NATIONAL MANUFACTURING COMPANIES DURING WAR IN UKRAINE – RESEARCHING ACTUAL STATE AND NEEDS

Survey findings (July 2022)
This publication was developed by the Resource Efficient and Cleaner Production Centre based on the surveying national enterprises to uncover actual state of operation, changes in the direction of activities and new needs during war.

The survey focused on investigating actual state and needs of Ukrainian manufacturing enterprises. Based on the findings and data obtained, the opportunities to develop business support solutions to resume work, improve economic and environmental performance have been analysed.
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INTRODUCTION

The Resource Efficient and Cleaner Production Centre (RECP Centre) surveyed national manufacturing enterprises in the period June 2-July 29, 2022 with a focus to study their actual state of operation, changes in the direction of activities and needs during war. Based on the results obtained, the opportunities to elaborate business support solutions and help restore their capabilities, improve economic and environmental performance were analysed.

The survey consisted of the question blocks, namely:

a) Company profile;

b) Russian invasion impact on the operation of Ukrainian enterprises;

c) Problems and needs of the enterprise personnel since military actions;

d) Changes in products range and production processes;

e) Assistance required for Ukrainian enterprises to restore standard operations and directions for further development.

The survey was made among totally 72 Ukrainian manufacturing enterprises representing more than 20 industries. Although this number of respondents probably cannot show a true picture for all businesses, it is still a good option to analyse the situation and provide further steps.

METHODOLOGY

The RECP Centre invited Ukrainian enterprises to join the survey campaign through social networks, web pages, emailing from associations and direct contacts. The enterprises were not divided by geographical affiliation.

The online survey comprised 24 questions. Overall, 72 enterprises were surveyed, among them 11 (15.3%) large enterprises (>250 employees), 16 (22.2%) medium-sized enterprises (50-250 employees), 30 (41.7%) small (up to 50 employees) and 15 (20.8%) micro-enterprises (up to 10 employees). 51% of the respondents represented the management of enterprises, 26% their engineering staff, and the rest belonged to administration departments.

The participants of the survey represented such industries as food industry (15.3%), light industry (15.3%), machine building and metalworking (13.9%), production of building materials (11.1%), forestry (woodworking, furniture production) (9.7%) and others. When processing the results, general answers were taken into account, as well as answers distribution for large, medium-sized and small enterprises.

ACKNOWLEDGEMENTS

The Resource Efficient and Cleaner Production Centre is sincerely grateful to all companies participating in the survey, as well as to the associations and projects that helped to engage them into this process.
HIGHLIGHTS

Russian invasion to Ukraine resulted to a total of 52.8% surveyed companies reduced their activities, 23.6% stopped productions, and 2% of companies were forced to leave the regions of active hostilities. However, 16.7% of enterprises reported their activities have not undergone significant changes, except for the introduction of additional measures to ensure the safety of employees. Only three of the surveyed enterprises could increase their productions in current situation.

As for the ability of enterprises to resume normal operations in the next three months, the majority of enterprises (61.4%) reported it is possible, but with great difficulties. 15.7% of the surveyed enterprises will not be able to do it at all, and only 22.9% can come back to normal operation.

Highlighting the factors negatively affecting the overall operation of the enterprise in wartime, almost half of the respondents claimed the problems with products sales. Up to one third of the surveyed companies also mentioned problems with the loss of suppliers, lack of workers due to either forced displacement or military mobilization. Among other reasons, the respondents complained financial instability, low currency exchange rate, occupation, increase in the discount rate and others.

Only 9.7% of the surveyed enterprises kept the usual working hours for their employees. Also 19% of enterprises can be added to this group – they reported some of their employees are working remotely (those having such an opportunity), and the rest at their workplaces. This correlates with 16.7% of those enterprises who did not feel critical changes. At the same time, 38.9% of enterprises have employees going on vacations or are being idle, which also correlates with the data on enterprises that have suspended their activities (23.6%).

Many are adapting to modern realities, thus 74.6% of respondents marked the relevance of using online communications. Only slightly more than a third (38.6%) of enterprises would like to retrain their employees.

