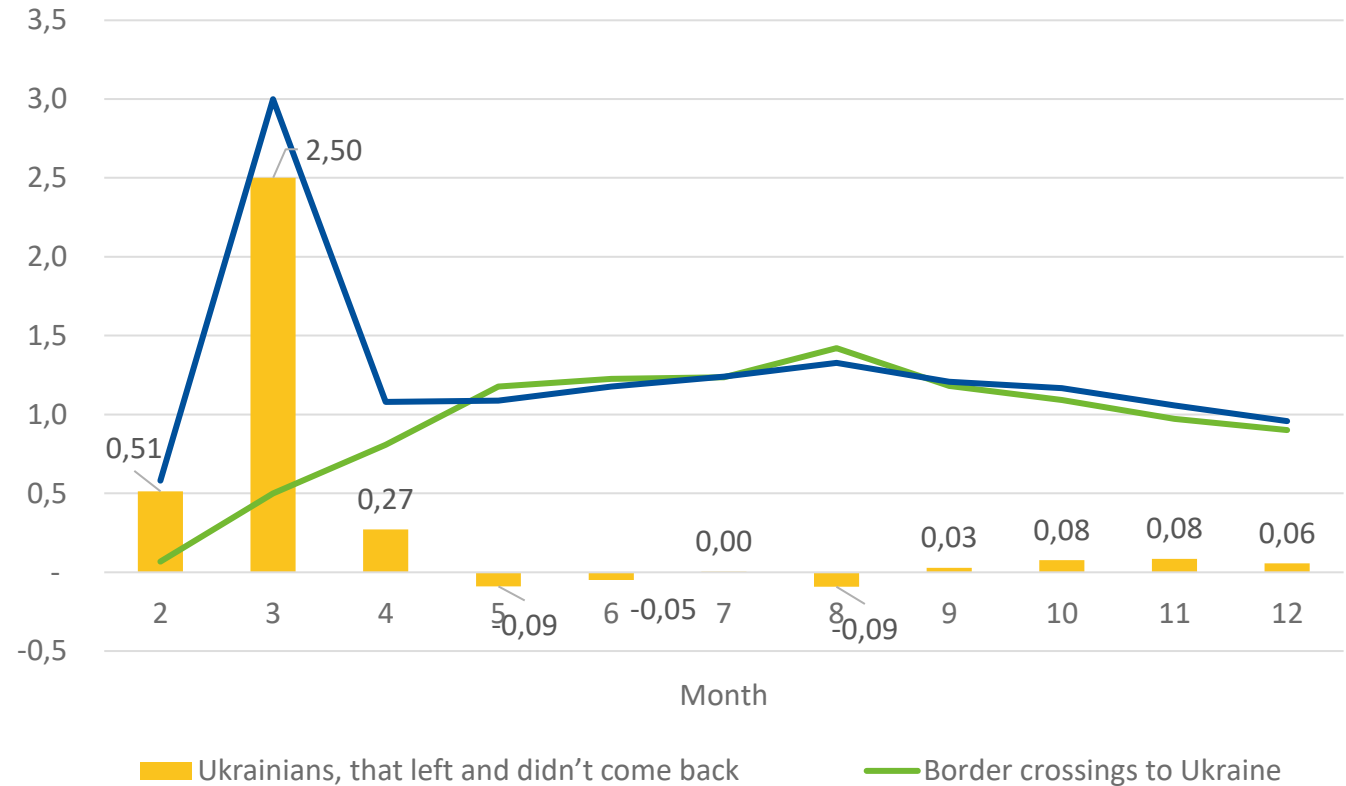




UKRAINIAN REFUGEES: WHO ARE THEY, WHERE DID THEY COME FROM AND HOW TO RETURN THEM?

HOW MANY UKRAINIAN REFUGEES FLED THE COUNTRY?

- Estimates vary depending on the data source
- 3.8-4.7 million in Europe, the USA and Canada
- ~1.5 million in Russia
- During the summer, more Ukrainians returned than left, but this trend has changed since the start of the infrastructure shelling
- Another 100-200 thousand Ukrainians may leave abroad during the winter

