

First survey

of large and medium-sized
business representatives within
the framework of the "ToP-
Barometer of Change" project

13-24.01.2025



Methodology



Research Objective:

To understand the perspectives of key decision-makers in the business sector regarding reforms, the effectiveness of anti-corruption efforts, and business development in Ukraine.



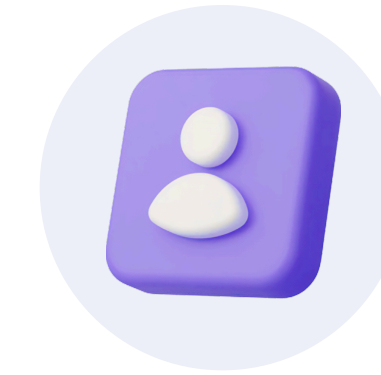
Target Audience:

Owners, executives, and top management of medium and large businesses in Ukraine.



Survey Method:

An online survey conducted by sending questionnaires to a selected group of respondents.



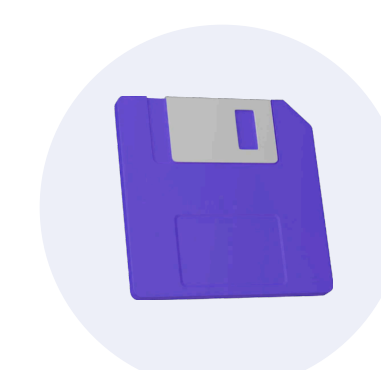
Sample Size:

75 respondents.



Survey Period:

January 13–24, 2025.



Data Collection:

Data collected by "Gradus Research".

The survey was conducted among owners and top executives of leading companies operating in Ukraine, representing a wide range of industries, including finance, investment, agribusiness, technology, logistics, manufacturing, consulting, and legal services. Among the participants are business leaders whose companies are among the largest in Ukraine, leading their respective industries and making significant contributions to economic development, innovation, and social initiatives. **Many of them are featured in rankings by Forbes, EY, and Deloitte**, and their companies have international recognition, setting trends in their industries. **To maintain the anonymity of respondents, the specific names of the companies are not disclosed, however they play a key role in the market.** These companies not only shape Ukraine's economic landscape but also actively develop innovative solutions, invest in the future, and implement advanced business practices on a global scale.

Key Findings

1 Implementation of Reforms: Support for the General Course but Doubts About Government Efficiency

- **61%** of respondents believe that Ukraine is moving in the right direction in implementing reforms in line with international commitments (to the EU, IMF, World Bank, etc.). This indicates a relatively high level of trust in the overall course of reforms in Ukraine. Additionally, **53%** assess reform progress in 2024 as "moderate" or "high", while only **14%** believe there has been no progress.
- At the same time, **58%** of respondents consider the government of Ukrainian Prime Minister D. Shmyhal ineffective in implementing these reforms: **37%** rate its work as "rather ineffective", and **21%** as "completely ineffective". This highlights significant business distrust in the government's ability to carry out reforms effectively.

2 Impact of Reforms on Business: Cautious Optimism

- **56%** of respondents note a positive impact of reforms on their business operations. Among them, **47%** consider this impact "rather positively", and **9%** see it as "very positively". This suggests that overall, reforms contribute to business development. However, a significant share of entrepreneurs (**28%**) see no improvements or remain skeptical about the effectiveness of changes.

3 Corruption: Lack of Trust in Anti-Corruption Efforts but Limited Personal Experience with Corrupt Practices

- **53%** of respondents do not believe that corruption levels in Ukraine decreased in 2024. This reflects a lack of business confidence in the government's anti-corruption efforts. However, **53%** also reported that they had not encountered corruption from state authorities in the past month. Nonetheless, **34%** had personally experienced or heard from acquaintances about corruption incidents.
- Additionally, **46%** assess the ability of businesses to participate in public tenders without corruption risks as low. This suggests that public procurement remains an area of heightened corruption risks for entrepreneurs.

4 Assessment of State Authorities: Moderate Integrity but Mixed Opinions on the Performance of Specific Agencies

- **61%** of respondents rate the integrity of state authorities in their interactions with businesses as moderate. Meanwhile, **21%** consider it high.
- Regarding the State Customs Service, **39%** of respondents believe its performance remained unchanged in 2024, while **17%** noted deterioration.
- Opinions on state property management efficiency in 2024 were divided: **36%** think it improved, while **32%** believe it deteriorated.

5 Political and Economic Expectations from the New U.S. President: Mostly Positive Outlook

- **54%** of respondents expect Donald Trump's potential influence on Ukraine's political and economic situation to be positive. Among them, **47%** consider it "moderate positive", while **7%** see it as "significant positive". Meanwhile, **30%** anticipate negative consequences. These figures suggest a cautious optimism among businesses regarding future U.S. policy toward Ukraine.

6 Economic Situation: Business Feels Negative Pressure from the Current Economic Environment

- **63%** of respondents negatively assess the impact of the current economic situation on their operations. Among them, **44%** describe this impact as "rather negatively", and **19%** as "very negatively". Only **16%** view it positively. These results indicate significant economic challenges faced by businesses in Ukraine, likely linked to macroeconomic instability, high business costs, and the impact of the war.

Top Interesting Metrics

61%

Respondents believe that, overall, the process of implementing reforms in Ukraine in accordance with its international commitments is moving in the right direction.

56%

Respondents believe that the reforms introduced in Ukraine in line with international commitments have had a positive impact on their business. Among them, 47% assess this impact as rather positively, while 9% consider it very positively.

54%

Respondents positively assess D.Trump's potential impact on Ukraine's political and economic situation over the next 12 months. Among them, 47% believe Ukraine will experience a moderate positive impact, while 7% expect a significant positive impact.

53%

Respondents have not encountered specific cases of corruption from state authorities in the past month.

61%

Respondents assess the level of integrity in the work of state authorities in their interactions with their business as moderate.

53%

Respondents do not believe that the level of corruption in Ukraine decreased in 2024.

58%

Respondents consider the work of the government led by Ukraine's Prime Minister D.Shmyhal ineffective in implementing reforms. Among them, 37% rate the government's work as rather ineffective, while 21% see it as completely ineffective.

46%

Respondents rate the ability of their businesses to participate in public tenders without the risks of corruption, unfair competition, and similar threats as low.