The vast majority of surveyed enterprises (69.4%) couldn't start the production of additional products. A number of enterprises reported attempts to organize the production of additional goods, develop various projects, search for partners in supply area, search for institutions dealing with the development of technologies in food industry and agriculture, etc. Some enterprises responded they were unable to launch the production of additional products.

When being asked about the general idea of the possibility to start producing extra goods, including for the needs of the army, the vast majority (58.1%) answered positively, but 36.1% of the surveyed enterprises complained the lack of appropriate equipment, 9.7% the lack of knowledge and technology, and 22.0% of respondents reported the impossibility to start up such productions.

The survey also comprised questions to clarify the reasons and circumstances that most negatively affected the enterprises and their productions during war. The vast majority of respondents (almost 76%) consider interruptions in the supply of raw materials, as well as troubles with using electricity (20.83%), natural gas, water supply and sewerage (11.1%) to be the main challenge.
The problems with efficient use of resources rank second after problems with supply. The survey also had to find out the availability of a strategy for the resource efficiency in productions during war. The majority of enterprises (56.3%) do not have such a strategy (at least informal), and 19.7% need assistance in its development.

71.4% of the surveyed enterprises reported the need for additional external investments for the replacement (modernization) of equipment for the purpose of re-profiling or modifying the range of products.

Regarding financial capability for the transition to use renewables, 53.5% of enterprises answered negatively and asked for the financial support. Only about 10% currently have the resources to master renewable energy or are already doing so. However, a little more than a third of respondents do not yet need such a transition or do not consider it appropriate with current productions.

The enterprises would like to receive assistance in restoring and coming back to normal operations, and among those consultancy on searching for financing to solutions that enhance energy efficiency of the enterprises (43% of respondents) as well as consultancy on searching for suppliers of technologies/equipment (32%) go first. Also, one third of the respondents need external assessment by experts and the development of resource efficiency measures.

For a quarter of surveyed enterprises the availability of reference books, sectoral manuals, collections of BATs and relevant trainings for staff remain quite relevant. A significant share of respondents are also interested in consultancy services on solutions to improve resource efficiency after relocation.

Surveying companies on awareness about governmental and non-governmental/donor business support programs in war times revealed that only 20.8% of those know and use governmental programs, while the number of enterprises that are aware and use non-governmental/donor programs is close to zero.

26.4% enterprises know but do not use governmental programs, and 13.9% – non-governmental and donor programs. Only 36.1% of the surveyed are not familiar with governmental programs, 66.7% have never dealt with non-governmental/donor programs, and 9.7% have not even thought about their availability. Also the proposal to receive a free “First Aid Package”, which provides for the development of priority (low-cost) measures to improve resource efficiency in productions became very relevant and drew the attention of 77.1% of the surveyed enterprises.
**FINDINGS**

**Hostilities affecting national enterprises and their activities**

The survey brought together 11 (15.3%) large enterprises (>250 employees), 16 (22.2%) medium-sized (50-250 employees), 30 (41.7%) small (up to 50 employees) and 15 (20.8%) micro-enterprises (up to 10 employees), thus making overall 72 enterprises.

*The size of surveyed enterprises*

![Pie chart showing the distribution of enterprise sizes: Large (41.7%), Medium (20.8%), Small (15.3%), Micro (22.2%).]

The respondents represented such industries as food industry (15.3%), light industry (15.3%), machine building and metalworking (13.9%), production of building materials (11.1%), forestry (woodworking, furniture production) (9.7%) and others. When processing the findings, general answers were taken into account, as well as answers distribution for large, medium-sized and small enterprises.

Among large enterprises, 30% belong to metallurgy and machine building, and 18% to light industry and production of construction materials. In addition, there were enterprises representing food, mining and energy industries.

Medium-sized enterprises in the survey are mainly represented by machine building and metalworking (19%), forestry (woodworking, furniture production) (19%), and light industry (13%). Among others, there were food, transport, chemical, paper and other industries.

