium enterprises are more optimistic in their assessments. In these segments, 15% and 12% of enterprises indicate the presence of staff expansion plans, respectively. However, there is also a segment among small and micro enterprises that has expansion plans. Among small enterprises, this segment constitutes 9%, and among micro-enterprises only 6%. It is probably worth noting that more than 40% of enterprises, regardless of their size, indicate the impossibility of providing an assessment of personnel change plans.

FIG. 27. Expectations regarding additional hiring of employees during 6 months of 2024, by the size of enterprises%

Nevertheless, according to the received data, employers indicated a prospective need for employees, which will amount to 1% of the total number of employees, which significantly exceeds the amount of planned reduction of employees.

The largest share of the planned additional hiring of employees (58%) falls on the Processing Industry (34%) and Trade (24%) sectors. At the same time, according to the provided estimates, these sectors do not offer the most attractive wages. On average, the highest salaries for additional hires in 2024 will be offered in the Finance, Mining, Healthcare, and Energy sectors.

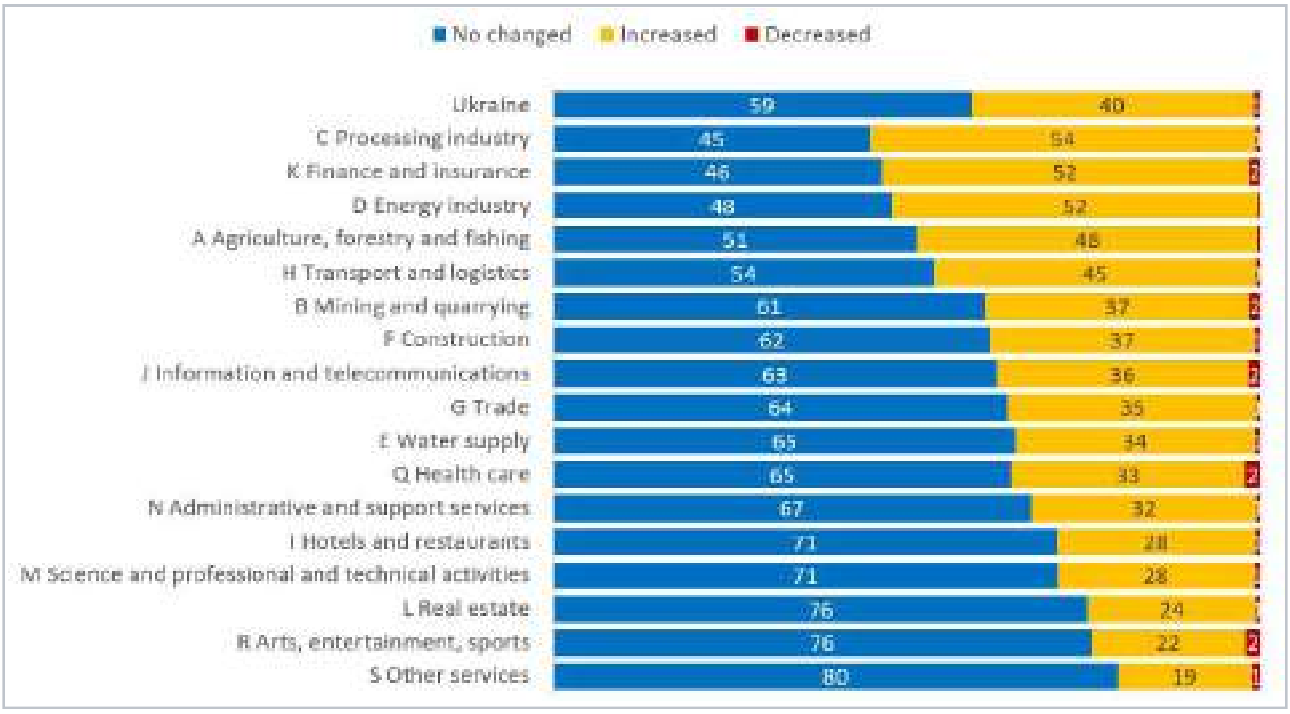
TABLE 8. Percentage of planned hiring in 2024 in total hiring and average salary offered by types of economic activity, %

No	SECTORS	%	Average salary offered (UAH)
1	C PROCESSING INDUSTRY	34	12413
2	G TRADE	24	9735
3	Q HEALTH CARE	6	14371
4	H TRANSPORT AND LOGISTICS	5	11167
5	A AGRICULTURE, FORESTRY AND FISHING	5	10527
6	F CONSTRUCTION	5	13338
7	N ADMINISTRATIVE AND SUPPORT SERVICES	4	10424
8	M SCIENCE AND PROFESSIONAL AND TECHNICAL ACTIVITIES	3	13748
9	B MINING AND QUARRYING	3	17054
10	K FINANCE AND INSURANCE	2	18498
11	I HOTELS AND RESTAURANTS	2	8511
12	D ENERGY INDUSTRY	2	14906
13	J INFORMATION AND TELECOMMUNICATIONS	2	12314
14	E WATER SUPPLY	1	10466
15	S OTHER SERVICES	1	8885
16	R ARTS, ENTERTAINMENT, SPORTS	0.4	8498
17	L REAL ESTATE	0.2	9212

2.5 Expected salary changes

Survey data show that the majority of enterprises did not revise the amount of wages during 2023. This is indicated by 59% of employers. At the same time, more than 40% of enterprises indicate that they have increased the wages of employees. The largest share of enterprises that increased salaries is noted in the Processing, Finance, and Energy sectors. At the same time, in all sectors there is a small number (up to 2%) of enterprises that indicated that in 2023 there was a reduction in the amount of wages. Given the above-mentioned inflation rate (up to 8%), this situation generally characterizes a decrease in the overall level of employees' income

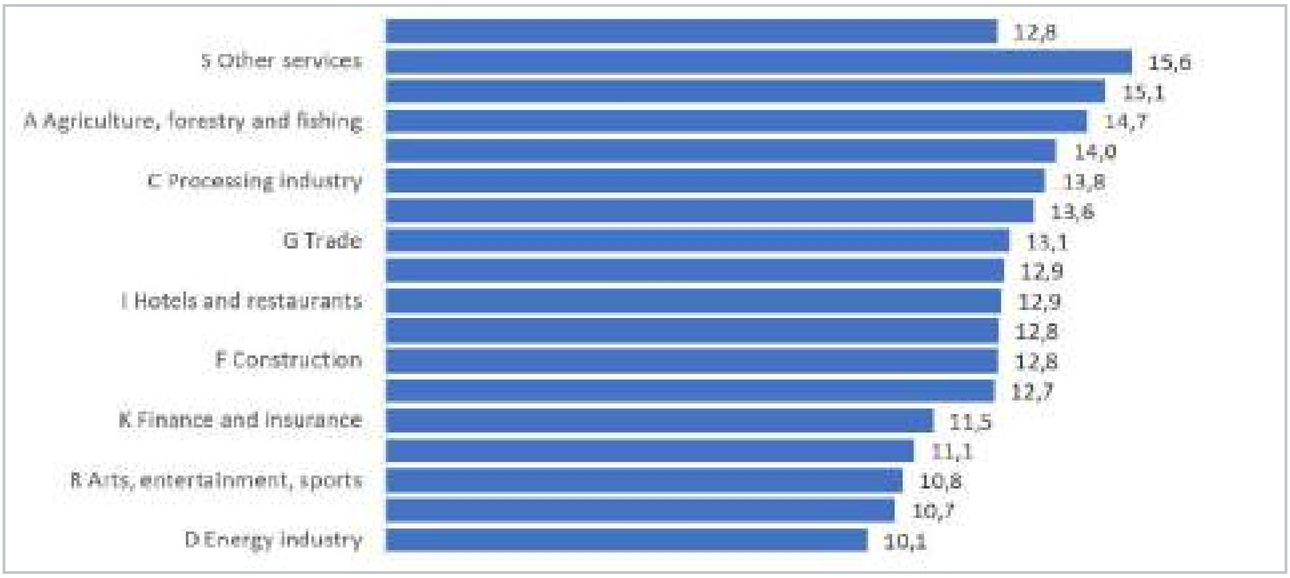
FIG. 28. Changes in salaries during 2023, by types of economic activity, %



More than 40% of enterprises indicate plans to increase salaries in 2024. The largest share of enterprises planning to raise wages is noted in the Processing, Finance, and Energy sectors. The smallest share of enterprises planning to increase wages is noted in the Services, Art and Real Estate sectors.

The total amount of declared wage increases during 2023 is 13% on average. Wages increased the most is in the Services, Mining and Agriculture sectors.

FIG. 29. The average increase in salaries earned during 2023, by type of economic activity, %



In general, the obtained data indicate that the majority of enterprises plans an additional increase in salaries. This is indicated by 59% of enterprises in Ukraine on average. However, the total volume of the declared planned wage increase is 12% on average. Most enterprises plan to increase in the sectors of Processing industry, Agriculture and Transport. This increase in wages is likely to be due to the increase in the minimum wage planned by the Government of Ukraine (by 6%), as well as partial compensation for inflationary losses in the previous year.

TABLE 9. Expectations of enterprises regarding wage increases in 2024, by types of economic activity, %

No	SECTORS	Enterprises planning salary increases, %	Average planned salary increase , %
	UKRAINE	58	12
1	C PROCESSING INDUSTRY	67	12
2	A AGRICULTURE, FORESTRY AND FISHING	62	12
3	H TRANSPORT AND LOGISTICS	60	12
4	E WATER SUPPLY	59	11
5	K FINANCE AND INSURANCE	59	11
6	D ENERGY INDUSTRY	59	10
7	G TRADE	57	12
8	R ARTS, ENTERTAINMENT, SPORTS	54	13
9	M SCIENCE AND PROFESSIONAL AND TECHNICAL ACTIVITIES	52	12
10	B MINING AND QUARRYING	52	11
11	N ADMINISTRATIVE AND SUPPORT SERVICES	52	13
12	Q HEALTH CARE	52	12
13	F CONSTRUCTION	51	12
14	J INFORMATION AND TELECOMMUNICATIONS	51	12
15	I HOTELS AND RESTAURANTS	50	12
16	L REAL ESTATE	47	12
17	S OTHER SERVICES	43	13

2.6 Difficulties in recruiting employees

As the survey revealed, on average, 36% of employers faced difficulties in recruiting employees across Ukraine. Most often, large enterprises encountered difficulties in selection, among which 58% indicated this. Among the sectors of the economy, the enterprises of the Mining and Processing industry, as well as the energy sector, had the most difficulties. Less than a third of enterprises indicated the presence of difficulties with the selection of employees in the Real Estate, Trade and Agriculture sectors.[36]

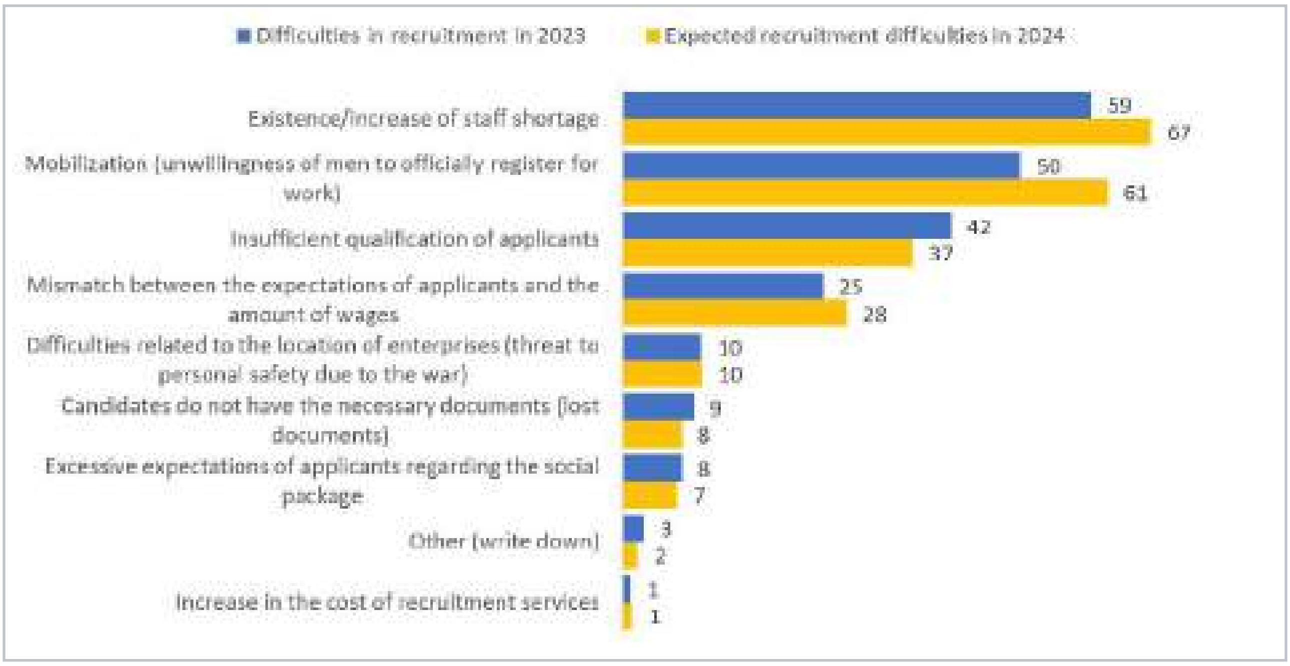
The situation is similar in content to assessments of possible difficulties in recruiting employees in 2024. At the same time, general assessments for Ukraine are more optimistic. So, overall, only 23% of employers indicate the expected difficulties in recruiting employees in 2024. It is also noted that a smaller share of employers expects difficulties in the segment of large enterprises (41%). At the same time, the sectors where employers mostly expect the same, these are, in particular, the mining and processing industry sectors, as well as the energy sector.[37]

Employers note the growing importance of the factors that cause difficulties in the selection of employees. In particular , it is noted that the most important factors causing the existing difficulties in recruitment are the increasing shortage of personnel in the labour market, as well as mobilisation, which limits the supply on the one hand due to the needs of the Armed Forces, and on the other hand, due to the reluctance of men to work officially in order to avoid mobilisation.

