



Ukraine 2036

How Today's Investments
Will Shape Tomorrow's Security

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Cover: Motherland monument on Ukrainian Flag day 2024. Credit: Edward Matthews via Alamy.

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Executive Summary

Europe must decide its future now. By 2036, either Ukraine is a secure, integrated part of a European economic space and Europe governs a predictable flank, or, alternatively, Europe must contend with a gray-zone frontier that hardens at the European Union's border, draining budgets and stretching political bandwidth. Which of these divergent futures prevails rests on preparations European leaders who must make now to field a permanent defense posture in and with Ukraine and finance reconstruction on transparent, performance-tied terms, with the United States providing structural continuity rather than front-stage leadership.

Crucial measures that must be taken now include:

- **Europe must lead a visible, sustained deterrent with — and inside — Ukraine, with the United States as a structural enabler.** This requires moving from ad hoc aid to an institutional posture: permanent training with Ukrainian units, integrated intelligence, in-country logistics and maintenance, and systematic hardening of energy, rail, and digital networks. Washington wires in continuity through long-horizon compacts and deep intel/cyber cooperation.
- **Reconstruction must run in parallel with defense — and be radically transparent to lure private capital.** Needs are on the order of **\$524bn** over a decade, with mine contamination affecting approximately **139,000 square kilometers (53,670 square miles)**. Delivery should flow through open-data systems (e.g., DREAM) and a unified, Ukraine-co-led coordination platform, with disbursements tied to governance benchmarks to lower risk premiums and deter capture.
- **Lock in institutional credibility now, with constitutional clarity, completed judicial staffing, independent anti-corruption bodies, and inclusive first postwar elections under the 2020 code.** Clarify emergency powers and center-local competences during martial law, finish merit-based judicial appointments, safeguard anti-corruption agencies, and prepare elections that include internally displaced people and citizens abroad to ensure political legitimacy and continuing reforms toward European integration.
- **Treat social policy as security policy.** Scale demining to unlock land, logistics, and housing; expand veteran rehabilitation, retraining, and employment pipelines to meet needs that could touch millions; and address demography with housing and labor-market measures that connect IDPs, returnees, and the diaspora to the rebuild. These choices underpin cohesion and growth.
- **Design financing and delivery to reward integrity and performance.** Align instruments from the EU and international financial institutions with transparent procurement and real-time project tracking, formalize sector

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leads (energy, rail, digital, demining) on a common platform with Ukraine as an equal participant, and use conditionality to reassure private investors and anchor supply chains in Ukraine rather than bypassing them.

- **Judge success by observable outputs by end-2026.** In Europe/with Ukraine: routine training rotations, an actionable intel liaison, in-country maintenance capacity, and hardened energy/rail/digital nodes; in Kyiv: legislated emergency-powers and center-local clarity, substantial judicial staffing, election readiness that includes IDPs and citizens abroad, and reconstruction projects planned and audited via open data.

Photo: Children in winter clothes holding a Ukrainian flag. Credit: Michele Ursi via Alamy.



Introduction

It is 2036. Europe's eastern flank is quiet. A European-led security posture with and inside Ukraine — permanent training, integrated intelligence, in-country logistics and maintenance, and protection of energy, rail, and digital networks — has made renewed Russian aggression prohibitively costly. Defense production has scaled to a sustainable rhythm; stockpiles are adequate and replenishment is routine. Budgets are planned across years rather than quarters. Stability opens space for the priorities governments have struggled to finance and sequence: accelerating the energy transition, renewing Europe's industrial base rather than subsidizing it in emergencies, and investing in social policy for aging and more diverse societies. Ukraine is not a special project but part of a wider European economic space. Reconstruction is auditable, courts are dependable enough for commercial life, and the workforce that left during the war returns in meaningful numbers because opportunity is predictable.

There is another potential 2036. A gray-zone frontier at the EU border absorbs resources and time. Ammunition and maintenance remain tight; procurement is reactive. Reconstruction in Ukraine has produced showcase projects but uneven delivery; mine and unexploded-ordnance contamination on the scale of a small European state still constrains agriculture, housing, and logistics. Elections have occurred, but late and only partially inclusive, and the judiciary remains slow. And Europe as a whole pays the price. Climate targets slip as funds and political attention are pulled into recurring security responses. Industrial policy stays defensive, managing risk and redundancy rather than modernizing. Social spending becomes more about cushioning shocks than improving outcomes. Investors hedge east of the single market. The opportunity cost is cumulative: a decade of drift.

A quiet Eastern flank is not a moral project; it is a governing strategy. When crises stop dictating budget cycles, European governments can reorder priorities that have been deferred since 2022: energy system upgrades on planned timelines rather than emergency buys; industrial renewal that focuses on modernization of grids, storage, and clean manufacturing rather than defensive subsidies; and social policy that fosters cohesion in aging, more diverse societies. The spillovers are practical: defense production sized to the threat supports skilled employment and dual-use innovation, cross-border transport becomes more predictable, and investors treat Ukraine and its neighbors as an extension of the European market rather than as an exception. The alternative is foreseeable: a gray zone on the EU's border would keep fiscal policy reactive, draw political attention back to crisis management, and push firms to pay for redundancy instead of productivity.

Now or Never

The hinge between these futures is not in Moscow or in Kyiv, and it is not activated at some far-off date in the future. It is in Berlin, Paris, Warsaw, Brussels, London, and Washington — and the door is swinging *now*. An agreement with the Kremlin may pause fighting; it does not produce air defenses, maintenance, or multiyear appropriations, and it does not build the European capacity that turns deterrence from a statement into a reality. The decisive choices are Western: whether Europe assumes visible responsibility for a credible deterrent with and inside Ukraine; whether multiyear financing is tied to transparent delivery; whether the United States supplies structural continuity — long-term compacts, deep intelligence and cyber cooperation, and risk-sharing instruments — without needing to sit in front. Kyiv's own reforms are necessary, but they are not sufficient and they are not independent variables: They are far more likely to stick if Europe and the United States make the surrounding architecture real.

Negotiations will occur, but their meaning differs across capitals. For Western governments, talks are a way to end fighting; for Moscow, they have repeatedly served to improve position by buying time, fragmenting allies, or codifying advantageous facts on the ground. That asymmetry is why any political arrangement must be anchored in Western enforcement capacity rather than on paper alone. Ceasefire-first proposals untethered to guarantees, production, and training pipelines are pauses by design. Arrangements backed by predictable Western power — security commitments that can be executed; multiyear appropriations; and standing routines for training, intelligence, logistics, and infrastructure protection — alter incentives on both sides in ways that signatures cannot.

Time and industry are now strategic terrain. Russia has shifted to a war-based economy and has transformed into a war-based society. Europe cannot assume that uneven deliveries and improvised procurement rounds will suffice as a baseline threat persists. The same years in which Ukraine requires sustained support are the years in which Europe must rebuild its own defense capacity. Waiting for one to end before beginning the other would fail both. The practical answer is a visible, European-led deterrent posture with and inside Ukraine: permanent training missions; deeper intelligence integration that shortens the distance between information and action; in-country logistics and maintenance; and systematic hardening of energy, rail, and digital networks so civilian life and economic activity continue even under pressure. Deterrence is not a slogan: It is an observable posture and a funded routine.

Coalition stamina is a policy variable, not a mystery. Europe can make its own timelines more reliable by institutionalizing the flows that matter: multiyear procurement for munitions and maintenance, a permanent training mission with Ukrainian units, intelligence arrangements that shorten the distance between

information and action, and in-country logistics that keep systems serviceable. These are observable measures. They reduce the premium investors and voters attach to headline risk and make allied commitments less sensitive to swings in any single capital. They also answer the recurring objection that “support cannot be open-ended”: The point is not to promise forever, but to build routines that are delivered on time and judged by results.

The United States remains essential, but its most effective role in this model is structural. Long-term compacts that standardize training and logistics; deeper intelligence, cyber, and space cooperation; and instruments that de-risk private capital alongside European finance all contribute to continuity. None of this requires Washington to be the visible lead. It requires steadiness across electoral cycles. If Europe assumes responsibility for the posture and the financing, and if the United States supplies predictability and risk-sharing, Western policy becomes less exposed to swings in any single capital.

Aims matter as much as means. Helping Ukraine win battles is necessary; shaping a postwar order that deters renewed aggression and integrates Ukraine into Western institutions is the objective. Battlefield success that is not institutionalized risks becoming a prelude. Conversely, institutional commitments made early — on security cooperation, on reconstruction finance tied to transparent delivery, on practical pathways to political and economic integration — shape behavior during the conflict and fix expectations after it. Proposals that prioritize an immediate halt in fighting without building enforcement mechanisms attempt to purchase calm on credit and often embed ambiguity that favors the aggressor.

Domestic politics will decide what policy can sustain. The most consequential “negotiations” are within allied systems: parliaments setting budgets, ministries writing contracts, parties explaining timelines and costs to voters. European governments cannot control US politics, but they can reduce exposure to it by building capacity and taking visible responsibility for deterrence and reconstruction. That requires clear communication about the scale of the task and the trade-offs over time, as well as delivery that is regular and auditable rather than episodic and headline-driven.

Here and Now

The benefits of credible deterrence in Ukraine accrue directly to European societies. A stable eastern flank creates fiscal and political room for priorities that have been deferred: The energy transition becomes a planning exercise rather than a crisis response; industrial policy shifts from emergency subsidies to long-term investment in grids, storage, clean-tech manufacturing, and cross-border transport; and social policy focuses on cohesion in aging, diverse societies instead of coping with

recurrent shocks. Defense production sized to the threat also has civilian spillovers — skilled employment, dual-use technology, and supply-chain resilience — that are harder to build in a cycle of scarcity.

Financing should be designed to reward integrity and delivery. That is not an abstract principle: It is a structure. Align major European and multilateral instruments with open-data planning and execution so that citizens and donors can see priorities, contracts, and results. Use a single coordination platform, with Ukraine as an equal participant, to avoid duplication and to tie disbursements to governance benchmarks. This approach lowers risk premiums, attracts private capital, and gives European publics a way to see whether their money is achieving what it is supposed to achieve. It also builds habits on both sides that persist beyond the first tranche of reconstruction.

Failure to act forecloses those choices. A frozen conflict on the EU's border would keep budgets tight and unpredictable. Governments would spend more on improvised security and less on reform of pensions, health systems, and education. Climate targets would drift as attention and capital are diverted. The industrial base would remain reactive, with firms investing in redundancy rather than modernization. Politics would grow more brittle as voters tire of paying for an open-ended gray zone without a clear plan to end it. These are not abstract risks. They are the predictable opportunity costs of postponing decisions that could be taken now.

There is also a transatlantic dividend. If Europe leads on deterrence and finances reconstruction on terms that reward integrity, it reduces the degree to which Washington's domestic cycles can upend policy. A steadier division of labor — Europe visible, the US structural — makes allied commitments more credible to adversaries and to investors. It reassures publics that the strategy is not an open-ended promise but a defined set of tasks that can be specified, budgeted, and evaluated.

Two objections recur and can be addressed directly. The first is escalation risk. A European-led deterrent posture with and inside Ukraine, including permanent training; integrated intelligence, logistics, and maintenance in-country; and protection of energy, rail, and digital networks, reduces the need for crisis responses; it does not invite them. Deterrence here is not a public relations exercise; it is the routine that makes coercion costlier and less likely. The second concerns the risk of corruption. The response is to design out the opportunity: Run reconstruction through open-data systems, protect anti-corruption bodies and the judiciary, and condition finance on delivery that can be audited. These measures do not guarantee perfection, but they turn a generic concern into a management problem with measurable outputs.



Photo: Statue in Maidan Square, Kyiv, Ukraine. Credit: Oleksandr Aleshchenko via Alamy.

The Road Ahead

“Ukraine 2036” is not a prediction. It is an organizing principle for decisions that must be taken now and a much-needed reminder that expedience in the present can come with a high cost in the future. Some bills will come due regardless, including for mine clearance, critical infrastructure replacement, veterans reintegration, and court staffing. They can be paid within a framework that reduces future risk, or they can be paid in conditions that sustain it. The choices outlined in these pages are the difference between those two paths. The outcome in 2036 will not be a surprise. It will be the sum of policies adopted in the next two years.

Europe’s choices will be judged by what is observable by the end of 2026. The West must commit now to establishing a steady cadence of training rotations with Ukrainian units, a functioning intelligence liaison that delivers actionable outputs, in-country maintenance capacity that keeps key systems in service, energy and rail nodes hardened to operate through disruption, and reconstruction projects planned and tracked through open data with credible civil-society oversight. In Kyiv, legislators must provide constitutional clarity on emergency powers and center-

local relations. Officials must also substantially complete judicial staffing, prepare for the first postwar elections to include internally displaced citizens and those abroad, and scale veterans services beyond pilot programs. None of these requires a formal peace. All are feasible under current conditions and less costly if done now.

In the chapters that follow, Kseniya Sotnikova addresses reconstruction and social cohesion. She begins with scale — needs measured in the hundreds of billions over a decade and mine contamination on a historic footprint — and treats reconstruction as a political-economy problem rather than a procurement list. Her recommended approach is radical transparency: Plan and deliver through open-data systems that allow citizens and donors to see priorities, contracts, and results; tie finance to governance benchmarks; consolidate donor efforts on a single coordination platform with Ukraine as an equal participant; triage where to rebuild and explain that triage publicly; link demining to labor-market policy and housing; and plan veteran rehabilitation and employment at scale to foster cohesion and fiscal stability in the early 2030s.

Uliana Movchan examines the political and legal architecture that will enable or impede recovery. Her focus is on translating wartime resilience into rules that withstand pressure: clarify emergency powers and civil-military boundaries; define center-local competences so necessary wartime practices do not harden into peacetime shortcuts; complete merit-based judicial staffing and protect independent anti-corruption bodies; and prepare for the first postwar elections under the proportional, open-list system adopted in 2020, with the administrative capacity to include internally displaced citizens and those abroad. The through-line is institutional credibility, without which finance is more costly and capture more likely.

Volodymyr Dubovyk sets out what a credible deterrence posture entails in practice. He argues that ad hoc aid and strategic ambiguity have reached their limit and that moving to an institutional footing requires permanent training with Ukrainian units, intelligence arrangements that make information actionable, logistics and maintenance support inside Ukraine, and systematic protection of energy, transport, and digital networks. The aim is to narrow the space for coercion while keeping civilian systems operating while under stress.

The resulting policy recommendations are clear. For Ukraine's government, near-term priorities include clarifying emergency powers and center-local relations; completing judicial staffing and safeguarding anti-corruption institutions; preparing for inclusive first postwar elections that preserve the 2020 electoral system; adopting and implementing a reconstruction law tied to open-data delivery and unified donor coordination; and treating demining, skills, and veterans policy as core security tasks. For Europe, the central task is to lead: Field a deterrent posture

with and inside Ukraine; harden critical infrastructure; scale defense production; finance at size while conditioning disbursements on transparent procurement and clean delivery; support plural media, watchdog groups, election administration for displaced voters, and independent election administration for displaced voters, and independent election observation consistent with EU standards; and staff for the long haul. For the United States, the role is to provide structural continuity with long-term compacts that pre-authorize support; deeper intelligence, cyber, and space cooperation; assistance aligned with governance benchmarks; and instruments that mobilize private investment alongside European finance.

