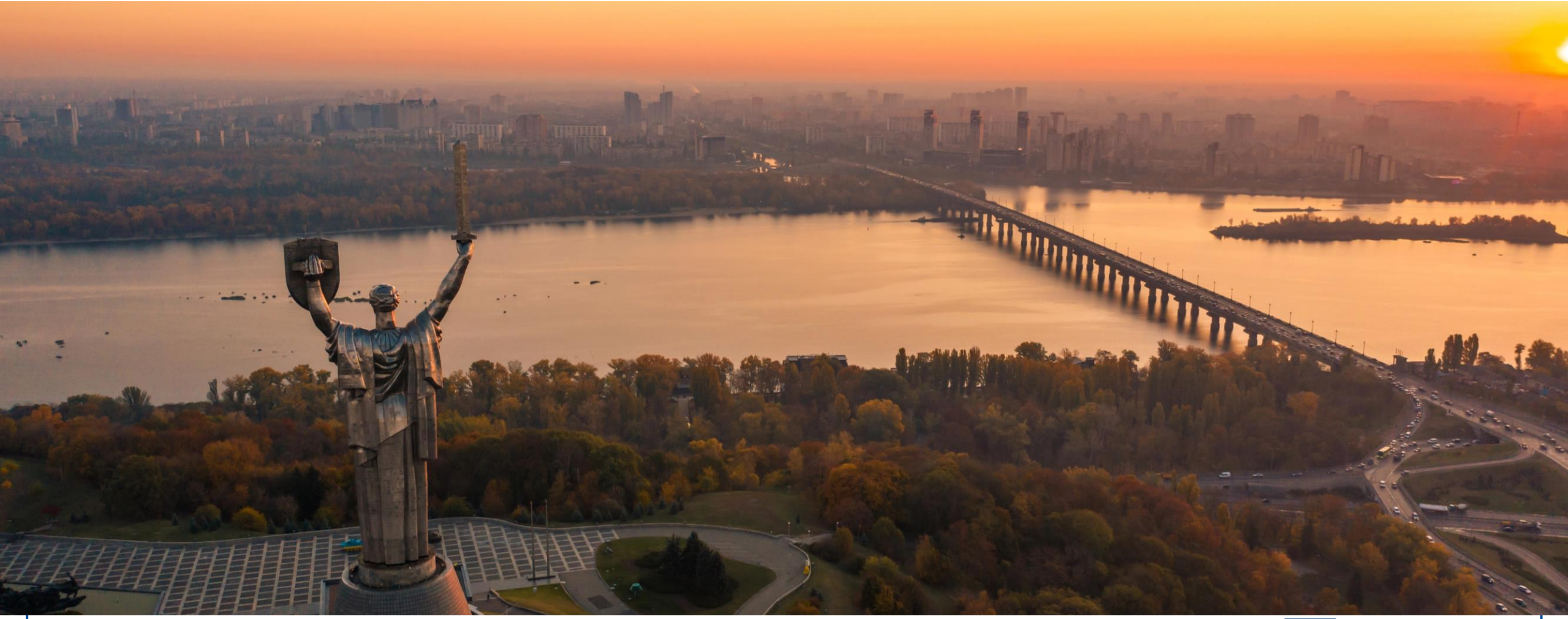

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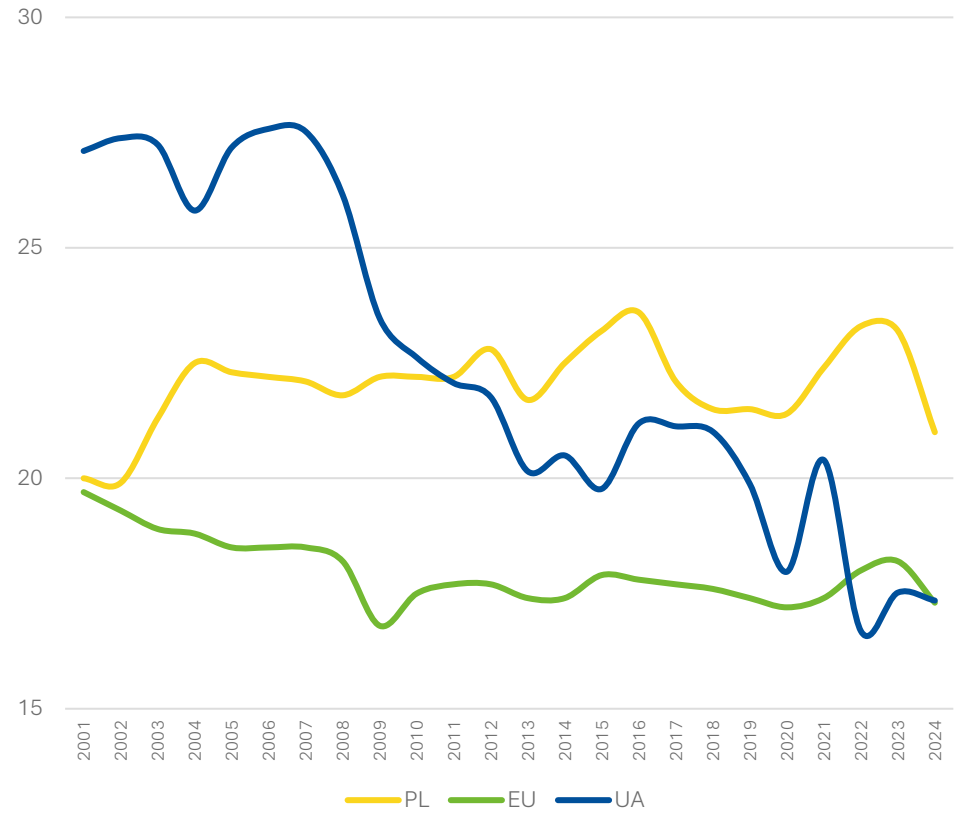
Industrial integration in the EU accession context: lessons from Poland, opportunities for Ukraine

Poland and Ukraine: from neighbours to value chain partners

Strong industrial base + high-growth neighbour = foundation for cross-border value chains

GVA in industry, % of GDP



Source: the World Bank database, SSSU.

- **Poland is in the top tier of EU performers:** from 2000 to 2024, its industrial production grew on average ~5% annually, one of the fastest rates in the EU.
- Poland's total exports reached ~$380 bn (2024), and manufacturing (machinery, vehicles, electronics) is the export engine behind that figure.
- Polish exports of electrical & electronic equipment worth ~$44 bn in 2024: country is moving up the value chain.
- Ukraine's industry has averaged ~1% annual growth in 2000-2024.
- **Structural rebound potential:** Despite long-term contraction, Ukraine's industry demonstrates rapid recovery capacity during periods without shocks. Reforms + EU accession can unlock growth potential.
- **Strategic complementarity:** Ukraine provides industrial scale, raw materials, energy-intensive production, while Poland offers EU market access, logistics, clusters and investment incentives.