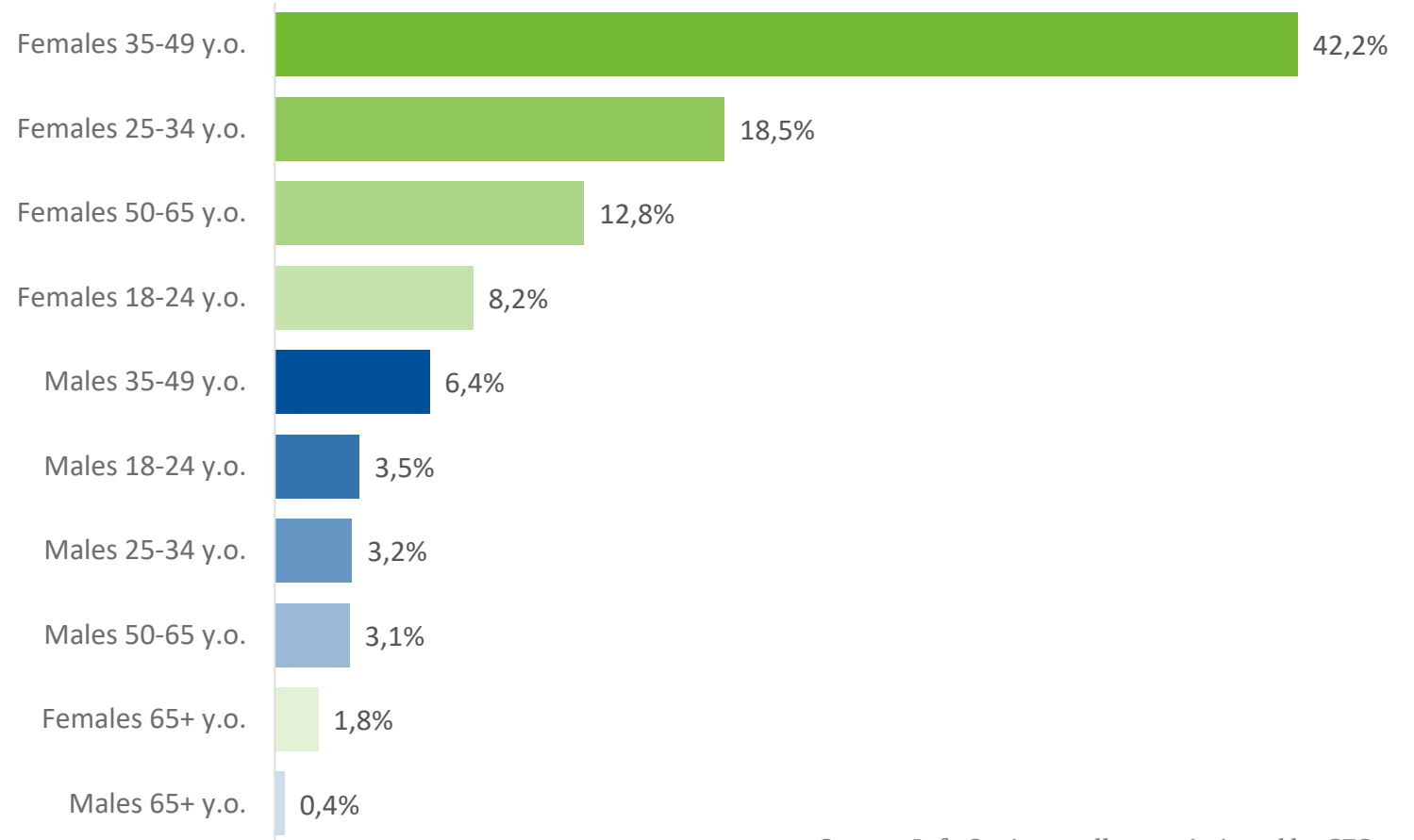


Source: The UN Refugee Agency, based on data from government agencies in Poland, Slovakia, Hungary and Moldova. Data for Poland and Slovakia from February 24 to December 27, 2022. Data on crossings from Ukraine to Romania from February 24 to December 20, data on crossings from Romania to Ukraine from February 24 to December 18. Data for Moldova from February 24 to March 11 are taken from Romania's data and include only those Ukrainians who left to Romania through Moldova. From March 11 to December 25, data for Moldova include all Ukrainians who crossed the border with Moldova. Data on border crossings from Hungary to Ukraine are not available. Therefore, it is assumed that the percentage of Ukrainians returning from Hungary to Ukraine each month is the average return rate for other EU countries that share a border with Ukraine.

WHO ARE THEY?

Based on a survey commissioned by CES

- The largest group is women aged 35-49
- On average, there are 1.07 children per 1 adult

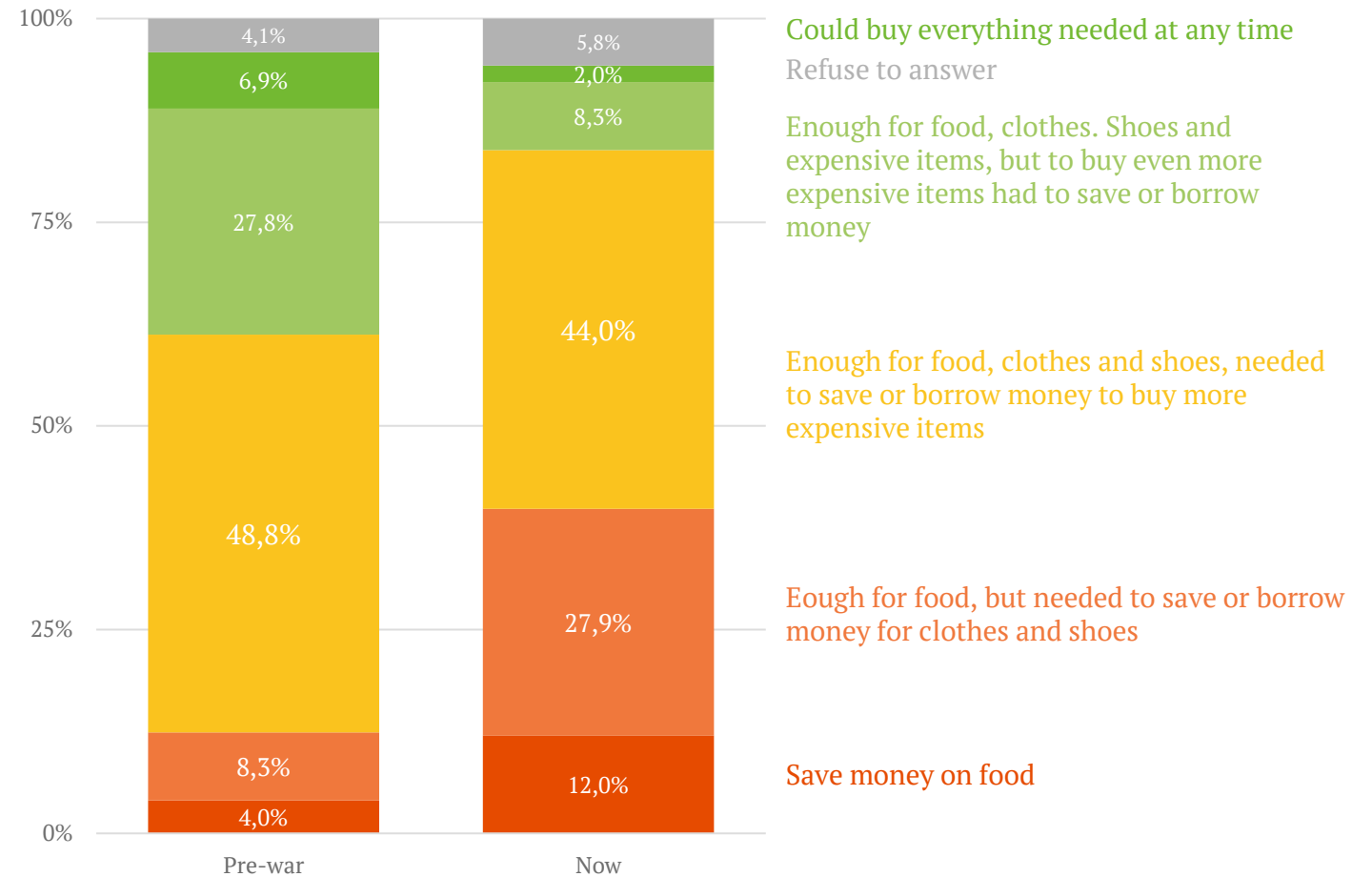


Source: Info Sapiens poll commissioned by CES

WHO ARE THEY?