63%

Respondents negatively assess the impact of Ukraine's current economic situation on their business operations.

39%

Respondents believe that the quality of work of the State Customs Service of Ukraine remained unchanged in 2024.

Corruption, Integrity Issues and Misconduct

?

Level of corruption

?

Fair competition

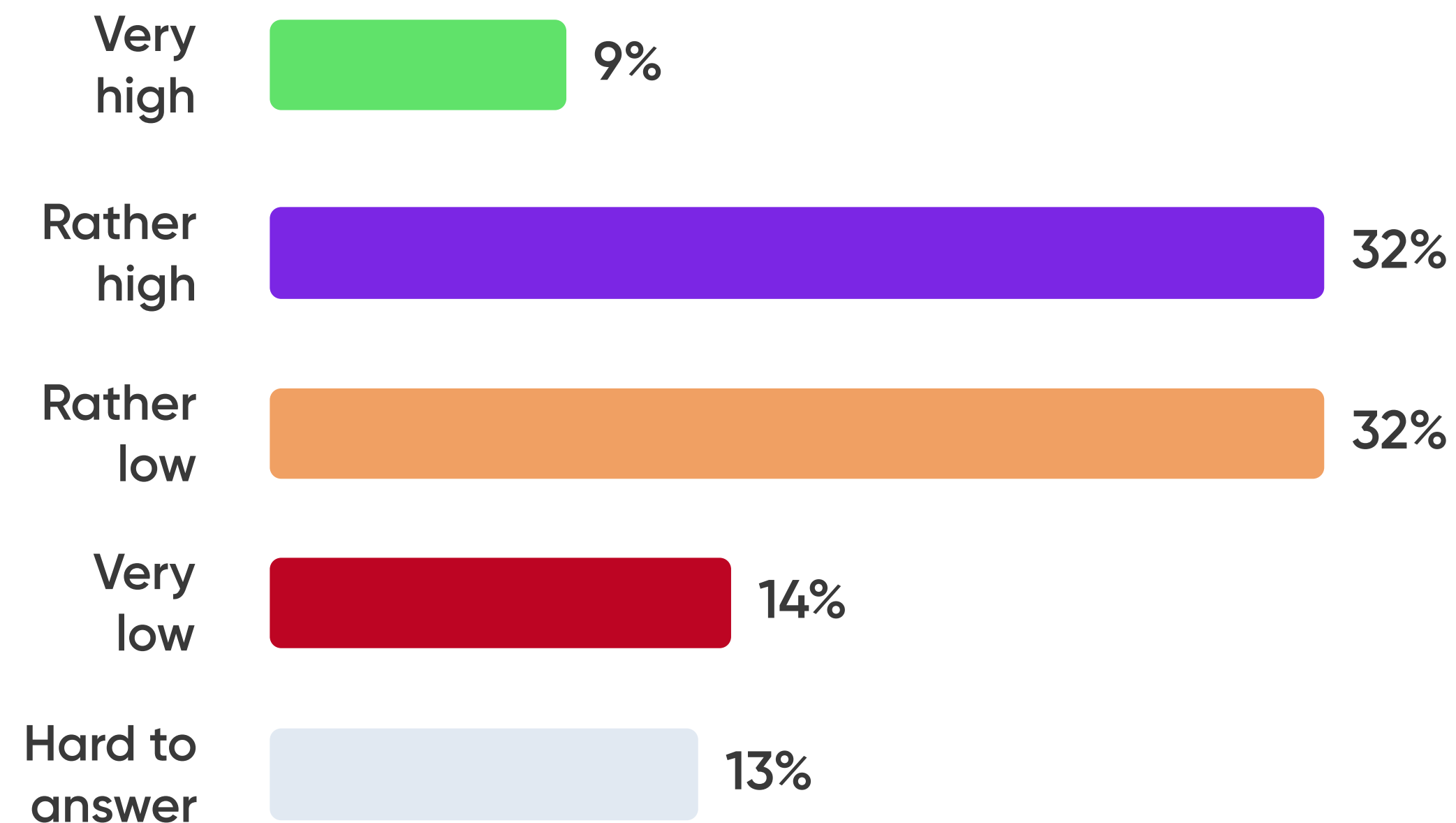
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Integrity of government
bodies

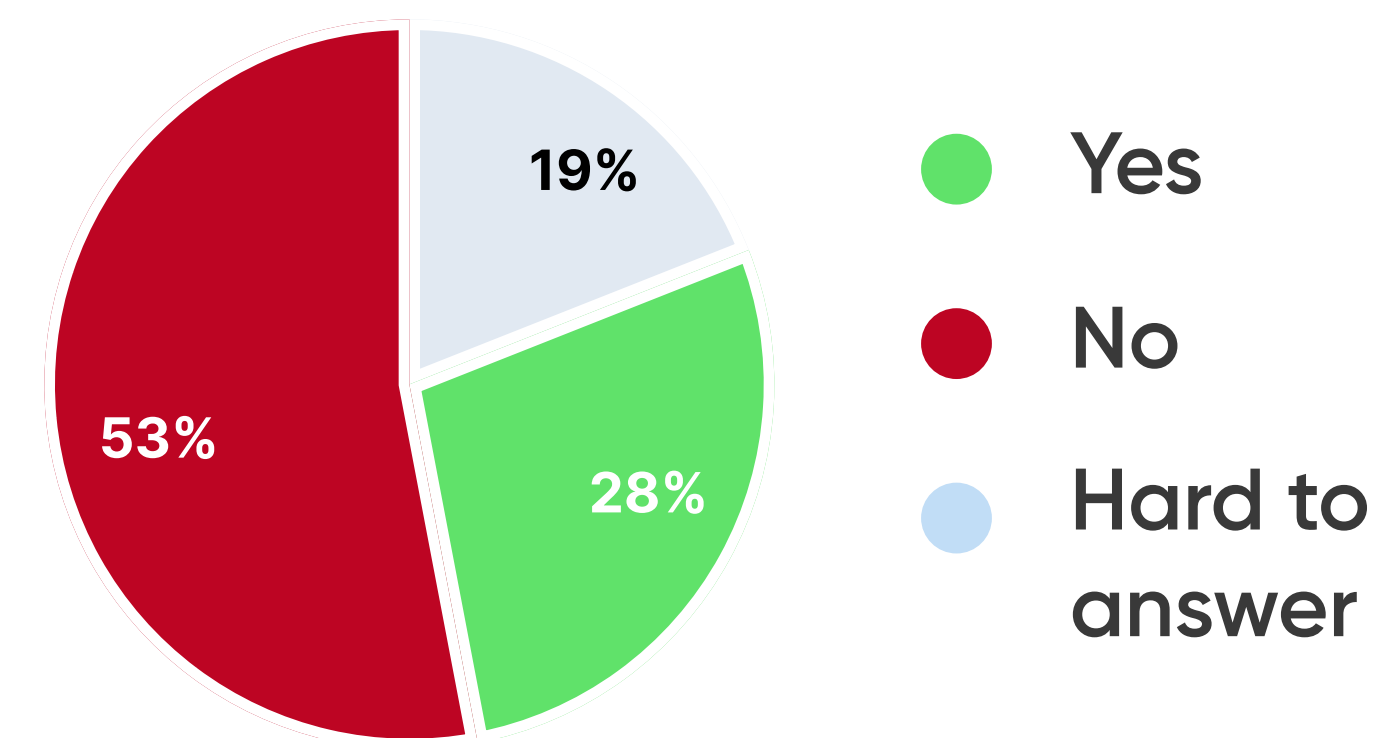
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Corruption by government
agencies