The logic running through the volume is consistent. Defense credibility creates room for reform. Clean institutions translate that room into confidence. Transparent reconstruction turns confidence into growth and cohesion. Each component depends on the others. The practical implication for the coming period is to move on all three at once, even under wartime conditions, rather than serializing them. Many of the most important steps — clarifying emergency powers, completing judicial staffing, deploying open-data reconstruction systems, establishing routine training and logistics arrangements — are feasible now and are more effective if put in place before less transparent habits take root.

The decision Europe faces is not only about how to end a war; it is about the kind of European decade governments want to govern. Credible deterrence in Ukraine is the condition for pursuing other priorities with predictability. Failing to build it would turn those priorities into talking points. The path to the better 2036 runs through choices that can be specified and seen through, today.

Sociopolitical Developments in Ukraine

Kseniya Sotnikova

What's at Stake

Ukraine stands at yet another inflection point, where the level and continuity of international support will fundamentally shape its trajectory toward a secure and democratic future. Decisions made and policies launched now will define whether in the coming decade Ukraine becomes not a dependent state, but a valuable contributor to peace and security, as well as economic prosperity in the European and transatlantic communities.

If Ukraine is not robustly supported in its reconstruction and development, the risks of democratic backsliding and regional instability, including economic and migration crises, extend far beyond its borders. The points discussed below — from immediate postwar political challenges and reintegration of de-occupied territories to demographic challenges and reconstruction potential — will determine whether Ukraine faces prolonged instability and decline, with potential further spillover to its neighborhood, or develops as a resilient and prosperous democracy, sharing its innovations and welcoming mutually beneficial international development projects.

The State of Play

Immediate Postwar Challenge: Elections

The issue of holding elections in Ukraine has been high on the political and media agenda since early 2024, as the normal five-year terms for president and members of parliament would have expired last year. There is wide agreement that the constitution permits the extension of the powers of the Verkhovna Rada and president if their mandates expire during martial law, when indeed the law prohibits elections. Still, the end of the war and martial law will not automatically resolve the legal, administrative, and security challenges that have piled up during Russia's full-scale invasion of Ukraine. The success and legitimacy of the first postwar elections in Ukraine will set the tone for further democratic processes¹ in the country.

Ukrainian experts and politicians have already started discussing how to change the law to address the postwar challenges. Ukraine's dynamic civil society has developed its own vision for postwar elections, including territorial security audits, accessibility measures for displaced voters, and Electoral Code reforms. These efforts align with EU accession requirements as well as recommendations from the Organization for Security and Cooperation in Europe to strengthen electoral integrity against disinformation and cyber threats.

Ukraine Population Breakdown

Population as of December 2024, not including the temporarily occupied regions

■ Non-Displaced Population ■ Returnees ■ IDPs

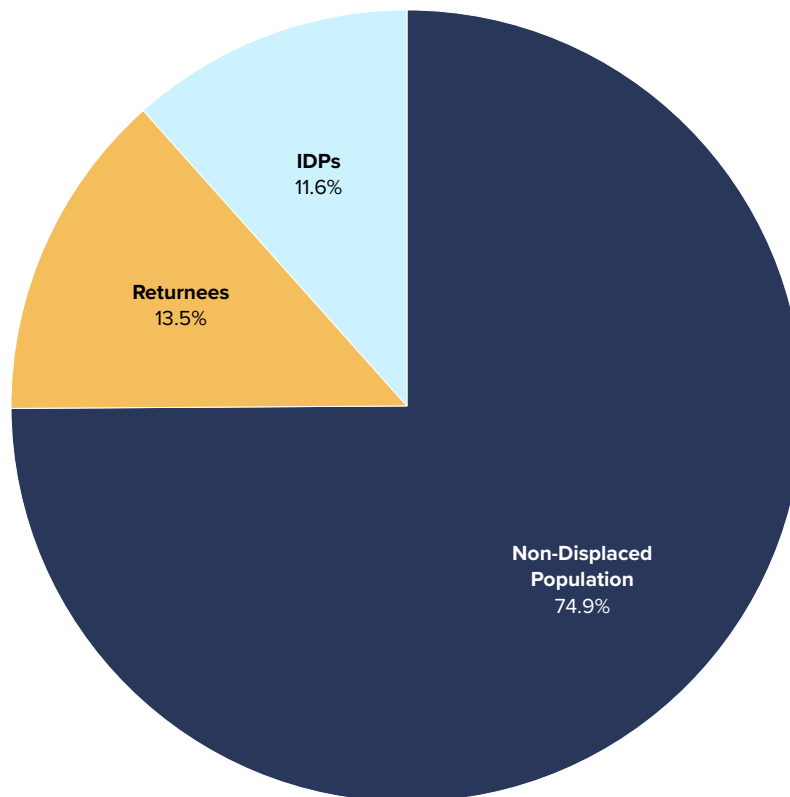


Chart: Center for European Policy Analysis. Source: International Organization for Migration.

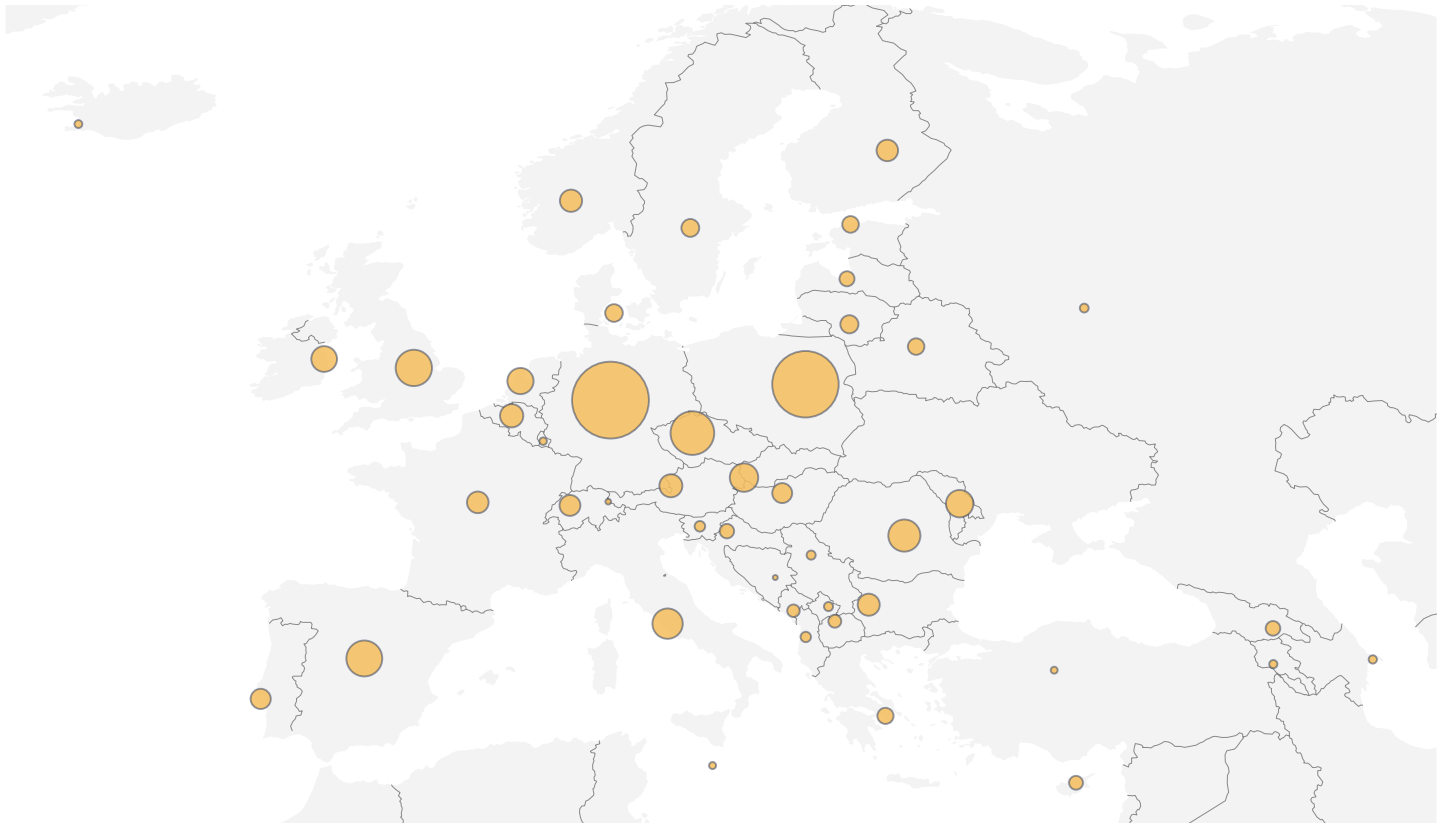
Reintegration and Transitional Justice Issues

Some Ukrainian territories have been under occupation for more than 10 years, some have been occupied since the full-scale invasion, and others have been liberated. Among the postwar tasks in reintegrating de-occupied territories will be identifying collaborators and holding them responsible, both for security reasons and to satisfy the public demand for justice.

Most Ukrainians sympathize² with their fellow citizens under occupation, viewing them as victims of circumstance who await the return of Ukrainian control. But they also demand punishment for certain groups, including law enforcement officers, politicians, and the military working for the occupying authorities. In postwar elections, voters will very likely demand to know if candidates from the de-occupied territories collaborated in any way.

Ukrainian Refugees in Europe

Ukrainian Refugees
Recorded.



Data accurate as of December 31, 2025. Data was jointly reported for Serbia and Kosovo. The joint figure has been divided equally between the two territories for mapping purposes.

Map: Michael Newton/Center for European Policy Analysis • Source: UNHCR Operational Data Portal for the Ukraine Refugee Situation.

Discussion of “transitional justice” has picked up since the adoption of a new legal framework in 2022. Although the law has gaps, lawmakers are reluctant to try to amend it, which would require them to make a compelling case that could balance the fears and hopes of disparate audiences, including people living and working in the occupied territories and internally displaced people.

Demography, Migration, Labor Market

Ukraine's population was shrinking even before the full-scale invasion, but since 2022 the situation has worsened. The country had 48.5 m people in 2001, 42 m in 2022, and 35.8 m in July 2024, including 31.1 m in places under complete control of the government.³

The International Organization for Migration estimates that more than 14 m people fled their homes during the first two years of Russia's full-scale invasion.⁴ Since then, some have returned from internal displacement or from abroad, although not necessarily back to their homes. Around 4.5 m are officially displaced inside the country and around 6.8 m remain abroad. This hemorrhaging of population and dislocation have deepened the country's labor shortage, constricting the economy's long-term potential.

Still, the labor market shows tentative signs of recovery, with unemployment gradually declining and businesses adapting to new realities. Women are training for traditionally male professions, such as truck drivers, and policies aim to bring veterans into the labor market. Ukraine has also recently begun allowing its citizens to hold multiple citizenships in another attempt to keep those Ukrainians abroad in the fold. But it is security and economic stability that will ultimately lure people back.

Reconstruction and Development

It will take \$524 bn over the next decade to rebuild Ukraine, according to a February 2025 assessment by the government, World Bank, European Union, and United Nations. That is about 2.8 times Ukraine's estimated nominal gross domestic product for 2024. The assessment puts direct damage in Ukraine at \$176 bn, up from \$152 bn the previous year.

Long-term reconstruction and recovery needs are the highest in housing (almost \$84 bn), followed by transportation (almost \$78 bn), energy and extractive industries (almost \$68 bn), commerce and industry (over \$64 bn), and agriculture (over \$55 bn). Across all sectors, the cost of debris clearance and management alone reaches almost \$13 bn.

In addition to trying to woo investments from international partners and the private sector, the country will need to deal with an unprecedented level of mine contamination and explosive ordnance.

Ukraine is now arguably the world's most mine-contaminated country, with 174,000 square kilometers, or nearly 29% of territory contaminated by landmines or explosive remnants.⁵ Nearly 139,000 square kilometers (53,670 square miles) affected, about a quarter of its territory.⁶ Mines continue to threaten lives, impede agriculture, and hinder reconstruction.

Meanwhile, Ukraine is streamlining reconstruction and recovery initiatives. It is investing in coordinating and bringing accountability to the unprecedented number of recovery projects under different leadership, including the government, the European Bank for Reconstruction and Development, and the G7. In a bid for transparency, the Ministry of Community and Territorial Development has developed a database to collect, organize, and publish open data on all stages of restoration projects in real time. In addition, the government has set up the State Agency for Infrastructure Restoration and Development as well as a platform mapping destruction and listing national recovery projects.⁷

The legal foundation is also improving. For instance, in June parliament adopted legislation that would make it easier to create public-private partnerships and would better protect investors, including in joint defense projects. One of its aims is to strengthen Ukraine's defense-industrial complex.

Human Cost: Civilian Victims and Veterans

About 300,000 people have been disabled to varying degrees by war-related injuries since 2022, bringing the total number of people with disabilities to more than 3 m. Only 16% of those with disabilities are employed, compared with over 50% in the EU. By various estimates, up to 100,000 people have lost limbs, putting immense pressure on health care and rehabilitation systems, and highlighting the need for barrier-free infrastructure and specialized professional training.

Ukraine is already expanding its rehabilitation infrastructure, including with the assistance of the international community, with programs to help veterans reintegrate professionally and psychologically. It has also adopted plans to create a nationwide barrier-free environment by 2030.⁸ These and other efforts, combined with international partnerships and a strong policy focus on inclusiveness, are a good start in addressing these issues.



Photo: Emergency Service remove the rubble at the maternity ward of the Vilniansk Multidisciplinary Hospital destroyed in a missile attack of Russian troops that claimed the life of a two-day-old infant, Vilnyansk, Zaporizhzhia Region, southeastern Ukraine. Credit: Ukrinform.

Critical Junctures

Most attempts to resolve critical needs and to establish long-term solutions require new laws. At the same time, Ukrainian civil society boasts a cadre of respected experts, enjoys access to the latest practical data across all sectors, and often has direct connections to lawmakers and government agencies with the leverage to translate their ideas into directives and bills. It follows, then, that closer cooperation between civil society and the authorities would improve the quality of proposed legislation and help ensure that new policies are grounded in the actual needs and experiences of citizens. For implementation, much of the responsibility will rest on the shoulders of the local authorities and communities (*hromadas*). Of course, international partners play a massive role in financing, technical and advisory assistance, and implementation oversight, especially in reconstruction and development efforts.