Based on a survey commissioned by CES

- 66% have higher education (compared to 29% of Ukrainians and 33% of the EU population)
- 42% have enough money only for food or not enough for food (compared to 12% before the full-scale invasion)



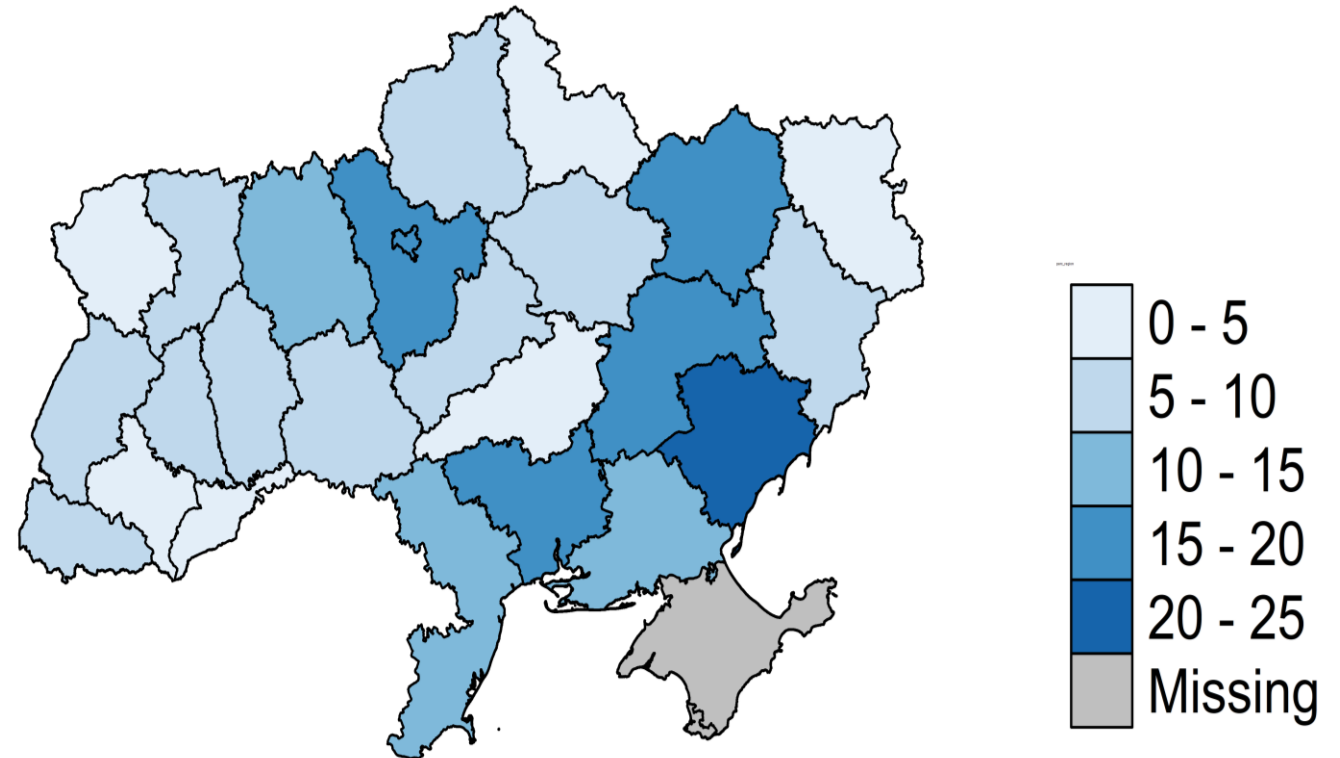
Source: Info Sapiens poll commissioned by CES

WHO ARE THEY?

Based on a survey commissioned by CES

- One quarter of the population fled abroad from Zaporizhzhia region, and 20% from Kyiv and Kyiv region
- No more than 10% of the population from Western Ukraine left each region, and only 1% from Luhansk

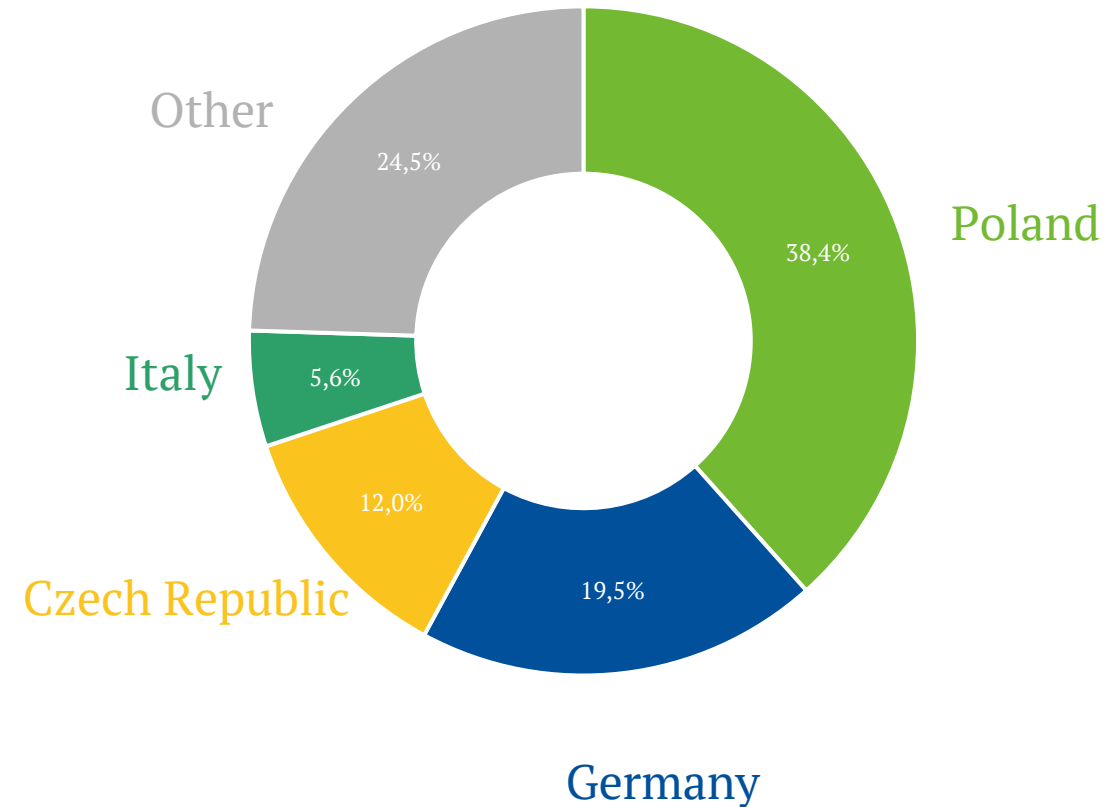
% of refugees from the population of the region



Source: Info Sapiens poll commissioned by CES. The calculation was based on the average estimate of the number of Ukrainians abroad (excluding Russia and Belarus) - 4.25 million. The source of population data by region is the State Statistics Service (average population in January 2022). The % of the population from each region that went abroad does not include those Ukrainians who left or were forcibly taken to Russia or Belarus.

