WEI IER

UKRAINIAN PATH TO EUROPEAN UNION. THE POLISH EXPERIENCE

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REPORT

UKRAINIAN PATH TO THE EUROPEAN UNION. POLISH EXPERIENCE

TRANSPORT SECTOR

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Introduction

A full-scale Russian invasion in February 2022 accelerated Ukraine's efforts to join the European Union. The Association Agreement, which came into force in 2014, except for the Deep and Comprehensive Free Trade Area (DCFTA) enacted in 2016, formed the basis of Ukraine's preparations to join the EU. In June 2022, Ukraine was granted candidate status. In December 2023, EU leaders decided to start accession negotiations. Given Ukraine's intention to join the European Union, we would like to consider the experience of Poland and Polish entrepreneurs in practically implementing this membership. European Union regulations for new members are both a challenge and an opportunity. We believe that Poland's experience will be of great value to Ukraine due to the two countries' historical, social, and cultural proximity. The potential of the Polish economy, the Polish experience from the economic transition, and the construction of modern communications, energy, and logistics infrastructure are undoubtedly additional assets, also in the context of support for the implementation of EU regulations in Ukraine. Another issue is assessing Ukraine's ongoing economic integration with the Polish and EU market and the expected post-accession effects for both countries. Opportunities and challenges for cooperation and competition will be discussed, preparing partners for much closer economic ties soon.

This report was prepared as part of the project "Ukrainian Path to European Union. Polish experience.", carried out jointly by the Warsaw Enterprise Institute (Poland) and the Institute for Economic Research and Policy Consulting (Ukraine).

A key element of the project is expert seminars and sectoral reports. We want to focus on sensitive sectors of the economy that, on the one hand, may pose significant challenges as potential areas of competition and disputes between Polish and Ukrainian entrepreneurs, and, on the other hand, discuss those areas that can become a place of cooperation and mutual complementarity between the economies:

- energy;
- food and agriculture;
- road transportation;
- pharmacy;
- construction and building materials;
- timber and furniture industry.

Each sectoral report consists of two parts. The first deals with the Polish perspective on a respective sector of the economy, the impact of European regulations on transforming the sector, and recommendations for the Ukrainian side. The second part deals with the current state of the sector in Ukraine, the challenges posed by European integration, and prospects for cooperation between companies from both countries.

We strongly believe that our reports and the project as a whole will be an important voice in the discourse on Ukrainian integration into the European Union, provide the right knowledge, and help overcome mutual conflicts and misunderstandings. We want to convince everyone that entrepreneurs of both countries can and should work together to build the economic strength of our countries based on economic freedom and liberty.

Executive Summary

This report on automobile freight and Polish-Ukrainian cooperation examines the current state, challenges, and opportunities in both countries' road transport sectors.

Poland's road transport sector is dominated by private ownership, with over 45,000 enterprises engaged in international transport. Poland has a dominant position in the EU market with a substantial fleet of approximately 305,000 vehicles with a gross vehicle mass of over 3.5 tons, the second-highest ratio per capita of such trucks in Europe. The sector benefits from competitive advantages such as lower service costs, flexibility in transport requirements, and a high availability of subcontractors.

Ukraine's motor transportation sector, with a road network exceeding 200,000 kilometers, is critical to the economy. In 2021, 41% of cargo by weight and 20% by volume were transported by road, emphasizing the importance of this mode for short-distance deliveries and high-value imports from the EU. The Russian invasion has severely impacted Ukrainian infrastructure, with extensive damage to roads and bridges. However, swift emergency repairs have demonstrated resilience.

The Polish road transport sector operates under a comprehensive legal framework aligned with EU regulations, including regulations on transport operators, driver qualifications, and enforcement mechanisms. Key regulations include Regulation (EC) No 1071/2009, Regulation (EC) No 1072/2009, and Regulation (EC) No 1073/2009, which establish the rules for access to the transport market and operational standards.

Ukraine's legal framework for road transport is grounded in the Law on Road Transport, with the Ministry of Infrastructure and Road Transport Safety Agency (Ukrtransbezpeka) playing crucial roles in regulation and enforcement. The country aligns its legislation with EU standards, focusing on digital licensing, safety compliance, and professional competency certification.

Polish road transport companies have effectively leveraged EU market freedoms, achieving significant growth and dominance in the European market. While creating barriers, the Mobility Package 1 regulations have also spurred Polish companies to maintain high quality and environmental compliance standards.

Polish companies face challenges related to market access inequality and enhanced competition from Ukrainian carriers. Sustained cooperation and trust-building are needed to optimize bilateral relations and reduce potential disputes. Ukraine faces challenges in fully complying with EU standards, particularly regarding vehicle emissions, customs procedures, and road infrastructure modernization. Enhancing border infrastructure, regulatory harmonization, and professional competency are critical areas for improvement.

Both countries should prioritize investments in cross-border infrastructure, including new border points, logistics centers, and digital systems for seamless data sharing. Strengthening professional competency through joint training programs and certification processes will ensure compliance with EU standards. Continued dialogue and cooperation between Poland and Ukraine are essential for resolving border issues, promoting fair competition, and achieving mutual economic benefits.

Ukraine should focus on rebuilding and modernizing its transport infrastructure, emphasizing integrating with EU transport networks. Implementing digital systems for licensing and customs clearance will enhance efficiency and transparency. Aligning regulatory frameworks with EU standards will facilitate smoother cross-border trade and strengthen Ukraine's position in the European market.

This joint report underscores the importance of strategic alignment, sustained investment, and collaborative efforts in strengthening the transport sectors of Poland and Ukraine, ensuring resilience, competitiveness, and mutual economic growth.

1. Characteristics of the road transportation sector in Poland

Polish road transport is a branch of the economy based 100% on private ownership. There are 45.5 thousand enterprises authorized to carry out international transport and about 70 thousand entrepreneurs carrying out domestic transport. The fleet of transport means at the disposal of Polish road carriers consists of about 305 thousand vehicles with a GVM of over 3.5 tons, mainly over 12 tons, and 36 thousand vehicles with a GVM of 2.5 - 3.5 tons performing international road transport based on a Community license, 18.5 thousand vehicles performing international transport for own use in about 6.6 thousand companies of various sectors of the economy (food industry, trade, construction, etc.).

Table 1. The quantitative structure and breakdown

Carriage of goods EU			Carriage of people (coach)	
Licenses	Extracts*	Extracts 2,5–3,5 t.	Licenses	Extracts
45 565	304 943	36 120	2 793	11 487

* Extract – license excerpt in the number appropriate to the reported under the license to carry out transportation of vehicles.

legally valid as of December 31, 2023.

