

CONTENTS

Foreword	iii
Preface	v
Acknowledgements	vi
List of boxes, figures and tables	viii
List of abbreviations	ix
EXECUTIVE SUMMARY.....	1
INTRODUCTION	5
PART I HOUSING SECTOR	13
CHAPTER I LEGAL, INSTITUTIONAL AND POLICY FRAMEWORK FOR HOUSING	13
A. Legal framework for housing	14
B. Policy and institutional framework	16
CHAPTER II HOUSING CONDITIONS	19
A. General Overview of the Housing Stock	19
B. Housing ownership	19
C. Housing tenure	19
D. Quality of housing.....	21
E. Access to utilities	21
F. Energy efficiency	22
G. Market for maintenance services	23
H. Tariff setting and affordability of housing costs	23
CHAPTER III HOUSING ALLOCATION, NEEDS, DEMAND AND SUPPLY	25
A. Demographic situation	25
B. Housing consumption	25
C. Housing Supply.....	28
D. State supported housing programmes	30
PART II SPATIAL PLANNING AND LAND MANAGEMENT	35
CHAPTER IV SPATIAL PLANNING AND URBAN DEVELOPMENT	35
A. Legal, policy and institutional framework	35
B. System for granting permits for preparatory-construction activities and actual construction work.....	39
C. Urban planning documentation	40
D. Spatial development trends and planning responses.....	40
CHAPTER V LAND MANAGEMENT AND REGISTRATION SYSTEM	49
A. Legal framework for land administration	49
B. Institutional framework for land administration	50
C. Land Reform	52
D. Spatial reference system and topographic mapping.....	53
E. Cadastre	54
F. Real Estate Market.....	56
PART III FINANCIAL FRAMEWORK FOR THE HOUSING AND LAND SECTORS	59
A. Availability of housing finance	59
B. Affordability of housing.....	61
C. Role of central and local executive bodies in housing financing.....	61
RECOMMENDATIONS	69
ANNEXES	81
Annex I - Demography indices, 1990, 1995 and 2000-2012	81
Annex II - Basic indicators on labour market	82
Annex III - Population below relative national poverty line (%)	83
REFERENCES	85

LIST OF BOXES, PICTURES, FIGURES AND TABLES

BOX

1. Geographic coordination of a regional development strategy: The case of Khmelnytskyi oblast	42
--	----

PICTURES

1. Dnipro River Dnipro River	11
2. House framework	13
3. Soviet-era apartment building and a new construction	18
4. Energy efficiency in housing construction	23
5. A social housing under construction	24
6. Multi-apartments buildings constructed under the State's housing programmes	32
7. Rows of multi-apartment buildings with playground and parking	48
8. An apartment building under construction	58
9. A social housing under construction	80

FIGURES

1. Map of Ukraine	5
2. Governmental structure of Ukraine	9
3. Ukraine's houses by period of construction as of 1 January 2013	21
4. Public sector share in the overall housing output in Ukraine, 2000-2009	29
5. Housing output in Ukraine, 1985-2011	29
6. Number of unfinished construction sites as of 1 January 2013 (by year of commencement of construction)	30
7. Territorial planning in the national system of strategic planning	43
8. From land use planning to spatial planning: securing a spatial integration of different strategies and policies (regional level)	44
9. Kyiv Development Strategy until 2025	44
10. Strategic territorial planning and socioeconomic development strategy of Kyiv	45
11. Egan Wheel for sustainable community	47
12. Structure of the State Agency of Land Resources	52
13. Land use in Ukraine as of 1 January 2011	54
14. Annual capital investments and investments in housing at current prices	60
15. Level of government assistance by target group	74

TABLES

1. Population distribution in urban settlements, 2001	6
2. Population in 1991 and 2001-2013	7
3. Average household size, 1999-2012	8
4. GDP per capita in USD, adjusted by purchasing power parity, at 2005 price levels	10
5. Characteristics of households' housing consumption as of 1 January 2013	20
6. Hostels by ownership type as of 1 January 2013	20
7. Per cent of housing units equipped with basic utilities as of 1 January 2013	22
8. Rates of change for selected population and housing indicators, 2001-2011	25
9. Percentage of Ukraine's households living in one-room dwellings in 2013, in %	26
10. Housing allocation to households in the waiting lists	27
11. Key legislation in place	50
12. Agro-formations in Ukraine as of January 2011	53
13. Average prices for secondary-market apartments in Ukraine's largest cities in 2012	62
14. Assets and deposits of the Ukrainian banking sector	64

LIST OF ABBREVIATIONS

BTI	Bureau of technical Inventory
CMU	Cabinet of Ministers of Ukraine
EU	European Union
EU-27	European Union of 27 Member States
EUREF	Reference Frame Sub-Commission for Europe
FCBU	First Credit Bank of Ukraine
Gcal	Gigacalorie
GDP	Gross Domestic Product
GNSS	Global Navigation Satellite System
GTZ	German Partnership for Technical Cooperation
GVA	Gross Value Added
Habitat II	The Second United Nations Conference on Human Settlements
HOA	Homeowners' association
KMDLR	Kyiv Main Department of Land Resources
kWh	kilowatt-hour
LTV	Loan-to-value
m²	square meters
MBS	Mortgage-backed securities
MFI	Micro-finance institution
MinRegion	Ministry of Regional Development, Construction, Housing and Communal Services
MoAF	Ministry of Agrarian Policy and Food
MoJ	Ministry of Justice
NARDA	National Regional Development Agency
NERC	National Electricity Regulation Commission
NGO	Non-governmental organization
NSDI	National geospatial data infrastructure
PPP	Public-private partnership
ROI	Return of investment
SALR	State Agency of Land Resources
SGN	State Geodetic Network
SLC	State Land Cadastre
SMI	State Mortgage Institution
SSSU	State Statistics Service of Ukraine
UAH	Ukrainian hryvnia
UNECE	United Nations Economic Commission for Europe
UNIA	Ukrainian National Mortgage Association
UNIAN	Ukrainian Independent Information Agency
USAID	United States Agency for International Development
USD	United States dollar

Exchange rate : 1 USD = 8 UAH (March 2012)