How do you assess the ability of your business to participate in public tenders without the risks of corruption, unfair competition, and similar threats?



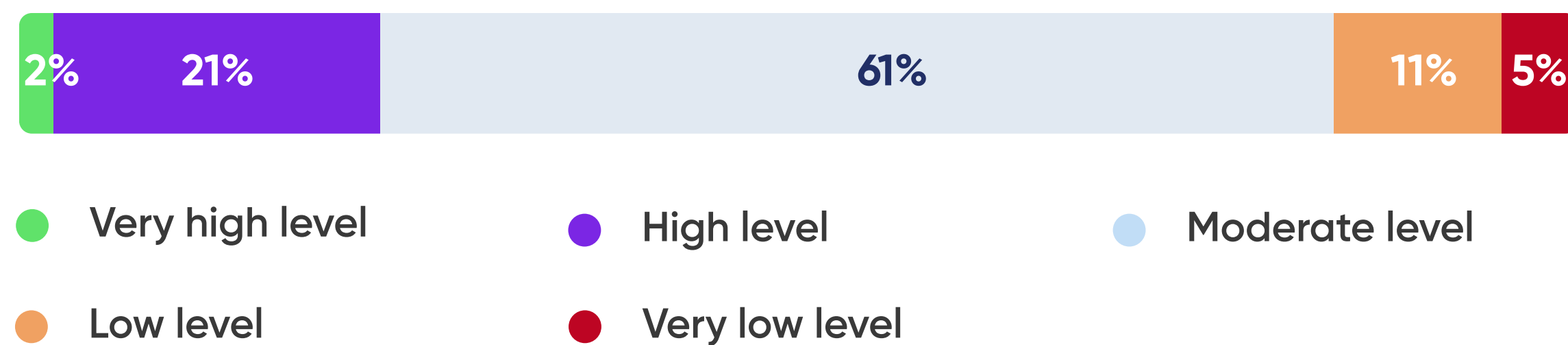
Do you believe that the level of corruption in Ukraine decreased in 2024 compared to previous years?



46% of respondents rate the ability of their business to participate in public tenders without corruption risks, unfair competition, and similar threats as low. Among them, 32% consider these opportunities rather low, while 14% see them as very low.

53% of respondents do not believe that the level of corruption in Ukraine decreased in 2024 compared to previous years.

How do you assess the level of *integrity in the work of state authorities in their interactions with your business at the moment?