Table 2. Own-use transport

Types of certificates	Certificates	Extracts
Carriage of goods	6633	18 711

legally valid as of December 31, 2023.

Freight shipments are carried out through various types of logistics services. Warehousing and general cargo services have grown the fastest in recent years. This is according to a quantitative survey of 100 transportation managers conducted by TLP and SpotData. An order for road transportation can be part of a broader operation to provide logistics services. Such services can be divided in various ways. The example below also used in the report "Road transport in Poland 2021+":

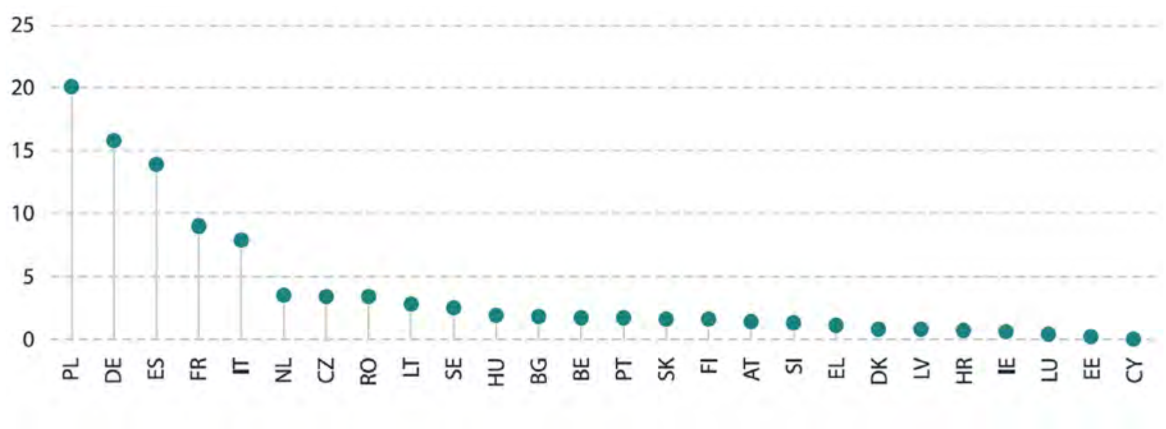
1. bulk cargo transport services,
2. full truckload transport services,
3. general cargo transport services,
4. special transport services (involving forwarding and transportation of goods requiring special, non-standard conditions of carriage),
5. warehousing services,
6. contract logistics services,
7. courier services (KEP - carriage and distribution of parcels weighing up to 50 kg).

Polish road transport utilizes its advantages:

- relatively low price of the service,
- the ability to transport goods of special importance and special transport requirements,
- high flexibility in terms of timeliness,
- high availability of subcontractors,
- flexible offer of general cargo transportation.

Poland has the second-highest truck ratio in Europe, with a GVM over 3.5 tons per capita, above 30 vehicles. In 2022, Poland had 738.6 thousand trucks in total. Eurostat's annual report, "Key figures on European transport, 2023 edition," confirms the dominant position of Polish carriers in the European Union.

Graph 1. Share of Road Freight Transport in the EU by Country of Vehicle Registration in 2022 (% based on ton-kilometers)



Source: Eurostat

Eurostat calculated that in 2022, among the 6.1 million people employed in transportation in the European Union, Poland accounted for 12%. A total of 747,000 people were employed in the sector in Poland. France has the largest group of people employed in this sector, with 852 thousand people. The share of employment above 10% among European transporters was held only by Germany (11.6%), Spain (11.1%) and Italy (10.6%). It is further confirmed that road transport is the dominant industry, employing as much as 89.6% of the indicated 6.1 million workers. The remaining share includes rail, air, and inland waterway transport.

Eurostat's compilations show that Polish companies are geared more toward international than domestic transportation. This differentiates Poland from the EU as a whole; as much as 68% went to domestic transportation. Countries with a higher percentage of international activity than Poland were Lithuania, Luxembourg, Slovenia, Romania, and Bulgaria. However, they are mostly small countries, which may explain the high percentage.

Polish road transport entrepreneurs are the EU's largest fleet and perform up to about 30% of transport work in the entire EU, depending on the year. With some European countries it is up to 90% of bilateral transport and sometimes up to 30% of domestic transport carried out as cabotage.

2. Characteristics of the road transportation sector in Ukraine

Ukraine is a big country with a large multimodal transport infrastructure that includes a network of roads, railways, airports, seaports, and pipelines. Transportation plays a crucial role in the functioning of the export-oriented economy.

The ongoing Russian invasion has significantly impacted Ukraine's transportation system. By December 2023, total infrastructure damages reached approximately USD 33.6 bn, including destruction of 25,000 km of roads and 344 bridges.

Ukraine's motor transportation sector is critical to the nation's economy and logistics network. With a road network exceeding 200,000 kilometers, it facilitates the transportation of cargo and passengers across the country and to neighboring nations. Despite its crucial role, several challenges persist, including infrastructural degradation, the impacts of the war, and the need for modernization.

In 2021, about 41% of cargo (by weight) and 20% (by volume) were transported by road, primarily involving short-distance deliveries. Trucks are frequently used for "last-mile" transportation of heavy freight and agricultural products, as well as for importing high-value goods from the EU. However, Ukraine's road density is significantly lower than that of European counterparts, and maintenance is lacking. A 2016 assessment found only 46% of the core network (20,760 km of international, national, and regional roads) is in good condition. The remaining roads were either in fair or poor condition. Rehabilitation programs launched since 2018 (Road Fund and the State Road Rehabilitation Program) have slowed deterioration, but further investments are required to achieve optimal conditions.

Ukraine's transport infrastructure quality lags behind most European nations, as highlighted by the World Bank's logistics performance index. One issue has been the poor state and low capacity of border checkpoints. A lack of maintenance funding has affected both safety and efficiency. The popularity of private cars has resulted in urban road congestion, parking shortages, pollution, and high-stress levels among commuters. Traffic incidents are also prevalent, with pedestrian fatalities at exceptionally high rates.

The ongoing Russian invasion has significantly impacted Ukraine's transportation system. By December 2023, total infrastructure damages reached approximately USD 33.6 bn, including destruction of 25,000 km of roads and 344 bridges. The war has particularly affected regions that were occupied by Russia or that have experienced protracted positional fighting like Donetsk, Kherson, Luhansk, and Zaporizhzhia, which together account for over 70% of damage[1]. The largest losses come from disrupted access to Black Sea ports (65% of total losses in transportation), while road transport accounts for 7% of the damages. Despite these challenges, the Ukrainian transport sector has shown resilience by quickly repairing roads and bridges in recovered territories in Kharkiv, Chernihiv, Kyiv, and Sumy regions.