As for the surveyed small enterprises, food and light industry enterprises represent 20% each. Machine building and metal processing enterprises (together), as well as enterprises producing construction materials are having 10% each. In addition, there are enterprises of forestry (woodworking, furniture production), transport, paper and other industries.
As a result of Russian invasion, 52.8% of the surveyed enterprises reduced their activities, 23.6% stopped activities at all, and 2% were forced to leave the regions of active hostilities (relocate). However, 16.7% of enterprises reported their activities have not undergone significant changes, except for the introduction of additional safety measures for the employees. Only three of the surveyed enterprises were able to increase productions in current situation.

Among surveyed enterprises, large ones mostly reduced production (75%) or stopped working at all. As for medium-sized enterprises, the share of those that stopped their activities reaches 50%; only one enterprise did not undergo changes, and one increased its productions. Small enterprises also mostly reduced their activities (87%); 2 enterprises stopped their activities’ one managed to relocate and one did not report any special changes in its activities.

Thus, it should be noted that the hostilities have had the most negative impact on the activities of medium-sized enterprises and many of them have ceased operations, while the vast majority of large and small enterprises continue to operate, slightly reducing their overall productions.

Russian invasion and its affect over the companies’ activities

- The company has reduced production
- The company has increased production
- In general, no changes, except for the introduction of additional safety measures for employees
- The enterprise has stopped
- The enterprise was forced to leave the region of hostilities
Regarding the ability of enterprises to resume normal operations in the next three months, most of them (61.4%) consider it possible, but will face many troubles. 15.7% of the surveyed enterprises will not be able to do it at all, and only 22.9% can come back to normal operation.

Large enterprises that will mostly be able to resume their activities are only 18%; while 59% will be able to resume their activities with significant costs; and, unfortunately, 23% will not be able to do it at all.

As for medium-sized enterprises, the share of those being able to resume their activities reaches 25%, and the same share will fail to do. For 50% of the surveyed enterprises, recovery is possible, but with challenges.

Small enterprises will also mostly be able to come back to normal activities and 20% answered positively; 68% will be able to resume their activities with significant costs, and 12% will fail to do so.

Thus, it should be concluded that the vast majority of large and small enterprises will be able to come back to normal activities, although most with considerable difficulties. Among medium-sized enterprises, many of which have ceased operations, 20% will not be able to resume operations in the next 3 months.

*The capacity of enterprises to resume normal operation in the next three months*
War-related negative factors affecting enterprises

Almost half of the respondents reported problems with product sales as the key factor that negatively affected the overall work of the enterprise in wartime. Up to 30% of the surveyed enterprises also claimed losing their suppliers, lack of workers due to forced displacement or mobilization. Among other reasons, the respondents mentioned financial instability, low exchange rate, occupation, discount rate increase and others.

If considering the size of the enterprise as the affecting factor, then 75% large enterprises reported the loss of suppliers and sales problems as the main challenge.

As for medium-sized enterprises, 48% of them mentioned the loss of suppliers as the main obstacle, and 64% claimed the lack of workers due to their forced displacement and mobilization as the main factor that had the most significant impact on the overall performance.

At the same time, small enterprises faced primarily sales problems (for 83% of the surveyed enterprises), 43% reported troubles with losing suppliers, and 15% claimed the lack of workers caused by their forced displacement or mobilization.

Thus, depending on the size of enterprises, the factors that most significantly affected the overall work in wartime environment really differ. Large enterprises claimed mainly supply problems; medium-sized enterprises claimed the lack of employees; and small enterprises reported sales problems.

**Negative factors having the most significant effect on the overall performance in wartime, %**
Challenges and needs of the personnel since the hostilities started

Only 9.7% of the surveyed enterprises kept the usual working hours for the employees. 19.0% reported some employees work remotely (who have such an opportunity), which correlates with 16.7% of enterprises that did not experience critical changes.

38.9% enterprises are having employees gone on vacations or the enterprises are idle; 23.6% suspended their activities.

36% of large enterprises are having some employees working remotely (if possible), the rest remain working at their workplaces. 27% of enterprises reduced total working hours, 18% have employees on a forced leave or downtime. And only one company reported the war did not affect the work of its employees.

