Online Discussion: "New Routes of Europe. Poland and Ukraine Between Logistics and Politics" January 29, 2026

The online discussion, jointly organized by the Warsaw Enterprise Institute (WEI, Poland) and the Institute for Economic Research and Policy Consulting (Ukraine), is part of a series of events within the framework of the *project "A Common Future. Poland and Ukraine in the European Single Market"*. The discussion focused on how transport corridors and the rules of the game between Ukraine and the EU are changing in the context of European integration: what actually works in rail and multimodal logistics, where the "bottlenecks" are (infrastructure, regulatory, political), and what solutions can strengthen the competitiveness of Ukraine and Poland in the European logistics system.

The debate brought together representatives from the analytical community, railway and logistics businesses from Poland and Ukraine:

- **Sebastian Stodolak** – Vice President of the Warsaw Enterprise Institute (WEI);
- **Sandra Baniak-Stachowiak** – transport sector analyst at the Centre for Eastern Studies (OSW);
- **Valerii Tkachov** – Deputy Director of the Department of Transportation Technology and Commercial Operations at Ukrzaliznytsia;
- **Jacek Rutkowski** – Director of Development and Management of Intermodal Companies at CLIP Group;
- **Oleksandr Tkachuk** – Director of Terminal Network Development at Levada Cargo;
- **Aleksandra Adamska-Ziętek** – Member of the Management Board for Trade and Operations at PKP LHS;
- **Serhii Vovk** – Director of the Centre for Transport Strategies.

The discussion was moderated by **Iryna Kosse**, Institute for Economic Research and Policy Consulting.

1. 2025 as a transition from "emergency" logistics to structural route reformatting

The discussion was opened by Sebastian Stodolak, Vice President of the Warsaw Enterprise Institute (WEI), noting that the conversation concerns very practical consequences of Ukraine's future EU membership and how Poland has already gone through similar conflicts between economy and regulation. As an example, he mentioned the "Mobility Package" and how strict requirements can drastically change operating conditions for transport companies. There is a risk of repeating an old scenario: Poland once protested against restrictions from the West, so it would be a mistake now to reproduce similar barriers toward Ukraine. WEI supports a free market and maximally open borders for goods, services, and mobility of people, but recognizes point tensions between Poland and Ukraine that need to be discussed calmly and substantively. Regulation in the EU can be a powerful tool for modernization, but if it does not take into account market realities and the cost structure of carriers, it becomes a source of conflicts and distortions. The discussion unfolded from this logic: "integration is not only infrastructure, but also rules."

Sandra Baniak-Stachowiak (OSW) emphasized that in 2025, quiet but fundamental changes occurred not only at the border but also in rear infrastructure: the number of terminals and transshipment points rapidly grew, becoming a response to route restructuring after the full-scale war began and the development of "Solidarity Corridors." She also noted the growing interest of major international players in Ukraine (particularly mentioning MSC/Medlog and their investment steps), which is important as a signal of Ukraine's long-term integration into European supply chains. She highlighted the container segment as a separate topic: the strengthening role of the Baltic hub in the port of Gdansk and its importance for the Ukrainian container market. She also emphasized the trend of growing intermodal solutions in rail connections and that Ukrzaliznytsia began more actively entering the Polish market as a key external direction.

2. **Railway perspective: numbers, flow structure, and fast processes at the junction**

Valerii Tkachov (Ukrzaliznytsia) provided baseline figures for transportation across the Polish-Ukrainian railway border in 2025: overall volumes decreased, and he directly linked this to the restoration of Greater Odesa ports operations – a significant portion of export flows returned to the maritime direction, while western crossings are losing share in grain and part of other nomenclature. Against this background, however, he noted several positive shifts.

First, the launch and operation of UZ Cargo Poland as a UZ subsidiary in Warsaw became a tool for approaching the EU market and expanding the range of logistics services. Second, there was a sharp increase in petroleum product imports through Poland as a critically important fuel supply channel for Ukraine. Mr. Valerii separately emphasized the role of two railway junctions (Yahodin and Mostyska) in this import. Third, infrastructure projects started with CEF (Connecting Europe Facility) involvement, including modernization and electrification initiatives on directions that strengthen the corridors.

Among negatives, Mr. Tkachov named two "chronic" political-economic problems: tensions around agricultural products (position of Polish farmers) and competition in the road transport market. As an example of a short-term security shock, he mentioned the restrictive regime (after incidents on Polish railways) that temporarily affected hazardous cargo transportation but was later neutralized through coordination with the Polish side.

3. **Intermodal and terminals: where growth is and where problems are**

Jacek Rutkowski (CLIP Group) spoke about intermodal transport through the lens of investment and terminal capacity: demand and potential exist, but the "bottleneck" is not only in the track or locomotive but in terminals, process integration, and transit predictability. He mentioned his own investment plans and projects, emphasizing that the development of European gauge in Ukraine (1435) is an important signal, but it should produce practical results only with a cargo base, transparent rules, and technologically coordinated chains from Ukrainian dispatch points to European hubs.