[1] https://ukraine.un.org/sites/default/files/2024-02/UA%20RDNA3%20report%20EN.pdf.

Emergency repairs were quickly executed across more than 2,000 kilometers of roadways, including motorways and highways, to ensure connectivity and maintain logistical routes crucial for the country's economy. Bridge restoration was also prioritized, with around 115 road bridges rebuilt using temporary structures, including 29 modular bridges donated by international partners. This swift deployment of temporary bridges played a crucial role in reconnecting essential transport routes.

Overall, the resilience and efficiency of Ukraine's transportation sector are evident through its ability to prioritize urgent repairs while coordinating international support, ultimately ensuring that key logistical routes are functional and accessible.

In 2023, Ukrainian carriers performed 362 thousand trips to Poland, of which 68 thousand were fuel transportation and about 15 thousand were humanitarian goods. Commercial shipments to Poland in 2023 amounted to 280 thousand trips compared to 307 thousand in 2022 and 229 thousand in 2021. Accordingly, Polish carriers performed more than 132 thousand trips to Ukraine in 2023. The share of Polish carriers in the transportation market between Ukraine and Poland fell from 40% in 2021 to 33% in 2023 due to Russian armed aggression and the blocking of traditional trade routes.

Graph 2. Number of trucks crossing Polish-Ukrainian border

Source: eQueue Ukrainian service; created with Datawrapper

The motor transportation sector remains vital for Ukraine's economy and logistical stability, with road transport carrying a significant portion of cargo and enabling international trade. Ongoing efforts to rebuild and modernize infrastructure after wartime damages are essential, and private logistics companies continue to be pivotal in ensuring uninterrupted supply chain flows. The sector requires sustained investment and modernization to overcome challenges and adapt to changing economic demands.

3. The Legal and Organizational Basis of the Sector in European law

Polish road transport operates within the legal framework of the EU:

- Regulation (EC) No 1071/2009 of the European Parliament and of the Council of 21 October 2009 establishing common rules concerning the conditions to be complied with to pursue the occupation of road transport operator and repealing Council Directive 96/26/EC
- Regulation (EC) No 1072/2009 of the European Parliament and of the Council of 21 October 2009 on common rules for access to the international road haulage market
- Regulation (EC) No 1073/2009 of the European Parliament and of the Council of 21 October 2009 on common rules for access to the international market for coach and bus services, and amending Regulation (EC) No 561/2006
- Regulation (EU) 2020/1055 of the European Parliament and of the Council of 15 July 2020 amending Regulations (EC) No 1071/2009, (EC) No 1072/2009 and (EU) No 1

The aforementioned regulations define the EU legal framework for access to the profession of road transport operator, the practice of the profession of driver and the general rules for the performance of transport. These rules are detailed in more than a dozen regulations and directives. All of these regulations define the rules of transport activity in the European Union in a detailed and absolute manner. The regulations cover issues such as:

- definition of the conditions for undertaking transport activities through the rules for the performance of transport,
- the conditions and rules for the work of drivers,
- the provisions establishing the rules for the enforcement and sanctioning of persons and companies.

Implementing or supplementary in relation to the EU law, there are several laws and dozens of regulations in Poland, including:

1. Road Transport Law - Law of September 6, 2001, uniform text Dz.U. of 2024, item 728.
2. Law of November 15, 1984, Transportation Law consolidated text OJ of 2020, item 8 and amendments OJ of 2023, item 1720.
3. Law on drivers' working time - the law of April 16, 2004, uniform text Dz. U. of 2024, item 220.
4. Law on Delegation of Drivers in Road Transport - Law of July 28, 2023. Journal of Laws of 2023 item 1523.
5. Law on digital tachographs - the law of July 5, 2018, consolidated text Dz.U. of 2023 item 324, as amended item 1523.

Each member state, regardless of the alignment of its legal system with EU law, must build an organizational system for handling carriers applying for authorizations, a system of supervision and control of authorizations, and compliance with the requirements for holding authorizations throughout the holding period.

The key document providing authorization to carry out transport services in the EU as an EU carrier is the possession of a Community License. In Poland, it is issued by administrative decision by the Chief Inspector of Road Transport. The issuance of a license under EU law must be preceded by obtaining a permit to practice the occupation of road transport operator from the Chief Road Transport Inspectorate.

In Poland, there is a two-track legal system. Entrepreneurs who plan to carry out only domestic transport can obtain a permit to carry out the profession of a carrier, as required by EU law, from a local authority (Starosta). Such a permit entitles them to carry out exclusively domestic transport, but it is worth noting that it also entitles them to apply for a community license in the same way as a permit issued by the Chief Road Transport Inspector.

The EU requires a member state to organize supervision and control of road transport. In Poland, a special control service has been established (different solutions exist in different EU countries) – the Road Transport Inspection. The control function is carried out by the Chief Road Transport Inspectorate (ITD), which was established to control compliance with the regulations in force for the performance of road transport and non-commercial transportation of persons and goods, operates and the Provincial Road Transport Inspectorates. The establishment of the ITD did not take away the powers to control transportation from the Police, which has analogous powers to control transportation in Poland. Inspections are carried out at companies to check organizational compliance and documents at the company and on the road during actual transports. The inspections are primarily aimed at reducing negative events in road transport.

The key role in the implementation of transport and its organization is played by the Transport Manager. EU regulations allow that this may be both the owner and a member of the decision-making body of the economic entity, but also a salaried employee. This person is appointed by the carrier under a contract (a contract of employment or a civil contract) performing certain tasks in the interests of the entrepreneur. A transport manager is required to have a certificate of professional competence - this is an authorization granted by a state-authorized entity or a scientific body.

In the organization of transportation, drivers and their role in the transportation system are, of course, key. In order for a driver to be able to carry out transports, it is not enough for him to have a qualification in the form of a driver's license of a certain category. EU law requires the implementation of a driver's admission system and periodic training to renew and improve professional qualifications. A driver, in order to be employed, is obliged to complete "initial qualification" training, pass an exam before an authorized organizational unit (in Poland these are Voivodeship Traffic Centers (WORDs)) and obtain opinions of a doctor and psychologist

In the organization of transportation, drivers and their role in the transportation system are, of course, key. EU law requires the implementation of a driver's admission system and periodic training to renew and improve professional qualifications.

authorized to examine drivers. On the basis of documents confirming the fulfilment of the above requirements, a code "95" is placed in the driver's license, authorizing him to practice as a driver. The code is time-limited and must be renewed every 5 years by undergoing periodic training and a new medical and psychological examination.

