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FOREWORD

Vol. 11 No. 1 (2025)

Dear Readers,

Welcome to the latest issue of *Politics & Security*. This volume presents a compelling collection of articles that, taken together, illustrate the expanding and increasingly complex nature of security in the 21st century. The central theme that emerges from these diverse contributions is the critical need for adaptation—whether in industrial protocols, economic strategies, military doctrines, constitutional frameworks, or international relations. Our authors explore how established systems are being tested and reshaped by contemporary pressures.

The issue opens with Bogdan Kołcz's "Practical aspects of safety in dealing with major industrial accidents." This article provides a crucial examination of the formal and legal frameworks governing emergency preparedness. It highlights the indispensable role of practical training in mitigating the risks of industrial disasters, reminding us that the security of our communities is fundamentally tied to the resilience of our industrial infrastructure. Following this, Hanna Malchenko shifts our focus to economic stability in "Ensuring the economic security of trucking companies in the United States." By analyzing key performance indicators within small and medium-sized trucking firms, the paper sheds light on the vulnerabilities and strengths of a sector that forms the backbone of the supply chain. It offers strategies for bolstering economic security, a vital component of national strength.

In "The Israeli Security Doctrine: Adapting Without Altering Core Pillars," Simeon Popov offers a sharp analysis of military and strategic adaptation. The article traces the evolution of Israel's core security principles—deterrence, early warning, and decisive victory—arguing that they have remained intact while adapting to modern asymmetric threats. It is a fascinating study of how tradition and innovation coexist in national defense. The theme of institutional design is taken up by Kateryna Tiazhorob in "The Institute of the Presidency in Ukraine: Constitutional Foundations and Prospects for Reform." This paper explores the functional balance within Ukraine's presidential system, arguing that a well-defined constitutional framework is essential for political stability and effective governance, forming a bedrock of national security.

Finally, Wojciech Pac, in "Challenges and Strategies in Poland's Policy Towards Ukraine in the Context of Migration," addresses the deeply relevant issue of human security and interstate relations. The article navigates the complexities of Poland's migration policy, examining the strategic challenges and opportunities that arise from large-scale population movements and their profound impact on both nations. These five articles provide a panoramic view of modern security challenges. From the plant floor and the highway to the battlefield and the halls of government, they demonstrate that security is a holistic concept requiring constant vigilance and intelligent adaptation.

We extend our sincere gratitude to our authors for their insightful contributions and to the tireless work of our peer reviewers and editorial staff. We trust that you will find this issue to be both engaging and thought-provoking.

Sincerely,
Igor Britchenko
Editor-in-Chief
Politics & Security

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PRACTICAL ASPECTS OF SAFETY IN DEALING WITH MAJOR INDUSTRIAL ACCIDENTS

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Abstract: *The article presents issues concerning selected elements in the field of organising and conducting practical exercises to prepare rescue entities and teams of upper-tier establishments for major industrial accidents in the aspects of formal and legal requirements for the managers of an establishment, the authorities of the State Fire Service in the context of the tasks performed in relation to the needs of the society. In this respect, a review was made of European Union and national legal acts relating to selected preparatory elements of the system for preventing major industrial accidents and the requirements for the operators of upper-tier establishments and the organs of the State Fire Service in the event of a major industrial accident. Moreover, on the basis of practical participation in the exercises, the course of various forms of practical exercises related to the consolidation of principles of proceeding in case of an emergency situation was evaluated. The topics were based on new legal regulations in the field of environmental law and the requirements to be met by practical exercises preparing services and company teams to limit and eliminate hazards.*

Keywords: high-risk facility, practical exercises, emergency plan.

INTRODUCTION

Nowadays, it is possible to list a wide range of hazards that constantly affect public and occupational safety. The development of areas such as industry and transport, in addition to positive civilizational changes, has brought a corresponding increase in the occurrence of risks to people (Steumpfle, Howells, Armour, & Boulet, 1996). As a result of incidents that have occurred in plants using dangerous substances, posing a risk to people and the environment, legal regulations have been enacted in various countries regarding safety in industrial plants and the safety of surrounding local communities (Michalik, 2005). The most important of these regulations is the Seveso III Directive—Directive 2012/18/EU of the European Parliament and of the Council of 4 July 2012 on the control of major-accident hazards involving dangerous substances, which amended and subsequently repealed Council Directive 96/82/EC (Directive 2012/18/EU, 2012). This directive was implemented into Polish law in the Act of 27 April 2001, the Environmental Protection Law (Act of 27 April 2001 on Environmental Protection Law, 2001).

Taking into account the element of preparedness for a major industrial accident, the obligations of the Member States of the European Union under Article 12(6) of the Directive include ensuring that internal and external emergency plans are reviewed, tested, and where necessary, updated by the operators and designated authorities at suitable intervals of no longer than three years (Directive 2012/18/EU, 2012). The review shall take into account changes occurring within the establishment or safety services concerned, the latest technical knowledge, and knowledge concerning the response to major accidents (Kołcz, 2023a).

In view of the above, the research problem addressed in this article is the performance of tasks related to drills by upper-tier establishments operating under the major-accident prevention system. This implies the need to determine whether the formal-legal requirements indicate the necessity of undertaking practical drills by establishment teams preparing for emergency response in the danger zone. Moreover, it is crucial to assess whether the mechanisms of practical exercises, when they take place, will

minimize the effects of a major accident on people, the environment, and property by preparing forces and resources for a proper response in an emergency situation (Lesiak, & Porowski, 2012).

For the purpose of this paper, theoretical and empirical research was carried out. The paper is based on an analysis of legal acts and literature, as well as direct observation, to specify practical elements that should be implemented by operators in order to improve the system of major-accident prevention (Regulation of the Minister of Internal Affairs...,2016).

LEGAL CONSIDERATIONS FOR SELECTED ELEMENTS IN UPPER-TIER ESTABLISHMENTS FOR THE PREVENTION OF MAJOR INDUSTRIAL ACCIDENTS

Pursuant to Art. 261. item 3 of the Environmental Protection Act, the operator of an upper-tier establishment is obliged to analyse and practice the internal emergency plan at least once every 3 years in order to update it and make justified changes to it; in particular, the changes introduced to the installation, the way the fire protection units operate, the state of knowledge concerning preventing, combating and removing the effects of an industrial accident, as well as scientific and technical progress should be taken into account.

In order for the operator to fulfil the above-mentioned statutory requirements concerning practising the procedures for preventing major industrial accidents and implementing the internal emergency plan, after agreeing common time arrangements, a co-operative exercise is planned between the high-risk establishment and the rescue services of the State Fire Service and the entities included in the internal emergency plan.

An analysis and exercise of the internal emergency plan shall be carried out with a view to updating and making any reasonable adjustments to the plan.

The main objectives of the exercise include:

- to consolidate the rules of conduct in the event of an emergency (alerting the State Fire Service, people in the vicinity, other functionaries according to the procedure contained in the internal operational and rescue plan,
- testing the rescue procedures in the event of an industrial emergency (fire, release of a dangerous substance) included in the internal operational and rescue plan,
- perfecting the functioning of the company's management team - testing the skills of the engineering and technical staff,
- Checking the operation of the early warning and notification system, - Checking the efficiency of fire-fighting equipment,
- checking the efficiency of fire-fighting equipment (fire switches, hydrants, hand-held fire-fighting equipment),
- carrying out evacuation of plant employees from the administrative building and production facilities,
- perfecting cooperation with the incoming commander of the State Fire Service and informing the rescue operation commander about possible threats.

In particular, these exercises should take into account the proper organisation of preventive and rescue actions in the context of proper preparation of the engineering and technical staff and employees of the plant to jointly improve the way in which they prepare for and protect themselves against emergency situations in the event of their occurrence by using elements that are decisive for the ability to reduce the level of risk both for employees in their workplaces and through the proper conduct of rescue actions that minimise the effects on people, the environment and material values (European Parliament and Council, 2012).

Further taking into account the task aspect according to Art. 265. para. 9 also the regional commander of the State Fire Service, on the basis of information presented by the operator of an establishment with a high risk, after drawing up an external emergency plan for an area exposed to the effects of an industrial accident, is obliged to analyse and practice the implementation of the external

emergency plan at least once every 3 years, in order to introduce the necessary changes to it; in particular, the changes made to the installation, the way in which the fire protection units operate, the state of knowledge concerning the prevention, combating and elimination of the effects of an industrial accident, as well as scientific and technical progress should be taken into account (Obolewicz-Pietrusiak & Wojnarowski, 2001).

In this respect, the provincial commander of the State Fire Service on the basis of Article 265(9) of the Act of 27 April 2001. Environmental Protection Law, in most cases orders the preparation and carrying out of a practical-application rescue drill on the implementation of selected elements of the external emergency plan for a high-risk establishment (Konieczny, 2001).

The main purpose of the exercise is to test the principles and procedures contained in the external emergency plan for the establishment, in particular regarding:

- 1) the participation of plant personnel and management in notifying and alerting emergency services and external entities of the danger and in undertaking rescue operations and directing these operations until fire protection unit forces and resources arrive on site;
- 2) alerting and evacuating people from the area outside the site of the establishment and notifying establishments and other neighbouring entities in the event of a major industrial accident;
- 3) cooperating with representatives of establishments and neighbouring institutions in taking measures in the event of the impact of a major industrial accident on their areas;
- 4) practical participation of the forces and resources of the CSR, taken into account in the external emergency plan, in liquidation of a simulated hazard arising on the site of an establishment;
- 5) the participation of other emergency services, entities and self-governing bodies foreseen to take action in the event of a hazard involving areas outside the establishment in the event of a major industrial accident.

In this context, the aim may also be to check the state of preparedness of forces and means for conducting the rescue action, in the scope of elimination of hazards by:

- 1) using the tactical and technical capabilities of the equipment and facilities of the fire protection units participating in the exercises,
- 2) perfecting the skills of commanding tactical associations by the command staff of the State Fire Service,
- 3) perfecting the methods of organising the point of reception of forces and means,
- 4) organisation of communication for the needs of conducted rescue actions,
- 5) organisation of action headquarters,
- 6) organisation of logistic and technical facilities for the needs of conducted actions.

The premise of the exercise includes one of the scenarios included in the safety report, the occurrence of which will result in an industrial accident impacting on a site outside the area of the aforementioned establishment.

To this end, the government administration body shall require those responsible for preparing and conducting the exercise to:

- 1) make all arrangements with the management of the above-mentioned establishment and the entities foreseen to participate in the exercise with regard to the detailed conduct of the exercise;
- 2) draw up and submit detailed exercise documentation for approval;
- 3) draw up, together with the management of the abovementioned establishment and the entities participating in the exercise, conclusions resulting from the scope of the exercise in the context of possible changes or corrections to the external emergency plan for the abovementioned establishment.

PRACTICAL GUIDANCE FOR CARRYING OUT EXERCISES IN UPPER-TIER ESTABLISHMENTS AGAINST MAJOR INDUSTRIAL ACCIDENTS

Comparing the above issues, it can be seen that the tasks differ fundamentally in relation to the objective of the exercise. The exercises of the internal emergency plan focus in particular on the actions of mitigation and elimination of the effects of a major industrial accident in relation to the source of danger in a given installation of a plant, performed by engineering and technical personnel, company services and rescue

entities. Therefore, it can be concluded that this aspect is focused on locating the accident as soon as possible and taking appropriate actions to remove the hazard.

It should be emphasised that the external emergency plan exercise is focused on the actions taken outside the plant towards neighbouring institutions and the execution of tasks by rescue entities and services cooperating with the local administration (Michalik, 2005).

In the preparation process of training against major industrial accidents through the use of various forms of exercises, it is observed that not all the assumed objectives are implemented during the exercises. This is often caused by not respecting the time regime assumed in the organisation of exercises. Focusing too extensively on selected elements in application or practical IROP exercises, in particular on the process of noticing the emission of a hazardous substance, detecting and determining the location of its source of emission before the arrival of forces and resources or the very process of taking action by company teams causes that, at a later stage, the exercise takes place, for reasons of time, in a limited scope in relation to elements connected with the performance of tasks by local administration, emergency management bodies and public safety and order services (Kończ, 2023b).

It is in the emergency management system at the municipal government level that the basic tasks that relate to monitoring, warning, alerting, planning, response and recovery from major emergencies in their area should be practised. These tasks will also relate to evacuation, medical assistance, social assistance, providing the necessary conditions for survival. Analogous tasks should be rehearsed by the districts supported by the composite administration, which are responsible for coordinating activities at district level. The voivodship level should also be involved here, which in turn is responsible for the cooperation of governmental and self-governmental administration bodies, directing their activities in the field of risk prevention, maintenance of public safety and order, prevention of natural disasters and other hazards and combating and removing their effects (Komenda Główna Państwowej Straży Pożarnej, 2021).

Conclusions on the implementation of selected elements of the external emergency plan of a high-risk establishment indicate the main objective of the exercises which is to test the principles and procedures contained in the external emergency plan of the establishment. The exercises should be attended by officers of the State Fire Service and representatives of the Voivodeship Inspectorate of Environmental Protection, the Poviát Inspectorate of Building Control, the crisis management structures of the Poviát Starosty, the Town and Municipality Office and the engineering and technical staff together with plant teams. It should be emphasised that the practical part should involve, among others, the forces and resources of the Specialised Chemical and Ecological Rescue Groups. The indicated mechanisms should minimise the effects of a major accident on people, the environment, property through the preparation of forces and resources, appropriate actions, proper response in an emergency situation (Regulation of the Minister of Internal Affairs..., 2021).

Referring to selected elements of safety against major industrial accidents, empirical research was carried out using a diagnostic survey method with questionnaires among employees of management teams and engineering-technical groups of establishments at high risk of a major industrial accident and rescuers of a specialised chemical-ecological rescue group. The survey used closed questions that required the selection of one or more answers concerning prevention, response and cooperation in an emergency situation. The survey included questions in the form of a questionnaire, two of which were: 'which form of exercises brings the most benefits in terms of acquiring knowledge and practical conduct in the establishment' and "how often is there a need to organise joint exercises with rescue entities in the establishment where you work (Announcement of the Marshal of the Sejm, 2022).

The survey therefore referred to the used form of improvement of their skills by company teams and services and rescue entities. The indications of the respondents in this respect are presented in Fig.1.

On the basis of the respondents' answers, we notice various references to the quality and quantity of the organised exercises of rescue entities and company teams. The first aspect concerns the form of exercises that are preferred by the survey participants. It turns out that, similarly to PSP, ZDR indicate mainly practical exercises with the development of a common assumption (refers to greater interaction between PSP and ZDR) and a theoretical discussion with the specification of conclusions after the practical execution of a given exercise assumption. This aspect was unanimously indicated by 60-70% of the respondents from ZDR and up to 83% from PSP (Komenda Główna Państwowej Straży Pożarnej, n.d.).