[36] Annex 6.2.7. Enterprises that had difficulty recruiting employees during 2023 by size and types of economic activity, %

[37] Annex 6.2.8. Expected difficulties in recruiting employees during 2024 by size and types of economic activity %

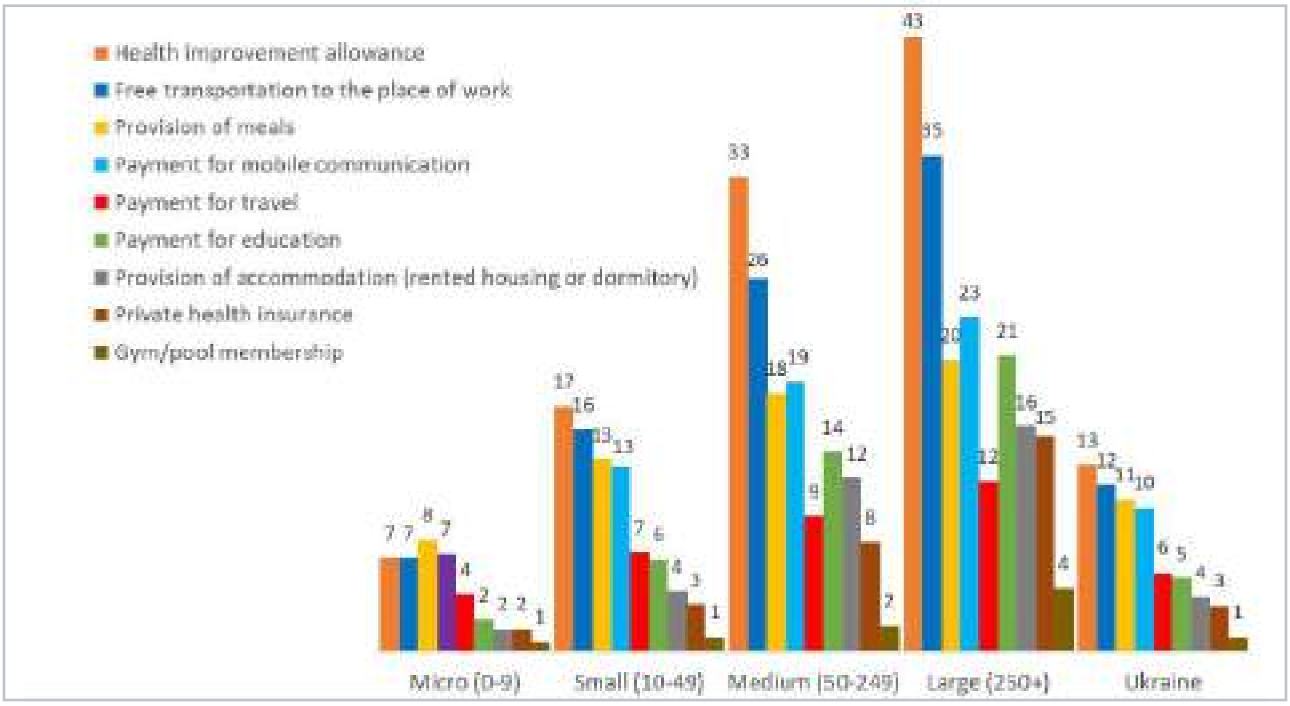
FIG. 30. The main factors of difficulties in recruiting employees in 2023 and 2024, %



A very important factor is the insufficient qualification of applicants for vacant positions, as well as inflated expectations of applicants regarding the size of the offered salary.

Programs of additional social support for employees (social package) are an important aspect of solving employee recruitment problems. The results of the survey showed that employers are trying to gradually improve the offered working conditions and open additional programs to increase the attractiveness of workplaces and increase staff loyalty

FIG. 31. Implementation of compensatory social programs for personnel, by size of enterprises, %



It can be noted that, in general, social packages for employees are not a common practice in Ukraine. The most common among the proposed social programs is wellness allowance. On average, 13% of employers in Ukraine offer such programs. The second, third and fourth places are occupied by the programs of free transportation to work, provision of food and payment of mobile communication. The rest of the programs are much less popular.

It should be noted that additional compensation programs are mainly provided by large and medium enterprises. In these segments, the level of use of compensation programs is significantly higher than the average for Ukraine. Thus, among large and medium enterprises, 43% and 33% of enterprises, respectively, use wellness allowance programs. It is noted that private medical insurance of employees among large enterprises is 16% and among medium enterprises - 12%, while the average for Ukraine is only 4%.

3 Employment of vulnerable groups

3.1 Vulnerable groups in the occupational structure

In general, it is noted that the share of representatives of vulnerable population groups in the overall occupational structure is quite small. Thus, according to the results of the survey, the total share of IDPs in the composition of employees is 4%. The share of persons with disabilities is 7%. There is an increase in the share of veterans in the occupational structure. According to the provided estimates, their share in the composition of employees is up to 2%.

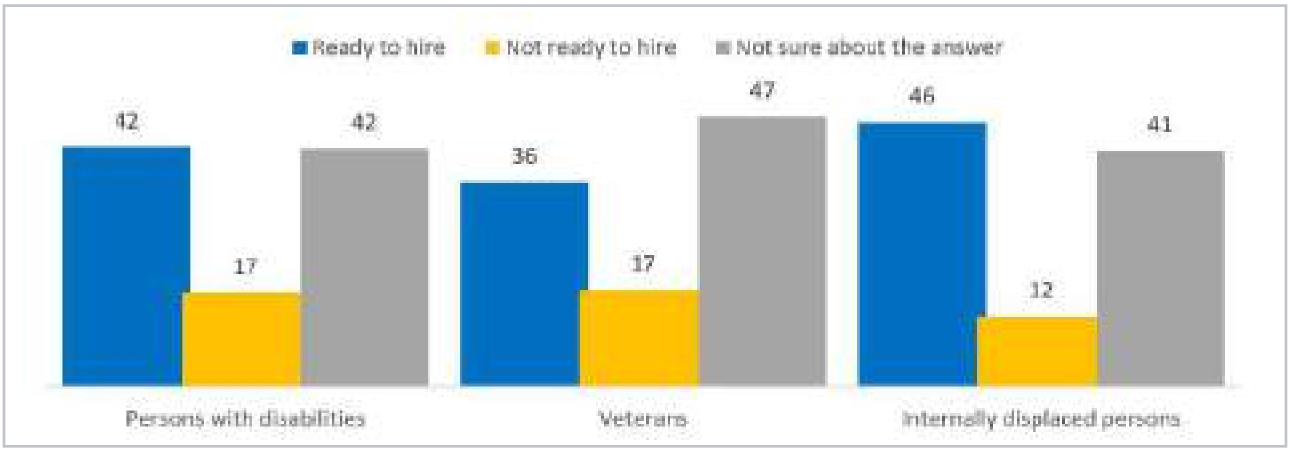
TABLE 10. The percentage of vulnerable groups on the labour market in the total number of employees, %

No	SECTORS	PERCENTAGE OF ENTERPRISES, %		
		Internally displaced persons ,	Persons with disabilities	Veterans
	UKRAINE	4	7	2
1	A AGRICULTURE, FORESTRY AND FISHING	1	6	2
2	B MINING AND QUARRYING	4	4	2
3	C PROCESSING INDUSTRY	3	6	2
4	D ENERGY INDUSTRY	6	9	3
5	E WATER SUPPLY	2	7	2
6	F CONSTRUCTION	3	6	3
7	G TRADE	7	5	1
8	H TRANSPORT AND LOGISTICS	3	6	3
9	I HOTELS AND RESTAURANTS	4	5	1
10	J INFORMATION AND TELECOMMUNICATIONS	3	4	1
11	K FINANCE AND INSURANCE	5	8	1
12	L REAL ESTATE	3	8	3
13	M SCIENCE AND PROFESSIONAL AND TECHNICAL ACTIVITIES	4	6	2
14	N ADMINISTRATIVE AND SUPPORT SERVICES	3	7	2
15	Q HEALTH CARE	3	10	1
16	R ARTS, ENTERTAINMENT, SPORTS	3	5	1
17	S OTHER SERVICES	1	7	4

3.2 Peculiarities of hiring employees of vulnerable groups

A significant number of employers indicate their willingness to hire workers from vulnerable groups. Thus, 46% of employers note their readiness to hire IDPs. A slightly smaller share of employers indicate their willingness to hire persons with disabilities (42%) and veterans (36%). It should be noted that more than 47% of employers could not decide on employment opportunities for persons from the listed groups, and 17% of employers indicate that they are not ready to hire such persons.

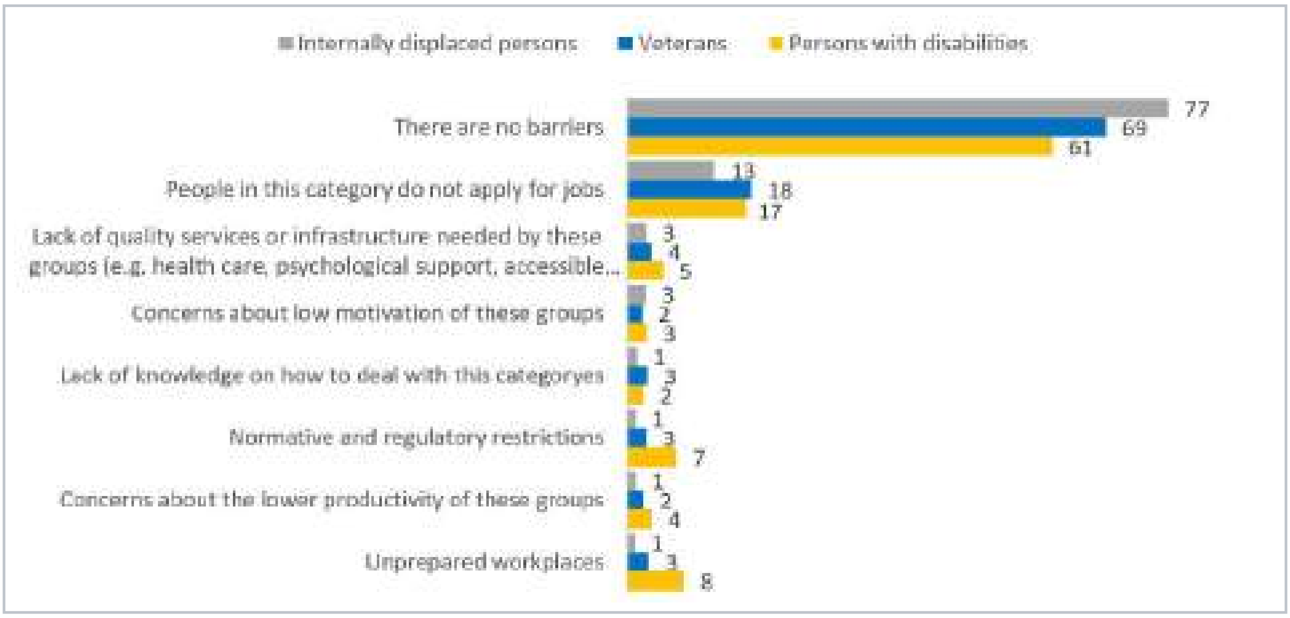
FIG. 32. Willingness of enterprises to hire persons from vulnerable groups on the labour market, %



3.3 Obstacles to the employment of vulnerable groups

According to the results of the survey, the majority of employers believe that there are no obstacles to the employment of persons from vulnerable groups. This especially applies to IDPs, as indicated by more than 77% of employers. According to employers, the main obstacle to the employment of persons from vulnerable groups is that they do not contact employers in search of work.

FIG. 33. Assessment of obstacles to employment of persons from vulnerable groups on the labour market, %

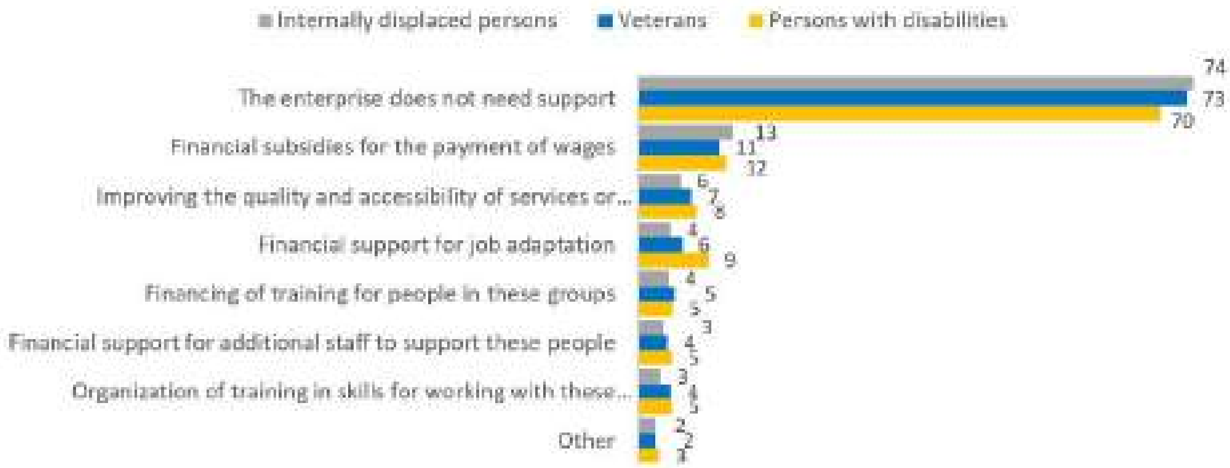


The rest of the possible obstacles are assessed by the majority of employers as insignificant. At the same time, 8% of employers note that unprepared workplaces are a possible obstacle to the employment of persons with disabilities, and 7% point to existing regulatory restrictions on the employment of persons with disabilities

3.4 Required support for the employment of vulnerable groups

The vast majority of enterprises indicate that they do not need support to ensure the employment of vulnerable groups. As can be seen from the chart below, employers are unanimous in their assessments of possible forms of support for the employment of IDPs, persons with disabilities and veterans.

FIG. 34. The needs of enterprises for external support to ensure the employment of persons from vulnerable groups at the labour market, %



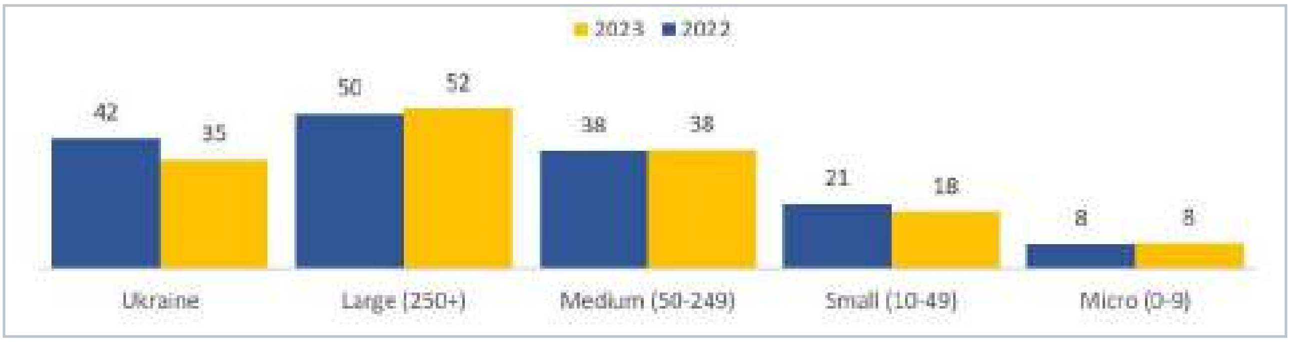
Up to 13% of employers indicate the need for financial assistance to enterprises when employing persons from vulnerable groups. Up to 9% of enterprises note the expediency of financial support for the adaptation of workplaces for these persons. Up to 8% of enterprises indicated the need to develop infrastructure and increase the availability of services for these groups.