It is worth pointing out that European regulations create a uniform standard of enforcement, a catalog of violations is established, which should in all member countries result in the initiation of a good reputation examination procedure, which may end in the suspension or revocation of authorizations.

The details of this uniform classification are defined in:

- Commission Regulation (EU) 2016/403 of 18 March 2016 supplementing Regulation (EC) No 1071/2009 of the European Parliament and of the Council with regard to the classification of serious infringements of the Union rules, which may lead to the loss of good repute by the road transport operator and amending Annex III to Directive 2006/22/EC of the European Parliament and of the Council.

EU regulations require detailed records to be kept of the entrepreneurs, the authorizations issued to carry out transport, and the personnel authorizations of those responsible for organizing and carrying out transport. Commission Implementing Regulation (EU) 2016/480 of 1 April 2016 establishing common rules concerning the interconnection of national electronic registers on road transport undertakings and repealing Regulation (EU) No 1213/2010 forms the legal basis for the creation of a register in Poland is the National Electronic Register of Road Transport Entrepreneurs; https://kreptd.gitd.gov.pl. The Register has a public part accessible via the Internet allowing to check and confirm the actual existence of companies and their authorizations.

4. The impact of European regulation and practice on the road transport sector in Poland

The rules for taking up and carrying out business activities in the field of road transport are regulated in detail by EU regulations. In 2020, at the request of the European Commission, justifying the need for changes in accordance with the socio-economic development of Europe and technical progress in motorization, a set of regulations known as the "Mobility Package 1 was adopted, contained, inter alia, in:

- Regulation (EU) 2020/1055 of the European Parliament and of the Council of 15 July 2020 amending Regulations (EC) No 1071/2009, (EC) No 1072/2009 and (EU) No 1024/2012 with a view to adapting them to developments in the road transport sector.

Negotiations on this set of regulations lasted more than two years. Initiated in the spirit of adapting the regulations and conditions for carrying out transport to the changing situation, they were actually concerned with securing the national interests of some "old" EU countries. Unfortunately,

Entrepreneurs took advantage of economic conditions, in particular cost differences, which favored the development of Polish companies and their operability throughout the EU market. Such practice allows them to maintain a leading position in the EU freight market.

the regulations create real barriers to access to the markets of individual countries, limit the right to operate in those markets, and force further investments in transport companies, including, among others, the replacement of digital tachographs with the next new generation. Without questioning the need for good monitoring of drivers' working time and the safety of road traffic and carriage, further costs imposed on entrepreneurs worsen the competitiveness of the transport offer in the EU and European transport market.

European Union law describes in great detail the rules for undertaking and performing road transport. Analyzing only the expansion of Polish transport companies into the European market after accession regardless of the very strict laws in force (high requirements for market access), it should be pointed out that the market game and EU freedoms were used in an excellent way. Entrepreneurs took advantage of economic conditions, in particular cost differences, which favored the development of Polish companies and their operability throughout the EU market. Of course, it was not only the costs that determined the good transport offer, Polish carriers in their operations on the European market primarily focused on quality, on-time deliveries and modern and environmentally friendly means of transport. Such practice allows them to maintain a leading position in the EU freight market.

Analyzing Polish-Ukrainian relations in road transport, it should be stated that the inequality that exists in access to the EU market for carriers results in a bad practice in bilateral relations producing a large area of unfair competition and suspicions of unfair practices using the wide-open legal norms of the European Union agreement. In the opinion of Polish companies, the European market has not been as wide open as Ukrainian carriers are trying to interpret and exploit. In particular, a part of the market is still covered only by bilateral regulation:

- cabotage transports
- transports to and from third countries.

Opening the EU market contractually does not make Ukrainian carriers EU carriers. The practice in the operation of these companies goes beyond the contractual framework. It is worth considering whether Ukrainian companies in the run-up to accession and in the first years of membership will take advantage of their opportunity and potential in the EU market. In order to make even a preliminary assessment of this kind, it should be pointed out that the opening of the EU market will promote the development of these companies, but at the same time the Ukrainian market must be permanently opened. Currently, limited access to this market caused not only by the war causes great inequality and problems with maintaining fair competition. It is worth remembering that the Union is not only about rights, but also about obligations. Inspection services assess behavior and compliance with regulations. Whilst European law enforcers transparency in sanctioning negative behavior and enforcement of negative behavior also in the country of the company's headquarters.

5. Legal and organizational basis of the motor transportation sector in Ukraine

The legal and organizational basis of Ukraine's motor transportation sector is grounded in the Law of Ukraine on Road Transport, which outlines the specific responsibilities and distribution of power among governmental bodies[2]. Article 6 of this law assigns the primary regulatory authority over the transportation sector to the Ministry of Infrastructure. This ministry plays a crucial role in formulating strategic policies, determining priority areas for motor transport development, and enacting mandatory regulations that carriers and other stakeholders must adhere to.

Under this legislative framework, the Ministry of Infrastructure ensures that the overall direction of Ukraine's transport policies aligns with national interests, economic goals, and international obligations. It oversees the adoption and implementation of regulations concerning safety standards, environmental compliance, and operational efficiency. This regulatory supervision is crucial to maintaining the quality and reliability of road transportation services.

Complementing the Ministry of Infrastructure, the State Service for Transport Safety (known as Ukrtransbezpeka) handles most state control functions over motor transport. It serves as the primary enforcement body to ensure that carriers and other stakeholders comply with the law. The service is also responsible for conducting dimensional and weight controls on roads and issuing relevant licenses and permits, particularly for the transportation of dangerous goods and international freight. Domestic transportation of ordinary cargo remains exempt from licensing requirements.

In addition to issuing licenses, Ukrtransbezpeka investigates technical accidents and disasters in road transport, maintaining a detailed database of incidents to analyze their causes. This data analysis helps develop and propose preventive measures to reduce the recurrence of accidents. Furthermore, the agency checks vehicle conditions, monitors cargo documents, and ensures that working-hour regulations for drivers are followed. Its oversight extends to compliance with both national laws and international agreements, reflecting the integrated nature of Ukraine's road transportation sector.

