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Reconnecting Ukraine: Strategic corridors, ports and logistics for Ukraine's future economy

Insight in Brief

- Corridors are economic networks and systems that link production, energy, logistics and end-user markets.
- Resilience is enhanced when there are multiple and competitive route and modal choices to market: land gateways, seaports and inland waterways offering competitive and reliable choices for cargo owners, service providers, and end-users.
- The strategic intent is to transition from simple transport corridors towards integrated economic corridors with prioritised, sequenced investment programmes to capture transport cost savings and wider economic benefits.
- Coordination across institutions and borders is as important as physical capacity.

Corridors are economic systems that link production, energy, logistics and markets.

Ukraine's trade and transport connections have changed profoundly and are shaping its longer-term economic geography and integration with Europe. Corridor investment should do more than restore capacity. Ukraine needs a resilient, interconnected system of EU land gateways, seaports and inland waterways that connects productive centres to markets and keeps functioning as conditions change. All of this must be planned while the war continues, with risk part of every investment decision.

The scale of the task is clear. Transport is the largest single category of reconstruction need in the latest joint assessment (RDNA5), at over USD 96 billion, and transport needs have risen by about a quarter since the previous assessment. The question is where that investment should go, in what order, and how it connects to the economy Ukraine is building.

01 Towards long-term economic integration

The geography of reconstruction should be shaped by the economy Ukraine is building, as well as by immediate needs.

Essential infrastructure must not only be restored but it must be restored where communities and economic activity require it. Transformational investment should reflect security, population and workforce, productive capabilities, energy, connectivity integrity, and access to markets.

In practice this is a two-part test for each investment:

- Does it restore an essential service?
- Does it contribute to the economy Ukraine is building?

EU accession is increasingly becoming a physical as well as institutional process. Investment in Trans-European Transport Network (TEN-T) connections, border crossings, rail interoperability and European-standard gauge, customs systems and logistics infrastructure is strengthening Ukraine's connectivity with the EU. In 2024 the EU extended four of its European transport corridors to Ukraine and Moldova. Their completion is phased on the EU side, with the core network due by 2030, which gives Ukrainian planning a reference point for standards and sequencing.[1]

Table 1. Spatial typologies and their role in the future economy

Spatial typology	Role in the future economy
EU border gateway zones	Increasingly a production and supply-chain interface with the EU
Port and waterway systems	Production, processing, logistics and access to international markets
Major metropolitan centres	Capital, labour, agriculture, engineering, and logistics, consumption centres
Established industrial belts	Engineering, advanced manufacturing, defence, and dual-use capabilities
Rural and agricultural production areas and smaller towns	Agricultural production and food processing value chains, with smaller towns acting as local service and logistics hubs that link producers to corridors and gateways

WHAT THIS MEANS FOR PROGRAMMING:

- Screen each investment against both tests, essential restoration and contribution to future economic geography, and sequence accordingly.
- Use spatial typologies as planning units, so that strategies can be developed and discussed on the basis of economic function.
- Specify new and upgraded links to EU network standards from the outset, so that they stay compatible as the TEN-T corridors extend into Ukraine.

[1] European Union. 2024. *Regulation (EU) 2024/1679 on Union guidelines for the development of the trans-European transport network*. https://eur-lex.europa.eu/eli/reg/2024/1679/oj

02 Resilience through multiple competitive gateways

Recent experience has demonstrated the strategic value of being able to redirect trade as access conditions change.

Ukraine needs both efficient primary corridors and sufficient redundancy across land routes to the EU, inland waterways, and seaports. The European Commission's Solidarity Lanes data show the point.[2] Since May 2022, around 230 million tonnes of Ukrainian exports and 111 million tonnes of imports have moved through EU routes. For grain and oilseeds, about 40 per cent of approximately 255 million tonnes exported went through the EU lanes and about 60 per cent through Ukrainian sea ports. Neither system alone carried the trade.

The objective is not duplication, but a trade and logistics system able to adapt to security shocks, infrastructure disruption, and changing market conditions. This makes port and waterway systems and EU land gateways complementary rather than competing strategies. Route and modal choices strengthen resilience and user choices which creates a virtuous cycle of competition and improvements to reduce total transport costs.