4 Staff training needs

4.1 Training needs and scope of corporate training of employees

According to the data of the employer survey, in 2023, on average, 35.2% of companies in Ukraine provided staff training. Compared to the previous year, 2022, this share has slightly decreased due to a decline in employee training among small enterprises. Such data generally confirm the conclusion regarding the difficult situation of a significant number of enterprises and the corresponding reduction of expenditures on employee training[38] . At the same time, among large enterprises, the share of those providing personnel training increased moderately (by 2%).

FIG. 35. Enterprises that provided staff training during 2023, by enterprise size%



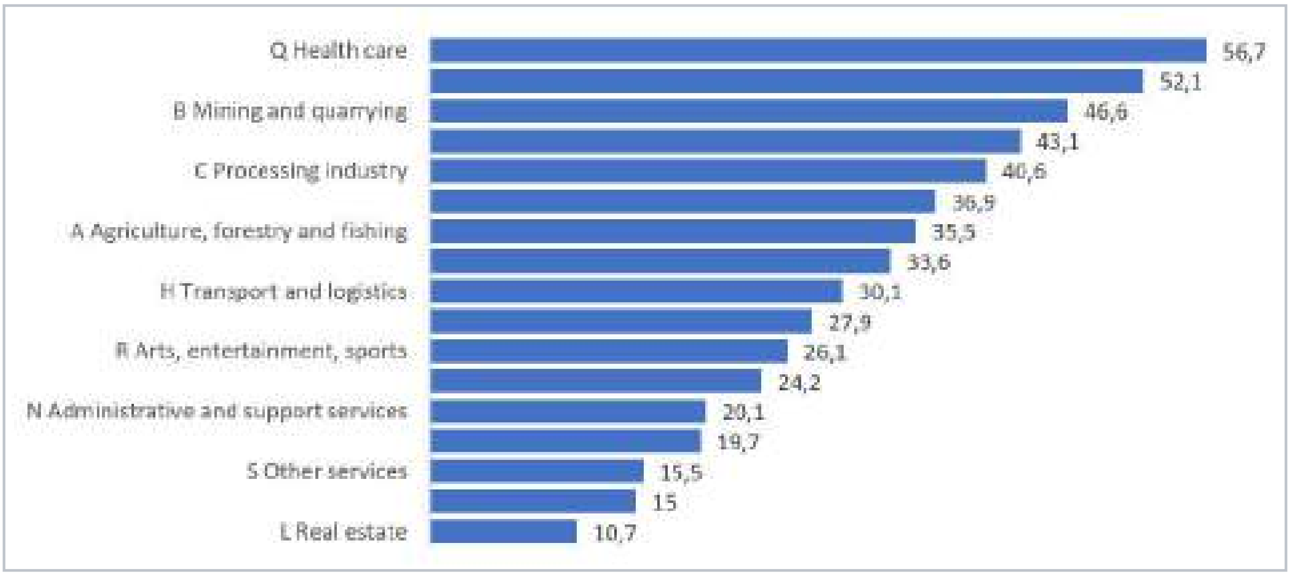
On average, 26% of employees received training at enterprises that provided training for employees, that is, in fact, every fourth employee. However, for most enterprises, the share of

[38] Labour market 2022-2023: state, trends and prospects // https://solidarityfund.org.ua/wp-content/uploads/2023/04/ebrd_ukraine-lm-1.pdf

employees who have undergone training does not exceed 10%. Also, it is possible to single out a segment of enterprises that are more actively training personnel. In particular, there are 17% of companies that indicate that training was conducted for more than half of the employees, of which 5% indicate that all employees received training. In general, it can be stated that the training of employees is more actively introduced by large enterprises.

According to the results of the survey, enterprises in 2023 most actively provided personnel training in the sectors of Health Care, Energy, Mining, Finance, and Processing industries. Please note that the share of large enterprises in these sectors is the largest.

FIG. 36. Enterprises that provided personnel training during 2023, by types of economic activity, %



Real estate, hotel and restaurant business, and the service sector have a relatively smaller share of enterprises that provided staff training.

4.2 Main forms of corporate training

The most common forms of providing personnel training are workplace training (46.5%), training for new employees (22.9). The significant importance (12%) of qualification confirmation in qualification centres, the opening of which began last year, is noted.

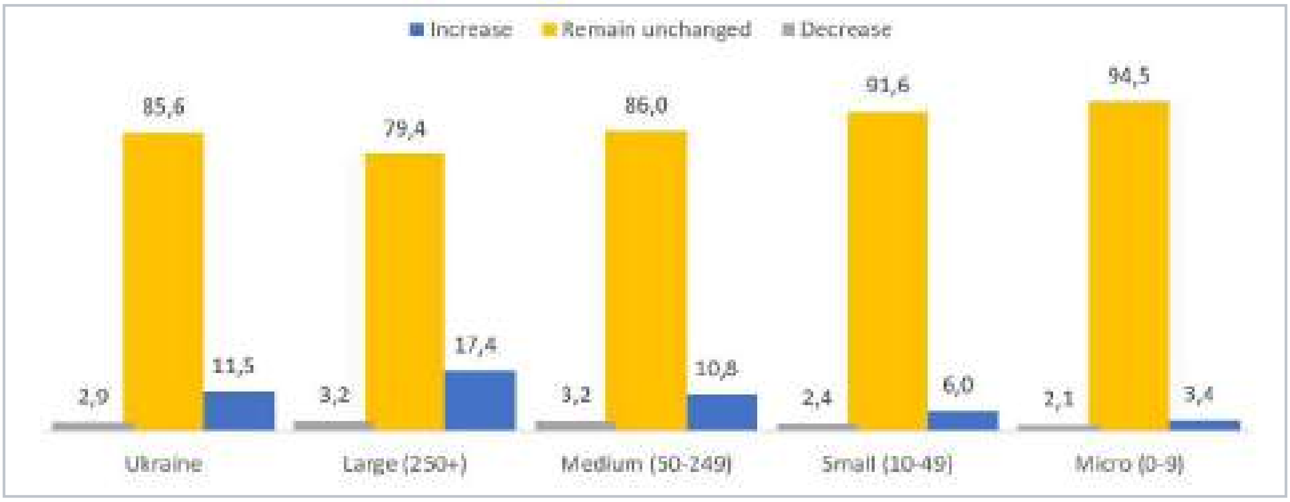
FIG. 37. Main forms of training used by enterprises in 2023, %

9% of enterprises use internal permanent training programs for training, as well as short-term specialized trainings from external providers.
7.8% and 6.5% of enterprises indicate that they use the services of institutions of higher and vocational education, respectively. It is worth noting that 6.3% of enterprises mentioned the use of educational online platforms for training employees. A fairly significant number of enterprises (4.8%) indicate that they have their own certified training centres.

4.3 Future needs for personnel training

According to the results of the survey, the vast majority of employers (85.6%) indicate that the volume of employee training during the next year will remain unchanged. At the same time, 11.5% of enterprises indicate that they plan to increase the amount of employee training and only 2.9% of enterprises plan to reduce the amount of employee training.

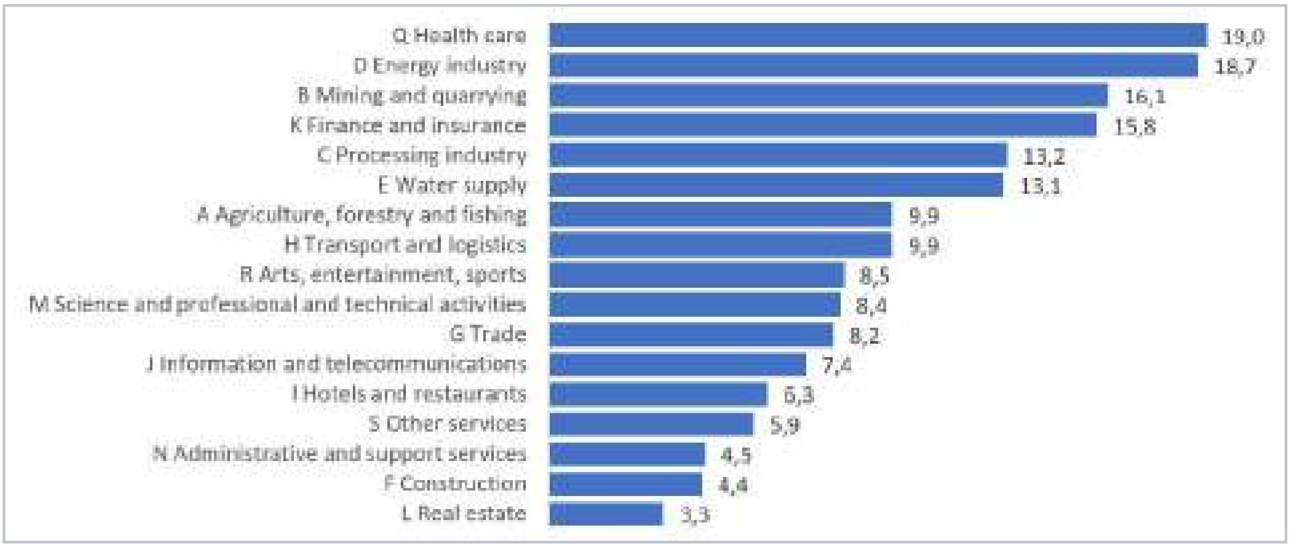
FIG. 38. Assessment of training needs in 2024, compared to the previous one, %
It is noted that the growth of training volumes is expected to a greater extent among large and



medium enterprises. Thus, among large enterprises, 17.4% of large and 10.8% of medium enterprises mention plans to increase training volumes.

The largest share of enterprises planning to increase the amount of training of employees is noted in the sectors of health care, energy, mining industry, finance and processing industry. Please note that the share of large enterprises in these sectors is the largest.

FIG. 39. Enterprises that plan to increase the amount of training during 2024, by types of economic activity%

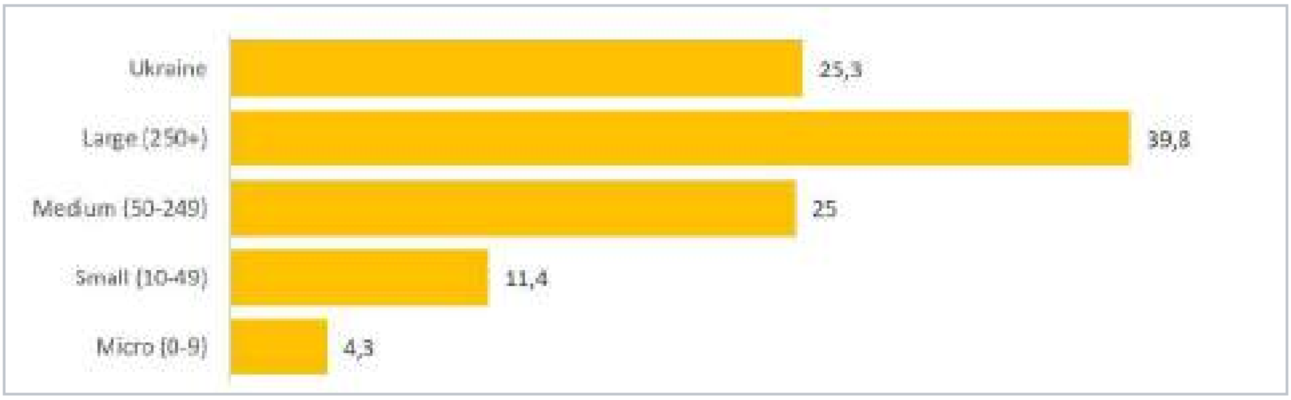


It is important to note that the share of enterprises that plan to expand the scope of employee training is available at enterprises in all sectors of the economy, even in those whose scope of training was the smallest compared to other sectors.

4.4 Cooperation with institutions of vocational and technical education

In general, it is noted that more than 25% of enterprises cooperate in one way or another with institutions of vocational and technical education. Compared to the previous study[39], this indicator decreased by more than 10 %. This decrease can be explained by the specifics of vocational schools in wartime. In particular, a large number of schools in many regions have switched to a distance learning format, and some businesses have refused to provide practical training due to the inability to guarantee safety for students under the threat of missile attacks. Large enterprises traditionally cooperate more actively with VTE institutions.

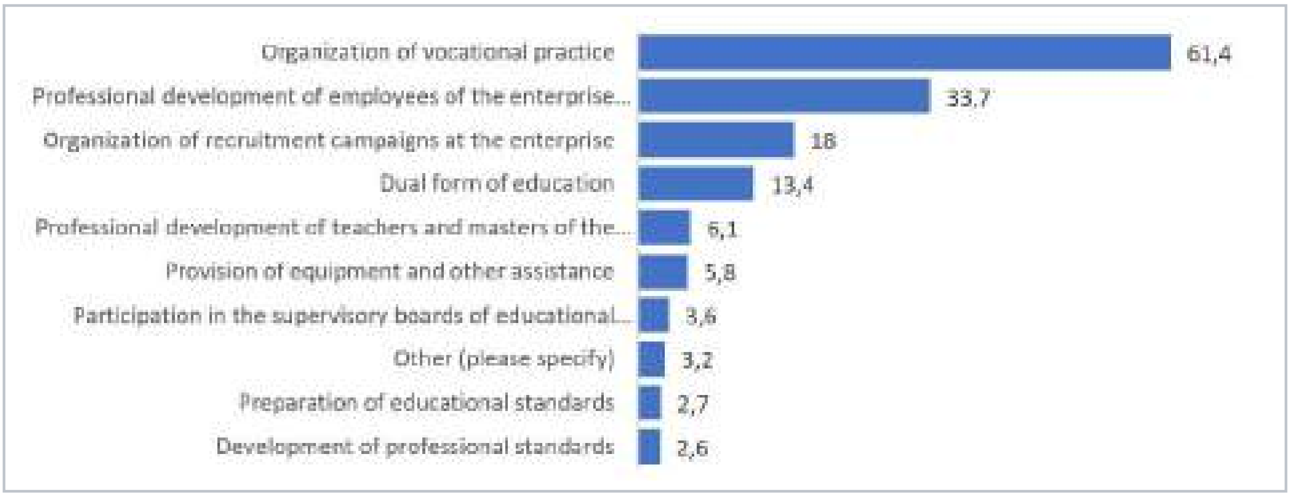
FIG. 40. Enterprises cooperating with VTE institutions, by enterprise size, %



For those who cooperate with VTE schools, the most common form of enterprise cooperation with VTE institutions is the organization of practical training (61%), professional training of employees (33%) and organization of campaigns for recruitment of employees (18%).