Immediate Postwar Challenge: Elections

Among the many issues outlined by the legal experts⁹ are the following:

- Ensuring that internally displaced people can vote. The official estimate of 4.5 m IDPs is almost certainly an undercount, which interlinks with the necessity to update information about voters, particularly the badly outdated State Registry of Voters.
- Ensuring that Ukrainians who have left the country can vote. Even before the full-scale invasion, polling stations abroad were overloaded. As of February 2025, 6.9 m refugees from Ukraine were recorded globally.¹⁰ Only 43% of refugees surveyed in December 2024 said they planned to return once it is safe to do so, compared with 74% in November 2022.¹¹ Even for those, return can be a lengthy process, leaving them still abroad when elections come around. The existing capacity of polling stations established at Ukrainian diplomatic institutions abroad will clearly not be enough to ensure a proper voting process.
- Dealing with the consequences of Russia's mining and shelling. The many destroyed and abandoned settlements and resulting voter migration, nonfunctioning administrations, or security threats to participants of elections and citizens in general mean elections cannot be properly held in some places. The number of voters per polling station in different regions will therefore change significantly, entailing systemic administrative revisions.
- Filling the legal gaps that could violate Ukrainians' constitutional rights, such as the right to run for office. For example, the permanent residency requirement for candidates in national elections would bar the millions who had to leave Ukraine since the beginning of the full-scale invasion, especially women who took their children to safety abroad.
- Providing the conditions for properly balanced campaigning. In March 2022, on the orders of the National Security and Defense Council, all national TV channels were consolidated into a round-the-clock information telethon called United News.¹² During the first months after the full-scale invasion, it effectively streamlined domestic communication and countered disinformation in an extremely volatile information environment. But now the situation has changed. Polls show the share of those who view the telethon format favorably has plunged from 45% in 2022 to 17% in 2024. In addition, 77% say that due to the lack of different viewpoints presented on the telethon, they seek information from other sources; 42% say there is media censorship in the country.¹³ It is critical to address the issue of media trust and create a competitive information environment for electoral campaigning.
- Ensuring security on voting day, mitigating the risks of Russian provocations.

Reintegration and Transitional Justice Issues

In Ukraine, “collaboration activity” was formally criminalized in March 2022, but the law lacks a clear distinction between those who deliberately cooperate with the occupiers and those who have become hostages of circumstances. One recent analysis¹⁴ found that prosecution for collaboration does not properly consider the context of the occupation or the need to survive in the occupied territory and is based on a rather formal assessment of the actions of the accused. International human rights groups have repeatedly warned about flaws in the law’s text and enforcement. In response, lawmakers have proposed at least 13 amendments, but all remain pending. It is difficult for officials to move forward and communicate the amendments simultaneously to those in the occupied territories and the rest of the Ukrainian population. Nor can Ukraine look to the examples of postwar Europe, where efforts to bring collaborators to justice raised their own issues of culpability, rights, and social cohesion.¹⁵ Ukraine will have to invent its own solution, to ensure both justice and social cohesion.

Demography, Migration, Labor Market

The demographic crisis in Ukraine has two key dimensions: quantitative and structural.

Quantitative aspect. The UN projects that the population of Ukraine will increase to 39.54 m by 2026, after which it will fall to 15.3 m by 2100.¹⁶ It’s perhaps an overly grim vision that assumes Ukraine takes no measures to stop the demographic slide, but the general trend is still extremely worrisome. The Ukrainian Institute of Demography projects that the country’s population could drop to approximately 30 m by 2037.¹⁷

Structural aspect. The share of younger people in Ukraine is rapidly declining, as the share of the elderly grows. According to government figures, the average age of Ukrainians has risen from 41 before the full-scale invasion to 45. In addition, for every person of pensionable age in Ukraine there is only one working person, compared with the EU average of 2.7 in 2022, with a forecasted decline to approximately 1.5 in 2100.¹⁸ This crisis will only get worse, considering that 60% of the people who have left (and keep leaving) Ukraine are of working age, and 20% are children who will enter the labor market in 10 to 15 years. Notably, at the end of August 2025 the government began¹⁹ allowing male citizens ages 18 to 22 — not yet old enough for the draft — to travel abroad during martial law. The Polish Border Guard counted about 10,000 young Ukrainian men entering Poland during the first week after these changes went into effect.²⁰ As of the end of October, the figure has reportedly almost reached 100,000.²¹ The initial goal of the Ukrainian authorities was to prevent families from taking teenagers abroad before they

reached the conscription age, and let them proceed with the education in Ukraine. President Zelenskyy emphasized that young people who graduate in Ukraine have a much greater chance of returning after leaving than those who receive education abroad.²² However, this policy change has rather allowed a massive outflow of young Ukrainian men to Europe.

Kyiv's initial goal was that by giving young people more freedom to leave, it would encourage them to return and voluntarily join the Ukrainian Armed Forces later.

As of December 2024, 6.8 m Ukrainians were registered as refugees abroad, with 5.5 m outside Russia and Belarus (for now, there is little possibility to collect data on refugees in RU and BY).²³ The largest age group among refugees continues to be women ages 35 to 44, the majority of whom, 54%, left Ukraine with their children. Children make up 29% of Ukrainian refugees. The proportion of adult men among refugees increased to 27%, up from 18% in January 2024.

There is a separate issue of Russia stealing Ukrainian children. Tens of thousands²⁴ of children have already been taken from occupied areas of Ukraine to Russia, including for further adoption, a war crime that continues. Notably, the first arrest warrant against Vladimir Putin was issued by the International Criminal Court for unlawfully deporting children and unlawfully transferring children from occupied areas of Ukraine to the Russian Federation.²⁵ It is crucial to continue the coordinated international efforts aimed at bringing the children back, reuniting them with their families, and ensuring their proper psychological recovery.

Ukraine seems to lack a coherent and feasible strategy for appealing to its citizens abroad. One effort to do that, the creation of the Ministry of National Unity of Ukraine in late 2024, was met with widespread skepticism. It failed to communicate effectively with Ukrainians who had left the country or work well with the political leadership of partner countries hosting Ukrainian refugees. Following a government reshuffle in July, it merged with the Ministry of Social Policy into a renamed Ministry of Social Policy, Family and Unity.²⁶

The government also needs to move forward on its Demographic Development Strategy 2024-2040, prioritizing concrete deliverable programs.

Ukraine's labor market, is experiencing serious turbulence, with mass migration of workers and ongoing mobilizations only two of the factors. By the end of 2024, the unemployment rate was 14.3%, but by April 2025 it had declined to 12.1%, the lowest rate since the start of the full-scale war in February 2022, when it stood at 8.6%.²⁷

The economic implications of the recent decision to let men ages 18 to 22 leave the country are yet to be evaluated. However, as they did not need any reservation from conscription by their employers, the people who still remain in the country would



Photo: Kyiv, Ukraine – March 14, 2022: Destruction of an apartment building in Kyiv, Ukraine. The result of the war between Russia and Ukraine. Credit: Oleksii Sergieiev via Alamy.

be willing to work at the enterprises not listed as “critically important”, including the smaller businesses. According to the data as of mid-September, 37% of employers faced layoffs of men ages 18 to 22.²⁸

The unemployment rate among IDPs is higher than across the general population. There are more than 4.5 m registered IDPs in Ukraine, 42.3% of whom are of working age. Out of them, only about 40% are employed. They not only face employment issues, but many had homes that were destroyed or are located in heavily mined areas. Twenty-two percent of the country’s homeless populations consists of internally displaced people.²⁹ During Russia’s full-scale war against Ukraine, about 4 m people have lost their homes.

It is important to address the housing crisis, as well as expand employment opportunities, especially for youth, women, and pensioners, and find ways to support businesses.

Ukraine also needs to develop proper regulatory mechanisms for attracting, registering, and integrating workers from other countries to fill the growing gaps in the labor pool.

Reconstruction and Development

A stretched labor market could hamper the speed and quality of reconstruction and development effort.

In addition, tough political decisions lie ahead. Reconstruction of destroyed settlements must be a cornerstone of the country's recovery plans, as difficult as it may be to rebuild homes and towns from scratch. As Ukrainian authorities make tough decisions over which settlements to prioritize, they must determine how to engage in careful, honest dialogue with publics about their critical reconstruction decisions.

Officials will also have to woo and reassure potential investors. In a recent survey, 79% of foreign investors who had previously expressed some interest in Ukraine are interested in opportunities related to the country's recovery.³⁰ Those ready to enter the market before the end of the war are most attracted to construction and reconstruction, services, and infrastructure, but they named the following as the biggest barriers to investment:

- Security — 68%
- Corruption or lack of transparency — 47%
- Political uncertainty and weak institutions — 47%
- Issues with the rule of law — 34%
- Currency restrictions — 25%

Officials will need to address investors' concerns as soon as possible.

NB: In May 2024, a draft law "On the key principles of the reconstruction of Ukraine" was presented by the Ministry for Development of Communities and Territories of Ukraine.³¹ It was not registered in the Parliament yet.

Human Cost: Civilian Victims and Veterans

Ukraine has 1.2 m veterans, and the figure is growing. Their rehabilitation, reintegration, and retraining will remain a pressing issue. The Minister for Veterans Affairs estimates that by war's end, the number of people with veteran status plus their family members eligible for veterans benefits could reach 5 m. The government needs to prepare for this crush by seriously expanding the system's capacity.

Both veterans and civilians affected by the war need help in their return to normal life and the labor market. They face barriers to employment and social reintegration due to disabilities, workplace inaccessibility, and the stigma against mental illness or trauma. They urgently need psychological support, professional retraining, and public campaigns to change perceptions about hiring veterans and people with disabilities.

Ukraine 2036: How Today's Investments Will Shape Tomorrow's Security

*NB: On August 25th, the Parliament registered a draft Law “On the Basic Principles of State Veteran Policy [***]”³², which proposes to determine at the legislative level the goal, objectives, and principles of state veteran policy, the legal status of veterans, veterans with special merit to the Fatherland, their family members, and family members of the deceased Defenders of Ukraine, and to establish the types of support provided to these categories of persons to ensure their dignified life, honor, and respect in society. The bill has been developed within the implementation of the Veterans Policy Strategy for the Period Until 2030. It is yet to be approved by the Parliament.*

As it works on an updated, comprehensive veterans policy, the government needs to address more immediately problems of understaffing, staff turnover, and limited funds at the Veterans Ministry.

Russian “Re-Education” Camps

Locations where Ukrainian children have been taken for ‘Russification’ purposes.



Map: Center for European Policy Analysis • Source: Regional Center for Human Rights, National Endowment for Democracy.

The Cost of Failure

Postwar Elections

If poorly managed, Ukraine's first postwar elections could undermine social cohesion and public trust in elected officials. Logistical and organizational constraints mean that millions of Ukrainians abroad could be deprived of their constitutional right to vote, as could IDPs if voter registries are not updated in time. In addition, there might be issues with the participation of the military in the electoral process—even when active hostilities cease, servicemembers will continue deployment near the state border with Russia. Thus, large segments of the population would feel neglected and disengaged, and might understandably question the legitimacy of the electoral process and, ultimately, of those elected.

This would create an opening for anti-Ukrainian propaganda before, during, and after the elections. With its long history of exploiting gaps in democratic processes through disinformation, Russia would likely seize the chance to delegitimize Ukraine's leadership both domestically and internationally, potentially making it harder for Ukraine's international partners to make the case for supporting Ukraine to their own people.

In addition, without proper preventive measures, the electoral machinery could become a target for cyberattacks, including data breaches, manipulation of results, and disruption of election infrastructure and logistics.

It is also worth mentioning that any new Ukrainian parliament will likely shift away from the focus on new faces that brought to power the president's Servant of the People party and allowed it to form a single-party majority there, and toward the armed forces and volunteers, who particularly enjoy public esteem right now.³³ But given that achievements among the military and volunteers do not necessarily translate into political and policy expertise, ...

*NB: In Ukraine, the term "volunteer" refers to "all civic networks that help supply the army and accommodate internally displaced persons, etc. [...] In the first period of the war, volunteers collected money donated by millions of people, bought bulletproof vests, first aid kits, thermal imagers, boots, uniforms, and food, and then delivered it to the front line. Without volunteers, many volunteer fighters would have been hungry and unequipped in the first months of a full-scale war. Nowadays, volunteers are supporting the state supply chain and taking care of those areas where the state cannot cope. For example, this is clear regarding the supply and repair of vehicles, which in modern warfare are simply expendable and live on the battlefield for a few days. [...] It is no coincidence that the volunteer movement enjoys the highest level of public trust in Ukraine."*³⁴

However, the issue of professionalism could remain relevant, as representatives from the military and volunteer sectors - despite the previous high achievements in their respective fields that brought them the public support - may lack the necessary political and legal background and expertise required for effective parliamentary work. Further, there are limitations for eligibility to run for office, disqualifying many refugees and diminishing the pool of good candidates.

Reintegration and Transitional Justice Issues

Ukrainians are demanding justice for wartime crimes and transgressions. Any delays in providing a clear legal framework and properly explaining it to various audiences — including those in the occupied territories, those living under Ukrainian control, and the international community — could allow grievances to fester, sowing division and endangering the process of reintegration.

Russia is already exploiting the ambiguity of Ukrainian laws on this issue, triggering the fears of people living and working under the occupation that they could face harsh prosecutions should the Ukrainian authorities regain control. Russia will also use any specific cases to further try to discredit the Ukrainian authorities, appealing to the Russian population, the people living in occupation, and the international community with claims of violations of international law, particularly in human rights.

In addition, a lack of proper vetting procedures and accountability could open the door to collaborators appearing on the ballot come election day.

Demography, Migration, Labor Market

The share of Ukrainians who live abroad and plan to return is steadily shrinking. Most recently, it was 43% surveyed, down from 52% in January 2024 and 74% in November 2022. Only 20% of respondents are certain that they will return. The longer the war continues, the more Ukrainians will adapt to living abroad and the more civilian infrastructure will be so damaged that many will have no home to return to.

Ukrainians who plan to return are largely undecided about the timing, meaning host countries could have to shift from temporary to long-term integration strategies and even deal with a rise in people living there illegally after assistance programs have expired. The potential additional pressure on housing and social services could in turn sow public resentment in those countries.

In Ukraine itself, the Kyiv School of Economics projects that the unemployment rate will continue to slide to about 10% by the end of 2027, reflecting a gradual labor market recovery.³⁵ With this cautiously optimistic data, businesses still face a growing deficit of skilled workers, especially as mobilization removes critical staff from the workforce. As of August 2024, according to the Advanter marketing and consulting



Photo: Women using a mobile phone seen in a gym where internally displaced persons have been placed in Lviv amid Russian invasion of Ukraine. Credit: Mykola Tys via Alamy

firm, businesses lacked about 26% of the specialists they needed. KSE reports that the share of businesses experiencing labor shortages due to conscription and/or employee departures grew from 49% in May 2024 to 63% in August 2024, where it has stabilized.³⁶ The structure of the labor market is also changing: The share of women is growing, including in what had been traditionally considered men's professions.

In parallel, the shadow labor market is increasing, as more men skirt the requirement to register with military authorities and enlistment offices in order to qualify for official employment.

At the end of 2021, Ukraine's labor force was 17.4 m people.³⁷ By May 2023, it had lost more than 30% of those workers to mobilization, occupation, and emigration, according to estimates by the Confederation of Employers. Various assessments say Ukraine will be short 3 m to 4.5 m of the workers it would need to be economically sustainable by 2030.

Reconstruction and Development

A continuing shortage of qualified workers alongside the continued growth of the shadow economy would further hobble businesses, reduce tax revenues and social security contributions, and ultimately slow GDP growth, as international agencies are already forecasting.³⁸ Ukraine's postwar recovery and its ability to attract investment would suffer.

A pressing labor shortage could also increasingly spur businesses to turn to unregistered workers from third countries. Without proper regulation, unregistered foreign workers are vulnerable to exploitation and abuse, and their presence can complicate law enforcement and migration policy. It is important to update existing policies to head off trouble here.