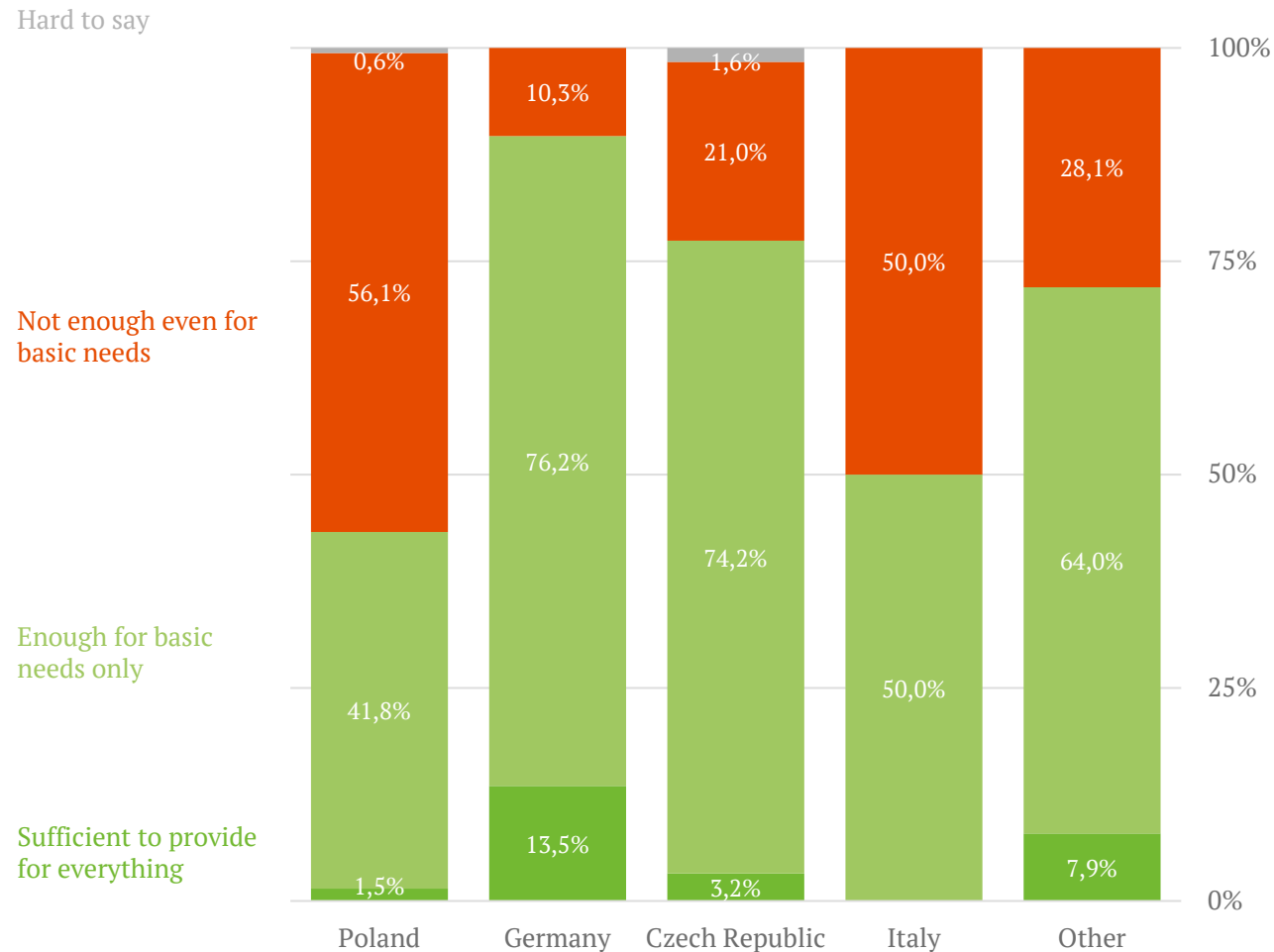
WHERE DO THEY LIVE AND IN WHAT CONDITIONS?

- Most Ukrainians have fled to Poland, followed by Germany, the Czech Republic and Italy
- Ukrainians have the right to live, work, receive healthcare and education in all EU countries, but other benefits and payments vary



Source: Info Sapiens poll commissioned by CES

WHERE DO THEY LIVE AND IN WHAT CONDITIONS?



Source: Info Sapiens poll commissioned by CES

- Germany provides the most benefits, such as social benefits and housing.
- The difference also lies in whether the benefits are unconditional: in Germany, you need to be registered at the job centre to receive benefits, while in Poland you need to have children.