[39] Labour market 2022-2023: state, trends and prospects // https://solidarityfund.org.ua/wp-content/uploads/2023/04/ebrd_ukraine-lm-1.pdf

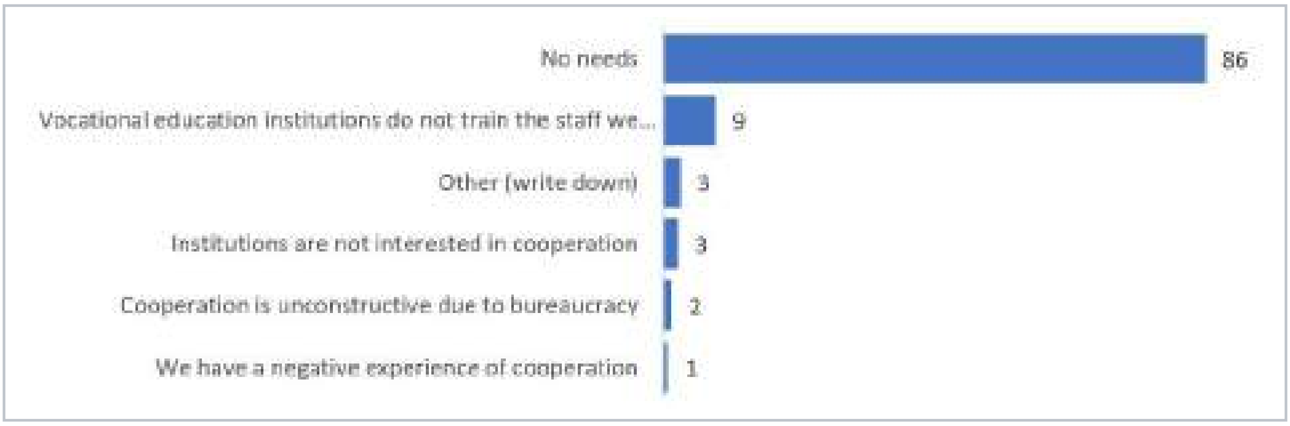
FIG. 41. The main forms of cooperation between enterprises and VTE institutions,%



It is noted that 13% of enterprises cooperating with VTE institutions participate in dual education programs. It is worth noting that compared to the past experience, this indicator increased by 3%. The largest share of enterprises cooperating with VTE institutions is noted in Khmelnytskyi, Sumy, Zakarpattia, Volyn, Ivano-Frankivsk, Rivne, and Chernivtsi regions. The smallest is among the enterprises of Luhansk region, Kyiv region, Kyiv city, Kherson, Kharkiv and Odesa regions[40].

The main reasons for the lack of cooperation with VTE institutions are the absence of such a need, as well as the fact that VTE institutions do not train workers in occupations that are relevant for these enterprises.

FIG. 42. Assessment of reasons for lack of cooperation with VET institutions, %



We also note a small share of enterprises, which indicates lack of interest in cooperation on the part of VTE institutions (3%), non-constructive cooperation due to its over-bureaucratization (1%), as well as negative experience of cooperation (1%).

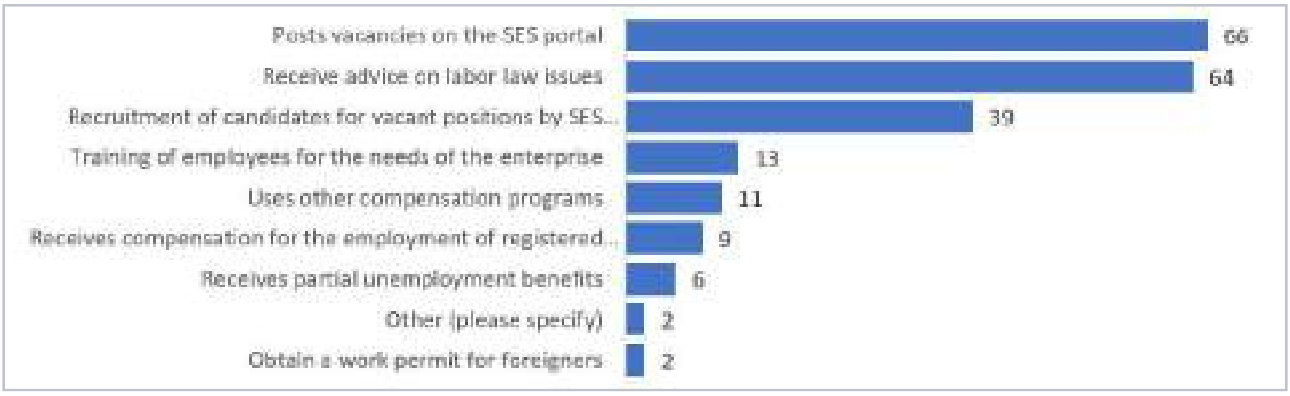
[40] Annex 6.2.10. Enterprises cooperating with VTE institutions, by regions, %

5 Services of the State Employment Service

Since the survey was carried out by employees of employment centres who invited employers to fill out a questionnaire or conducted a survey in the form of a telephone interview, the evaluation of employers' cooperation with the employment service obtained as a result of the survey should be taken very critically due to the possible distortion of answers. It is possible that respondents answered more positively than they actually did because of a desire to give socially desirable answers or to avoid conflict. This aspect should be considered when analysing and interpreting the data presented in this section.

According to the received data, the vast majority of employers (85%) cooperate with the state employment service. As the most common forms of cooperation, employers indicate posting of vacancies on the SES portal (66%), receiving advice on employment legislation (64%), recruiting employees for company vacancies (39%).

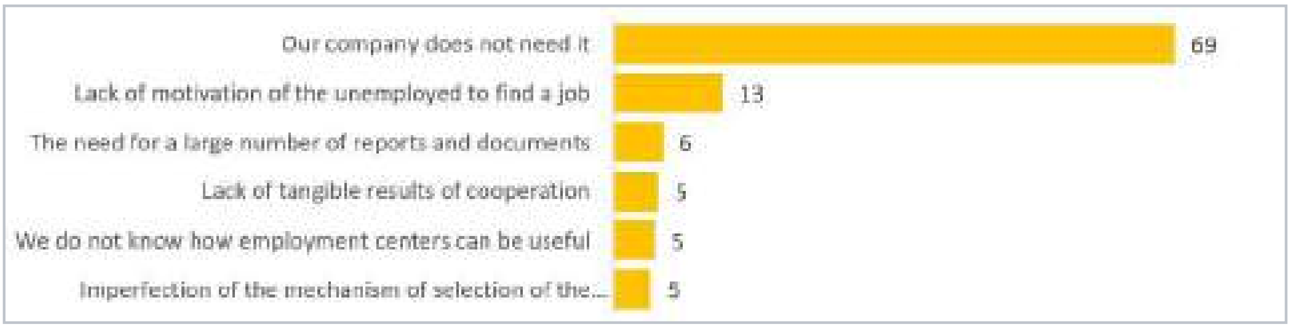
FIG. 43. Main forms of cooperation with SES, %



It is worth noting that 11% of employers use compensatory programs of the state employment service, which were introduced after the beginning of the military invasion of the Russian Federation to support business. Thus, 38% of employers indicate that they are interested in receiving compensation programs for social security, and another 15% would like to receive clarification on the possibilities of receiving them. More than half of the employers (54%) expressed their willingness to cooperate with the SES regarding the organization of professional training of employees.

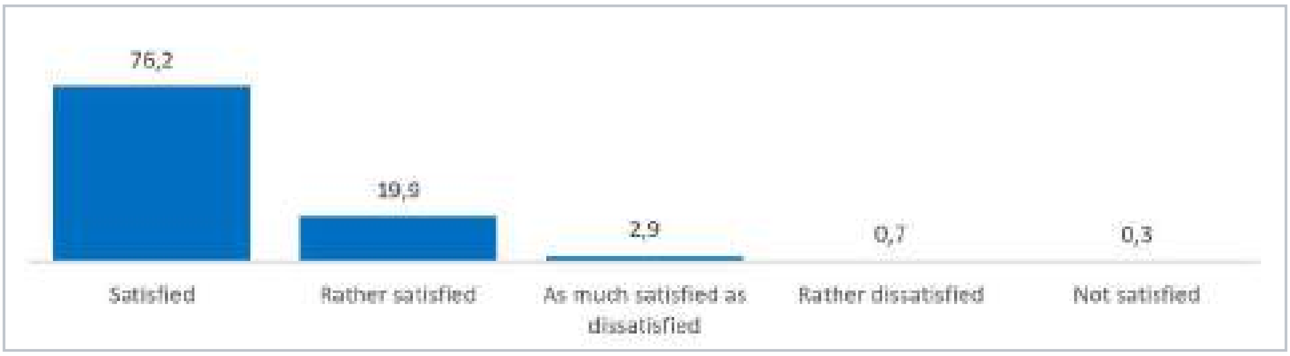
In most cases, employers do not cooperate with SES due to lack of such need (69%). Some employers (13%) indicate that they do not cooperate with the Social Security Administration due to insufficient motivation of the unemployed to get a job.

FIG. 44. The main reasons for the lack of cooperation with the SES, %



According to the received data, the vast majority of employers are fully or partially satisfied with the services of the State Employment Service. The share of neutral or negative responses is less than 4%

FIG. 45. Assessment of satisfaction with SES services, %



Among the main advantages of SES employers indicate:

- note the speed of response to requests in most directions
- the professionalism of employees and the quality of service provision
- the possibility of receiving financial support from the SES
- organization of internship, informativeness of events
- Constructive and polite communication

Employers consider the following to be possible directions for improving interaction:

- Expansion of digital services and stability of Internet resources operation
- Expansion of employer support programs
- Simplication of access to support programs
- General improvement of labour legislation

6 Annexes

6.1 Research methodology

The study was conducted using a combination of methods and various data sources. The main work on organising data collection was carried out with the direct involvement of the State Employment Service and the full assistance of the Federation of Employers of Ukraine. The study included the generalisation of information by the following components.

1) Analysis of available statistical indicators of the country's economic and demographic development, which can characterise the general situation and conditions that directly influenced key changes in the labour market. This component involved analysing indicators of the general economic situation (GDP, inflation, production volumes, incomes), structural statistics of enterprises, the Occupational composition of the labour force (including the unemployed), the gender and age structure of employment, demographic and migration dynamics, job vacancies by profession, etc.

2) A survey of employers on the specifics of hiring, current and future needs for employees and skills, as well as existing features of employer training and employment of vulnerable groups. In particular, the survey provided insights into

- prospects for increasing or decreasing the number of employees by profession;
- existing and prospective vacancies (by profession);
- the most in-demand occupations and skills;
- existing problems in recruiting employees by profession;
- peculiarities of employment of persons from vulnerable categories;
- existing obstacles and necessary measures to support the employment of persons from vulnerable categories.

The survey involved **33056** companies.

The general population for the survey was defined as the set of economically active enterprises of Ukraine that paid taxes without arrears in the 3rd quarter of 2023 and had employees. The general population and the survey sample did not include enterprises of certain types of economic activity that are directly or indirectly related to the defence sector of Ukraine. In particular, public administration and defense, compulsory social insurance, and certain sections of processing industry. The study also did not include the education sector.

6.1.1. Peculiarities of sample design

In order to obtain representative data at the district level, separate random stratified samples were drawn for each district of the country. The exception was Donetsk and Luhansk oblasts, where all available enterprises were surveyed.

All large enterprises were defined as self-representative and all of them were included in the sample without exception. All other firms were stratified by size and NACE code as follows:

SECTION KVED	CODE	SIZE	STRATUM CODE
A	1	Small and micro	1
A	1	Medium	2
BCDE	2	Small and micro	3
BCDE	2	Medium	4
F	3	Small and micro	5
F	3	Medium	6
G	4	Small and micro	7
G	4	Medium	8
H	5	Small and micro	9
H	5	Medium	10
IR	6	Small and micro	11
IR	6	Medium	12
JM	7	Small and micro	13
JM	7	Medium	14
KL	8	Small and micro	15
KL	8	Medium	16
NS	9	Small and micro	17
NS	9	Medium	18
Q	10	Small and micro	19
Q	10	Medium	20
		Large	21

Thus, the sample was selected for small, micro and medium enterprises in each district. The total sample size for each district was calculated based on the total number of enterprises (as a general population), a margin of error of 5% and a confidence level of 95%. A small margin of 3% of the sample size was made for unforeseen situations.

Next, the enterprises were distributed among the strata in proportion to the number of enterprises in each stratum. Subsequently, enterprises were randomly selected for the study using the PPS (proportional per size) algorithm. Thus, the probability of being included in the sample was proportional to the number of people employed at the enterprise.

An important criterion for assessing the quality of the sample was the ratio of not only the number of enterprises in each stratum, but also the ratio of the number of employees in each stratum (including the stratum of large enterprises). It was this criterion that was used to pre-evaluate the samples, and after data collection, compensatory weighting was performed based on this criterion. Weights were built for analysing data for Ukraine as a whole, analysing each oblast separately, and analysing each individual district.

Given the broad capabilities of the State Employment Service to engage employers in the survey, enterprises from all regions of Ukraine (except for the Autonomous Republic of Crimea) participated in the survey. The data for Luhansk region[41] represents enterprises that were relocated to other regions of Ukraine, mainly Donetsk, Kharkiv, and Dnipro regions. A significant share of relocated enterprises is present in the sample of Donetsk region. The samples of Donetsk and Luhansk oblasts are representative at the oblast level, but not representative at the district level.

The samples of Zaporizhzhia and Kherson regions represent only the districts controlled by Ukraine. This includes Zaporizhzhia district of Zaporizhzhia region and Kherson and Beryslav districts of Kherson region.

The survey was conducted from 01 November to 01 December 2023 by employees of the recruitment departments of the district branches of the regional employment centers, who invited employers to the survey by sending them links to online questionnaires for self-completion and/or conducting a telephone survey. The main respondents for large and medium enterprises were managers or specialists of HR departments. For small and micro enterprises, the main respondents were managers or accountants.
The sampling error for the territory of Ukraine where the survey was conducted is 0.52%. Regional sampling errors range from 1.85% to 4.84%.

TAB.11. General and sample population sizes and marginal error by region

№	Region	Sample base (General population)	Sample size	% marginal error (P=95%)
	Ukraine	381792	33056	0.52
1	Kyiv city	63134	1115	2.91
2	Vinnytsia	14339	1786	2.17
3	Volyn	9534	1394	2.43
4	Dnipropetrovsk	35268	2671	1.82
5	Zhytomyr	11675	1250	2.62
6	Zakarpattia	9165	1475	2.34
7	Zaporizhzhia	10736	424	4.66
8	Ivano-Frankivsk	12145	1688	2.21
9	Kyiv region	24410	1919	2.15
10	Kirovohrad	8725	1061	2.82

[41] The territory of Luhansk region has been temporarily occupied by Russia for 99% since spring 2022.