Among medium-sized enterprises, 38% have employees on a forced leave or downtime. 25% of enterprises reduced working hours, 13% of employees are working remotely. And only two companies reported no changes in the work of its employees because of war.

The tendency is approximately the same for small enterprises, where 43% have employees on a forced leave or downtime; 30% reduced working hours, the employees switched to remote work at 10% of the enterprises. And only one enterprise has no changes in the work of its employees during war.

Hostilities affecting working hours of employees

- Working hours reduced: 26.4%
- Downtime/vacation: 38.9%
- Some employees work remotely (if possible), the rest at their workplaces: 19.4%
- No affect so far: 9.7%
- Other reasons: 5.6%
The Ukrainian population is adapting to modern realities, and thus 74.6% of respondents reported the relevance of using online communications. Thus, in favour of such communications are 72% of large enterprises, 88% of medium-sized enterprises, and only 60% of small enterprises.

If we assess the relevance of retraining the employees at the enterprise, the survey revealed that a little more than a third of the surveyed enterprises (38.6%) would like to do it. For large enterprises this figure is 45%, for medium-sized 38%, and for small ones only 30%.

Changes in the product range and productions

The vast majority of Ukrainian enterprises (69.4%) have not launched the production of extra products, including for the needs of the army, while 25% of respondents answered positively. A number of enterprises report the attempts to launch the production of extra products, developing projects, searching for partners in the supply of house kits for low-rise buildings, searching for R&D institutes dealing with the development of technologies in food industry and agriculture, etc.

According to the survey, small enterprises appeared to be more skilled and trained when facing such challenges. Thus, the share of companies that produced additional products for small enterprises amounted to 30%, for large 27%, and 18% for medium-sized. This can be explained by the ability of small enterprises to be more flexible.
The RECP Centre used the survey to ask another clarifying question for those enterprises incapable to produce extra products, so the question was considering such an option at all. The vast majority of enterprises (58.1%) thought of this idea, but 36.1% claimed the lack of appropriate equipment, 9.7% claimed the lack of knowledge and technology, and 22.2% claimed no chances to launch such production.

As for large enterprises, 55% of them thought to start the production of extra products, including for the needs of the army, while among medium-sized enterprises this percentage increases to 69%.

Only 26% of small enterprises did not even try to launch any production aiming to help the Ukrainian army survive, but what is promising is that the majority of enterprises strive to contribute to the victory in this aggressive war in every possible way, but they lack equipment, knowledge or technology. However, some enterprises feel helpless to replicate this experience.
64.3% of enterprises really need to purchase new equipment since the beginning of war in Ukraine. Among large enterprises only 18% replied “Yes” to this question, for medium-sized enterprises this percentage increases to 80%. Only 30% of small enterprises feel no need to purchase new or additional equipment.

As for the reasons and circumstances that had the most negative impact on enterprises and their productions during war, the vast majority of respondents (almost 76%) consider interruptions in the supply of raw materials and supplies to be the main challenge. However, problems with the consumption of electricity (20.83%), natural gas (11.1%), water supply and sewerage (4.17%), problems with waste management, including hazardous waste (4.17%) were also quite significant. Up to 20% of respondents reported these factors.

Regarding other problems, the respondents mainly reported the decrease in sales due to the supply of large quantities of humanitarian products, destruction of production facilities, shutdown of the enterprise, etc.

Among large enterprises, 81% reported the supply of raw materials as the main challenge, some enterprises have problems with sales even to the complete absence of orders. Also, about 20% of enterprises claimed troubles with the use of natural gas and electricity, waste management, including hazardous waste.

Almost all surveyed medium-sized enterprises face the problem with the supply of raw materials.

