

Rebuilding Ukraine: Austria's Red-White-Red Approach

*Point of Contact for
Ukraine Reconstruction*
21st April 2026



Austria and Ukraine – Facts & Figures

USD 588 billion

estimated reconstruction needs (World Bank)

Economy

6th

largest investor

1.000

companies

200

regional offices

25.000

creating jobs

Support (in EUR)

~351 mil.

bilateral fin. & hum. aid

1.5 bil.

AT assistance via EU

154 mil.

AT participation EPF*

*EPF: European Peace Facility, AT participation only for non-lethal equipment

Wiederaufbaubedarf – RDNA 5 Weltbank

RDNA5 AT A GLANCE

SECTORS WITH THE LARGEST DAMAGE

74% of total damage incurred in 4 sectors

61.1 US\$ billion
in housing

14% of total housing
stock damaged
or destroyed



24.8 US\$ billion
in energy

Electricity disruptions
lasting up to 10-18 hours
per day



40.3 US\$ billion
in transport

90% of new
damage to
transport
sector was
incurred in
railways



19.2 US\$ billion in
commerce
& Industry

1 in 4 large
enterprises
directly
affected



Damage & Losses

(FEB 2022 – DEC 2025)

Impacts on people, infrastructure
and the economy continue to be
profound and far-reaching



195.1 US\$ billion
direct damage
up 11% since RDNA4



666.7 US\$ billion
socio-economic losses
up 13% since RDNA4

HEAVY HUMAN TOLL



21% lower than
in 2021.

15K Civilians have
been killed

11M People displaced
6M outside of Ukraine

2.4M Fewer children in Ukraine
compared to January 2022



71% Internally displaced people
rely on cash assistance

GROWING NEEDS

64.1 US\$ billion
increase in needs

Including from public and
private resources



40%
of needs

Could be met by the
private sector if reforms
are implemented

15.25 US\$ billion
Priority financing
needs for 2026

Including oth public
investment projects and
non-investment programs

At least
20.3 US\$ billion of
total needs
have been met



equivalent to 3.5%

Reconstruction & Recovery needs

(2026-2035)

Meeting needs requires both
public and private resources
over the next decade.

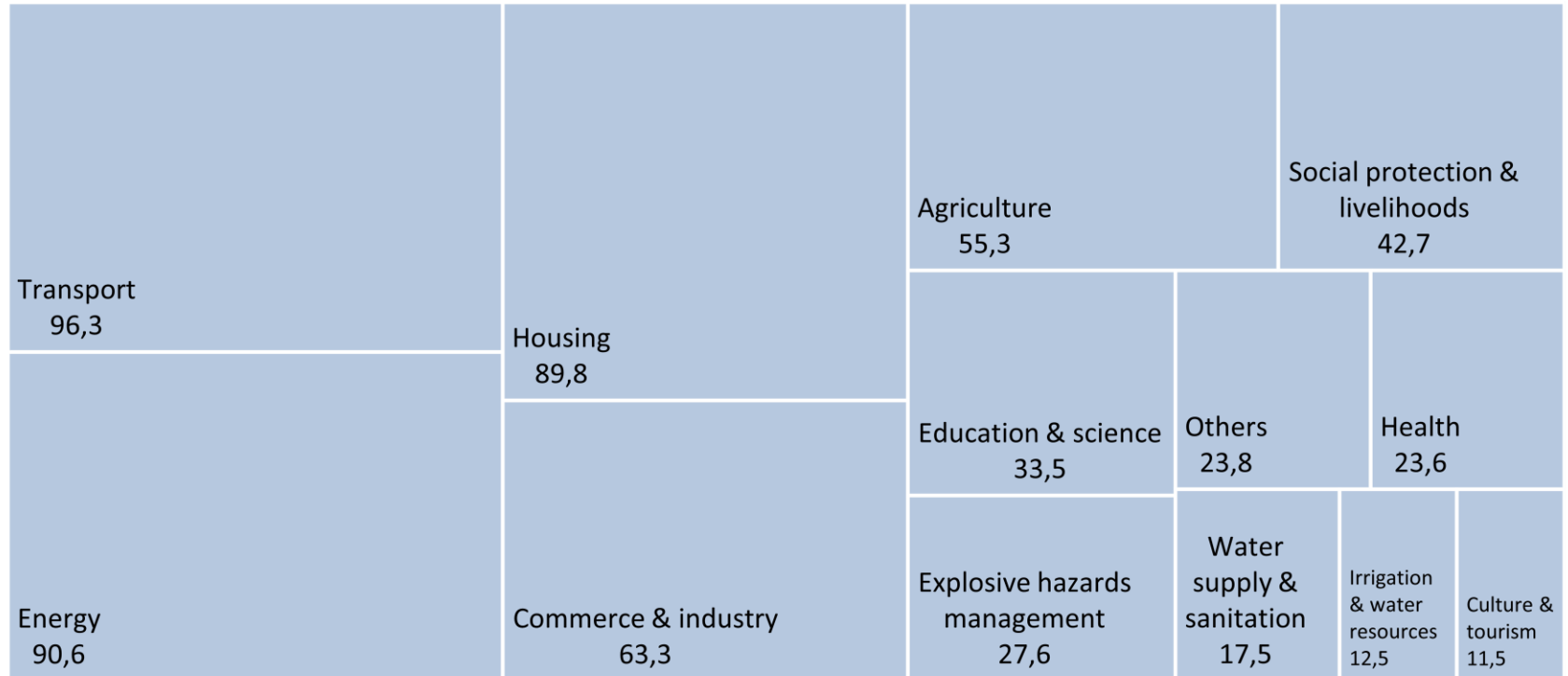
587.7 US\$ billion
reconstruction
and recovery
needs



