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ENSURING THE COMPETITIVENESS AND FINANCIAL STABILITY OF TRANSPORT AND LOGISTICS COMPANIES IN THE CONDITIONS OF RUSSIAN-UKRAINIAN WAR

The article analyzes the features and factors of the international market of transport and logistics services and new trends caused by the full-scale russian invasion of Ukraine. The market of transport and logistics services of Ukraine in terms of production and financial performance of its participants has been also studied. Moreover, the paper presents a comparative analysis of the process of forming a strategy for the competitiveness of a transport and logistics company in peacetime and in wartime. It is noted that in wartime a company should be aimed not so much at increasing market share, but at preserving its position. In this aspect, the end-to-end monitoring of the financial performance of a transport and logistics company plays an important role.

The authors identify seven main stages of formation of a strategy of competitiveness of a transport and logistics company in wartime, which are analyzed in detail in the work. The paper also emphasizes that the main parameters determiming the competitiveness of transport and logistics services are complex parameters of quality, price and compliance of the product with certain standards. The analysis has identified key evaluation indicators for each of the above parameters. The conclusions of the authors are illustrated by the scheme of ensuring the competitiveness of the transport and logistics company. Thus, ensuring competitiveness is a complex mechanism of interaction of a transport and logistics company with other market subjects, the formation of competitive advantages and ensuring financial stability, differentiated by time, manifestation, structure and is the basis for determining the efficiency of a transport and logistics company and its real competitive position on the market.

A promising area of research is the development of measures and tools to ensure the efficiency of transport and logistics companies by identifying and implementing their key competitive advantages in military conditions, the formation of alternative strategies for competitiveness.

Keywords: transport, logistics, competition, competitiveness, financial stability, cargo transportation

JEL classification: ***H61, F43, L90, L98, O2***

У статті розкрито сутність, чинники та нові тренди розвитку міжнародного ринку транспортно-логістичних послуг, що зумовлені повномасштабним вторгненням Росії в Україну. Досліджено також ринок транспортно-логістичних послуг України з точки зору виробничо-фінансових показників його учасників. У роботі представлено порівняльний аналіз процесу формування стратегії конкурентоспроможності транспортно-логістичної компанії в умовах мирного та воєнного часу. Зазначається, що у воєнний час компанія повинна бути націлена не стільки на збільшення частки ринку, скільки на збереження своїх позицій. У цьому аспекті важливу роль відіграє наскрізний моніторинг фінансової діяльності транспортно-логістичної компанії.

Автори виділяють сім основних етапів формування стратегії конкурентоспроможності транспортно-логістичної компанії у воєнний час, які детально проаналізовано в роботі. Наголошується, що основними параметрами, які визначають конкурентоспроможність транспортно-логістичних послуг, є комплексні параметри якості, ціни та відповідності продукту певним стандартам. У результаті аналізу визначено ключові оціночні показники для кожного із зазначених вище параметрів. Висновки авторів ілюструються схемою забезпечення конкурентоспроможності транспортно-логістичного підприємства.

Таким чином, забезпечення конкурентоспроможності є комплексним механізмом взаємодії транспортно-логістичного підприємства з іншими суб'єктами ринку, формування конкурентних переваг та забезпечення фінансової стійкості, диференційовано за часом, проявом, структурою і є основою для визначення ефективності транспортно-логістичної компанії та її реальної конкурентної позиції на ринку.

Перспективним напрямком наукових досліджень є розробка заходів та інструментів забезпечення ефективності діяльності транспортно-логістичних компаній шляхом виявлення та реалізації їх ключових конкурентних переваг в умовах війни, формування альтернативних стратегій конкурентоспроможності.

Ключові слова: транспорт, логістика, конкуренція, конкурентоспроможність, фінансова стійкість, вантажоперевезення

JEL classification: ***H61, F43, L90, L98, O2***

Introduction

The Russian-Ukrainian war of 2022 caused heavy losses for Ukraine, primarily human casualties and mass killings of civilians. Military action and rocket fire have led to a humanitarian catastrophe in the country and daily ruin the Ukrainian economy, destroying business and infrastructure. As of April 11, 2022, the losses of the Ukrainian economy since the beginning of the war amounted to $ 600 billion [1]. According to experts, Ukraine has already lost 30-50% of production capacity located in the east of the country. Only 1% of Ukrainian companies have not yet suffered losses due to hostilities [2]. The Russian-Ukrainian war has a painful effect on the entire world economy every day. It poses new difficult challenges for global markets, including the market of transport and logistics services. Due to the introduction of sanctions against Russia by many countries, including the EU, USA, Great Britain, Canada, Norway, and Japan, international logistics has undergone significant changes, and export-import relations and cargo flows to and from Russia have been suspended. Due to the closure of their airspace for Russia, other countries of the world had to build new logistics routes, which significantly increased the time of transportation and their cost.

With the deteriorating economic situation in all countries of the world as a result of the Russian-Ukrainian war, the question of the survival of transport and logistics companies, ensuring their competitiveness and stability in the modern world is acute. Ukrainian transport and logistics companies face special challenges, as they must provide reliable and secure logistics for the delivery of weapons and equipment for the Armed Forces of Ukraine, humanitarian aid and medicines to Ukraine in the context of significant destruction of transport infrastructure (airports, seaport blockade, roads and bridges destruction, Russia's bombing of railways). The issue of providing transport companies with fuel and lubricants is of great importance. Significant part of Ukrainian transport runs on oil, and Russia and Belarus have completely cut off supplies. In addition, Russia is methodically destroying Ukrainian oil depots, where fuel reserves are stored, by launching missile strikes. The outlined range of problems requires from transport and logistics companies new approaches to doing business, reviewing the formation of their strategic competitiveness in both short and long term to maintain market position.

The purpose and objectives of the study

The purpose of this article is to analyze the formation of the competitiveness of enterprises in the transport and logistics industry in the conditions of the Russian-Ukrainian war based on the results of optimizing its activities and ensuring sustainability in military conditions.

Analysis of recent publications

Studies of various aspects of enterprise competitiveness are presented in the publications of both domestic and foreign scholars. In particular, the works of Oliynyk N. and Buryk Y. are devoted to the systematization of approaches to determining the essence of the category "competitiveness" and factors ensuring the competitive advantage of the enterprise in the market [3]. Yanton-Drozdovska E. studied the impact of globalization on the international competitiveness of enterprises [4]. In the work of Khrapkina V.V. the periods of formation and development of the competitiveness management system are determined and the modern views on the competitiveness management of enterprises in the conditions of unstable market environment are generalized [5]. Logistics management has been seen as a major element in the customer service process in the papers of Persson Goran [6]. The analysis of the system of methods for assessing the competitiveness of the enterprise is presented in the work of Bogatskaya N.M. [7]. Edyta Mioduchowska-Jaroszewicz analysed the variability of the financial results of sector-varied enterprises [8].

In the conditions of the Russian-Ukrainian war there are tectonic shifts in the transport market and logistics services, which encourage companies to seek new business models, strategies that would create a competitive advantage of a fundamentally new level. While the analysis of the formation of enterprise competitiveness in peacetime is provided in many scientific papers and publications, research related to ensuring enterprise competitiveness in the transport and logistics industry in wartime remains limited. In our opinion, the analysis of trends and changes that have occurred since the beginning of the Russian-Ukrainian war in the global market of transport and logistics services in general and Ukraine in particular, and aimed at assessing the competitiveness of transport and logistics, is an important scientific and applied problem, which is currently not given proper attention due to the lack of knowledge of the problem and the asymmetry of information.

Research methods and information base.