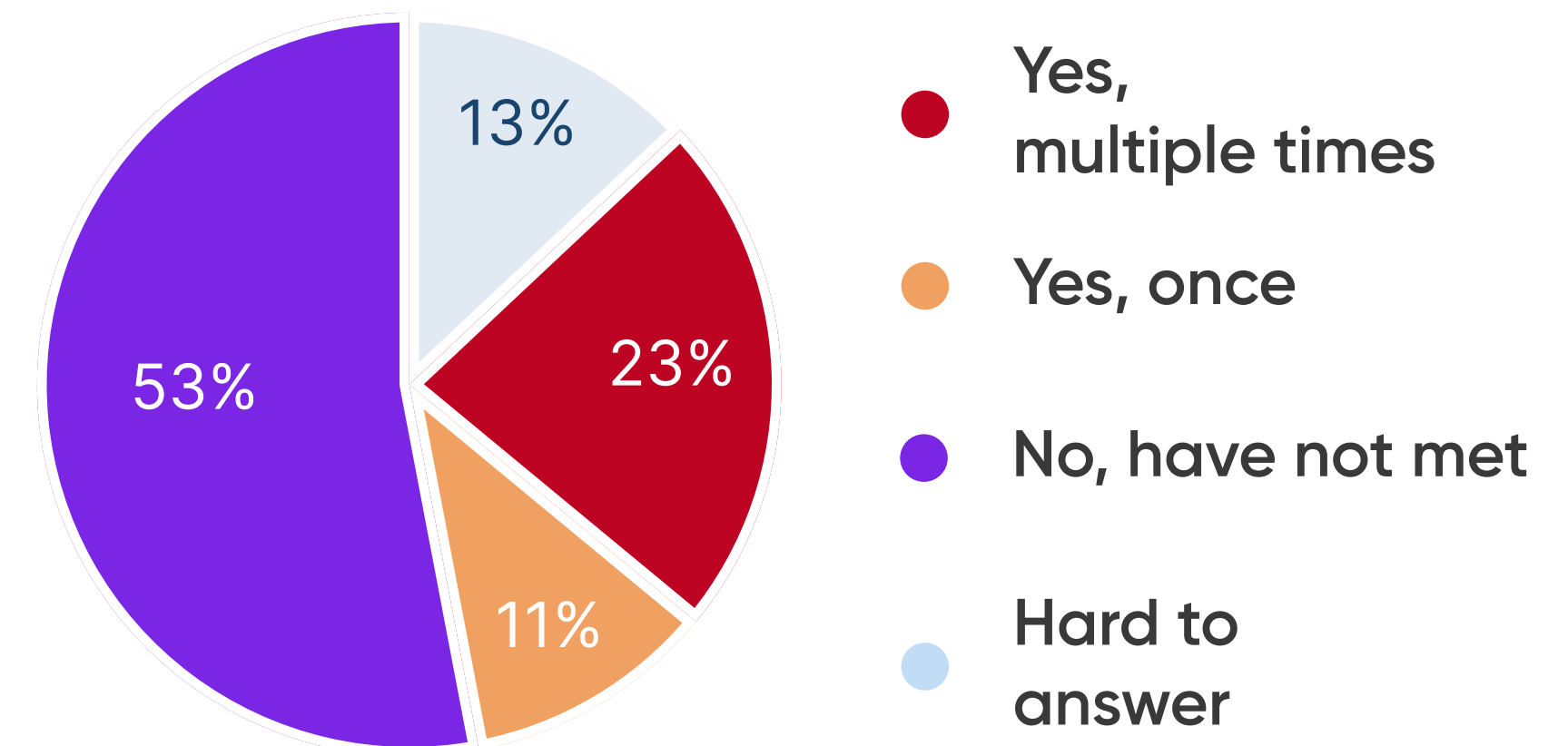


**Integrity refers to transparency, fairness, and accountability.*

61% of respondents assess the level of integrity in the work of state authorities in their interactions with their business as moderate, while 21% consider it high.

53% have not encountered corruption from state authorities in the past month, whereas 34% have experienced such cases.

Have you, your organization, or your business associates encountered specific cases of corruption* from state authorities in the past month?



**Corruption refers to bribery, illegal demands, granting of privileges, or other unlawful actions.*

Perception of Reforms

?

The process of implementing reforms in Ukraine in accordance with its international obligations

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Overall effectiveness of the government

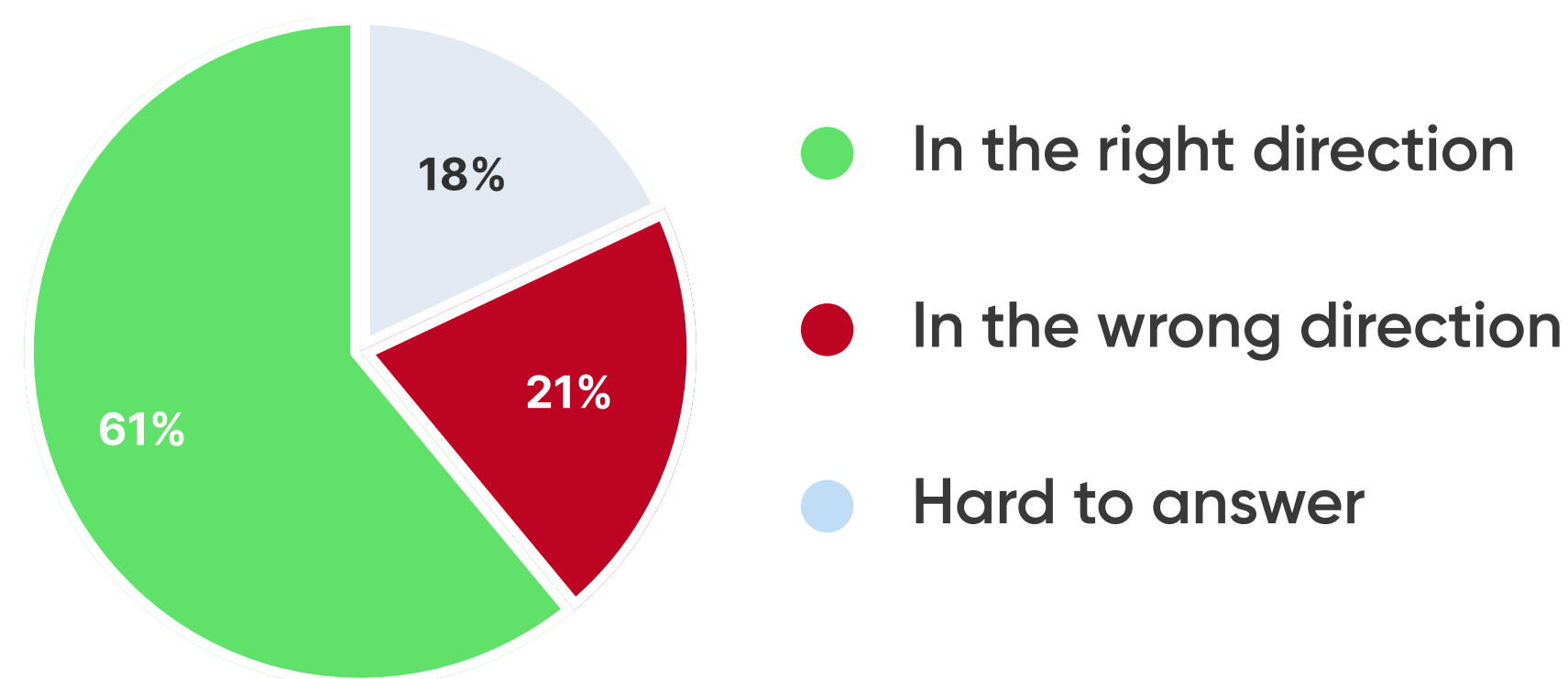
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Ukraine's progress in 2024

?