> ***State policy for road transportation is ultimately determined by the Cabinet of Ministers. In 2018, the government |introduced the National Transport Strategy of Ukraine, a comprehensive plan aimed at modernizing the transportation sector up to 2030. This strategy seeks to shift some freight transportation from road to rail and water, an approach intended to alleviate the pressure on the road network while promoting sustainability.***

The State Customs Service complements Ukrtransbezpeka's work by overseeing cargo inspection at border checkpoints. They ensure that the vehicles, cargo documents, and drivers comply with Ukraine's regulations and standards, facilitating the legal and efficient flow of international road traffic. State policy for road transportation is ultimately determined by the Cabinet of Ministers. In 2018, the government introduced the National Transport Strategy of Ukraine,

2 Law 2344-III of April 5, 2001 https://zakon.rada.gov.ua/go/2344-14.

a comprehensive plan aimed at modernizing the transportation sector up to 2030. This strategy seeks to shift some freight transportation from road to rail and water, an approach intended to alleviate the pressure on the road network while promoting sustainability. It also strengthens weight control measures to prevent infrastructure degradation due to overloading.

The strategy incorporates a new licensing approach based on EU standards, emphasizing business reputation, financial solvency, and the professional competence of personnel. These reforms are designed to raise the quality and competitiveness of the sector. Developing a robust and extensive road network, including increasing the share of paved roads, is also an essential component of the strategy, underscoring the commitment to infrastructural improvements.

Through this framework, the Ukrainian government aims to achieve a more efficient, safe, and environmentally friendly road transport system that aligns with international best practices and standards.

6. Impact of European regulation and practice on the motor transportation sector in Ukraine

The motor transportation sector of Ukraine has been significantly impacted by EU regulation and practice as the country aligns its legislation and operations with EU standards. This alignment is evident across multiple facets of the transportation industry, bringing improvements in digitalization, market access, safety, and environmental compliance.

One of the critical areas of progress is the digitization of licensing and registration processes, managed by the State Service for Transport Safety (Ukrtransbezpeka). The electronic system ensures greater transparency and efficiency, making it easier for carriers to secure the necessary permits and documentation. This digital approach also provides a more accurate data collection process, which enhances regulatory oversight. The government maintains a comprehensive carrier registry, offering a reliable database of licensed operators and vehicles, ensuring compliance with EU requirements.

Professional competency certification has also been strengthened through collaboration with industry associations that train and certify drivers and transport managers. These centers offer education that prepares them to meet EU professional standards, ensuring their qualification for handling international cargo operations. This training is in line with European regulations, enabling drivers to obtain competency certificates required for operating within the EU.

In terms of market access, Ukraine is working to align with EU Regulation 1071, which defines the standards for entry into the transport market. This regulation emphasizes the importance of good reputation, financial stability, and professional competence for transport operators. By adopting these principles, Ukrainian authorities are raising the bar for business practices in the transportation sector, promoting a culture of responsible and reliable operations.

Technical standards and safety compliance are another area where European directives have shaped Ukrainian transport policy. For example, the adoption of EU Directive 96/53/EC imposes strict limits on vehicle dimensions and weight, which helps prevent excessive road wear and promotes safety. By adhering to such regulations, Ukraine ensures that its transportation fleet remains competitive, efficient, and environmentally conscious.

Cross-border coordination is crucial to facilitating seamless movement of goods across Ukraine's borders. In particular, Ukraine and Poland have engaged in cooperative efforts to enhance border processes and reduce delays. Despite ongoing infrastructure challenges at key crossing points, this collaboration ensures smoother customs clearance and improved traffic flow, enabling a higher volume of international trade.

Overall, European regulations and practices have profoundly influenced the motor transportation sector of Ukraine. Through digital licensing, comprehensive data management, market access alignment, safety compliance, and international cooperation, Ukraine is gradually achieving a more integrated, efficient, and secure transportation network. These reforms not only align Ukraine with European standards but also bolster its economic resilience and ability to handle the increasing demands of international trade.

7. Challenges in aligning Ukraine's motor transport sector with EU standards

Ukraine's efforts to align its motor transport sector with EU standards reveal a complex landscape of challenges involving regulatory compliance, infrastructure limitations, and operational practices. Despite significant progress made over recent years, there remain several hurdles that Ukraine must address to fully integrate with European norms, particularly in light of the first annual enlargement report issued by the European Commission in November 2023.[3]

One of the challenges Ukraine faces is ensuring full compliance with EU rules on tachographs. Although partially implemented, their use needs to be more consistent across the transport sector. This challenge intersects with Ukraine's commitment to align its regulations on driver training, working hours, and safety with European standards. The EU's mobility package mandates specific driving and rest periods to improve safety, reduce fatigue, and ensure fair labor practices, which Ukraine is progressively integrating into its national framework. However, not all rules related to rest periods have been fully adopted, leaving gaps in regulatory implementation.

In addition, Ukraine's vehicle technical standards do not entirely meet the EU's rigorous requirements, particularly regarding emissions. Many Ukrainian vehicles fall short of Euro 6 standards, which could affect cross-border trade due to EU policies focused on reducing emissions. This situation necessitates a systematic upgrade of Ukraine's vehicle fleet, especially for carriers engaged in international transport. Transitioning to cleaner, more environmentally friendly vehicles will require investment and modernization, a challenge compounded by current economic constraints.

Customs procedures are another sticking point, particularly at the border with Poland, where long wait times often plague carriers. These delays stem from outdated procedures, inadequate staffing, and insufficient infrastructure, resulting in significant inefficiencies. Streamlining customs processes and harmonizing them with EU norms is critical, necessitating closer coordination between Ukrainian and Polish officials.

> ***Developing new border crossings and expanding existing ones, alongside logistical facilities at the border, will help reduce congestion and facilitate smoother transit***

The border infrastructure is similarly challenged. Current facilities are inadequate for the volume and type of cargo crossing between Ukraine and the EU, leading to delays that impede trade. Developing new border crossings and expanding existing ones, alongside logistical facilities at the border, will help reduce congestion and facilitate smoother transit. In June 2022, Ukraine and the EU signed the road transport agreement which liberalized bilateral and transit road transport between Ukraine and the European Union for an initial period of one year, subsequently extended to 2024. The agreement facilitates smoother cross-border transport by waiving the need for permits, but also demands strict adherence to EU norms for safety, working conditions,

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[3] https://neighbourhood-enlargement.ec.europa.eu/system/files/2023-11/SWD_2023_699%20Ukraine%20report.pdf.

and environmental compliance. Moreover, the agreement recognizes Ukrainian driving licenses and certificates of professional competence, eliminating barriers to employment for Ukrainian drivers within EU countries.

Digital systems and data-sharing practices, although advanced, still require improvements to reach EU standards. While Ukraine has digitized much of its licensing and registration processes, the systems must be more seamlessly integrated across transport and customs agencies. This requires secure, user-friendly platforms that provide accurate, real-time data, benefiting both government and private-sector stakeholders.