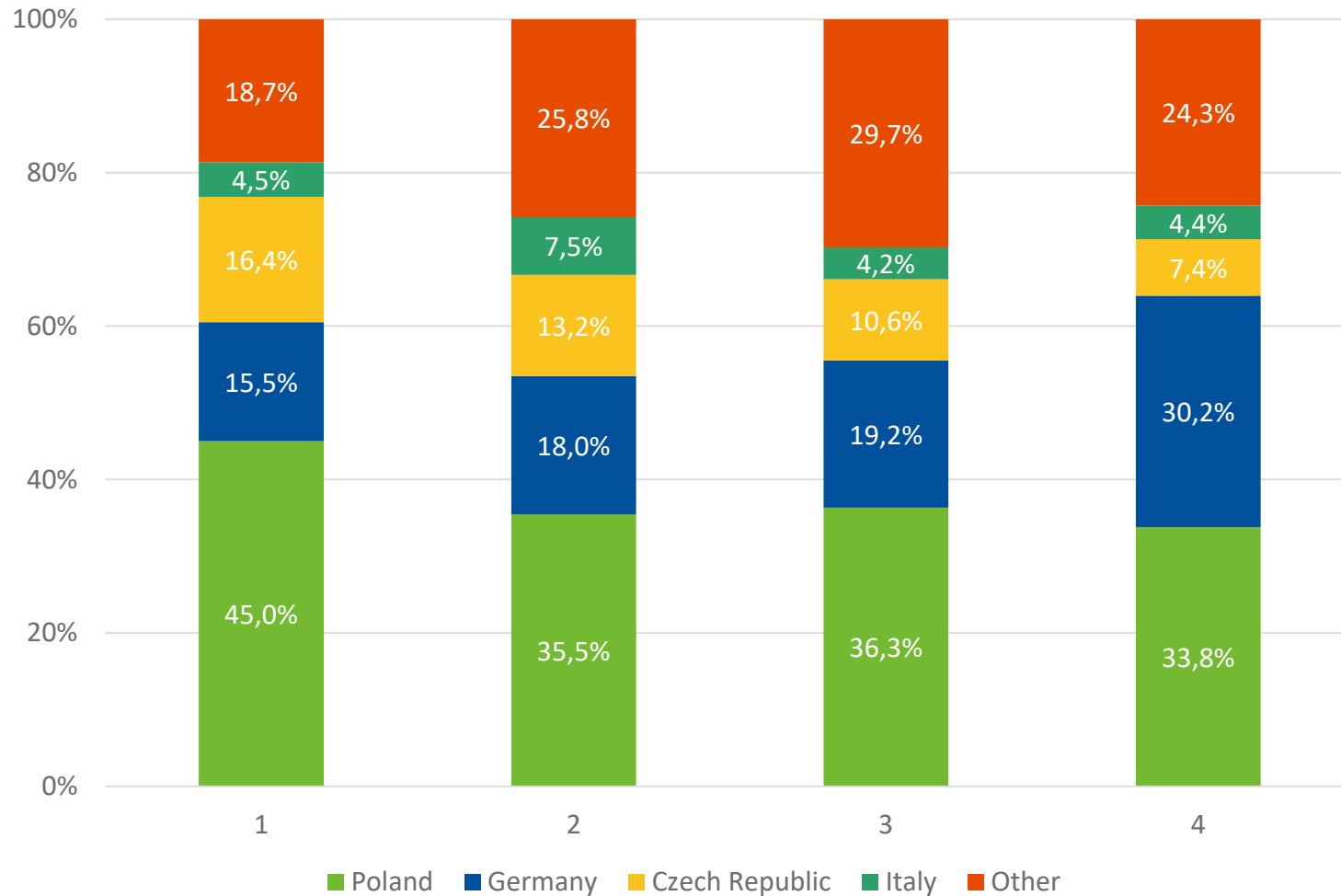
REFUGEE PROFILES

4 refugee groups

- In the previous slides you could see the average refugee, but there are different groups among them
- The results were obtained using cluster analysis, we identified the following 4 groups



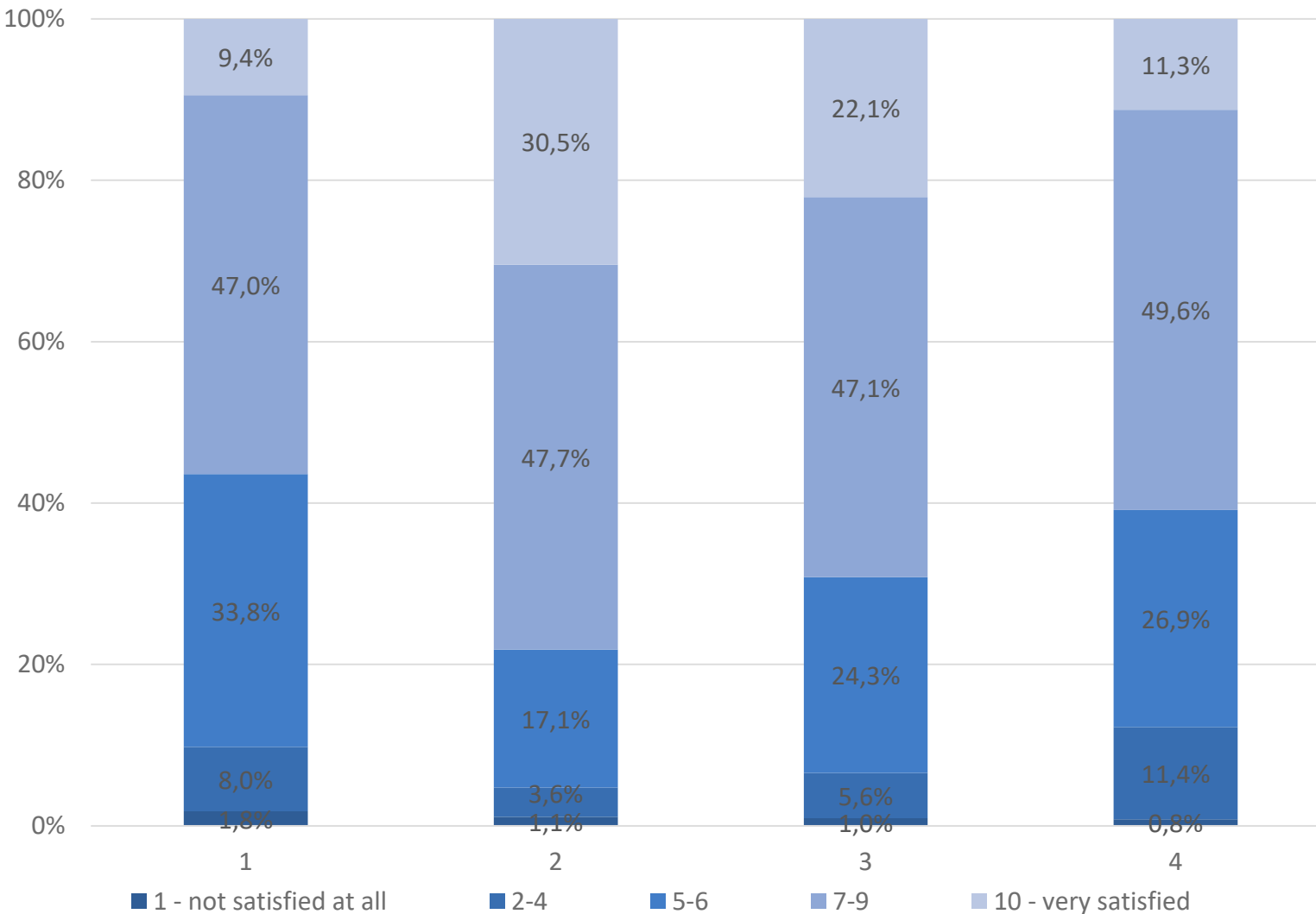
CLASSIC REFUGEES (25%):



- Middle-aged women with children,
- Mostly in Poland.
- Not very adapted to life abroad (do not have friends among locals, do not know the language, have not been abroad before, do not like the host country)
- Before the war, they lived mostly outside the combat zone, but in cities that were shelled - Central, Western Ukraine, Odesa region