How reforms affect business

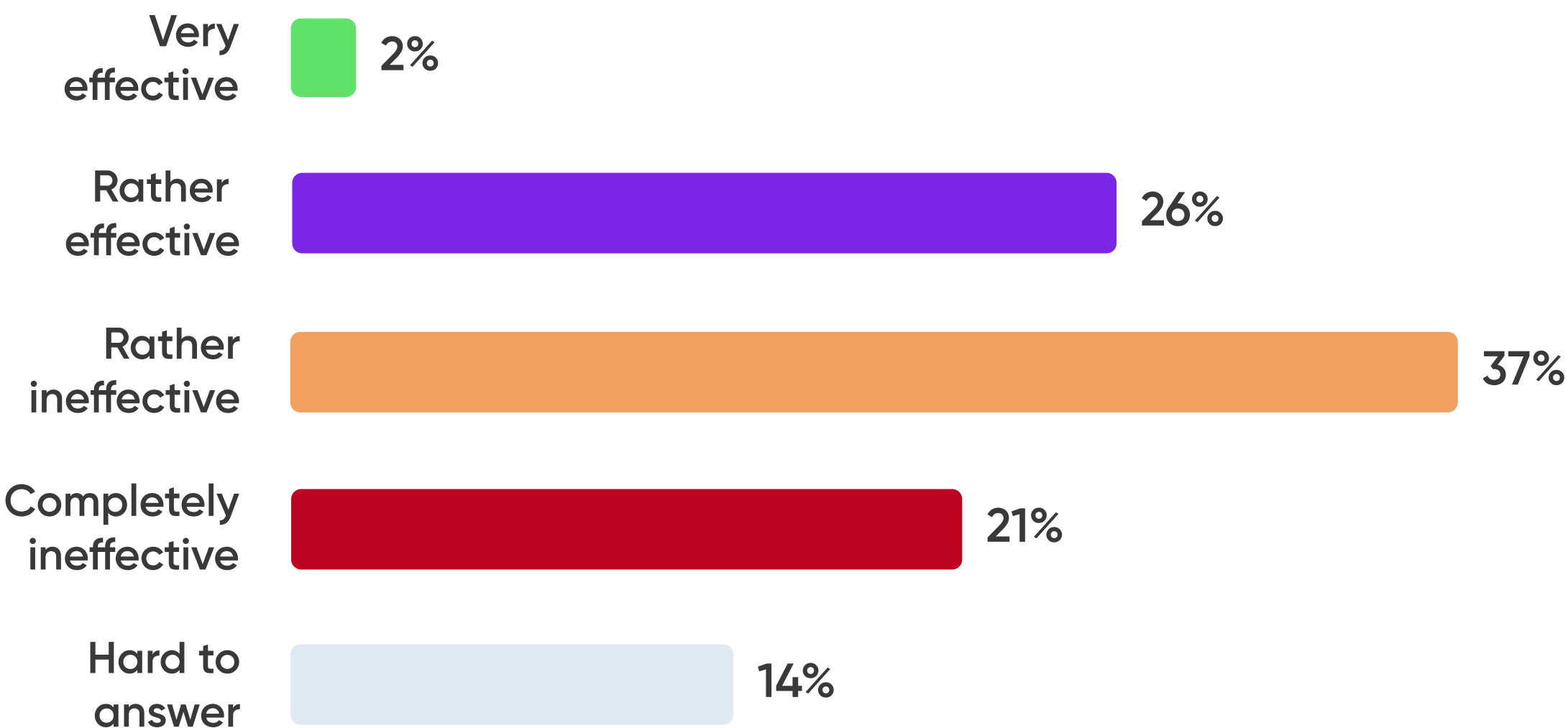
Do you believe that, overall, the process of implementing reforms in Ukraine in line with its *international commitments is moving in the right or wrong direction?



**International commitments primarily refer to obligations toward the EU, IMF, and World Bank.*

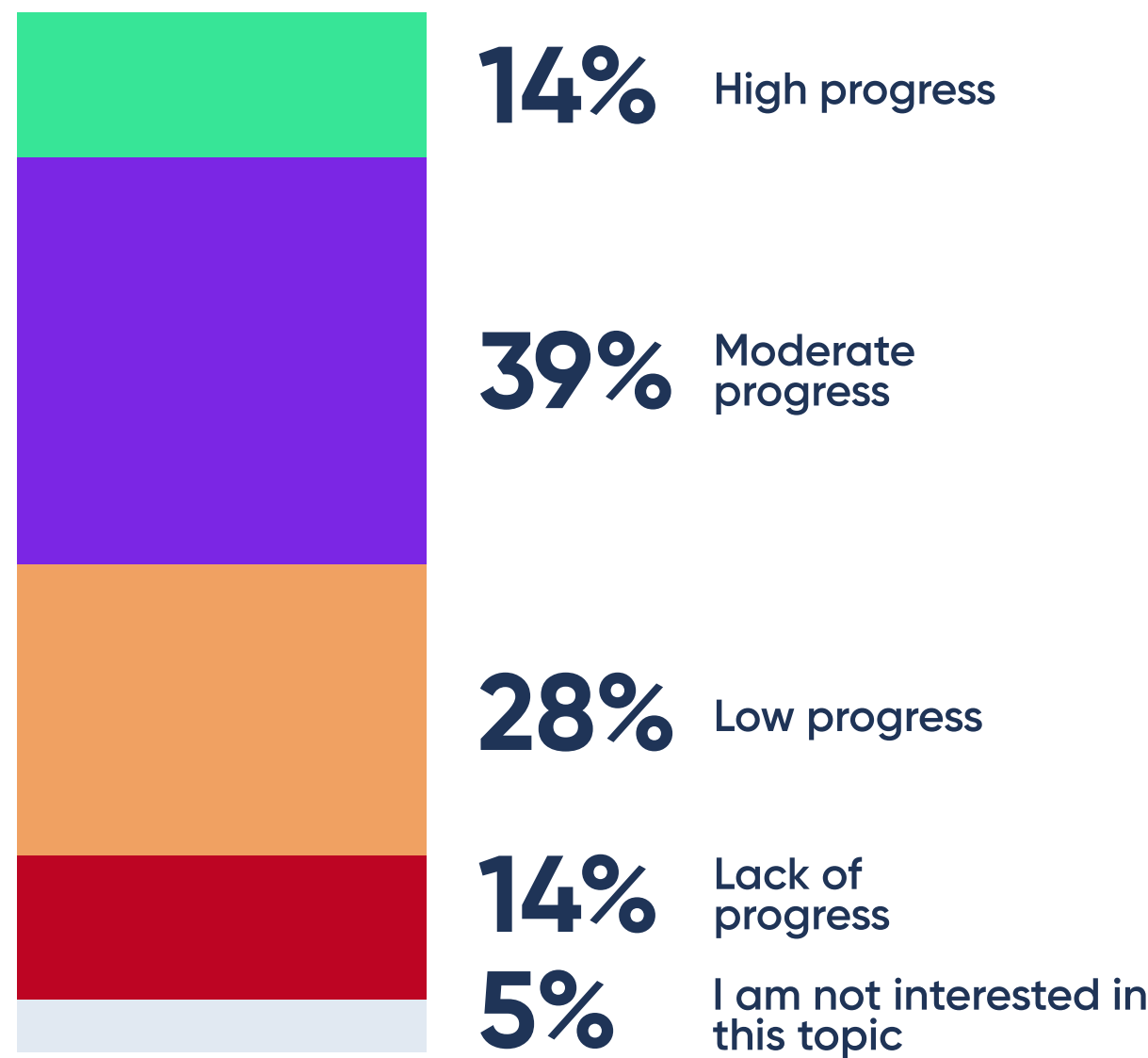
61% of respondents believe that the overall process of implementing reforms in Ukraine in line with international commitments is moving in the right direction, while 21% hold the opposite view.