Failure to address the concerns of potential investors and the lack of a clear legal framework, including permitting procedures, could choke off private foreign funds needed for reconstruction. Given the tremendous losses Ukraine has already suffered, that would risk further economic stagnation and decline. Ukraine would lose the chance for rapid economic recovery and modernization and be less competitive on the world market. It would also have fewer new jobs, further fueling labor migration.

If Ukraine fails to attract direct investments it will have to cover its deficit with external loans or other forms of support, making it more dependent on foreign aid.

Finally, officials' inability to attract foreign investments, especially due to reputational or political factors such as issues with the rule of law, could feed public frustration.³⁹ That would create fertile ground for Russian campaigns to undermine social cohesion and trust in the current administration.

Human Cost: Civilian Victims and Veterans

Ukraine is already developing projects to ease the reintegration of veterans, but they are unequal to the demand. Inadequate support for the millions of veterans and their family members who will need help will leave many struggling with physical disabilities, psychological trauma, and social isolation. The result could be frustration and marginalization, undermining national unity and social stability. Lack of proper (re)training for veterans and their potential employers could mean lower productivity and more pressure on the state support system from people who otherwise would be willing and able to provide for themselves.

Working groups of the Veterans Affairs, Health, Social Policy, and Defense ministries have come up with ideas for helping those affected by the war to transition into regular civilian life, but rather than coordinating their appeals to potential donors

they are promoting their own projects. These efforts should be streamlined to avoid the ineffective distribution of resources.

Without international support, Ukraine's economy will stagnate, making proper recovery virtually impossible and leaving Ukraine vulnerable to further Russian aggression, creating immediate security risks for all of Europe.

Russia has destroyed homes, energy infrastructure, and other facilities providing essential services for the population. Left unaddressed, that destruction will cause deeper poverty and could spur social unrest and further waves of emigration internationally, only without the state and public support in the hosting countries during Russia's full-scale invasion.

In other words, if not supported immediately in its recovery, Ukraine could become a source of instability instead of being a contributor to the regional and global economy and security.

Strategic Recommendations — Way Forward Toward Ukraine 2036

- Ukraine's development toward a successful economy in the coming decade requires designing and implementing the policies now, before the end of the war. It will take coordinated action on demographics, the economy, legal reforms, and international cooperation. The Ukrainian authorities need to streamline and redouble efforts to ensure safe conditions, economic opportunities, and inclusive policies to encourage return, attract investment, and rebuild a resilient society.
- It is crucial to ensure proper security and a legal and administrative framework for the first postwar elections in Ukraine, including for citizens living abroad. International partners should not push for these elections until these criteria are met.
- Whether Ukrainians abroad return home depends on whether they can be safe and ensure a decent living for themselves and their families, on the one hand, and whether host countries will be willing to further integrate them into the workforce, on the other. Officials must bear both in mind when developing incentives for Ukrainians to return, along with the possibility that after martial law is lifted, more men could leave Ukraine, especially to unite with their families who by that time will have settled in the host countries. While parliament recently adopted legislation to allow multiple citizenship as one way to accommodate those who have acquired citizenship abroad, it is unclear whether this will effectively attract refugees to return to Ukraine.

- In parallel, to shore up a shrinking workforce, officials should tailor immigration policy to attract talented foreigners, offering clear domestic and international explanations of the policy both to address the concerns of Ukrainians and to manage the expectations of potential migrants to Ukraine.
- Officials should also do better outreach to IDPs, pensioners, and veterans to bring them into the labor market. International assistance in retraining programs could be extremely helpful here.
- Postwar Ukraine would offer tremendous opportunities for reconstruction and recovery projects. According to the World Bank, 13% of the country's housing stock has been damaged or destroyed, affecting more than 2.5 m households, and Ukraine will not be able to address this huge crisis without the help of foreign capital. By various calculations, the construction industry alone might provide up to 10% of Ukrainian GDP, compared with 3% before the war. That would mean jobs, investment, and a more resilient state. The government has launched a program that includes rent subsidies, compensation for ruined homes, and easier mortgages, but state capacity is no match for the demand.
- Ukraine needs a systematic remapping of areas of economic activity, to be clearly communicated both domestically and for potential foreign investors. Given the general destruction, mining of territories, the consequences of the destruction of the Kakhovka Dam, and massive damage to the energy infrastructure, economic activity have shifted away from risky regions to safer ones, mostly in the west. Still, officials will need to work on more equitably spreading around economic activity after the war.
- Officials will face tough choices on which villages, industries, and other targets to rebuild. These decisions need to be made in open dialogue with society and the business community.
- Dialogue with countries and foreign investors that have already expressed interest in the reconstruction of specific cities and regions should be more coordinated and streamlined. Agencies also need to be more coherent in negotiating with potential donors to avoid duplication of requests and fill gaps instead.
- To promote investments, Ukraine needs clear policies of risk insurance, an anti-corruption infrastructure that inspires confidence, clear and streamlined permitting procedures, and mechanisms for easier cooperation between foreign businesses and local partners, among other measures.
- On veterans policy, Ukraine should keep working closely with its international partners. Its new law outlining the basic principles of its veterans policy is a requirement of the EU's Ukraine Facility, which offers wartime support. Further, the implementation of a comprehensive veterans policy and a system of return to civilian life is an early requirement of NATO's comprehensive assistance package for Ukraine.



Photo: Participation of Kaja Kallas, High Representative of the Union for Foreign Affairs and Security Policy and Vice-President of the European Commission, in the Diplomatic Conference on the Convention Establishing the Claims Commission for Ukraine. Credit: European Commission.

- Although the end of war will shift the national agenda toward reconstruction and development, security will remain central. Ukraine will need to continue developing its military capabilities and defense industry, while the civilian security sector will play a decisive role in safeguarding communities, maintaining stability, and ensuring the rule of law. Veterans' experience could be equally valuable for civilian security agencies.
- Ukraine will be forced to innovate and adapt, while reforming according to EU requirements. The consequences of the war will dictate many nuances: that the rebuilt cities are barrier-free, that Ukrainian specialists in orthotics and prosthetics have cutting-edge expertise, and that recovering industries be more productive with a smaller workforce. Ukraine could rebuild into a modernized economy, including in its defense sector, which is already demonstrating groundbreaking solutions.
- To be in good shape by 2036, Ukraine has a lot of work to do, but true success will depend heavily on cooperation with international partners. A united effort to ensure Ukraine's security will be critical to European and transatlantic security. Ukraine is already confidently shaping up to be an asset to both EU and NATO, including as a skilled and reliable security contributor.

Political and Legal Developments in Ukraine

Uliana Movchan

What's at Stake

Ukraine's democratic trajectory stands at a critical crossroads that will define not only its own future but the broader architecture of European security and democratic governance in the 21st century. The country's ability to consolidate its democratic institutions will determine whether it emerges as a secure and democratic European state or remains trapped in a cycle of fragility and external vulnerability. The stakes extend far beyond Ukraine's borders: Success in supporting Ukraine's democratic consolidation will create a transformative model for resilient democracy under extreme pressure, while failure risks the emergence of a fragile state that becomes a source of instability for the entire region.

As the World Bank (in 2022) has emphasized, promoting democracy requires a comprehensive approach that strengthens the separation of powers, ensures inclusive and pluralistic governance, and empowers subnational institutions through decentralization.⁴⁰ In fragile and postconflict settings, decentralization serves as a critical tool for state- and peacebuilding by redistributing power and resources in ways that open political space, reduce monopolization by dominant parties, and foster political competition and pluralism. The European External Action Service (2020) has further stressed that democratic consolidation depends on bolstering institutional integrity through the independence of the judiciary, robust parliamentary systems, anti-corruption measures, active civil society engagement, and the expansion of e-governance mechanisms to promote transparency and accountability.⁴¹

Three interconnected pillars will shape Ukraine's path toward a secure and democratic European future, each reinforcing the others in a complex structure of institutional interdependence. First, democratic consolidation through strengthened institutions, rule of law, and pluralistic governance will provide the foundation for long-term stability and European integration. The resilience of Ukraine's democratic institutions during the full-scale invasion demonstrates their potential, but consolidation requires sustained support to transform wartime adaptations into permanent democratic structures. Second, successful postwar reconstruction guided by transparent, accountable governance will demonstrate that democratic institutions can deliver tangible benefits to citizens while resisting corruption and power capture. The scale of reconstruction needs — estimated in the hundreds of

Ukraine Corruption Perceptions Index

2012-2024

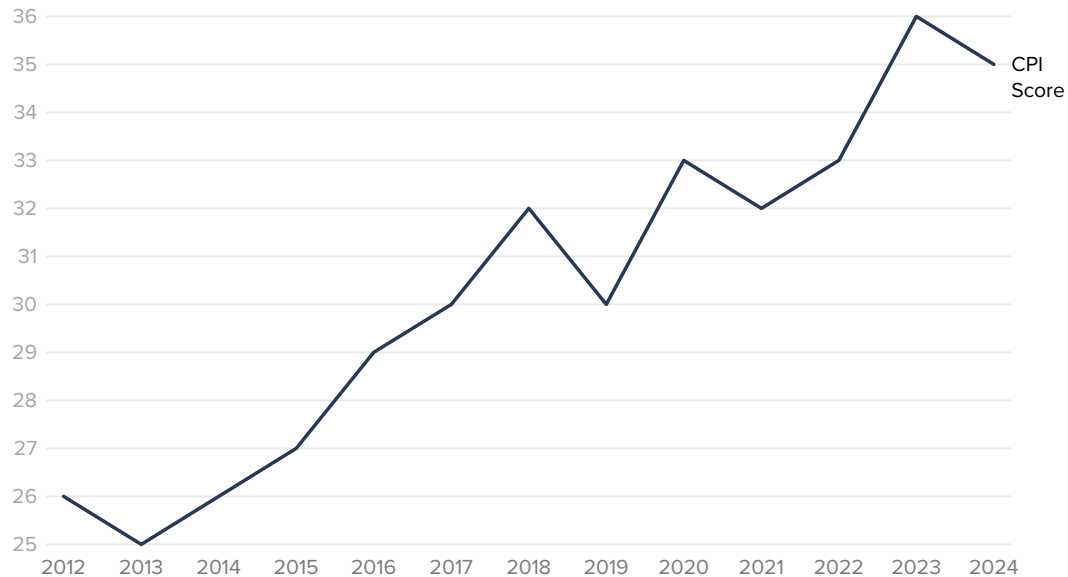


Chart: Center for European Policy Analysis. Source: Transparency International.

billions of dollars — creates both opportunities for democratic strengthening and risks of power capture that could undermine decades of progress. Third, robust security arrangements supported by strong democratic institutions will safeguard Ukraine's sovereignty while maintaining civilian control over military affairs and preventing the militarization of society that often accompanies prolonged conflicts.

The current moment represents a unique window of opportunity. Ukraine's democratic institutions have proven their resilience under the most extreme conditions, international attention and support are at historic highs, and the country's European integration aspirations provide a clear framework for institutional development. But this window of opportunity will not remain open forever. When the immediate crisis passes, international attention may decrease, domestic political pressures may shift priorities away from institutional reform, and the massive reconstruction effort may create new opportunities for corruption and power capture. The decisions made now will determine whether Ukraine seizes this historic opportunity for democratic transformation or allows it to slip away.



Photo: Ukrainian soldiers parade at a ceremony during a working trip to Kharkiv region by President Volodymyr Zelenskyy. Credit: President of Ukraine.

The State of Play

Despite the devastation and disruptions caused by Russia's full-scale invasion, Ukraine's democratic regime has endured. Freedom House continues to classify the country as "partly free," the Bertelsmann Transformation Index deems it a "defective democracy" with an upward trend by 2022 (7.1), and the Economist Intelligence Unit classifies it as a "hybrid regime" with some decline (5.81 in 2020 to 4.9 in 2024) (see Table 1). The continuity of these ratings amid war underscores that Ukraine has resisted authoritarian backsliding, in large part due to local governance structures enabled by decentralization — and because Ukrainian society continues to express a strong preference for democratic governance, even under conditions of existential threat.

Table 1. Democracy Index in Ukraine 2020-2024

	2020	2021	2022	2023	2024
Freedom House ⁴²	62/100 Partly free	60/100 Partly free	61/100 Partly free	50/100 Partly free	49/100 Partly free
Bertelsmann Stiftung Transformation Index (BTI) ⁴³	6.9 Defective democracy	N/A	6.8 Defective democracy	N/A	7.1 Defective democracy
Economist Intelligence Democracy Index (EIU) ⁴⁴	5.81 Hybrid regime	5.57 Hybrid regime	5.42 Hybrid regime	5.06 Hybrid regime	4.9 Hybrid regime

Decentralization has played a pivotal role in this resilience. As the World Bank has emphasized, decentralization in postconflict societies is not merely an administrative reform — it is a fundamental restructuring of political and institutional power (World Bank, 2022). By redistributing authority across levels of government, decentralization breaks the monopoly of central elites, boosts political competition, and fosters pluralism. In Ukraine, decentralization has served precisely this purpose. It has empowered local authorities, created new channels of democratic participation, and ultimately contributed to societal resilience in the face of war.

Since 2014, Ukraine has implemented one of the most ambitious decentralization reforms in Europe. More than 10,000 fragmented local councils were amalgamated into around 1,400 *hromadas*, each with direct fiscal authority and administrative responsibility. Local governments now manage a substantial share of public investment and play an essential role in the delivery of education, health care, and infrastructure. Local elections in 2020 embedded democratic legitimacy at the grassroots level. This transformation has not only streamlined service delivery but also significantly shifted the country's vertical power balance. Regional state administrations, formerly extensions of presidential power, ceded some of their influence to empowered local councils and elected mayors. This institutional shift proved critical when Russia launched its full-scale invasion in 2022. Local authorities, now equipped with greater autonomy, emerged as key actors in managing wartime logistics, territorial defense, and the distribution of humanitarian assistance. They coordinated with military administrations, supported displaced populations, and continued delivering services in partially occupied territories. Their performance demonstrated that decentralization was not just a reform — it had made the state more functional.

However, the war also disrupted the balance between autonomy and oversight. Amendments passed between 2022 and 2024 allowed for the delegation of local authority to military administrations in areas where local governments could no longer operate. In many regions untouched by active combat, mayors gained enhanced powers, issuing appointments, reallocating budgets, and making executive decisions with minimal council involvement. While this expedited crisis response, it also weakened traditional checks and raised concerns about over-centralization and potential corruption. By 2023, some oversight was restored as military administrations began monitoring mayoral actions more closely, but the system remained improvised and legally ambiguous (Brovko 2023).⁴⁵

At the same time, the war has redefined civic participation at the local level. Many local governments maintained inclusive approaches to wartime problem-solving, especially involving internally displaced people and expert communities. But they engaged less with nongovernmental organizations and more with entrepreneurs, whom they perceived as more capable partners due to their resources. This pragmatic orientation reflects both wartime necessity and structural dependence, but participation also became more politicized: By 2024, 32% of local governments reported difficulty resisting pressure from interest groups, up from 21% in 2021. Reconstruction planning in particular became contested, as local elites or opposition groups sought to capture public processes for private or political gain. These developments signal both the strength and fragility of local democracy under stress (Keudel et al. 2024).⁴⁶

Rule-of-law developments reflect both wartime constraints and reform momentum. One of the most significant achievements is the revival of judicial reforms long stalled before the full-scale invasion. Ukraine restructured two key institutions: the High Council of Justice and the High Qualification Commission of Judges. These reforms were implemented with national and international participation, including integrity checks for members. Civil society had long demanded these changes, but only under wartime conditions — driven by the urgency of EU integration and sustained political will — did they finally move forward. The liquidation of the Kyiv District Administrative Court (KDAC), one of the country's most notorious judicial bodies, symbolized a break from entrenched judicial corruption.⁴⁷ Although institutional challenges remain, especially in capacity and transparency, these reforms show that Ukraine can turn crisis into momentum.