up 12% since RDNA4

Reconstruction Needs in Detail

USD 588 Mrd., USD 195 Mrd. of which are direct damages



Source: World Bank; as of 02/2026

Cluster-Approach: Structured, Targeted Coordination



Energy



Construction



Infrastructure / Mobility



Agriculture & Forestry



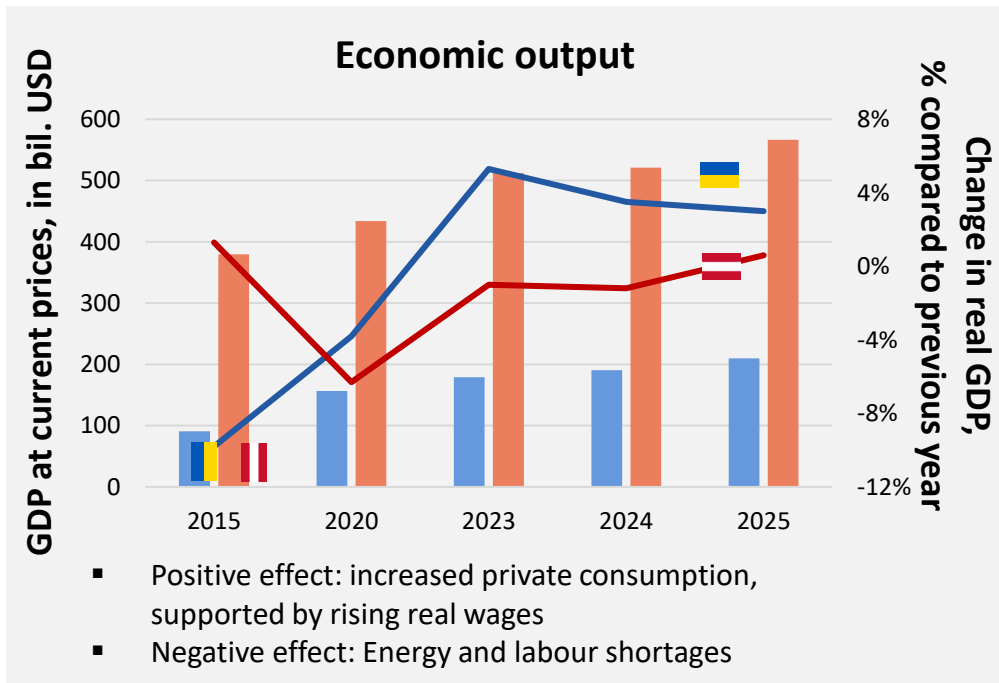
Financial institutions & insurance



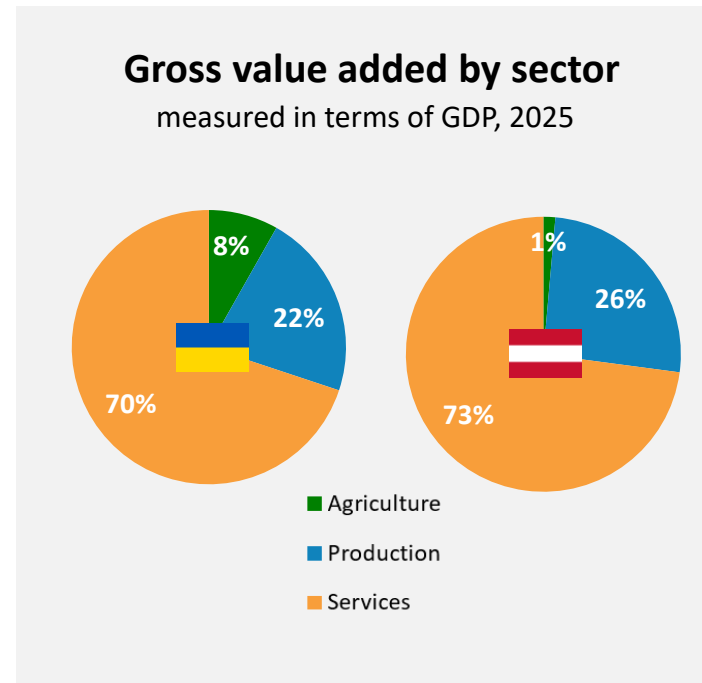
Health

- Utility and Energy Providers
- Renewable Energy, Hydrogen & Cleantech
- Biomass, Heating and Energy Systems
- Industrial and Engineering
- Research, Networks and Policy