How do you assess the overall effectiveness of the government led by Ukraine’s Prime Minister Denys Shmyhal in implementing reforms?



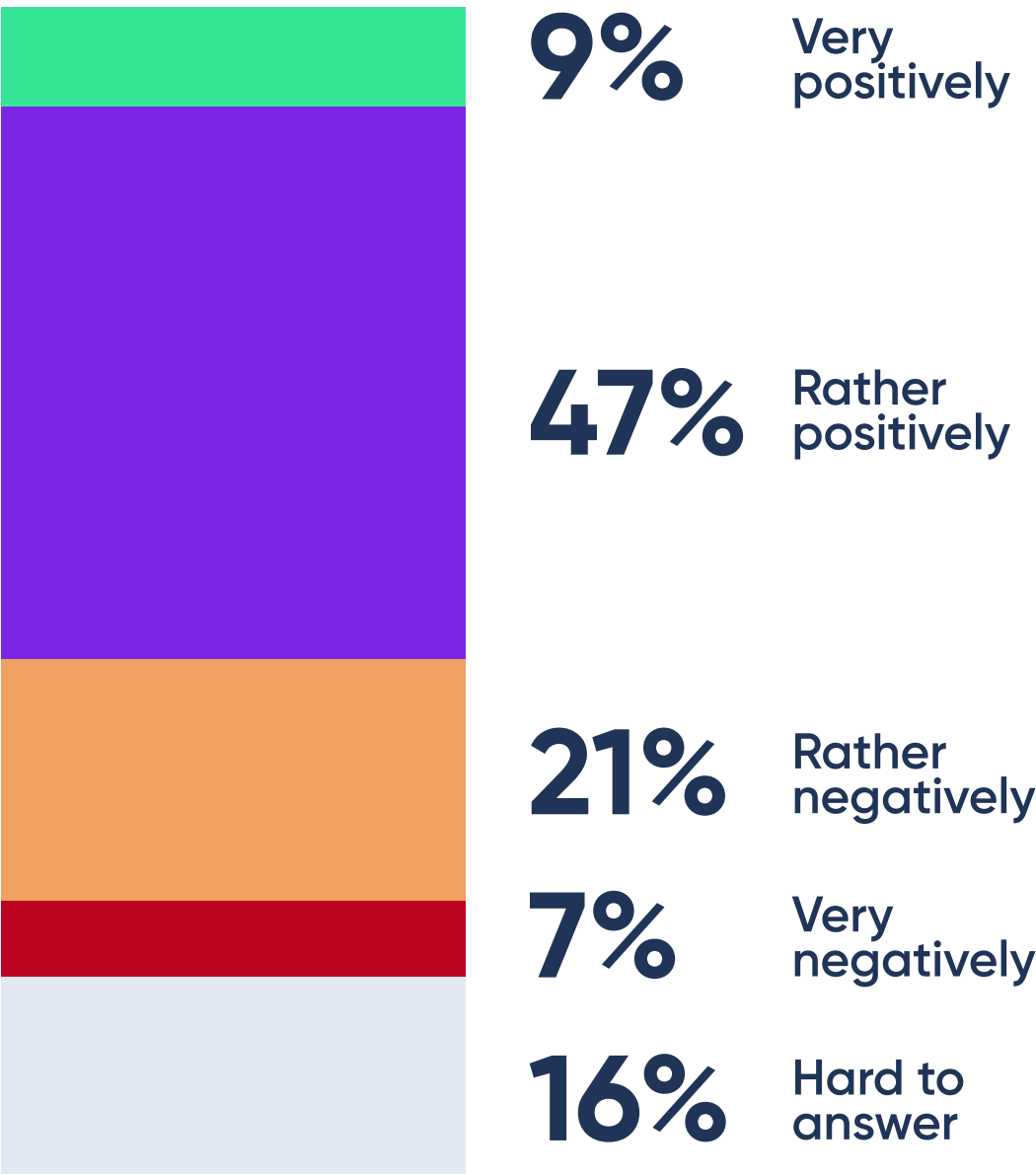
58% believe that the government under Prime Minister D. Shmyhal is ineffective in implementing reforms, with 37% rating its work as rather ineffective and 21% as completely ineffective. Overall, 28% of respondents consider the government’s reform efforts effective.

How do you assess Ukraine’s progress in 2024 in implementing reforms in accordance with its *international commitments?



**International commitments primarily refer to obligations toward the EU, IMF, and World Bank.*

How have these reforms affected your business?



39% of respondents assess Ukraine’s progress in implementing reforms in 2024 in line with international commitments as moderate. 14% give it a high rating, while another 14% believe there has been no progress at all.

56% of respondents perceive the impact of these reforms on their business positively: 47% rate it as rather positive, while 9% see it as very positive.