The methodological basis of the study is dialectical and abstract-logical methods, which made it possible to identify the main factors and trends in the international market of transport and logistics services during the Russian-Ukrainian war and reveal their relationship and interdependence. The use of structural analysis allowed to establish the contribution of different modes of transport to the volumes of cargo transportation and freight turnover in Ukraine in the pre-war period. Based on a systematic and synergistic approach, wartime challenges for the activities of transport and logistics companies were studied in close connection with ensuring their competitiveness. The methods of analysis and synthesis made it possible to explore the stages of formation of the strategic competitiveness of a transport and logistics company and identify promising areas for strengthening competitive advantages in wartime conditions.

Research results

Transport and logistics services market during the war

The market of transport and logistics services is a system of organizational, economic, commercial, legal, financial and information relations between all its participants on the full range of operations with material flows (loading and unloading, storage, packaging, assembly, packaging, warehousing), insurance, customs clearance, settlement operations, information and documentation) for the transportation of goods and passengers to meet the needs of the economy at the local and regional, as well as national and international levels.

Russia's invasion of Ukraine has dramatically changed trends in the international market of transport and logistics services. Before February 24, 2022 the main factors influencing the market were: development of transport infrastructure, optimization of supply chains, expanding the range of goods and geography of transportation under the influence of globalization, global pandemic COVID -19 (Fig. 1).

Increasing competition in all modes of inland transport, especially during the COVID-19 pandemic, increasing the potential for interchangeability of various modes of transport have created new requirements for the quality of transport services, and highlighted the need to adapt the transport system

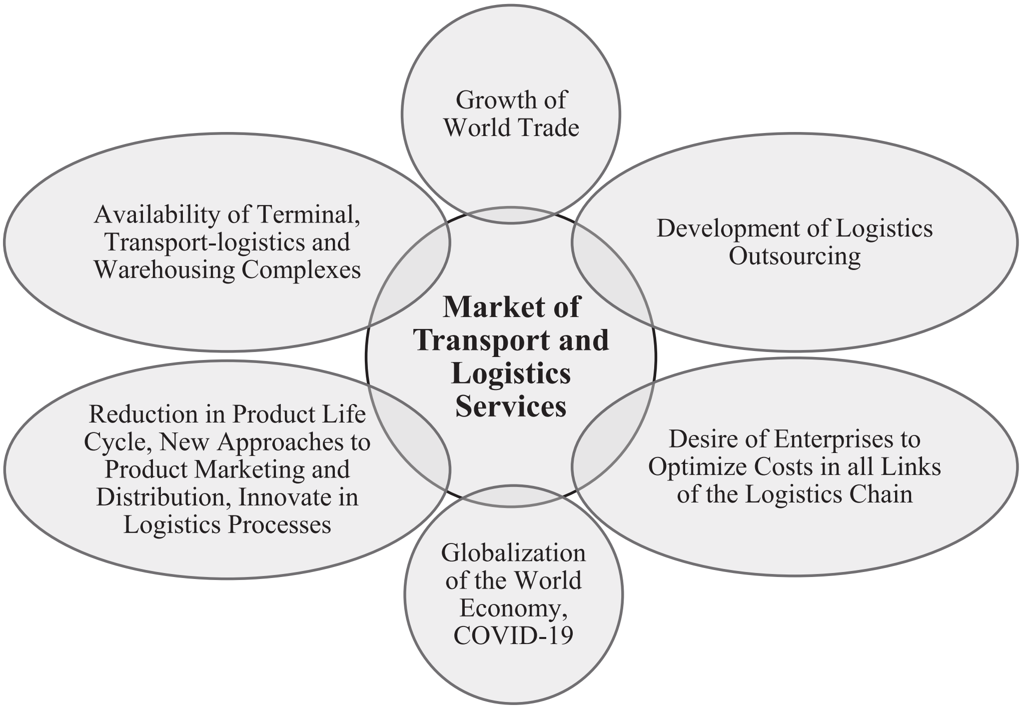

Fig. 1. Factors influencing the market of transport and logistics services before the russian-Ukrainian war
Source: own elaboration

to new environmental and safety standards. The definition and formation of the institutional framework for the development of the transport and logistics industry in the world market are carried out by international and regional organizations, whose role in the development of transport industry has grown significantly over the last decade. A diagram in fig. 2 presents the main international actors in the market of transport and logistics services.

The Russian-Ukrainian war has updated new trends and tendencies in the international transport and logistics market. Due to hostilities, the transport infrastructure of Ukraine as a transit state is being destroyed every day. 94 ships of Ukraine with export products are blocked by Russia in the Black Sea. Ignoring maritime law, the Russian military captures and takes hostage crew members of merchant ships. In particular, on the territory of the Mariupol Commercial Sea Port, the military of the Russian Federation took hostage members of the crew of the Blue Star-1 dry-cargo ship flying the flag of Liberia [9].

Due to the introduction of international sanctions against Russia and Belarus, there have been significant changes in the market of air, sea, road and rail transport, including container transportation. The structure and geography of cargo flows have changed, as well as the composition of the main market players. The problem of restructuring regional and international governmental organizations regulating the market of transport and logistics services has arisen due to violations of international norms and rules. First and foremost, Russia is to be excluded from the International Maritime Organization, the International Civil Aviation Organization, the Organization for Cooperation between Railways and the Danube Commission, as Russia neglects transport security issues when it destroys transport infrastructure and shells rolling stock, bypasses the Black Sea and river basins, captures the crews of merchant ships, decides not to return the leased

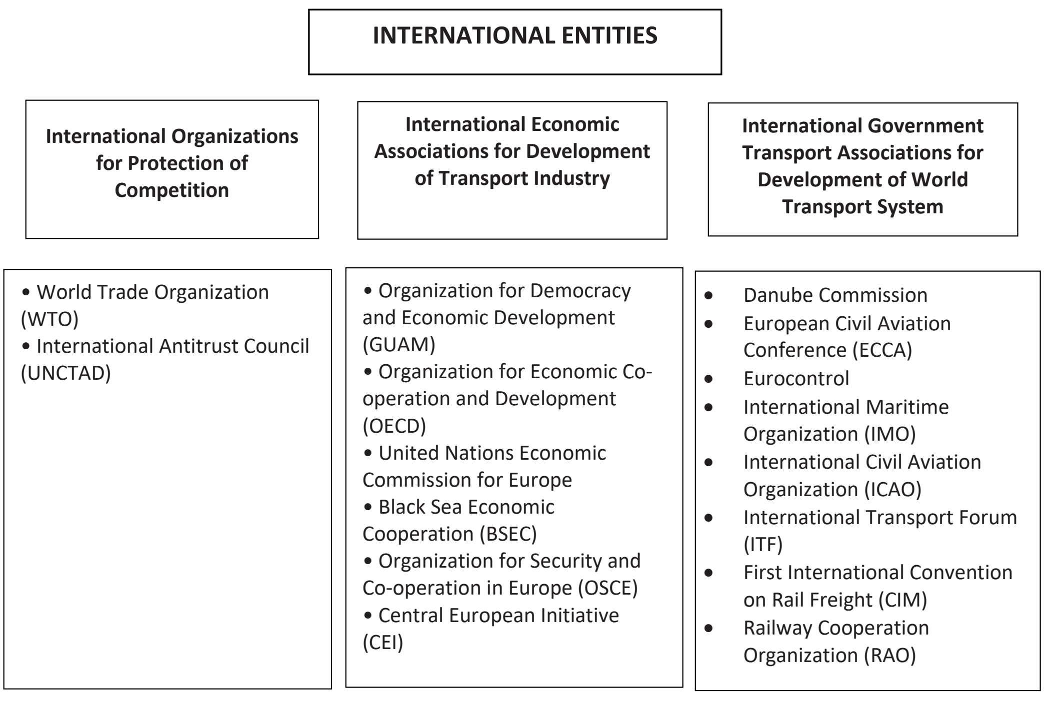

Fig. 2. International participants in the market of transport and logistics services
Source: own elaboration

aircrafts and not to service them due to lack of spare parts and equipment. For example, in April 2022, the Organization for Cooperation between Railways raised the issue of a meeting of the governing bodies to discuss the termination of communication with Russia and the exclusion of its representatives from participation in international organizations, deprivation of the right to make any decisions [10].