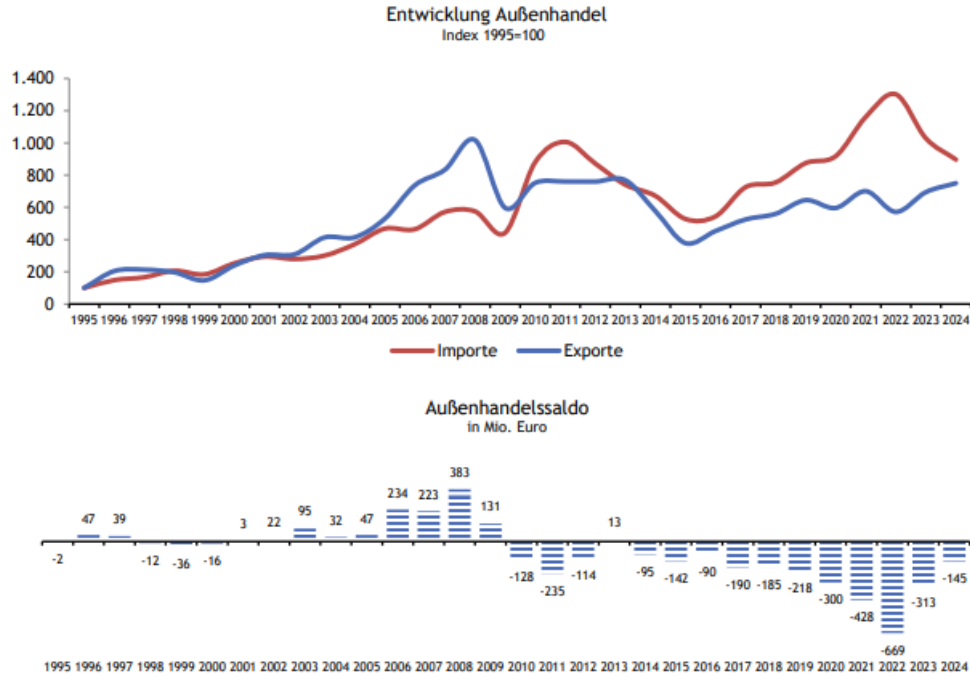
Economic Development in Comparison



Source: WKÖ, ÖNB



Foreign Trade



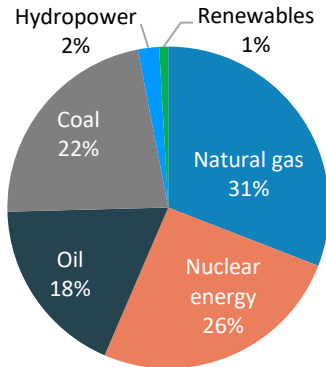
- **Ukraine's trade deficit is predicted to have increased by 52.6%** in 2025, particularly due to the **rise in imports of machinery, equipment and fuel.**
- Most important trading partners: Poland (10.5% of exports/16.2% of imports), China (6.7%/17.8%)
- Austria's exports to Ukraine increased by 16.4% in the first 11 months of 2025. AT will have a positive trade balance with Ukraine for the first time since 2012.

Source: Centre for Economic Strategy, WKÖ, State Customs Service of Ukraine

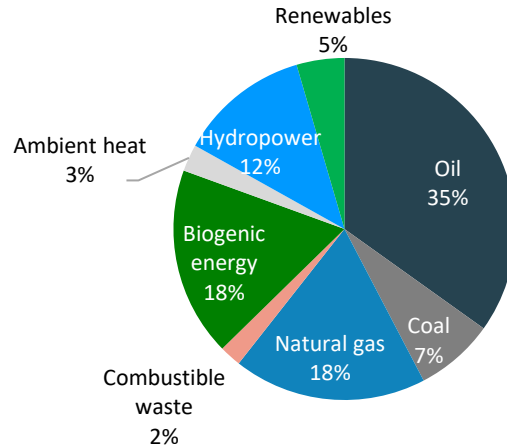
Energy Market in Ukraine

- **Total demand in 2023: 638 TWh** (compared to 317 TWh in Austria)
- UA production capacity in 2023: 459 TWh – around **one third** has to be **imported**
- Forecast **potential** of 219 GW from **wind and solar energy** during reconstruction

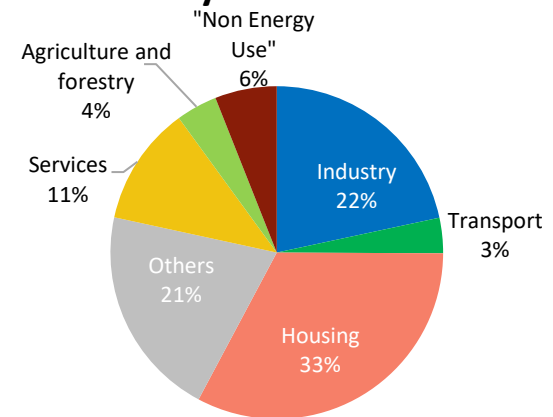
UA energy mix



AT energy mix



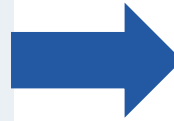
UA energy use by sector



Source: Statista, IEA, BMWET (2024)

Attacks on Energy Infrastructure offer Potential for the Expansion of New Energy Sources

- **Nuclear energy** as a mainstay of electricity supply
- UA **net importer** of electricity from EU countries since the start of the war due to the loss of domestic production



- Opportunity for expanding **renewable energy sources**
- Required investments in energy infrastructure: **USD 375 bil. by 2050**