11	Lviv	28660	2546	1.85
12	Mykolaiv	10302	1129	2.75
13	Odesa	24643	2394	1.90
14	Poltava	14580	1265	2.63
15	Rivne	10222	1316	2.52
16	Sumy	9271	1206	2.63
17	Ternopil	8754	1011	2.90
18	Kharkiv	31258	2130	2.05
19	Kherson	5937	384	4.84
20	Khmelnytskyi	11473	1106	2.80
21	Cherkasy	11964	1195	2.69
22	Chernivtsi	6700	637	3.69
23	Chernihiv	8897	1514	2.29
24	Donetsk	---	280	---
25	Luhansk	---	160	---

Errors in district samples range from 2.9% to 9.5%.

TAB. 12. General and sample population sizes and marginal error by district

#	Region	District	Sample base (General population)	Sample size	% marginal error (P=95%)
1	Kyiv city	Without division into districts	63134	1115	2.91
2	Vinnytsia	Vinnytsia	8748	430	4.61
2	Vinnytsia	Haisyn	1486	316	4.89
2	Vinnytsia	Zhmerynka	966	262	5.17
2	Vinnytsia	Mohyliv-Podilskyi	907	262	5.11
2	Vinnytsia	Tulchyn	926	242	5.41
2	Vinnytsia	Khmilnyk	1306	274	5.26
3	Volyn	Volodymyr-Volynskyi	1264	322	4.71
3	Volyn	Kamin-Kashyrskyi	643	266	4.60
3	Volyn	Kovel	1836	356	4.66
3	Volyn	Lutsk	5791	450	4.44
4	Dnipropetrovsk	Dnipro	19710	528	4.21
4	Dnipropetrovsk	Kamianske	2921	404	4.53
4	Dnipropetrovsk	Kryvyi Rih	6578	434	4.55
4	Dnipropetrovsk	Nikopol	1879	350	4.73
4	Dnipropetrovsk	Novomoskovsk	1448	322	4.82
4	Dnipropetrovsk	Pavlohrad	1434	325	4.78
4	Dnipropetrovsk	Synelnykove	1298	308	4.88
5	Zhytomyr	Berdychiv	1319	245	5.65
5	Zhytomyr	Zhytomyr	7458	391	4.82
5	Zhytomyr	Zviahel	1146	295	4.92
5	Zhytomyr	Korosten	1752	319	4.96
6	Zakarpattia	Berehove	1001	249	5.38
6	Zakarpattia	Mukachevo	2136	323	5.02

#	Region	District	Sample base (General population)	Sample size	% marginal error (P=95%)
6	Zakarpattia	Mukachevo	2136	323	5.02
6	Zakarpattia	Rakhiv	476	153	6.53
6	Zakarpattia	Tiachiv	857	226	5.59
6	Zakarpattia	Uzhhorod	3283	264	5.78
6	Zakarpattia	Khust	1412	260	5.49
7	Zaporizhzhia	Zaporizhzhia	10736	424	4.66
8	Ivano-Frankivsk	Verkhovyna	158	115	4.77
8	Ivano-Frankivsk	Ivano-Frankivsk	6539	423	4.61
8	Ivano-Frankivsk	Kalush	2217	350	4.81
8	Ivano-Frankivsk	Kolomyia	2041	332	4.92
8	Ivano-Frankivsk	Kosiv	433	207	4.92
8	Ivano-Frankivsk	Nadvirna	757	261	4.91
9	Kyiv region	Bila Tserkva	4733	303	5.45
9	Kyiv region	Boryspil	2579	254	5.84
9	Kyiv region	Brovary	3649	335	5.10
9	Kyiv region	Bucha	7479	417	4.66
9	Kyiv region	Vyshhorod	1842	100	9.53
9	Kyiv region	Obukhiv	3326	350	4.96
9	Kyiv region	Fastiv	802	160	6.93
10	Kirovohrad	Holovanivsk	747	231	5.36
10	Kirovohrad	Kropyvnytskyi	5144	298	5.51
10	Kirovohrad	Novoukrainka	836	237	5.39
10	Kirovohrad	Oleksandriyka	1998	295	5.27
11	Lviv	Drohobych*	1925	354	4.71
11	Lviv	Zolochiv	1206	326	4.64
11	Lviv	Lviv	19259	553	4.11
11	Lviv	Sambir	1062	295	4.85
11	Lviv	Stryi	2321	365	4.71
11	Lviv	Chervonohrad	1500	339	4.68
11	Lviv	Yavoriv	1387	314	4.86
12	Mykolaiv	Bashtanka	844	274	4.87
12	Mykolaiv	Voznesensk	1150	316	4.69
12	Mykolaiv	Mykolaiv	7301	243	6.18
12	Mykolaiv	Pervomaisk	1007	296	4.79
13	Odesa	Berezivka	574	250	4.66
13	Odesa	Bilhorod-Dnistrovskyi	1465	340	4.66
13	Odesa	Bolhrad	807	300	4.48
13	Odesa	Izmail	1339	320	4.78
13	Odesa	Odesa	18751	670	3.72
13	Odesa	Podilsk	1202	308	4.82
13	Odesa	Rozdilna	505	206	5.25
14	Poltava	Kremenchuk	4407	274	5.73
14	Poltava	Lubny	1618	299	5.12

#	Region	District	Sample base (General population)	Sample size	% marginal error (P=95%)
14	Poltava	Myrhorod	1436	306	4.97
14	Poltava	Poltava	7119	386	4.85
15	Rivne	Varash	577	244	4.77
15	Rivne	Dubbo	1071	298	4.82
15	Rivne	Rivne	7418	470	4.37
15	Rivne	Sarny	1156	304	4.83
16	Sumy	Konotop	1221	234	5.76
16	Sumy	Okhtyrka	803	205	5.91
16	Sumy	Romny	725	227	5.39
16	Sumy	Sumy	5264	306	5.44
16	Sumy	Shostka	1258	234	5.78
17	Ternopil	Kremenets	667	241	5.04
17	Ternopil	Ternopil	6570	443	4.50
17	Ternopil	Chortkiv	1517	327	4.80
18	Kharkiv	Bohodukhiv	883	282	4.81
18	Kharkiv	Izium	1052	301	4.77
18	Kharkiv	Krasnohrad	555	241	4.75
18	Kharkiv	Lozova	964	300	4.70
18	Kharkiv	Kharkiv	25612	673	3.73
18	Kharkiv	Chuhuiv	1408	333	4.69
19	Kherson	Beryslav	533	148	6.85
19	Kherson	Kherson	5404	236	6.24
20	Khmelnytskyi	Kamianets-Podilskyi	2134	348	4.81
20	Khmelnytskyi	Khmelnytskyi	7471	442	4.52
20	Khmelnytskyi	Shepetivka	1868	316	5.03
21	Cherkasy	Zvenyhorodka	1197	265	5.31
21	Cherkasy	Zolotonosha	970	260	5.20
21	Cherkasy	Uman	2055	324	5.00
21	Cherkasy	Cherkasy	7742	346	5.15
22	Chernivtsi	Vyzhnytsia	428	137	6.90
22	Chernivtsi	Dnistrovskyi	667	228	5.27
22	Chernivtsi	Chernivtsi	5605	272	5.80
23	Chernihiv	Koriukivka	557	244	4.70
23	Chernihiv	Nizhyn	1476	327	4.78
23	Chernihiv	Novhorod-Siverskyi	402	204	4.82
23	Chernihiv	Pryluky	1198	323	4.66
23	Chernihiv	Chernihiv	5264	416	4.61

6.1.2. Survey questionnaire

Dear employer!

The purpose of this survey is to determine the current state and future needs of workers and in-demand skills. Your participation in the survey is very important, because the information provided will help determine the actual needs of enterprises and prepare the personnel necessary for the recovery and development of the economy of Ukraine. The results of the survey will not be transferred to any third-party institutions and will be used to determine the current state and prospects of economic recovery, to justify the scope and improvement of youth and adult training programs.

Thank you in advance for your cooperation.

Q1. Please indicate the code of the main activity of your company according to the NACE.

____

Q2. Please indicate the name of the main activity of your company according to the NACE.

____

Q3_ a. Enter the average number of staff as of January 1, 2023

____

Q3_ b. Enter the average number of staff as of January 1, 2022
if you do not have accurate information, if possible, consult with colleagues or provide an approximate number

____

Q3_ c. Indicate the average number of staff as of the time of the survey
if you do not have accurate information, if possible, consult with colleagues or provide an approximate number

____

Q3_d . Specify the number or percentage of the listed categories of employees who currently work at the enterprise.

Category of employees	Number	Percentage
Directors/managers		
Professionals and Specialists		
Officers and administrative workers		
Skilled workers		
Unqualified workers		
Women		
Youth under the age of 25		
Internally displaced persons		
Persons with disabilities		
Veterans of the JFO and the war with the Russian Federation		

If you do not have accurate information, if possible, consult with colleagues or provide an approximate number

Q4_a. How did the volume of production/sales/work performed or services provided by your company change during 2023?

1	They have increased significantly
2	Moderately increased
3	Didn't change
4	Moderately decreased
5	Significantly decreased

Q4_b. What do you think will be the volume of production/sales/work performed or services provided by your company in 2024?

1	They will increase significantly
2	They will increase moderately
3	Will not change
4	Will decrease moderately
5	Will decrease significantly

Q5_a. Did your company hire full-time employees during 2023?

1	Yes
2	No

Q5_ a1. Specify the number or percentage of the listed categories of employees who were accepted at the enterprise during 2023ю
If you do not have accurate information, if possible, consult with colleagues or provide an approximate number.

Category of employees	Number	Percentage
Women		
Youth under the age of 25		
Internally displaced persons		
Persons with disabilities		
Veterans of the JFO and the war with the Russian Federation		
VTE graduates		

Q5_b (1-5). Employees of which professions were hired to the staff during 2023?

The name of the profession	Specify the number of employees in this profession (if you do not know exactly, specify the number that was last recruited for a similar position)
Profession_1	
Profession_2	
Profession_3	
Profession_4	
Profession_5	

Q5_c-1. Name the key skills that a candidate should possess for the profession _ 1
Q5_c-2. Name the key skills that a candidate should possess for the profession _ 2
Q5_c-3. Name the key skills that a candidate should possess for the profession _ 3
Q5_c-1. Name the key skills that a candidate should possess for the profession _ 4
Q5_c-4. Name the key skills that a candidate should possess for the profession _ 5

(Write down or choose from the list no more than 5 key skills for the profession)

1.	Management skills
2.	The ability to express thoughts clearly and succinctly
3.	Establishing and maintaining constructive relationships
4.	Leadership
5.	Creativity
6.	Result-oriented performance
7.	Stress resistance
8.	Responsibility
9.	Teamwork
10.	Time management
11.	Knowledge of the state language
12.	Ability to learn
13.	Attentiveness
14.	Tactfulness
15.	Computer knowledge
16.	Work with CRM, ERP systems
17.	Digital and network security
18.	Work with databases
19.	Search and work with information
20.	Foreign Language
21.	Communication skills
22.	Work with documents
23.	Web technologies and programming
24.	Work with technical documentation (drawings, diagrams)
25.	Work with the tool
26.	Work with equipment
27.	Active sales
28.	Work with customers
29.	Work with social networks and media
30.	Design and creative developments
31.	Knowledge of relevant regulations

Q5_d-1. Name the additional skills that a candidate prefers to possess by profession _ 1
Q5_d-2. Name the additional skills that a candidate prefers to possess by profession _ 2
Q5_d-3. Name the additional skills that a candidate prefers to possess by profession _ 3
Q5_d-4. Name the additional skills that a candidate prefers to possess by profession _ 4
Q5_d-5. Name the additional skills that a candidate prefers to possess by profession _ 5
(Write down or choose from the list no more than 3 skills for the profession)

1.	Management skills
2.	The ability to express thoughts clearly and succinctly
3.	Establishing and maintaining constructive relationships
4.	Leadership
5.	Creativity
6.	Result-oriented performance
7.	Stress resistance

8.	Responsibility
9.	Teamwork
10.	Time management
11.	Knowledge of the state language
12.	Ability to learn
13.	Attentiveness
14.	Tactfulness
15.	Computer knowledge
16.	Work with CRM, ERP systems
17.	Digital and network security
18.	Work with databases
19.	Search and work with information
20.	Foreign Language
21.	Communication skills
22.	Work with documents
23.	Web technologies and programming
24.	Work with technical documentation (drawings, diagrams)
25.	Work with the tool
26.	Work with equipment
27.	Active sales
28.	Work with customers
29.	Work with social networks and media
30.	Design and creative developments
31.	Knowledge of relevant regulations

Q5_e. Overall, assess the level of training of VTE graduates?

1	Ample
2	Rather sufficient
3	Average
4	Rather insufficient
5	Insufficient

Q5_f. Overall, assess the level of mastery of digital skills of VTE graduates?

1	Ample
2	Rather sufficient
3	Average
4	Rather nsufficient

Q6_a. Did your company reduce full-time employees during 2023?

1	Yes
2	No

Q6_a1. Mark/indicate the number or percentage of the listed categories of employees that were made redundant during 2023.

f you do not have accurate information, if possible, consult with colleagues or provide an approximate number)

Category of employees	Number	Percentage
Women		
Youth under the age of 25		
Internally displaced persons		
Persons with disabilities		
Veterans of the JFO and the war with the Russian Federation		

Q6. Does the enterprise use the following technologies/tools/devices to perform production tasks? If "Yes", indicate the approximate proportion of employees who use it.

Technologies/tools/devices	Not used	Share of employees				
		1-20%	21-40%	41-60%	61-80%	81-100%
Internet access						
Personal computers, laptops						
Mobile electronic devices (smartphone, tablet)						
Enterprise web page/portal						
Social media pages (Facebook, Instagram, etc.)						
Means of electronic commerce (online stores, services, etc.)						
GPS technologies						
Access control system (ACS)						
Remote service system (RSS)						
Learning Management System (LMS)						
Payment transactions recorders (PTR)						
Customer relationship management system (CRM)						
Enterprise resource management system (ERP)						
Internal electronic document flow (orders, regulations)						
Electronic reporting to state bodies (taxes, pension fund, statistics)						
Online negotiations with counterparties/ clients/colleagues						
Computer equipment update management						
Management of disposal of obsolete computer equipment						
Corporate cloud storage/servers						
Software developed by external partners to the order of the enterprise						
The software is developed by the enterprise						
Big Data technologies of artificial intelligence, for decision-making						
Automated production lines						
Use of robots						

Q7¬_a. Assess, in general, whether the level of digital skills of employees in your company is currently sufficient?

1	Ample
2	Rather sufficient
3	Average
4	Rather insufficient
5	Insufficient

Q8¬_a. Overall, assess the level of digital skills among all job candidates for your company in 2023?

1	Ample
2	Rather sufficient
3	Average
4	Rather insufficient
5	Insufficient

Q9_a. Has the amount of salaries at the enterprise been reviewed during 2023?

1	Yes
2	No

Q9_b. How salaries at the enterprise changed during 2023?