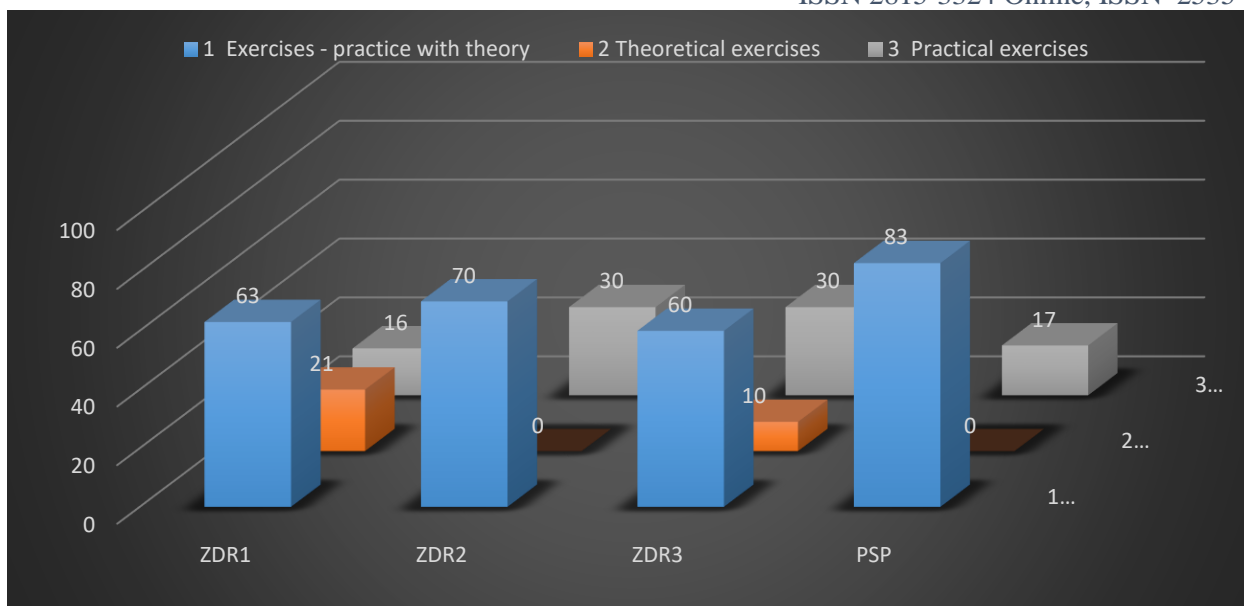
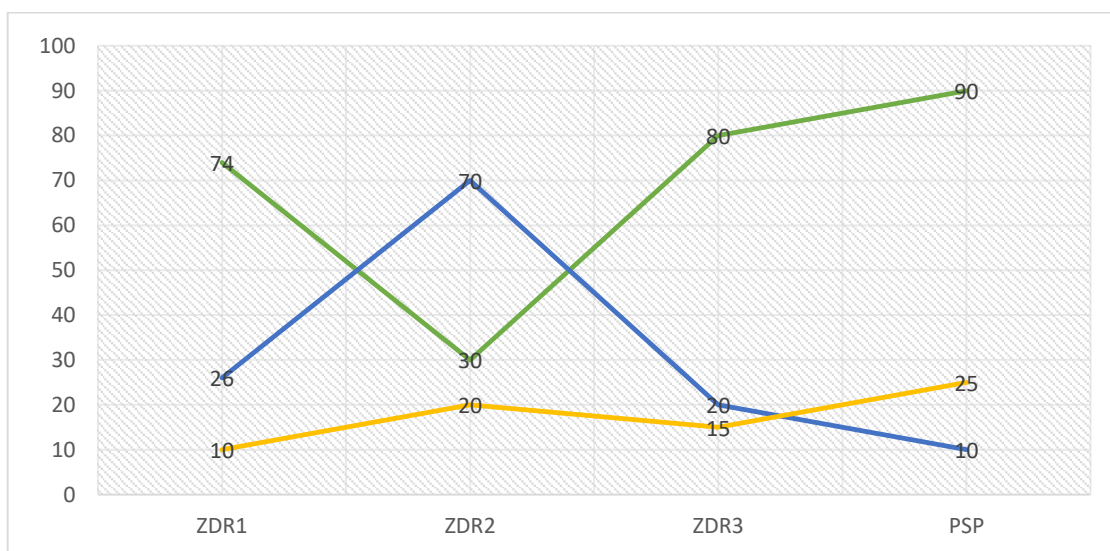


Fig. 1. Percentage distribution of answers to the question 'which form of exercises brings you the most benefits in terms of knowledge acquisition and practical conduct' with respondents answering according to the following designation: 1- Exercises combined practical development with theoretical discussion of an assumption and presentation of conclusions; 2- Exercises within the framework of theoretical familiarisation with the possibilities of the given entities, installations; 3- Practical exercises through joint development of a given assumption.

Source: Own study.

In the second study, we see that most respondents prefer exercises once a year, except for one company that wants to do it twice or even more (Fig. 2). It can be assumed that this process results from the specificity of the company, depending on the number of installations, as well as organizational tasks, conditioned by the time of qualification to high or increased risk.



Legend:

- Exercises twice a year
- Exercises as desired
- Exercises once a year

Fig. 2. Percentage distribution of responses to the question: "how often does the company you work in need of organizing exercises in cooperation with rescue entities?" Source: own study.

Since the exercises were assigned by the legislator to be performed at least once a year, in connection with the above, the survey of respondents also indicates that such an amount of training of plant teams and rescue entities is acceptable. However, the essence is the quality of these exercises, the goals we want to achieve and the effectiveness associated with the familiarity of the exercisers with the equipment, facility or terrain, the consolidation of habits while maintaining the degree of difficulty, taking into account the systematicity that determine the effectiveness of this form of training (Skoczek, 2023).

CONCLUSIONS

The scope of practical exercises carried out indicates the formulation of the following observations and conclusions, in the context of making possible changes or updating data in the internal and external operational and rescue plan. A sudden release of a hazardous substance as a result of a failure, caused for example by atmospheric discharge, may create a fire or explosion hazard, and consequently the creation of a toxic gas cloud, which will most likely spread outside the plant premises. Depending on the prevailing weather conditions (wind force and direction, precipitation, atmospheric pressure) and the terrain, neighbouring plants, residential areas and nearby forests and communication routes (road and rail) may be at risk. Therefore, it is very important to test in practice the alarming and notification of the existing threat to services, inspections and guards, as well as those plants, offices, institutions and other entities that will be exposed to the danger associated with the risk of an industrial failure and the effects of which may affect outside the plant. In order to warn plant employees, residents and people staying in the area potentially at risk of the effects of a serious industrial accident, notification and alarm systems operating within plants, as well as within local government units at the municipal and district level, should be maintained in constant readiness and technical efficiency. Early warning systems (manual fire alarms, alarm sirens, stationary and mobile public address points), communication (voice, radio, telephone), mass media (television, radio) and social communicators (internet, text messages, applications, etc.) should be used for this purpose. To this end, the mutual alarm and notification system should be continuously improved in practical exercises, which will minimize the risk of secondary losses for plants, employees staying in the area and people in the vicinity of the plant.

In the event of a serious industrial accident, a "domino effect" may occur, which may result in a series of unforeseen events, occurring one after another and difficult to control, and posing a risk of fire and/or explosion both on the premises of the plant and outside its area, on the premises of neighbouring plants, forest areas, development areas, etc. Therefore, exercises should take into account the most unfavourable scenarios, taking into account the potential effects on people, the environment and property and the range of their impact in the event of leakage and release of a hazardous substance and fire. In the event of a serious industrial accident, cooperation and collaboration of services, inspections, guards, entities and institutions involved in the implementation of rescue operations and other tasks in the scope of limiting and removing the effects of this accident on the plant and outside its premises is very important. For this purpose, the head of the rescue operation should appoint a staff during practical exercises. The staff, including its individual teams, should involve representatives of the services, inspections and guards, crisis management structures, as well as employees of neighbouring plants who have knowledge and experience that constitute a valuable source of expert and specialist knowledge, particularly in terms of knowledge of technological processes, physicochemical properties of substances used in production, installations and devices exposed to failure and damage, and threats and hazards that may occur on the premises of these plants.

During the practical exercises in the scope of managing the evacuation of employees from the danger zone, the person in charge of the plant rescue operations should receive feedback on the number and health condition of the evacuated persons and whether all the persons from the endangered area were evacuated. Information on the course of the operations after the arrival of the first forces and means of fire protection units should be passed on by the employee responsible for managing the rescue operations on the premises to the person in charge of the rescue operation (KDR). It is important that this person remains

in constant contact with the KDR until the rescue operations are completed. For easier identification, this person should be marked (e.g. reflective vest, identification card).

The production activity of plants related to the production of products with a very wide range of applications may pose a risk of a serious accident, due to the use of hazardous substances/mixtures. In such a case, emergency scenarios should be developed for individual installations, together with a definition of the range of their impact in the event of a release, including the zone; toxic/flammable hazard, thermal radiation, overpressure wave. The substances/mixtures listed in the internal operational and rescue plan have safety data sheets that describe, among other things; their physicochemical properties, conditions for their safe use, types of threats they may pose to life, health and the environment, including in the event of a fire. The proper selection and speed of application of the extinguishing agent that will be used in the extinguishing system and by the fire brigade units arriving at the scene of the incident is of great importance for the effectiveness of practical exercises during the simulation of a fire. Due to the potential danger that chemical compounds may pose in production processes, it is necessary to consider equipping plants or organizational units of the State Fire Service with extinguishing agents dedicated to extinguishing a given group of fires. An important task element in the process of maintaining the continuity of extinguishing agent supply in the event of a fire, e.g. of polar liquids on the installation, is to immediately ensure the transport of foaming agent necessary for rescue and firefighting operations. In connection with the above, this element should also be practiced in practice. In such an event, it is important to effectively supply foam streams in order to secure and extinguish the fire and, what is very important, to use the appropriate foaming agent, e.g. AFFF for polar liquid fires resistant to alcohols.

Practical exercises carried out on plant installations containing tanks with various chemical substances show that in the event of an industrial accident (toxic substance leakage and fire), an efficient and effective foam extinguishing system and a plant water supply network are necessary, providing the appropriate amount of extinguishing agent needed to conduct effective rescue and firefighting operations. The existing water supply network should allow for simultaneous supply of extinguishing currents from portable cannons, which in the event of a large fire will ensure sufficient efficiency of the extinguishing agent. Therefore, it seems reasonable to analyze the possibilities of increasing the efficiency of the plant water supply network and its practical testing during exercises in order to maintain the continuity of extinguishing agent supply and achieve effectiveness in action. During exercises, it should also be considered to organize additional water supply, using, for example, fire tanks located on the premises of neighboring plants. Taking into account the above indications, it should be recognized that practical solutions will contribute to improving the process of prevention and preparation for combating serious industrial accidents in high-risk plants. This condition is the proper organization of practical exercises cooperating with the application of evaluation of their course, paying attention to the practical elements that need to be actually practiced, with adherence to time rules, an appropriate number of practical exercises combined with a discussion of conclusions and the selection of appropriate forces and resources.

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ENSURING THE ECONOMIC SECURITY OF TRUCKING COMPANIES IN THE UNITED STATES

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Abstract. *The paper examines the key performance indicators of ensuring the economic security of U.S. trucking companies taking into account the market environment of small and medium-sized companies. A monographic review of literature sources in the field of studying the conceptual apparatus of economic security, methodological tools, modern technological changes, resource provision, marketing and logistics, management decision-making, regulatory policy in transport, transport infrastructure and features of functioning of U.S. trucking companies for the period of research (2019-2023) is carried out. To study the economic security of U.S. trucking companies the following indicators – operating ratio, fuel costs, driver turnover rates, and freight demand were selected. For each indicator, an economic assessment was carried out and a description of its content was provided, taking into account the specifics of small and medium-sized U.S. trucking companies. The results of the evaluation allowed proposing strategies to ensuring the economic security of U.S. trucking companies, taking into account the prospects for their sustainable development and response to current challenges.*

Keywords: operating ratio, fuel costs, driver turnover rates, freight demand, economic security, trucking company.

INTRODUCTION

In the context of an increasingly globalized and volatile economy, ensuring the economic security of enterprises in the transport and logistics sector has become a pressing academic and practical concern. Trucking companies, in particular, occupy a central position in the supply chain, facilitating the continuous movement of goods across regions and borders. Given their strategic importance, disruptions in their economic stability can have significant ripple effects on trade, industry, and regional development.

Economic security for a trucking company encompasses the ability to maintain stable financial operations, adapt to external economic shocks, and sustain long-term growth. It involves the effective management of internal and external risks, including fluctuations in fuel prices, increased competition, evolving regulatory requirements, technological disruptions, and labor market constraints. These challenges are especially acute for small and medium-sized enterprises (SMEs) in the sector, which often operate with limited financial reserves and narrower margins for error.

In the United States, the trucking industry plays a pivotal role in the national economy, accounting for the transport of 72.6% of domestic freight by weight (American Trucking Associations, 2023). As a backbone of the American supply chain, the economic security of trucking companies is essential not only for the stability of logistics networks but also for broader economic resilience. Amid growing market volatility, rising operational costs, technological disruption, and evolving regulatory frameworks, ensuring the economic security of these enterprises has become a significant area of academic and policy interest.

Economic security in the context of the United States trucking companies refers to their capacity to maintain financial stability, withstand internal and external economic shocks, and ensure sustainable development in a highly competitive environment. This encompasses effective cost management, strategic investment, risk mitigation, and adaptability to shifting market conditions. For small and medium-sized

carriers, which constitute the majority of the industry, these challenges are particularly acute due to limited access to capital, workforce shortages, and increased exposure to macroeconomic pressures.

This research aims to examine the concept of economic security within the United States trucking sector, identify the key threats and vulnerabilities faced by carriers, and evaluate the strategies and policy tools that can enhance their long-term stability. By integrating theoretical perspectives with industry-specific data, the study seeks to contribute to a deeper understanding of how trucking companies can safeguard their economic interests in an increasingly uncertain environment.

MATERIALS AND METHODS

This study employs a mixed-methods approach to examine the economic security of trucking companies in the United States, qualitative data to develop a comprehensive understanding of the challenges and strategies relevant to the industry.

Literature Review : Ensuring the economic security in a trucking company is not a one-time initiative but a continuous strategic process. It involves financial discipline, operational efficiency, client risk management, digital protection, and workforce stability, environmental protection, etc. Companies that proactively invest in these areas are better positioned to withstand economic shocks, remain competitive, and grow sustainably. The research covers a variety of theoretical and methodological approaches to ensuring the economic security, including trucking companies. The author analyses the essence of the concept of security and EU regulations in the field of transport security (Zervina, 2020).

In our opinion, ensuring the economic security of trucking companies can be achieved through their technological development, active use of the marketing system and supply chain management. The authors, based on expert assessment, investigated the components of the process of technological development of a trucking company in the supply chain and the determining factors that affect the technological development of a transport company in supply chain marketing (Vaičiūtė et al., 2023). Other researchers have studied the processes of technological development of an enterprise through the prism of marketing. The article analyses and evaluates alternatives for the technological development of trucking companies in terms of the impact of marketing on the development and competitiveness of enterprise services, applies the method of expert assessment of the impact of marketing factors on the development of transport technologies and the quality of vehicles of a trucking company (Bazaras et al., 2022). In addition, the marketing of a trucking company is focused on increasing competitiveness, which is associated with a focus on consumer demands and the ability to create the value expected by the consumer. In this regard, the economic security of a trucking company should be focused on the challenges of the external environment and respond to relevant threats, for which the authors propose the use of the Business Canvas Model (Vasiliene-Vasiliauskiene et al., 2020). An important aspect of the economic security of a trucking company is timely monitoring and response to complaints from consumers. The authors analysed complaints about the services provided by trucking companies, which affect the image, quality of services, and profits – the constituent elements of economic security (Belo & Milhazes, 2023).

The economic security of a trucking company is inextricably linked to logistics. The authors applied various approaches to evaluation in logistics, including multi-criteria decision-making, full consistency, alternative measurement options, and ranking according to a trade-off solution to build an appropriate logistics model (Stević & Brković, 2020). Other researchers have analysed the synergy of technological development and logistics cooperation and assessed the impact on the trucking company's operations. For this purpose, they used indicators of the efficiency of information technology use, indicators of the quality of innovative equipment, and the level of staff competence; they applied the method of alternative hierarchy analysis (Vaiciute et al., 2022). We believe that these indicators can be used in the process of ensuring the economic security of a trucking company.

Adapting the economic security of a trucking company to environmental conditions is now an important factor in achieving sustainable development. Trucking companies need to predict and address environmental safety issues, as this affects their economic and financial performance. The authors investigate the relationship between the amount of pollutants and the speed of transport (Vitkunas et al., 2021). There are studies of environmental indicators and their impact on the economic and environmental efficiency of transport (Hussain, 2022); an interesting study of the economic benefits of introducing zero-emission transport with SO₂ and CO₂ emissions (Pietrzak & Pietrzak, 2021).

Some indicators of ensuring the economic security of trucking companies are analysed in the authors' research. In particular, the authors used the multi-criteria method, the method of determining the order of preference by similarity to the ideal solution for evaluation, the coefficient of variance, and the CV-TOPSIS method

to analyse the sales and short-term liabilities of trucking companies (Vavrek & Becica, (2020). Other researchers have conducted a sensitivity analysis based on a neural model of the factors that affect the profit of a trucking company. The results show that the most important factors (fuel consumption of vehicles, driving style, average temperature and weather conditions) that affect the company's profit are (Rykala & Rykala, 2021). The researchers proposed a three-dimensional model and Ishikawa diagram methodology of the main elements of the economic security of an enterprise, which is based on the results of the enterprise's activities, costs and financial ratios (Prievoznik et al., 2021). The pricing system for truck rental was analyzed, which is reflected in the financial indicators and economic security of trucking companies (Cardazzi & Lawson, 2023). A component of the economic security of a trucking company is effective human resource management. The authors assessed the personnel of a trucking company using the age management approach using the Work Ability Index, which allows focusing on a selected group of employees for the purpose of in-depth study of their work abilities (Hlatka et al., 2021). Other authors investigated the relationship between corporate social responsibility and employee satisfaction in trucking enterprises, which is also reflected in ensuring economic security (Gonzalez-Morales et al., 2023).

The economic security of trucking companies is also focused on sustainable and inclusive development. In the study, the authors point to the need to increase the mobility of transport service users, use multimodal concepts, improve the quality and develop sustainable services (Kennedy et al., 2024). Other authors propose indicators of sustainable transport development and a new cause-and-effect cycle, using the system dynamics methodology (Moradi et al., 2022). In their own studies, the authors consider the dependence of the enterprise's economic security system on the concept of a circular economy using an appropriate model of quantitative, cost and regulatory indicators, using factor analysis (Kuzior et al., 2022).

