

# The recovery spending watchdog №23: Reconstruction of Ukraine

#23, November 2025

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# Key Findings

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- Barrier-free accessibility is becoming a priority in government policies: new standards aligned with international ones have been adopted.
- The government has allocated the State Fund for Regional Development sufficient resources to sustain 48 projects: they must be completed by the end of the year.
- Procurement regulations undergo amendment and clarification: approaches to procurement funded through the Ukraine Facility have been approved.
- In September 2025, the number of construction procurements increased compared to September of last year, but the total value of procurements was slightly lower than last year. The largest procurements in September include the protection of energy facilities, road maintenance in Mykolaiv Oblast, the construction of a border checkpoint with Moldova, and a school shelter.
- Due to shelling, the number of applications for compensation for damaged and destroyed housing is increasing. Despite ongoing destruction, medical and educational institutions are gradually being restored.

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- Legal regulation
- Recovery process and funding
- Local monitoring: key recovery component
- Analysis of recovery procurement
- Monitoring specific areas: housing, education, healthcare
- Three years of recovery monitoring: outtakes
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# Legal regulation



# Ukraine adopts international barrier-free standards

The new [DSTU ISO 21542:2025 standard “Buildings and structures. Accessibility and usability of the constructed environment”](#) sets out modern requirements for barrier-free spaces within buildings and structures — entrances, walkways, ramps, signage — which are mandatory starting from early stages of design. Thus, compliance with an international construction standard is reached. Therefore, designers will need to transition to the new rules, and manufacturers of relevant products, including doors, will also need to make changes to production.

The government [continues implementing barrier-free accessibility in construction](#): starting 30 October 2025, the [unified digital construction system](#) will require a checklist in design documentation and expert reports to verify the accessibility of facilities: built-in elements for people with reduced mobility, parents with strollers, and older adults. For project developers, experts, and regulatory bodies, this means that the design and permitting process is becoming stricter in terms of standards, and buildings will become more convenient for everyone. This checklist will be completed by architects, designers, and expert organizations. It will confirm that the project has been developed in compliance with building standards on inclusivity and barrier-free environments.



# Public-private partnership has the capacity to become a means of support for infrastructure projects

On 31 October, the EU-integration Law of Ukraine [“On Public-Private Partnership” \(No. 4510-IX\)](#) entered into force, introducing modern mechanisms for preparing and implementing infrastructure projects under PPP rules and regulating concessions.

The law will be an important tool for reconstruction and recovery, as the state lacks sufficient funds to finance large projects, while investments can come from private actors. It will also serve as a tool for attracting grant funding for reconstruction.

At the same time, PPPs are expected to enable the modernization of critical infrastructure (roads, bridges, hospitals, schools) as well as the reconstruction of social infrastructure.

The law also simplifies procedures for small projects and enables the implementation of projects at the local level.



# The government has established the rules for procurement funded through the EU's Ukraine Facility.

As Ukraine maintains the fulfilment of indicators set in the EU Ukraine Plan, the EU itself provides further support under the Ukraine Facility, there are certain markers that foresee investments in reconstruction, recovery, and construction in the domains of education, healthcare, and other sectors. On 29 September, the government finally adopted the [rules for public procurement](#) funded through this support means. This also concerns the purchase of equipment and furnishings for the respective institutions.

Such procurements will now be clearly labelled to distinguish them from others. This is important given that the indicators specify exact funding amounts for the respective programs.

Participants in the procurements and suppliers of goods, works, and services may only be companies and subcontractors registered in EU member states, Ukraine, the Western Balkans, Georgia, Moldova, the countries of the European Economic Area, and other states that provide Ukraine with support at the EU level.



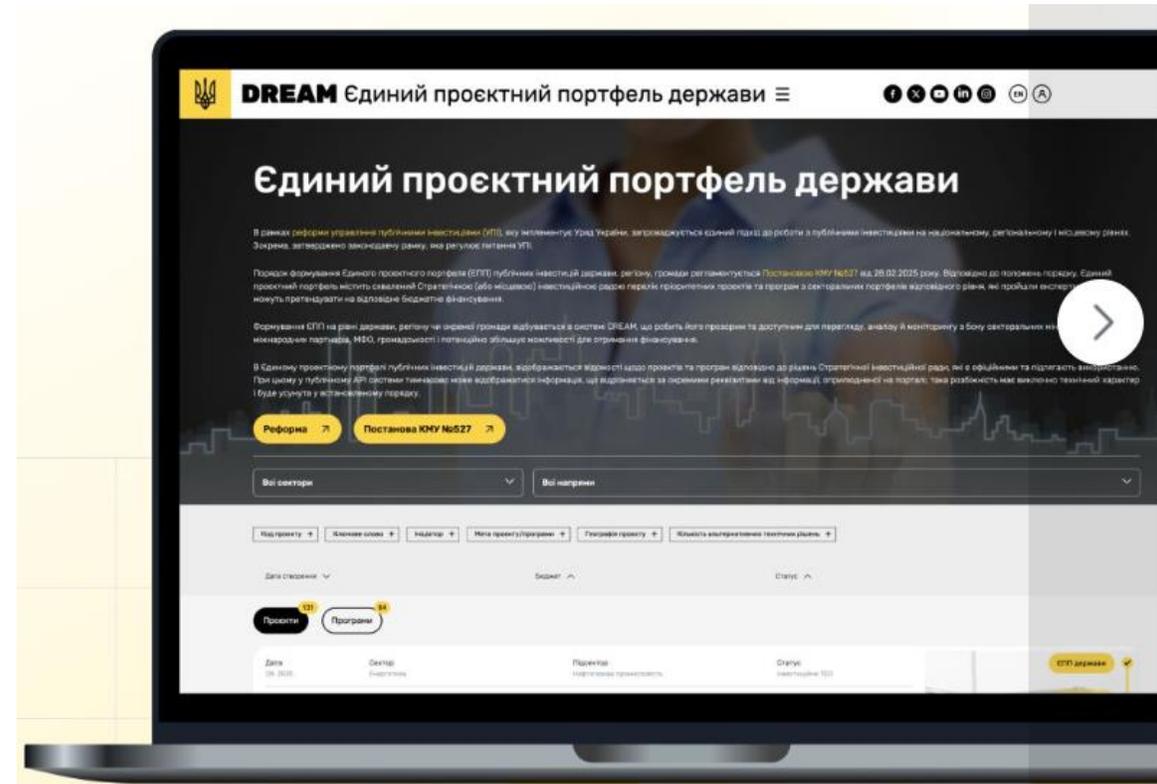
# The Unified Project Portfolio was increased by a UAH trillion

The Strategic Investment Council has amended the Unified Project Portfolio (UPP) to account for additional needs across sectors — 42 projects and 4 programs totaling UAH 1.1 trillion were added:

- Energy – 25 projects (UAH 660.06 billion)
- Transport – 11 projects (UAH 387.8 billion)
- Legal system – 1 project (UAH 0.4 billion)
- Municipal infrastructure – 2 projects and 2 programs (UAH 76.8 billion)
- Social Security – 3 projects (UAH 2.5 billion)
- Housing – 1 program (UAH 12.5 billion)
- Education and science – 1 program (UAH 6.0 billion)

The UPP now contains 131 projects and 64 public investment programs.

All municipalities must create their own UPPs by the end of the year.



# Recovery progress and funding

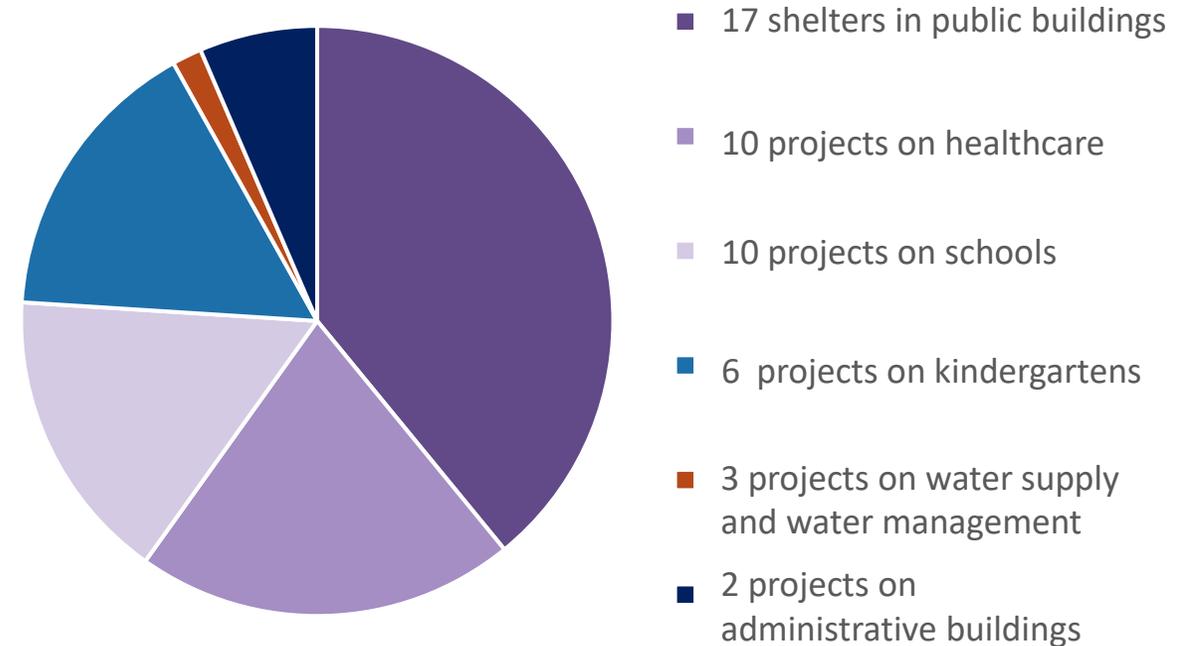


# Only two months left for the implementation of the SFRD-funded projects

The selection of projects financed from the State Fund for Regional Development (SFRD) ended on 29 September, but the [government made its decision](#) only a month later, at the end of October. As budget planning in Ukraine is annual, the funding will “expire” on 31 December, so implementers will have to hurry. This should not happen again.

- A total of [48 projects in 16 regions were selected](#), with combined funding of UAH 1 billion.
- Priority (in terms of funding) was given to frontline areas — 15 projects with funding of UAH 496 million; 12 projects worth UAH 277 million in the central macro-region; and 21 projects worth UAH 228 million in the western macro-region.
- The projects must be implemented by the end of the year; otherwise, the funding will have to be returned to the state budget. Therefore, the risk of not meeting the deadline is high, although it was partially mitigated by selecting projects that were already fully ready for implementation.

Distribution of projects financed by SFRD, UAH million



Source: Ministry of Development

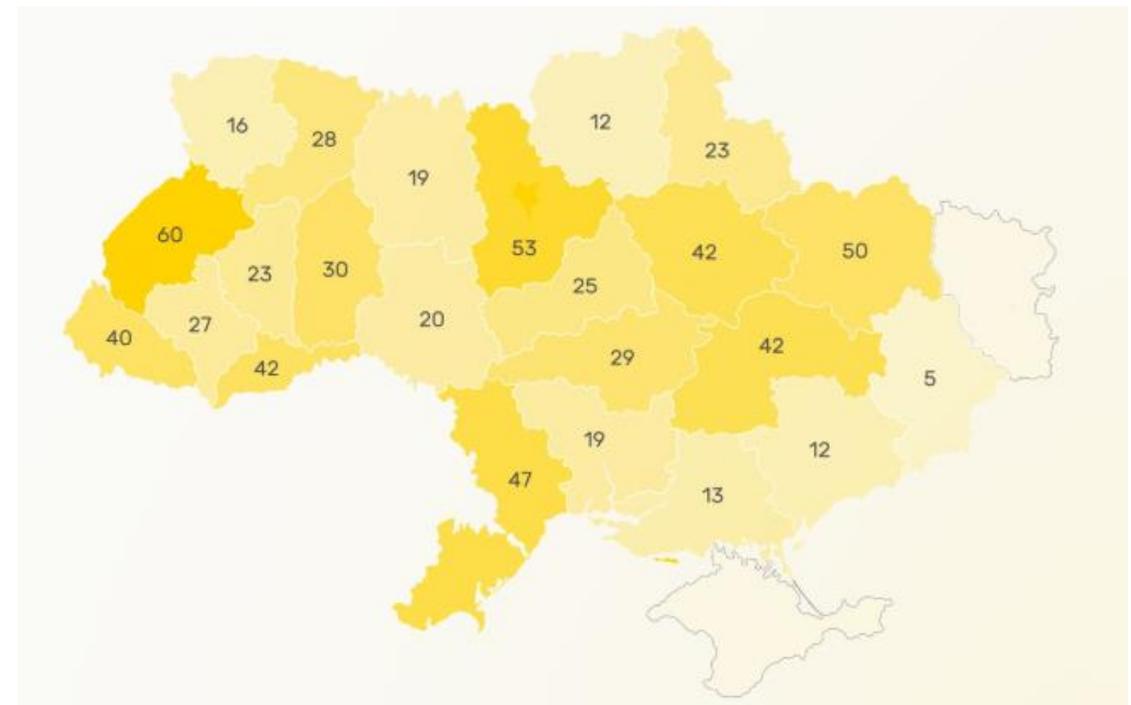
# Almost 700 applications were made for the EIB recovery programme, of which a third is from municipal networks

A total of 331 municipalities [submitted 677 applications](#) for funding under the “Ukraine Recovery Programme III,” financed by the European Investment Bank, amounting to UAH 24 billion:

- Heating, water supply, wastewater systems, and distributed generation networks — 223
- Shelters in preschool and healthcare institutions — 121
- Construction of medical facilities — 121
- Completion of schools and kindergartens with high construction readiness — 114
- Creating an accessible environment within the “Movement Without Barriers” project — 44
- Community shelters — 26
- Safety centers — 16
- Kitchen-factories for school meals — 8
- Construction of housing for IDPs — 4

Thus, the largest number of projects concerns municipal networks — heating, water supply, wastewater systems, and distributed generation networks. This may be due to the fact that tariffs for these services are lower than their cost, leaving no funds for investment.