Let's analyze the main changes that have taken place in various segments of the international transport and logistics market due to the large-scale Russian invasion of Ukraine. In particular, in the field of air transport, the following changes can be identified. 32 countries, including the United Kingdom, Poland, Bulgaria, the Czech Republic, Lithuania, Latvia, Estonia, Romania, Slovenia, Germany and Finland, have closed their airspace to aircrafts from Russia [11]. Currently, air delivery from Europe is possible through Serbia, Turkey, Qatar and the UAE.

Due to the ban on the supply of aircraft and spare parts, equipment for airlines, it is impossible to operate the civil aviation fleet, including Airbus-322, which provided 40% of passenger traffic in Russia [10]. As a result, in early April 2022, the European Union Aviation Safety Agency blacklisted 21 Russian-certified airlines, including the national carrier Aeroflot, due to serious security concerns. The EU and the UK have imposed bans on the purchase of leased aircraft. The existing agreements will be terminated, which means the loss of 50% of the civilian fleet. In response, Russia decided not to return the leased aircrafts, which would further trigger lawsuits and worsen the investment climate in Russia [12].

The result of such actions was a decrease in the cargo turnover of Russian airlines in February 2022 by 1.4% (from 601.4 million t-km to 593.1 million t-km), and the volume of cargo transported by air – by 6.3%. Cargo turnover of Russia's largest cargo carrier AirBridge Cargo decreased by 5.9% in February, the volume of cargo and mail - by 6.7%. "Aeroflot" also has a negative trend: cargo turnover decreased by 13.8%, volume of transported cargo and mail decreased by 12.3% [12].

Mass bankruptcies of Russian airports have begun. On March 18, 2022, it became known that the payment of interest on loans at the Russian airport "Zhukovsky" was suspended due to the disappearance of international flights, which means a lack of income and financial problems for the carrier [12]. Restrictions also apply to road transport. In particular, the European Union banned the entry of trucks from Russia and Belarus into the EU and ordered Russian and Belarusian hauliers to leave the EU by April 16, 2022.

More and more EU countries are weakening the regime of work and rest for drivers transporting humanitarian goods to Ukraine. This is a derogation from the provisions of the EU Regulation 561/2006 on working hours and rest periods for truck drivers. The first countries to introduce mitigation were Poland, Belgium and Germany [14]. They were followed by Austria, Denmark, France and Hungary. For example, Austria allowed the movement of humanitarian goods on its territory on weekends and holidays. Denmark extended the working day from 9 to 11 hours. In addition, France, Poland, the Czech Republic and Germany exempted humanitarian aid transports to Ukraine from toll paymen. Hungary has exempted trucks weighing more than 3.5 tonnes from road tolls. The sanctions also apply to sea transport. The largest sea carriers refused to work with Russia. Global maritime logistics operators MSC and Maersk are canceling maritime cargo voyage. The United Kingdom, the United States, and Canada closed their ports to Russian and related ships at the beginning of the war, and in April 2022 EU countries joined them [15].

Deep changes are observed in the market of rail transportation. Lithuanian Railways has suspended the lease of platform cars to Russian and Belarusian customers, including platform cars that cannot be transported to Russia or Belarus, and transit to other eastern countries except

Latvia and Estonia. In response, Russia blocks the shipment of freight wagons from "unfriendly" countries that impose sanctions against it. As a result of the war in Ukraine, the structure of the leading players in the container transportation market is also changing. Thus, due to EU and US sanctions in response to the Russian invasion, the French logistics group Gefco, a controlling stake (75%) of which belong to Russian Railways and 25% to the Italian-French-American carmaker Stellantis, will be absorbed by French container operator CMA CGM [12].

On March 23, 2022, the Danish maritime container carrier Moller-Maersk, whose market share in Russian container traffic is about 30%, sold all its assets in Russia, stopped buying Russian oil for ships and accepted new orders for all its services - sea, transcontinental rail and aviation, to and from Russia [12]. Sanctions against Russia also apply to Russian transport and logistics companies. On the other hand, more and more large foreign logistics operators are terminating their cooperation with Russia, such as Maersk, DSV and DB Schenker.

The United States imposed sanctions against Gazprom, RusHydro and Transneft. At the same time, the issue of the EU's refusal from Russian energy (gas, oil and coal) and the search for other sources of supplies (in particular, the United States, Australia) was addressed. Italy signed an agreement on gas supplies from Algeria to reduce its dependence on Russian imports. All this together leads to a change in the geography of cargo flows, especially oil and gas.

The war in Ukraine, new sanctions and the related closure of airspace have led to longer transit times and an overall reduction in air traffic capacity. The world's leading transport and logistics companies are developing new additional routes connecting Europe and Asia. In particular, Dachser Air&Sea Logistics is launching an additional weekly charter flight from Frankfurt to Shanghai. The aircraft can carry 100 tons of cargo.

Changes in logistics routes are also associated with disruptions in the supply of some goods from Russia. For example, India decided to increase its imports of fertilizers from Canada and Israel in order to supply agricultural sector, which accounts for 15% of the economy and 60% of the employed population [12]. There is also a need to build new logistics routes for the transportation of goods from Ukraine to Europe by road and rail due to the fact that Russia blocks Ukrainian seaports and destroys airport. Cargo flows were redirected through the international railway crossings of Ukraine to the Republic of Poland, the Slovak Republic, Romania, Hungary and further to Western Europe.

The war in Ukraine has also caused a crisis in global supply chains. This is primarily about the automotive industry, as sanctions and blocked trade routes hinder the supply of cars and spare parts to and from Russia. Prior to the Russian aggression in February 2022, Ukraine had significant potential in the field of transport and logistics services, mainly due to the country's favorable geographical location, the availability of transport and logistics infrastructure, state programs to support transport development, Ukraine-EU Association Action Plan. In particular, Table 1 and Table 2 show the structure of the transport and logistics services market in Ukraine in terms of cargo transportation volumes, cargo turnover and their distribution by individual modes of transport in 2020.

As can be seen from Tables 1, 2, the largest share of cargo (75%) was transported by road. The geography of road transportation is showen in Fig. 3.

As can be seen from Fig. 3, the largest share of cargo transportation was carried out in Dnipropetrovsk, Poltava, Donetsk, Kyiv regions and the city of Kyiv. As a result of hostilities, the road transport infrastructure in Donetsk and Kyiv regions was virtually destroyed.

The analysis of export-import of transport services is presented in Table 3.