Although Ukraine has signed the Interbus Protocol, which pertains to international regular and special regular carriage of passengers by coach and bus, the country has yet to ratify it. This delay in ratification poses a significant challenge as it hinders the full implementation of the protocol's provisions. Ratifying the Interbus Protocol is essential for Ukraine to fully integrate into the European network of passenger transport, ensuring smoother and more regulated cross-border transportation of passengers. This integration is vital for achieving compliance with EU standards and facilitating easier, more reliable international travel by road. The ratification would signal a commitment to upholding the standards set for safety, operational efficiency, and mutual recognition of documentation within the transport sector.

Another challenge is the establishment of a professional development culture that aligns with EU standards. Ensuring that drivers and transport managers possess professional competency certificates and adhere to EU labor regulations is critical. Yet, balancing these requirements with the economic realities of Ukraine's lower-wage economy remains difficult, particularly in light of global supply chain disruptions and the increased demand for Ukrainian drivers. The EU’s Mobility Package and wage standards set specific rules for minimum wages and benefits, making it more difficult for Ukrainian carriers to compete without significantly increasing their costs. For carriers, compliance with EU wage standards while maintaining competitiveness is a balancing act that necessitates higher wages and improved working conditions.

Polish carriers have expressed concerns about potential wage discrepancies between the two nations, fearing that Ukrainian carriers could undercut them through lower labor costs. However, Ukrainian carriers must still meet EU wage standards to remain competitive.

Lastly, road safety remains a prominent challenge. Ukraine's road safety strategy up to 2024 was ambitious, but the full-scale invasion by Russia severely affected its implementation. Even before the invasion, Ukraine's road safety record was concerning. Infrastructure improvements, like safety barriers, better signage, and road markings, are necessary to reduce accidents. Additionally, enforcement of road safety regulations needs strengthening to reach European levels, particularly regarding education and penalties.

8. Experiences of Polish Companies Related to EU Accession and Membership Useful For Ukraine and Ukrainian Entrepreneurs

Poland's road to the European Union took more than 10 years, under conditions of internal peace and socio-economic consensus. In the field of road transport, Germany demonstrated great openness by opening its borders to Polish road carriers a few years before formal accession. Bilateral permits were abolished, and monitoring of freight volumes and cyclical consultations were introduced in preparation for membership and full opening to the European market. With regard to Ukraine, Ukrainian carriers even before the formal opening of the path of negotiations for accession obtained very favorable conditions for performing transport in the EU. The agreement between Ukraine and the EU opened up the European market to a large extent, allowing bilateral and transit carriage to EU countries without permits. It should be noted that free cabotage[4], which requires obtaining appropriate permits from the competent authorities of EU member states, is still prohibited. In the case of Poland, the competent authority to issue such a permit is the Minister of Infrastructure as the minister responsible for road transport. Ukrainian carriers are also not allowed to carry out "cross trade" (large cabotage within the EU). In these realities of the partial opening of the EU transport market, Ukraine should take advantage of the opportunity it has received to properly prepare for full membership in the area of road transport. Partial freedom of carriage by Ukrainian carriers induces some operators not to comply with EU law and Polish regulations on market access.

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Polish carriers and organizations of Polish road carriers are increasingly articulating their objections, pointing to competitive inequality and violations of the rules of carriage by Ukrainian entrepreneurs. The most common objections are violations of the ban on cabotage and "cross trade" carriage, additionally at dumping prices that are unacceptably low, according to Polish carriers and forwarders. Polish carriers expressed their dissatisfaction in the form of protests and blocking the Polish-Ukrainian border, while at the same time failing to restrict humanitarian and aid/supply shipments of a military nature. During the protest, the carriers further pointed to the biased actions of Ukrainian inspection services, which held hundreds of Polish empty trucks in multi-day queues on the Ukrainian side. The protesters responded with a similar response by blocking Polish border crossings even more effectively. Bilateral talks yielded compromise arrangements after about four months, the protest was suspended, and the Ukrainian side pledged,

[4] Cabotage – the performance of transport inside an EU country by carriers from another EU country.

among other things, to clear border crossings and reduce the use of electronic queues waiting to cross the border. Unfortunately, the arrangements did not yield the expected results, as after the road carriers suspended the protest, farmers' protests began in Europe, including active protests by Polish farmers in the form of blocking the border with Ukraine and inside the country against the green deal and the excessive influx of cheap agricultural products from Ukraine.

Ukrainian carriers in the run-up to accession should consider that many of the vehicles they owned already failed to meet environmental performance and safety conditions at the time they were purchased for the companies. The EURO 3, EURO 4 and subsequent standards up to EURO 6 were entering absolute application in Ukraine, most likely with a time lag of several years. In such cases, meeting the relevant environmental performance standard does not coincide with the date of first vehicle registration, as in EU countries. After entry into the EU, these vehicles may be challenged in terms of meeting environmental performance standards (cleanliness/composition of exhaust gases, noise), in particular in terms of determining rates for use of road infrastructure.

The Ukrainian side, in preparing for accession, should consider and fully respect the EU rules of carriage and access to the profession of a carrier at this stage. The most important thing for Ukrainian entrepreneurs and any country aspiring to EU membership is the rapid adaptation of national law to EU regulations. Countries preparing for accession should apply directly applicable regulations based on their national law. The regulations should be literally transposed into the Ukrainian legal order just like the law derived from directives. EU law, being a particular expression of the process of integration of the countries of European nations, is merging with national legal orders, becoming part of them. The process of merging EU law with the law of member states is complicated and is called implementation of EU law. In order for member states to enjoy the benefits of membership in the EU, they must implement EU law efficiently and effectively. Transposition of this law into Poland was not an easy process and took several years with a lot of activity by Polish legislative bodies. Implementation requires not only imagination and professionalism, but also a positive approach to the EU acquis in its entire subject matter and respect for the subjectivity of the recipients of this law. Proper preparation for active implementation requires careful analysis of the number and content of EU laws. In the area of road transport, EU regulations are more than twenty a regulations and dozens of directives. However, only in the area of vehicle approval there are several hundred legal acts on automotive technology. Taking advantage of EU freedoms requires preparation, so this way of binding Ukraine to EU laws will prepare entrepreneurs for a smooth and seamless entry into the EU market.

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In summary, the challenges Ukraine faces in aligning its motor transport sector with EU standards are multifaceted, requiring coordinated efforts across government, industry, and international partnerships. The sector must navigate a delicate balance between regulatory compliance, infrastructure modernization, and economic competitiveness while dealing with the lasting effects of the war and regional instability. Despite these challenges, Ukraine's commitment to closer integration with European norms remains strong, offering hope for a more harmonized and resilient transportation sector.