Even during martial law, Ukraine's judiciary has preserved legal continuity. Courts continue to function, transferring jurisdiction from conflict zones to safer regions and trying to introduce online proceedings to ensure access to justice for displaced populations. Martial law has not been used to create exceptional courts or bypass constitutional protections, an important marker of democratic restraint. While more than 100 court buildings have been damaged and many judicial positions remain unfilled (up to 60% in some instances), the judiciary has upheld its independence in critical areas, including high-level corruption cases.⁴⁸

Notably, anti-corruption institutions have operated with increasing autonomy. In 2023, the head of the Supreme Court was arrested on suspicion of accepting a \$2.7 million bribe, in an operation conducted by the National Anti-Corruption Bureau (NABU) and the Specialized Anti-Corruption Prosecutor's Office (SAPO); more recently, in November 2025, NABU and SAPO exposed a high-level criminal organisation in the energy sector in *Operation Midas*, uncovering a large-scale kickback and money-laundering scheme involving state nuclear company Energoatom, senior officials, and a "back-office" laundering network that reportedly processed some USD 100 million.⁴⁹ That these cases emerged under wartime conditions are strong signals that accountability is becoming institutionalized, not merely political. The ratification of the Rome Statute in 2024, after years of delay, has also strengthened the legal architecture for prosecuting war crimes and improving cooperation with international courts. However, this progress was temporarily called into question after parliament adopted legislation that weakened the independence of NABU and SAPO, triggering strong criticism from civil society and international partners. Widely perceived as an attempt to erode institutional safeguards, the law altered key procedures for leadership appointments. Following public backlash and international pressure, the president reversed course, and parliament ultimately supported legislation to restore the independence of NABU and SAPO. The episode revealed not only the political sensitivity of anti-corruption efforts, but also the strength and importance of these institutions. The intensity of the response — from civil society, international actors, and reform-minded officials — highlighted the extent to which NABU and SAPO have come to serve as effective pillars of Ukraine's anti-corruption system.

Another area of transformation is the reduction of oligarchic influence. Ukraine's "de-oligarchization" law, adopted before the war, was enforced during it. The legislation restricts individuals who meet several criteria, such as owning media, financing parties, or having monopolistic power, from participating in public sector privatization or political financing. In response, many media owners relinquished those assets in 2022. The arrest of Ihor Kolomoisky and legal actions against other oligarchs represent an erosion of the informal political economy that shaped Ukrainian governance for decades.⁵⁰ While these developments arise partially from wartime expediency, they have created space for democratic institutions to regain relevance.

Ukraine's progress in promoting pluralism and inclusion stands out as a remarkable aspect of its democratic resilience. Despite the existential threat of war, the country has expanded political representation and safeguarded minority rights. Gender equality has made noticeable progress, driven by both institutional reforms and women's vital roles in wartime resilience. Women's parliamentary representation jumped from 8% in 2007 to over 20% after the 2019 elections, partly due to the

Gender Breakdown of Leadership Positions in Ukraine (2025)

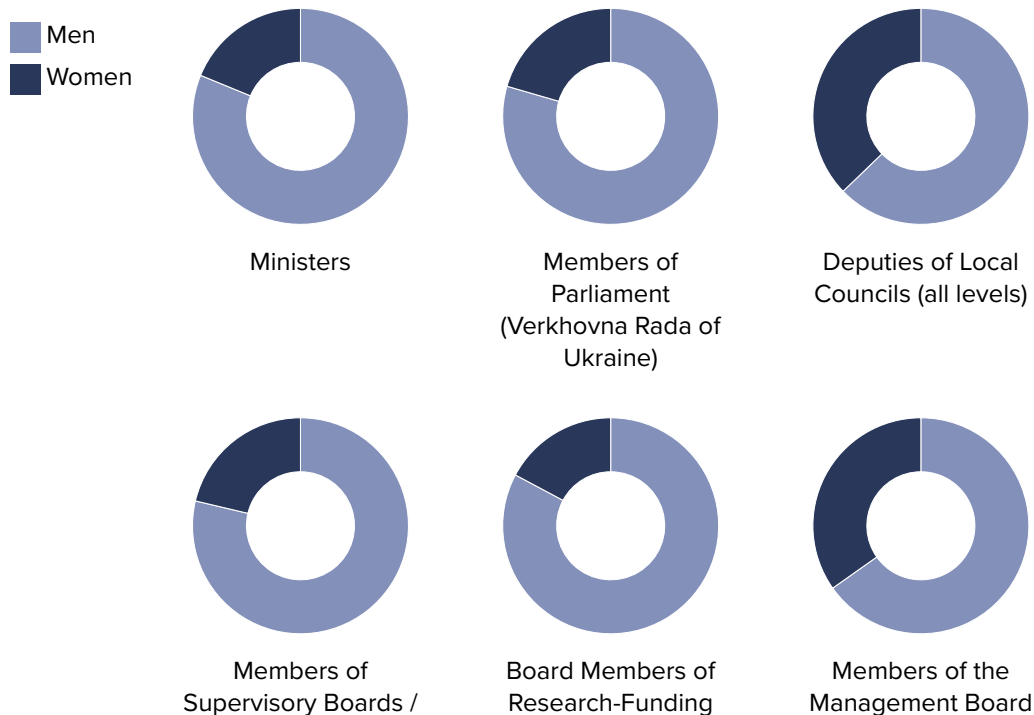


Chart: Center for European Policy Analysis. Source: European Union.

40% gender quota on party lists. Women now hold five of 21 ministerial posts and three of five deputy prime minister roles. Locally, women occupy more than 35% of leadership positions, exceeding 40% in smaller communities, showing how decentralization fosters female political engagement.

The war has also reshaped gender roles. The armed forces now include 67,000 women, with more than 10,000 in combat roles previously closed to them.⁵¹ Women lead 22% of Ukraine's diplomatic missions, a sign of their growing prominence in international affairs. These changes signal not just numerical gains but deeper shifts in societal views on women's capabilities. At the same time, structural inequalities persist. Men's median wages are still 18.6% higher than women's for the same work, and women continue to face barriers in majoritarian elections, party financing, and access to senior positions.⁵² Party-list quotas are often observed in name only, with women placed in unelectable slots. Residency requirements for candidates also disproportionately affect displaced women who care for children and the elderly abroad.

Ukraine has also made progress in protecting ethnic and linguistic diversity. The 2023 Law on National Minorities reaffirmed the right to use EU-recognized minority languages, including Crimean Tatar, in education, media, and political campaigning. Specific provisions exempt Crimean Tatar and other minority-language publishers from restrictive quotas on Ukrainian-language content. This law marks a major step in codifying cultural pluralism, even as restrictions remain in place for Russian, deemed the language of the aggressor state. Importantly, ethnic and religious tensions have not escalated during the war. Despite some political friction, especially regarding the Ukrainian Orthodox Church (Moscow Patriarchate), religious freedom remains protected under a liberal constitutional framework.

The situation of LGBTQ+ citizens remains more fragile. In 2024, Ukraine placed 40th of 49 European countries for LGBTQ+ rights in ILGA-Europe's rankings.⁵³ While the government has taken steps to guarantee equal access to health services regardless of gender identity or sexual orientation, there is still no specific anti-discrimination law to protect LGBTQ+ people.

A central barrier to political pluralism in Ukraine is the weakness of its party system. While formally multiparty, the system remains fragmented, volatile, and dominated by personalized or clientelist structures. Most parties lack clear ideological orientation, durable electoral bases, or functioning internal democracy. Many serve primarily as electoral vehicles for individual leaders or narrow interest groups. As of 2024, more than 360 political parties were formally registered in Ukraine, but very few present meaningful policy platforms or demonstrate any organizational development.⁵⁴ Populist appeals, rapid rebranding, and weak accountability undermine the role of parties as vehicles of programmatic representation.

Nevertheless, moments of broad-based cooperation, particularly in parliamentary support for key defense and European integration laws, suggest that cross-party coordination is not impossible. In wartime, some major votes have passed with clear supra-factional majorities, hinting at the potential for more structured coalitions around national priorities.

Critical Junctures

Ukraine stands at several critical decision points that will determine whether wartime democratic resilience transforms into sustainable long-term democratic consolidation. It is essential to develop the necessary legal framework now, during the war, so that constitutional amendments can be introduced immediately once martial law is lifted, ensuring that postwar reconstruction proceeds within a strong democratic framework rather than opening the door to authoritarian backsliding. The window of opportunity created by wartime reform momentum, unprecedented international attention, and clear European integration aspirations won't last forever.



Photo: Working Trip of the President of Ukraine to the Kharkiv Region. Credit: President of Ukraine.

Constitutional and Legal Framework Clarification

The most urgent and fundamental decision involves clarifying the constitutional and legal framework governing emergency powers, civil-military relations, and the division of authority among different levels of government. The current system of military administrations operates under legal provisions that Darkovich and Hnyda (2024)⁵⁵ characterize as dangerously ambiguous, allowing broad discretion that creates inconsistency across regions and significant potential for abuse. The “other grounds” clause that permits military administration creation has been interpreted so broadly that it undermines legal predictability and democratic accountability. This ambiguity extends beyond emergency governance to fundamental questions about the postwar constitutional order. Constitutional reform must establish clear, enforceable roles for the central government, *oblasts*, and *hromadas* while eliminating the legal vacuum that surrounds emergency governance. Otherwise, Ukraine risks entrenching temporary wartime practices that may be difficult to undo, potentially inflicting long-term damage on democratic governance structures. The stakes of this decision are enormous because constitutional ambiguity creates space for future power capture and institutional manipulation. If emergency powers

remain poorly defined, future leaders may exploit crises, real or manufactured, to concentrate power and loosen democratic constraints. Conversely, clear constitutional provisions can create binding constraints that protect democratic governance even under extreme pressure.

This reform cannot wait until the war ends. It must be initiated while martial law is still in effect, to ensure that emergency governance does not become the default peacetime structure. Clarification is particularly urgent before the shift to reconstruction-based governance in 2026.

Key Actors: The Verkhovna Rada holds primary constitutional responsibility for amendments and must demonstrate the political will to constrain executive power even during wartime. The President's Office, despite benefiting from current ambiguities, must recognize that long-term legitimacy depends on operating within clear legal constraints. The Constitutional Court requires full staffing and independence to interpret constitutional provisions authoritatively. International partners, particularly EU institutions, can provide technical assistance and political support for constitutional reform processes while making clear that European integration depends on constitutional clarity and democratic governance.

Judicial System Completion and Independence

While Ukraine has made significant progress in judicial reform, critical institutional gaps remain that threaten to undermine these achievements. The Constitutional Court operates without full staffing, appointment processes lack complete civil society involvement, and up to 60% of judicial positions remain unfilled in some regions (Kent 2024). The judiciary remains severely under-resourced, with more than 100 court buildings damaged and many courts operating in temporary facilities that compromise both security and public access.

Completing judicial reform requires not merely filling positions but creating sustainable institutions capable of independent operation under normal and emergency conditions. This means establishing permanent mechanisms for merit-based appointments with meaningful civil society input, creating new institutional structures like a national administrative court to replace the liquidated KDAC, and building judicial infrastructure that can withstand both physical and political pressures.

The decision point is whether to treat current judicial reforms as wartime-specific that can be reversed later or as permanent institutional changes that require sustained investment and protection. The quality of this decision will determine whether Ukraine emerges with a truly independent judiciary or returns to patterns of political influence and corruption that characterized the prewar system.

This decision must be implemented before reconstruction begins, when the judicial system will face intense demands related to property rights, contract enforcement, and corruption cases. Delays could permanently undermine the judiciary's credibility and overload a fragile system.

Key Actors: The reformed High Council of Justice and High Qualification Commission of Judges must demonstrate their effectiveness in merit-based selection while resisting political pressure from all sources. Civil society organizations require sustained funding and legal protections to maintain their oversight role in judicial appointments and performance monitoring. International partners can provide technical and financial support for judicial infrastructure modernization while maintaining political pressure for continued independence and reform.

Electoral System Preservation and Party Development⁵⁶

The 2020 Electoral Code represents a democratic achievement whose preservation faces mounting challenges from wartime disruptions and potential postwar pressures for system changes. The proportional representation system with open regional lists (in which voters choose a political party and can also select a specific candidate from that party's regional list, thereby influencing their ranking within the list) creates incentives for party development and inclusive competition that could transform Ukraine's political landscape, but only if the system is allowed to operate through multiple electoral cycles and parties adapt to its incentives.

The critical decision is whether to maintain this system through the challenges of postwar reconstruction or to revert to previous arrangements that favored personality-driven politics and clientelist competition. Preserving the 2020 Electoral Code requires not only maintaining its legal provisions but ensuring that displaced people can participate meaningfully, that electoral infrastructure is rebuilt to support inclusive competition, and that parties receive incentives to develop programmatic rather than personalistic appeals.

This decision will fundamentally shape the trajectory of Ukrainian democracy because electoral systems create the basic incentives around which political competition develops. A reversion to majoritarian or mixed systems would likely keep party institutions weak and continue to thwart programmatic competition, which has been lacking in Ukrainian politics for decades.

Key Actors: The Central Election Commission must maintain electoral infrastructure and prepare for postwar elections under challenging conditions while ensuring that displaced people and other vulnerable groups can participate meaningfully. Political parties must adapt to the new system's incentives for programmatic competition rather than personality-driven politics, requiring internal organizational development and ideological clarification. Civil society organizations play essential

roles in voter education, election monitoring, and advocating for inclusive electoral processes.

Anti-Corruption Institutionalization and Oligarch Restraint

Reduced oligarchic influence and strengthened anti-corruption institutions represent perhaps the most dramatic changes in Ukraine's political economy since independence. The war has created unprecedented space for democratic institutions to challenge oligarchic power (Méheut 2024), but this progress requires permanent institutionalization to prevent backsliding during reconstruction, when enormous financial flows may re-create opportunities for corruption and power capture.

The “de-oligarchization” law's enforcement during wartime demonstrated the potential for legal instruments to constrain oligarchic influence, but the law's effectiveness depends on sustained political will and institutional capacity that may face challenges as immediate wartime unity gives way to normal political competition. The arrest of Kolomoisky and actions against other oligarchs created precedents for accountability, but isolated prosecutions are insufficient without systematic institutional changes that prevent the emergence of new oligarchic structures.

The critical decision is whether to treat anti-corruption progress as a wartime anomaly that may not survive peacetime pressures or as a permanent transformation of Ukraine's political economy that requires sustained institutional investment and protection. This decision will largely determine whether reconstruction creates new opportunities for democratic development or merely new forms of corruption.