The active use of digital and automated processes by trucking companies has a direct impact on economic security. The study considers the need to introduce electronic data exchange into the processes of a trucking company in order to increase the efficiency of communication between consumers and the trucking company (Klapita, 2021). In today's world, with the acceleration of technological processes and the emergence of the COVID-19 pandemic wave, all sectors of production and services, and especially trucking companies, face new challenges of technological development. Ensuring the economic security of trucking companies largely depends on the cybersecurity of intelligent transport systems. The author examines the factors of vulnerability of transport systems to cyberattacks and proposes a number of requirements for cars, including security (Singh, 2021). In order to counter cyber threats, the authors propose to carry out security co-analysis, which allows preventing transport accidents (Fan & Yang, 2022). In order to optimise technical and technological processes in trucking companies and infrastructure entities, the authors propose the use of the Truck Appointment System to reduce truck congestion, change truck schedules by companies (freight forwarders), which directly affects economic performance and economic security (Im et al., 2021).

The regulatory framework is an important component in ensuring the economic security of a trucking company. For example, the authors have studied transport legislation in the field of choosing legal forms of business, showing the dependence of the legal liability of the cargo carrier on its cost and risks (Poliak et al., 2020). Transport infrastructure significantly enhances the processes of ensuring the economic security of trucking companies. The formation of sustainable transport infrastructure has a positive impact on the economic performance of trucking companies. The study takes into account the elements of economic, environmental and social components that form a sustainable transport infrastructure, using a monographic review of literature (Badassa et al., 2020). The authors' research carried out in the field of ensuring safety of various modes of transport in the EU and in the world according to the relevant impact indicators; considered various safety management systems and new challenges to the safety of the transport system; proposed combine safety management system for the EU transport system (Bezpartochnyi et al., 2021)

It should be noted that scientific research has paid little attention to ensuring the economic security of trucking companies, especially considering the U.S. market. A wide range of research tools and indicators of economic security of trucking companies enhance the ability to provide a qualitative assessment and develop areas for improvement and sustainability in conditions of uncertainty or risky situations. Given the specifics of the U.S. transportation market, there is a need to study the economic and financial performance of trucking companies and to formulate key indicators for assessing the economic security of trucking companies.

Quantitative Analysis: Statistical data were gathered from publicly available sources, including the United States Bureau of Transportation Statistics (BTS), the American Trucking Associations (ATA), and the Federal Motor Carrier Safety Administration (FMCSA). Key performance indicators such as operating ratio, fuel costs, driver turnover rates, and freight demand were analyzed over a 5-year period (2018–2023) to identify economic trends and vulnerabilities in the trucking sector.

Data Collection Tools: Databases and Reports: BTS freight analysis framework, ATA trucking trends, FMCSA safety and finance reports.

Analytical Tools – Microsoft Excel and SPSS were used for data processing and statistical analysis.

Limitations: The study is limited by its focus on small and medium-sized trucking company, which may not reflect the experiences of large national carriers.

RESULTS

To conduct the study of economic security, we have chosen 10 small and medium-sized U.S. trucking companies (based on fleet size, revenue, and industry recognition) with estimated financial and operational data for 2019–2023 (Table 1).

Table 1. Top 10 small and medium-sized U.S. trucking companies (2019–2023)

Company	HQ	Fleet size (2023)	Revenue (2023, \$M)	5-Yr growth	Specialization	Key trends (2019–2023)
PGT Trucking	Monaca, PA	1.200+ trucks	\$350M	+25%	Flatbed, Heavy Haul	Expanded dedicated contracts; invested in driver retention programs.
Mercer Transportation	Louisville, KY	1.000+ trucks	\$300M	+18%	Flatbed, Oversized	High driver satisfaction (low turnover); grew regional routes.
TForce Freight (formerly UPS Freight)	Richmond, VA	6.500+ trucks	\$3B	-5% (sale to TFI)	LTL	Sold by UPS in 2021; now part of TFI International.
Dupré Logistics	Lafayette, LA	800+ trucks	\$250M	+12%	Energy, Chemical	Focus on safety tech (AI cameras); fuel cost challenges.
Dart Transit	Eagan, MN	2.500+ trucks	\$500M	+8%	Dry Van, Temp-Control	Struggled with 2022–2023 spot rate drops.
Bennett Motor Express	McDonough, GA	600+ trucks	\$200M	+15%	Flatbed, Specialized	Strong Southeast presence; added electric truck pilots.
AAA Cooper (Now part of Knight-Swift)	Dothan, AL	3.000+ trucks	\$700M	+10%	LTL, Regional	Acquired by Knight-Swift in 2021.
Melton Truck Lines	Tulsa, OK	1.500+ trucks	\$400M	+20%	Flatbed	High on-time performance; grew driver pay 25% since 2019.
Midwest Motor Express	Bismarck, ND	500+ trucks	\$150M	+5%	LTL, Regional	Focused on rural Midwest lanes; steady growth.
J&R Schugel	New Ulm, MN	400+ trucks	\$120M	+10%	Refrigerated	Invested in fuel-efficient trucks; low turnover.

Source: calculated by the author based on of data the Federal Motor Carrier Safety Administration

The table shows that small and medium-sized U.S. trucking companies thrived by specializing and controlling costs. The most successful prioritized long-term contracts, technology, and driver retention over rapid expansion. Most trucking companies grew revenue (5–25% over 5 years), driven by e-commerce demand (especially 2020–2021) and dedicated contract expansions (e.g., PGT Trucking, Melton Truck Lines). TForce Freight saw a decline (-5%) due to UPS’s sale and integration challenges and Dart Transit struggled post-2022 due to spot market rate drops. Fleet sizes remained stable or grew modestly (no massive expansions). Companies like Bennett Motor Express and J&R Schugel prioritized driver retention (low turnover) over rapid scaling. Biggest challenges for U.S. trucking companies are fuel costs (peaked in 2022, 30–35% of expenses) and driver wages (increased 15–25% since 2019). Regional trucking companies (Midwest Motor Express, J&R Schugel) grew steadily by dominating niche lanes; national carriers (PGT, Mercer) relied on diversified contracts to hedge against market swings. The economic security of U.S. trucking companies during the study period was actively influenced by investing in driver satisfaction (lower turnover), sustainable fleets (EVs, fuel efficiency), Tech-driven efficiency (AI routing, predictive maintenance), recession fears could soften freight demand, insurance/regulatory costs rising.

To assess the economic security of U.S. trucking companies, we have selected the following key performance indicators: operating ratio, fuel costs, driver turnover rates, and freight demand.

Operating ratio for small and medium-sized U.S. trucking companies presented in Table 2.

Table 2. Operating ratio for small and medium-sized U.S. trucking companies (2019–2023)

Company	2019	2020	2021	2022	2023	5-Yr trend	Key cost drivers
PGT Trucking	92%	94%	88%	90%	91%	Improved in 2021 (high demand)	Fuel, driver pay
Mercer Transportation	91%	93%	87%	89%	90%	Best in 2021 (spot rates)	Maintenance, insurance
TForce Freight	96%	98%	95%	97%	96%	Struggled post-UPS sale	Labor, integration costs
Dupré Logistics	93%	95%	90%	93%	94%	Volatile (chemical haul risks)	Fuel, safety tech
Dart Transit	94%	96%	89%	95%	97%	Spike in 2023 (spot rates fell)	Fuel, empty miles
Bennett Motor Express	90%	92%	86%	88%	89%	Consistently strong	Driver retention, flatbed rates
AAA Cooper	93%	95%	88%	91%	92%	Improved post-acquisition	LTL efficiency
Melton Truck Lines	89%	91%	85%	87%	88%	Top performer	Dedicated contracts
Midwest Motor Express	95%	97%	92%	94%	95%	Rural lanes = higher costs	Fuel, fewer backhauls
J&R Schugel	92%	94%	88%	90%	91%	Stable (refrigerated niche)	Reefer maintenance

Note: Operating Ratio (OR) = Operating Expenses / Operating Revenue (industry Avg. for SMEs: 90–95%)

Source: calculated by the author based on of data the American Trucking Associations and the Federal Motor Carrier Safety Administration

The table shows that the best operating ratio (OR < 90%) is achieved by Melton Truck Lines (85–88%) due to dedicated contracts (stable pricing), Bennett Motor Express (86–89%) due to flatbed specialization and low driver turnover, Mercer Transportation (87–90%) due to oversized freight premiums offset costs. Trucking companies have the worst performers (OR > 95%): TForce Freight (95–98%) due to high labor costs post-UPS divestiture, Dart Transit (89–97%) due to spot market dependence, Midwest Motor Express (92–97%) due to the use of rural routes, which led to empty return flights. The main factors affecting the operating ratio and ensuring the economic security of small and medium-sized U.S. trucking companies are specialization by dominating niche segments (flatbed, oversized, refrigerated), use dedicated contracts, record-high freight rates, pent-up post-COVID demand, tight capacity, fuel efficiency, driver retention, asset utilization.

Detailed comparative analysis of fuel costs for small and medium-sized U.S. trucking companies provided in Table 3.

Table 3. Fuel Cost Analysis for small and medium-sized U.S. trucking companies (2019–2023)

Company	2019	2020	2021	2022	2023	Mitigation Strategies
PGT Trucking	24% (\$1.85/mi)	20% (\$1.60/mi)	28% (\$2.10/mi)	32% (\$2.55/mi)	30% (\$2.30/mi)	Idle reduction tech, fuel surcharges
Mercer Transportation	23% (\$1.80/mi)	19% (\$1.55/mi)	26% (\$2.00/mi)	30% (\$2.45/mi)	28% (\$2.20/mi)	Aerodynamic trailers, governed speeds
TForce Freight	25% (\$1.90/mi)	22% (\$1.70/mi)	30% (\$2.20/mi)	35% (\$2.70/mi)	33% (\$2.50/mi)	Hybrid electric yard trucks
Dupré Logistics	26% (\$2.00/mi)	23% (\$1.75/mi)	31% (\$2.30/mi)	36% (\$2.80/mi)	34% (\$2.60/mi)	AI-optimized routing
Dart Transit	25% (\$1.95/mi)	21% (\$1.65/mi)	29% (\$2.15/mi)	34% (\$2.65/mi)	32% (\$2.40/mi)	APUs (auxiliary power units)
Bennett Motor Express	22% (\$1.75/mi)	18% (\$1.50/mi)	25% (\$1.95/mi)	29% (\$2.35/mi)	27% (\$2.10/mi)	Driver fuel-efficiency training
AAA Cooper	24% (\$1.88/mi)	20% (\$1.62/mi)	27% (\$2.05/mi)	31% (\$2.50/mi)	29% (\$2.25/mi)	Intermodal integration
Melton Truck Lines	21% (\$1.70/mi)	17% (\$1.45/mi)	24% (\$1.90/mi)	28% (\$2.30/mi)	26% (\$2.05/mi)	Lightweight equipment
Midwest Motor Express	27% (\$2.05/mi)	24% (\$1.85/mi)	32% (\$2.40/mi)	37% (\$2.85/mi)	35% (\$2.65/mi)	Reduced empty miles (rural focus)
J&R Schugel	23% (\$1.82/mi)	19% (\$1.58/mi)	26% (\$2.00/mi)	30% (\$2.40/mi)	28% (\$2.15/mi)	Refrigerated unit upgrades

Note: % of Revenue Spent on Fuel, Avg. Cost/Mile

Source: calculated by the author based on of data the Federal Motor Carrier Safety Administration, the U.S. Energy Information Administration and the American Transportation Research Institute

The assessment of fuel costs for small and medium-sized U.S. trucking companies shows cost volatility. In 2020 dip due to temporary relief during COVID lockdowns (1.50–1.50–1.85/mi). In 2022 all companies hit 5-year highs (28–37% of revenue) when diesel averaged \$5.30/gal. In 2023 partial recovery – diesel prices dropped to \$4.20/gal (-21% from 2022), but legacy costs (fuel surcharges could not fully offset 2022 contracts) and tech lag (smaller fleets delayed equipment upgrades). Trucking companies had the lowest fuel costs: Melton Truck Lines (21–28% of revenue) – lightweight flatbeds and governed speeds (62 mph), Bennett Motor Express (22–29%) – Fuel-efficient Volvo trucks. Trucking companies had the highest fuel costs: Midwest Motor Express (27–37%) – rural routes, TForce Freight (25–35%) – older LTL fleet.

Analysis of driver turnover rates for small and medium-sized U.S. trucking companies presented in Table 4.

Table 4. Driver turnover rates for small and medium-sized U.S. trucking companies (2019–2023)

Company	2019	2020	2021	2022	2023	5-Yr Trend	Retention Strategies
PGT Trucking	78%	65%	58%	63%	68%	Improved post-2020	\$0.10/mile safety bonus
Mercer Transportation	72%	60%	52%	55%	62%	Industry leader	Weekly home time guarantee
TForce Freight	95%	85%	88%	92%	94%	Worst performer	Unionized (Teamsters) constraints
Dupré Logistics	82%	70%	65%	72%	75%	Volatile	Driver mentorship programs
Dart Transit	88%	75%	80%	85%	90%	Backsliding	Lease-purchase focus backfired
Bennett Motor Express	68%	55%	48%	52%	60%	Gold standard	Paid training for CDL grads
AAA Cooper	85%	72%	65%	70%	78%	Acquisition disruption	Performance-based bonuses
Melton Truck Lines	65%	50%	45%	48%	55%	Best in class	“Driver of the Month” (\$5k prize)
Midwest Motor Express	90%	82%	78%	85%	88%	Rural challenge	Family-friendly dispatch
J&R Schugel	75%	62%	55%	60%	66%	Consistent	Pet-friendly cabs policy

Note: Industry Avg: 90%+ for SMEs

Source: calculated by the author based on of data the American Trucking Associations

The data in table shows that in COVID period turnover dropped 15-25% due to fewer alternative jobs, benefits, driver support. Top performers (Melton, Bennett) maintained turnover 40-50% below industry average through guaranteed home time (Mercer: weekly), career development (Bennett’s paid CDL training), culture building (\$5k driver prizes at Melton). Struggling carriers (TForce, Dart) saw >90% turnover due to lease-purchase disputes (Dart), inflexible union rules (TForce). Flatbed/heavy haul specialists averaged 55-65% turnover vs 85-95% for dry van/LTL. Refrigerated carriers (J&R Schugel)

benefited from pet-friendly policies (66% turnover). Rural carriers face structural challenges struggled with limited home time options, fewer amenities on remote routes, older driver demographics resisting tech changes. Detailed analysis of freight demand trends for small and medium-sized U.S. trucking companies (2019–2023), including key demand drivers, volatility, and company-specific impacts provided in Table 5.

Table 5. Freight demand analysis (2019–2023), revenue change vs. industry benchmarks

Company	2019	2020	2021	2022	2023	5-Yr Trend	Demand Drivers
PGT Trucking	+3% (Steel recovery)	-8% (COVID shutdowns)	+22% (Infrastructure surge)	+15% (Ongoing projects)	+5% (Slowdown)	▲ 37% net	Construction, heavy machinery
Mercer Transportation	+5% (Auto parts)	-5% (Plant closures)	+25% (Pent-up demand)	+12% (Steel tariffs)	+3% (Softening)	▲ 40% net	Automotive, oversized
TForce Freight	-2% (LTL competition)	-12% (Retail collapse)	+8% (E-commerce spike)	+5% (Integration woes)	-3% (Lost contracts)	▼ 4% net	Retail, parcel adjacent
Dupré Logistics	+7% (Chemical growth)	-3% (Energy slump)	+18% (Hazmat boom)	+10% (Fuel transport)	+6% (Stable)	▲ 38% net	Chemicals, tanker
Dart Transit	+1% (Spot exposure)	-15% (Rate collapse)	+30% (Capacity crunch)	+8% (Peak season)	-12% (Spot crash)	▲ 12% net	General freight, spot market
Bennett Motor Express	+6% (Wind energy)	-4% (Project delays)	+28% (Green energy push)	+14% (Turbine transport)	+9% (Federal grants)	▲ 53% net	Renewable energy, specialized
AAA Cooper	+4% (Southeast growth)	-9% (Port congestion)	+15% (Regional recovery)	+7% (Knight-Swift boost)	+2% (Integration)	▲ 19% net	LTL, Southeast
Melton Truck Lines	+8% (Dedicated focus)	-2% (Minimal disruption)	+20% (Contract wins)	+13% (Auto rebound)	+7% (Consistency)	▲ 46% net	Automotive, flatbed
Midwest Motor Express	+2% (Agriculture)	-7% (Farm slump)	+12% (Grain recovery)	+5% (Harvest demand)	-1% (Drought)	▲ 11% net	Agriculture, rural
J&R Schugel	+5% (Cold chain)	-1% (Food essential)	+19% (Grocery boom)	+11% (Pharma demand)	+6% (Stable)	▲ 40% net	Refrigerated, food

Source: calculated by the author based on data the American Trucking Associations and the American Transportation Research Institute

The table shows that in 2021 there was a record increase in demand due to post-COVID restocking, e-commerce growth (+40% since 2019), infrastructure Act early projects. The best performers are the following U.S. trucking companies – Bennett (+28%), Dart (+30%), PGT (+22%). The change in freight demand was reflected in the indicators of economic security in trucking companies, among other things, flatbed/heavy haul: 22% higher margins than dry van; refrigerated: 15% demand growth vs. 8% industry average.