Source: Info Sapiens poll commissioned by CES

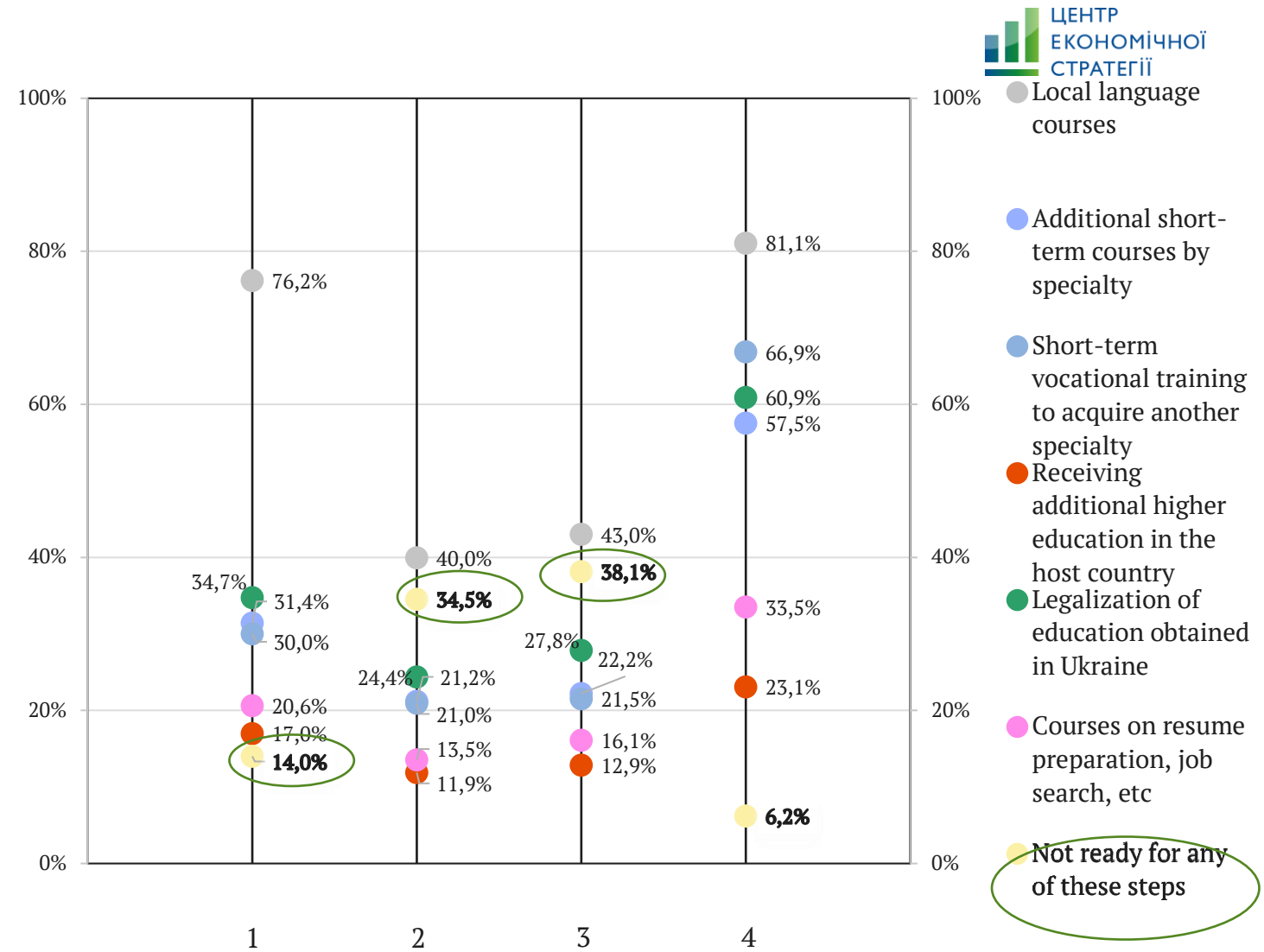
QUASI-LABOUR MIGRANTS (29%):



- Older women
- They left not only for security reasons, but also to find work
- They are more adapted to life abroad (most of them work in the host country, know the language, have family in the host country, are most satisfied with life abroad, and need less assistance)
- Their decision to return will not be affected by the end of war
- More likely to be from western Ukraine

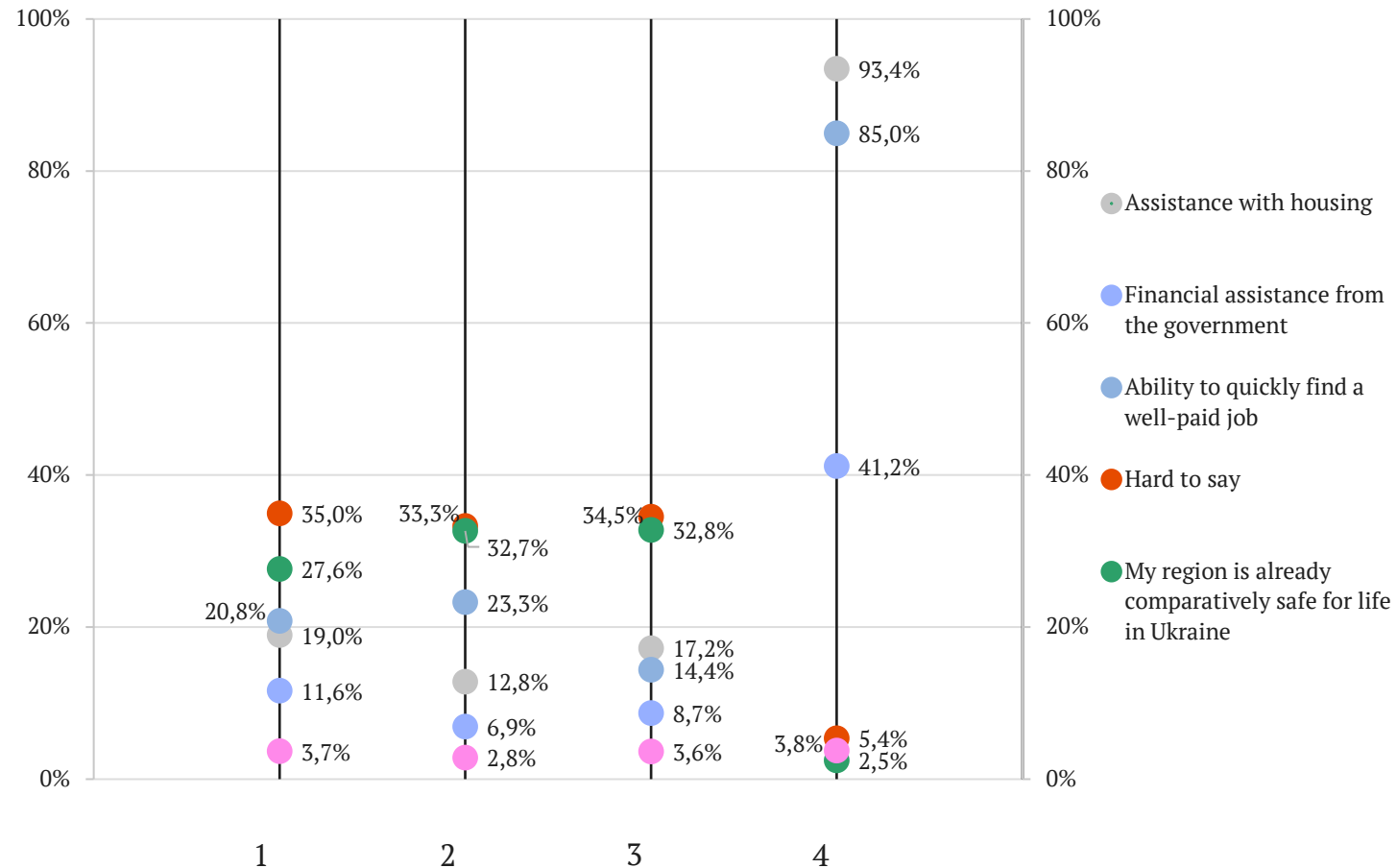
PROFESSIONALS (29%):