Table 1

The volume of transportation and cargo turnover by certain modes of transport in Ukraine, 2020

Mode of Transport	Volume of Transportation		Cargo Turnover	
	thousand tons	%	billion tkm	%
Rail	305480	18.62	175.6	56.1
Sea	1812.2	0.11	1.5	0.5
River	3788.4	0.23	1.4	0.4
Road	1232392	75.10	65.1	20.8
Air	88.3	0.01	0.3	0.1
Pipeline	97464.7	5.94	69.3	22.1
Total	1641026	100	313.2	100.0

Source: Transport of Ukraine 2020, compiled by the authors

Table 2

Dynamics of the volume of transportation by certain modes of transport in Ukraine, 2018-2020

Mode of Transport	2018		2019		2020	
	thousand tons	%	thousand tons	%	thousand tons	%
Rail	322342.1	19.62	312939	19.82	305480	18.62
Sea	1892	0.12	2120.3	0.13	1812.2	0.11
River	3698	0.23	3990.2	0.25	3788.4	0.23
Road	1205531	73.37	1147050	72.65	1232392	75.10
Air	99.1	0.01	92.6	0.01	88.3	0.01
Pipeline	109418.2	6.66	112656	7.14	97464.7	5.94
Total	1642980	100.00	1578848	100	1641026	100

Source: Transport of Ukraine 2020, compiled by the authors

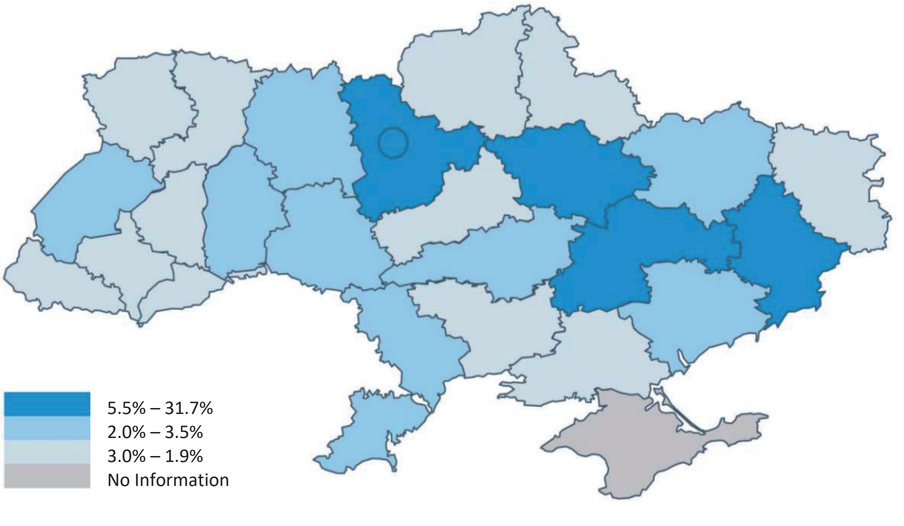

Fig 3. Distribution of cargo transportation by road, by regions of Ukraine, 2020
Source: Transport of Ukraine 2020.

According to Table 2, international traffic was dominated by pipeline, sea, air and rail services. Fig. 4 shows the average transportation distance of one ton of cargo by individual modes of transport in 2020, including international traffic.

Table 4 shows the results of financial activity in transport system of Ukraine in 2018-2022.

During the war in Ukraine, the situation on the market of transport and logistics services has changed dramatically. From the very beginning of the war, russian occupiers aimed to destroy the transport infrastructure. Ukrainian airports became the first targets of russian aggressors. As of April 11, 2022, the total infrastructure damage caused to Ukraine by the russian invasion was estimated at $ 119 billion, and the total amount of direct documented infrastructure damage reached $ 80.4 billion, according to the russia Will Pay project [1]. In particular, almost 8,000

Table 3

Exports and imports of transport and logistics services, 2020

Transport and Logistics Services	Exports		Imports	
	thousand $	%	thousand $	%
Maritime Transport Services	605952.9	13.11	309925.4	30.88
River Transport Services	25759.1	0.56	-	-
Air Transport Services	802191.7	17.36	319904.2	31.87
Rail Transport Services	405158.3	8.77	197393.3	19.67
Road Transport Services	339839.3	7.35	176500.4	17.58
Pipeline Transport Services	2443157.2	52.86	-	-
Other Ancillary and Additional Transport Services	320123.2	6.93	27625.2	2.75
TOTAL	4622058.50	100.00	1003723.30	100.00

Source: Transport of Ukraine 2020, compiled by the authors

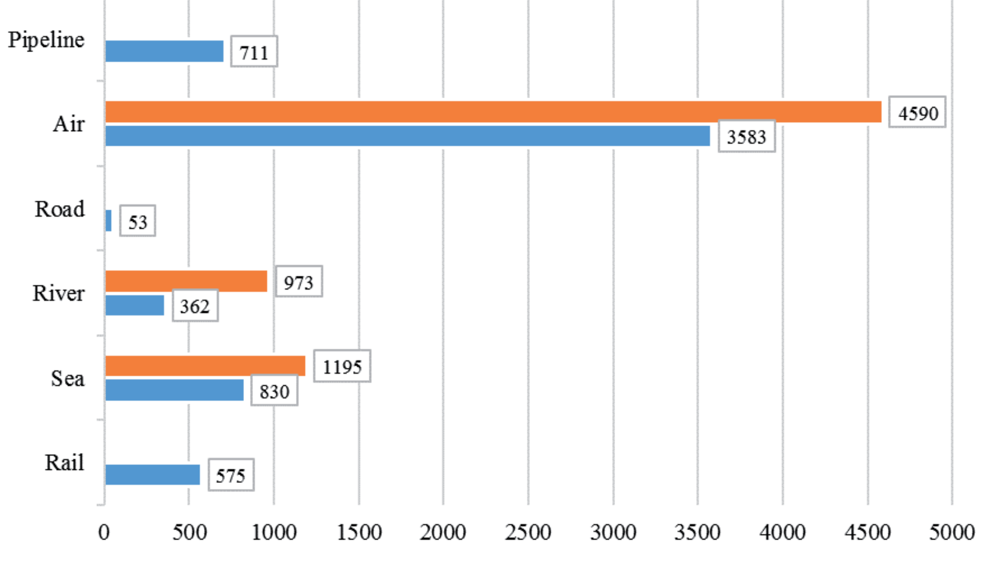

Fig. 4. Average transportation distance of one ton of cargo by individual modes of transport in 2020, km (blue area - for domestic transportation, orange area - for international transportation)

Source: Transport of Ukraine 2020, compiled by the authors

Table 4

Financial indicators of transport and logistics companies in Ukraine, 2018-2020

№	Financial indicators	2018	2019	2020
1.	*Financial results before taxation of enterprises by type of economic activity, mln. UAH*			
	Transport and storage, postal and ccourier activities	-22661.6	14414.8	17013.3
	including land and pipeline transport	-34503.7	-12585.3	24676.1
	including water transport	73.2	255.5	152.3
	including air transport	-1421.4	–	–
2.	*Profitable enterprises, % to the total number of enterprises*			
	Transport and storage, postal and courier activities	74.1	73.8	71.7
	including land and pipeline transport	77.5	77.7	75.3
	including water transport	53.6	66.7	56.5
	including air transport	68.5	–	–
3.	*Net profit (loss) of enterprises by certain types of economic activity, mln. UAH*			
	Transport and storage, postal and courier activities	-24265.4	8421.8	9054.8
	including land and pipeline transport	-32504.2	-14659.8	19373.6
	including water transport	54.3	213.4	125.4
	including air transport	-1722.8	–	–
4.	*The level of profitability (loss) of operating activities of enterprises, %*			
	Transport and storage, postal and courier activities	-1.6	4.1	4.4
	including land and pipeline transport	-9.7	-2.3	5.1
	including water transport	1.7	6.9	12.3
	including air transport	-2.6	–	–
5.	*The level of profitability (loss) of all activities of enterprises, %*			
	Transport and storage, postal and courier activities	-4.3	1.4	1.6
	including land and pipeline transport	-11.5	-5.0	7.1
	including water transport	1.6	5.6	3.0
	including air transport	-3.1	–	–

Source: Transport of Ukraine 2020, compiled by the authors

km of roads, dozens of railway stations, airports were destroyed and damaged, ports were blocked, supply chains broke. The air transportation market suffered significant losses. First, there are no flights by air, the world's largest transport aircraft of Ukrainian production AN-225 "Mriya" was destroyed.