1	Salary increase for key employees	by __%
2	Salary increase for all employees	by __%
3	Salary reduction for certain categories of employees	by __%
4	Salary reduction for all employees	by __%

Q9_c. Does the company plan to raise salaries in 2024?

1	Yes By how much %____________
2	No

Q10_a. Has your company encountered difficulties in recruiting personnel in 2023?

1	Yes
2	No

Q10_b. What difficulties did you encounter when recruiting personnel for these occupations?

1.	Existence/increasing shortage of personnel
2.	Inconsistency of applicants' expectations regarding the amount of salary
3.	The applicants' expectations regarding the social package are overstated
4.	Difficulties related to the location of enterprises (threat to personal safety due to war)
5.	Mobilisation (men's reluctance to officially register for work)
6.	Insufficient qualification of applicants
7.	Candidates do not have the necessary documents (lost documents)
8.	Increasing cost of recruiting services
9.	Other (write down)

Q11_a. Does the company plan to increase the number of employees by July 2024?

1	Yes
2	Rather yes
3	Difficult to answer
4	Rather not
5	No

Q11_b.(1-5) Employees of what professions does the company plan to hire additionally?

The name of the profession	11_c. Indicate how many employees of this profession are planned to be hired (if you do not know exactly, indicate the number that was last recruited for a similar position)	**11d Average salary** (including additional payments), hryvnias
Profession_1		
Profession_2		
Profession_3		
Profession_4		
Profession_5		

Q12_a. Does the company plan to reduce employees by July 2024?

1	Yes
2	Rather yes
3	Difficult to answer
4	Rather not
5	No

Q12_b. Employees of which professions are planned to be made redundant in the next 6 months?

The name of the profession	12_b. Indicate how many employees of this profession are planned to be made redundant (if you do not know exactly, indicate the approximate number)
Profession_1	
Profession_2	
Profession_3	
Profession_4	
Profession_5	

Q13_a. Do you expect difficulties with the selection of employees in 2024?

1	Yes
2	Rather yes
3	Difficult to answer
4	Rather not
5	No

Q13_b. What factors can cause difficulties in the selection of employees in 2024?

1.	Existence/increasing shortage of personnel
2.	Inconsistency of applicants' expectations regarding the amount of salary
3.	Exaggerated expectations regarding the social package
4.	Difficulties related to the location of enterprises (threat to personal safety due to war)
5.	Mobilisation (reluctance of men to officially register for work)
6.	Insufficient qualification of applicants
7.	Candidates do not have the necessary documents (lost documents)

8.	Increasing cost of recruiting services
9.	Other (write down)

Q13_c. What programs of additional social support for personnel does your enterprise provide?

1.	Private health insurance	Yes	No
2.	Free delivery to the place of work	Yes	No
3.	Subscription to the gym/swimming pool	Yes	No
4.	Provision of food	Yes	No
5.	Provision of housing (rented housing or dormitory)	Yes	No
6.	Payment of mobile communication	Yes	No
7.	Fare payment	Yes	No
8.	Wellness allowance	Yes	No
9.	Tuition fee (foreign language, personal development courses, etc.)		
10.	Other (write down)	Yes	No

Q13_1. Is your company ready to hire the persons listed until July 2024?

No	Category	Yes	No
1.	Persons with disabilities		
2.	Veterans of the JFO and the war with the Russian Federation		
3.	Internally displaced persons		

Q13_2. What obstacles exist for the employment of the listed categories?

No	Category	Yes
1.	Persons with disabilities	1 Warning about the lower productivity of persons in this category 2 Unprepared workplaces 3 Warning regarding the low motivation of persons in this category 4 Lack of knowledge on how to deal with people belonging to this category 5 Normative and regulatory restrictions 6 Persons of this category do not apply for work 7 Lack of quality services or infrastructure needed in this category (e.g. medical care, psychological support, accessible transport, housing, childcare) 8 Other 9 There are no obstacles
2.	Veterans of the JFO and the war with the Russian Federation	1 Warning about the lower productivity of persons in this category 2 Unprepared workplaces 3 Warning regarding the low motivation of persons in this category 4 Lack of knowledge on how to deal with people belonging to this category 5 Normative and regulatory restrictions 6 Persons of this category do not apply for work 7 Lack of quality services or infrastructure needed in this category (e.g. medical care, psychological support, accessible transport, housing, childcare) 8 Other 9 There are no obstacles
3.	Internally displaced persons	1 Warning about the lower productivity of persons in this category 2 Unprepared workplaces 3 Warning regarding the low motivation of persons in this category 4 Lack of knowledge on how to deal with people belonging to this category 5 Normative and regulatory restrictions 6 Persons of this category do not apply for work 7 Lack of quality services or infrastructure needed in this category (e.g. medical care, psychological support, accessible transport, housing, childcare) 8 Other 9 There are no obstacles

Q13_3. What support does the enterprise need to employ more people belonging to the listed categories?

No	Category	Types of support
1.	Persons with disabilities	1 Financial subsidy for the payment of salaries 2 Financial support for job adaptation 3 Financial assistance for additional staff supporting these individuals 4 Organization of training in working skills with persons belonging to this category 5 Financing of education of persons of this category 6 Improving the quality and availability of services or infrastructure needed by this category (e.g. medical care, psychological support, accessible transport, housing, childcare) 7 Other 8 The enterprise does not need support
2.	Veterans of the JFO and the war with the Russian Federation	1 Financial subsidy for the payment of salaries 2 Financial support for job adaptation 3 Financial assistance for additional staff supporting these individuals 4 Organization of training in working skills with persons belonging to this category 5 Financing of education of persons of this category 6 Improving the quality and availability of services or infrastructure needed by this category (e.g. medical care, psychological support, accessible transport, housing, childcare) 7 Other 8 The enterprise does not need support
3.	Internally displaced persons	1 Financial subsidy for the payment of salaries 2 Financial support for job adaptation 3 Financial assistance for additional staff supporting these individuals 4 Organization of training in working skills with persons belonging to this category 5 Financing of education of persons of this category 6 Improving the quality and availability of services or infrastructure needed by this category (e.g. medical care, psychological support, accessible transport, housing, childcare) 7 Other 8 The enterprise does not need support

Q14. Did your company provide any form of training for your employees in 2023?

1	Yes
2	No
3	I do not know

Q15_a. What percentage of employees participated in training during 2023?

If you do not have accurate information, if possible, consult with colleagues or provide an approximate number___________

Q15_b. Compared to 2022, how has the number of employees who participated in training changed?

1	Increased by _____%
2	Didn't change
3	Decreased by ______%

Q15_c. How will the number of employees participating in training in 2024 change compared to 2023?

1	Will increase by _____%
2	Will not change
3	Will decrease by ______%

Q16_a. In what forms does the company provide training / professional development of personnel?

1. Training for new employees
2. Short-term profile trainings from external providers
3. Permanent internal training programs
4. Online educational platforms (Coursera, Prometheus, etc.)
5. Obtaining international and professional certifications
6. Periodic trainings from suppliers of products or equipment
7. Training of employees in own educational centres under licenses of the Ministry of Education and Science
8. Training of employees in vocational and technical education institutions
9. Confirmation of full or partial professional qualification of persons in qualification centres
10. Training of employees in higher education institutions
11. On-the-job training
12. Other (write down)
13. None of these

Q17_a. Does your company cooperate with vocational and technical education institutions?

1	Yes
2	No

Q17_b. In what forms does your company cooperate with vocational and technical education institutions?

1. Dual form of education
2. Preparation of educational standards
3. Development of professional standards
4. Organization of production practice
5. Provision of equipment and other assistance
6. Participation in supervisory boards of educational institutions
7. Improving the qualifications of the company's employees in an educational institution
8. Improving the qualifications of teachers and masters of the educational institution at the enterprise
9. Organization of recruitment campaigns for the enterprise
10. Other (write down)

Q17_c. For what reasons does your company NOT cooperate with vocational and technical education institutions?

1. There is no need
2. We have a negative experience of cooperation
3. Cooperation is not constructive because of bureaucracy
4. Institutions are not interested in cooperation
5. Vocational and technical education institutions do not prepare the personnel we need
6. Other (write down)

Q18_a. Does your company cooperate with the State Employment Service?

1	Yes
2	No

Q18_b. In what forms does your company cooperate with the State Employment Service?

1. Placement of job vacancies on the SES portal
2. Receiving consultations on issues of labour legislation
3. Receiving a permit for the employment of foreigners
4. Receiving partial unemployment benefits
5. Receiving compensation for employment of registered unemployed
6. Training of employees according to the needs of the enterprise
7. Selection of candidates for vacant positions by SES recruiters
8. Use of other compensation programs
9. Other (write down)

Q18_c. Estimate, in general, how satisfied you are with cooperation with the State Employment Service.

1	Satisfied
2	Rather satisfied
3	50/50
4	Rather not satisfied
5	Not satisfied

Q18_d. What aspects of the State Employment Service are best organized?

Q18_e. What aspects of the State Employment Service should be improved?

Q18_f. For what reasons does your company NOT cooperate with the State Employment Service?

1. Our company does not need it
2. We do not know how employment centres can be useful
3. The need for a large number of reports and documents
4. Lack of a tangible result of cooperation
5. Imperfection of the mechanism of selecting the unemployed for job vacancies
6. Lack of motivation of the unemployed for employment
7. Other (write down)

Q18_g. Are you ready to cooperate with the State Employment Service regarding professional training?

1	Yes
2	No

Q18_h. Are you interested in compensation programs of the State Employment Service?

1	Yes
2	No
3	I need additional information (clarification)

Check and, if necessary, correct the name of your company

To receive research results, information on compensation programs, and other services of the State Employment Service, please leave your contact details (phone or e-mail).

Thank you for participating in the survey!

6.2 Statistics and survey data (Tables and charts)

Annex 6.2.1. Structure of enterprises by types of economic activity, %

Column 1	1 sq. 2020	2 square meters 2020	3 square meters 2020	4 square meters 2020	1 sq. 2021	2 square meters 2021	3 square meters 2021	4 square meters 2021	1 sq. 2022	2 square meters 2022	3 square meters 2022	4 square meters 2022	1 sq. 2023	2 square meters 2023	3 square meters 2023
Trade	38.0	38.3	37.6	37.7	37.9	38.1	37.8	36.7	37.6	36.4	35.9	35.8	35.7	35.7	35.8
Processing industry	8.7	8.7	8.7	8.6	8.6	7.9	8.6	8.4	8.6	8.7	8.8	8.7	8.7	8.7	8.7
Science and professional and technical activity	5.7	5.7	5.8	5.7	5.7	5.8	5.7	5.7	5.8	5.9	5.9	5.8	5.8	5.8	5.7
Administrative and support services	5.7	5.7	5.8	5.7	5.8	5.9	6.0	5.8	6.0	6.3	6.2	6.2	6.1	6.1	6.1
Real estate	5.4	5.5	5.6	5.5	5.6	5.5	5.7	5.5	5.7	6.0	6.1	6.0	6.1	6.1	6.1
Agriculture, forestry and fisheries	5.2	5.2	5.5	5.5	5.4	4.9	5.7	5.6	5.5	5.8	6.0	6.0	5.8	5.7	5.7
Construction	5.0	4.8	5.0	5.0	4.9	4.4	4.9	4.8	4.9	4.8	4.9	4.9	4.9	4.9	4.9
Transport and logistics	5.0	4.9	5.0	5.1	5.0	4.7	5.0	4.9	5.1	5.0	5.1	5.4	5.5	5.6	5.6
Hotels and restaurants	4.6	4.7	4.3	4.5	4.3	4.2	4.5	4.6	4.6	4.2	4.1	4.2	4.2	4.3	4.5
Other services	3.9	3.8	3.8	3.7	3.7	4.7	3.5	3.4	3.5	3.4	3.4	3.4	3.4	3.3	3.3
Governance	2.8	2.7	2.7	2.9	2.7	2.1	1.8	2.7	1.7	2.0	2.0	2.0	2.0	2.1	2.0
Healthcare	2.7	2.7	2.8	2.8	2.8	2.7	3.0	3.4	3.1	3.3	3.3	3.3	3.4	3.5	3.5
Information and telecommunications	2.7	2.6	2.7	2.7	2.7	4.4	2.7	2.7	2.8	3.0	3.0	2.9	2.9	2.9	2.8
Education	1.8	1.9	1.9	1.9	1.9	1.9	2.1	2.9	2.2	2.4	2.4	2.4	2.4	2.4	2.4
Arts, Entertainment, Sports	0.9	0.9	0.9	0.9	0.9	0.9	0.9	1.1	0.9	0.9	0.9	0.9	0.9	0.9	0.9
Finance and insurance	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Water supply	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6
Energy	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.6
Mining industry	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3
Extraterritorial organizations	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Activities of households	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

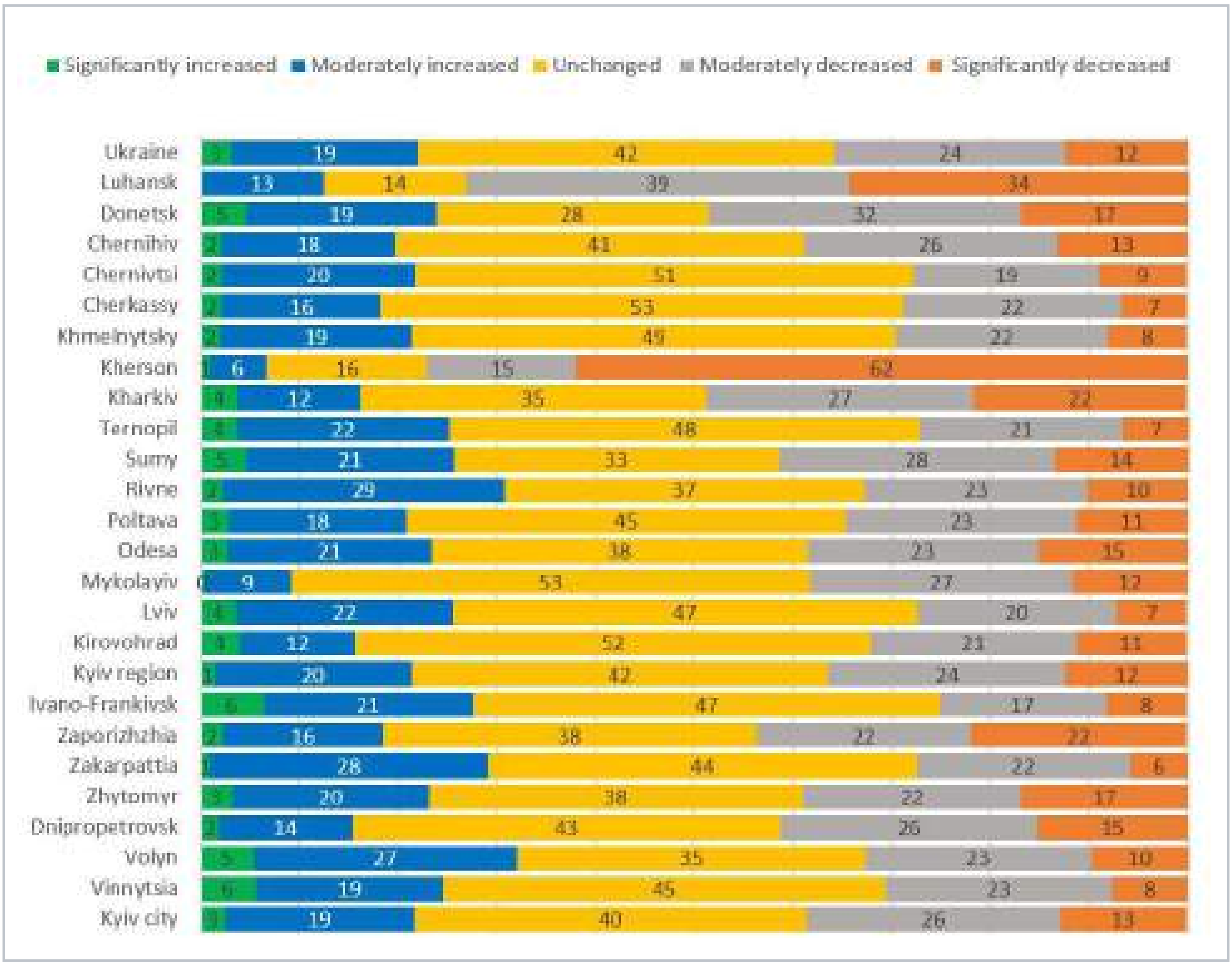
Annex 6.2.2. The number of enterprises of all forms of ownership in % compared to the previous period (Pension Fund of Ukraine, 2023).