Key Actors: NABU, SAPO, and other anti-corruption institutions must maintain their independence and effectiveness against political pressures while expanding their capacity to handle reconstruction-related cases. The Prosecutor General's Office and judiciary must continue supporting high-level corruption prosecutions while developing systematic approaches to preventing rather than merely punishing corruption. International partners can provide technical assistance and political support for anti-corruption efforts while continuing to condition reconstruction assistance on institutional development and transparency.

The Cost of Failure

Failure to support Ukraine's democratic consolidation now will have profound long-term consequences extending far beyond Ukraine's borders. The costs of insufficient support are both immediate and generational, affecting regional stability, international democratic norms, and the credibility of democratic institutions worldwide.

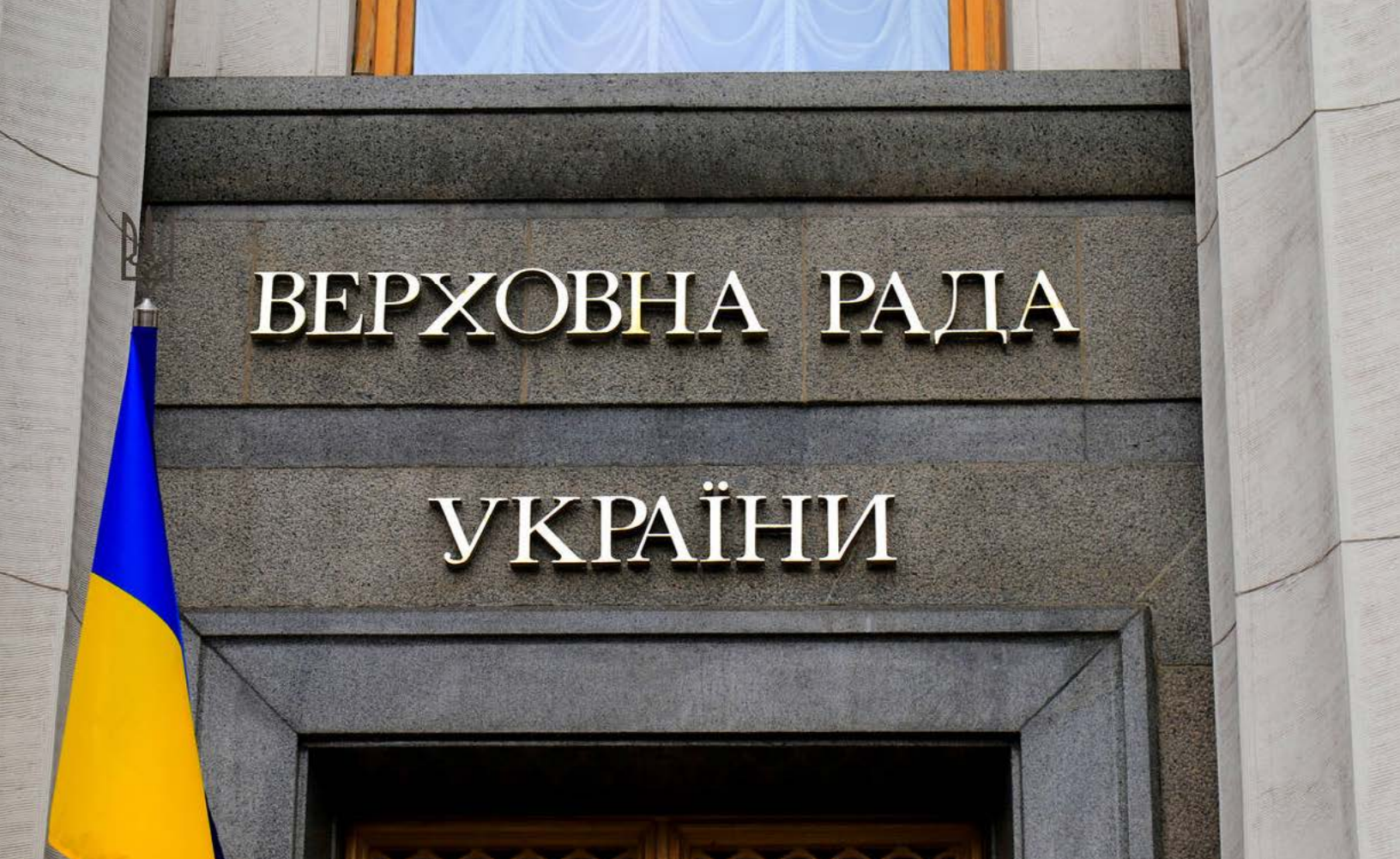


Photo: The façade of the building of the Parliament of Ukraine, Verkhovna Rada, with the inscription in the Ukrainian language. Credit: Rospoint via Alamy.

Domestic Consequences

Without adequate support for democratic institution-building, Ukraine risks sliding into a fragile hybrid political regime beset by weak rule of law, captured institutions, and limited political competition. Its impressive decentralization achievements could be reversed as central authorities seek to control reconstruction resources, eliminating the local governance structures that proved so vital during wartime.

The judicial reforms implemented under extreme pressure could collapse without sustained support, returning Ukraine to a system of politically influenced courts and widespread corruption. This would undermine public trust in democratic institutions and create space for authoritarian actors to exploit grievances and divisions.

The progress made in gender equality and minority rights could stagnate or reverse as traditional power structures reassert themselves during reconstruction. Without strong democratic institutions to protect pluralism, Ukraine could experience increased polarization and exclusion of marginalized groups from political participation.

Without transparent, accountable governance structures, reconstruction efforts would be vulnerable to corruption and elite capture. International donors would lose confidence in Ukraine's ability to use assistance effectively, reducing the flow of reconstruction aid and prolonging economic recovery.

Weak institutions would struggle to attract sustainable foreign investment or implement the structural reforms necessary for EU membership, trapping Ukraine in a cycle of economic dependence and political instability.

The absence of effective decentralized governance would prevent communities from participating meaningfully in reconstruction planning, leading to projects that fail to meet local needs and waste scarce resources.

International Consequences

A fragile hybrid regime in Ukraine would create a zone of instability in the heart of Europe, vulnerable to renewed Russian interference and aggression. Weak institutions would be unable to resist corruption, organized crime, and external manipulation, potentially spreading these problems to neighboring countries.

The failure of democratic consolidation in Ukraine would send a powerful signal to other postconflict societies that democracy cannot deliver effective governance under pressure. This would strengthen authoritarian narratives worldwide and discourage democratic reforms in fragile states.

The country's European integration would become impossible without functioning democratic institutions, leaving Ukraine in a geopolitical gray zone that invites further Russian aggression, undermining the EU's expansion strategy, and weakening the broader European project.

Strategic Recommendations

To ensure Ukraine's successful democratic consolidation and secure European future, the following strategic actions must be implemented:

- Complete constitutional reform to establish a clear division of powers among central government, *oblasts*, and *hromadas*, eliminating ambiguity with military administration authorities.
- Introduce the institution of prefects appointed by the president but tasked solely with legal oversight, avoiding duplication of executive power at the regional level.
- Restore pre-war fiscal decentralization including a return to direct interbudgetary relationship between *hromadas* and national center.

- Complete judicial reform by fully staffing courts, establishing a new national administrative court, and creating permanent mechanisms for merit-based appointments with civil society input.
- Modernize the judiciary infrastructure and digital access to ensure justice for all citizens, including displaced people and those in remote areas.
- Strengthen the Constitutional Court through full staffing and transparent appointment processes involving civil society participation.
- Enhance judicial independence through adequate funding, security measures, and protection from political interference.
- Institutionalize de-oligarchization through strict enforcement of transparency in political financing, anti-monopoly regulation, and independent media development.
- Maintain independence of NABU, SAPO, and other anti-corruption institutions with continued international support and oversight.
- Support party institutionalization through reform of party financing, internal democracy requirements, and civic education programs.
- Promote gender equality beyond formal quotas including enforcement mechanisms for party compliance and support for female candidates in all electoral districts.
- Advance anti-discrimination legislation including clear legal protections based on sexual orientation, gender identity, and disability status.
- Protect participatory governance including mandatory consultation processes and safeguards against interest group capture in reconstruction planning.
- Strengthen civil society capacity through funding, legal protections, and meaningful participation in policymaking processes.
- Encourage civic engagement from underrepresented groups through leadership training, participatory mechanisms, and inclusive policymaking.
- Maintain political support for democratic reforms through diplomatic engagement and conditionality in aid programs.

Security Developments in Ukraine

Volodymyr Dubovyk

What's at Stake

The war in Ukraine, now in its fourth year, has evolved into one of the most geopolitically consequential conflicts since the end of the Cold War. It is a brutal and ongoing assault by a revisionist authoritarian state against a democratic neighbor seeking integration into the Euro-Atlantic community. While the immediate violence happens on Ukrainian soil, its ramifications are global in scope and generational in impact.

A failure to support Ukraine decisively will embolden not only Russia, but all authoritarian states that rely on coercion, disinformation, and brute force to achieve their strategic goals. It will reinforce the dangerous message that international borders can be redrawn through violence and that democracies will not endure the costs of defending their partners. This outcome would deeply unsettle the transatlantic alliance, weaken the deterrent value of NATO, and undermine global norms of sovereignty, rule of law, and democratic governance.

On the other hand, a Ukraine that survives and thrives would stand as proof that democratic resilience, strategic unity, and international cooperation can overcome aggression. It would more firmly re-anchor European security, showing that collective resistance is both feasible and effective. It would also send a global message that democratic societies are willing to invest in one another's security, prosperity, and freedom. Ukraine is not just a battlefield — it is a proving ground for the 21st-century global order.

The State of Play

From the outset of the war, Ukraine defied many assumptions. Analysts predicted Kyiv would fall in days. Instead, Ukraine's armed forces held firm, leveraging their knowledge of local terrain, asymmetrical tactics, and high morale. Supported by extensive Western aid, they transitioned rapidly to NATO-standard systems and have integrated advanced technologies, including satellite-guided artillery, encrypted battlefield communications, and sophisticated drone warfare.

But Ukraine's resilience is not only military. The country's civil society, municipal institutions, and private sector have all contributed to a remarkable whole-of-nation resistance. Local governments have continued functioning under fire, organizing humanitarian support, restoring critical infrastructure, and maintaining basic

Ukraine's Military Expenditure (% of GDP)

From 2005 to 2025

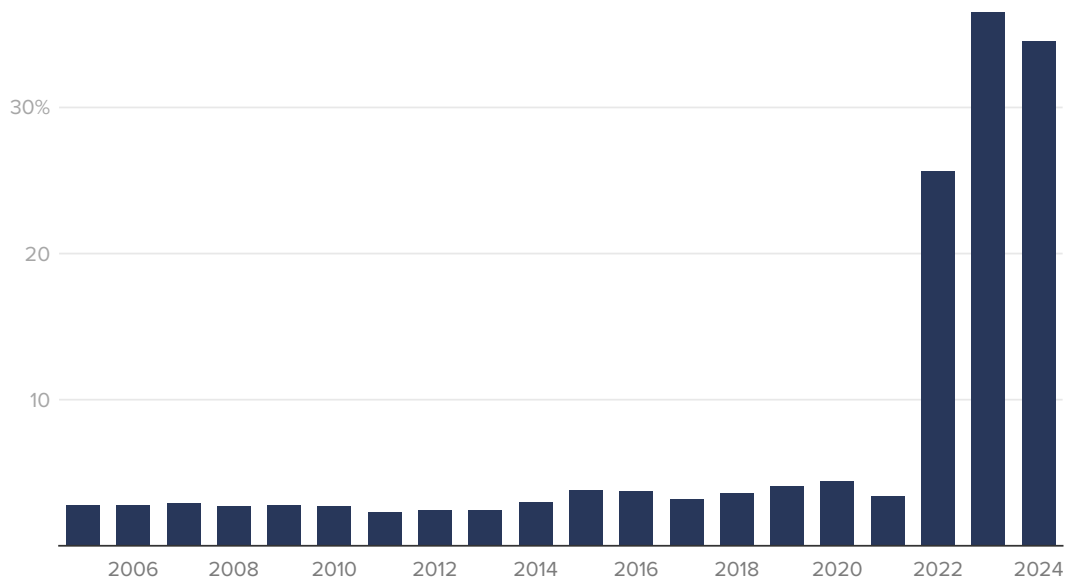


Chart: Center for European Policy Analysis. Source: SIPRI.

services. Civil society organizations have emerged as vital lifelines for vulnerable populations, particularly in war-affected and occupied regions.

Public trust in the government has surged — a frequent wartime phenomenon — reflecting widespread unity and confidence in national leadership. The digital resilience of the Ukrainian state has also been groundbreaking. Services such as Diia, a national e-government platform, have continued running throughout the war, providing citizens with digital access to public services and enabling real-time communication between the state and its people.

International observers have noted Ukraine's ability not only to absorb external support but to innovate and contribute back. Ukrainian experience in drone warfare, countering electronic warfare, and mobilizing civil defense has been studied and partially adopted by NATO allies. Ukraine is no longer just a recipient of aid — it is a laboratory of 21st-century defense.

This being said, Ukraine's present condition — militarily embattled, reliant on ad hoc Western support, and outside of any formal alliance — is unsustainable. It may work for a while, but not in the long term. Neither the prewar status quo nor the current arrangement is an answer in a strategic sense. They embed chronic vulnerability

Ukraine Public Opinion on NATO accession (2014–2025)

Percentage of survey respondents in support of or against NATO accession

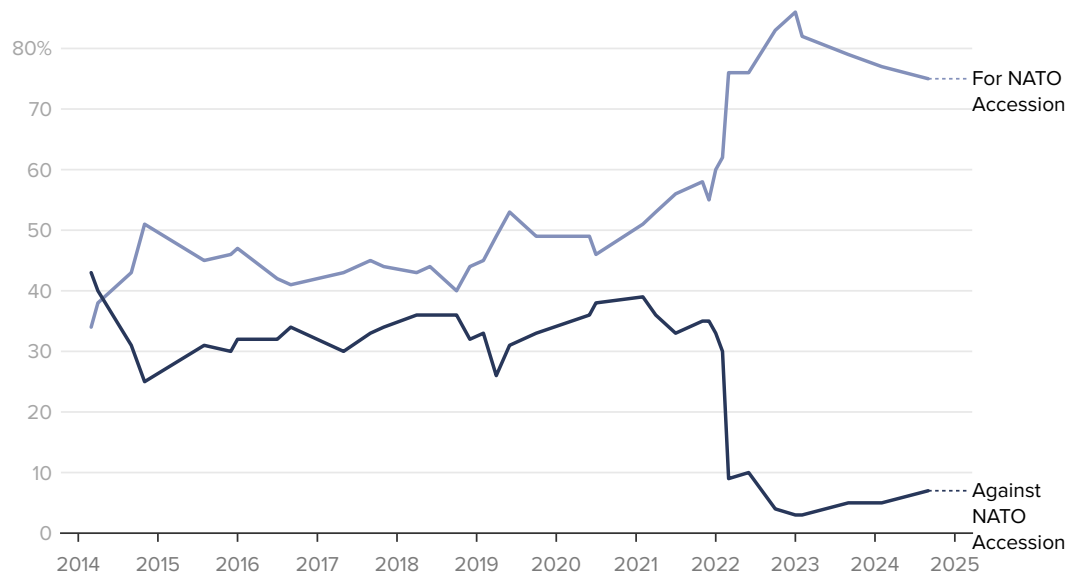


Chart: Center for European Policy Analysis. Source: Center for Insights in Survey Research; Rating Group; Rating Group.

and invite future Russian adventurism by signaling that aggression, while costly, does not necessarily meet decisive resistance or permanent exclusion from the global system.