As for the road transport market, its volumes prevail. Road transport is involved in the transportation of weapons and equipment for the Armed Forces of Ukraine, humanitarian goods and medicines for the population. In view of this, a number of countries, including Hungary, Austria, Italy, Lithuania, Latvia, Estonia, Bulgaria, Slovakia, Germany, Poland, Turkey, Moldova and Georgia, have relaxed rules for Ukrainian carriers on transit and all bilateral transport will operate without transport permits for the period of martial law [17]. However, in order to cross the territory of Hungary and be exempted from paying tolls while transporting humanitarian aid, the haulier must submit an application (Toll exemption request, in English or Hungarian) to the Office of the Deputy State Secretariat of the Ministry of the Interior of Hungary for Transport Registration.

On the other hand, due to the closure of transit through the territory of Belarus and Russia, as well as due to the increase in the volume of cargo transportation by road, the Ministry of Infrastructure simplified the rules for issuing permits for international cargo transportation [12]. Restrictions on the crossing of the border for male drivers were also lifted to ensure the transport of critical goods [18].

The next step of the Ministry of Infrastructure in the road transport market was to simplify the procedure for obtaining a license for:

- domestic transportation of passengers by buses;
- domestic transportation of dangerous goods and hazardous waste by trucks;
- international transportation of passengers by buses;
- international transportation of dangerous goods and hazardous waste by trucks;
- international transportation of goods by trucks (except for transportation of dangerous goods and hazardous waste).

Thus, for all types of licenses, the number of required documents was halved; the need to confirm three years of work experience was abolished; the submission of documents on the availability of material and technical base and the availability of contracts was canceled. For the period of martial law, the term of consideration of the application for a license under the new procedure was reduced from 10 days to 1-3 days [19]. Ukraine's rail transport also plays a key role in passenger and cargo transportation. OJSC Ukrainian Railways (Ukrzaliznytsia) took on a new key role in evacuating the population from the war zone and Russian-occupied settlements. As of April 9, 2022, Ukrzaliznytsia evacuated 3.5 million people since the start of the full-scale Russian invasion. At the same time, more than 470 thousand will be transported by train abroad [20].

The management of Ukrzaliznytsia decided to confiscate 15,000 freight wagons belonging to Russian companies (including VEB-Leasing, VTB Leasing, Gazpromtrans, SberbankLeasing) and standing on the tracks of Ukraine. Ukraine also confiscated Belarusian freight wagons that transported export goods in transit to Ukrainian ports. This will partially replenish the wagon park of domestic rail transport, which also suffered significant losses due to shelling and bombing.

The Government of Ukraine is promptly implementing measures to ensure "Wartime Logistics", which provides for the stable operation of new logistics routes. In particular, in order to ensure the possibility of further entry of ships in the conditions of military aggression in the ports of Ukraine in the Danube region and in order to stabilize the situation of transportation by rail, provide guarantees for shipowners, railway carriers and insurance companies on March 30, 2022, the Government issued an order No. 255-r 'Some issues ensuring the safety of navigation in the waters of Ukrainian ports in the Danube region and transportation by rail' [21]. The order provides for the allocation of funds from the reserve fund of the state budget to compensate for damage caused by the armed aggression of the Russian Federation against Ukraine and hostilities in Ukraine, and in case of refusal of insurers to provide insurance coverage.

Reimbursement is provided for charterers, operators and/or owners of seagoing and inland waterway vessels flying under the flag of Ukraine and under the flags of foreign countries - in case of such vessels in the waters of Ukrainian ports in the Danube region, as well as for owners and/or operators of the warehouse admitted to circulation by railways of the European standard - in case of stay of such rolling stock in the territory of Ukraine. A number of international companies provide assistance to Ukraine, including large logistics operators. In particular, in March 2022, the Kuehne+Nagel Group decided to provide immediate assistance to Ukraine in the amount of 10 million Swiss francs (9.8 million euros) in the form of free logistics services for organizations involved in providing assistance to Ukraine. By the summer of 2022, the group will provide transportation and temporary storage of resources in Ukraine, Poland, Slovakia, Hungary and Romania [12].

Ensuring the financial stability and competitiveness of transport and logistics companies

It should be noted that the russian-Ukrainian war raised the issue of ensuring the competitiveness of enterprises. Competitiveness is a complex, systematic characteristic of the enterprise. In our opinion, the main factors of competitiveness of the transport and logistics enterprise in the conditions of war are:

1) safety and reliability of transportation;

2) staffing and provision;

3) effective and flexible management in the new environment;

4) the amount of costs for transport services;

5) quality and quantity of offered transportations / related services;

6) system of tariffs for transportation;

7) ensuring the continuity of export supplies;

8) availability of reserves to cover risks.

Additional factors that affect the competitiveness of transport and logistics companies are: regular availability, cost-effectiveness, availability of operational information, speed of response to consumer requests, innovation. Fig. 5 represents the process of forming the strategic competitiveness of the transport and logistics company in peacetime, aimed at expanding the market position of the company in a competitive market, efficient use of its resources and obtaining moderate risk of profit in the amount not less than the industry. In the fourth paradigm of competitiveness, the main criterion for the success of the company in peacetime was the ability to find the shortest way to solve the problem to meet consumer needs.

In the conditions of military actions, the formation of stability of the enterprise acquires, first of all, key value. Therefore, the formation of the strategic competitiveness of the transport and logistics company should begin with goal setting (defining the mission, vision and main purpose of the company in the market of transport and logistics services); development of a general plan taking into account risks and threats in wartime; preparation of the enterprise for activity in the conditions of war and systematic application of measures for anticipation and reduction of negative influences and consequences on the enterprise. Fig.6 represents formation of a strategy for the competitiveness of a transport and logistics company in wartime conditions.

In peacetime the formation of a competitiveness strategy of a transport and logistics company covers three main stages: SWOT analysis and assessment of the impact of macro - and micro-environmental factors on the activities of the transport and logistics company; analysis of strategic alternatives. In wartime conditions, the formation of competitiveness should be complemented by the stage of preliminary strategic intelligence and monitoring, as well as strategic planning and forecasting; establishing strategic ties and channels both within the structural units of the enterprise and external strategic ties and channels.

In the context of hostilities, it is important to create a single strategic management center (SCM) of the enterprise and a crisis center, which would quickly make decisions and provide a rapid and effective response to threats to the enterprise.

At the first stage, goal-setting is carried out for the transport and logistics company, adjusting its mission and purpose in war. At the second stage, a single strategic enterprise management center and a crisis center are being created for end-to-end and continuous monitoring of the situation in the industry, in the market of transport and logistics services, and for tracking changes occurring nationally and globally through hostilities. To ensure a single strategic center for the management of reliable and operational data, it is necessary to conduct preliminary strategic intelligence and market monitoring, which can be performed by the security service of the enterprise. This stage also includes an assessment of the impact of macro factors- and microenvironment for the activities of the transport and logistics company, in particular: political and legal factors, military, economic, natural, scientific and technical factors. In the context of digitalization of the economy it is important to protect the enterprise from cyber-attacks [22; 23; 24].