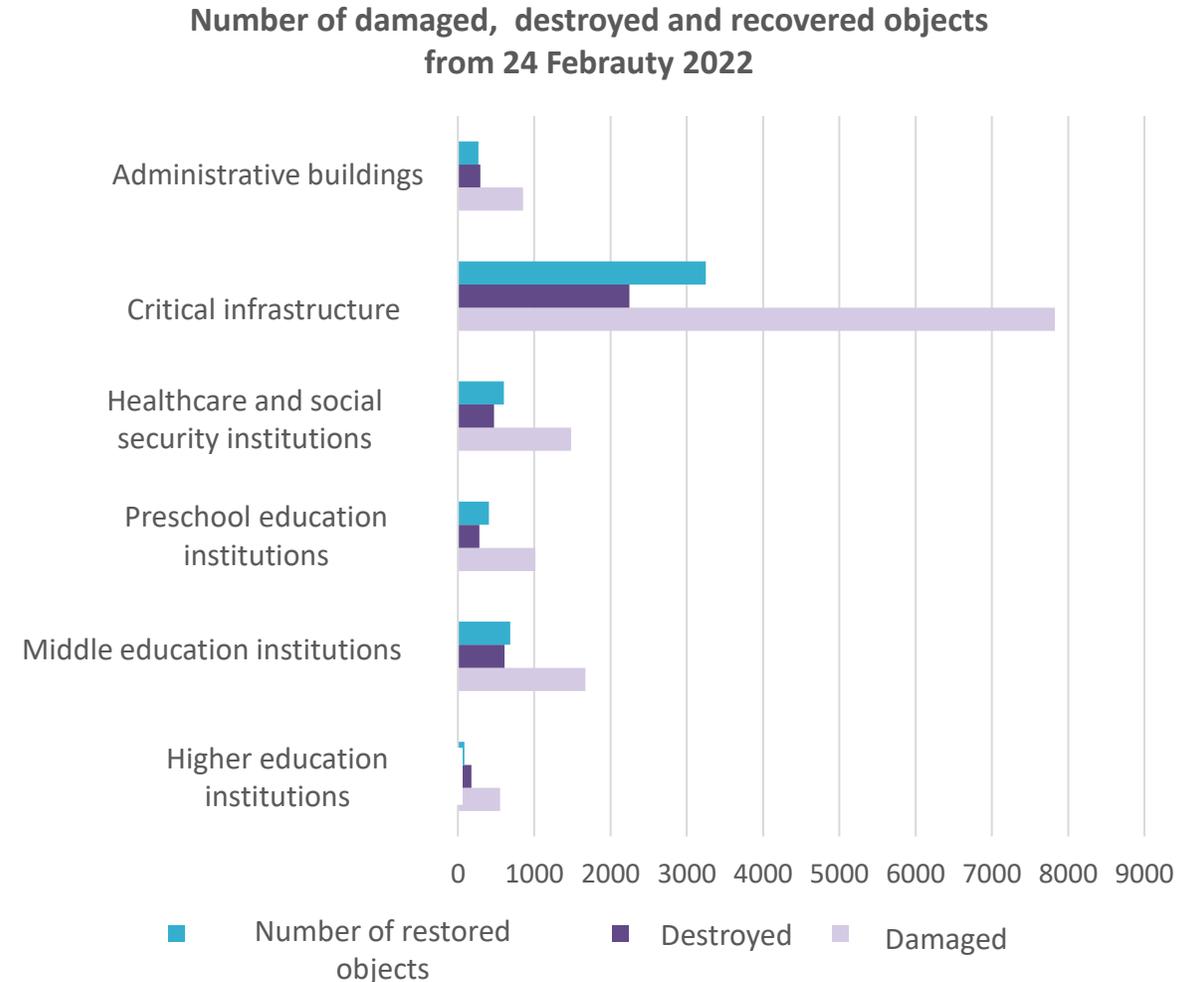
Regional application distribution



Source: DREAM

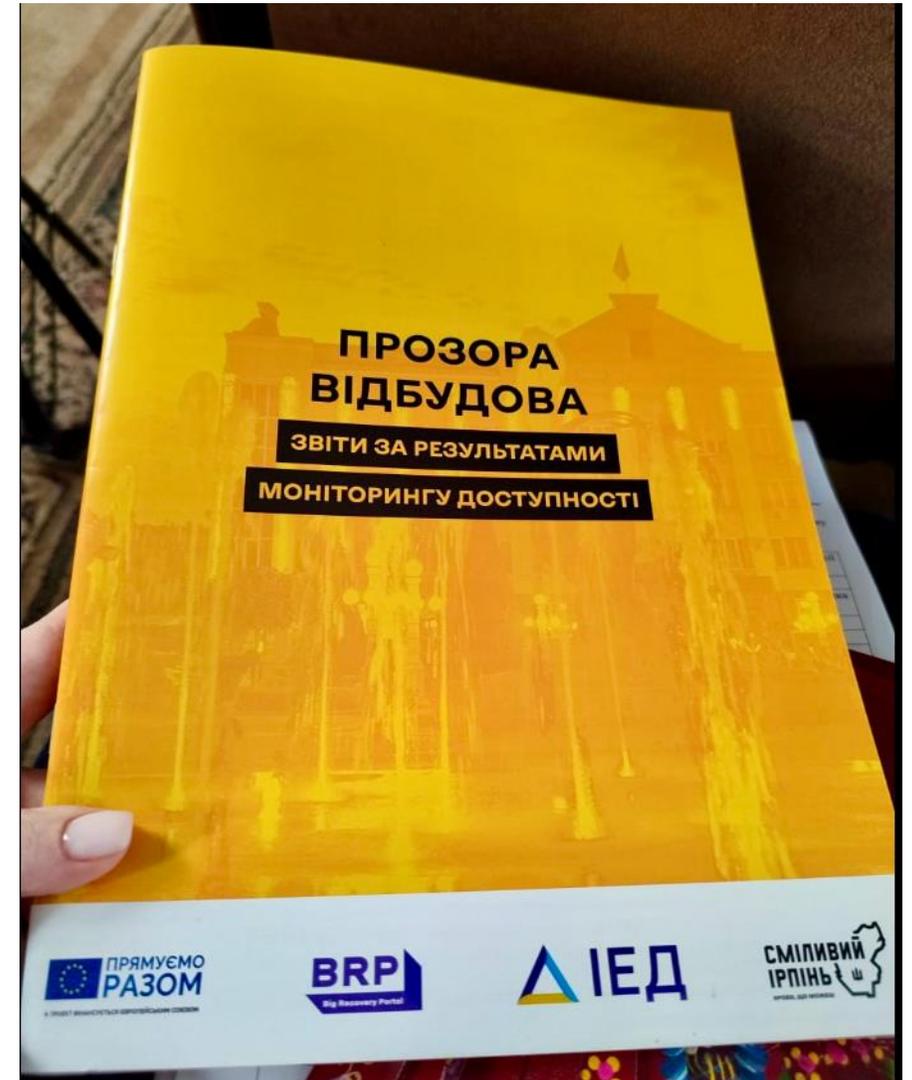
# The pace of restoration cannot keep up with the pace of destruction

- As of 24 October, more than 235,000 objects had been damaged or destroyed since the beginning of the full-scale war — 71,800 objects have been restored. In September and October, the pace of destruction again exceeded the pace of restoration.
- Housing in multi-apartment buildings and private houses is the leader in the number of damaged and destroyed objects (23,000 and 178,000, respectively). Their restoration rate is about 30%.
- The lowest restoration rate is observed in higher education institutions: partly due to the transition to online learning, and partly due to the relocation of institutions.
- Schools in frontline areas are not always being restored; instead, underground schools and learning spaces are being built, which is the best-fitting policy today.
- The government has [adopted a decision](#) on compensation to businesses for destroyed property (up to UAH 10 million in frontline areas) and war-risk insurance (up to UAH 1 million across Ukraine). Previously, businesses had to finance restoration on their own.



- Chosen categories
- Source: Ministry of Development, as of 24 October 2025

# Local monitoring: key recovery component



# “Reconstruction Monitoring” grant programme

Within the “Reconstruction Monitoring” grant programme, the IED provided 61 grants to 35 organizations during March 2024 – October 2025:

**Competition 1:** Monitoring of reconstruction and recovery at the local level: social infrastructure facilities — 41 grants;

**Competition 2:** Monitoring of reconstruction and recovery procurements at the local level: social infrastructure facilities — 20 grants;

Around 800 social infrastructure facilities were included in the monitoring: housing, educational institutions and their shelters, healthcare facilities, etc.

The monitoring activities were carried out using a unified methodology, and the results are presented on the [BRP](https://brp.org.ua) portal (questionnaires are still being uploaded).

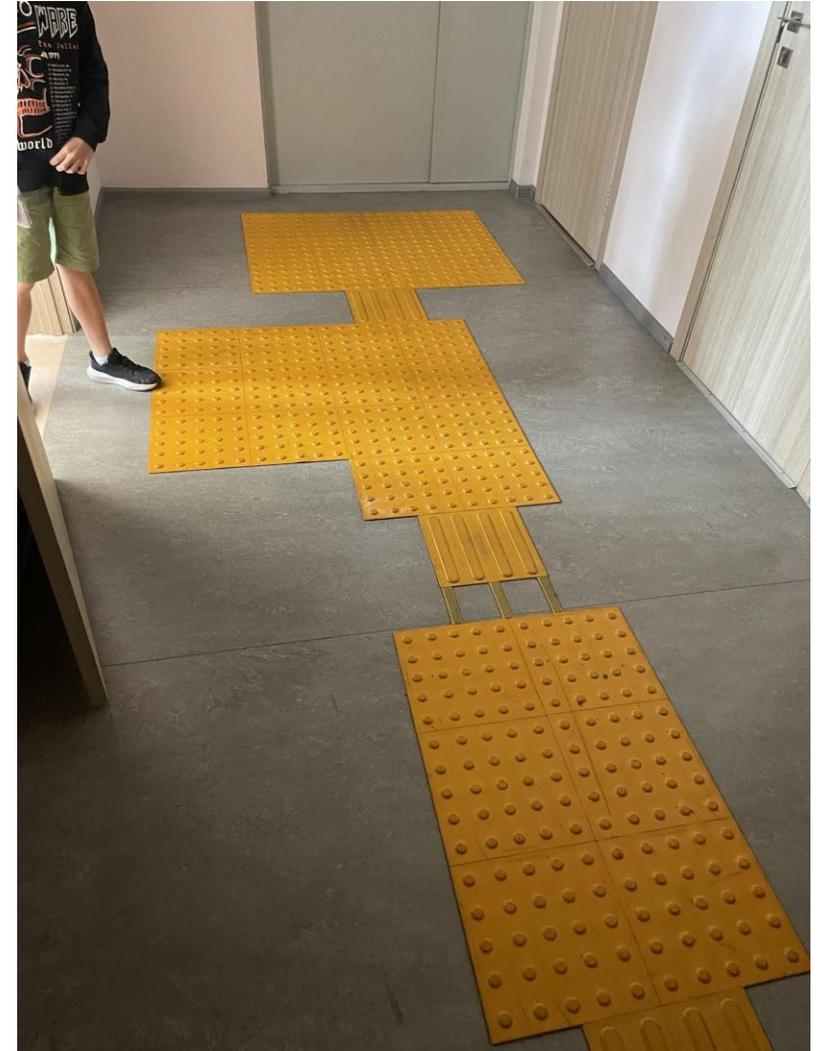


# Community engagement is low, the choice of projects is carried out subjectively

- **Public and community engagement in planning reconstruction and recovery in fact increased** at the beginning of 2025, when municipalities (often with support from donors and NGOs) began developing reconstruction and recovery plans and programs (which now, it appears, are no longer needed).
- Residents of multi-apartment buildings often do not have sufficient information about the reconstruction of their housing, nor are their preferences asked.
- Contracting authorities, including donors, do not always involve communities and end users (in particular, parents of schoolchildren) in discussions about the reconstruction and recovery of facilities.
- **Project prioritization was most often carried out by authorities without discussion** with the community's population and without appropriate methodologies.
- “Reconstruction and recovery,” for example, using funds from the Armed Aggression Consequences Elimination Fund, sometimes take place according to project designs prepared as far back as 2021.
- 25% of projects were not completed within the initially planned deadlines, and the same share of projects underwent a revision of the initial cost.
- After audits by the State Audit Service, project costs are often reduced due to revised estimates.