Political and Economic Situation

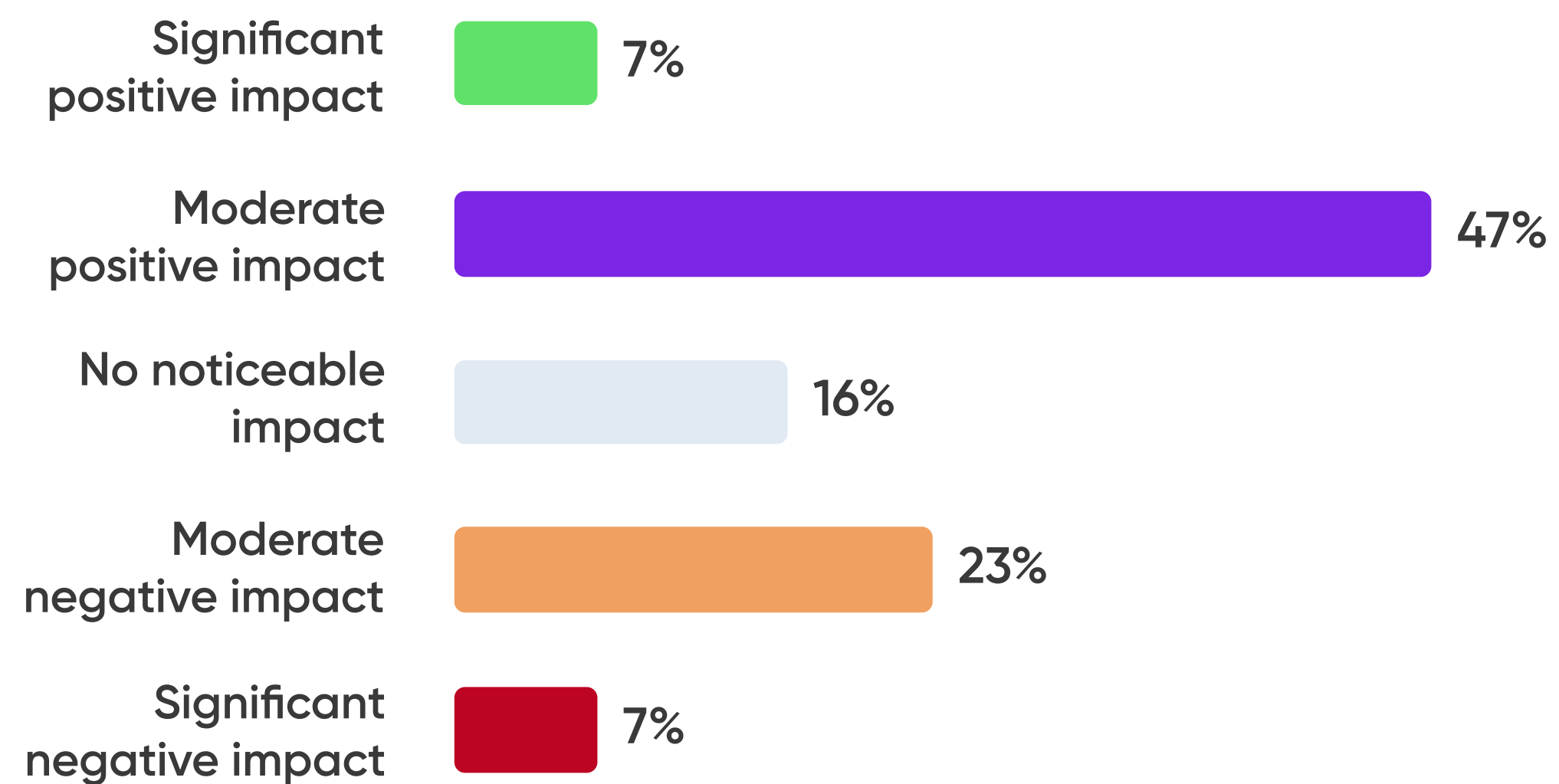


Impact of political changes
in the USA



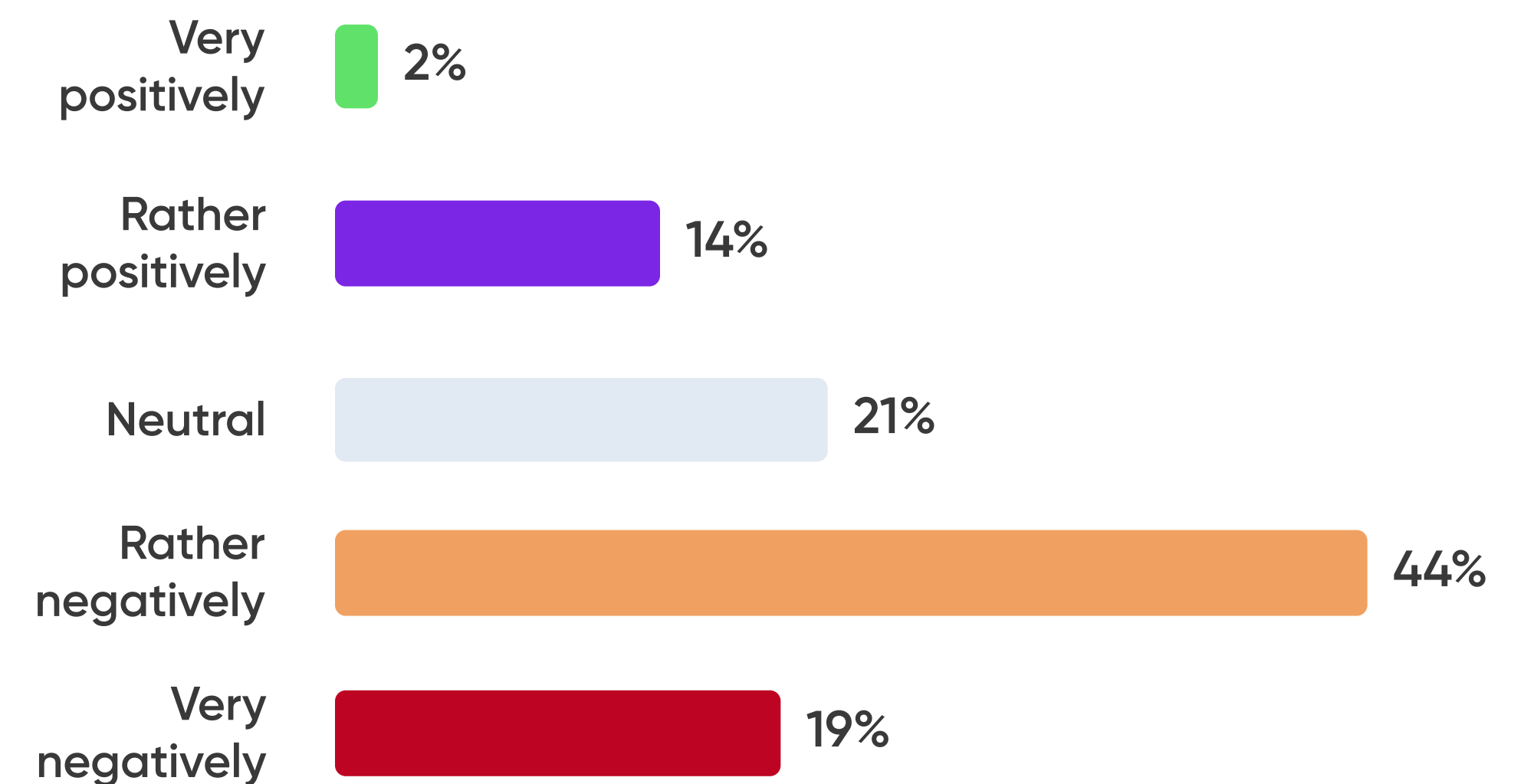
Economic situation of
Ukraine

How do you assess the potential impact of the new U.S. President Donald Trump on the political and economic situation in Ukraine over the next 12 months?



54% of respondents positively assess the potential impact of D.Trump on Ukraine's political and economic situation over the next 12 months. Among them, 47% believe Ukraine will experience a moderate positive impact, while 7% expect a significant positive impact. Meanwhile, 30% of respondents anticipate a negative impact.

How would you assess the impact of Ukraine's current economic situation on your business operations?



63% of respondents negatively assess the impact of Ukraine's current economic situation on their business: 44% consider it rather negative, while 19% see it as very negative. Only 16% view this impact as positive.

State Customs Service and State Property Management



Quality of work of the State
Customs Service



Efficiency of state