- More inclined to work in their pre-war occupation, not ready to work in a different field and not ready to take steps to retrain
- Relatively comfortable conditions of stay: they receive more assistance, have friends in the host country, and assess the attitude of locals more positively
- Somewhat more often than other groups they plan to return to Ukraine and are more definite about it
- They are more dispersed across Europe
- From the city of Kyiv, Kyiv, Kharkiv and Dnipropetrovsk regions



PEOPLE FROM THE COMBAT ZONE (16%)

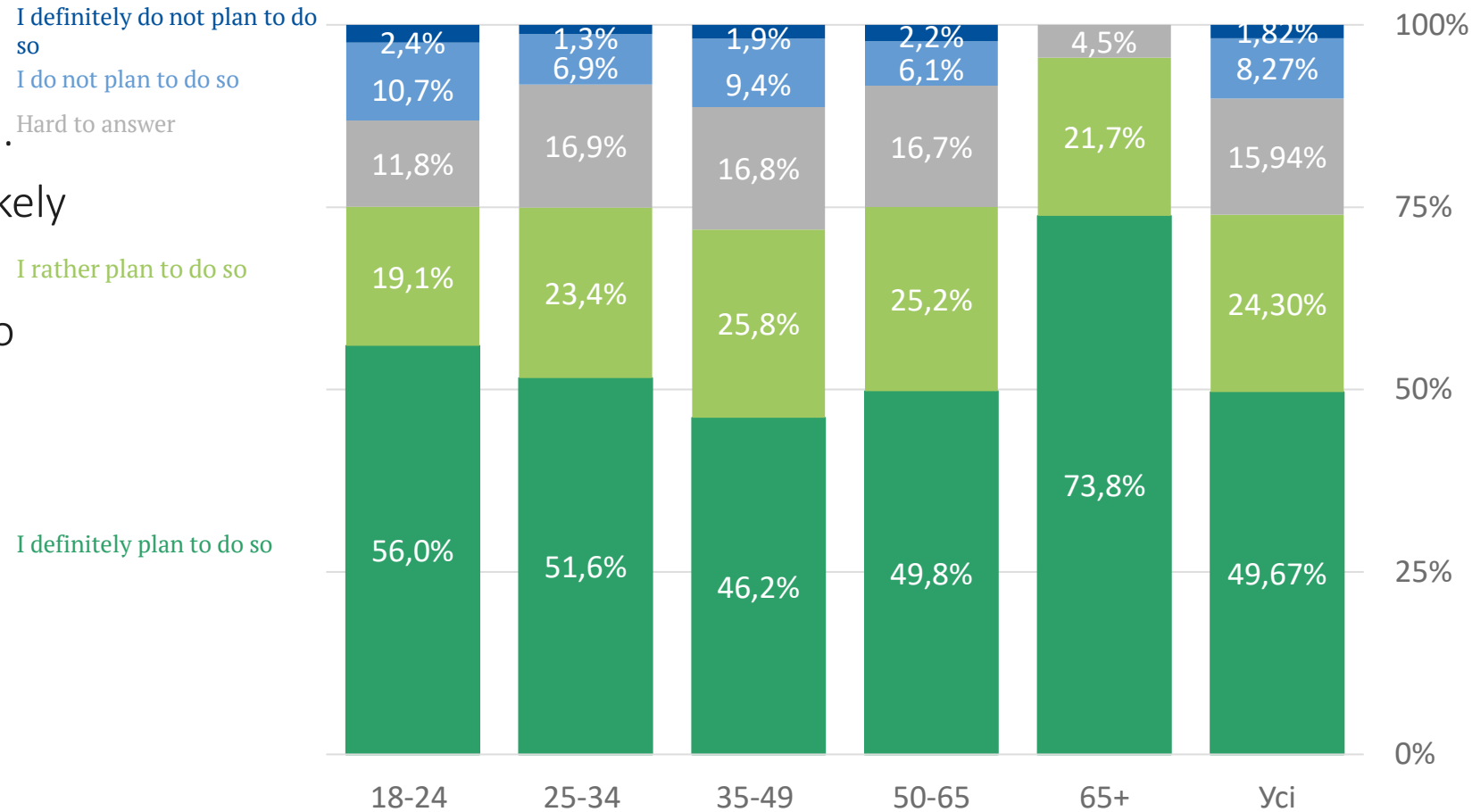
- They suffered the most losses due to the war.
- More likely to stay in Germany.
- Not adapted to life abroad, but ready to take steps to adapt (language learning, retraining courses, etc.).
- They like life in Ukraine much more than abroad.
- Ready to return to Ukraine, even if not to their own region, but not without conditions.
- More likely to be from Donetsk, Kharkiv, and Dnipropetrovsk regions.



Source: Info Sapiens poll commissioned by CES

DO YOU PLAN TO RETURN?