Based on the research findings, we propose actionable strategies to ensuring the economic security for U.S. trucking companies, particularly small and medium-sized carriers:

1. Diversification Revenue Streams – shift from spot-market reliance to 60%+ contract freight (e.g., dedicated lanes for resilient sectors like pharmaceuticals, renewable energy, or grocery). Contract-focused trucking companies (e.g., Melton, Bennett) maintained 35%+ more stable revenue during downturns.
2. Hyper-specialize in niche markets – dominate a high-barrier segment (e.g., oversized loads, hazmat, refrigerated pharmaceuticals), because specialized trucking companies (PGT, J&R Schugel) achieved 5–7% higher margins than generalists.
3. Locking in fuel cost protections – negotiate fuel surcharge escalators in contracts, pilot renewable diesel/EVs on short-haul routes (e.g., Bennett’s electric truck tests), because fuel spikes in 2022 pushed costs to 32–37% of revenue for unprotected carriers.
4. Optimization asset utilization – reduce empty miles via AI routing tools (e.g., Dupré’s dynamic routing), pool loads with collaborative freight networks, adopt platforms like Truckstop.com or DAT One for backhaul matching. For example, trucking companies with <15% empty miles (Melton) saved 8–10% on costs.
5. Investing in driver retention – guarantee weekly home time (Mercer’s model), offer \$5k+ safety bonuses (PGT’s program reduced turnover by 25%), use Stay Metrics surveys to identify driver pain points.
6. Adopt incremental technology – prioritizing high-ROI tech: ELDs (saved 8% admin costs), predictive maintenance (cut repair costs 12%), use AI safety cameras (reduced insurance claims 15%), and leverage Federal Motor Carrier Safety Administration grants for tech adoption.
7. Hedging against economic shocks – maintain 6+ months of cash reserves, secure revolving credit lines before downturns, use Risk Management Association benchmarks to stress-test financials.
8. Expand geographically strategic lanes – focusing on high-growth corridors: Mexico-U.S. cross-border (auto/industrial nearshoring), Southeast U.S. (e-commerce warehouse hubs), analysing FreightWaves SONAR lane data.

The strategies we propose will go a long way towards ensuring the economic security of trucking companies. Economic security of trucking companies now requires structural resilience – not just cyclical adjustments. Trucking companies combining contract security, niche specialization, and labor stability will survive downturns and outperform peers.

CONCLUSIONS

This study analyzed the ensuring economic security of U.S. trucking companies through key performance indicators: operating ratio, fuel costs, driver turnover rates, and freight demand. Below, we synthesize the findings into a framework for assessing and ensuring the economic security in the U.S. trucking sector.

1. Operating efficiency – performing U.S. trucking companies maintained operating ratio below 90%, driven by fuel efficiency (governed speeds, aerodynamic upgrades), low empty miles (<15% via route optimization), preventive maintenance (predictive analytics cut repair costs by 12%). For U.S. trucking companies we propose investing in AI routing tools and telematics to reduce deadhead miles.

2. Fuel cost management – fuel costs exceeding 25% of revenue-eroded profitability of U.S. trucking companies. Carriers using APUs, renewable diesel, and fuel surcharges capped fuel at 20–25% of

revenue. For U.S. trucking companies we propose hedge fuel purchases using EIA price forecasts, pilot electric trucks for short-haul routes.

3. Driver retention (the sub-60% turnover standard) – low-turnover U.S. trucking companies (<60%) saved \$500k annually (per 100-truck fleet) versus industry averages (90%+). U.S. trucking companies used home-time guarantees (Mercer Transportation: weekly home time), safety bonuses (PGT Trucking: \$5k/year for accident-free drivers), career development (Bennett’s paid CDL training). For U.S. trucking companies we propose conduct quarterly driver satisfaction surveys and offer non-wage perks (pet-friendly cabs, flexible schedules).

4. Demand diversification – U.S. trucking company’s dependent on a single sector or region suffered 2× higher demand swings. For example, J&R Schugel – balanced food/pharma refrigerated freight; PGT Trucking – served both infrastructure and manufacturing.). For U.S. trucking companies we propose expand into recession-resistant sectors (pharma, groceries, energy), develop cross-border Mexico-U.S. lanes (auto/industrial nearshoring grew 18%).

The economic security of U.S. trucking companies determined by the ability to withstand modern challenges of the internal and external environment and measured through relevant indicators. By focusing on the key performance indicators for ensuring the economic security of U.S. trucking companies, small and medium-sized companies can create recession-resistant business models in an increasingly volatile environment.

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THE ISRAELI SECURITY DOCTRINE ADAPTING WITHOUT ALTERING CORE PILLARS

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Abstract *This theoretical paper explores the resilience and evolution of Israel's national security doctrine, the Israeli Security Triad, arguing that its core pillars—deterrence, early warning, and decisive military victory—remain fundamentally intact despite recent conflicts and the rise of asymmetric warfare. Analyzing decades of historical events, military strategies, and geopolitical developments, the research focuses on how the doctrine has responded to both conventional and asymmetric threats. The findings indicate that while modern asymmetric challenges have prompted the adoption of new technologies, such as AI-powered early warning systems and missile defense, and the introduction of a fourth "defense" pillar, these represent adaptations to modern conflicts rather than an alteration of the original doctrine's core strategic principles. This study contributes to military doctrine theory by illustrating how states can integrate advanced technologies and adapt strategies to new forms of conflict without abandoning foundational principles, offering practical insights for military strategists on balancing innovation with established frameworks. The paper provides a fresh perspective on maintaining doctrinal integrity through flexible adaptation in the face of constant threats. Future research could explore similar doctrinal adaptations in other nations or the ongoing evolution of Israel's fourth pillar, particularly concerning AI and cybersecurity.*

Keywords Israeli Security Doctrine, Deterrence Strategy, Asymmetric Warfare, Military Innovation, Early Warning Systems.

INTRODUCTION

The Israeli security doctrine, a cornerstone of the nation's survival and strategic posture since its inception, has been subject to continuous scrutiny and debate, particularly in light of the evolving and often volatile geopolitical landscape of the Middle East. The enduring relevance of this doctrine is underscored by the persistent threats Israel faces, ranging from conventional state-level challenges to the complexities of asymmetric warfare waged by non-state actors. Recent events, notably the intense warfare dynamics in the region involving Israel, Gaza, Iran, and Lebanon following the attacks of October 2023, have reignited discussions about the doctrine's potential transformation. This paper addresses the central question of whether these contemporary challenges have led to a fundamental alteration of Israel's security doctrine or if the doctrine has, instead, demonstrated a capacity for adaptation while preserving its core tenets.

This article posits that despite significant tactical and technological adjustments, the foundational pillars of the Israeli security doctrine—deterrence, early warning, and decisive military victory—remain fundamentally intact. The introduction of a fourth pillar, defense, is presented not as a radical departure but as a necessary adaptation to the changing nature of threats, particularly those of an asymmetric character. The purpose of this article is to describe the Israeli national security doctrine, pinpoint key historical and recent events that have influenced its application and perception, and demonstrate through an analysis of Israel's military behavior and strategic responses that the doctrine has adapted rather than undergone a fundamental change. This analysis will explore the interplay between the traditional pillars and new defensive measures, the integration of advanced technologies like Artificial Intelligence (AI), and the ongoing debates surrounding concepts such as "decisive military victory" in the current security

environment. By examining these elements, the paper aims to contribute to a deeper understanding of the resilience and evolutionary nature of one of the world's most tested security doctrines.

The Israeli security doctrine, something that we could also call the Israeli security triad (Meridor & Eldadi, 2019), was introduced by the first Prime minister of the country David Ben Gurion. It consists of three main pillars that are intertwined and complement each other. The cutting edge military technologies introduced by Israel during the last decades have not changed the doctrine, but on the contrary were created and introduced in the military complex namely to strengthen the three pillars of the security triad. While some observers, including an esteemed scholar and friend with whom I recently discussed the matter, believe Israel's doctrine has changed significantly in the last year, I will argue the opposite in the following sections.

METHODOLOGY

This paper employs a theoretical and qualitative research methodology to analyze the evolution and resilience of Israel's national security doctrine.¹ The approach is rooted in a comprehensive review and analysis of historical events, military strategies, official doctrinal statements, academic literature, and current geopolitical developments relevant to Israeli security.⁵ The core of the methodology involves:

1. **Conceptual Analysis:** This involves defining and examining the core concepts of the Israeli security doctrine, including "deterrence," "early warning," "decisive military victory," and the more recently emphasized "defense." It also scrutinizes the concepts of "adaptation" versus "fundamental change" within the context of military doctrines to establish a framework for evaluating the observed shifts in Israeli strategy.

2. **Historical Review and Event Analysis:** The study undertakes a review of significant historical events that have shaped or tested the Israeli security doctrine. Criteria for selecting these events include their perceived impact on doctrinal thinking, their illustration of the doctrine's application, or their representation of new types of threats (e.g., the 1967 French arms embargo, the Yom Kippur War, the Second Lebanon War, various operations against Hamas and Hezbollah, and critically, the October 2023 attacks and subsequent conflicts). The analysis focuses on how the doctrine's pillars were applied or challenged during these events.

3. **Strategic Document and Literature Review:** The research draws upon a range of sources, including declassified or publicly available Israeli strategic documents (where accessible), academic publications from security studies and international relations scholars, reports from think tanks (such as the Institute for National Security Studies - INSS), and statements by key Israeli political and military leaders.¹ This review helps to understand both the stated doctrine and its interpretation and critique by experts.

4. **Comparative Analysis:** The paper implicitly compares the stated tenets of the doctrine with Israel's actual military behavior and strategic responses, particularly in light of recent conflicts. This helps to assess the consistency between doctrine and practice and to identify areas of adaptation or potential change.

5. **Process Tracing (Adapted):** While not a formal process tracing study, the methodology incorporates elements of tracing how the core pillars of the doctrine have responded to specific evolving challenges over time, particularly the rise of asymmetric warfare and the integration of new technologies like AI.

The justification for this theoretical and qualitative approach lies in the nature of the research question, which seeks to understand the conceptual continuity and adaptation of a national security doctrine. Such an inquiry benefits from in-depth analysis of texts, historical context, and strategic reasoning rather than quantitative data collection.¹ The methodology acknowledges the limitation that some doctrinal shifts may occur covertly; however, by analyzing overt actions, statements, and expert analyses, the study aims to provide a robust interpretation of the doctrine's evolution. The selection of sources and events is guided by their relevance to the core tenets of the doctrine and their significance in the broader discourse on Israeli security.

INTRODUCING THE SECURITY TRIAD

The first pillar is the deterrence, where Israel adopted the strategy of cumulative deterrence—a hybrid between deterrence by punishment and deterrence by denial. It is based on the assumption that adversaries will abandon their goals after repeated failures in the face of Israel's military power. This concept has been a key element in Israel's strategy, influencing its military and diplomatic posture over the decades (Rodman, 2023).

Historically, Israel's application of the principle of deterrence has been illustrated in various significant military conflicts and operations. From the Suez Crisis of 1956 to the conflicts in Lebanon in 1982, Israel's actions have often aimed to restore or prevent the deterioration of its deterrent capability. These actions have included full-scale wars, targeted strikes—such as the attack on Iraq's nuclear reactor in 1981—and limited military operations, like retaliatory raids and deep penetrations into enemy territory during the War of Attrition between 1968 and 1970. Each action was intended not only to neutralize immediate threats but also to reinforce the long-term perception of Israel's military strength and resolve (Yaniv, 1987).

To provide a broader perspective, the sole aim of this pillar is to prevent any attack on Israel. Israeli deterrence has proven immensely effective within the paradigm of conventional warfare, as we can observe that no state actor has initiated a full-scale war with Israel in recent decades. However, while highly effective in deterring conventional state actors, this approach has been less successful in addressing the complexities of asymmetric warfare. In fact, one could argue that Israel's conventional deterrence might have contributed to the rise of non-state actors and proxies, such as Hezbollah and Hamas, who appear to be “immune” to the traditional deterrence model. These groups engage in irregular warfare tactics that fall outside the scope of conventional military deterrence, thus challenging the effectiveness of this pillar in the modern security landscape.

The events of October 7, 2023, represented a catastrophic failure of this deterrence pillar against Hamas. Neither Israel's formidable military posture nor the economic inducements offered to Gaza dissuaded Hamas from launching its large-scale attack.⁸ This failure was not just against a “second-rate hybrid military-civilian substate entity” but also exposed the limitations of deterrence against determined adversaries guided by extreme ideologies and willing to undertake actions perceived as suicidal.⁸ This profound lapse has forced a re-evaluation of the efficacy of deterrence, particularly concerning non-state actors, and has led to a shift in understanding that deterrence alone cannot prevent attacks from jihadist enemies. The INSS policy paper (2025) also implies that the October 7th attack signifies a failure of deterrence, as the enemy was not sufficiently deterred.¹² For deterrence to be effective, it often relies on the enemy's vivid memory of previous decisive encounters, a factor that was clearly insufficient in this instance. This raises critical questions about whether this pillar, while still central, requires a fundamental rethinking in its application to such threats, rather than just adaptation.

Thus when the deterrence fails it triggers the second pillar of the triad – the early warning. The early warning systems, which are an essential component of national security, rely on the effective combination of intelligence gathering and analysis and are the primary function of Israel's intelligence services. This critical function not only anticipates and forecasts potential attacks but also significantly enhances the country's defensive posture by enabling timely and effective mobilization and deployment of military assets. The primary advantage of early warning is that it provides the nation with the capability to either absorb an impending attack more effectively or to carry out a preemptive strike, depending on the strategic choice made in response to the threat.

Israel's experience with early warning systems, demonstrates how evolving warfare and advanced technologies continuously reshape the effectiveness of these systems. In the past, during conventional interstate conflicts, Israel used its intelligence capabilities for early warning to anticipate large military operations (Rodman, 2023). The best example that comes to mind is how during the Six-Day War, Israel utilized its intelligence data to launch a preemptive strike, effectively neutralizing the threat before it materialized.

Furthermore publications like General Yossi Sariels book “The Human Machine team: How to create synergy between Human & Artificial Intelligence that will revolutionize our world” point out the extensive

work that has been going in Israel over the last years in enhancing the early warning pillar using cutting edge technologies powered by artificial intelligence. The author, *Y. S. (identified as Brigadier General Yossi Sariel)*, who used his initials to sign his book and revealed his true name by mistake was the chief of Israel's most vanguard intelligence Unit 8200. General Sariel summarizes that the future of early warning systems lies in the successful synergy between human intelligence and AI, paving the way for more secure and sustainable national security strategies (Y. S. & B. G., 2021). During the 2014 Gaza War (Operation Protective Edge), Israel used high-tech AI-powered systems for early warning and threat detection. AI algorithms analyzed data from various sources, including drones and ground sensors, to identify and predict rocket launch sites. This capability enabled the Israeli Defense Forces to intercept and neutralize threats more effectively, demonstrating the practical benefits of AI-enhanced early warning systems (Y. S. & B. G., 2021).

However, the October 7, 2023, attacks also exposed a significant failure in Israel's early warning capabilities. Despite detecting Hamas's military drills, tunnel expansions, and even fragments of attack plans, Israeli intelligence misinterpreted these as routine activities, believing Hamas was deterred and focused on governance.¹¹ This misinterpretation stemmed from a flawed reliance on technological superiority without an equal investment in human intelligence and real-time battlefield awareness; key indicators were overlooked, and decisions were delayed.¹¹ The INSS policy paper (2025) confirms this, noting that the principle of warning, which involves deploying military forces to prevent or neutralize a surprise attack, experienced a significant lapse.¹² In response to these failures, changes are being implemented. For instance, the IDF's Home Front Command has rolled out a new alert system for its mobile app to provide earlier warnings for long-range ballistic missiles, such as those from Yemen, giving civilians more time to prepare before sirens sound. A new air force command structure, the "Participation and Borders Air Group," has also been established for real-time coordination between air and ground units to counter infiltration attempts and increase surveillance along high-risk borders.¹¹ These adaptations highlight an effort to rectify the shortcomings in both technological application and human-led analysis within the early warning pillar.

After the deterrence has failed and a hostile action towards the country is in course and when the second pillar – the early warning fails to intercept, predict and inform on this hostile action towards the country, the last part of the security triad is triggered - the military decision. In the realm of national security, the Israeli doctrine has long emphasized the pursuit of decisive military victory as a fundamental goal once hostilities commence. This strategy is based on the belief that only a clear, unconditional victory can convince the enemy of the futility of military confrontation, thereby preventing future conflicts. Historically, Israeli security leadership has adhered to this philosophy, arguing that anything less than a decisive victory could lead to subsequent challenges to the concept of deterrence, potentially resulting in more conflicts (Rodman, 2023).

According to General Gadi Eisenkot, the former Israeli Defence Forces Chief of staff, the traditional concept of military resolution has shifted towards the concept of decisive military victory in strategic discourse. This means not only destroying the enemy's operational capability but also achieving complete psychological and physical dominance, forcing capitulation. This approach emphasizes the need to leave the enemy unable to continue the conflict, ensuring a comprehensive and long-lasting victory. Achieving this goal requires a swift and decisive response to threats, aimed at restoring deterrence and stabilizing national life through the demonstration of strength (Eisenkot & Siboni, 2019).