80% of small enterprises also claim the supply of raw materials as the main problem, 30% have troubles with electricity consumption. Thus, we see that the choice of these factors does not depend on the size of the enterprise.
Negative factors affecting the enterprise and its activity during war

- Problems with the supply of raw materials
- Problems with the use of electricity
- Problems with the use of natural gas
- Problems with water supply and sewerage
- Problems with waste management, including hazardous waste
- Other problems

How enterprises plan to enhance resource efficiency

The surveyed enterprises report the problems with resource efficiency rank second in priority after the problems with supply. The enterprises were asked if they had a strategy for the efficient use of resources during war. The majority (56.3%) do not have it, and 19.7% need assistance to develop one.

Only one third of large enterprises stated they have and are guided with such a strategy, 20% need support in its development. Medium-sized enterprises mostly have such a strategy and 56% of enterprises reported they have a kind of a strategy. Among small enterprises 52% negatively replied as for the strategy availability, and half of them asked for assistance in its development.

Availability of the "Strategy for the effective use of resources during the war"
The need for extra external investments to replace (or modernize) equipment for further re-profiling or changing the range of products reported 71.4% of the surveyed enterprises. Large companies feel no need to do so and only 4 enterprises claimed the need for additional investments. At the same time, 81% of medium-sized and 80% of small enterprises need additional external investments to replace (modernize) equipment for re-profiling or changing the product range.

**Need for extra external investments to replace (modernize) equipment for further re-profiling or modifying the product range**

The survey also had a goal to figure out the purposes of using financial resources for modernization. For example, regarding the availability of financial resources for the transition to using renewable energy sources, the answer “no resources available, looking for financial support” was given by 53.5% of enterprises. Only about 10% currently have the resources to master renewables or are already doing so. However, a little more than a third of the respondents in the current conditions do not need such a transition or do not consider it expedient with the existing productions. Also, several companies are interested in partners who could offer such mechanisms for their customers.

A significant number of large enterprises (46%) have available financial resources for the transition to utilize renewable energy sources. As for medium-sized enterprises, the number is much smaller – only 38%. Only one third of small enterprises do not need such support, and only 2 small enterprises receive it. Thus, 45% of large enterprises, 50% of medium-sized and 63% of small enterprises are looking for financial support in this domain. This leads to the conclusion that it is necessary to help small and medium-sized enterprises to find financial resources for the transition to renewable energy sources and justify the effectiveness of such an action.
Regarding the availability of emergency power supply systems (EPSS), which is an extremely urgent need of enterprises during war, only 14.3% of enterprises were able to get such units. In search for financial support to get EPSSs are 50% of surveyed enterprises, which illustrates that the problem requires immediate solution with the assistance of relevant institutions and organizations.

The surveyed enterprises were asked a question if they were ready to continue activities on improving resource efficiency in productions (efficient use of energy, materials, and water). 88.9% of enterprises gave a positive answer, among them 89% large companies, 100% medium-sized and 87% small, respectively.

The vast majority of enterprises are planning to increase their resource efficiency and this fact obliges them to specify the type of assistance they will need first of all to put these plans into practice.
Continuing work on improving resource efficiency

**Assistance to enterprises required to restore activities and improve resource efficiency**

Among various types of assistance that enterprises would like to receive aiming to restore normal operations, firstly go (1) consultancy services on searching for sources to finance solutions for resource efficiency improvement (43% of respondents), and (2) consultancy services on looking for suppliers of technology/equipment (32%). Also, one third of respondents need an external assessment by experts and working out resource efficiency measures.

For a quarter of surveyed enterprises, the availability of reference books, sectoral manuals, collections of BATs and relevant trainings for the staff remain relevant. A significant share of respondents is also interested in consulting on solutions to improve resource efficiency of the enterprise after relocation to safer regions.

When assessing the needs taking into account the size of the enterprise, 58% of large enterprises reported an external assessment by the experts and the development of resource efficiency measures is the main need, 37% are interested in staff trainings, and one third are interested in other types of consultancy on resource efficiency.

As for medium-sized enterprises, 75% claimed the main need for advice on finding financing sources for solutions to improve resource efficiency, whereas 55% are interested in the external expert assessment and the development of resource efficiency measures.