Critical Junctures

There are multiple paths to sustainable deterrence. Full NATO membership remains the clearest and most stabilizing option, though it is politically fraught due to fears of escalation with Russia. Even without formal accession in the near term, however, NATO and Ukraine can significantly deepen operational integration. Steps include embedding Ukrainian officers in NATO command structures, joint command simulations, coordinated procurement strategies, and permanent training missions based in Ukraine.

Bilateral security agreements, especially with the United States, United Kingdom, Poland, and the Nordic states, could provide tailored support. These compacts should include pre-authorized defense logistics pipelines, cyber and space defense cooperation, and clauses for rapid military assistance in the event of future aggression.

A further imperative is integrating Ukraine into collective intelligence frameworks. This includes real-time satellite and signals intelligence sharing, collaborative threat analysis, and coordinated responses to hybrid threats such as energy sabotage or electoral interference.

Security architecture must also include a focus on infrastructure hardening — protecting critical networks such as energy grids, telecommunications, and railways from both cyber and kinetic attacks. The resilience of Ukrainian urban centers during bombardments has been notable, but peacetime security will require extensive investment in redundancy, decentralization, and physical protection.

Finally, Ukraine must be equipped not only to defend itself but also to contribute meaningfully to regional stability. As a frontline state, it can act as a strategic buffer, early warning hub, and training ground for democratic defense forces across Eastern Europe.

The Cost of Failure

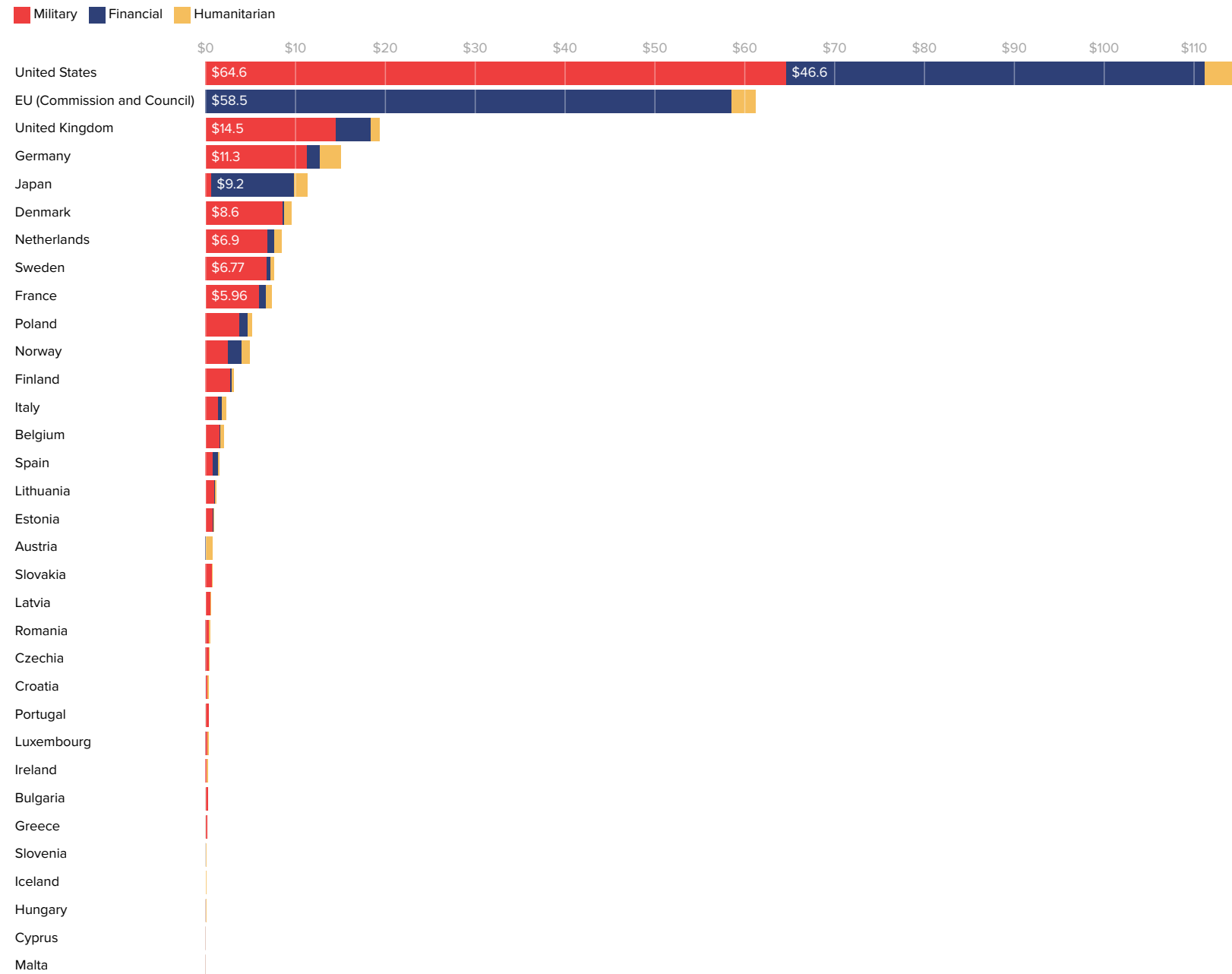
Ukraine's postwar security cannot rely solely on current, ad hoc military aid structures. A viable long-term solution must address the strategic gap created by Ukraine's current position: outside of NATO, yet deeply enmeshed in its logistical, doctrinal, and political frameworks. Decoupling Ukraine and NATO could significantly hobble the overall European security agenda.

A return to business as usual at the potential postconflict stage — reconstruction without credible deterrence — would be strategically reckless. It would discourage both domestic mobilization and external investment, creating a cycle of instability, as Ukraine and its strategic partners are realizing. Russia continues to signal, in its turn, that kicking the can down the road will only allow it to continue its aggression against Ukraine.

One of the challenges is to harden Ukraine's infrastructure. Much has been accomplished in that regard, but much more remains to be done, particularly on energy, the transportation grid, the communication network, and trade networks. Otherwise, Ukraine will not be as defensible and prepared as it needs to be. External assistance to Ukraine will also struggle with these hurdles if they are not addressed.

History has shown that incomplete settlements — like the Budapest Memorandum — offer only the illusion of protection. The Minsk accords, which do not provide a way out of the existing conflict, have only confirmed this. Indeed, the failure of the Minsk framework prodded Vladimir Putin to consider the full-scale invasion instead. Strategic ambiguity has served neither Ukraine nor broader European security. Hence, any viable option must address the structural weakness, and even danger,

International Aid to Ukraine (USD billion)



Total aid allocation by donor from January 24, 2022 to April 30, 2025. Chart: Center for European Policy Analysis. Source: Kiel Institute for the World Economy.

that follows from Ukraine being left out of collective security arrangements and consigned to strategic limbo.

The current coalition supporting Ukraine is a mosaic of actors — national governments, international organizations, private donors, and civil society — all contributing in different capacities. While this diversity offers flexibility and innovation, it also introduces risks of duplication, fragmentation, and strategic drift. There should be some extra efforts aimed at fine-tuning the plethora of actions designed to boost Ukraine's defense capabilities. Otherwise, all the money and weapons sent to Ukraine will not reach their maximum effect.

Strategic Recommendations

To sustain support over the long term, Ukraine and its allies need better tools for coordination. A unified coordination platform could streamline aid delivery, track military and nonmilitary contributions, and assess impact in real time. It should ideally include Ukraine as an equal participant, ensuring ownership and responsiveness to local priorities. Responsibility-sharing should also be formalized, with various allies focusing on different sectors. Interoperability of contributions will be critical: Military platforms, reconstruction efforts, and digital systems should play a critical role.

Strategic fatigue is a growing concern. As domestic pressures, elections, or crises elsewhere shift attention in donor countries, there is a risk of waning commitment.

Public diplomacy is also essential. Clear, honest communication with Western publics about the stakes of Ukraine's success and the costs of failure will help inoculate support against misinformation, economic anxiety, and war fatigue. Allies should highlight success stories — from battlefield innovations to community resilience — to reinforce the narrative of Ukraine as a worthy, effective, and values-aligned partner.

Ukraine's physical, economic, and social reconstruction will be one of the largest in Europe since World War II, but it must do more than just rebuild what was lost. It must lay the foundations of a modern, resilient, and inclusive European democracy. Reconstruction cannot wait until the war ends. Urgent priorities such as winterization, energy grid repair, and civilian demining must be addressed in parallel with military needs. Long-term planning, meanwhile, must begin now to prevent ad hoc or politically driven recovery efforts later.

The key principles of transparency, sustainability, and conditionality should guide reconstruction. Strategic industries such as energy, transportation, and digital infrastructure deserve special attention. Private sector engagement will be crucial. Reconstruction will not succeed through public investment alone.

Support for Ukraine's EU Accession among Ukrainians (2014–2025)

Percentage of survey respondents in support of or against EU accession

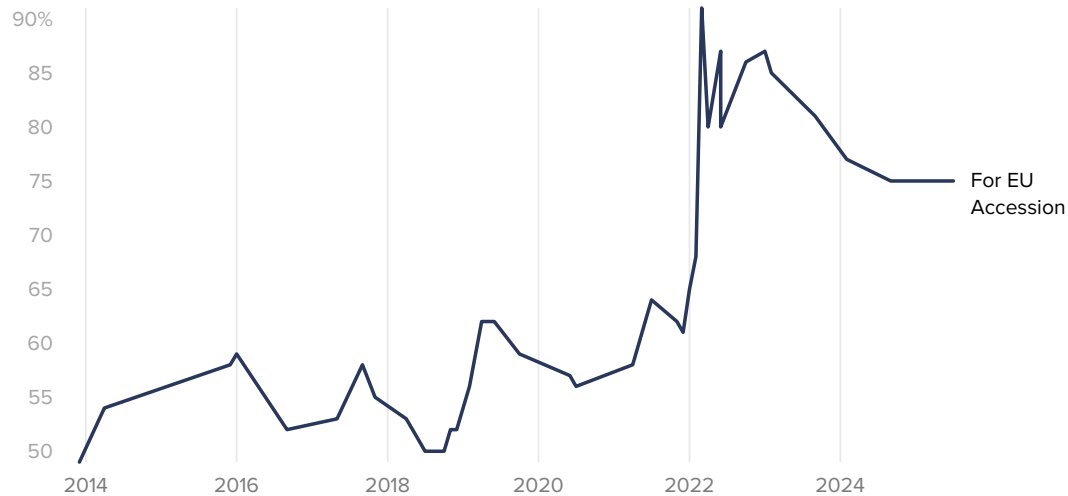


Chart: Center for European Policy Analysis. Source: Center for Insights in Survey Research; Rating Group; Rating Group.

Strategic patience will be essential to sustaining Ukraine's recovery and security. While there is an understandable desire for rapid results — a military victory, an economic revival, EU accession — the reality will be slower, uneven, and subject to reversals. Managing expectations, both in Ukraine and among its partners, is therefore essential. Public communication should balance optimism with realism. For example, EU accession is unlikely to happen soon, but measurable progress can be communicated as wins along the way.

Ukrainian leaders must prepare the public for a prolonged hybrid conflict scenario, where even after cessation of major hostilities, Russia may continue to employ cyberattacks, sabotage, political subversion, and economic coercion. Resilience must be understood as a permanent state of readiness, not a temporary wartime posture.

Donor countries, meanwhile, must commit to long timelines. Support cannot be contingent on short-term political cycles, budget calendars, or media trends. Planning for strategic patience also requires building institutional memory and continuity. Staffing Ukraine-related missions in foreign ministries and international organizations with long-term experts, establishing standing parliamentary groups, and creating Ukraine-focused academic and research institutions will ensure sustained intellectual and political engagement.

To better prepare for Ukraine's future and guide strategic decisions, it is vital to explore potential scenarios based on current trajectories.



Photo: European Parliament President Roberta Metsola meets with Volodymyr Zelenskyy in Kyiv, Ukraine, September 17, 2025. Credit: President of Ukraine.

Scenario 1: Euro-Atlantic Integration Triumphs

In this optimistic path, Ukraine holds its territory, gradually restores sovereignty, and integrates deeply with NATO and the EU. Security compacts evolve into full NATO membership, and Ukraine becomes a model of democratic recovery. Economic growth is robust, driven by reconstruction and digital transformation, and millions of displaced citizens return home. Russia is contained but not fully transformed, remaining a hostile neighbor but with diminished capacity.

Scenario 2: Frozen Conflict and Strategic Ambiguity

A less favorable scenario sees major hostilities end without a peace treaty. A de facto ceasefire line freezes territorial status. Ukraine remains outside NATO but maintains strong bilateral military support. Reconstruction occurs unevenly, hampered by insecurity near the frontline. The EU remains engaged, but public fatigue reduces momentum. This scenario creates enduring geopolitical instability and economic uncertainty.

Ukraine 2036: How Today's Investments Will Shape Tomorrow's Security

Scenario 3: Western Fatigue and Ukrainian Vulnerability

The worst-case outcome involves waning Western support due to domestic political changes, economic crises, or competing global conflicts. Ukraine, left with insufficient resources and security guarantees, struggles. Russian influence resurges through hybrid methods. Ukraine becomes a buffer zone, unstable, and vulnerable.

Ukraine Reconstruction and Recovery Anticipated Costs (USD billion)

As assessed in December 2024, proposed to cover a 10-year period for Ukraine's post-war recovery. Total cost is \$523.6 billion.