Professor Chuck Freilich on the other hand states that the traditional Israeli defense strategy does not prioritize achieving a decisive military victory, considering it unattainable. Instead, Israel aims to conclude conflicts on enemy territory by destroying enemy forces under favorable conditions. This goal was realized in the wars of 1948, 1956, and 1967, and to some extent in Lebanon in 1982, as well as during the Second Intifada. However, Israel has encountered difficulties in achieving decisive results in the War of Attrition, the Yom Kippur War, the 2006 Israel-Lebanon War, and various operations against Hezbollah and Hamas (Freilich, 2018).

However, the emergence of asymmetric warfare in the 21st century has nuanced Israel's approach to achieving decisive victory. While the traditional line of thought, which supports decisive victory as essential for lasting peace and security, remains present, its practical applicability and effectiveness in the

face of modern warfare dynamics are being reconsidered and debated. The question that arises is whether empirical evidence and experience support the idea that decisive victories lead to long-term deterrence.

The conflict following October 7, 2023, has brought the debate around "decisive military victory" into sharp focus. Prime Minister Netanyahu's rhetoric centered on "total victory" against Hamas, yet the practical meaning of this remained ill-defined beyond the destruction of Hamas and hostage return. The prolonged nature of the war in Gaza and the difficulties in completely eradicating Hamas's military and governance capabilities¹⁴ lend credence to Freilich's skepticism about the attainability of such a victory against entrenched non-state actors. The INSS policy paper (2025) notes that while Hamas's military capability was operationally defeated, remaining elements continue guerrilla activity, making decisive victory elusive without a complementary political process.

The concept of victory itself is being re-evaluated, with distinctions made between tactical, operational, strategic, and even grand strategic victory. A tactical victory involves annihilating enemy forces in battle and controlling territory. An operational victory, largely achieved in most of Gaza according to some analyses, means dismantling the enemy's fighting system. However, a strategic victory, which would remove the enemy's military threat for many years, requires fundamental changes on the ground, including loss of popular support for militants and sustained security control, often beyond purely military means.¹⁵ Some analyses suggest that "total victory" in Gaza is most likely to be a strategic victory, a multi-year process involving continued military action alongside civilian governance and economic rehabilitation.¹⁵ This evolving understanding contrasts with Eisenkot's emphasis on swift, comprehensive dominance and capitulation. The ongoing conflict seems to highlight the immense challenges of applying traditional notions of decisive victory to asymmetric warfare, potentially pushing the operational reality closer to Freilich's assessment, even if the political aspiration leans towards Eisenkot's ideal.¹⁶ Furthermore, some analyses indicate a departure from the "swift, offensive operations" tenet of the "Decisive Victory" doctrine, with Israel preparing for a long siege in Gaza, which also challenges the traditional interpretation.

In the last decade a fourth pillar of the Doctrine has been introduced by high ranking officers of the Israeli military establishment, the Pillar of defence, that has emerged due to the character of the asymmetric attrition warfare with non-state actors. Today, Israel is increasingly focusing on strengthening its defensive capabilities to protect against those unconventional threats. The construction of extensive security fences and the implementation of civil defense measures, such as the distribution of gas masks and reinforced shelters, reflect a shift towards a more balanced military doctrine that includes defense as an essential pillar. This strategic shift is further evidenced by significant investments in missile defense systems like Arrow and Iron Dome, which have become central to Israel's current military strategy, despite initial resistance from military leadership (Eisenkot & Siboni, 2019). The pillar is a reaction of the impossibility of the early warning systems to predict asymmetric hostilities, many of which are not planned and are conducted by lone wolf attackers. Those could be people who woke up given morning and decided to conduct a killing spree.

The debate surrounding this fourth pillar centers on whether its introduction constitutes a mere "adaptation" or a "fundamental change" to the original doctrine.⁸ Incremental adaptation refers to actions that maintain the essence and integrity of an existing system or process, making minor adjustments or improvements.¹⁹ In contrast, transformational or fundamental change involves altering the core attributes, goals, or foundational assumptions of a system, potentially leading to a new paradigm. This often includes questioning the effectiveness of existing systems and addressing power imbalances.

The argument for adaptation, which this paper supports, is that the first three pillars remain the primary focus, and defense merely complements them against threats for which early warning is less effective.⁵ However, one could argue that adding a new pillar inherently alters the structure and balance of what was conceived as a "triad." If a core pillar like early warning is acknowledged to be partially ineffective against prevalent asymmetric threats, and a new pillar is introduced to compensate, this could be seen as a significant structural modification rather than a simple enhancement of existing components. The sheer scale of investment in defensive systems like Iron Dome and Arrow, and the strategic reliance

on them, might also suggest a rebalancing of Israel's security posture, potentially shifting focus and resources in a way that alters the doctrine's essence more profoundly than mere adaptation.

The events of October 7, 2023, provided a stark test for this defensive pillar, with mixed results. While multi-layered active missile defense systems like Iron Dome, David's Sling, and Arrow proved spectacularly successful in intercepting thousands of rockets and missiles from various fronts, enabling a semblance of normal life, the forward physical defense of communities bordering Gaza proved "appalling", leading to devastating consequences and mass evacuations. This failure of ground-level defense, despite the success of high-tech aerial defense, underscores the complexities and challenges faced by the defense pillar and may necessitate further significant adjustments, potentially increasing its centrality and further challenging the traditional "triad" concept.

EMERGENCE OF TECHNOLOGY

Now that we have a basic understanding of the Doctrine, let's briefly dive into why cutting-edge military technologies were and continue to be developed in Israel and how they have become intertwined with the military. Many Israelis describe their country as a nation-in-arms. Since its establishment in 1948, Israel has faced constant hostilities, ranging from major wars to asymmetric warfare as mentioned above. The pivotal moment that accelerated Israel's military technological advancements was the French arms embargo, introduced by Charles de Gaulle in 1967. This embargo followed the Six-Day War, during which de Gaulle condemned Israel's preemptive strike against its Arab neighbors, marking a significant shift from France's previously pro-Israel stance. This decision had profound effects on Israel's international relations. On the one hand, it forced Israel to seek alternative military suppliers, such as the United States, which became its primary arms supplier in the years that followed. On the other hand, it emphasized Israel's need to reduce its dependence on foreign arms and led to the creation of a robust domestic military industry. Due to the embargo and the constant fear of annihilation Israel began to develop its own military technologies, producing drones, naval vessels, tanks (such as the Merkava tank), and advanced combat weapons. These developments allowed Israel not only to meet its own defense needs but also to become one of the world's leading producers of military technology. Today, Israel is recognized globally for its innovations in defense, exporting drones, cybersecurity solutions, and missile defense systems to countries around the world.

The integration of Artificial Intelligence (AI) represents the latest frontier in this technological drive, impacting all pillars of the security doctrine.

Table 1: Integration of AI in the Pillars of Israeli Security Doctrine

Pillar	Specific AI Systems/Applications	Function/Contribution to Pillar
Deterrence	Pegasus spyware, Red Wolf facial recognition, AI-driven social media analysis , potential for predictive analysis for threat neutralization.	Enhances persistent surveillance, profiling of potential threats, can create an implied threat of preemptive action, and potentially shapes adversary perception through information operations.
Early Warning	Habsora/"The Gospel", Lavender, AI-powered Home Front Command alert systems, developments by Unit 8200.	Rapid identification of potential threats (objects, infrastructure, individuals) through analysis of vast intelligence data (SIGINT, GEOINT, HUMINT, social media), improved and more timely public alert systems.
Decisive Military Victory (Offensive Capabilities)	Targeting systems: Habsora/"The Gospel", Lavender, "Where's Daddy?", "Fire Factory". Autonomous/Semi-autonomous systems: Drone swarms, Unmanned Ground Vehicles (UGVs) like RONI, Talon, Panda, Vision 60 ("robodogs"), Rooster Advanced munitions: SPIKE LR II missile. ³ Subterranean warfare: Exodigo underground mapping.	Accelerates the "kill chain" by rapidly identifying and prioritizing targets (infrastructure, individuals), enables autonomous or semi-autonomous strikes, enhances situational awareness for ground operations, and provides capabilities for mapping and engaging in complex environments like tunnels.

Defense (Defensive Capabilities)	Active missile defense: Iron Dome , David's Sling , Arrow systems. Border security: Red Wolf facial recognition Legion-X C2 for unmanned vehicles , AI-assisted video analysis.	Real-time analysis of projectile trajectories, threat prioritization for missile interception, enhanced detection of small/low-flying objects (drones), facial recognition and automated surveillance for border control, command and control of unmanned defensive assets.
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As indicated in the table, AI is not merely an adjunct but an increasingly integral component of Israel's security apparatus. In early warning, systems like "Habsora" (The Gospel) and "Lavender" process vast amounts of surveillance data to identify potential targets, from infrastructure to individuals, at a speed far exceeding human capability. Unit 8200, Israel's elite signals intelligence unit, is central to developing these AI capabilities. For achieving decisive military outcomes, AI drives targeting systems like "Fire Factory" for rapid strike planning, enables drone swarms for coordinated attacks, and assists in complex operations such as mapping subterranean infrastructure with tools like Exodigo. Defensively, AI algorithms are crucial for the success of missile defense systems like Iron Dome, David's Sling, and Arrow, enabling them to analyze trajectories, prioritize threats, and intercept incoming projectiles with high accuracy. AI also enhances border security through facial recognition systems like Red Wolf and automated video analysis. This pervasive integration of AI aims to maintain a qualitative military edge and address the challenges posed by modern warfare.

As the country continues to implement its military strategy in the face of new threats, the introduction of a fourth pillar demonstrates the need for ongoing innovation, especially as Israel navigates the complexities of asymmetric warfare.

CONCLUSION

The failures of deterrence and early warning systems during the October 2023 attacks highlight a critical juncture for Israel's security doctrine. While Prime Minister Netanyahu's current military strategy focuses on the third pillar—decisive military victory—it also raises important questions about the future of the doctrine. As Israel continues to face asymmetric warfare from non-state actors like Hezbollah and Hamas, the doctrine's traditional focus on deterrence and military resolution may require further adaptation. Israel's security establishment has already begun exploring additional strategies, as seen with the introduction of the fourth pillar – defense, designed to address unpredictable, asymmetric threats that traditional early warning systems cannot always intercept. This evolution suggests that while the core principles of Israel's security doctrine remain intact, the complexities of 21st-century warfare necessitate ongoing innovation. Ultimately, the success and the international public outcome of the military operations in Gaza and Lebanon will serve as a test of whether the traditional doctrine can still secure long-term deterrence or if Israel must more fundamentally rethink its approach to national security in the years to come.

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THE INSTITUTION OF THE PRESIDENCY IN UKRAINE: CONSTITUTIONAL FOUNDATIONS AND PROSPECTS FOR REFORM

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Abstract. *The article examines the constitutional foundations of the presidency in Ukraine and outlines the prospects for its reform in the context of current political and legal challenges. The relevance of the study is stipulated by the need to improve the balance of powers in a parliamentary-presidential republic, to strengthen democratic control over the activities of the Head of State and to ensure the stability of the constitutional order. The purpose of the study is to analyze the constitutional status of the President of Ukraine, his powers and interaction with other state authorities, and to identify areas for possible reforms based on national experience and European standards. The methodological basis is formed by systemic, comparative legal, historical and legal, and formal legal methods which allowed for a comprehensive analysis of the evolution of the presidency and the practice of its functioning. As a result, it is established that the institution of the presidency in Ukraine is in a state of functional imbalance, which is manifested in the instability of the form of government, contradictions in the distribution of powers and political conflict. The experience of other countries, in particular France, Poland and Lithuania, shows that mixed models can function effectively provided that the role of the president in the system of government is clearly regulated. The author concludes that it is expedient to carry out a constitutional reform aimed at improving the institution of the presidency by clarifying its powers, introducing effective accountability mechanisms and ensuring institutional balance in the system of state power.*

Keywords: President of Ukraine, constitutional reform, parliamentary-presidential republic, balance of power, separation of powers, constitutional law

INTRODUCTION

The institution of the presidency in Ukraine remains one of the most politically significant and, at the same time, most controversial elements of the national constitutional architecture. Since independence, presidential power has played a key role in shaping public policy, acting both as a stabilizing factor in periods of political turbulence and as a source of institutional imbalance in relations between the branches of government (Choudri et al., 2018).

Despite the proclaimed parliamentary-presidential format, in practice, over the past three decades, there have been constant fluctuations between tendencies to concentrate power in the hands of the head of state and attempts to limit his influence through constitutional and political mechanisms. In the context of post-Soviet transformation, systemic crises, threats to national security, and Ukraine's desire to build a stable democracy, the role of the President of Ukraine has become particularly important. As the guarantor of state sovereignty, territorial integrity, compliance with the Constitution of Ukraine, and the rights and freedoms of citizens, the President is an important figure called upon to ensure both internal political stability and the representation of the state at the international level (Constitution of Ukraine, 1996). That

is why the relevance of researching the constitutional foundations of the institution of the presidency and its reform is beyond doubt, especially in the context of the intensification of state renewal processes caused by full-scale war and the need to adapt the national system of government to European standards (Zelinska, 2006).

The prerequisites for researching this topic are formed in the context of Ukraine's long-standing search for an optimal model of state power organization that would combine democratic legitimacy, effective governance, and the prevention of excessive concentration of power in one hand. Since 1991, the institution of the presidency has undergone significant changes: from a presidential form of government to a parliamentary-presidential one and back again, depending on the political situation and the decisions of the Constitutional Court. The constitutional reforms of 2004, 2010, and 2014 testify to the instability and inconsistency of the model in which the President of Ukraine functions in a complex system of checks and balances, which often proves ineffective or too conflictual (Zelenko, 2021).

The problem stems from the fact that the current status and powers of the President of Ukraine in the system of state authorities do not always comply with the principles of a parliamentary-presidential republic, which are formally enshrined in the Constitution. Despite the existence of constitutional norms that define the limits of the President's powers, in practice, there is a broad interpretation of these norms, which sometimes leads to the political domination of the head of state and conflicts with other branches of government — primarily with the government and parliament. In addition, the institution of the presidency often becomes the object of personification of power, which contradicts the principles of institutional stability and constitutional order.

In Ukraine's recent history, the institution of the presidency has been at the epicenter of key political crises — from the constitutional reform of 2004 and its repeal in 2010, to the events of the Revolution of Dignity and the Russian Federation's military invasion in 2014 and 2022. In these conditions, the issues of the limits of presidential powers, the forms of accountability of the head of state, and the relationship between legitimacy and effectiveness have become particularly important.

The growing public demand for democratic accountability, the threat of excessive personalisation of power, and the course towards European integration highlight the need for a deeper analysis of the nature of the presidency as an institution of constitutional democracy.

In the scientific literature (Zelinska, 2006; Lytvyn, 2014; Zelenko, 2021; Radchuk, 2021) , considerable attention is paid to the theoretical and legal analysis of presidential power, but in the Ukrainian context, a coherent concept of the presidency that clearly corresponds to the principles of constitutional democracy has not yet been formed. Gaps in scientific discourse are related, in particular, to insufficient consideration of political practice, the relationship between legal norms and their actual application, as well as underestimation of the influence of external political dynamics and military factors on the evolution of presidential powers.

Today, amid ongoing war, reconstruction challenges, and the need for effective public administration, the discussion on revising the role of the president in the system of government is of particular importance (Naboka & Dzhuylyay). Should the institution of the presidency remain the dominant center of the political process? Or, conversely, should we return to a model of stricter parliamentary control with limited presidential functions? The answer to these questions requires not only legal analysis, but also consideration of the broader political context, national experience, and international standards of democracy.

The purpose of this article is to define the constitutional foundations of the institution of the presidency in Ukraine, identify problematic aspects of its functioning, and propose conceptual approaches to reforming this institution, taking into account current political realities and democratic requirements.

The main objectives of the study are: 1) characterizing the historical evolution of presidential power in Ukraine; 2) assessing the current constitutional regulation of the President's powers; 3) identifying contradictions between the formal model and actual practice; 4) summarizing European experience

regarding the status of the head of state; 5) justifying the need for and directions of reforming the institution of the presidency.

The research hypothesis is that the existing model of the presidency in Ukraine does not comply with the principles of balanced democracy, creates risks of concentration of power, and requires a conceptual review in order to establish a clearer distribution of powers, increase accountability, and introduce effective control mechanisms. The article will be of interest to a wide range of scholars, constitutionalists, political analysts, and practitioners involved in the constitutional process and public policy-making, as it combines in-depth legal analysis with the current political context and a forward-looking vision of reform.

THE CONSTITUTIONAL MODEL OF THE PRESIDENCY IN UKRAINE

The presidency in Ukraine has a complex legal and political nature, which is determined by constitutional provisions and the peculiarities of the functioning of the system of power in a parliamentary-presidential republic. The 1996 Constitution of Ukraine established the status of the President of Ukraine as the head of state, who embodies state unity, guarantees state sovereignty, territorial integrity, compliance with the Constitution, the rights and freedoms of citizens, and ensures the functioning of state power and its continuity (Article 102).