9. Prospects For Cooperation Between Polish And Ukrainian Companies In the Road Transport Sector In the European Market

Historically, cooperation between Polish and Ukrainian carriers has been very good. In the years when the market was fully regulated, the key to mutual relations was the quota of permits which administratively determined the volume of freight work. In regular passenger transportation, regulation was so far-reaching that a partnership between Polish and Ukrainian companies was needed for their operations.

Recent years have seen the liberalization of bilateral and transit freight resulting from the European Union-Ukraine agreement. The partial exemption from the requirement for permits has freed up market mechanisms in the Polish-Ukrainian relationship. Ukrainian carriers are actually participating in the transport market in Poland and the EU as a whole more on the basis of declarative fulfilment or undergoing the process of adjustment to EU requirements than actual fulfilment of those requirements. Ukrainian transport, moreover, has far lower costs and overriding priorities related to securing the needs of the military, supplying the economy in a state of war and fully open humanitarian transport. In these realities, it is very difficult to speak of equal competition or a market of equal economic opportunity. Unfortunately, this results in dissatisfaction for Polish carriers, who have had very limited access to the Ukrainian market for several months. Initial and limited free access to the EU market for Ukrainian carriers has turned into euphoria and uncontrollable expansion of these companies into Polish market and further in Europe. With, until recently, a great scarcity of contacts in the relationship of the competent ministries responsible for road transport, the general economic relationship in this area is based on distrust and unhealthy, not always fair, competition. The governments of both countries urgently need to rebuild complete trust in the dialogue and commitments made. Implementation of the often tough compromises must be timely and transparent, using social observers from the business sector.

10. Strengthening transportation ties between Poland and Ukraine in the European market

Ukraine and Poland have a strategic opportunity to strengthen transportation ties in the European market by leveraging their geographic proximity and the evolving European connectivity framework[5]. The European Commission's proposal to extend four EU Transport Corridors to Ukraine (and Moldova) underscores the recognition of Ukraine's transportation system as an integral component of the broader EU connectivity network. This strategic alignment lays the groundwork for deeper economic integration via trade and participation in regional value chains.

A key step in reinforcing these ties involves aligning Ukraine's domestic infrastructure policies with EU strategic priorities. This means identifying mutual interests across transportation networks, digital connectivity, energy infrastructure, and social services and working with the EU to coordinate investments. Such collaboration ensures that project pipelines, timelines, and funding mechanisms align to maximize the impact of each investment and foster a cohesive, complementary network that benefits both Ukraine and its EU neighbors.

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Enhancing cross-border infrastructure is crucial for Poland and Ukraine specifically. Joint investments in transportation networks that connect the two countries, like upgraded rail links and efficient road transport corridors, can significantly improve regional connectivity. Creating logistics hubs near border crossings, streamlined customs processes, and modernized digital systems would expedite cross-border trade, reducing delays and ensuring seamless goods movement. This streamlined infrastructure could transform Ukraine and Poland into vital gateways between the EU and Eastern Europe.

Collaboration between Ukraine and Poland should foster trust and cooperation by pursuing projects promoting mutual economic interests and reinforcing regional partnerships. Coordinating transportation and digital infrastructure investments will empower businesses to expand their market reach, tapping into regional value chains. This collaboration will also strengthen Poland's role as a key EU transport hub and deepen Ukraine's ties with the EU, particularly as Ukraine seeks full EU membership.

Deepening transportation ties between Ukraine and Poland will require sustained collaboration and strategic alignment with EU initiatives. The two countries can transform their connectivity infrastructure by working together, opening new economic opportunities while reinforcing European resilience and integration.

5 https://transport.ec.europa.eu/news/commission-amends-ten-t-proposal-reflect-impacts-infrastructure-russias-war-aggression-against-2022-07-27_en

11. Recommendations for Ukraine and Ukrainian companies related to EU Accession

Ukraine, declaring its commitment to legal and organizational preparation for accession to the European Union, should undertake real preparatory work in road transport so that Ukrainian companies can reliably confirm their compliance with all EU requirements to carry out transportation in the territory of EU countries. It should be borne in mind that upon accession, all bilateral agreements with individual EU countries will cease to be in force, and the only legal basis for the activities of Ukrainian transport companies will be EU law, along with possible derogations resulting from negotiated transition periods. The preparatory work undertaken should concern, in particular, the adaptation of Ukrainian legislation to EU standards, the resolution of the problem of border infrastructure, the destruction of road infrastructure caused by Russian aggression, and the implementation of all technical requirements. These activities should also ensure fair competition in bilateral relations between Polish and Ukrainian entrepreneurs. Ukrainian transport companies should take into account that the transitional period of additional entitlements and exemptions from procedural rigors for Ukrainian entities caused by Russian aggression will soon end and Ukrainian entities will have to adapt to the European rules and standards, common to companies, and therefore, it is worthwhile to prepare as well and as thoroughly as possible now in the following areas:

Modernization and expansion of border infrastructure

The current border crossings between Ukraine and Poland cannot handle the massive flow of vehicles, including the transport ones. With the support of Polish authorities and EU institutions, the Ukrainian government should prioritize constructing new border points and expanding existing ones to manage traffic more efficiently. Infrastructure should include dedicated lanes for trucks, buses, and private vehicles to streamline clearance processes. Also, logistics centers with appropriate document controls, customs facilities, and driver amenities could speed up the inspection and clearance of goods, reducing delays. This includes increasing staffing at border points. Employing more customs staff, border inspectors, and specialized sanitary and veterinary officers would reduce congestion and speed up clearance procedures, especially for goods that require rapid transit, such as perishable foods.

Regulatory harmonization

Aligning Ukraine's regulatory framework with EU standards is critical to preparing Ukraine for EU integration. Without harmonizing regulations on transport documentation, driver working hours, smart digital tachographs, or meeting green transport and low-emission vehicle standards, Ukrainian companies will not be able to provide their services in the common European market. In addition, Ukraine should implement stricter regulatory controls to meet competition challenges from neighboring countries, providing that carriers meet EU labor and environmental standards to ensure fair competition. Already today, at the stage of EU negotiations, Ukrainian transport service entrepreneurs should apply adequate European rules and regulations to smoothly enter the common European market.

Rebuilding and improving internal road infrastructure

The destruction of Ukraine's road network and bridges, especially in regions such as Donetsk, Kherson, and Zaporizhzhia, requires an urgent reconstruction plan. This process should include repairing the existing road infrastructure and modernizing and creating modern transportation corridors to ensure the efficient movement of goods within the country and toward Poland and other EU countries. Partnerships with the EU should be strengthened to finance and coordinate these infrastructure projects, ensuring that Ukraine can integrate seamlessly into European transport networks. This will be especially important now that Ukraine has been admitted to the EU and the borders have been opened.