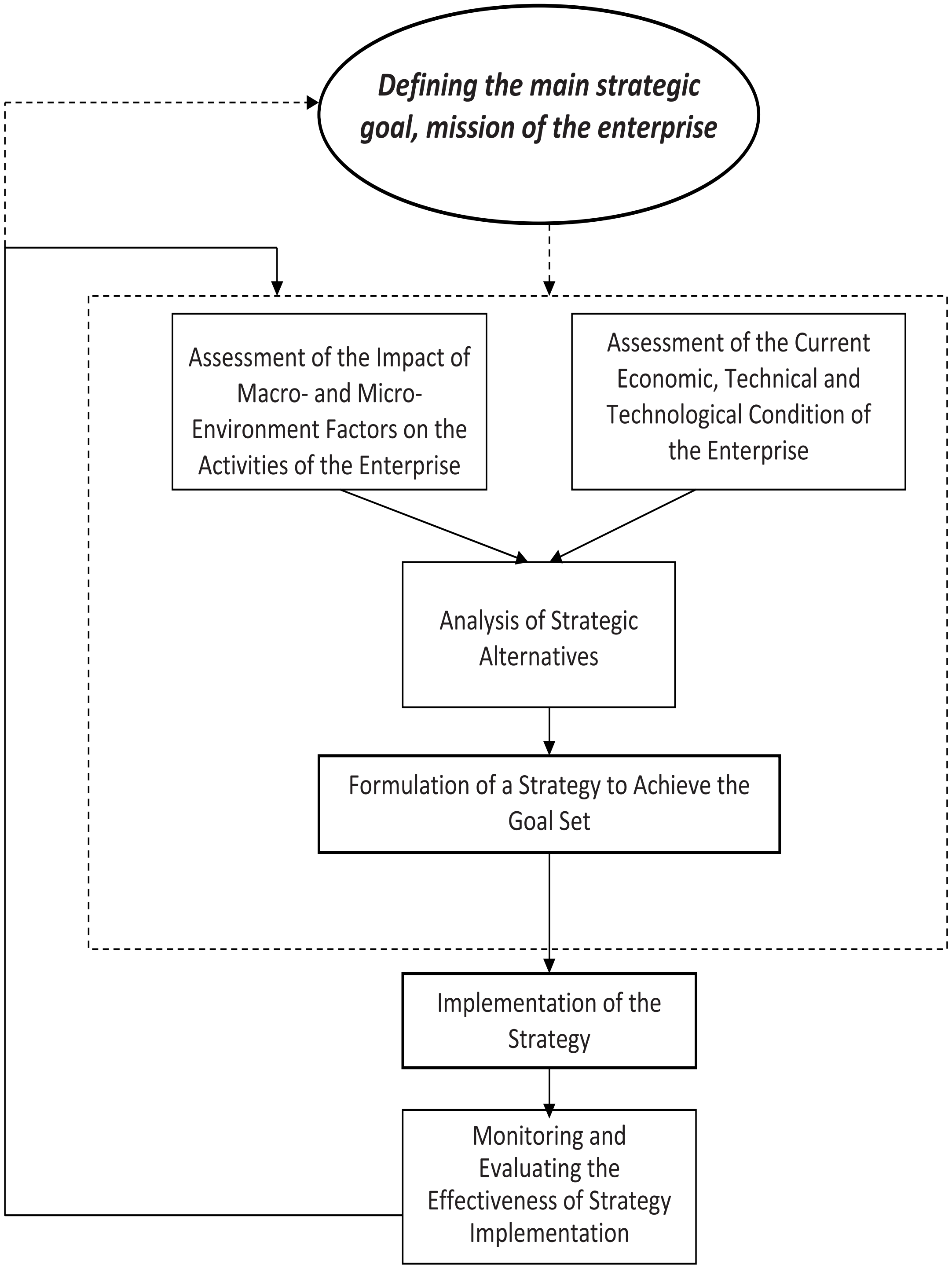

Fig. 5. The Process of forming strategic competitiveness in a transport and logistics company
Source: compiled by the authors after Khrapkina, V. (2020), Bogatska, N. (2020).

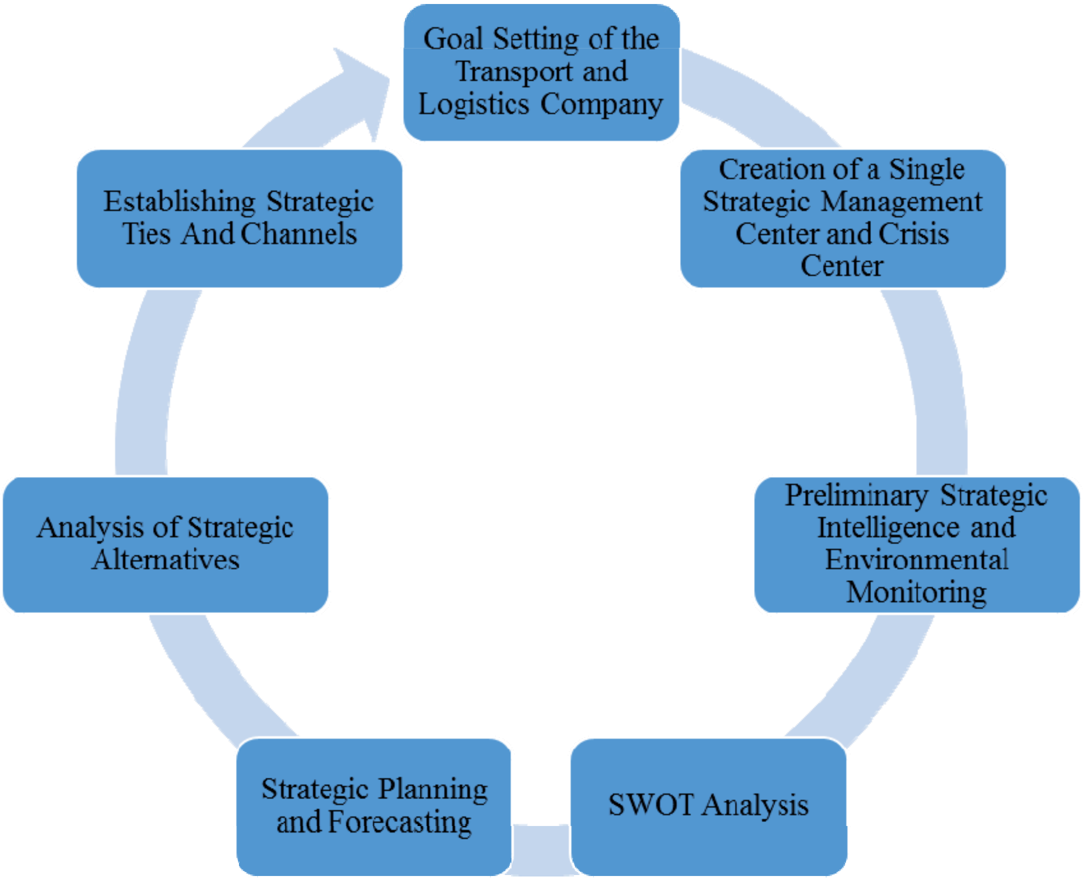

Fig. 6. Formation of a strategy for the competitiveness of a transport and logistics company in wartime
Source: Own elaboration

The next step is SWOT analysis of strengths and weaknesses of the enterprise; the type of market and the nature of competitive relations inherent in the market are determined. At this stage, the motivation of customers, the peculiarities of their economic decisions, etc. are studied. Then strategic planning and forecasting is carried out; analysis of strategic alternatives, the choice of market strategy and competitive strategy of the transport company, taking into account plans and forecasts of events for a particular transport and logistics company, and the market and the economy as a whole. An important component of the formation of the competitiveness strategy of the transport and logistics company is the establishment of effective strategic ties and channels both within the structural units of the company and the formation of external strategic ties and channels. At the final stage, based on the analysis of the information collected in the previous stages, the strategy of achieving the goal of the transport company is determined.