Table 2. Complementary roles of the three route types

Route type	Role in the system	Planning question
EU land gateways	Diversification, supply-chain links with the EU	Border capacity, rail interoperability, processing at the border
Sea ports	Scale for bulk trade and processing	Landside connections, protection, and recovery capacity
Inland waterways	Additional bulk capacity and resilience	Capacity and links to rail, road, and processing

WHAT THIS MEANS FOR PROGRAMMING:

- Appraise routes as a portfolio, with a defined role for each and a clear view of how much trade can switch between them.
- Invest in the connections between routes, such as rail and road links and inland logistics hubs, and not only in the routes themselves.
- Agree contingency procedures in advance with customs and transport authorities, so that traffic can be diverted quickly when conditions change.

03 Planning corridors as economic systems

A strategic corridor is not just a road, a railway, and a port.

It is an economic system linking production clusters, energy, road and rail networks, logistics facilities, and border crossings and ports to European and global markets.

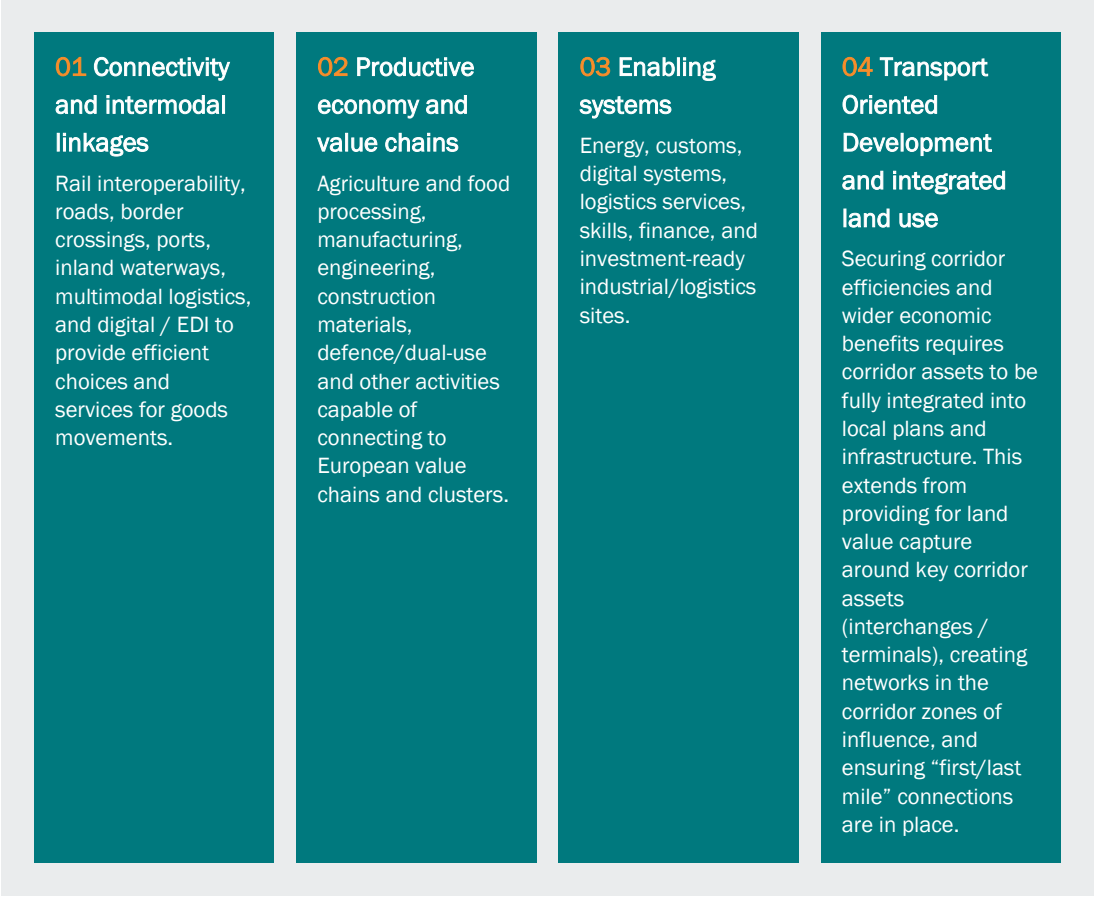
Evidence from corridor projects financed by international financial institutions (IFIs) suggests that new corridors are associated with faster growth in surrounding economic activity than upgrades