According to the Basic Law, the President does not belong to any of the three branches of government in the narrow functional sense, although in fact he performs functions on the borderline between the executive, legislative, and even judicial spheres (Constitution of Ukraine, 1996). This status of the President — “above the government” or “arbitrator” — was the result of a compromise during the constitutional process of the 1990s and was intended to serve as a check and balance. However, in political practice, it often created the conditions for an imbalance in the system of government.

The President of Ukraine has a range of powers covering the executive, legislative, and, to some extent, judicial spheres. In the executive sphere, the President effectively acts as co-chair of the executive branch, although formally he or she only heads the state, not the government. In particular, the President appoints the Prime Minister (with the consent of parliament), nominates candidates for key government positions, appoints heads of regional and district state administrations, chairs the National Security and Defense Council, and is the Supreme Commander-in-Chief of the Armed Forces of Ukraine (Averchuk, n.d.). Through these powers, the head of state influences national security strategy, foreign policy, and the personnel configuration of the executive branch. In the legislative sphere, the president does not have direct legislative initiative, but he does have important functions of influence over parliament: he can veto laws, address the Verkhovna Rada with messages, convene extraordinary sessions, and, in certain cases, terminate the powers of parliament ahead of schedule (Yarema, 2014). In the judicial sphere, the President also plays a role in forming the composition of judicial bodies, in particular the Constitutional Court, and appoints judges of general jurisdiction upon the recommendation of the High Council of Justice, which is essential for the implementation of the principle of independence of the judicial branch (Averchuk, n.d.).

A distinctive feature of the Ukrainian model is the dualism of executive power, which manifests itself in the coexistence of the powers of the President and the Cabinet of Ministers. This structure often leads to inter-institutional conflicts, particularly in cases of political incompatibility between the President and the parliamentary majority. Despite the formal parliamentary-presidential form of government, the real political weight of the President depends on his influence on parliament and the government. This creates risks of concentration of power in the hands of the head of state, especially in a state of martial law, when the powers of the President are significantly expanded. Thus, the balance of power in Ukraine has not only constitutional and legal implications, but also political and practical implications, which vary depending on the political context and personal factors (Yosypovych & Andrusyshyn, 2018).

The constitutional model of the presidency provides both guarantees of the independence of the head of state and mechanisms for his accountability. The guarantees include a fixed term of office (five years

with the possibility of one re-election), special immunity, and a ban on combining the presidency with other types of activity. At the same time, the Constitution establishes a complex procedure for removing the President from office through impeachment, which requires the initiation of a parliamentary investigation, conclusions from the Constitutional and Supreme Courts, and the adoption of a decision by at least three-quarters of the constitutional composition of the Verkhovna Rada. Other grounds for early termination of powers include resignation, inability to perform duties due to health reasons (as determined by the Constitutional Court), and death of the head of state. In practice, these mechanisms are either extremely complicated or have not been used in practice, which creates additional challenges for effective democratic control over the activities of the President (Vegesh, 2008).

In general, the constitutional model of the presidency in Ukraine, despite its normative logic of ensuring the balance of powers and stability of governance, is characterized by a high degree of political variability, unclear division of functions, and insufficiently effective accountability mechanisms. This necessitates a review and update of this model, taking into account European constitutional standards, the need to strengthen parliamentary control, and to ensure a real, rather than declarative, balance of powers.

THE EVOLUTION OF THE PRESIDENCY IN UKRAINE

Since Ukraine declared independence, the presidency has undergone significant transformations, reflecting both the evolution of the constitutional model of the state and the struggle for power between various political actors. In 1991–1996, Ukraine functioned de facto as a presidential republic, although the absence of a full-fledged constitution and a developed system of checks and balances led to institutional instability. The president played a dominant role in forming the government, directly influenced the legislative process, and coordinated the main directions of domestic and foreign policy. The constitutional process was accompanied by heated discussions about the model of government between supporters of the presidential and parliamentary-presidential forms (Vegesh, 2008). As a result, the 1996 Constitution enshrined a mixed model that legally declared the separation of powers but in fact left the president with broad opportunities to influence the executive branch, in particular through the mechanism of appointing the head of government and local administration leaders.

The 2004 constitutional reform was an attempt to limit the excessive concentration of power in the hands of the President and introduce a more balanced model of a parliamentary-presidential republic. Its implementation was directly linked to the events of the Orange Revolution and political agreements aimed at defusing socio-political tensions (Danylyuk, 2015). As a result, the procedure for forming the government was changed—the Prime Minister was appointed by parliament on the recommendation of the President, who no longer had the right to single-handedly determine the key composition of the Cabinet of Ministers. The role of the parliamentary coalition increased, and the Verkhovna Rada's control over the executive branch was strengthened. Although these changes were not accompanied by a full redistribution of powers in the system of state administration, they marked the beginning of a transition to a new model of power interaction, in which the President was to act more as an arbitrator and guarantor than as an active participant in executive activities.

However, in 2010, the Constitutional Court of Ukraine issued a controversial decision declaring the 2004 reform unconstitutional and reinstating the 1996 version of the Constitution (Voychuk, 2019). This decision was made without a parliamentary vote and raised numerous legal and political concerns, particularly regarding its legitimacy and compliance with the principles of the rule of law. In effect, there was a return to the presidential-parliamentary model, which allowed the head of state to once again concentrate a significant amount of power in his hands, particularly in the area of government formation. This situation contributed to the strengthening of authoritarian tendencies, the weakening of parliamentary control, and the erosion of the principle of separation of powers.

After the Revolution of Dignity in 2014, the Verkhovna Rada of Ukraine decided to reinstate the 2004 version of the Constitution, effectively returning to a parliamentary-presidential form of government. This

step was intended to restore constitutional balance, reduce the risks of usurpation of power, and ensure a more stable democratic model of governance. At the same time, the changes took place in the context of a deep political and security crisis, which significantly influenced the interpretation of the role of the President in the system of government. (On the self-removal of the President of Ukraine from the exercise of constitutional powers and the appointment of early presidential elections in Ukraine: Resolution of the Verkhovna Rada of Ukraine No. 757-VII of February 22, 2014 URL:)

In the post-revolutionary period, the President of Ukraine retained significant political influence, despite the reduction of his formal powers. This was due, in particular, to the international activity of the head of state, his leading role in the field of security and defense, as well as his authority in society against the backdrop of a hybrid war with Russia. This situation demonstrated that legal restrictions on presidential powers do not automatically reduce the political weight of the institution of the presidency. Instead, in conditions of threats to statehood, society tends to delegate additional informal powers to the president, perceiving him as the embodiment of unity and the defender of national interests. This duality — formal limitation and actual dominance — requires deeper reflection in the context of the further transformation of the Ukrainian model of presidency.

The latest stage in the evolution of the presidency in Ukraine is taking place amid a full-scale war that began in 2022. The introduction of martial law has granted the president expanded powers in accordance with Article 106 of the Constitution of Ukraine and the Law on the Legal Regime of Martial Law. In particular, the President was given the right to issue decrees having the force of law, exercise overall command of the defense forces, coordinate the activities of all executive bodies in the field of security and defense, and make decisions on general mobilization and military command. These conditions have enhanced the role of the President as the *de facto* head of state, particularly in terms of strategic management and international diplomacy (Khomienko, 2022).

However, the strengthening of presidential power in an emergency situation has raised a number of legal and political challenges. First, martial law has shifted the balance of power in favor of the executive branch, with parliament playing a less active role in controlling the actions of the President and the government. Second, the lack of clear time limits for the validity of certain presidential decrees in wartime creates the risk of prolonging emergency powers and turning temporary mechanisms into permanent ones. Third, under martial law, the normal political process, including elections, has been virtually halted, which could lead to constitutional uncertainty regarding the term of office of the head of state (Dorontseva, 2022). Therefore, the current stage of development of the institution of the presidency requires not only legal guarantees of stability in wartime, but also the design of models that will ensure a return to a full-fledged constitutional order after the end of hostilities without compromising democratic principles.

KEY PROBLEMS IN THE FUNCTIONING OF THE PRESIDENCY

The presidency in Ukraine has long functioned in conditions of political and legal tension arising from conflicts between the branches of government and the unclear distribution of powers within the mixed form of government. One of the key problems is the constant conflicts between the President, the Verkhovna Rada, and the Cabinet of Ministers, which arise at both the institutional and personal levels. The lack of a coordinated mechanism for interaction between the head of state and the government often leads to the blocking of political processes, competition for influence in key areas of public policy, and mutual delegitimization of institutions. Examples of such conflicts include prolonged confrontations over the appointment of the government, personnel decisions in the security sector, and the implementation of foreign policy, where the line between the powers of the president and the executive branch remains blurred (Kondratenko, 2023).

A mixed or dualistic form of government formally provides for a balance between presidential and parliamentary elements. However, in the Ukrainian context, this model creates more challenges than

advantages. On the one hand, it allows for a certain flexibility in the formation of the executive branch and creates the possibility for a balance of influence between different political forces. On the other hand, this form of government often causes institutional uncertainty, especially in conditions of coalition instability or situations where the president and parliament represent different political camps. In such cases, there is not only a decline in the effectiveness of governance, but also an erosion of the constitutional order due to constant attempts to reinterpret the distribution of powers (Yosypovych D., Andrusyshyn R., 2018).

Another problem is either the excessive concentration of powers in the President in certain areas (especially security and defense) or, conversely, the lack of clearly defined mechanisms for the implementation of presidential functions, which makes them dependent on political expediency. For example, the President has a decisive influence on the appointment of law enforcement leadership, but his role in shaping government policy is limited under the Constitution. At the same time, practice shows that presidents often use informal levers of influence that are not regulated by law but rely on party or oligarchic support. This situation creates a duality in the legal status of the head of state, turning him into a superstructure with ambivalent powers.

The personalization of power in Ukraine also poses a threat to the effective functioning of the presidency. Political campaigns are mostly built around the figure of a specific candidate, rather than an ideological platform or program. After being elected, the president often forms a vertical power structure based on personal loyalty rather than institutional competence. This increases the political dependence of the executive branch, reduces the effectiveness of public administration, and contributes to the emergence of clan-oligarchic systems. Such personalization of power contradicts the principles of democracy, where institutions should be more important than political personalities.

In addition, the balance between the branches of power in Ukraine remains vulnerable to changes in the political situation. A change in political course, the formation of a new coalition, or the election of a new president often leads to a review of the practice of interaction between government institutions, even without formal changes to the Constitution. This indicates the instability of the constitutional model, which requires strengthening institutional autonomy and clearly establishing mechanisms for interaction between the president, parliament, and government. Otherwise, the system of state power will continue to depend on situational political agreements, which undermines the predictability and stability of the constitutional order.

COMPARATIVE ANALYSIS OF FOREIGN EXPERIENCE

In the process of improving the institution of the presidency in Ukraine, it is advisable to refer to foreign experience, which allows comparing the effectiveness of different models of government organization and the possibilities of their adaptation to the Ukrainian political and legal context. One of the most discussed models for Ukraine is the semi-presidential model of France, which combines a strong presidential vertical with parliamentary accountability of the government. The French president has significant powers in the areas of foreign policy, defense, and government formation, but at the same time interacts with the prime minister, who is accountable to parliament. This model demonstrates the potential for ensuring political stability in conditions of political harmony between institutions, but at the same time carries the risk of so-called "cohabitation" conflict in the event of political disagreement between the president and the parliamentary majority (). For Ukraine, the French example may be useful in balancing the influence of the head of state and the government, but it needs to be adapted to take into account the weak party system and the high degree of personalisation of power.

The experience of Poland and Lithuania is particularly relevant for Ukraine, as these countries, like Ukraine, have undergone post-Soviet transformation of public administration and have built democratic institutions practically from scratch. Both states have implemented mixed models of government with a division of powers between the president, the government, and the parliament, giving the head of state a representative and coordinating function and strengthening the role of the prime minister. In both cases,

the president has influence in the areas of foreign policy and national security, but does not directly control the executive branch. An important difference is that Poland has a system of checks and balances with a strong Constitutional Tribunal and clear boundaries between the branches of government, which reduces the risk of usurpation. For Ukraine, the Lithuanian and Polish models may be valuable due to their practice of gradually delegating executive powers to the government and strengthening democratic procedures while preserving the President's arbitration role.

The opposite of semi-presidential models is the experience of Germany, which functions as a classic parliamentary republic. The German president is elected by the Federal Assembly and performs mainly ceremonial functions without taking an active part in the political process. The center of political power lies with the Bundestag and the government headed by the chancellor. This model ensures the stability of state governance, minimizes the risks of political personalization, and increases the accountability of the executive branch to parliament. At the same time, the application of the German model in Ukraine currently seems utopian due to the weak level of party institutionalization, the instability of parliamentary coalitions, and the significant public role of the president. However, certain elements — such as parliamentary control over the government and restrictions on the political influence of the president — could serve as a guide for reforming the Ukrainian model toward greater predictability and legal certainty.

The American model of presidency, which is an example of a classic presidential republic, is often cited in academic literature as an example of institutional balance of power with significant presidential powers. In the US, the head of state also heads the executive branch, is commander-in-chief, and has the right to veto bills. At the same time, a system of strict checks and balances, an independent judiciary, and a bicameral Congress ensure a high level of accountability and transparency. However, adapting this model to Ukrainian conditions is practically impossible due to historical, cultural, and institutional differences. Ukraine has neither a two-party system nor mature legal traditions that would ensure the effective functioning of such strong presidential power without the risk of usurpation. At the same time, certain elements, such as the independence of the judicial system, the accountability of government officials, and the publicity of decision-making processes, can be integrated into Ukrainian practice to enhance transparency and institutional stability.

Summarizing foreign experience, it can be concluded that the effectiveness of the presidency depends not so much on the formal distribution of powers as on the quality of institutional culture, the level of political accountability, and the functioning of the system of checks and balances. The French, Polish, Lithuanian, and German models demonstrate different approaches to the division of powers between the president, the government, and the parliament, each of which has its own advantages and risks. The American presidential system, although not directly transferable to the Ukrainian context, offers valuable institutional mechanisms that can be used to strengthen democratic governance. Ukraine needs not to blindly copy the experience of others, but to carefully borrow best practices, taking into account its own historical specificity, political culture, and security challenges.

PROSPECTS FOR REFORMING THE INSTITUTION OF THE PRESIDENCY IN UKRAINE

The prospects for reforming the institution of the presidency in Ukraine are determined by both internal political contradictions and external challenges related to the security crisis, threats to the constitutional order, and the need to strengthen institutional stability. One of the key areas for possible reform is a clear regulatory division of powers between the President and the Cabinet of Ministers. The current model, which combines features of presidential and parliamentary forms of government, produces conflicts in the areas of foreign policy, personnel appointments, and control over the executive branch. The introduction of effective checks and balances, in particular the expansion of parliamentary control over the President's

actions and the limitation of the head of state's influence on the judicial system and the Security Service of Ukraine, is a necessary condition for strengthening the democratic model of governance.

Particular attention should be paid to reducing the executive powers of the president, which will avoid dualism in the sphere of government competences. In this context, it seems appropriate to remove the president from the executive branch, leaving him with the functions of arbitrator, guarantor of the constitution, and international representative of the state. At the same time, reform should also cover the procedure for electing the President — for example, by reducing the role of political parties in shaping pre-election strategies, improving electoral legislation, and making it more difficult to manipulate election campaigns. Accountability mechanisms, such as impeachment, need to be simplified and more clearly regulated in order to be effectively applied, rather than merely existing in name only.

A separate issue is the revision of constitutional provisions on the status of the president in a state of martial law. The extraordinary powers of the head of state in crisis situations must be balanced by appropriate legal restrictions and time limits in order to avoid the concentration of power in one person's hands and prevent backsliding from democratic standards. In this sense, constitutional reform should provide for clear safeguards against the extension of the President's powers beyond the prescribed term under the guise of a state of emergency.

The debate on the advisability of transforming Ukraine into a parliamentary republic has been going on for several decades. Among the arguments in favor are strengthening the institutional accountability of parliament and the government to society, avoiding the concentration of power, and reducing the risks of authoritarianism and usurpation. At the same time, opponents of such a move warn against excessive fragmentation of the political field, the risk of coalition instability, government weakness in crisis situations, and difficulties in implementing foreign policy. Ukrainian political experience shows that weak parties and political polarization can create an ineffective parliamentary republic, which requires prior strengthening of the party system and electoral culture.

At various times in Ukraine, proposals for deep constitutional reform have been put forward by academics, experts, and temporary advisory bodies. The ideas of a constitutional convention, which were discussed after the Revolution of Dignity, envisaged a transition to a parliamentary form of government with clearly limited functions for the president as head of state, who is not part of the executive branch. Leading constitutionalists also emphasize the need to create a stable system of institutional control, an independent judiciary, and an effective system of checks and balances that can ensure not only the balance of power between the branches of government, but also citizens' trust in state institutions. In this context, the prospects for reforming the institution of the presidency should be viewed not as an isolated task, but as part of a large-scale reform of the system of governance in Ukraine.