The management process involves the implementation of the strategy of competitiveness of a transport and logistics company, includes processes: planning, creation of appropriate organizational structures for the management of the PSC of the transport company, control and evaluation of the effectiveness of the strategy. The foundation for the formation of strategic competitiveness of the enterprise is to ensure the competitiveness of the service provided by this enterprise.

In conditions of intensifying competition, the formation of competitive advantages and ensuring the competitiveness of transport and logistics services are priorities for transport and logistics companies. Under the competitiveness of transport and logistics services, we understand their properties, which are manifested in the ability to be sold in a certain market at a certain price at a certain time. The main parameters that determine the competitiveness of transport and logistics services are the complex parameters of quality, price and compliance of the product with certain standards [25; 26].

Qualitative parameters of transport and logistics services include a set of their properties and characteristics that allow to meet the needs of consumers in the process of offering and consuming these services. The key indicators of the quality of transport and logistics services to consumer enterprises include:

- Time from receipt of the application for transportation to delivery;
- Reliability and possibility of delivery on demand;
- Availability of stocks, stability of supply;
- Safety of goods during transportation and loading and unloading operations;
- Timeliness of supply of rolling stock for cargo operations;
- Completeness and degree of availability of the order;
- Convenience of placement and order confirmation;
- Objectivity of tariffs and regularity of information on maintenance costs;
-The possibility of providing loans;
- Efficiency of cargo handling in warehouses;
- Quality of packing, and also possibility of package and container transportations.

An influential factor in the competitiveness of transport and logistics services is also a fairly low price, i.e. the size of the tariff for transportation. The price parameter can be estimated using the following indicators:

- The ratio of the level of the offered price and the reference service;
- Cost of additional services;
- Attractiveness of the price discount system for the consumer;
- Terms of payment.

The structure of the assessment of the level of competitiveness of the transport and logistics company can be represented in the form of a diagram (Fig. 7).

In wartime, a company should focus not so much on increasing and increasing market share, but on maintaining its position. In this aspect, the end-to-end monitoring of the financial performance of the transport and logistics company plays an important role. Assessment of the level of the financial component of the logistics company is based on the analysis of the balance sheet and cash flow of the enterprise. These are the following coefficients:

$$\text{(a) Coefficient of Financial Autonomy} = \frac{\text{Equity}}{\text{Company Assets}};$$

$$\text{(b) Coefficient of Financial Dependence} = \frac{\text{Company Assets}}{\text{Equity}};$$

$$\text{(c) Financial Risk Ratio} = \frac{\text{Borrowed Capital}}{\text{Equity}};$$

$$\text{(d) Financial Stability Ratio} = \frac{\text{Equity + Long−term Liabilities}}{\text{Liabilities of the Company}};$$

$$\text{(e) Liquidity Solvency Ratio} = \frac{\text{Current Assets + Deferred Expenses}}{\text{Long−term and Current Liabilities + Deferred Income}}.$$

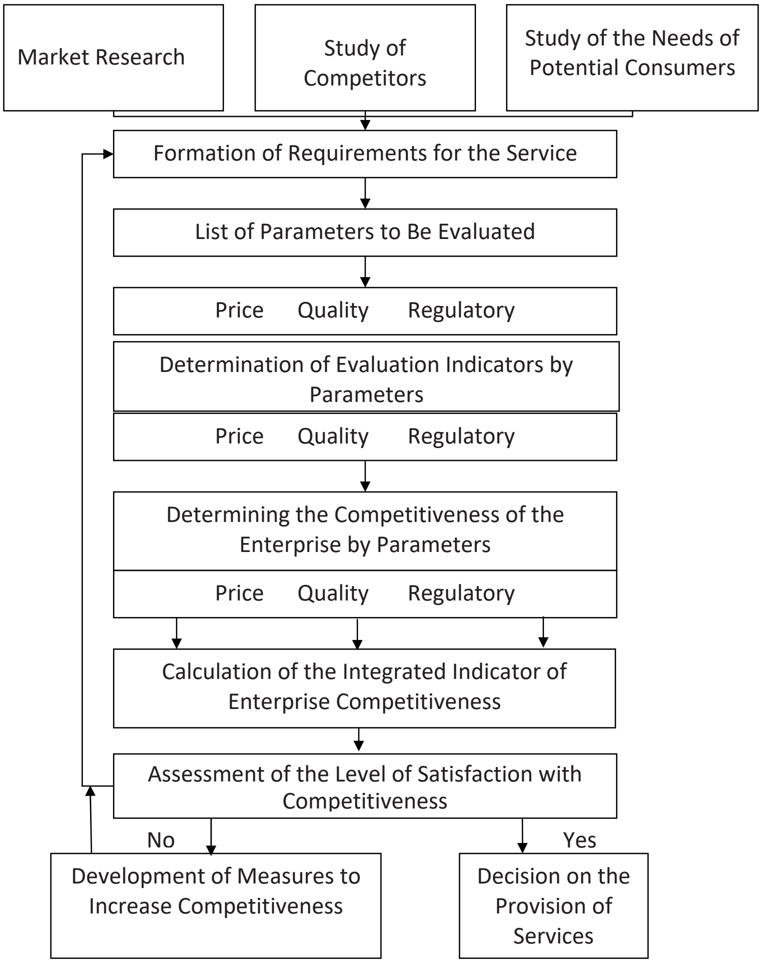

Fig. 7. Assesment of the level of competitiveness of a transport and logistics company
Source: Own elaboration

They show the ability of companies to cover their liabilities at their own expense. In particular, the decrease in the coefficient of financial autonomy indicates an increased risk of financial difficulties for the company in the future and is a negative signal to creditors. The coefficient of financial dependence actually complements the previous figure. The normal limit of this indicator is considered to be ≤ 1.

The long-term financial independence ratio is calculated as the ratio of equity and debt to the total balance sheet currency. A condition is considered normal when this coefficient is > 1. The liquidity solvency ratio is defined as the ratio of total current assets to total financial and current liabilities, its regulatory value is 1. Stable financial condition is characterized by no defaults, normal profitable work, no significant violations of internal and external financial discipline for several years, has a positive effect on the efficiency of the logistics company. Conversely, the presence of violations of financial discipline, problems in the receipt of funds on the current account due to inefficient management of receivables, non-fulfillment of the financial plan leads to a decrease in the efficiency of these enterprises in the market [27; 28; 29].

Let's calculate such indicators for Ukrainian transport and logistics company "TRANS LOGISTICS" (2008), which provides domestic and international cargo transportation by road (table 5).

Table 5

Financial indicators of "TRANS LOGISTICS", 2018-2020

№	Financial indicators	Normative Value	2018	2019	2020	I quarter 2021
1	Coefficient of Financial Autonomy	> 0.5	0.444548	0.407022	0.434789	0.435037
2	Coefficient of Financial Dependence	≤ 0.5	2.249476	2.456867	2.299966	2.298655
3	Financial Risk Ratio	< 0.25	1.249476	1.456867	1.299966	1.298655
4	Financial Stability Ratio	> 1	0.901638	0.870452	0.853084	0.825832
5	Liquidity Solvency Ratio	1	0.438586	0.406708	0.450182	0.203425

Source: Financial Reports of "TRANS LOGISTICS" [https://translogistic.ua/company/reports], compiled by the authors

As we can see, the company has some problems with the financial stability. All calculated coefficients do not meet normative values. The Russian-Ukrainian war has led to the crisis of non-payment due to inflation, depreciation of national currency, breaks in economic links, destroyed road infrastructure. Unfortunately, the impact of the war on the company's financial condition cannot be assessed, as at the beginning of the war the Ukrainian government abolished the mandatory requirement for companies to report.