Oleksandr Tkachuk (Levada Cargo) emphasized the value of transit as an economic model: transit flows provide higher margins and should be a strategic goal for both countries. His thesis was that Poland and Ukraine have already become partners in new logistics routes, but a real breakthrough depends on the regulatory framework, procedures, and the ability to reduce delays at borders and in related operations.

4. Polish railway perspective: transit, inspections, consultative support

Aleksandra Adamska-Ziętek (PKP LHS) noted the growth of intermodal transport from Ukraine through Poland while raising the practical question of this growth's quality: what is targeted transportation versus transit, and where exactly does the delay occur. She also mentioned changes in nomenclature (particularly coking coal to Ukraine) as a reflection of wartime economy.

She identified the key barrier as the inability to freely deploy transit due to large-scale border inspections and control procedures. At the same time, Ms. Aleksandra proposed a pragmatic cooperation framework: Poland, as a country that has already gone through the integration path, can provide Ukraine with consultative support on implementing EU rules and procedures, but this should be tied to specific bottlenecks rather than general declarations.

5. Strategic framework: not closing 1520 and thinking in corridors that bypass Russia/Belarus

Serhii Vovk (CTS) emphasized the strategic dimension: it is critically important for Ukraine to keep the "western gates" of the transport system as open as possible because routes and risks change very quickly. He insisted that integration should not mean abandoning the existing broad gauge 1520; on the contrary, it is advisable to preserve existing infrastructure in parallel with the development of European gauge so as not to lose capacity and flexibility.

He also brought the discussion to the level of geopolitical logistics: the region's current basic routes historically passed through Russia and Belarus, and in the long term, this is a toxic dependency. Accordingly, alternative transit corridors are needed where Poland and Ukraine can be the core of a new "east-west and north-south" connection. But this requires coordinated rules, investment decisions, and speed standards (predictability, windows in ports and hubs, data synchronization).

6. European integration as infrastructure + legislation + risks (security, CBAM)

In the second part of the discussion, Valerii Tkachov (UZ) expanded the focus from operational matters to the integration "roadmap": Ukraine is officially included in the updated TEN-T network and operates in the corridor logic, which opens access to financing instruments (CEF) and requires systematic planning (stages to 2030, 2040, and 2050, including large-scale development of the 1435 mm network). He also outlined two blocks of risks.

The first is security: attacks on infrastructure and even on rolling stock, which transforms logistics into a question of resilience, not just efficiency. The second is regulatory-economic: the EU's implementation of mechanisms like CBAM as a potential blow to Ukraine's export structure, where raw materials dominate. Hence his conclusion: Ukraine needs to simultaneously adapt its regulatory framework (including through laws such as interoperability) and think about changing its economic profile; otherwise, logistics will work on an old model that becomes more expensive and less competitive.

7. Key conclusions and recommendations

The discussion showed: Polish-Ukrainian logistics is already part of the European system – through fuel, grain, ore, containers, intermodal chains, and investments in terminals. But the main battle of 2026–2030 will not be fought over additional border crossings but over three things: (1) predictability and speed of processes at junctions (digitalization, control, transit rules), (2) investment and technical coordination of infrastructure (TEN-T/CEF, 1435 mm network and smart preservation of 1520 mm network), (3) depoliticization and risk management (agriculture and road carriers, security, new EU regulations like CBAM). Participants essentially agreed that Ukraine and Poland can either learn from conflicts (protests, blockades, mutual restrictions) or assemble a joint package of technological and procedural solutions that will produce measurable effects within a year and become the foundation for a longer investment trajectory.

Recommendations

1. Implement a "fast package" for the border: digital synchronization and predictability
The discussion repeatedly returned to one idea: speed is data and procedures. Coordinated digital solutions are needed (common data standards, advance cargo information, coordinated control scenarios) and transparent transit rules so that the intermodal chain can be planned from the Ukrainian dispatch point to the European hub.

2. Separate transit from political conflicts and create a "non-politicized transit" protocol
The thesis that transit should not become hostage to internal conflicts (agricultural or carrier) sounded like a practical business need. The solution could be a joint protocol that defines a minimum guaranteed regime for transit cargo (and specified categories), even during periods of protests or crises.

3. Develop intermodal transport through terminals and hubs
Intermodal transport runs into terminal capacity, processing technology, and operation coordination. Investments in terminals should be tied to a clear cargo base and integrated technological processes on the Ukraine-Poland-ports/hubs chain.

4. Maintain a dual-track strategy: 1435 mm as integration, 1520 mm as resilience and capacity
Key consensus: European gauge is needed, but abandoning the 1520 mm network would be risky. The optimal strategy for the transition period is parallel development to avoid losing capacity, flexibility, and opportunities for transit and export during the war and reconstruction.

5. Form a joint Ukraine-Poland investment portfolio of projects in TEN-T/CEF logic
The presentations showed that projects exist, but coordination is needed: what comes first, what produces the greatest effect on throughput capacity, and how investments on one side of the border don't run into a bottleneck on the other. Accordingly, a joint priority list with sequencing and measurable indicators is needed.

6. Integrate two risks into transport policy: security and EU "green" regulation
Logistics resilience under attacks and the impact of future regulations (particularly CBAM) are already current competitiveness factors. Scenario plans for corridors, reservation of critical infrastructure, and coordinated steps to adapt to new EU rules are needed.

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