# Barrier-free approach is being implemented, but mostly inconsistently

- **Most of the monitored facilities do not comply with accessibility standards.**
- Often this is a matter of “we didn’t think about it,” or “why would we need that?”
- Sometimes people say, “we don’t have such children here and maybe never will,” although accessibility also concerns persons with disabilities who may work in the relevant institutions, be parents of schoolchildren, or be patients in healthcare facilities.
- Engineers and designers sometimes say: “Let them switch to wheelchairs with larger wheels.”
- Sometimes the result follows the principle of “we meant for the best, but it turned out to be as usual,” when accessibility is implemented according to what people think it should be, rather than according to actual standards.
- Therefore, the steps taken by the Ministry for Communities, Territories and Infrastructure Development to promote accessibility through numerous clarifications and educational webinars are beneficial.



# Barrier-free approach is done differently



Accessibility was omitted here... but this is the entrance to a shelter — children may fall if they move quickly.



Sometimes lifts like these are commissioned if no other option is available.

# Accessibility and respect are now always taken into account during reconstruction



# Accessibility — implementation varies; there are successful cases



# Shelters may include engaging design, motivating children to explore and not to fear

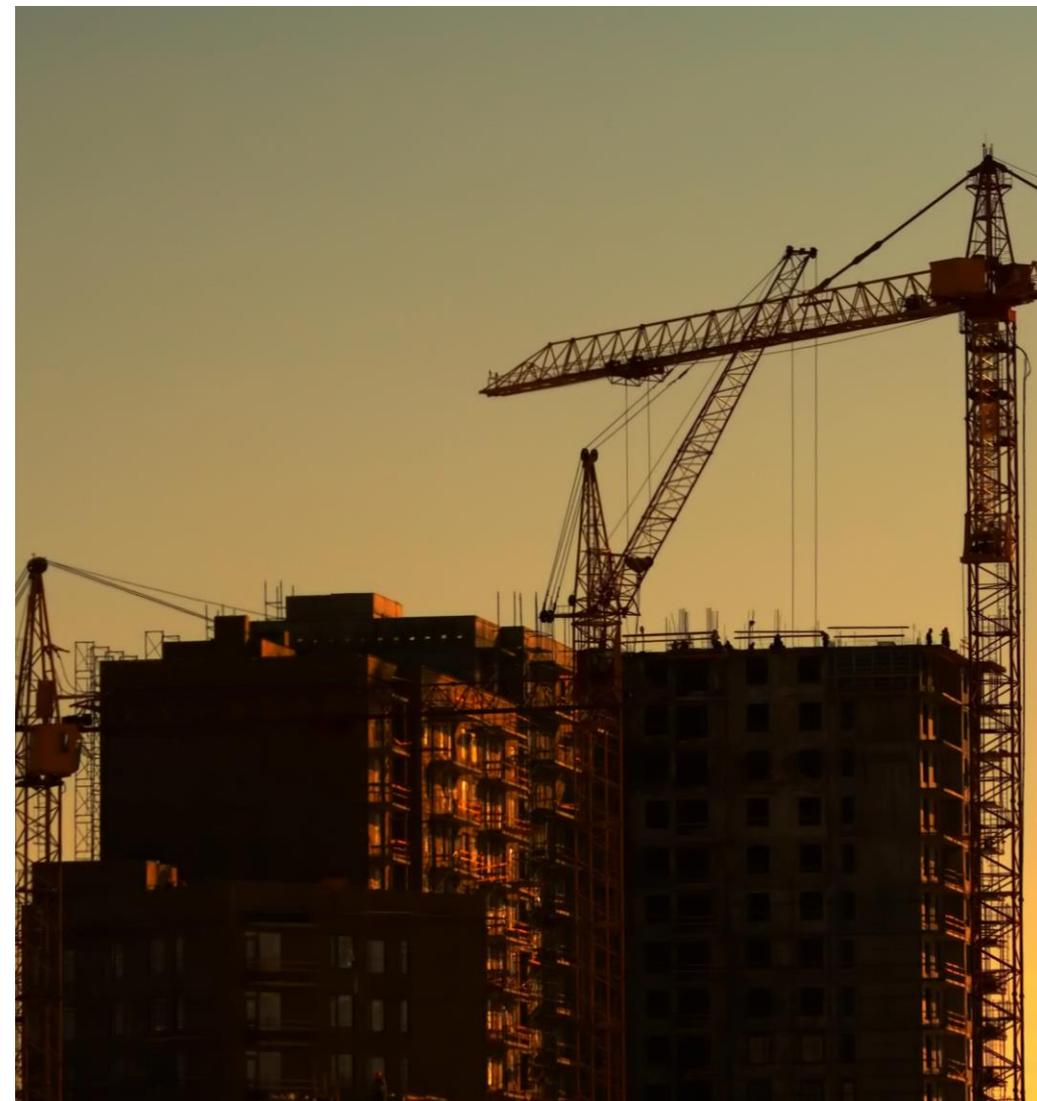


# In conclusion...

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- Accessibility remains a promise and a nice slogan:
  - At the same time, accessibility is critically important for the integration of veterans and civilians with disabilities into society as a whole and the labor market in particular;
  - Often, this is a problem of lack of knowledge or lack of thoughtful solutions;
  - A change in approaches and mindset toward accessibility is needed from all parties involved in reconstruction and recovery.
- Even if a facility has accessibility features, getting there remains an extremely difficult issue.
- Energy efficiency issues are often postponed “for later” because they are expensive.
- Environmental aspects of reconstruction still need to be thoroughly discussed.
  - Simplified procurement procedures for construction works have led to higher risks in their implementation: When monitoring procurements for already completed reconstruction projects, it must be taken into account that procurement legislation has changed many times.
- Procurement officers most often use price as the sole criterion for selecting contractors/projects.

# Reconstruction procurements as of October 2025\*

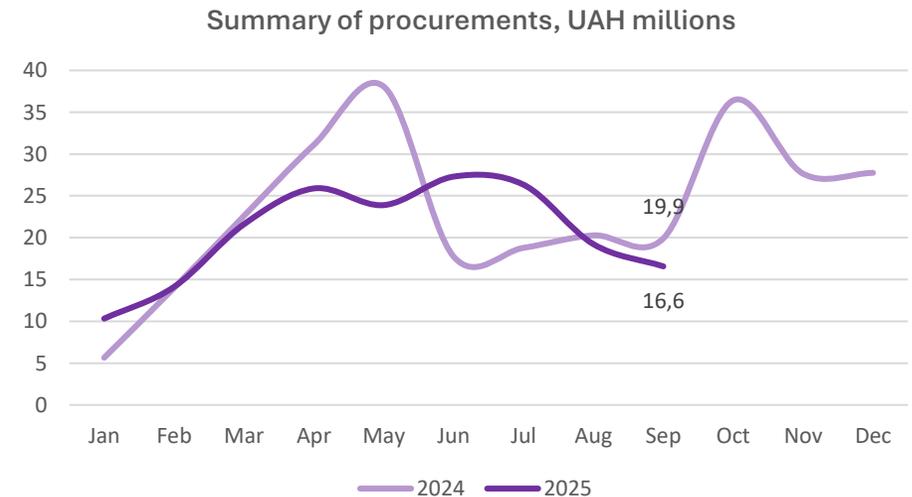
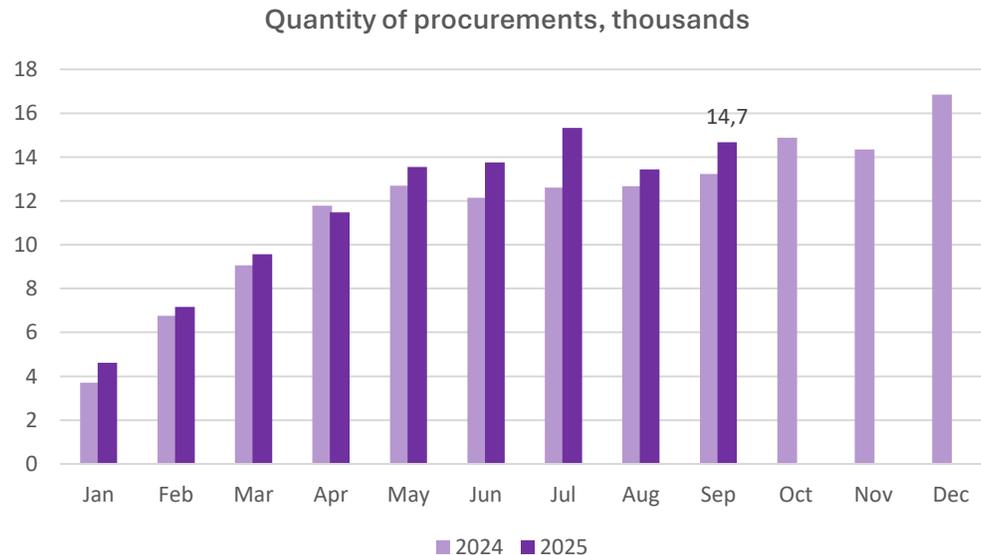


\*оперативні дані станом на 10.10.2025, можуть бути уточнені

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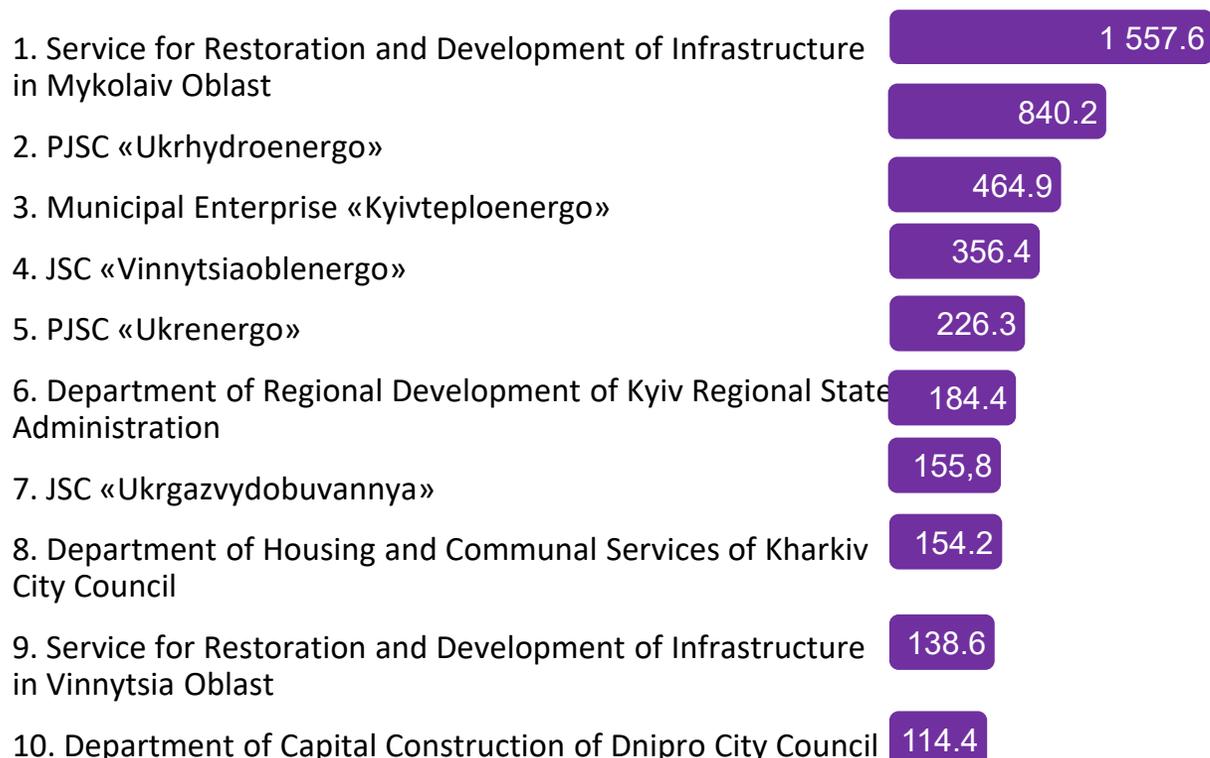
# In 2025 the number of construction procurements\* steadily grows in comparison with the previous year

- The vast majority of procurements announced in September 2025 are already completed — 11.9 thousand of them (81%). Another 14% are still ongoing, 4% did not take place, and 1% were cancelled.
- The largest completed procurement of September 2025 is the project for maintenance of highways in Mykolaiv oblast, amounting to 1.6 billion UAH. The works are performed by LLC “Rosdorstroj”.
- The largest procuring entity in September 2025 was the Service for Restoration and Development of Infrastructure in Mykolaiv oblast, which is the customer in the above-mentioned project. PJSC “Ukrenergo” was the second-largest procuring entity with a total of 840.2 million UAH, in particular for reconstruction, protection, and preparation of energy facilities for the heating season.



# Both the procuring entity and the contractor in infrastructure projects took first place in construction procurements\* in September.