Since the level of competitiveness of an enterprise (CP) can be determined by comparing the services it provides with analogues of competitors, as well as by determining differences in the degree of its compliance with social needs, the process of forming CE should begin with analysis of transport and logistics services, where the implementation of the service is planned in the future [30].

The next step is to study the real and potential demand, determine the main characteristics and requirements for transport and logistics services offered by a particular transport and logistics company, and analyze the supply of competitors of the company. This is a rather time consuming and difficult process. To save time and resources, a researcher can use the express analysis method to identify promising transport and logistics services among alternatives.

Since the CE of the transport and logistics company is an integrated indicator, the total useful effect of the company is calculated, the total costs are determined at the appropriate stages of the life cycle of the company, including costs to eliminate negative consequences of negative effects and risks that may arise during operation.

Conclusions.

The Russian-Ukrainian war radically changed both the international market of transport and logistics services and the national market of Ukraine. The paper thoroughly analyzes the main factors that affected the market before February 24, 2022 and after that date. In particular, among the main factors determining the market situation until February 24, 2022 are the following: development of transport infrastructure, optimization of supply chains, expanding the range of goods and geography of transportation under the influence of globalization, global pandemic COVID-19 in 2020-2021. The main factors affecting the functioning of the international market of transport and logistics services after February 24 include: the impact of international sanctions, which not only changed the structure and geography of cargo flows, but also affected changes in the composition of major market players; destruction of Ukraine's transport infrastructure as a transit state, Russia's blockade of Ukrainian seaports and destruction of airports; simultaneous growth of the flow of humanitarian goods to Ukraine; weakening in the EU countries the regime of work and rest of drivers transporting humanitarian goods to Ukraine; increasing the burden on market players due to the closure of airspace for Russia. Insolvency of regional and international organizations to respond to the global challenges of wartime indicates the urgent need to reorganize them, which is also emphasized in the work.

The authors conducted a study of the impact of the Russian-Ukrainian war on national market of transport and logistics services in Ukraine. It is determined that before the Russian aggression in February 2022 Ukraine had significant potential in the field of transport and logistics services, primarily due to the favorable geographical location of the country, the availability of transport and logistics infrastructure, state programs to support the development of the transport complex, EU-Ukraine Association Action Plan. According to the statistical data presented in the work, in the domestic market the largest share of goods in Ukraine was transported by road. International services were dominated by pipeline, sea, air and rail services. Due to the war in Ukraine, the situation on the market of transport and logistics services has changed dramatically. Since the invasion, the actions of the Russian invaders have been aimed at destroying Ukraine's transport infrastructure. Due to hostilities and missile strikes, almost thousands of kilometers of highways, dozens of bridges, railway stations, airports were destroyed and damaged, and Ukrainian ports were blocked. With the increase in the flow of weapons, military and humanitarian goods, problems with the supply of fuel and lubricants due to the destruction of oil depots and warehouses, began failures in supply chains. The air transport market has suffered the most, due to the threat of missile strikes, the destruction of airports and aircraft, in fact, no flights are operated by air. Maritime transport is also virtually inoperable due to the Russian blockade of Ukrainian ports. All loads fall on road and rail transport, which play a key role in ensuring passenger and cargo transportation. The Government of Ukraine is promptly implementing measures within the framework of the Wartime Logistics Program, which it envisages ensuring stable operation of the transport system and opening new logistics routes. In order to stabilize the situation with transportation and to provide guarantees for transport owners, the government provides funds from the reserve of the state budget to compensate for damage caused by the armed aggression of the Russian Federation against Ukraine and hostilities in Ukraine, and in case of refusal to provide insurance coverage. As practice shows, international governments and companies, including large logistics operators, provide significant support and assistance to Ukraine.

The Russian-Ukrainian war raised the issue of ensuring the competitiveness of transport and logistics companies, as their effective activities largely depend on the economic and military security of the country. To confirm the scientific hypothesis, the paper analyzed in detail the changes that have occurred at both micro and macro levels in the field of transport and logistics services.

In our opinion, the main factors of competitiveness of the transport and logistics enterprise in the conditions of war are: safety and reliability of transportations; staffing and provision; effective and flexible management in new conditions; the amount of costs for transport services; quality and quantity of offered transportations/related services; system of tariffs for transportation; ensuring the continuity of export supplies; availability of reserves to cover risks. Additional factors that affect the competitiveness of transport and logistics companies are: regularity, availability, cost-effectiveness, availability of operational information, speed of response to consumer requests.

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ENSURING THE COMPETITIVENESS AND FINANCIAL STABILITY OF TRANSPORT AND LOGISTICS COMPANIES IN CONDITIONS OF RUSSIAN-UKRAINIAN WAR

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The work is devoted to the study of the development of both international and Ukrainian markets of transport and logistics services and the analysis of new trends formed during the russian-Ukrainian war. Military actions and missile attacks have led to a humanitarian disaster in Ukraine, destroyed the Ukrainian economy, business and infrastructure. The russian-Ukrainian war painfully affects the entire

world economy every day, poses new difficult challenges for global markets, including the market of transport and logistics services. The russian invasion of Ukraine radically changed the trends in the international market of transport and logistics services. Until February 24, 2022, the main factors affecting the market were: the development of transport infrastructure, optimization of supply chains, expansion of the nomenclature (assortment) of cargo and the geography of transportation under the influence of the globalization of the world economy, the global pandemic of COVID-19. The russian-Ukrainian war defined new trends for the international transport and logistics market. As a result of hostilities, the transport infrastructure of Ukraine as a transit state is being destroyed on a daily basis. Due to the introduction of international sanctions against russia and belarus, there have been significant changes in the market of air, sea, road and rail transportation, including container transportation. The structure and geography of cargo flows, as well as the composition of the main market actors, have changed. Due to the violation of international norms and rules, the problem of restructuring of regional and international governmental organizations that regulate the market of transport and logistics services has arisen. First of all, it is about the exclusion of Russia from international organizations. Due to the introduction of sanctions against Russia, international logistics has undergone significant changes, freight flows have changed. Ukraine and other countries had to build new logistics routes, which significantly increased the time and cost of freight transportation. In such difficult conditions, the issue of the survival of transport and logistics enterprises, ensuring their competitiveness and sustainability in the modern world is acute. Tectonic shifts in the market of transport and logistics services encourage enterprises to search for new business models, strategies that would allow to form competitive advantages of a fundamentally new level. The article represents a comparative analysis of the process of forming a competitiveness strategy of a transport and logistics company in peacetime and wartime conditions. The authors emphasize that in wartime, the company should aim not so much at increasing market share, but at preserving its positions. In this aspect, end-to-end monitoring of the financial activities of the transport and logistics company plays an important role.

The authors identify seven main stages of formation of the strategy of competitiveness of the transport and logistics company in wartime, which are analyzed in detail in the work. The paper also emphasizes that the main parameters that determine the competitiveness of transport and logistics services are complex parameters of quality, price and compliance of the product with certain standards. The analysis has identified key evaluation indicators for each of the above parameters. The conclusions of the authors are illustrated by the scheme of ensuring the competitiveness of a transport and logistics company. Thus, ensuring competitiveness is a complex mechanism of interaction of a transport and logistics company with other market subjects, the formation of competitive advantages and ensuring financial stability, differentiated by time, manifestation, structure and is the basis for determining the efficiency of a transport and logistics company and its real competitive position on the market.

A promising area of research is the development of measures and tools to ensure the efficiency of transport and logistics companies by identifying and implementing their key competitive advantages in military conditions, the formation of alternative strategies for competitiveness.

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