Instead, small enterprises primarily need to get familiar with reference books, sectoral guides, collections of the BATs for enterprises (67%). Half of the surveyed small enterprises need advice on searching for sources to finance solutions for resource efficiency improvement, consultancy on finding suppliers of technology/equipment, and 30% need an external assessment by experts and the development of resource efficiency measures.

Thus, depending on the size of enterprises, the needs arising among enterprises to improve their work in wartime environment do vary. For large enterprises it is mainly the need for external assessment by experts and the development of resource efficiency measures; for medium-sized enterprises it is the consulting on searching for sources to finance solutions for resource efficiency improvement; and small enterprises claim familiarization with reference books, sectoral manuals and guides, collections of BATs.
Regarding the forms of additional assistance, it should be noted that enterprises need mainly consultancy assistance (57%), i.e. search for new markets, supply channels, organization of production; financial assistance (44%); preparing the enterprise and its staff to work during hostilities (20%), namely arranging bomb shelters, food stocks, use of alternative energy sources, checking out evacuation exits, fire extinguishers, etc. The enterprises also request the need for trainings (training in first aid, rules of handling explosive objects, psychological rehabilitation), grant, investment, technical and other support.
The survey also focused to get to know about the awareness of governmental and non-governmental/donor business support programs during the war. Thus, only 20.8% enterprises know and use governmental programs, and the number of those aware of non-governmental/donor programs and using those is close to zero.

26.4% enterprises know but do not use governmental support programs, and as for non-governmental and donor programs – 13.8% of the surveyed. If only 36.1% of the surveyed enterprises are not familiar with governmental programs, then 66.7% of respondents have never dealt with non-governmental/donor programs, whereas 9.7% have not even thought about their existence. Therefore, the task of familiarizing enterprises with such opportunities seems very relevant.
The awareness of large enterprises with governmental business support programs is quite high, only 27% of enterprises haven’t heard about them. However, only 27% of respondents also use such opportunities. As for non-governmental and donor programs, only 45% of the surveyed large enterprises know they are available, but none of them use them.

Medium-sized enterprises have lower awareness of governmental business support programs compared to large ones. 38% of respondents have heard about such programs but do not use them, and only one enterprise does. As for non-governmental and donor programs, only 2 enterprises know about them and none takes advantage of them.

Half of small enterprises are aware of governmental business support programs and even 30% are already using them. However, awareness of non-governmental and donor programs among small enterprises is low, only 17% know about them and 10% use this option.

Therefore, it is necessary to organize consultancy services primarily on non-governmental and donor programs. Currently none of the surveyed large and medium-sized enterprises use such programs.
The proposal to receive a free “First Aid Package”, which provides for the development of priority (low-cost) measures to improve resource efficiency in productions, is quite relevant for Ukrainian enterprises. 77.1% of surveyed ones are interested in such assistance: 100% large and medium-sized each, and 73% small enterprises.

*Need to develop priority (low-cost) measures to improve resource efficiency in productions*

In responses to the survey, 64% of enterprises asked to be timely informed of the opportunities to get involved and participate in the international programs implemented by the RECP Centre in Ukraine.
FURTHER STEPS

At time being the Ukrainian industry is facing the task to survive, withstand during the hostilities, possibly to relocate enterprises or change the range of products, adjusting itself to the realities of today (including assistance to the Ukrainian army, temporary migrants, socially vulnerable groups). This will allow defeating the enemy, prepare for post-war reconstruction, using own potential (including human), and increase the share of presence in the world market. In fact, this is a challenge, given the aggressive attempts of the occupation army to destroy Ukrainian enterprises, logistics, and energy generating and supply systems. And this challenge requires consolidating the efforts of all stakeholders, and these are the industry, government, foreign partners, expert and international institutions.

Also, the situation of today requires the need to increase energy independence of Ukrainian enterprises, improve the resource efficiency, and the RECP Centre in the role of a national organization that supports eco-modernization of the national industry through the introduction of resource efficient and cleaner production concept, will continue to support Ukrainian enterprises in such challenging environment by expanding cooperation between partners and adapting its activities to modern challenges.