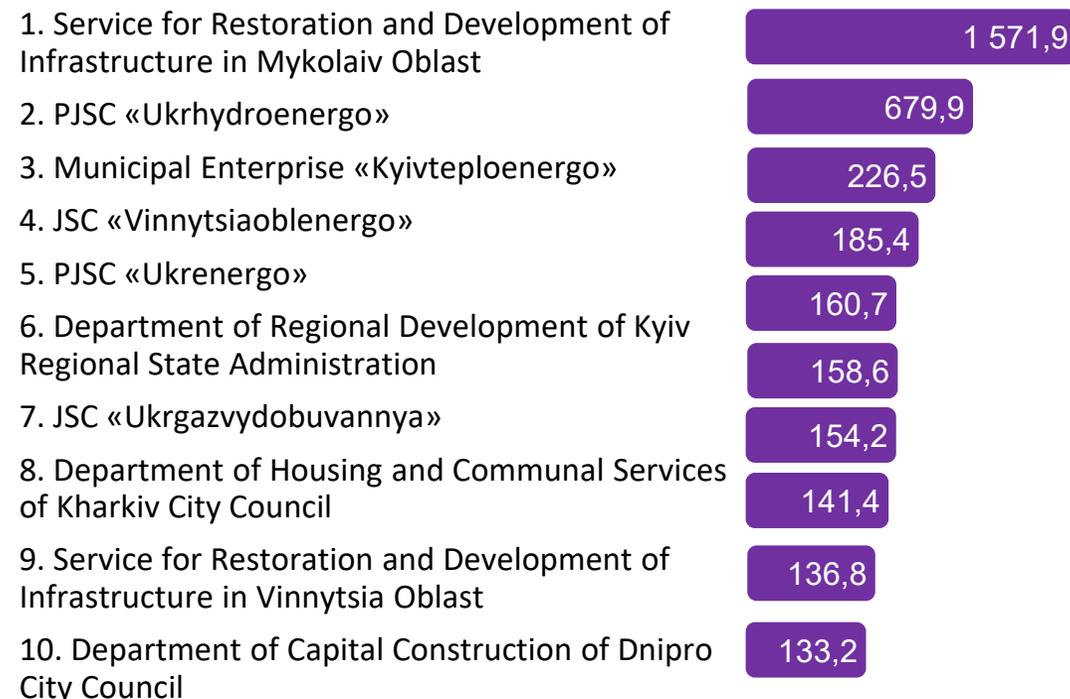
## Top 10 organizers (UAH million)



The share of the top 10 in all procurements

42%

## Top 10 winners (UAH million)



The share of the top 10 in all procurements

35%

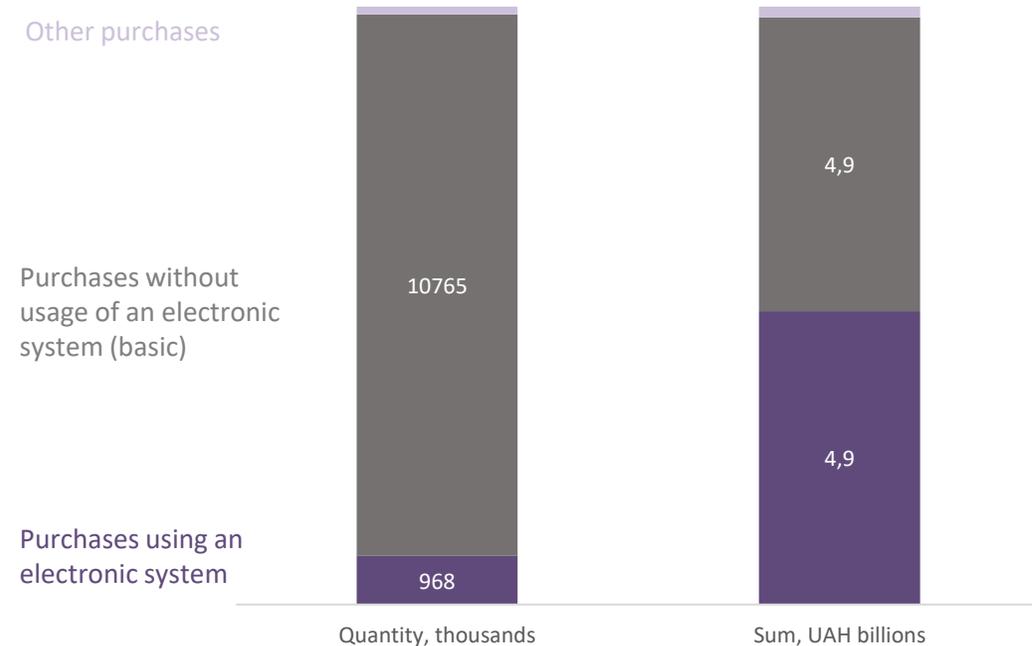
# Some of the largest construction procurements\* in September were in the energy sector.

№ Procurement	Organizer	Winner	Procurement cost, UAH million
1. Road maintenance in Mykolaiv oblast	Service for Restoration and Development of Infrastructure in Mykolaiv Oblast	«Rosdorstroï» LLC	1 558
2. Protective structure for the Dnistrovska Pumped Storage Power Plant	PJSC «Ukrhydroenergo»	PE «Elitbud-1»	672
3. Capital repair of the substation of JSC «Vinnytsiaoblenergo»	JSC «Vinnytsiaoblenergo»	PE «Eifel»	225
4. Reconstruction of a substation with the installation of additional transformer protection	PSC «Ukrenergo»	«Topaz» LLC	185
5. Construction of an anti-radiation shelter facility on the territory of Ivankiv Lyceum No. 1, Kyiv Oblast	Department of Regional Development of Kyiv Regional State Administration	«Budivelna industriia «Countryinvestbud»» LLC	160
6. Construction of the new «Bronnytsia–Ungur» checkpoint across the state border for automobile traffic	Service for Restoration and Development of Infrastructure in Vinnytsia Oblast	«Sab Enterprise» LLC	154
7. Reconstruction of a substation with the installation of additional transformer protection	PJSC «Ukrenergo»	«Ukrteploenergoremont» LLC	142

# A significant portion of construction procurements\* takes place outside the electronic system.

The majority of procurements in August 2025 took place outside of the electronic system

Electronic system usage in September 2025



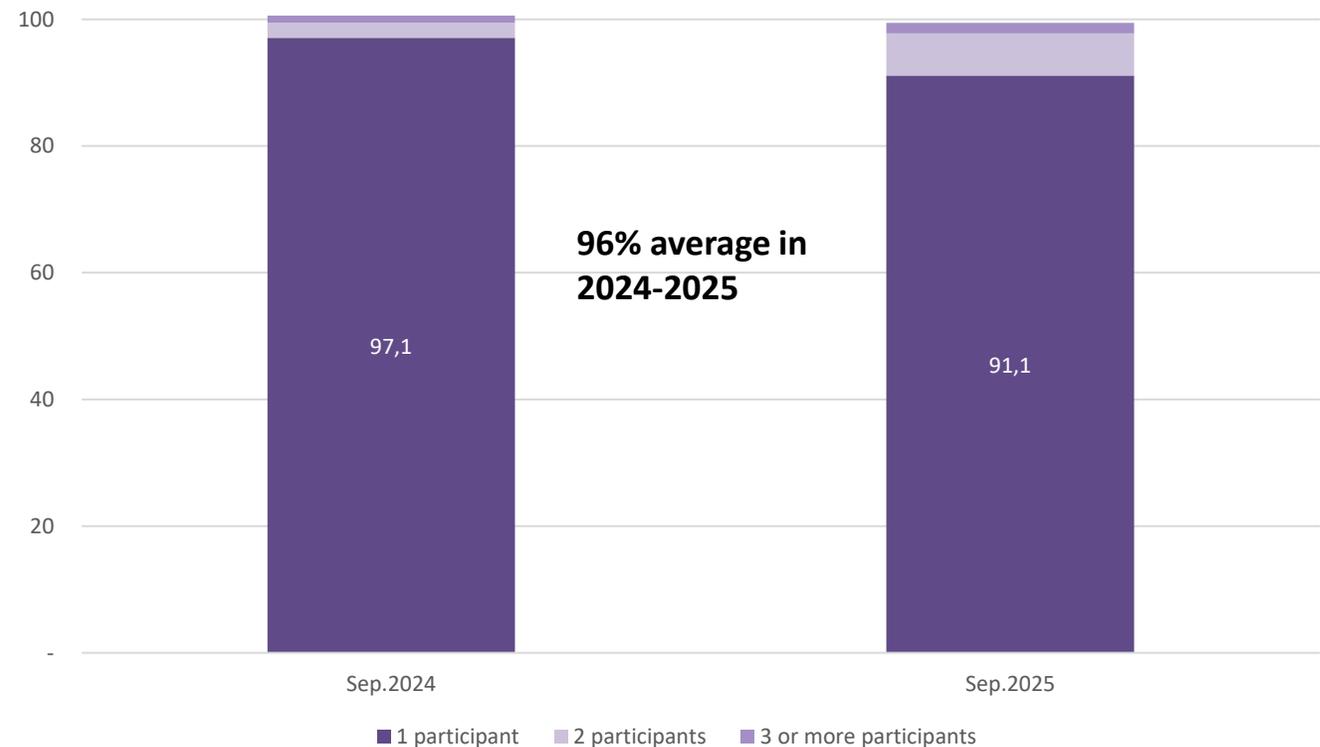
- \*The electronic system was used for only 968 completed procurements (8% of all completed procurements), amounting to UAH 4.9 billion UAH (49% of all procurements by value) in September 2025.
- In September 2025, procurements without the use of the electronic system (basic) accounted for almost half of all procurements by value.

Source: [Bi Prozorro](#).

# Procurements\* with a single participant prevail

- In September 2025, a high proportion of procurements with a single participant was maintained (97% of all procurements by volume, accounting for 91% of the total procurement value) using the electronic system (details in Appendix 1).
- For the period of January – September 2025, the share of procurements with a single participant amounted to 95% of the total volume of procurements, accounting for 70% of the total procurement value (details in Appendix 1).
- In September, there was 1 procurement with 7 participants (the value of the procurement decreased by 45% compared to the expected value) and 5 procurements with 4 participants (the value of procurements decreased by an average of 33% from the expected value).

## The share of procurements with only one participant remains significant in September



# In procurements\* with the highest number of participants, the price significantly decreased

No	Procurement	Organizer	Winner	Cost, million UAH (expected/actual)	Participants
<b>All procurements</b>					
1.	Electrical installation works in the storage facility of the wastewater treatment plants of the Mykolaivvodokanal MCE.	MCE «Mykolaivvodokanal»	Individual Entrepreneur Sorochan Serhii Viktorovich	0.09 / 0.05 (-45%)	7
2.	Electrical installation works in the premises of CE «Himnasiia «Suchasnyk» CSC	Education authority of the Kropyvnytskyi city council	«Tekhnohenna bezpeka» LLC	1.4 / 0.9 (-65%)	4
3.	Electrical installation works in the premises of CE «Velykobalkivska himnasiia Kropyvnytskoi miskoi rady»	Education authority of the Kropyvnytskyi city council	«Pozhezhna bezpeka-centr» LLC	0.9 / 0.5 (-40%)	4
<b>Procurements totalling more than UAH 20 million</b>					
1.	Construction of an anti-radiation shelter facility on the territory of Ivankiv Lyceum №1, Kyiv Oblast.	Pryluky Lyceum №9 of the Pryluky city council of Chernihiv oblast	ПЕ «MPBP Stimul»	34.5 / 31.1 (-11%)	3
6.	Construction of the new «Bronnytsia–Ungur» checkpoint across the state border for automobile traffic	Service for Restoration and Development of Infrastructure in Vinnytsia Oblast	«Sab Enterprise» LLC	162.7 / 154.2 (-5%)	2
3.	Capital repair of the protection facility for the CE «Chemuzhivskyi licey», Kharkiv oblast	Education department of the Zmiiv city council of the Chuhuiv district of the Kharkiv oblast	TOB «Naukovo-vyrobnycha kompaniia «Skhidbud»	25.3 / 25.1 (-1%)	2

# Monitoring of specific areas

Housing

Healthcare

Education



# As a result of shelling, the number of applications for compensation for damaged and destroyed housing is increasing

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As of October 10, compensation was received by 140 thousand families, totaling 48 billion UAH:

- Compensation for damaged housing was received by 114 thousand families, amounting to 11 billion UAH (as of September 1, the figures were 108 thousand and 10.5 billion UAH, respectively).
- The share of paid applications was 66%. Housing certificates for the purchase of housing were received by 25 thousand families, whose homes were destroyed, totaling 36 billion UAH (as of September 1, the figures were 23 thousand families and 33 billion UAH, respectively).
- Monetary compensation for construction was received by 680 families, amounting to 825 million UAH.

Overall, the program continues to be financed by international partners' funds, primarily through the World Bank's HOPE program.

The Government continues to develop mechanisms for issuing certificates for IDPs from temporarily occupied territories. Currently, they are already being issued to IDPs with the status of a combatant or those with a war-related disability.

# 46% of the damaged medical facilities were recovered

As of November 4, 2025, 1,714 healthcare facilities have been damaged, and another 227 have been destroyed. The largest losses were incurred in the Kharkiv, Donetsk, Mykolaiv, Kyiv, Chernihiv, Dnipropetrovsk, Kherson, and Zaporizhzhia Oblasts.

556 facilities have already been fully restored, and another 348 have been partially restored (a total of 46% of the damage).

[As of October 9, 2025, the capital repair of the diagnostic and treatment complex of Okhmatdyt is ongoing:](#) the facade is being renovated and installed, new windows are being fitted, the lighting system is being upgraded, internal works are being carried out, and engineering networks are being modernized.