Damage and Losses in Ukraine's Energy Sector

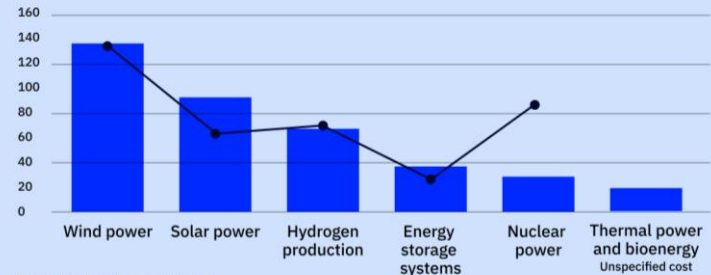


* Data as of 16/08/2025

Source: Itera, Ministry of Energy Ukraine

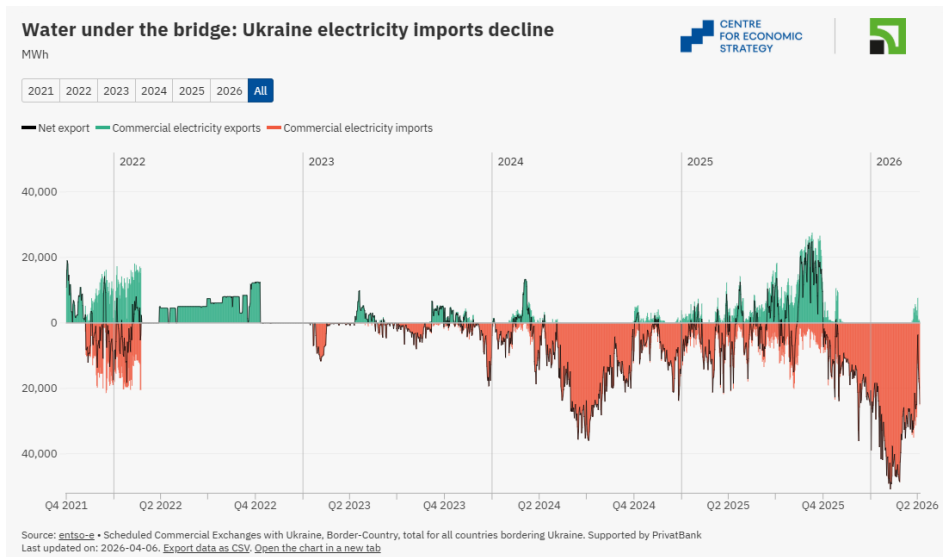
Potential of new capacities and required investments

Ukraine, by 2050



Source: Ministry of Energy of Ukraine

Ukraine's High Energy Demand



Demand until 2030

- Requirement for **new electricity capacity of 10.5 to 14.6 GW**
- Needs can be covered by solar and wind farms, decentralized power generation plants, energy storage systems
→ **Investments amounting to EUR 13.6–18.8 bil.**
- Wind power capacity: 5 GW
- Solar power capacity: 3 GW

Source: AHK

Priorities in the Ukrainian Energy Sector

Recent attacks on Ukrainian energy infrastructure

2026 (01/01-09/02)

- 454 facilities attacked
 - 154 direct strikes
- 2.000 drones
- 1.200 guided aerial bombs
- 116 missiles

2025

- 49,500 drones
- 1,800 missiles

Pillar I: Protection and Resilience

- Active: air defense & electronic warfare
- Passive: advanced solutions for facilities safeguarding

Pillar II: Supply and continuity

- Electricity imports from EU for system balancing
- Restoration of transmission networks

Pillar III: Decentralisation and Modernisation

- Distributed gas generation (turbines/piston engines)
- Development of renewables and biomethane market

Ukrainian Energy Resilience Plan

- Adopted on 3rd March 2026
- **Goal:** building a new decentralised and flexible system in coming months in preparations for the next winters
- **Total Costs:** EUR 5.4 bil.
- Implementation in **4 Pillars**



Protection of Energy Infrastructure

- **Needs:** 3,100 critical energy infrastructure facilities (15 MW)
- **Financing needs:** EUR 1.77 bil. (732 mil. for private companies)



Water Supply

- **Financing needs:** EUR 225 mil.



Energy Production

- **Additional Production:** 4 MW
- **Financing needs:** EUR 515 mil.
- **Needs:** regulatory simplification and speeding up of repairs.



Heat Production

- **Additional Production:** 5 MW (+34,7%)
- **Financing needs:** EUR 807 mil.

Humanitarian Aid – Key Areas

- Total of **EUR 351 mil.** in bilateral and humanitarian aid
- Thereof **EUR 114.46 mil.** from **AKF** (incl. via IKRK, UNHCR, UNICEF, NGOs, Nachbar in Not)
- **Grain from Ukraine:** Initiative to support Ukraine and prevent famine, especially in Africa – Austrian support: **EUR 10.6 mil.** to date



AT Energy Aid Deliveries

Since 2022 (estimates, non-exhaustive):

- 44 Transformers
- 133 Generators
- 25 000 litres of Diesel
- 750 heat pumps, 10 heat guns
- Other infrastructure components



Shelter



Winter relief



Medical care



Water supply

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