The survey findings showed that large, medium-sized and small enterprises differ in their problems, needs and opportunities. The assistance they need is also somewhat different. The surveyed large and small enterprises have mostly reduced their activities since the hostilities started. As for medium-sized enterprises, half of them stopped working, and that means these enterprises appeared the least flexible. The reason is simple, as large enterprises have better capabilities (processes, structures, personnel) to find new markets, new suppliers (including foreign ones), technologies, support programs. Small enterprises proved to be more flexible, adapting to market needs and changing conditions. However, depending on the size of the enterprises, the needs they have to improve their work in wartime conditions were indeed different. Large enterprises mainly need external experts’ assessment and the development of resource efficiency measures; medium-sized enterprises require basically consultancy on searching financing for solutions to improve resource efficiency; and small enterprises need to get familiar with reference books, sectoral manuals, BATs collections.

Hence, the RECP Centre’s assistance to enterprises of different sizes will also be somewhat different. For large enterprises, it will be feasible to implement targeted and time-limited resource efficiency measures, individual assessments of production sites or equipment, short- and medium-term programs to improve the skills of employees (in specific resource efficiency tasks). The Centre is well equipped with instruments and tools to perform specific assessments and measurements, to provide services for energy audits of the enterprise (energy audits type 2 and 3), to assess buildings and facilities with thermal imaging camera, to carry out electrical measurements (0.4 kV), and quantitative measurement of combustion products.

According to the survey, small and medium-sized enterprises need more assistance, so the RECP Centre will focus its activities on this target audience. The Centre will continue to advise enterprises on improving their resource efficiency, on searching financing for resource efficiency solutions by attracting new partners and donors. Since the main negative factors affecting the work of enterprises were most often identified as problems with sales of products, loss of suppliers, lack...
of workers due to their forced displacement, the RECP Centre is able to offer advice on sales, exports and organization of production, with an emphasis on finding opportunities to finance their resource efficiency measures.

For SMEs, short-term assessments by external experts provide tangible results in improving resource efficiency, but often do not become their sustainable practice. More than half of small enterprises do not have a strategy for the efficient use of resources in productions during war and need assistance in developing it. Therefore, it seems quite feasible to put in place longer-term cooperation with recurrent communication (live or online) on progress and further plans, developing resources efficiency strategies, for example, in the format of clubs, networks, etc.

Small enterprises reported the relevance of using manuals and BATs collections developed by the RECP Centre. However, to simplify the perception of information, work is underway to introduce alternative forms of information presentation in the form of a set of small materials (including videos) with easy navigation.

It is also worth mentioning that national enterprises are poorly aware of governmental and especially non-governmental support programs, as this offsets significant efforts of their providers and blocks development opportunities. Awareness of large enterprises as for governmental business support programs is quite high, a little worse for non-governmental and donor programs. But awareness of governmental business support programs among small and medium-sized enterprises is lower among large ones (only one third have heard about such programs). As for non-governmental and donor programs, only a few enterprises know about their existence, and no medium-sized enterprise uses them. This confirms the fact that despite the availability of many different online information platforms with aggregation of programs in Ukraine, their efficiency is not very high. The RECP Centre will use its direct contacts with industry to communicate these opportunities, as well as cooperate with government agencies and NGOs to develop a mechanism to effectively inform SMEs.

As for ensuring support to enterprises in restoring their normal operation, many of the surveyed companies reported the need to receive a free “First Aid Package”, which provides for the development of priority (low-cost) measures to improve resource efficiency in productions. The RECP Centre is ready to assist such initiatives by involving its experts and partner organizations.
NATIONAL MANUFACTURING COMPANIES DURING WAR IN UKRAINE – RESEARCHING ACTUAL STATE AND NEEDS

This publication was initiated and developed by the Resource Efficient and Cleaner Production Centre based on the survey findings (the survey was carried in July, 2022)

The Resource Efficient and Cleaner Production Centre promotes the concept of resource efficient and cleaner production in Ukraine focusing on improving the efficient use of energy, water and materials in industrial productions through the introduction of technical and organizational RECP measures

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