[In the Kyiv Oblast, an ambulatory clinic damaged by hostilities has been restored.](#) The facility opened its doors on September 5, 2025, for 2,500 residents of the community.

[The DREAM platform already contains 1,158 healthcare projects](#) that are currently being implemented—new construction and capital repair.

[During September 2025: 166 projects were added with a total budget of 34.26 billion UAH](#) (with financial coverage of only 0.6%). The largest number of projects were in the Chernivtsi (19), Odesa (17), and Cherkasy (15) Oblasts.



## ...as well as 28% of the education institutions

As of 24 October 2025, the following have been damaged or destroyed:

- 729 higher education institutions,
- 2,184 general secondary education institutions (schools),
- 1,298 preschool education institutions.

During this period, across various regions of Ukraine, 84 higher education institutions, 687 general secondary schools, and 406 preschools have been fully restored and transferred to the balance of local authorities (a total of 28% of damaged facilities).

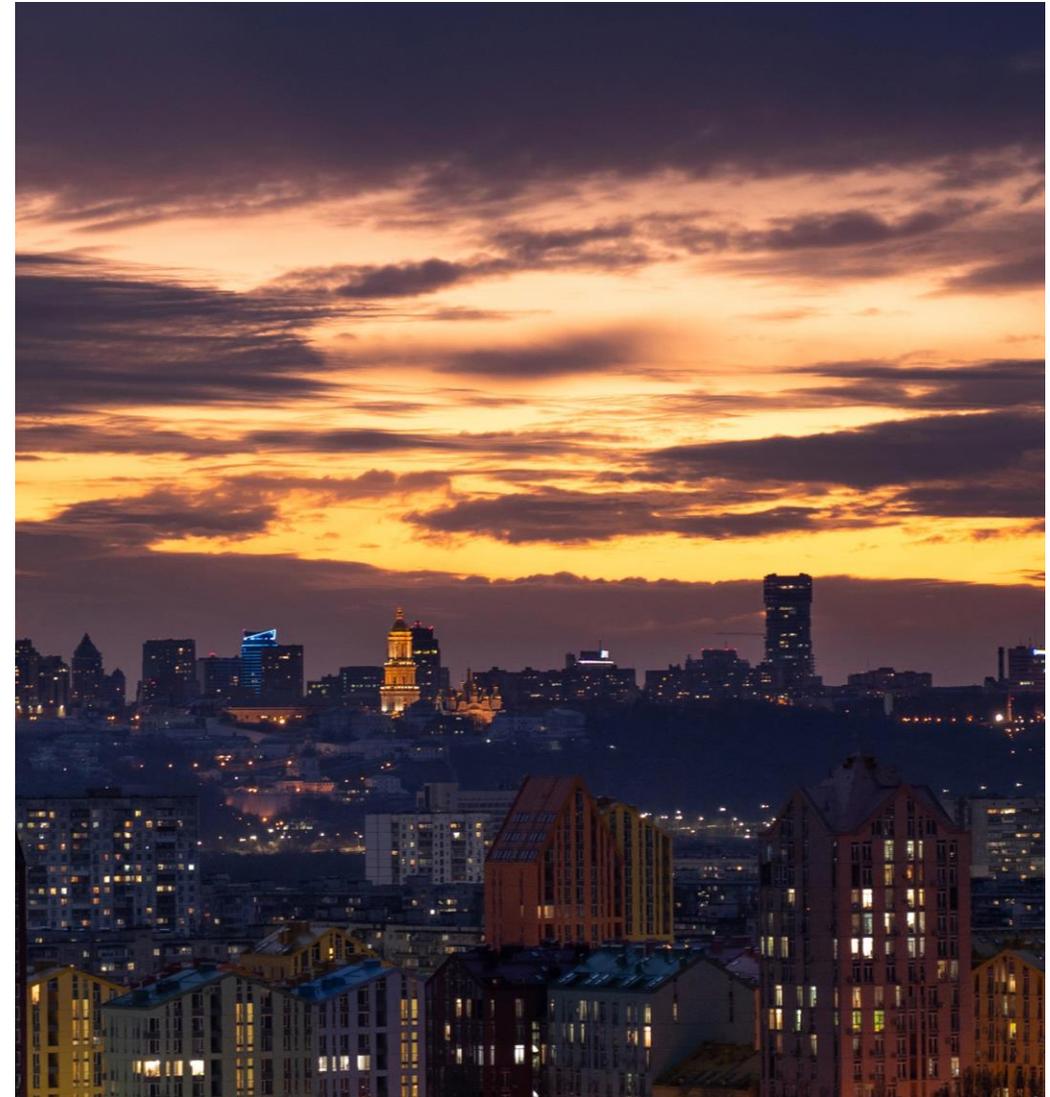
[In Zaporizhzhia, repair works continue](#) at a school damaged as a result of the war. The restoration is being carried out under a European Investment Bank program. The school is planned to reopen in the 2026/2027 academic year.

There are already [3,151 education facilities on the DREAM platform](#) that are under implementation — new construction and major renovation.

During September 2025, 258 projects were added in the education sector with a total budget of UAH 5.5 billion (financial coverage — 14.8%). The largest number of projects is in Odesa Oblast (28) and Rivne Oblast (23).



# Three years of recovery monitoring: outtakes



# Key points

In 2023–2024, the volume of construction procurements amounted to about UAH 300 billion (~ \$7–8 billion) annually, or ~4% of GDP. In 2025, the same volume is very likely to be reached.

Among the largest construction procurements over the three years (excluding defence procurements, including the construction of fortifications) are: road repair and maintenance in various regions, water pipelines for Kryvyi Rih, Marhanets, and Mykolaiv, construction of the Syretsko-Pecherska metro line in Kyiv, restoration of educational and healthcare facilities, as well as the protection of energy infrastructure. Almost half of the local budget expenditures on reconstruction are in frontline regions due to severe destruction. The main reconstruction priority funded by local budgets is housing, while the Restoration Agency procures project management services financed by IFIs.

Over three years, 46% of damaged healthcare facilities and 28% of educational facilities have been restored, and more than \$1 billion has been allocated for housing damage compensation. At the same time, this is significantly less than the funding needs estimated in RDNA4 (\$193 billion for restoring housing, education, healthcare, social, and municipal infrastructure).

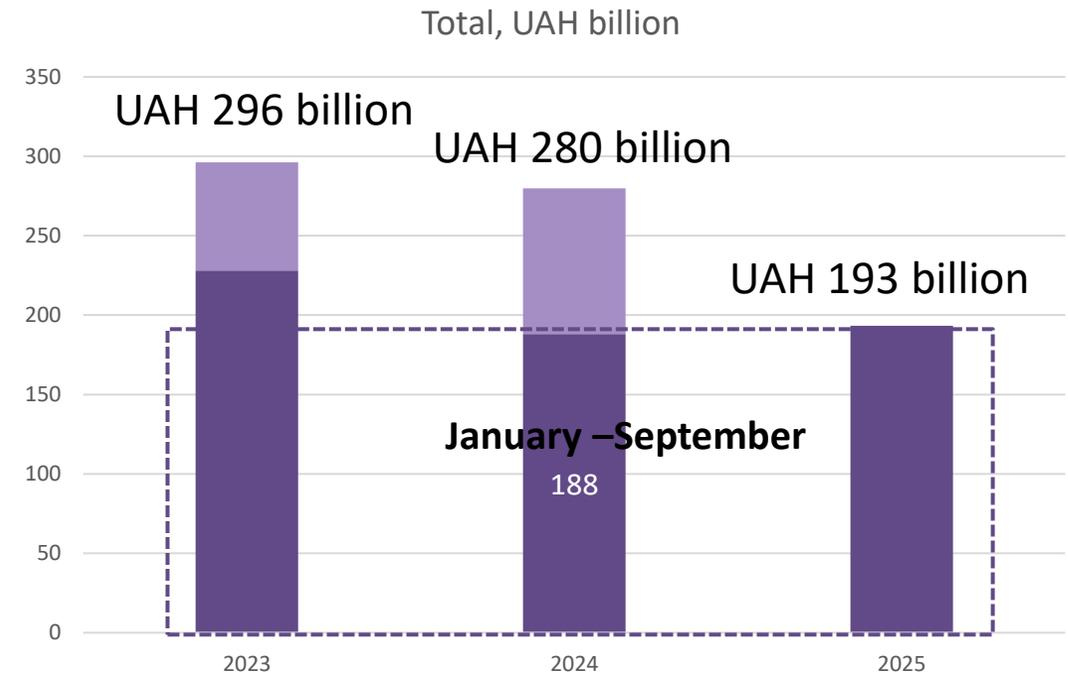
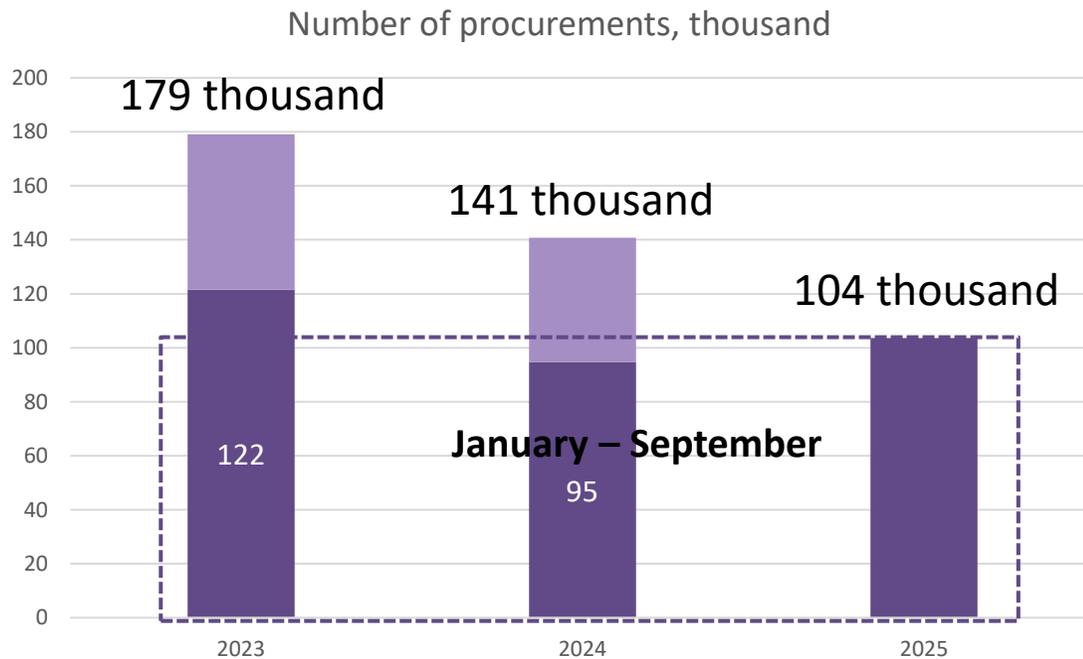
Reconstruction is a key component of the country's resilience despite high security risks. To ensure that the state rebuilds more cheaply, efficiently, and with higher quality, it is necessary to:

- Strategic planning of reconstruction — prioritizing facilities with regard to local community interests, stable and even financing, and ensuring continuity of procurement;
- Improving procurement procedures and oversight, conducting procurements through professional purchasing bodies, adopting a risk-based monitoring approach, and unifying classifiers and terminology;
- Increasing competition in procurement, including opening cost estimates.

Greater availability and openness of data, specifically on reconstruction, will enable society to oversee this process.

# Construction procurements\* are traditionally shifted toward the end of the year

- In 2023–2024, the volume of construction procurements amounted to about UAH 300 billion annually, or roughly 4% of GDP. In 2025, the same volume is very likely to be reached.
- Both in terms of the number of procurements and their value, one-third falls in the fourth quarter.
- Among the largest procurements over the three years are: road repair and maintenance in various regions, water pipelines for Kryvyi Rih, Marhanets, and Mykolaiv, construction of the Syretsko-Pecherska metro line, restoration of educational and healthcare facilities, as well as protection of energy infrastructure.



# The largest construction procurements\* in 2023–2025

Procurement content**	Organizer	Winner	Procurement amount, UAH billion
<b>2023:</b> Engineering and construction works	Служба відновлення та розвитку інфраструктури у Львівській області	ТОВ «Onur Construction International» LLC and others	8.7
<b>2024:</b> Construction of the Syretsko-Pecherska metro line in Kyiv	СЕ «Kyivskyi metropoliten»	«Group of companies «Avtostrada» LLC	13.8
<b>9 months of 2025:</b> New construction of a water intake from the Southern Bug River and a main water pipeline to supply the city of Mykolaiv with water	Service for Restoration and Development of Infrastructure in Dnipropetrovsk Oblast	«Group of companies «Avtostrada» LLC	4.9

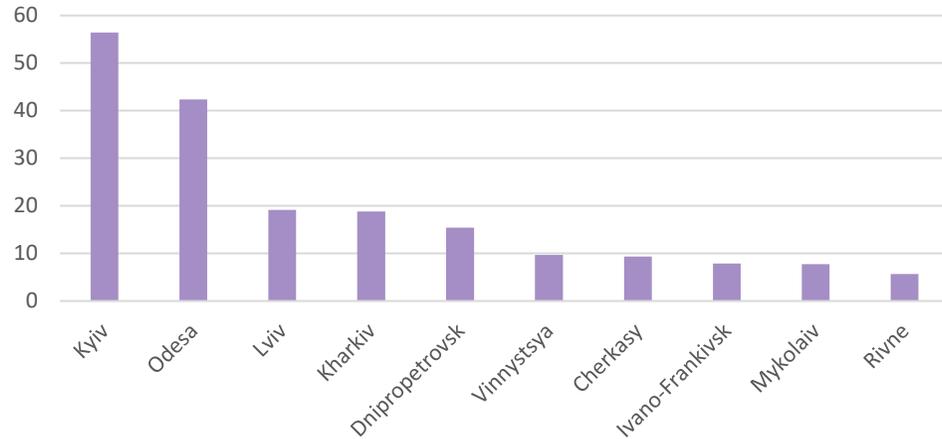
\*construction and ongoing reconstruction procurements

\*\*More details on the largest procurements in 2023–2025 can be found in Annexes 2, 3, and 4.