Improving professional competence

Ukraine should invest in training programs that will help drivers, transport managers, and the entire staff of transport companies obtain proper certificates of professional competence that comply with EU standards. Ukrainian authorities should begin working with educational institutions and industry associations to provide comprehensive training to ensure that Ukrainian carriers are up to date with the latest regulations, EU standards, and safe operating practices.

Facilitating and developing adequate transportation management systems

Implementation of digital systems for licensing, registration, and customs clearance should be a priority. These systems should be secure, easy to use, and capable of seamless data sharing between customs agencies and carriers. Providing accurate, up-to-date information would increase transparency, improve efficiency, and reduce the corruption still present in Ukraine.

Ukraine can significantly improve its motor transport sector's resilience and competitiveness, helping it adapt to EU standards while strengthening its position in the European market. Coordinated efforts between Ukraine and Poland will help resolve border issues. Increased cooperation, transparent regulations, and investment in infrastructure will prevent conflicts and promote healthy competition in business operations. The Ukrainian side should treat the goals of international business and the interests of the Community as equal and fully compliant with the national interests. Polish carriers, carrier organizations, and road transport experts are open to cooperation and assistance to Ukraine on its way to access the European Union.

The Warsaw Enterprise Institute (WEI) is a leading Polish think tank originating from the Union of Entrepreneurs and Employers. Established to enhance Poland's prosperity, WEI focuses on four critical areas: State and Law, Security, Economy, and Demographics. WEI provides solutions for state institutions and independent social or commercial entities through rigorous research, analysis, educational projects, and publication of commentaries, stances, memoranda, and reports.

WEI believes that Poland's security and the prosperity of its citizens depend on their rights and freedoms, including the right to choose their way of life, equality before the law, and the right to accumulate wealth. WEI advocates for a strong and efficient state to protect against injustice and external threats but emphasizes that the state's role should be minimal to foster entrepreneurial energy and spirit.

WEI's key areas of focus are:

State and Law. WEI is dedicated to improving the quality of laws, the legislative process, and their application and enforcement in court proceedings. WEI supports a legal framework based on simplicity and the natural order, advocating for minimal regulation and emphasizing voluntary agreements and contracts. The organization promotes a strong but limited state focused on ensuring security and justice for its citizens.

Security. Learning from historical experiences, WEI supports Poland's participation in defense pacts and international organizations while emphasizing self-reliance, with the Polish Army as the key guarantor of national independence. WEI advocates for a professional army capable of effectively countering potential threats and stresses the importance of energy security by diversifying energy sources and supply routes. The institute supports Poland's presence in the EU as an economic community but opposes the concept of a single European state dominated by bureaucracy. Poland's foreign policy, according to WEI, should prioritize national political and economic interests.

Economy. WEI asserts that a robust economy is essential for funding national defense, improving living standards, and halting depopulation. The institute calls for straightforward business regulations, low and simple taxes, and an efficient judiciary. WEI opposes harmful taxes and bureaucratic barriers, advocating for equal conditions for business competition and focusing on small and medium-sized enterprises (SMEs), the backbone of the Polish economy. Educational reform to align with job market needs and limited state participation in the economy, except in military and energy sectors, are also crucial economic policies WEI promotes.

Demography. Addressing unfavorable demographic trends is crucial for achieving WEI's goals. The institute supports policies to increase birth rates, curb emigration, and implement sensible immigration policies. Strengthening families' legal and social position to encourage higher fertility rates is a priority. WEI believes in allowing citizens to retain more earnings to support child-rearing and advocates for localized social support policies targeting only those in need.

WEI maintains a nonpartisan stance, supporting beneficial national solutions regardless of political origin. WEI collaborates with Polish authorities through professional analysis and active public engagement in strategic planning, policy development, and implementation, contributing to Poland's development and prosperity.

The Institute for Economic Research and Policy Consulting (IER) is the leading Ukrainian independent think tank focusing on economic research and policy advice. It has more than 20 years of experience in economic policy analysis and the development of policy recommendations. Since 2016, the IER actively supports regional civil society organizations in Ukraine through re-granting, mentoring, training, and awareness-raising campaigns.

IER's mission is to provide alternative solutions to key problems of social and economic development in Ukraine based on the rule of law, democracy, and market economy principles. The IER's special focus is on promoting the EU-Ukraine Association Agreement.

The IER aims to:
1. provide top-quality expertise in the field of economy and economic policy-making and developing strategic and instrumental components of the economic policy;
2. formulate a public opinion through the organization of public debate, facilitation of public dialogue and spreading knowledge;
3. contribute to the development of economic and social sciences and promote the development of the Ukrainian research community.

Since its establishment in 1999, the IER has focused on economic research and policy advice in macroeconomic policies, business climate, small and medium entrepreneurship (SME) development, international trade, financial markets, and regional and sectoral development. Since the early 2010s, the IER has been extensively focused on promoting the European integration of Ukraine.

The IER's particular strength is monitoring business attitudes and expectations towards various aspects of the business environment and regulation, including policy impacts, by conducting regular and ad-hoc business tendency surveys. Since July 2002, the IER has held a regular quarterly survey of 450 industrial enterprises in Ukraine to monitor, forecast, and analyze business activity based on the information received "from the ground up" judgments and economic agents' anticipations. Since May 2022, the survey has been conducted monthly and covered 500+ from all controlled by GOU oblasts. The IER has developed an Annual Business Climate Assessment – a policy tool for monitoring and assessing business climate and SME development based on firms' perceptions and attitudes. Annually the IER has conducted 1000+ enterprises regarding trade facilitation issues and customs work assessment.

After 24 February 2022 year, the IER focused on supporting Ukrainian resistance to full--scale military aggression. Our activities are repurposed according to stakeholder needs. Since May 2022, the IER has run the Program "Analytics and Information of the Countries' Economy during the War Time." The IER produces and promotes monthly the analysis and forecast of the Ukrauaianin economy, including monthly surveys of 500+ enterprises. The IER is a member of the public initiatives RISE (a coalition of Ukrainian and international organizations working for Ukraine's Reconstruction Integrity, Sustainability, and Efficiency). Also the IER is the founder of the RRR4Ukiraine think tank initiative, which aims to promote honest and visionary recovery based on the principles of openness and accountability.

The IER successfully combines professional analysis with active involvement in public dialogue and advocacy and actively cooperates with Ukrainian national and regional authorities in strategic planning and policy development, and policy implementation. The IER has the capacity for grant management and provides re-granting for capacity development to regional civil society organizations and media.

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UKRAINIAN PATH TO
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