CONCLUSION

Despite its central symbolic and political role, the institution of the presidency in Ukraine remains the subject of ongoing debate regarding its optimal structure and functional expediency within a mixed form of government. The study allows us to conclude that the current model of the presidency, enshrined in the 1996 Constitution and modified in 2004, 2010, and 2014, has proven vulnerable to political circumstances, creating conditions for periodic institutional conflicts, legal uncertainty, and the personalization of power. Despite the existence of accountability mechanisms, such as impeachment or early termination of powers, their complexity and political motivation do not contribute to real control over the President's activities.

Contemporary challenges to democratic development require a rethinking of the role of the head of state, taking into account the principle of separation of powers, strengthening institutional accountability, and strengthening the balance between the branches of government. Ukraine has the potential to introduce a new model of presidency that would guarantee stability, curb usurpation tendencies, and promote effective governance. In this context, it is important to take into account foreign experience, especially that of countries with a similar historical and political heritage, such as Poland or Lithuania, as

well as the flexible elements of France's semi-presidential system. At the same time, mechanically copying foreign models is unacceptable — reform must take into account the national context, political culture, and level of institutional maturity.

The practical significance of the study lies in outlining conceptual guidelines for future constitutional reform capable of strengthening the legitimacy of the presidency, ensuring the stability of the democratic system, and improving the quality of public administration. The recommended steps are: a clear normative distinction between the powers of the president and the government, simplification of accountability procedures, improvement of mechanisms for public and parliamentary control, and depoliticization of the functioning of the institution of the head of state.

Further research should focus on empirical analysis of the impact of the presidential model on the stability of the political regime, the effectiveness of government decisions, and the level of public trust in state institutions. Particular attention should be paid to issues of interaction between the president and civil society institutions, as well as the assessment of risks associated with the potential usurpation of power in conditions of security and martial law.

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CHALLENGES AND STRATEGIES IN POLAND'S POLICY TOWARDS UKRAINE IN THE CONTEXT OF MIGRATION

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Abstract. *Migration from Ukraine to Poland, especially after 24th February 2022, has become one of the key issues of international policy. The aim of this publication is to analyze the strategies and challenges faced by Poland in managing Ukrainian migration, both at the national and international level. The work focuses on Poland's migration policy towards Ukraine, bilateral cooperation and activities in the EU and in relations with other countries. The analysis shows that Poland, as the main receiving country for migrants from Ukraine, is conducting intensive activities both at the national and international level. These include the integration of migrants, financial support and relocation policies, which require a long term strategy. The adopted conclusions can constitute a basis for considerations on the future of Poland's migration policy towards Ukraine and its role in the European migration management system.*

Keywords: Poland, Ukraine, migration, international policy, EU, integration of migrants.

1. INTRODUCTION

The war in Ukraine, which began on 24th February 2022, has sparked one of the largest migration crises in Europe since World War II (UNHCR, 2024a). Faced with Russia's brutal attack, millions of Ukrainian citizens were forced to flee their homes and seek refuge abroad. Poland, as a neighboring country, played a key role in the first days and weeks of the conflict, becoming the main destination for Ukrainian migration (Brunarska et al., 2023).

The scale of the refugee influx, their needs and the long term effects of the presence of a large group of migrants have had a significant impact on Poland's domestic migration policy and its position in international politics (Nowak, 2022). The speed and scope of actions that Poland had to take in response to the humanitarian crisis have revealed both the willingness of society and institutions to help (Pac, 2024b) and the systemic gaps in migration management (Institute of Public Affairs, 2024).

In response to the rapidly changing situation, Poland has taken a number of legislative, administrative and diplomatic actions aimed at both supporting refugees and protecting the state's interests (Office for Foreigners, 2023). These issues have also been raised in the EU, where Poland has sought solidarity, financial support and the development of a common approach to the problem of migration (Ministry of Finance, 2024c).

This paper will discuss the causes of Ukrainian migration to Poland (Adamczak, 2022), the main challenges related to its effects (Chmielecka, 2021), and the strategies undertaken by Poland in response to this crisis. Particular attention will be paid to international activities – both in bilateral relations with Ukraine (Ministry of Foreign Affairs, 2022) and in the context of cooperation within the EU and with other countries. This analysis will contribute to a better understanding of how Poland is adapting its migration policy in the face of the dynamic challenges of the contemporary world.

The aim of this article is to understand Poland's role in managing the migration crisis caused by the armed conflict in Ukraine and to assess actions taken at both the national and international levels. The mass influx of refugees after 24th February 2022 had a significant impact on Poland's migration policy, as well as on its relations with the EU and other countries (Nowak, 2022).

The analysis focuses on key aspects of Ukrainian migration to Poland, including its causes, socio-economic consequences (Deloitte, 2024; National Bank of Poland, 2023), and political challenges (Pac, 2024a). Particular attention will be paid to the strategies implemented by Poland to manage this process, as well as cooperation with Ukraine and international institutions in the field of migration regulation and assistance to refugees (International Organization for Migration, 2023).

Moreover, identification of some of the salient challenges facing Poland from such a massive influx of Ukrainian refugees is another key objective. For example, how it has changed the country's internal and external political strategies. This article also examines legal regulations, support mechanisms for migrants and diplomatic activities conducted by Poland within the EU and in the international arena (Ministry of Foreign Affairs, 2024a). Additionally, it will discuss forecasts regarding the future migration policy of Poland towards Ukraine and its impact on the stability of the region.

In the context of the set objectives, the research question arose: What challenges and strategies has Poland adopted in its international policy towards Ukrainian migration and what consequences have they had for its relations with Ukraine and the EU?

In response, the hypothesis was adopted that Poland, as one of the main countries receiving refugees from Ukraine, has implemented both national and international strategies aimed at managing the migration crisis. Despite intensive actions, the lack of a uniform migration policy in Europe and differences in the approaches of EU member states (European Commission, 2024b; Kaczmarek, 2021) pose a significant challenge to effective migration management in the long term at the national level.

2. MATERIALS AND METHODS

The work employs a descriptive analysis based on EU documents (e.g., European Commission, 2024b; Council of the EU, 2024b), reports of international organizations (e.g., UNHCR, 2024; OECD, 2024a), and statistical data from the European Commission, Eurostat, and FRONTEX on migration and asylum policy (e.g., Eurostat, 2024b; FRONTEX, 2024a). The analysis is also based on scientific materials such as official reports from Polish governmental bodies (e.g., Ministry of Family and Social Policy, 2023; National Bank of Poland, 2023) and studies by experts dealing with migration policy and international relations (e.g., Nowak, 2022; Pac, 2024a).

The study is divided into three parts. The first presents the causes and consequences of the migration of Ukrainian citizens to Poland after 24th February 2022. This analysis takes into account both the factors determining migration (Adamczak, 2022) and its social and economic consequences (Deloitte, 2024; Brunarska et al., 2023). The second discusses Polish-Ukrainian relations in the context of migration, with particular emphasis on Poland's migration policy, bilateral initiatives, and challenges encountered (Ministry of Foreign Affairs, 2024e; International Organization for Migration, 2023). The third part is devoted to Poland's role in international policy related to Ukrainian migration. It presents actions taken in the EU (Kaczmarek, 2021; Ministry of Foreign Affairs, 2024c) and cooperation with other countries, as well as forecasts regarding Poland's future migration policy (Institute of Public Affairs, 2024).

3. RESULTS

Migration from Ukraine to Poland intensified after 24th February 2022, when Russia launched a full-scale invasion of Ukraine. This conflict caused a mass exodus of civilians seeking refuge in neighboring countries, especially Poland, which became the main destination for war refugees (Nowak, 2022). According to data from the United Nations High Commissioner for Refugees (UNHCR), over five million people crossed the Polish-Ukrainian border in the first months of the war (UNHCR, 2023).

A report from Eurostat (2023) shows that Poland became the main destination for refugees from Ukraine, accepting the largest number of migrants in the entire EU. Migrants are mainly women and children, which is a result of Ukraine introducing the obligation to mobilize men of military age (Pac, 2024a).

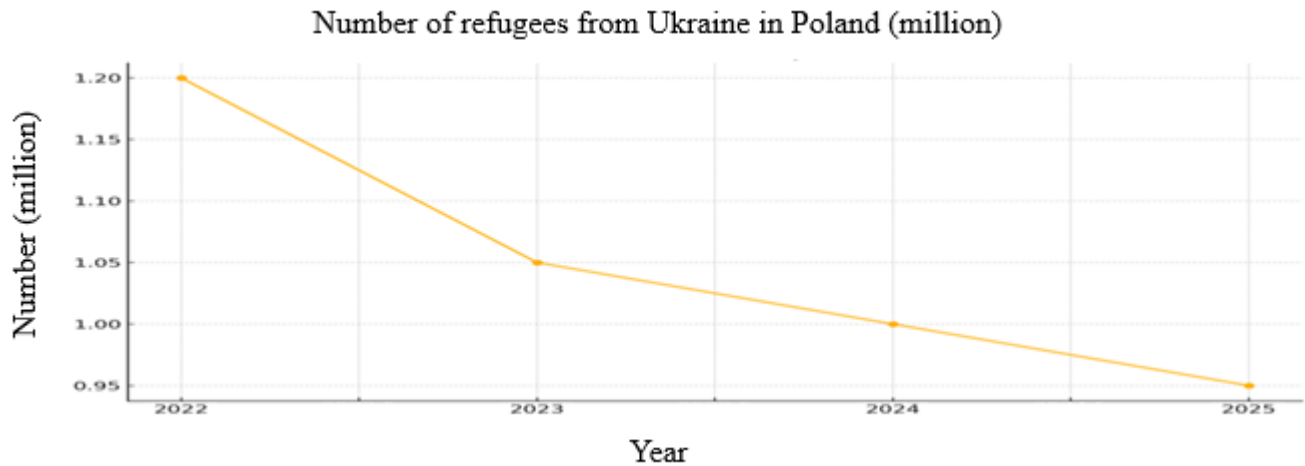


Figure 1. Social and economic consequences of Ukrainian migration for Poland

Since the outbreak of the war in Ukraine in February 2022, Poland has become a key country for Ukrainian refugees. According to UNHCR data, over 2.5 million people had been recorded in Poland in the months following the initial influx (UNHCR, 2024). Although some of them left for the West or returned to Ukraine, a significant number decided to stay in Poland, which caused unprecedented social, economic and demographic changes. Poland, which had experience with Ukrainian labour migration before the war, had to face an entirely new challenge: integrating war refugees, the majority of whom are women and children. In 2021, for example, Ukrainians were already the largest group of foreigners on the Polish labour market (Ministry of Family and Social Policy, 2022a).

Poland is struggling with the problem of an ageing society and a low birth rate. The influx of young families from Ukraine has changed local demographic statistics, especially in the largest cities (Pac, 2024a). In Warsaw, Krakow, and Wroclaw, Ukrainian children make up a significant percentage of students in some schools, which has forced the educational system to adapt by increasing the number of preparatory classes and hiring intercultural assistants and teachers of Polish as a foreign language (Ministry of Education and Science, 2024).

The first months of the war showed great solidarity among Polish society, but in the long term, challenges emerged. Overloaded schools, health clinics, the social welfare system, and rising housing rental prices (Polish Economic Institute, 2024b) caused dissatisfaction among some local communities. The language and cultural barriers make it difficult to quickly integrate Ukrainians into social life, which can cause frustration among both migrants and Poles (Batory Foundation, 2023).

The presence of Ukrainians in Poland is not limited to problems and tensions. They enrich cultural life – Ukrainian restaurants, media, festivals, and artistic events are emerging in cities (Center for Cultural Analysis, 2023). Poles have the opportunity to learn more about the culture of their neighbor, and children learn to live in a more diverse, multicultural environment.

Ukrainian workers were the backbone of many industries before the war. According to a report from the Social Insurance Institution (2024), in 2021 Ukrainians made up over 70% of all foreigners registered for social insurance in Poland. After 2022, their number increased even more, although initially most refugees were women who needed time to enter the labour market. Today, Ukrainians are filling staffing gaps in construction, catering, agriculture, and elderly care (Ministry of Family and Social Policy, 2023). A larger number of residents means increased consumption — migrants rent apartments, buy goods and services, use public transport, education, and healthcare. This stimulates the economy and increases revenues from VAT and PIT taxes (National Bank of Poland, 2023). On the other hand, some migrants send money to their families in Ukraine, which is an outflow of funds from the Polish economy (Organisation for Economic Co-operation and Development, 2024a).

Between 2022 and 2024, Poland spent billions of złoty on refugee assistance: social benefits, housing benefits, education, transport and healthcare (Ministry of Finance, 2024a). Some of this spending was covered by EU funds, but Poland also had to dip into its own budget reserves (Ministry of Finance, 2024c).

The sudden increase in demand for apartments has caused a sharp increase in rental prices, especially in large cities. According to a report by the Polish Economic Institute (2024b), rental prices in Warsaw increased by an average of 20% in 2022.

Poland has gained a reputation in Europe and around the world as the country that has best managed such a large influx of refugees. However, in the long term, improved coordination with the EU is necessary to avoid a situation in which Poland bears most of the costs of this assistance alone.

The long-term consequences of migration will depend on several key factors: the effectiveness of social integration, the development of an effective housing policy, adequate educational support and the maintenance of a social climate conducive to cooperation. If Poland manages this process well, migration can become also a strong development impulse.

Ukrainian migration has changed the face of contemporary Poland. It has brought difficulties, but also opened up new opportunities: for the economy, demography, culture and international position (Pac, 2024b). The use of these opportunities depends on wise, long-term political decisions and on the will of society to accept new challenges with openness and responsibility (Pac, 2024a).

At the beginning of the conflict in Ukraine, Poland adopted an open-door policy, offering Ukrainian citizens shelter and assistance. According to the Act of 12th March 2022 on Assistance to Ukrainian Citizens, refugees can legally stay in Poland for 18 months with the possibility of extending their stay. These provisions also allow for full medical care, education and access to the labour market.

In practice, Poland provides refugees not only with emergency assistance, but also with long-term support. This includes, among other things, assistance in arranging housing, access to psychological support, and support in social and professional integration. Polish border guards and administrative bodies have organized reception points and assistance centers that facilitate refugee registration procedures (Brunarska et al., 2023).

Moreover, in response to the growing influx of refugees, Poland has also introduced cooperation mechanisms with international organizations, such as UNHCR and the International Organization for Migration (IOM), in order to ensure coordination of aid activities (International Organization for Migration, 2023).

The most important legal instrument implemented in response to the refugee crisis was the Act on assistance to citizens of Ukraine in connection with the armed conflict on the territory of that country of 12th March, 2022 (so-called special Act). This Act granted Ukrainians a number of rights: legal residence for 18 months (later extended), the right to work without additional permits, access to health care, education, as well as social and family benefits. This document turned out to be one of the most innovative and liberal legal structures covering migration in Europe (Deloitte, 2024).

Poland has also simplified administrative procedures. Ukrainian citizens can obtain a national identification number, called a PESEL number with UKR status, which allows access to public services and the labour market (Ministry of Digital Affairs, 2023). As part of the amendment to the act from 2023, long-term residence on the basis of legal work or studies has also been made possible (Office for Foreigners, 2023).

Both the central and local governments played a key role in organizing assistance for Ukrainian citizens. The Ministry of Internal Affairs and Administration and the Ministry of Family and Social Policy coordinated activities in the field of accommodation, registration, financial assistance, and health care (Ministry of Internal Affairs and Administration, 2023). A special role was played by labour offices, which implemented professional activation mechanisms that enabled Ukrainians to quickly enter the labour market (Ministry of Family and Social Policy, 2023).

In addition to state structures, non-governmental organizations played a huge role, such as the Ocalenie Foundation, the Polish Humanitarian Action, Caritas Poland and the Polish Red Cross. They provided shelter, food, legal and psychological assistance, and supported the process of social integration of refugees (Ocalenie Foundation, 2024). These organizations cooperated with local governments and international institutions, including UNHCR and UNICEF.

The Ministry of Education and Science has taken steps to integrate Ukrainian children into the education system. Preparatory classes have been created, the number of supporting teachers has been increased, and educational platforms in Ukrainian have been launched (Ministry of Education and Science, 2024). Local governments have invested in additional places in schools and kindergartens to meet growing educational needs.

Although Poland has gained international recognition for its openness to refugees from Ukraine, in the long term, migration policy must be anchored in an integration strategy. Challenges to implementing an effective integration program include language barriers, housing difficulties, overloaded healthcare, and the risk of social exclusion. In the long term, it will be necessary to develop an immigration policy that takes into account both humanitarian, social and economic aspects.

Poland's migration policy towards Ukrainian citizens is an example of a dynamic and adaptive approach to the crisis situation. Thanks to the efficient implementation of legal solutions and the involvement of public institutions and non-governmental organizations, Poland has created a support system that has made it easier for refugees to adapt to a new country. In the coming years, it will be crucial to develop an integration policy and simultaneously monitor the effectiveness of its implementation.

In the face of the migration crisis, Poland and Ukraine have begun close cooperation at the governmental, local and non-governmental levels. One example of joint action is the establishment of humanitarian aid programs that enable the transfer of essential resources for refugees, such as food, clothing, medicine and hygiene products.