Sector	1 sq. 2020	2 square meters 2020	3 square meters 2020	4 square meters 2020	1 sq. 2021	2 square meters 2021	3 square meters 2021	4 square meters 2021	1 sq. 2022	2 square meters 2022	3 square meters 2022	4 square meters 2022	1 sq. 2023	2 square meters 2023	3 square meters 2023
Trade	249307	100.4	96.1	102.4	97.5	114.8	83.8	101.7	100.5	80.0	94.1	101.8	101.1	101.0	102.8
Processing industry	57203	99.2	98.0	101.3	97.2	105.1	91.3	101.5	100.7	83.7	96.3	101.4	101.6	101.0	102.0
Science and professional and technical activity	37564	99.0	99.0	100.7	97.7	116.5	82.6	104.7	99.3	84.8	94.5	100.7	101.7	100.2	100.5
Administrative and support services	37347	100.4	98.9	101.2	98.2	116.0	84.8	101.9	102.3	86.2	94.8	100.4	101.4	101.0	101.0
Real estate	35806	100.6	99.7	100.7	98.7	111.4	88.4	101.4	101.7	80.0	96.8	101.6	102.3	101.7	101.2
Agriculture, forestry and fisheries	34278	98.8	104.5	101.8	94.3	104.6	97.2	103.1	97.1	87.6	99.0	101.0	99.1	99.2	102.8
Construction	32593	97.3	100.7	101.5	96.6	102.0	93.0	102.2	102.1	80.9	96.3	102.3	102.7	99.3	103.1
Transport and logistics	32581	98.6	98.9	103.9	96.3	108.2	88.3	104.0	100.8	81.8	97.7	107.2	103.9	102.4	102.6
Hotels and restaurants	30352	100.4	90.8	106.2	93.4	111.9	90.1	105.3	99.3	75.7	93.7	104.4	101.0	102.9	106.9
Other services	25392	97.8	96.6	101.1	95.9	146.8	83.0	101.9	100.6	79.8	94.4	101.7	102.1	100.1	102.5
Governance	18244	95.4	99.4	107.9	92.9	86.4	72.7	158.5	82.8	93.6	96.7	101.8	102.9	103.1	100.9
Healthcare	17480	100.8	99.9	102.3	100.3	108.7	92.1	119.9	88.4	88.0	97.6	102.5	103.3	102.6	102.2
Information and telecommunications	17460	99.3	98.6	101.5	98.4	185.6	52.8	102.1	102.5	87.8	95.2	100.1	101.7	99.6	100.6
Education	12035	101.7	97.0	102.0	99.9	113.5	92.5	143.5	74.2	91.3	94.5	101.6	103.0	102.6	101.5
Arts, Entertainment, Sports	6169	99.2	95.8	101.6	96.1	109.8	89.0	121.0	85.7	81.9	95.3	100.3	100.5	101.8	104.6
Finance and insurance	4223	98.0	99.4	98.5	96.9	111.5	85.6	99.9	101.5	85.7	95.4	102.1	101.3	97.4	98.3
Water supply	4059	99.6	99.7	100.5	98.9	101.9	91.7	100.9	100.6	84.0	94.5	99.3	101.3	101.6	101.0
Energy	3286	101.0	99.9	101.7	99.9	100.9	95.1	101.0	104.2	91.1	96.3	100.6	101.8	101.5	100.5
Mining industry	1530	98.5	99.8	100.0	98.3	102.8	96.5	100.8	101.7	88.6	96.4	100.5	101.0	101.6	101.5
Extraterritorial organizations	64	98.4	96.8	95.1	108.6	100.0	101.6	104.7	71.6	83.3	115.0	117.4	100.0	101.9	0.0
Activities of households	13	107.7	92.9	176.9	108.7	92.0	78.3	94.4	64.7	90.9	130.0	84.6	90.9	90.0	0.0

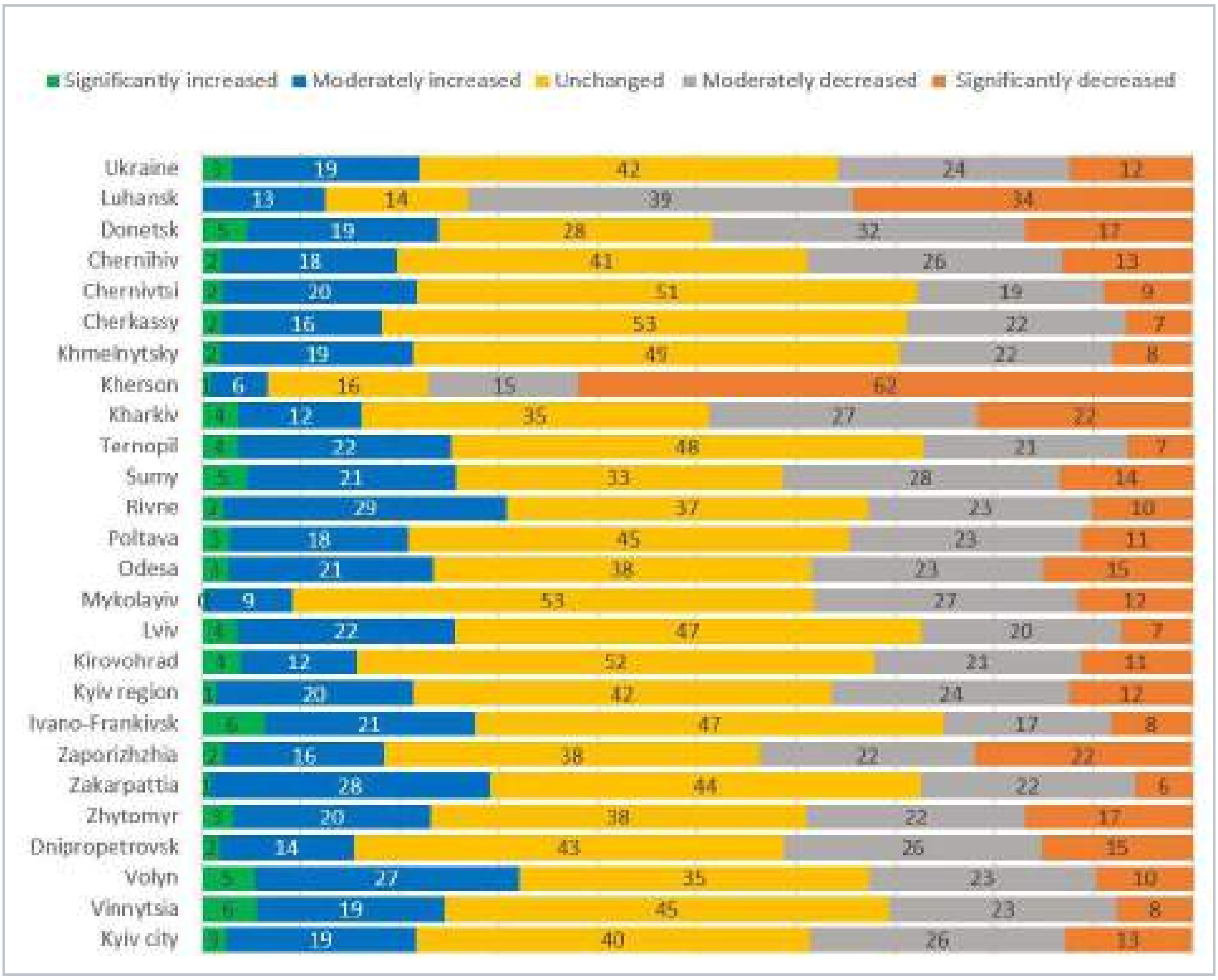
Annex 6.2.3. Changes in average wages among employed people, thousand UAH

	1 sq. 2020	3 square meters 2020	1 sq. 2021	2 square meters 2021	3 square meters 2021	4 square meters 2021	1 sq. 2022	3 square meters 2022	4 square meters 2022	1 sq. 2023	2 square meters 2023	3 square meters 2023
The average salary among employees at budget VTEs (thousands of hryvnias)												
Women	8.8	9.9	12.6	12.2	13.5	12.5	16.4	15.9	14.8	17.8	13.6	16.1
Men	11.4	13.0	17.9	14.5	15.3	14.4	19.1	32.3	35.4	38.5	27.3	31.9
Women's wages in % of men's wages	77.7	76.0	70.5	84.2	88.3	86.8	85.9	49.2	41.9	46.3	49.8	50.6
Average salary among all employees (thousand UAH)												
Women	8.1	8.8	10.5	10.5	11.2	10.9	13.0	11.8	11.9	13.9	12.2	13.4
Men	10.5	22.5	13.8	13.2	14.5	13.8	16.5	17.8	18.5	21.4	18.3	19.4
Women's wages in % of men's wages	76.7	39.1	76.1	79.6	77.6	79.2	78.3	66.3	64.1	65.0	66.9	69.1

Annex 6.2.4. Estimated production volumes in 2023 by region, %



Annex 6.2.5. Estimated changes in production volumes in 2024 by region, %



Annex 6.2.6. The most in-demand occupations and skills and expertise by types of economic activity

AGRICULTURE, FORESTRY AND FISHING

Occupations hired most often in 2023		Skills and expertise
1	Tractor driver/machine operator of agricultural (forestry) production	Responsibility Attentiveness Teamwork Work with equipment Work with the tool Stress resistance Ability to learn Work with documents Focus on the result Computer skills
2	Auxiliary worker	
3	Motor vehicle driver	
4	Tractor driver	
5	Accountant	
6	Worker in complex maintenance of agricultural production	
7	Watchmen	
8	Security guard	
9	Agronomist	
10	Farm worker	

B MINING AND QUARRYING

Occupations hired most often in 2023		Skills and expertise
1	Motor vehicle driver	Responsibility Attentiveness Work with equipment Work with the tool Teamwork Stress resistance Ability to learn Work with documents Knowledge of relevant regulations Computer skills
2	Electric fitter (locksmith) on duty and equipment repair	
3	Underground miner	
4	Conveyor operator	
5	Auxiliary worker	
6	Coal heaver of electricity and gas-fired boiler house	
7	Underground electrical fitter	
8	Security guard	
9	Excavator driver	
10	Accountant	

C PROCESSING INDUSTRY

Occupations hired most often in 2023		Skills and expertise
1	Seamstress	Responsibility Attentiveness Work with equipment Teamwork Work with the tool Ability to learn Stress resistance
2	Motor vehicle driver	
3	Auxiliary worker	
4	Accountant	
5	Stacker-packer	
6	Long-distance driver	

7	Maintenance fitter	Focus on the result Computer skills Work with documents
8	Mill-man	
9	Baker	
10	Construction metal worker	

D ENERGY INDUSTRY

Occupations hired most often in 2023		Skills and expertise
1	Boiler house operator	Responsibility Attentiveness Work with equipment Work with the tool Teamwork Stress resistance Ability to learn Knowledge of relevant regulations Work with documents Computer skills
2	Motor vehicle driver	
3	Engineer	
4	Electric and gas welder	
5	Boiler house fireman	
6	Locksmith for operation and repair of gas equipment	
7	Accountant	
8	Electrician operating distribution networks	
9	Maintenance fitter	
10	Inspector of gas facilities	

E WATER SUPPLY

Occupations hired most often in 2023		Skills and expertise
1	Motor vehicle driver	Responsibility Attentiveness Work with the tool Work with equipment Teamwork Stress resistance Work with documents Ability to learn Computer skills Communication skills
2	Locksmith of emergency and recovery works	
3	Gardening and landscaping worker	
4	Pumping unit operator	
5	Waterworks controller	
6	Auxiliary worker	
7	Accountant	
8	Long-distance driver	
9	Maintenance fitter	
10	Area cleaner	

F CONSTRUCTION

Occupations hired most often in 2023		Skills and expertise
1	Motor vehicle driver	Responsibility Attentiveness Work with the tool Teamwork Work with equipment Stress resistance
2	Auxiliary worker	
3	Accountant	
4	Asphalt worker	
5	Bricklayer	

6	Concrete worker	Work with documents Ability to learn Work with technical documentation (drawings, diagrams) Focus on the result
7	Plasterer	
8	Coal heaver of electricity and gas-fired boiler house	
9	Work performer	
10	Painter	

G TRADE

Occupations hired most often in 2023		Skills and expertise
1	Seller of food products	Responsibility Attentiveness Work with clients Teamwork Stress resistance Computer skills Tactfulness Communication skills Active sales Knowledge of the state language
2	Seller of non-food products	
3	Sales manager	
4	Motor vehicle driver	
5	Accountant	
6	Pharmacist	
7	Cashier of the trading hall	
8	Sales representative	
9	Long-distance driver	
10	Administrator	

H TRANSPORT AND LOGISTICS

Occupations hired most often in 2023		Skills and expertise
1	Motor vehicle driver	Responsibility Attentiveness Stress resistance Teamwork Work with equipment Work with documents Work with the tool Work with clients Computer skills Tactfulness
2	Accountant	
3	Auxiliary worker	
4	Cashier (at the enterprise, institution, organization)	
5	Operator of grain processing	
6	Repairman of wheeled vehicles	
7	Rolling stock repairman	
8	Security guard	
9	Logistics manager	
10	Long-distance driver	

I HOTELS AND RESTAURANTS

Occupations hired most often in 2023		Skills and expertise
1	Cook	Responsibility Attentiveness Teamwork Work with clients
2	Waiter	
3	Bartender	
4	Seller of food products	