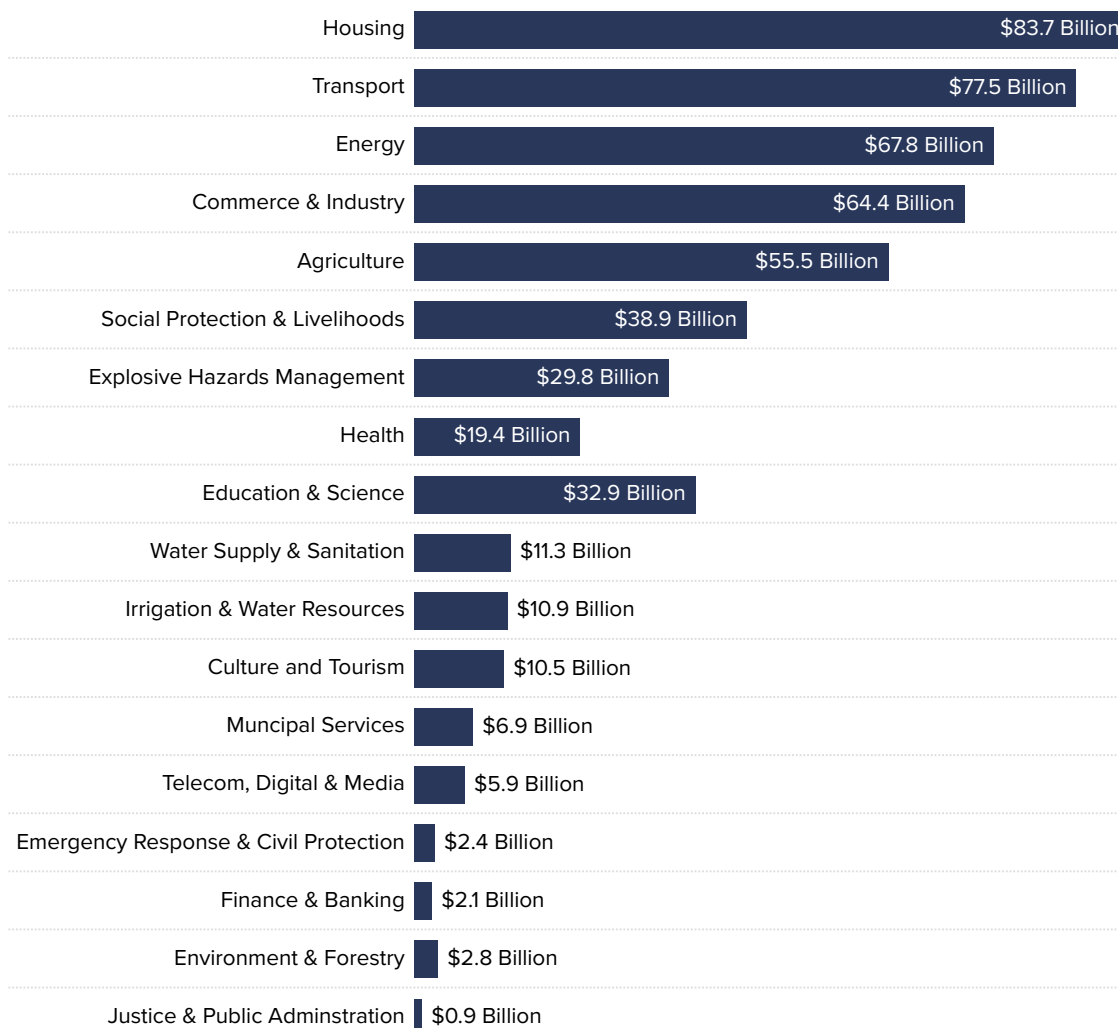


Chart: Center for European Policy Analysis • Source: the World Bank, the Government of Ukraine, the European Union, the United Nations.

Each scenario underscores the urgency of proactive, sustained engagement. The choices made today will determine which future materializes. Strategic flexibility must be coupled with unwavering commitment.

A successful strategy for Ukraine requires tailored roles for key stakeholders — international partners, Ukrainian leadership, civil society, and private actors. The roadmap must be dynamic, multilayered, and time-sensitive.

For NATO and EU Members:

- Expand operational support regardless of formal membership. Create permanent training missions, intelligence liaisons, and logistics hubs inside Ukraine.
- Align security and economic support with long-term metrics. Establish performance-based funding tied to governance and security outcomes.
- Lead by example in communication. Reaffirm Ukraine's future in the Euro-Atlantic community at every summit and actively counter misinformation.

For Multilateral Donors and Financial Institutions:

- Prioritize high-impact, scalable infrastructure investments — energy grids, digital systems, transport corridors.
- Use innovative financing tools such as blended finance, diaspora bonds, and climate-resilient reconstruction funding.
- Put conditions on assistance that promote institutional integrity and transparency.

For the Ukrainian Government:

- Maintain wartime unity while investing in postwar institutions. Balance military priorities with social cohesion and anti-corruption efforts.
- Strengthen democratic checks even under martial law. Ensure parliament, courts, and the media operate with oversight.
- Design reconstruction as a national participatory project, with citizen input, regional equity, and youth engagement.

For Civil Society and Local Governments:

- Act as watchdogs of aid delivery, reconstruction, and governance.
- Mobilize diaspora networks for investment, knowledge transfer, and advocacy.
- Promote trauma-informed programs in education, health care, and veteran reintegration.

For the Private Sector:

- Seize first-mover advantage in sectors like IT, green energy, agritech, and defense.
- Advocate for stable investment frameworks through public-private dialogues.
- Partner with Ukraine's small- and medium-size businesses to foster innovation and employment.

This roadmap should be continuously revised in response to battlefield developments, geopolitical shifts, and societal feedback. But the overarching aim remains: a secure, democratic, and prosperous Ukraine as an anchor of Euro-Atlantic stability.

Conclusions & Policy Recommendations

Volodymyr Dubovyk, Uliana Movchan, Kseniya Sotnikova, and Sam Greene

In 10 years' time, Ukraine will either bolster an increasingly secure, prosperous, and cohesive Europe, or it will be a deepening source of instability and conflict. One way or another, whether it is an asset or a challenge, Ukraine will be at the heart of Europe's security landscape. The decisions that will shape that outcome, however, are not far off in the future; they are being made now.

As this report has shown, the ad hoc aid and strategic ambiguity that have characterized Western support for Ukraine since February 2022 are untenable. Partners should institutionalize support (training missions, intelligence integration, logistics hubs inside Ukraine) while hardening energy, transport, and digital networks against hybrid attack. Meanwhile, the recovery bill is vast — \$524 bn at first blush, but likelier a trillion or more — with mine contamination on an unprecedented scale. Planning, rehabilitation, and transparent delivery must thus proceed even as fighting continues, rather than waiting for it to stop. Democratic choices made by Ukrainians themselves also carry long-tail effects: Constitutional clarity, completed judicial reform, and preserving the 2020 open-list electoral system will determine whether reconstruction attracts capital or recentralizes power and invites capture.

Agenda 2036: Locking In Ukraine's Future Now

Decisions made now will determine whether Europe's eastern flank becomes securely predictable or predictably insecure. Contingent commitments to fund reconstruction or assure a ceasefire will not suffice. Each month that passes without the effective and durable deployment of financial, military, and human resources raises the eventual cost of restoring peace and stability. Eventually, without prompt action, that cost will become insurmountable.

Three priorities are clear.

First: Build the Security Backbone Now, Without Waiting for an End to the Fighting

Deterrence will be made real by Europe's ability to defend Ukraine against Russia's current onslaught, not by its tough talk on a future assault. Europe's credibility and homeland defense depend on hardening Ukraine's critical energy and transport infrastructure and digital networks against physical and hybrid attack; scaling in-country defense production, logistics, and maintenance; integrating intelligence flows; and fielding permanent training missions with Ukrainian units. Ukraine already has emerged as a potent contributor to European security. By sharpening both

Ukraine's ability to defend itself and Europe's commitment to Ukraine's defense, these measures would reduce the risk of escalation while reassuring voters and investors that Ukraine will be insulated against Moscow's appetites.

Second: Institutionalize Large-Scale, Transparent, and Accountable Reconstruction

Ukraine already faces a trillion-dollar recovery, affecting every aspect of the country's economic and social life. Stop-gap approaches to keeping the lights and heat on and goods flowing have bolstered wartime resilience but lack stable funding and consistent governance — a lack that multiplies the eventual cost of lasting reconstruction. Reconstruction funding needs an institutional framework now, consisting of a multinational donor platform with sufficient fiscal headroom and prudential oversight to ensure a decade-long commitment, along with a transparent and accountable Ukrainian coordination platform. Locking in these systems now will deter corruption, lower risk premiums, attract private capital, and stabilize Ukraine's own fiscal planning.

Third: Mobilize Ukrainian Democracy to Lock in a More Secure Future

Ukrainian politics is and will remain boisterous and fractious. The country's wartime resilience, however, has laid an ideal foundation for a new peacetime social contract, ensuring social cohesion, investor confidence, and civic engagement as the country grapples with the massive tasks of rebuilding, reintegrating refugees, and completing the reforms required for accession to the European Union. This means acting now to set clear and binding expectations for the eventual rollback of martial law and emergency powers, reestablishing the autonomy of regional and local authorities, and enshrining the independence of the judiciary and anti-corruption institutions.

Western and Ukrainian policymakers face two truths. One, the priorities of deterrence, reconstruction, and democratic resilience are inseparable. They must advance in parallel, or none of them will endure. And two, the time for action is now. The decisions that will determine Ukraine's future are being made now — and inaction is also a decision.

The Agenda for Ukraine: Convert Wartime Resilience into Systemic Credibility

What's at stake: Kyiv must turn battlefield stamina into institutions that citizens, investors, and allies can trust under stress: clear emergency-powers rules and center-local competencies, a sufficiently staffed and independent judiciary, protected anti-corruption bodies, inclusive first postwar elections, and radical transparency in

reconstruction. If these pieces don't lock, donors will hesitate, private capital will price in risk, and social cohesion will fray just when Ukraine will need it most.

- **Enshrine decentralization in the constitution and bolster the courts:** Lock in legal guardrails on emergency powers and define central-regional-local roles (including lawful oversight) so wartime improvisations don't become peacetime shortcuts. Complete merit-based judicial staffing and modernize court access to handle surges in property, contract, and corruption cases during rebuilding. Delay here invites power concentration and legal bottlenecks that erode legitimacy as citizens and investors make consequential decisions about where to build their futures.
- **Make clean politics irreversible:** Safeguard the independence of the National Anti-Corruption Bureau, the Special Anti-Corruption Prosecutor's Office, and related bodies, and shore up media pluralism and political-finance transparency to keep reconstruction from reproducing oligarchic capture. Recent push-and-pull over these institutions showed both the temptations and the system's immune response. Codify that resilience now. A credible rule-of-law signal is the cheapest risk reducer Ukraine can issue.
- **Run inclusive postwar elections:** Preserve the proportional, open-list system that incentivizes programmatic parties and broad representation, while updating registries for displaced people, enabling their participation with appropriate, secure tools. The legitimacy of that first vote will set the tone for reintegration and EU-path reforms. Treat electoral readiness as core state-capacity work, not a box-tick.
- **Encourage defense-industrial public-private partnerships with guardrails:** Use the updated PPP framework — including for joint defense projects — to strengthen the domestic defense base and attract investment, while keeping procurement data open to the public and under independent scrutiny. This both supports deterrence and anchors high-value jobs. Execution discipline matters more than slogans.
- **Reconstruct with radical transparency and unified coordination:** Adopt/ implement a clear legal framework for reconstruction and run projects through open-data platforms (e.g., DREAM) with civil-society oversight. Unify donor efforts in a single coordination tool tied to governance benchmarks to avoid duplication and attract private investment. Transparency lowers risk premiums and deters graft at scale.
- **Treat social policy as security policy:** Scale demining to unlock land, logistics, and housing, while investing in re-/up-skilling that links internally displaced people and returnees to reconstruction jobs. Expand veteran rehabilitation and employment support to avoid division and unrest by the early 2030s. These human-capital moves are as decisive for deterrence as any platform.



Photo: Aug 24, 2020, March of the defenders of Ukraine on the occasion of 29th anniversary of Independence of Ukraine in Kyiv. Credit: Mykhailo Palinchak via Alamy

The Agenda for Europe: Lead on Deterrence and Integration

What's at stake: European credibility will be judged by whether Europe fields an autonomous deterrent backbone with Ukraine — training, intelligence, logistics inside Ukraine, and infrastructure hardening — while tying lending and financial aid to integrity and inclusion. If Europe leads on security and conditional financing, it preserves space for reforms and lures private capital; if it hesitates, both security and reconstruction sit on sand.

- **Build the deterrent backbone in Europe:** Establish European-led permanent training missions and intelligence/logistics hubs with Ukraine, and deepen interoperability irrespective of formal timelines. Pair this with sustained investment in hardening energy grids, rail, and digital networks against cyber and kinetic attack so the economy — and elections — can function under pressure. A visible, European-owned posture raises the cost of renewed aggression.

- **Establish responsibility-sharing by sector, on a unified platform:** Formalize who leads on what — e.g., energy grids, rail, digital, and demining — and track delivery and impact on a common coordination platform with Ukraine as an equal participant. Sector leads keep the tempo; the platform prevents duplication and drift. It's how conditional finance stays credible over years, not months.
- **Finance big, condition smart, de-risk investment:** Prioritize energy, transport, and digital corridors via instruments and innovative tools (e.g., blended finance, diaspora bonds) by the EU and international financial institutions that attract private investment. Link disbursements to transparent procurement and delivery through open-data systems in order to lower risk and deter capture. Expand participation by small- and medium-size businesses rather than bypassing them to help anchor supply chains in Ukraine.
- **Protect the democratic lane while countering hybrid threats:** Support election administration for displaced voters, independent election observation consistent with EU standards, and plural media and watchdog groups that monitor reconstruction. Democracy support here is frontline security policy, not an add-on. It undercuts disinformation and sustains public trust through long delivery cycles.
- **Practice strategic patience and lock in long-haul commitments:** Resource long-term Ukraine expertise across EU institutions and capitals, and be candid with publics about timelines and trade-offs. Use coordinated public diplomacy to inoculate against fatigue. Choices in 2026 will be judged by their 2036 payoffs — keep that frame explicit.

The Agenda for America: Enable a Stronger, More Secure Future

What's at stake: Washington's comparative advantage is its ability to hard-wire continuity through bilateral compacts, intel/cyber/space cooperation, and logistics, and to catalyze risk-taking capital alongside Europe. If predictable pipelines and cofinancing are locked in, Europe can carry the visible lead while Ukraine plugs into an institutionalized deterrent. Vacillating support, on the other hand, just leads to security gaps and stalled investment.

- **Seal bilateral compacts that plug into European efforts:** Preauthorize logistics, training, and real-time intelligence sharing, including cyber and space cooperation, designed to dovetail with European missions in/with Ukraine. Build in rapid-assist clauses to close windows of vulnerability without shifting the visible lead. Integrate Ukraine's defense industry into allied supply chains to stabilize sustainment.

- **Align support to performance and attract capital:** Tie security and economic assistance to governance and delivery benchmarks that reward anti-corruption progress and transparent procurement. Co-deploy innovative financing with European partners to mobilize private investment into priority infrastructure. This answers investor concerns about security and integrity while moving from grants to growth.
- **Institutionalize continuity and credible communications:** Resource long-term Ukraine desks, standing parliamentary groups, and academic partnerships; plan for strategic patience beyond electoral cycles. Coordinate public messaging with Europe to reaffirm Ukraine's Euro-Atlantic future and counter disinformation. Consistent narrative lowers political-risk premiums that would otherwise price out private capital.

The Forest for the Trees

If Kyiv consolidates clean, inclusive institutions, if Europe assumes visible responsibility for a credible deterrent while linking major finance to reform, and if the United States supplies steadiness and risk-sharing, Ukraine can emerge by the early 2030s as a secure European democracy with a growing economy and a military able to deter renewed assault. If any part of that bargain fails, aid will become episodic, reconstruction will invite capture, and a gray-zone frontier will harden on the EU's border. The bill will be paid either way — now, in institutions, transparency, and integrated defense, or later, in lives, capital, and strategic drift. In 2036, decisions made now will be remembered either as the moment the West understood the challenge and value of Ukraine, or as the point at which it chose to abdicate.

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