Both countries jointly coordinate assistance to refugees, organizing transport, providing shelter and providing assistance in employment and education. Additionally, Poland participates in integration projects aimed at Ukrainian citizens, such as Polish language courses and vocational training, which help migrants adapt more quickly to Poland (Ministry of Foreign Affairs, 2023).

Thanks to cooperation with the Ukrainian authorities, it was also possible to launch the so-called "humanitarian corridors", which facilitated migration and improved the safety of people crossing the border. Joint coordination of activities on the border, especially in the first days of the war, was of key importance for maintaining order and the efficiency of the transport of refugees.

4. CHALLENGES AND CONFLICTS OF INTEREST IN POLISH-UKRAINIAN RELATIONS REGARDING MIGRATION

Although cooperation between Poland and Ukraine in the context of migration is relatively intensive, it has not been without problems and tensions. One of the main problems was the issue of logistics – the influx of millions of refugees in a short period of time required the mobilisation of enormous material and human resources, which was a burden on both the Polish government and international organizations (Pac, 2024b).

Polish-Ukrainian relations in the area of migration are complex and multidimensional. Although Poland is a key partner of Ukraine in terms of humanitarian, economic and political support, mass migration after 2022 has also revealed many challenges and conflicts of interest. Migration on such a large scale generates both development opportunities and social, economic and political tensions. The aim of this study is to analyze the most important challenges in Polish-Ukrainian relations regarding migration and to identify areas where conflicts of interest appear.

Another difficulty in Polish-Ukrainian relations was the issue of providing refugees with food, clothing and basic necessities, especially in the first days after the outbreak of the war, when Poland was

not prepared for the mass influx of people. The issue of securing transport and places for settlement was also a serious logistical problem that Polish and Ukrainian authorities struggled with.

Despite aid from the EU, Poland struggled with housing concerns and the integration of refugees into the labour market, and public debate raised concerns about the burden on public services, education and the labour market (Pac, 2024b).

One of the main challenges is the social integration of migrants from Ukraine. Language barriers, cultural differences, and limited resources in education, health, and housing lead to tensions in local communities (Batory Foundation, 2023). Poles, who initially showed great solidarity, are increasingly expressing concerns about the overload of public services and competition on the labour market.

Ukrainian migration also causes economic conflicts. On the one hand, Ukrainian workers fill staffing gaps in the Polish economy; on the other, there are concerns about lower wages in some industries and the displacement of local workers (National Bank of Poland, 2023). In addition, issues related to the export of Ukrainian grain and agricultural products cause tensions between Polish and Ukrainian producers, as seen, for example, in farmers' protests and trade discussions at the EU forum.

Although Poland supports Ukraine in the context of the war, there are disputes at the political level, including on issues related to the financing of aid, the distribution of EU funds and legal regulations concerning migrants (Ministry of Foreign Affairs, 2024e). The differences in expectations of both sides also concern the long-term perspective – Poland expects that some refugees will return after the end of the war, while Ukraine fears a permanent outflow of labour (Ministry of Foreign Affairs, 2024e). Migration has created gaps in the Ukrainian labour market. Due to the migration of the population for work, the problem of a shortage of workers is becoming increasingly acute (Lysiuk & Britchenko, 2020).

Public opinion polls indicate an increase in hostility towards migrants from Ukraine among some social groups in Poland. The media and politicians sometimes instrumentalize the topic of migration, which deepens social polarization and can lead to conflicts. In turn, Ukrainians sometimes feel a lack of full acceptance and difficulties in obtaining equal opportunities on the labour market, which reduces their trust in the Polish institutional system (Ocalenie Foundation, 2024).

Despite numerous challenges, there are also areas in which Poland and Ukraine can develop cooperation: creating joint integration projects, economic cooperation based on partnership, as well as coordination of activities at the EU level. Developing mechanisms of dialogue and negotiation is crucial for minimizing conflicts of interest and building long-term relations based on trust.

Challenges and conflicts of interest in Polish-Ukrainian relations regarding migration are inevitable in a situation of mass population movement. However, it is crucial that both sides – Poland and Ukraine – take action to build lasting cooperation mechanisms that will support both social and economic development. In the long term, only a well-managed migration policy based on mutual understanding will reduce tensions and use the potential that migration brings.

5. THE FUTURE OF POLAND'S MIGRATION POLICY TOWARDS UKRAINE – FORECASTS AND POSSIBLE DIRECTIONS OF ACTION

Poland's migration policy towards Ukraine will require special attention in the coming years. Due to the ongoing armed conflict in Ukraine, changing geopolitical realities, and economic and social challenges, Poland must develop long-term migration strategies. The aim of this study was to present forecasts regarding the future of Poland's migration policy towards Ukraine and to indicate possible directions of action that will allow us to meet the upcoming challenges.

In coming years, it is likely that some refugees from Ukraine will decide to stay in Poland permanently (Organisation for Economic Co-operation and Development, 2024a). This means that integration policy must be strengthened, especially in the areas of education, the labour market and housing (Batory Foundation, 2023). Poland, struggling with an aging society, can treat Ukrainian migration as a demographic opportunity, but this requires a well-planned strategy (Central Statistical Office, 2024).

The influx of migrants from Ukraine will continue to affect the Polish economy, especially in sectors requiring a large number of workers, such as construction, healthcare, agriculture and logistics (National Bank of Poland, 2023). At the same time, Poland must prepare for the challenges related to the recognition of migrants' professional qualifications, their professional activation and prevention of phenomena related to work below qualifications.

It will be necessary to develop Polish language learning programs, career counseling, courses to improve qualifications and activities supporting social integration. It is also important to increase the availability of housing and invest in social infrastructure in large cities.

Poland should continue reforms that facilitate the legalization of residence, work, and establishment of business activities by Ukrainian citizens. An important element will be the simplification of procedures for the recognition of qualifications and the introduction of fast-track mechanisms for specialists in key industries.

Cooperation with the EU and international organizations will be crucial for financing integration activities and securing the interests of both countries. Joint Polish-Ukrainian programs and active participation of Poland in shaping migration policy at the EU level are needed.

The biggest challenges include: growing social tensions, rising populism and anti-immigration sentiment, overloaded healthcare and education systems, and housing difficulties. Failure to build a coherent migration policy could lead to the marginalization of migrants and deepening social divisions.

The future of Poland's migration policy towards Ukraine depends on the ability to develop a long-term, sustainable strategy. It is necessary to combine humanitarian, economic and social actions in a way that will not only mitigate the effects of the crisis, but also use the potential of migration to build a common future. Only through a coordinated policy will Poland be able to meet the challenges that the dynamic situation in the region brings.

After the war began, Poland became one of the EU leaders in supporting Ukrainian refugees. Poland, in cooperation with the EU institutions, demanded more financial support and solidarity in the matter of refugee relocation. According to Eurostat data (2023), Poland accepted a massive number of refugees from Ukraine, which constituted the largest group of all war refugees in the EU.

Poland is participating in negotiations on the shape of the EU's migration policy, including the Pact on Migration and Asylum. Warsaw emphasizes the need to take greater account of the specificity of the EU's border states and countries that accept the most refugees, such as Poland, Slovakia and Romania (Ministry of Foreign Affairs, 2024a). These negotiations also cover the issues of refugee relocation, sharing responsibility and flexibility in implementing asylum policy (Council of the EU, 2024b; European Commission, 2024b).

Poland effectively uses EU financial mechanisms supporting refugee-hosting countries, such as the Asylum, Migration and Integration Fund (AMIF), the Refugee Aid Fund and crisis funds granted under REACT-EU (European Commission, 2024a; Ministry of Finance, 2024c). These funds enable the financing of housing, education, healthcare infrastructure and integration programmes for refugees from Ukraine.

Poland is actively involved in shaping solidarity policy in the EU, emphasizing the need to share the costs of the migration crisis and ensure an even distribution of refugees between Member States. At the same time, Warsaw draws attention to the need to maintain sovereignty in decisions regarding the admission of migrants, which causes tensions in negotiations with other EU countries (Ministry of Foreign Affairs, 2024c; European Commission, 2024b).

Poland cooperates with the European Commission, the Council of the EU and EU agencies such as FRONTEX and the European Union Agency for Asylum (EUAA) to ensure effective migration management. Thanks to this cooperation, projects are implemented in the field of border protection, providing humanitarian aid, as well as supporting education and health systems in regions most affected by the influx of refugees (FRONTEX, 2024b).

Future challenges include further negotiations on the shape of the Common European Asylum System, increasing the efficiency of the use of EU funds, and strengthening Poland's position as a leader among the EU's frontline states. Poland also faces the task of reconciling national priorities with the demands of European solidarity, which will require skillful diplomacy and the ability to build alliances (Ministry of Foreign Affairs, 2024c; Institute of Public Affairs, 2024).

The role of Poland in the EU in the context of migration from Ukraine cannot be overestimated. Thanks to active involvement in negotiations, effective fundraising and participation in solidarity policy, Poland is strengthening its position in the European arena and shaping the future of the common migration policy.

Poland also took an active part in negotiations on solidarity funds with the EU, which were aimed at supporting countries receiving refugees. Programmes such as the Asylum, Migration and Integration Fund provided Poland with access to significant funds for helping refugees and their integration (European Commission, 2022a).

Cooperation with the EU was also important in the context of coordinating actions at the borders with other Member States, which facilitated controlling the influx of migrants and providing logistical support.

Poland cooperated not only with the EU, but also with neighbouring countries, such as Germany, Slovakia and the Czech Republic, in coordinating activities for refugees. Thanks to cooperation with these countries, it was possible to better separate migrants and provide support in the organisation of transport, shelter and health care.

Poland, as a member of the EU and a signatory to numerous international agreements, plays an important role in international migration management. In the face of contemporary challenges – such as refugee crises, labour migration, or climate change – diplomatic and legal cooperation with other countries is becoming crucial. The aim of this study is to present Poland's activities within the framework of international cooperation on migration, with particular emphasis on diplomacy, international agreements, and cooperation mechanisms within the EU.

Poland conducts active migration diplomacy, participating in negotiations at the bilateral and multilateral level. Through the activities of the Ministry of Foreign Affairs and diplomatic missions, Poland participates in migration consultations with the countries of Central and Eastern Europe, as well as within the framework of the Eastern Partnerships with Ukraine, Georgia and Moldova (Ministry of Foreign Affairs, 2024a). Poland is also involved in the activities of the European External Action Service and participates in the development of EU positions towards third countries (Ministry of Foreign Affairs, 2024c).

Poland is a party to key international agreements regulating the rights of migrants, including the 1951 Geneva Convention and the 1967 New York Protocol relating to the Status of Refugees (United Nations High Commissioner for Refugees, 1951). It also participates in the Global Compact for Migration adopted by the UN in 2018, which, although non-binding, provides a framework for cooperation in the protection of migrants (United Nations, 2018). At the regional level, Poland is part of the Schengen system, Dublin III and participates in the work of FRONTEX – the European Border and Coast Guard Agency (FRONTEX, 2024a).

Poland co-creates the migration policy of the EU, participating in the development of the Common European Asylum System and in the negotiations of the Pact on Migration and Asylum (European Commission, 2024b). One of the key elements is cooperation in the field of refugee relocation, protection of external borders and joint FRONTEX operations, as well as in the field of return policy towards illegal migrants (Council of the EU, 2024a; FRONTEX, 2024b).

Outside the EU framework, Poland also concludes bilateral agreements, e.g. with Ukraine, Belarus, Georgia and other Eastern Partnership countries, on labour migration, visa facilitation and cooperation in combating illegal migration (Ministry of Internal Affairs and Administration, 2024a). Initiatives such as the

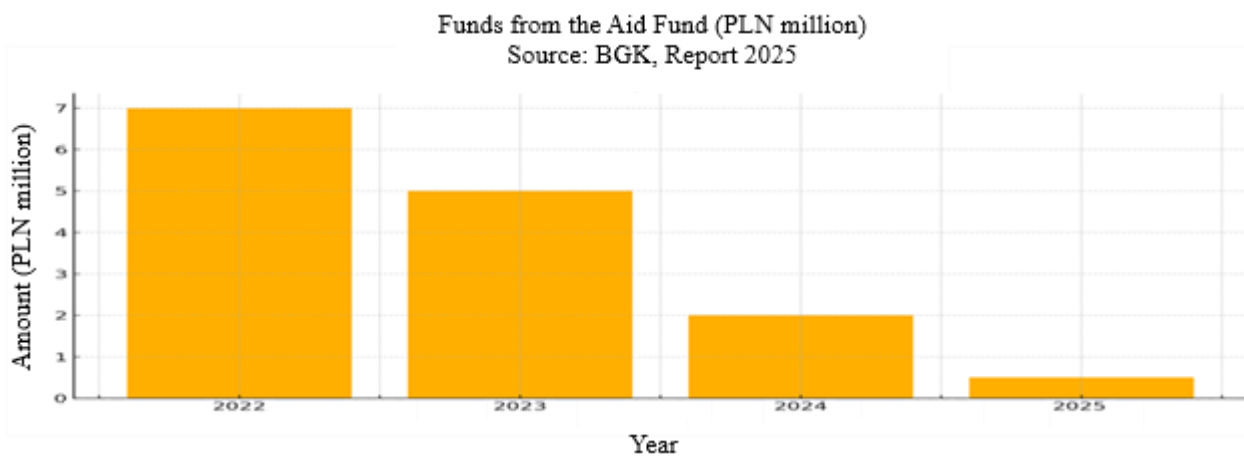
Visegrad Group provide an additional forum for the exchange of experiences and coordination of migration activities (Visegrad Group, 2024).

The biggest issues of the day are the growing geopolitical tensions, humanitarian crises and the divergence of interests of EU member states in the issue of sharing responsibility for refugees. In the future, it will be necessary to deepen cooperation in the protection of human rights, management of labour migration and building a more equitable system of responsibility between states.

Poland's cooperation with other countries in managing migration is of fundamental importance for ensuring security, stability and respect for human rights. Thanks to diplomacy, international agreements and activity in EU and global structures, Poland can effectively respond to migration challenges and build a system based on solidarity and cooperation.

Poland also concluded a number of bilateral agreements with Ukraine, which enabled mutual assistance in ensuring the safety of refugees and humanitarian transport. This cooperation also included initiatives supporting the social integration of refugees, e.g. organizing language programs or vocational courses (Ministry of Foreign Affairs, 2022).

Poland, being one of the main countries receiving refugees from Ukraine, must not only cope with current challenges, but also plan a long-term migration policy in this case. The future depends on the stabilization of the situation in Ukraine and further support from the EU and international organizations (The European Union, 2022).



In the long term, Poland will need to focus on integrating refugees into the labour market, improving access to education and ensuring adequate housing conditions. Changes in immigration policy will also be needed, taking into account the diverse needs of migrants, both those who arrived before the war and those who arrived after its outbreak (Institute of Public Affairs, 2024).

6. CONCLUSION

Faced with the influx of millions of migrants, Poland has taken a number of actions, both in terms of legal regulations and humanitarian, integration and logistical support. Poland has become a key country accepting refugees, which has required rapid action at the political, administrative and social levels. The migration crisis triggered by the war in Ukraine has presented Poland with unprecedented challenges, both domestically and internationally.

At the international level, Poland actively participated in negotiations on the division of responsibility for the migration crisis and obtained financial and organizational support from the EU and international organizations. Nevertheless, the challenges related to the integration of migrants and the long-term consequences of the crisis remain relevant.

The massive influx of refugees after the Russian intervention in Ukraine took the Polish government and the national economy by surprise. The Polish government was forced into drastic action, given the

costs of first accepting 1.5 million and then inducting 700,000 migrants into the national economy over a period of year. The Polish treasury took the brunt of the initial costs of the influx, totalling 2.8 billion PLN in only one year (Bankier.pl, 2024).

This thesis looks at the drivers of the Polish government's response to the crisis, and its relative successes in formulating an effective migration policy, that was rolled out, countrywide over the period 2023–2025.

The assessment of Poland's role in migration negotiations indicates that this country has become one of the main actors in shaping migration policy in Europe. Cooperation with Ukraine, the EU and neighbouring countries has allowed for effective crisis management, but difficulties have also arisen, such as tensions related to the relocation of refugees or the burden on national social welfare and education systems. The research hypothesis adopted at the beginning has been confirmed, which allows for the formulation of specific recommendations for the future. In the recommendations regarding Poland's future migration policy, several key aspects should be indicated (Institute of Public Affairs, 2024):

- long-term integration policy – actions for the integration of migrants, including vocational training, language courses and professional activation programmes,
- permanent cooperation with the EU – striving for further financial and institutional support within the framework of European funds,
- better international coordination – strengthening relations with countries in the region in order to jointly manage future migration crises,
- modernization of migration policy – adaptation of legal regulations and administrative systems to new challenges related to the large number of migrants.

In summary, Poland has played a key role in managing the migration crisis, but in the future it will need to focus on long-term integration strategies and further international cooperation. Migration from Ukraine has become not only a challenge but also an opportunity for Poland's social and economic development, if managed properly.

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