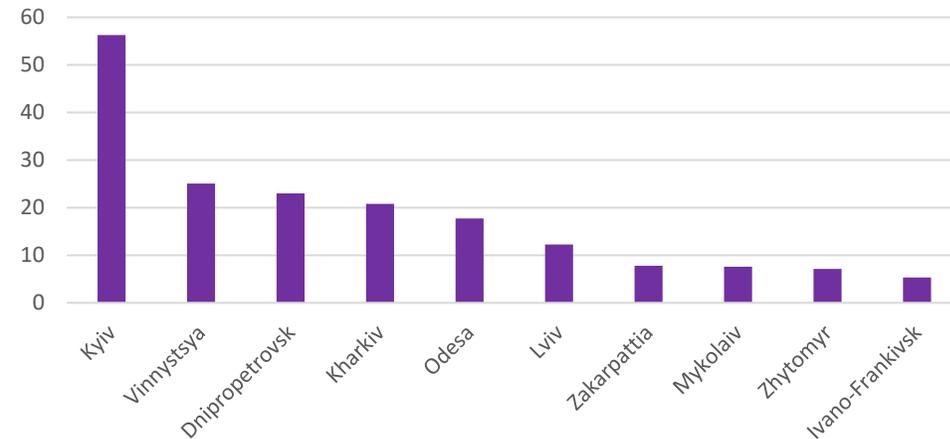
# Kyiv and Kyiv oblast are among the leaders by construction procurements\*

Total amount of bids won by region\*\*, UAH billion

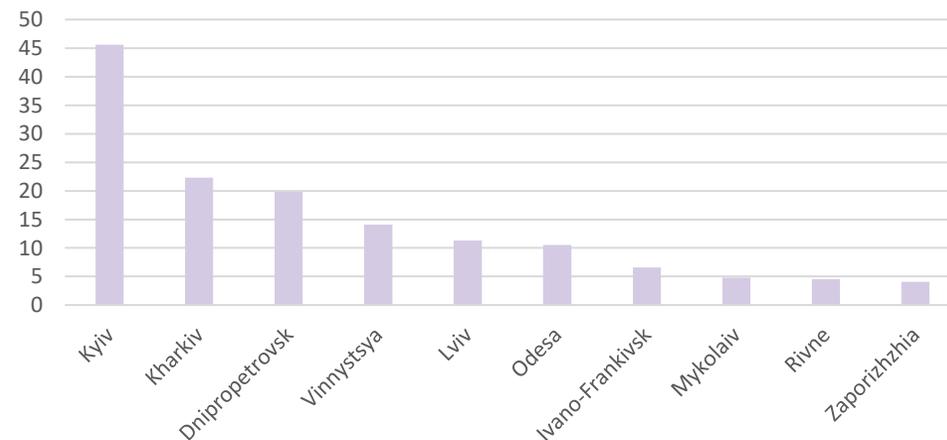
Sum of bids won by region, UAH billion (2023)



Sum of bids won by region, UAH billion (2024)



Sum of bids won by region, UAH billion (9 m 2025)



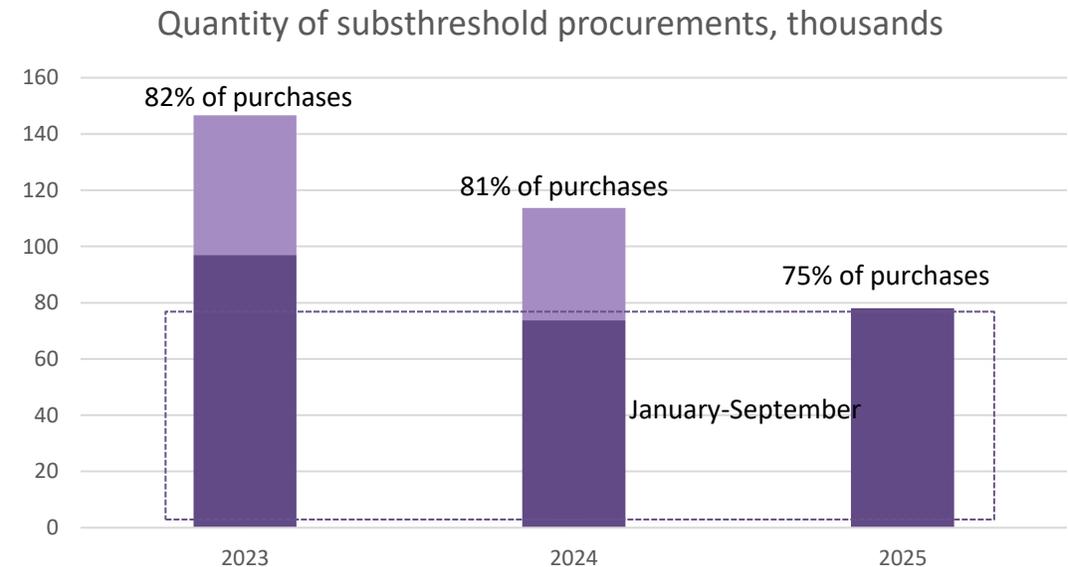
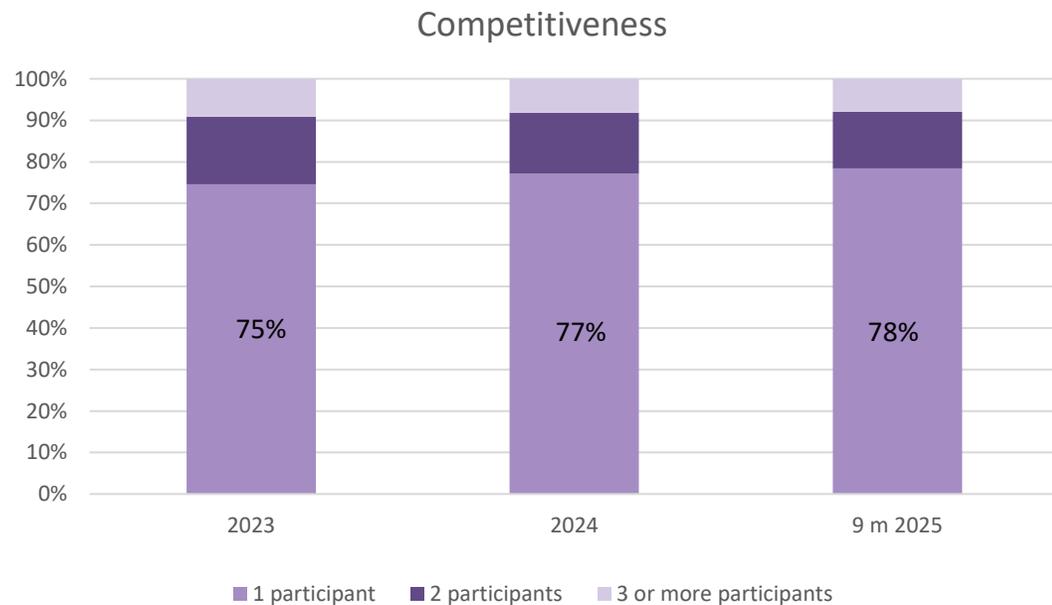
For the third year in a row, Kyiv and Kyiv Oblast have the largest volumes of construction procurements, although this is rarely actual reconstruction.

Vinnystsia, Dnipropetrovsk, Kharkiv, and Odesa oblasts are also among the leaders.

# Competitiveness within procurements\* remains low

Across all three years, procurements with a single participant predominate, while the level of competitiveness in procurements is gradually deteriorating.

At the same time, the share of below-threshold procurements is decreasing.



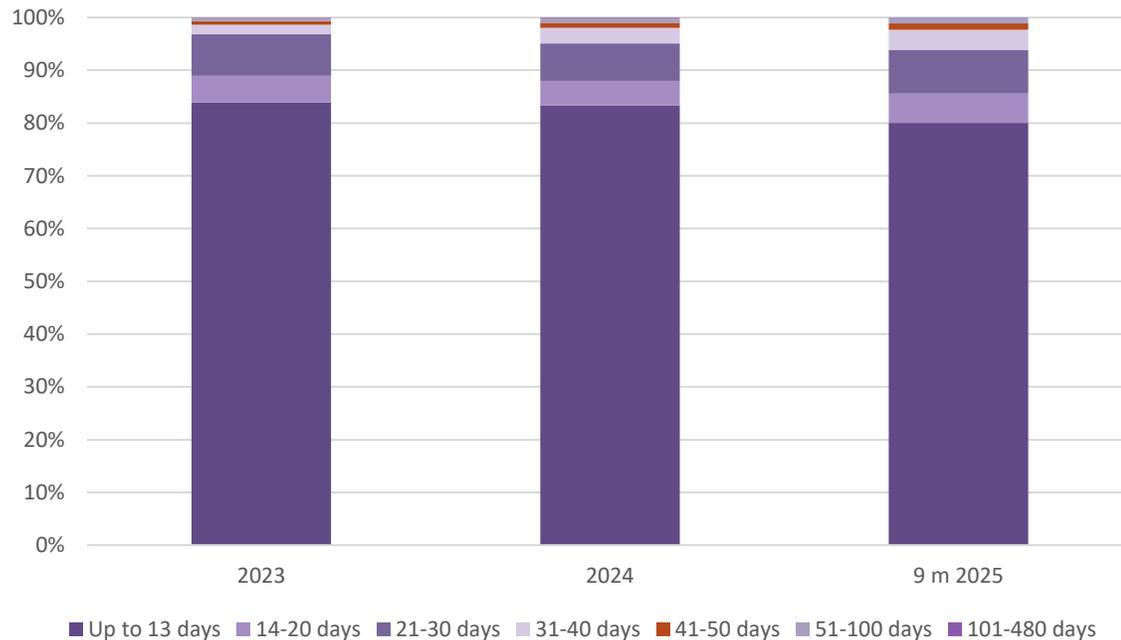
# At the same time, the more participants a procurement has, the lower becomes the price

No	Procurement	Organizer	Winner	Cost, million UAH (expected/actual)	Participants
<b>All procurements</b>					
2023:	Construction and ongoing repairs	JSC «Oschadbank»	PE «Eurobud»	2.3 / 2.0 (-10%)	17
2024:	ongoing repair of the NBU headquarters	National Bank of Ukraine	«Clarity Actions» LLC	12.6 / 9.4 (-25%)	13
2025:	development of the project documentation for the road reconstruction	Service for Restoration and Development of Infrastructure in Lviv Oblast	Individual entrepreneur Sypen Taras Volodymyrovych	5.0 / 1.0 (-80%)	17
<b>Procurements totalling more than UAH 20 million</b>					
2023:	Construction of sites and access roads at deposits in the Kharkiv, Dnipropetrovsk, and Poltava Oblasts.	JSC «Ukrhazvydobuvannya»	«Leman-Beton» LLC	47.9 / 42.8 (-11%)	10
2024:	Reconstruction of the substation «Novovolynsk», Volynska oblasz	PJSC «Ukrenerho»	«Energygrup» LLC	24.4 / 22.2 (-9%)	9
2025:	Reconstruction of the food processing unit with a dining hall at Kozelets Lyceum №3, Chernihiv Oblast.	Department of Education, Culture, Family, Youth, and Sports of the Kozelets Village Council.	PE «Firma «Nominal»	40.4 / 36.7 (-9%)	7

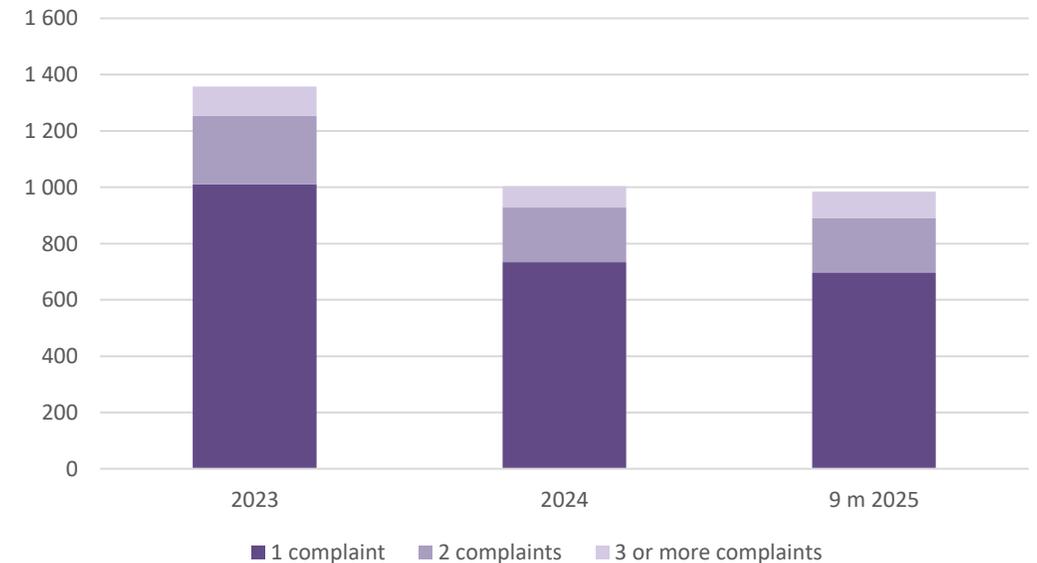
# The vast majority of procurements\* is conducted within three weeks

- In 2023 – 2024, about 80% of bids lasted less than two weeks, and only 6% lasted longer than 50 days.
- In 2025, the duration of procurements slightly increased—the share of those lasting more than one month rose to 6%. Only about 1% of procurements are appealed, and this share has been stable over the past three years.