5	Barista	Stress resistance Tactfulness Ability to learn Work with equipment Knowledge of the state language Communication skills
6	Administrator	
7	Maid	
8	Kitchen worker	
9	Cleaner of office premises	
10	Auxiliary worker	

J INFORMATION AND TELECOMMUNICATIONS

Occupations hired most often in 2023		Skills and expertise
1	Accountant	Computer skills Responsibility Attentiveness Teamwork Work with clients Work with documents Work with equipment Knowledge of the state language Ability to learn Stress resistance
2	Software engineer	
3	Cleaner of office premises	
4	Specialist	
5	Reporter	
6	Communication fitter - cableman	
7	Administrator	
8	Motor transport dispatcher	
9	Binder	
10	Computer systems engineer	

K FINANCE AND INSURANCE

Occupations hired most often in 2023		Skills and expertise
1	Cashier (in a bank)	Work with clients Responsibility Computer skills Attentiveness Knowledge of the state language Work with documents Stress resistance Teamwork Knowledge of relevant regulations Working with databases
2	Specialist	
3	Economist	
4	Accountant	
5	Insurance agent	
6	Legal adviser	
7	Teller	
8	Head cashier	
9	Administrator	
10	Cashier (at the enterprise, institution, organization)	

L REAL ESTATE

Occupations hired most often in 2023		Skills and expertise
1	Area cleaner	Responsibility Attentiveness Teamwork Stress resistance
2	Accountant	
3	Cleaner of office premises	
4	Janitor	

5	Security guard	Work with documents Work with the tool Work with clients Tactfulness Computer skills Work with equipment
6	Motor vehicle driver	
7	Watchman	
8	Plumber	
9	Administrator	
10	Auxiliary worker	

M SCIENCE AND PROFESSIONAL AND TECHNICAL ACTIVITIES

Occupations hired most often in 2023		Skills and expertise
1	Doctor of veterinary medicine	Responsibility Attentiveness Computer skills Work with documents Knowledge of relevant regulations Knowledge of the state language Teamwork Work with clients Stress resistance Work with equipment
2	Accountant	
3	Engineer	
4	Motor vehicle driver	
5	Watchman	
6	Sales manager	
7	Lawyer	
8	Administrator	
9	Cleaner of office premises	
10	Surveyor	

N ADMINISTRATIVE AND SUPPORT SERVICES

Occupations hired most often in 2023		Skills and expertise
1	Security guard	Responsibility Attentiveness Teamwork Stress resistance Work with the tool Work with equipment Tactfulness Knowledge of the state language Communication skills Computer skills
2	Janitor	
3	Motor vehicle driver	
4	Area cleaner	
5	Gardening and landscaping worker	
6	Worker for complex cleaning and maintenance of buildings with adjacent territories	
7	Accountant	
8	Cleaner of office premises	
9	Plumber	
10	Landscaper	

Q HEALTH CARE

Occupations hired most often in 2023		Skills and expertise
1	Nurse (medical brother)	Responsibility Attentiveness Teamwork
2	Assistant nurse	
3	Doctor	

4	Motor vehicle driver	Stress resistance Work with the tool Work with equipment Tactfulness Knowledge of the state language Communication skills
5	Assistant nursing sister (assistant medical brother)	
6	Accountant	
7	Social worker	
8	General practitioner / family doctor	
9	Dentist	
10	Administrator	

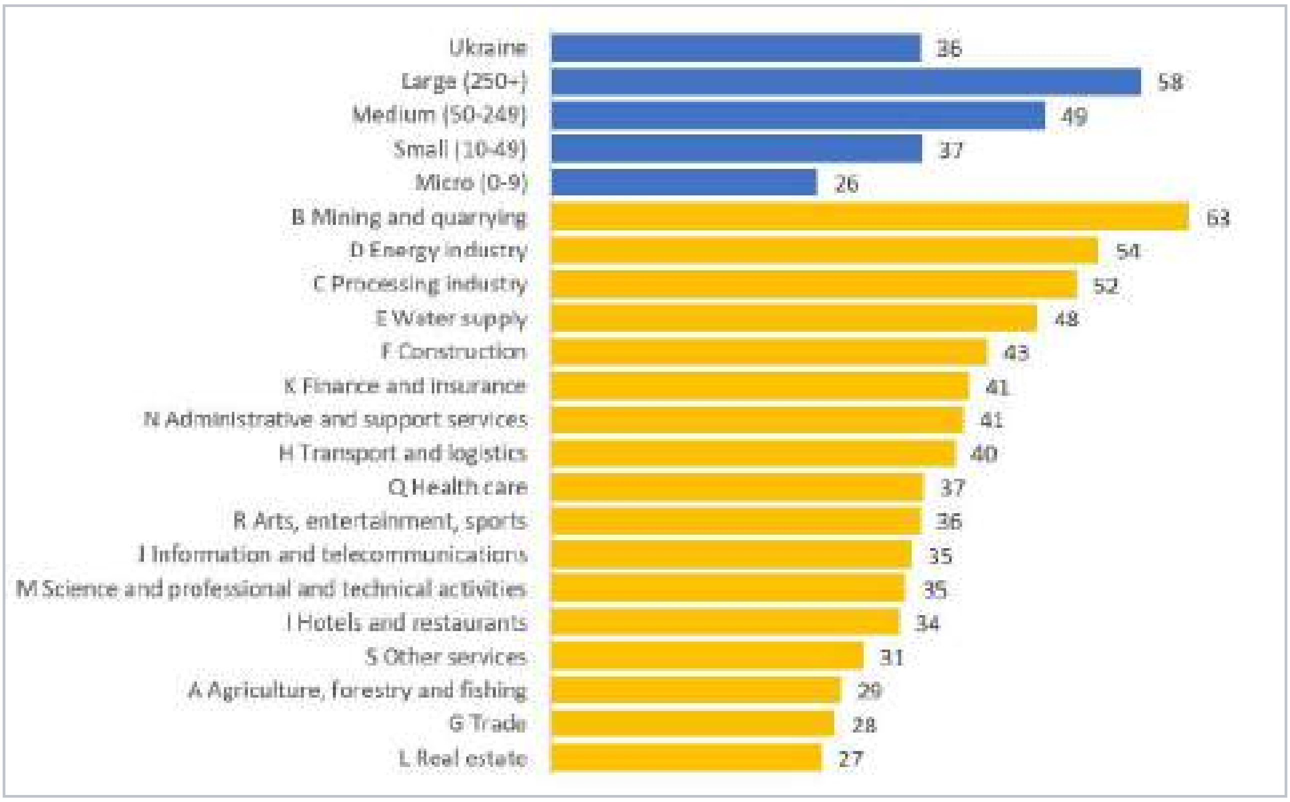
R ARTS, ENTERTAINMENT, SPORTS

Occupations hired most often in 2023		Skills and expertise
1	Cleaner of office premises	Responsibility Attentiveness Teamwork Knowledge of the state language Communication skills Stress resistance Computer skills Creativity Work with documents Tactfulness
2	Librarian	
3	Accountant	
4	Administrator	
5	Gardening and landscaping worker	
6	Sports trainer (sports school, section, etc.)	
7	Actor (artist) of theatre, cinema, etc.	
8	Watchman	
9	Hobby-circle supervisor	
10	Facilitator	

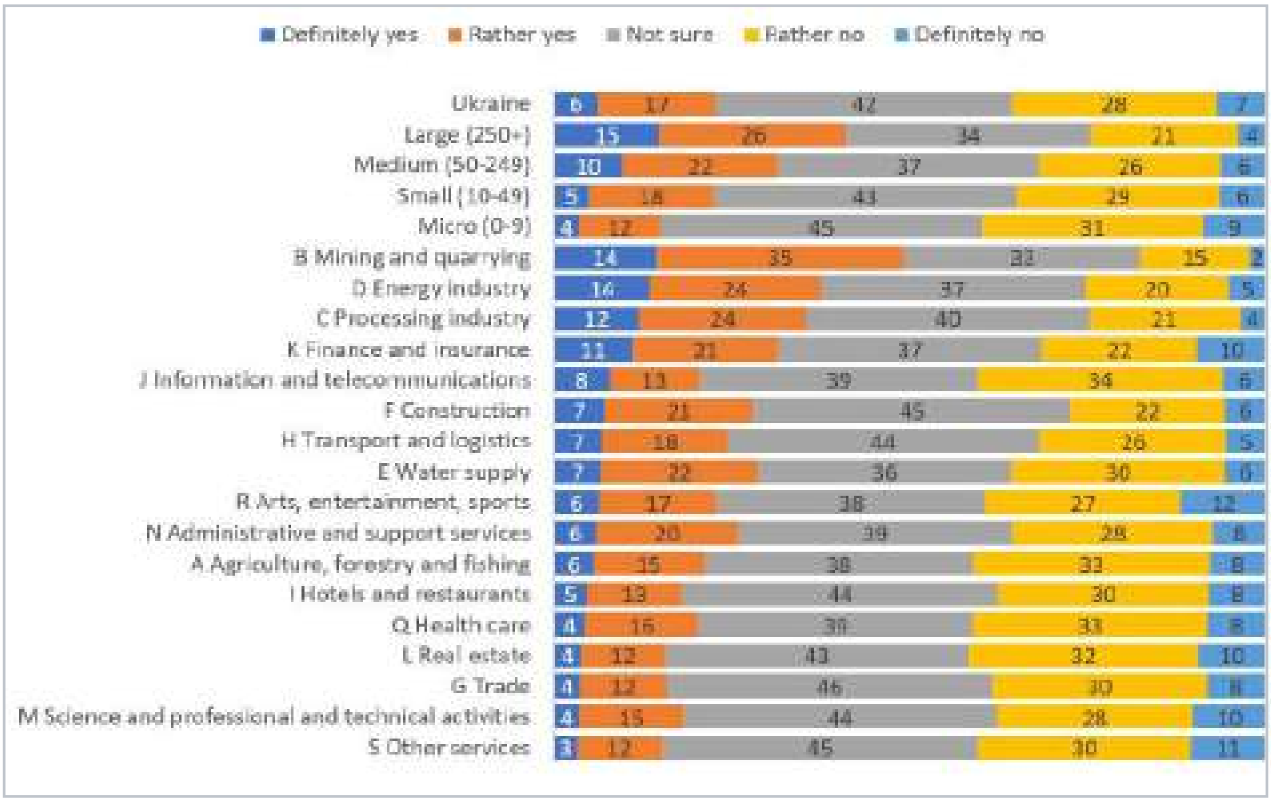
S OTHER SERVICES

Occupations hired most often in 2023		Skills and expertise
1	Hairdresser (hair stylist)	Responsibility Attentiveness Work with clients Stress resistance Teamwork Communication skills Tactfulness Ability to learn Work with the tool Knowledge of the state language
2	Administrator	
3	Nail technician	
4	Sales manager	
5	Seller of non-food products	
6	Cleaner of office premises	
7	Accountant	
8	Seamstress	
9	Funeral services worker	
10	Watchman	

Annex 6.2.7. Enterprises that had difficulty recruiting employees during 2023 by size and types of economic activity, %

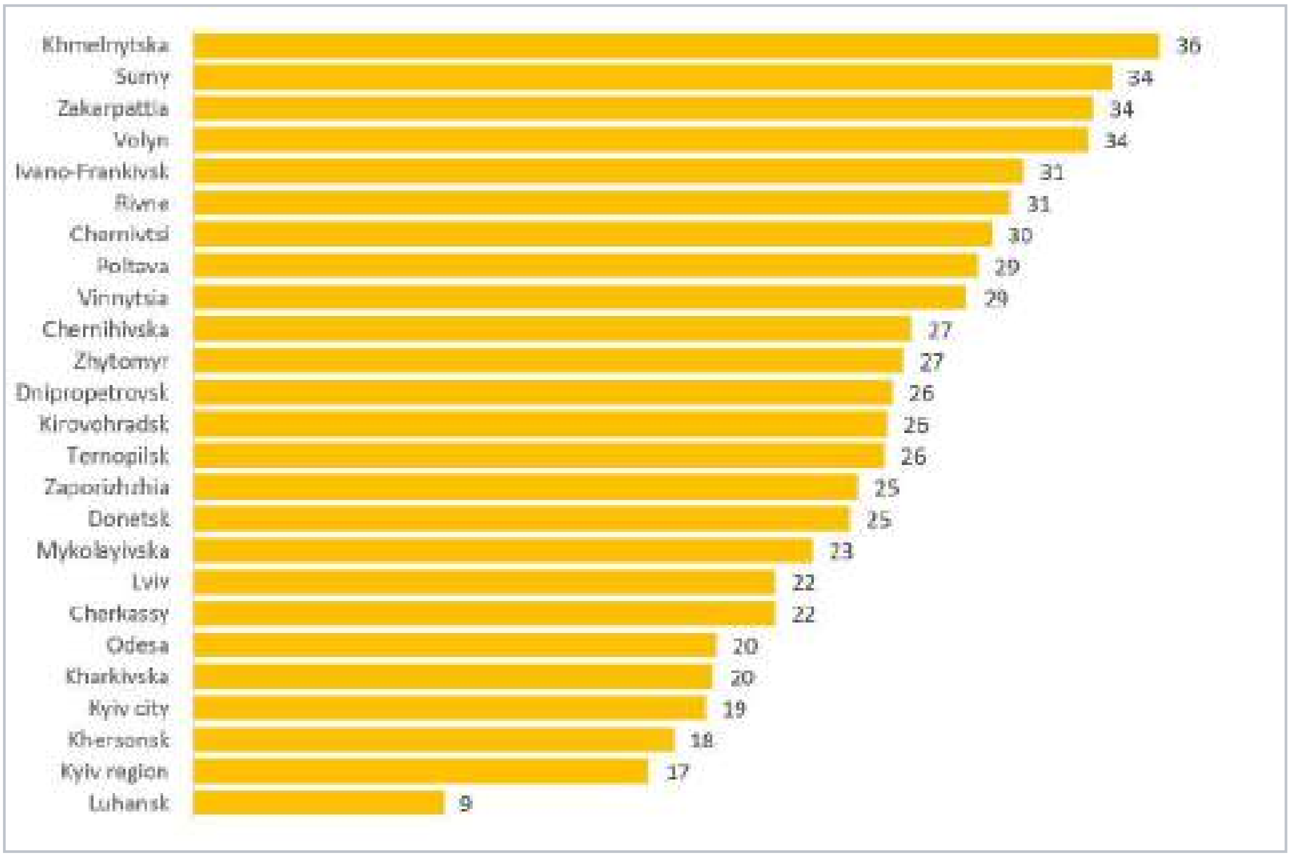


Annex 6.2.8. Expected difficulties in recruiting employees during 2024 by size and types of economic activity %



Annex 6.2.9. The percentage of personnel who underwent training during 2023, %

Annex 6.2.10. The percentage of personnel who underwent training during 2023, %



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