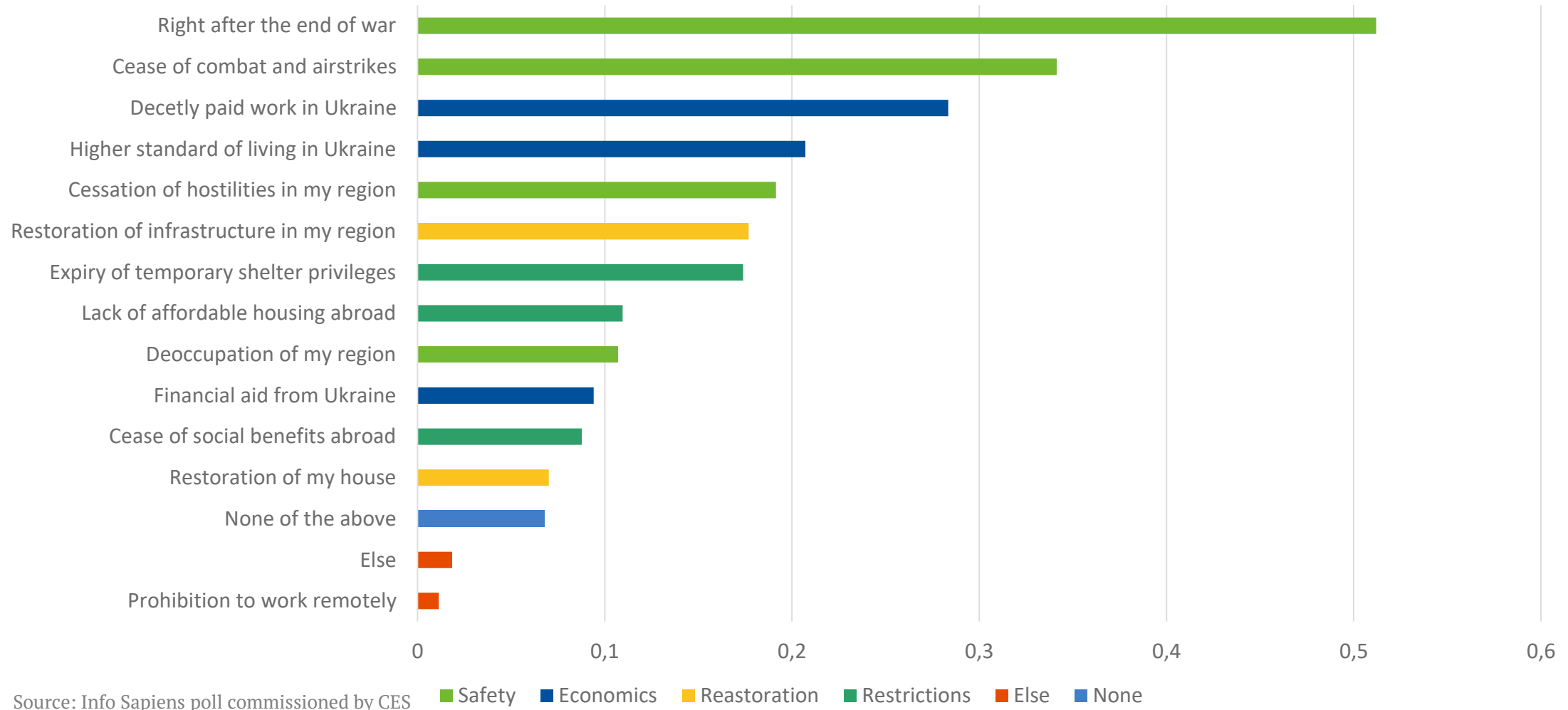
- Most Ukrainians are ready to return.
- Ukrainians aged 65+ are the most likely to return
- At the same time, some are ready to return only to visit family.



Source: Info Sapiens poll commissioned by CES

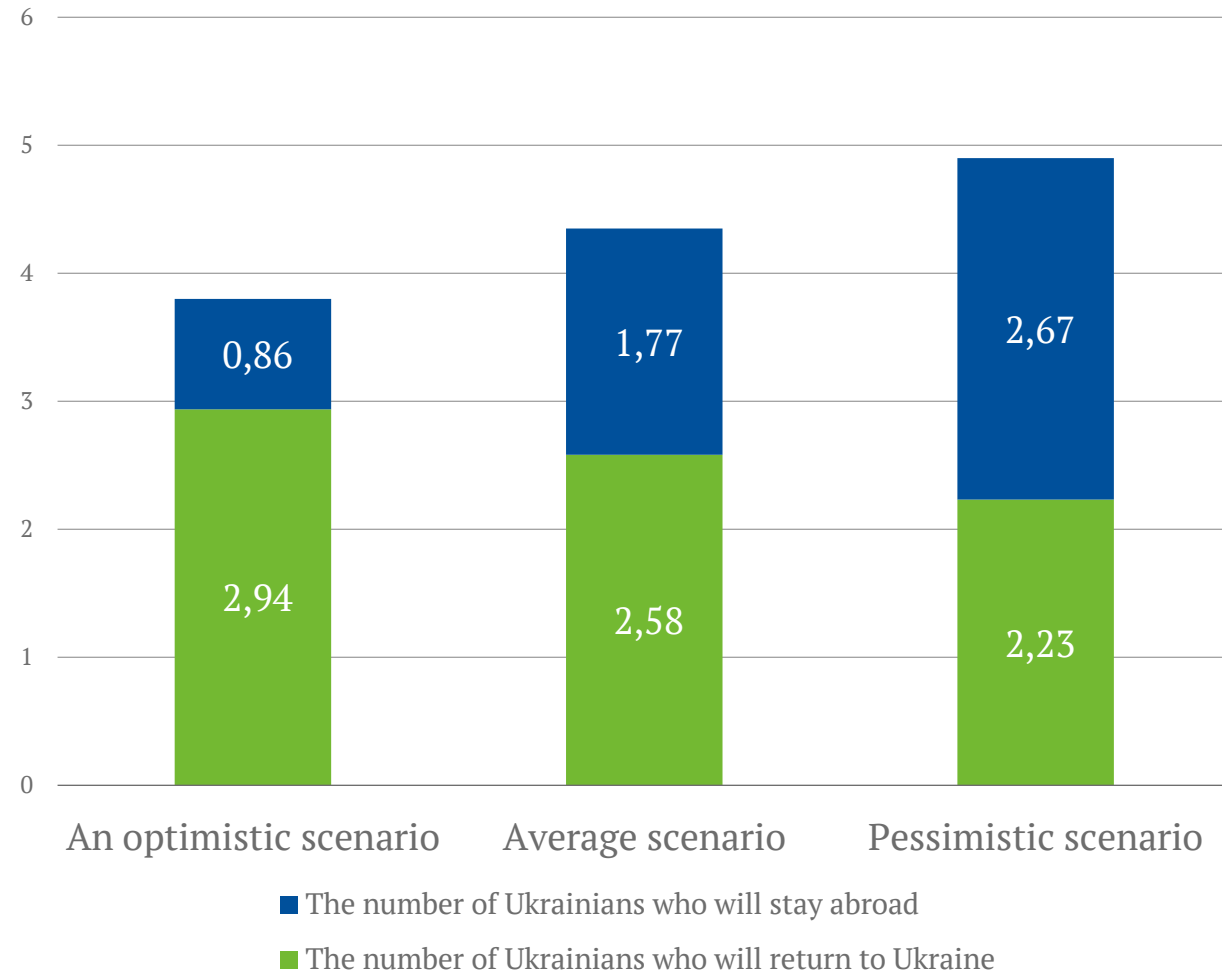
WHAT WILL ENCOURAGE UKRAINIANS TO RETURN?

- Security factors are the main ones, but jobs and a higher standard of living can also encourage a large number of Ukrainians to return.



HOW MANY UKRAINIANS WILL (NOT) RETURN?

- 46-76% of Ukrainians will return after the war
- Another 100-745 thousand Ukrainians may leave after the war
- Older people, those with lower levels of education and those who worked before the war are more likely to return
- Ukraine may lose 2.55% - 7.71% of GDP per year due to unreturned refugees



Source: CES calculations

RECOMMENDATIONS

- Cooperation with EU countries to help return Ukrainians after the war
- Rapid post-war reconstruction of the affected regions
- Providing assistance to people from the affected regions while reconstruction is underway
- Assistance in finding a job in a safer region, retraining courses
- Opening the EU labour market to Ukrainians after the war.