Bid length



Number of complaints on purchases



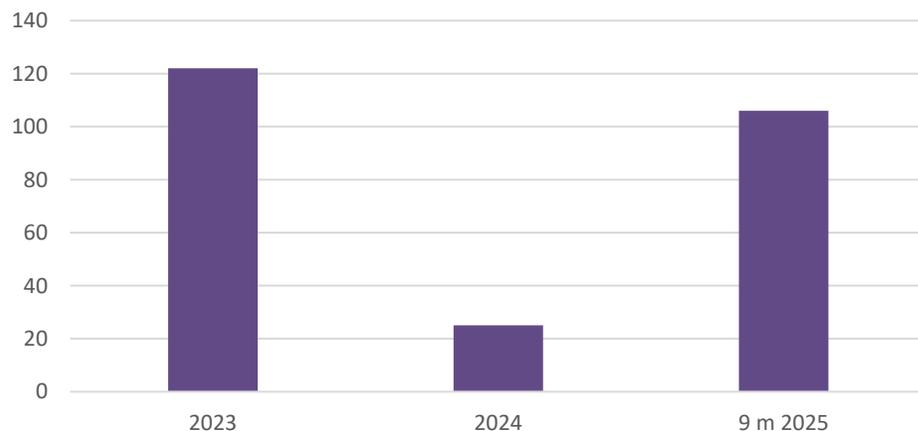
# Recovery agency has increased its procurements in 2025

- The Recovery Agency also spends significant funds—both directly and through the regional restoration services.
- At the same time, the Agency's direct procurements (excluding the regional services) are dominated by services for project support financed by International Financial Organizations (IFOs), as well as road surveys. Other projects include technical support for the "E-road" system, supply of software, etc.

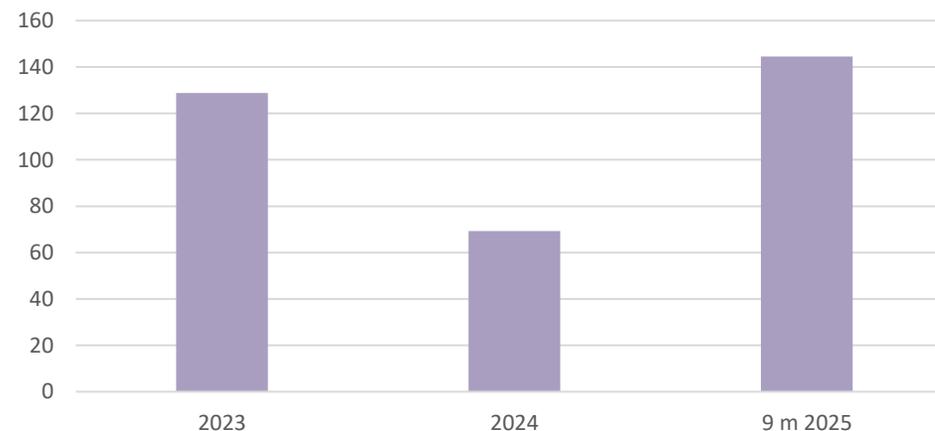
## Biggest lots

Contents**	Winner	Value
<b>2023:</b> Services for current management and support of projects financed by international financial organizations	SE «Ukrdorinvest»	UAH 8.6 million
<b>2024:</b> Services for current management and support of projects financed by international financial organizations	SE «Ukrdorinvest»	UAH 30.7 million
<b>9 mic. 2025:</b> Services for conducting current surveys of automobile roads	SE «Dorozhnii naukovotekhnichniy centr»	UAH 49.1 million

Number of purchases (Recovery agency)



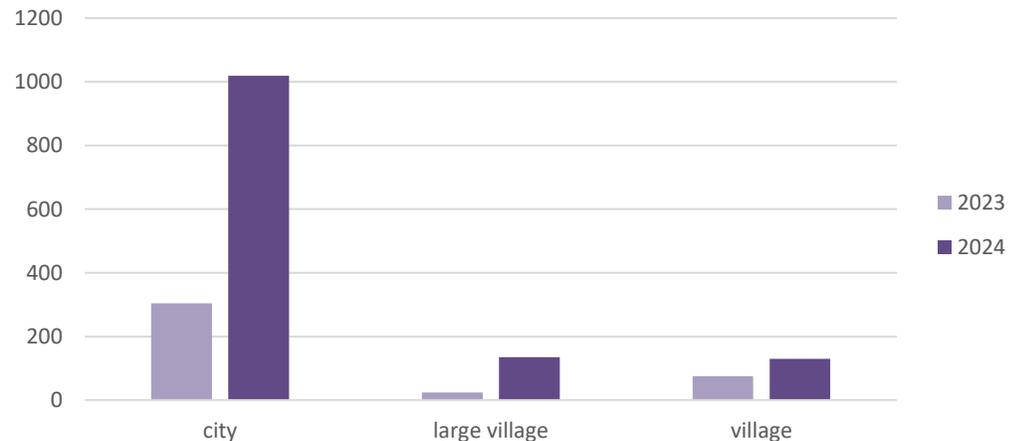
Sum of purchases (UAH mln)



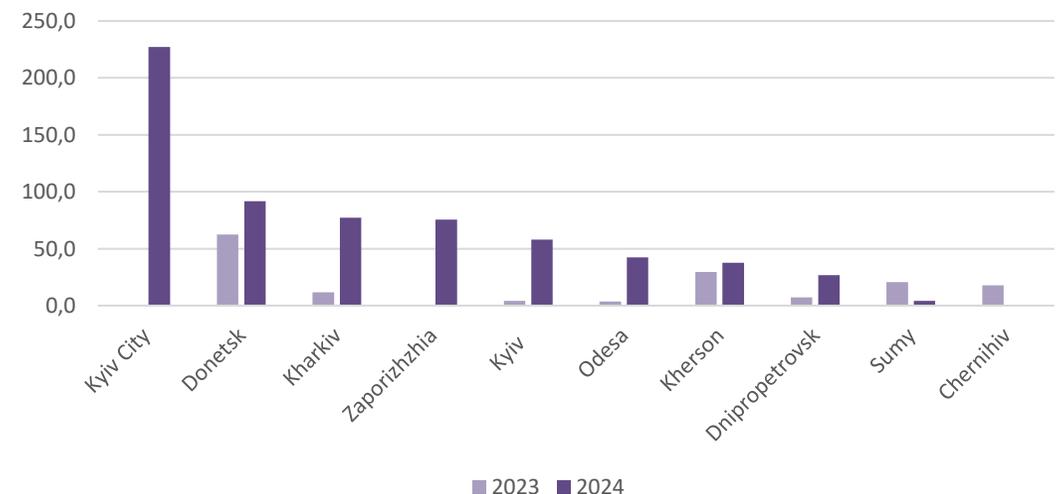
# Local budgets\* in 2023–2024 have financed the recovery with the total of UAH 1.7 billion

- Overall, local budgets financed UAH 1.7 billion of expenditures for restoration in 2023–2024. The largest expenditures were in cities.
- The vast majority of restoration expenditures (excluding Kyiv) were in frontline regions, which is explained by significant destruction.
- Kyiv and Kyiv Oblast together financed UAH 683 million in 2023–2024. Donetsk, Kharkiv, Zaporizhzhia, and Sumy Oblasts together financed UAH 617 million. The Southern Oblasts (Odesa, Kherson, Mykolaiv) spent UAH 355 million over two years.

Expenditures on housing reconstruction by type of settlement, UAH million



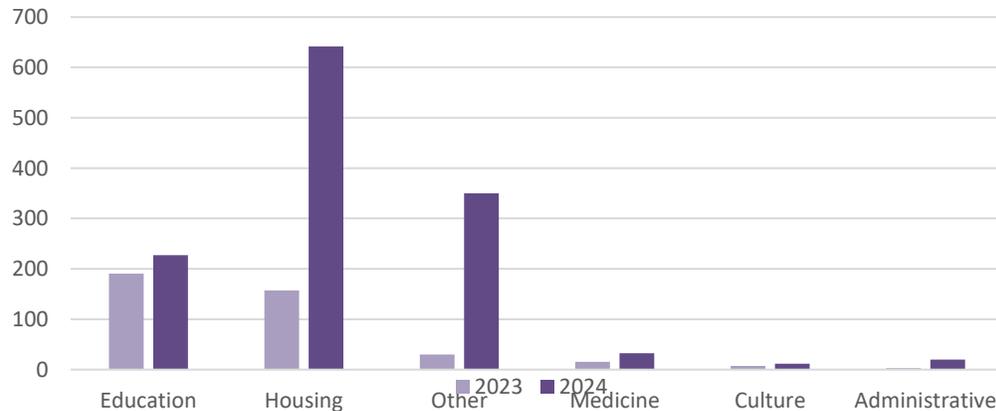
Expenditures on housing reconstruction by region, UAH million



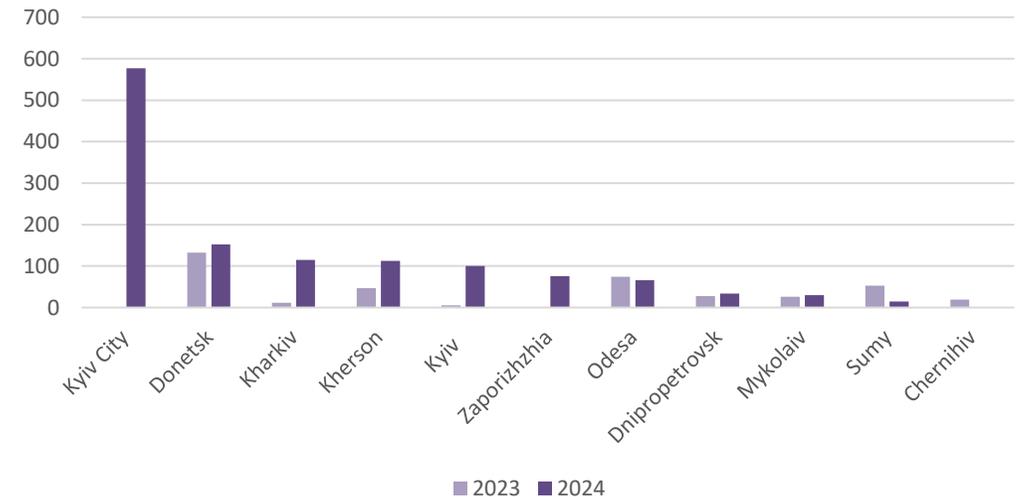
# Key recovery focus is housing

- The largest share of local budget expenditures in 2023–2024 went towards housing reconstruction (799 million UAH, nearly half of all expenditures). This is due to significant losses: according to the RDNA4 assessment, as of the end of 2024, 13% of housing was damaged or destroyed, affecting over 2.5 million households.
- In 2023, the highest expenditures for housing reconstruction were recorded in the Donetsk (UAH 62.4 million), Kherson (UAH 29.5 million), and Sumy (UAH 20.8 million) Oblasts. In 2024, the largest expenditures were in the City of Kyiv (UAH 227.1 million). At the same time, reconstruction expenditures in the Donetsk Oblast also increased by 47% to UAH 91.7 million.