property management

How do you assess changes in the quality of work of the State Customs Service of Ukraine in 2024 compared to previous years?



- The quality of work has improved
- The quality of work has remained unchanged
- The quality of work has deteriorated
- Hard to answer

39% of respondents believe that the quality of work of the State Customs Service of Ukraine in 2024 remained unchanged. Meanwhile, 17% noted an improvement, and another 17% observed a deterioration in its quality.

How do you assess the effectiveness of state property management in Ukraine in 2024 compared to previous years?



- The situation has significantly improved
- The situation has rather improved
- The situation has rather deteriorated
- The situation has significantly deteriorated
- Hard to answer

36% believe that the effectiveness of state property management in Ukraine improved in 2024, while 32% think it worsened.



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Survey archive

Review

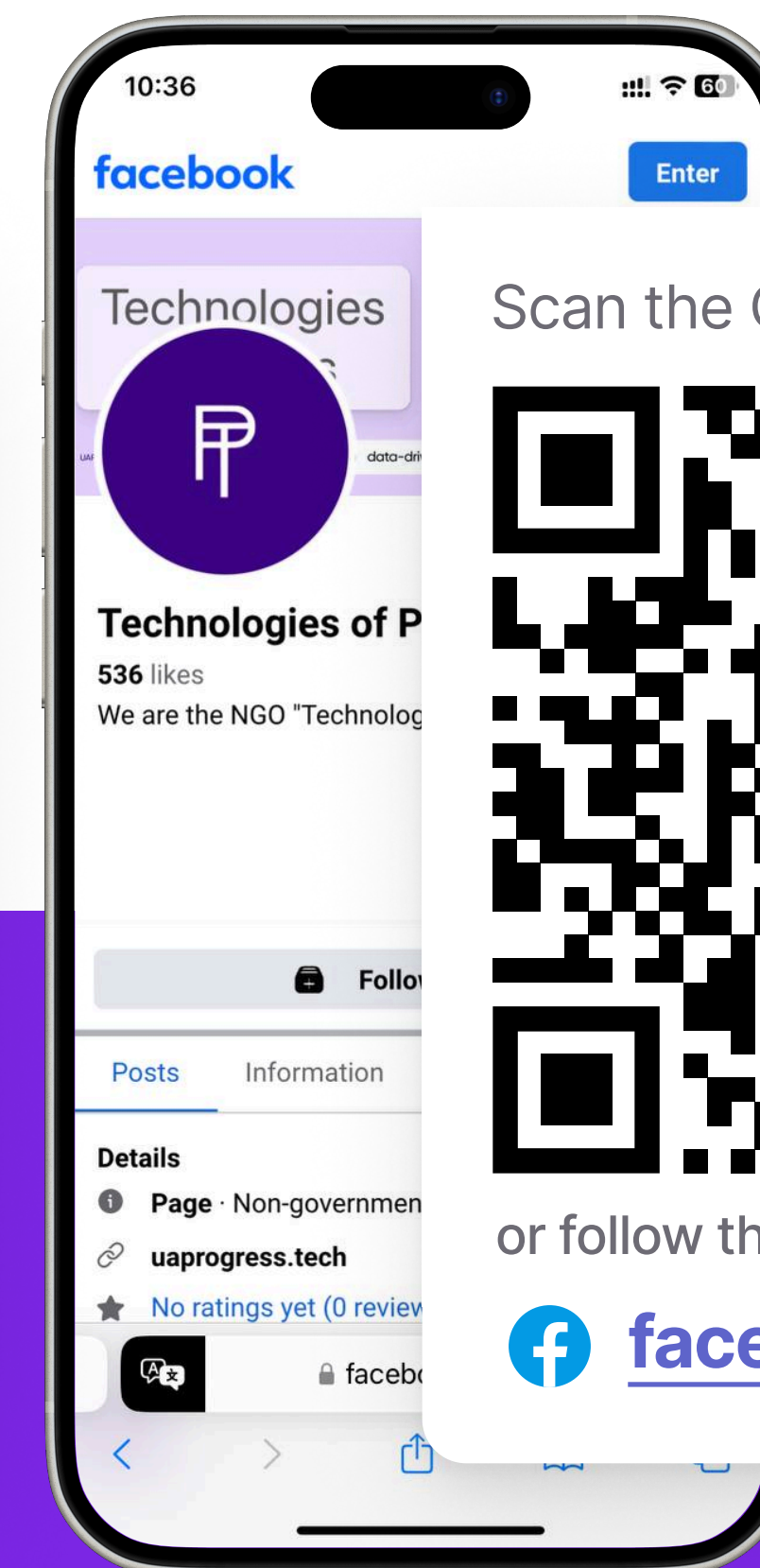


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