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Lessons from Poland

Attracting investment, modernising industry & building ecosystems

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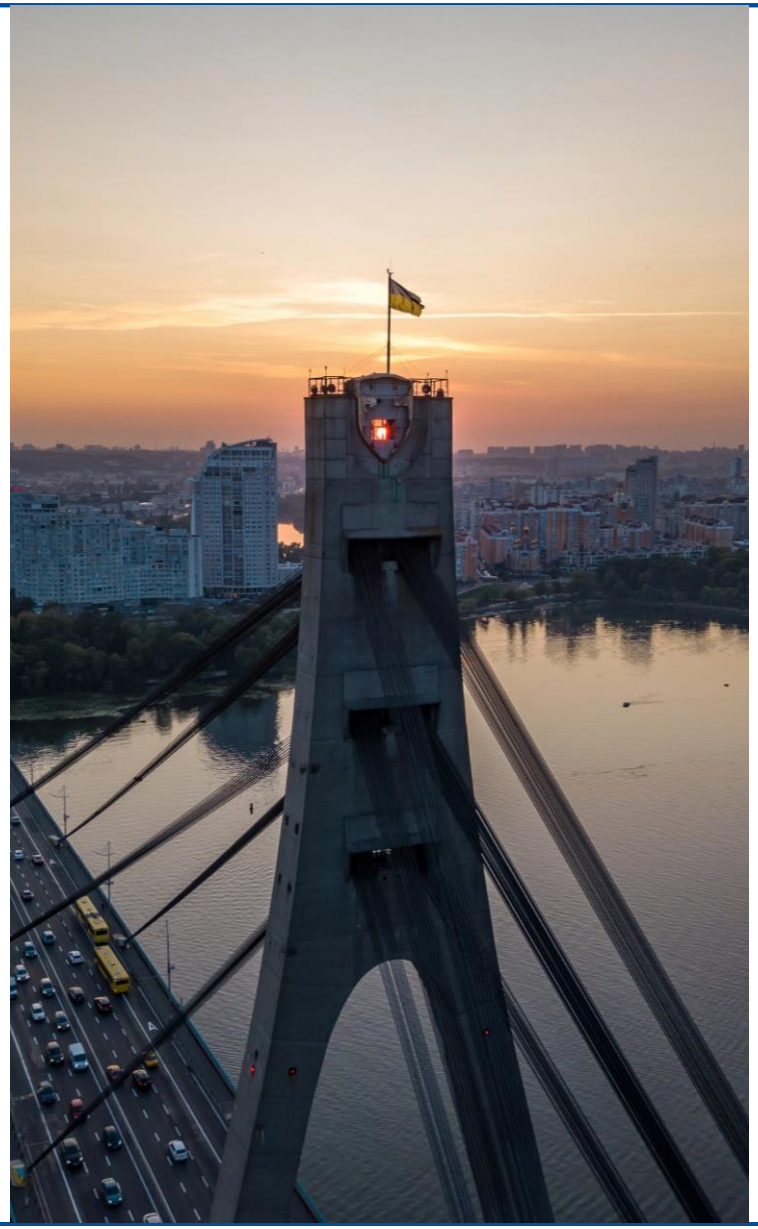
Coordinating incentives, institutions, and regions to build a modern industrial base

How Poland did it:

- Combined state aid, targeted investment programmes, and tax incentives to attract large-scale manufacturing and R&D projects.
- Reformed Special Economic Zones into a nationwide Polish Investment Zone (2018), extending tax breaks and adding qualitative criteria like R&D and sustainability.
- Supported significant investments (2011–2030) through cash grants tied to project size, region, and job creation.
- Developed a dense network of industrial and technology parks offering ready infrastructure and SME–FDI linkages.
- Built strong institutions (PAIH, PARP, and BGK) to connect investors with SMEs, finance, and innovation.
- Encouraged cluster-based cooperation between firms, universities, and regions, evolving from hard infrastructure and tax reliefs toward R&D, green transition, and smart specialisation after 2014.

CENTRE FOR ECONOMIC STRATEGY



Polish-Ukrainian industrial clusters

Building Poland–Ukraine industrial clusters for reconstruction

CENTRE FOR ECONOMIC STRATEGY

Poland provides EU access and logistics; Ukraine offers industrial scale and reconstruction demand.

Key drivers:

- Demand × capacity: Ukraine's rebuilding creates lasting demand for machinery and materials - export potential for Poland.
- Logistics: Polish ports and railways already serve as Ukraine's EU gateway, forming natural cluster corridors.
- Investment integration: Poland shows how to embed foreign investors into local supply chains through parks and matchmaking.

Next steps:

- Strategic alignment: Create a joint UA–PL Cluster Framework tied to EU instruments (Interreg NEXT, CEF, InvestEU).
- Blended finance: Launch binational funds or risk-sharing tools for shared R&D and harmonised standards.
- Skills: Develop bilingual training to match workforce skills with cluster needs.
- Integrated logistics: Advance transportation corridors under TEN-T and Solidarity Lanes.

Thank you!

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