Local budget expenditures for reconstruction by type of facility, UAH million



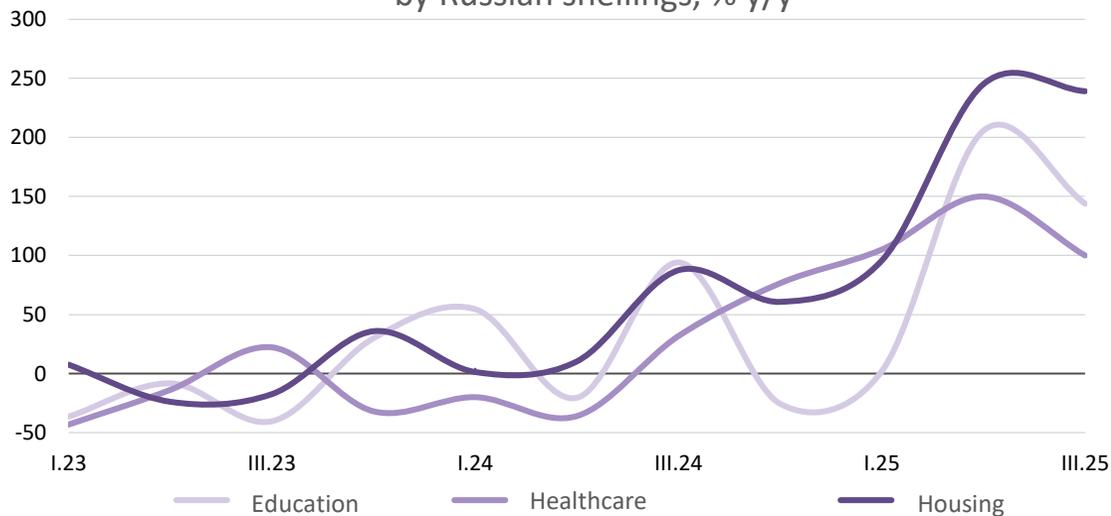
Local budget expenditures for reconstruction by region, UAH million



# Reconstruction does not keep up with destruction, losses are growing

- Despite the risks of new destruction and further losses, restoration processes are gradually improving, including under public control. Overall, construction procurements have reached \$20 billion over three years. 46% of damaged medical facilities and 28% of educational institutions have been restored, and over \$1 billion has been allocated for housing destruction compensation.
- However, restoration is significantly lagging behind the destruction, partly due to a lack of funding. According to the RDNA4 assessment, total losses to housing, educational and medical facilities, communal and municipal services exceeded \$80 billion as of the end of 2024, with reconstruction needs estimated at \$190 billion. This year, losses due to Russian shelling have sharply increased.
- Strategic planning, object prioritization, stable financing, further streamlining of procurement and control procedures, and increased competition will allow Ukraine to be rebuilt cheaper, more efficiently, and with higher quality.

Current losses within housing and infrastructure caused by Russian shellings, % y/y



Sources: ACLED, [NBU calculations](#).

losses and recovery needs by economic sectors, \$ billion

Sectors	Direct losses	Recovery needs
Housing	57.6	83.7
Education and science	13.4	32.9
Healthcare	1.6	19.4
Social security	0.4	38.9
Water supply	4.6	11.3
Municipal service	2.9	6.9
<b>Total</b>	<b>80.5</b>	<b>193.1</b>

Source: [RDNA4](#).

# Appendices

# Appendix 1

Number of participants	Number and % of procurements in January-September		Value (billion) and % of procurements in January-September		Number and % of procurements in September		Value (billion) and % of procurements in September	
1 participant	15 363	81.3%	89.7	69.9%	1 027	91.1%	4,7	91.1%
2 participants	2 227	11.8%	24.0	18.7%	75	6.7%	0,4	7.8%
3 participants	791	4.2%	9.4	7.3%	19	1.7%	0,1	1.0%
4 participants	282	1.5%	2.2	1.7%	5	0.4%	0,0	0.1%
5 participants	132	0.7%	2.5	1.9%	0	0.0%	0,0	0.0%
6 participants	57	0.3%	0.3	0.2%	0	0.0%	0,0	0.0%
7-17 participants	45	0.2%	0.2	0.2%	1	0.1%	0,0	0.0%
<b>Total number of completed procurements within the electronic system</b>	<b>18 903</b>	<b>100.0%</b>	<b>128.3</b>	<b>100.0%</b>	<b>1 127</b>	<b>100.0%</b>	<b>5.1</b>	<b>100.0%</b>

# Appendix 2. Five biggest construction procurements of 2023

No	Procurement	Organizer	Winner	Cost, million UAH
1.	Engineering and construction	Service for Restoration and Development of Infrastructure in Lviv Oblast	«Onur Construction International» LLC and others	8.7
2.	Construction of pipelines, communication and power transmission lines, highways, roads, airfields, and railways	Service for Restoration and Development of Infrastructure in Odesa Oblast	«Rosdorstoi» LLC, «Avtomagistral-Pivden» LLC and others	5.5
3.	Engineering and construction	Service for Restoration and Development of Infrastructure in Zaporizhzhia Oblast	«Avtomagistral-Pivden» LLC	5.4
4.	Construction of the new Inhulets River trunk water pipeline to supply water to the city of Kryvyi Rih	Service for Restoration and Development of Infrastructure in Dnipropetrovsk Oblast	«Avtomagistral-Pivden» LLC	5.3
5.	Construction of the new Khortytsia – Tomakivka – Marhanets trunk water pipeline	Service for Restoration and Development of Infrastructure in Dnipropetrovsk Oblast	«Avtostrada» LLC	5.3

# Appendix 3. Five biggest construction procurements of 2024

No	Procurement	Organizer	Winner	Cost, million UAH
1.	Construction of the Syretsko-Pecherska metro line in Kyiv	CE «Kyivskiyi metropoliten»	«Group of companies «Avtostrada»» LLC	13.8
2.	Construction of a facility to protect the HEP-2 building of the Dnipro HEP	PJSC «Ukrhydroenerho»	TOB «Budivelna kompaniia «Adamant»	4.4
3.	Construction of a facility to protect the main electrical equipment of the Dnistro HPSP	PJSC «Ukrhydroenerho»	PE «Elitbud-1»	4.2
4.	Construction of pipelines, communication and power transmission lines, highways, roads, airfields, and railways	Service for Restoration and Development of Infrastructure in Odesa Oblast	«Rosdorstroi» LLC; «Avtomagistral-Pivden» LLC	3.5
5.	Construction of a new water intake facility from the Southern Bug River to supply water to the city of Mykolaiv	Service for Restoration and Development of Infrastructure in Mykolaiv Oblast	«Rosdorstroi» LLC	2.6

# Appendix 4. Five biggest construction procurements over 9 months of 2025

No	Procurement	Organizer	Winner	Cost, million UAH
1.	Operational maintenance of public highways of state significance in Mykolaiv Oblast	Service for Restoration and Development of Infrastructure in Mykolaiv Oblast	«Rosdorstroj» LLC	3.4
2.	Construction of the complex of the Communal Non-Commercial Enterprise "Oblasnyy Centr Onkolohii"	Capital construction department of the Kharkiv Regional military administration	Consortium «Building Grup»	3.2
3.	Construction of a new water intake facility from the Southern Bug River and a trunk water pipeline to supply water to the city of Mykolaiv	Service for Restoration and Development of Infrastructure in Dnipropetrovsk Oblast	«Avtostrada» LLC	2.8
4.	Construction of a new water intake facility from the Southern Bug River and a trunk water pipeline to supply water to the city of Mykolaiv, Section III	Service for Restoration and Development of Infrastructure in Dnipropetrovsk Oblast	«Avtostrada» LLC	2.1
5.	Construction of an international border crossing point on the Ukrainian-Romanian state border	Service for Restoration and Development of Infrastructure in Zakarpattia Oblast	TOB «Onur Construction Internationalнл»	2.0

# Annex 5. Procurements\* with the biggest number of participants in 2023

No	Procurement	Organizer	Winner	Cost, million UAH (expected/actual)	Participants
<b>All procurements</b>					
1.	Installation of fire alarm systems in the CE "Varva House of Culture"	Department of Culture of the Varva Village Council of Pryluky Raion, Chernihiv Oblast	Individual entrepreneur Melnychenko Ivan Yuriiovch	0.7 / 0.4 (-50%)	21
2.	Installation of a fire alarm system in the premises of the House of Culture, Kyiv Oblast	Department of Culture, Youth, and Sports of the Rokytno Village Council	Individual entrepreneur Yarmolenko Tamara Mykolaivna	0.4 / 0.2 (-47%)	20
3.	Construction works and ongoing repairs	JSC «Oschadbank»	PE «Evrobud»	2.3 / 2.0 (-10%)	17
<b>Procurements totalling more than UAH 20 million</b>					
1.	Construction of sites and access roads at deposits in the Kharkiv, Dnipropetrovsk, and Poltava Oblasts	JSC «Ukrhazvydobuvannya»	«Leman-Beton» LLC	47.9 / 42.8 (-11%)	10
2.	Construction of sites and access roads at deposits in the Poltava Oblast	JSC «Ukrhazvydobuvannya»	«Leman-Beton» LLC	37.6 / 27.4 (-27%)	9
3.	Construction of sites and access roads at deposits in the Lviv, Ivano-Frankivsk, and Zakarpattia Oblasts	JSC «Ukrhazvydobuvannya»	TOB «Promin Bud Service» LLC	29.2 / 24.4 (-17%)	9

\*construction and ongoing reconstruction procurements

# Appendix 6. Procurements\* with the biggest number of participants in 2024

No	Procurement	Organizer	Winner	Cost, million UAH (expected/actual)	Participants
<b>All procurements</b>					
1.	Ongoing repair of the NBU headquarters	National Bank of Ukraine	«Clarity Actions» LLC	12.6 / 9.4 (-25%)	13
2.	Routine repair of the asphalt concrete pavement of the road, Boyarka, Kyiv Oblast	CE "Boyarka Main Production Department of Housing and Communal Services"	«Mishem» LLC	1.9 / 1.2 (-34%)	13
3.	Capital repair of the roof of a village school in the village of Karpylivka	Desna village council	«Stroibud Consult Invest» LLC	3.5 / 2.0 (-42%)	12
<b>Procurements totalling more than UAH 20 million</b>					
1.	Reconstruction of the "Novovolynsk" substation, Volyn Oblast	PJSC «Ukrenerho»	«Energygrupp» LLC	24.4 / 22.2 (-9%)	9
2.	Capital repair of a bridge in Khmelnytskyi Oblast	Service for Restoration and Development of Infrastructure in Khmelnytskyi Oblast	«Enerhetychno-dorozhne budivnytstvo» LLC	38.9 / 24.0 (-38%)	7
3.	Painting and glazing	JSC «Ukrhazvydobuvannya»	«BPK Hazinvestproject» LLC	36.7 / 25.6 (-30%)	6

# Appendix 7. Procurements\* with the biggest number of participants over 9 months of 2025

No	Procurement	Organizer	Winner	Cost, million UAH (expected/actual)	Participants
<b>All procurements</b>					
1.	Development of design documentation for the repair of an automobile road	Service for Restoration and Development of Infrastructure in Lviv Oblast	Individual entrepreneur Sypen Taras Volodymyrovych	5.0 / 1.0 (-80%)	17
2.	Development of design documentation for the repair of an automobile road	Service for Restoration and Development of Infrastructure in Lviv Oblast	PE «Polissia-Project»	4.0 / 1.2 (-70%)	17
3.	Ongoing repair of the administrative building in Kyiv city	National Bank of Ukraine	«Dia Grupp» LLC	1.9 / 1.4 (-26%)	13
<b>Procurements totalling more than UAH 20 million</b>					
1.	Reconstruction of the food processing unit with a dining hall at Kozelets Lyceum №3, Chernihiv Oblast	Department of Education, Culture, Family, Youth, and Sports of the Kozelets Village Council	PE «Firma «Nominal»	40.4 / 36.7 (-9%)	7
2.	Construction of a forest automobile road in Vinnytsia Oblast	SFSP "Forests of Ukraine"	PE «Avtomagistral»	30.4 / 20.9 (-31%)	7
3.	Works on mining and technical reclamation of the southern part of the cutting trench of the "Verbolozivskyi" open-pit mine	SE "United Company 'Ukrvuhlerestrukturyzatsiia' "	«Montazhbudyug» LLC	41.5 / 30.5 (-26%)	6

# Annex 8. Biggest contractors and lots of the Recovery agency in 2023

No Procurement	Winner	Procurement cost, UAH million
1. Services for current management and support of projects financed by international financial organizations	SE «Ukrdorinvest»	8.6
2. Services for technical support of the Platform for building "E-road" systems	«Ef Tek» LLC	7.9
3. Services for providing the programme supply and technical support	«Vi Em Gi» LLC	7.5

Winner	Procurement cost, UAH million
1. SE «Natsionalnyi institute rozvtku infrastruktury»	35.3
2. «Ef Tek» LLC	13.1
3. «Vi Em Gi» LLC	11.6

# Annex 9. Biggest contractors and lots of the Recovery agency in 2024

No Procurement	Winner	Procurement cost, UAH million
1. Services for current management and support of projects financed by international financial organizations	SE «Ukrdorinvest»	30.7
2. Services for conducting current surveys of automobile roads	SE «Dorozhnii naukovo-tekhnichnyi centr»	14.2
3. Services for technical support of the Platform for building "E-road" systems	SE «Smart Integration Grup»	6.0

Winner	Procurement cost, UAH million
1. SE «Ukrdorinvest»	30.7
2. SE «Dorozhnii naukovo-tekhnichnyi centr»	14.2
3. SE «Smart Integration Grup»	7.5

# Annex 10. Biggest contractors and lots of the Recovery agency over the 9 months of 2025

No Procurement	Winner	Procurement cost, UAH million
1. Services for conducting current surveys of automobile roads	SE «Dorozhnii naukovo-tekhnichnyi centr»	49.1
2. Services for current management and support of projects financed by international financial organizations	SE «Ukrdorinvest»	43.6
3. Services for technical support of the Platform for building "E-road" systems	SE «Smart Integration Grup»	8.6

Winner	Procurement cost, UAH million
1. SE «Dorozhnii naukovo-tekhnichnyi centr»	49.1
2. SE «Ukrdorinvest»	43.6
3. SE «Natsionalnyi institut rozvytku infrastrucuty»	14.7



**Thanks for attention!**

**Project «Recovery Spending Watchdog»**