[2] European Commission. 2026. *Solidarity Lanes: results achieved, July 2026* (cumulative figures since May 2022), as published by EU Neighbours East. https://euneighbourseast.eu/news/latest-news/solidarity-lanes-european-commission-publishes-results-achieved-in-july-2026/

of existing ones.[3] Because most of Ukraine's corridor investment will upgrade or restore existing routes, the economic return is likely to depend on what is built around them, such as border facilitation and last-mile links.[4]

Three systems therefore need to be considered together:

Figure 1. The four systems of an economic corridor



WHAT THIS MEANS FOR PROGRAMMING:

- Build each corridor plan in three layers: connectivity, productive economy, and enabling systems, and fund them in the same programme.
- Test demand early with anchor users and productive clusters, so that capacity is sized to real flows.
- Track corridor performance, such as transit time, cost, and reliability, alongside delivery of assets.

[3] Alam, M., Herrera Dappe, M., Melecky, M. and Goldblatt, R. 2022. *Wider economic benefits of transport corridors: evidence from international development organizations*. Journal of Development Economics, 158, 102900.

[4] Arun, A. and Duhaut, A. 2023. *Impact evaluation of transport corridors: approach from the ieConnect portfolio.* Mobility and Development: Innovations, Policies, and Practices, Spring 2023, Edition 1. World Bank.

04

Ports as nodes within wider economic systems

Ukraine's ports remain fundamental to the economics of national economy. The bulk trades are critical to exports and depend on efficient ports, while inland waterways and land routes to the EU provide important diversification and resilience.

Planning ports as isolated assets risks missing the wider economic opportunity.

Planning ports as isolated assets risks missing the wider economic opportunity. Their performance depends on connections to rail and road networks, inland logistics, processing and storage capacity, energy, customs, and productive hinterlands.

The port and waterway system can be viewed as a wider production-processing-logistics-trade system, linking Ukrainian productive capacity to European and global markets. The trade data point the same way. Through the EU Solidarity Lanes, non-agricultural exports exceeded agricultural exports since 2022, which shows a trade base broader than grain and a need for logistics that can handle varied cargo.

Similarly, land gateways to the EU can evolve beyond transit routes towards cross-border production and supply-chain interfaces with the EU.

WHAT THIS MEANS FOR PROGRAMMING:

- Appraise a port and its landside links, storage, processing, and energy supply as one investment package.
- Plan logistics and industrial sites next to land gateways alongside the crossings themselves, so that border zones add value and not only transit.
- Design for varied cargo, not one commodity, so that capacity remains useful as trade patterns change.

05

Coordinating across institutions and borders

Infrastructure alone will not create functioning economic corridors.

The quality of cross-border processes can be as important as the physical capacity of the infrastructure itself.

Many strategic routes involve Ukrainian ministries and agencies, municipalities, infrastructure operators, customs authorities, neighbouring governments, EU institutions, IFIs and private operators. Each has a different role in the corridor, so a corridor works only when they act together.

Table 3. Who controls what along a corridor

Actor	Role in the corridor
Ukrainian ministries and agencies	Policy, budgets, standards, regulation
Municipalities	Local roads, land use, services, sites
Infrastructure operators	Asset condition, capacity, and operations
Customs and border authorities	Clearance, inspection, and processing times

Neighbouring governments and EU institutions	The other side of the border, network standards, EU funding
IFIs and development partners	Finance, risk-sharing, appraisal and safeguard standards
Private operators and investors	Logistics services, operations, commercial investment

Effective corridors therefore require coordination across infrastructure, border processes, customs, regulation, operators, investment, and cross-border governance. The quality of cross-border processes can be as important as the physical capacity of the infrastructure itself.

The EU's own corridor rules reflect this. The revised TEN-T Regulation sets a benchmark for freight trains crossing Member State borders of an average dwell time of no more than 25 minutes, and the OECD recommends co-ordinating infrastructure policy across levels of government.[5] Ukraine's border crossings with the EU can be planned and measured against the same standard.

WHAT THIS MEANS FOR PROGRAMMING

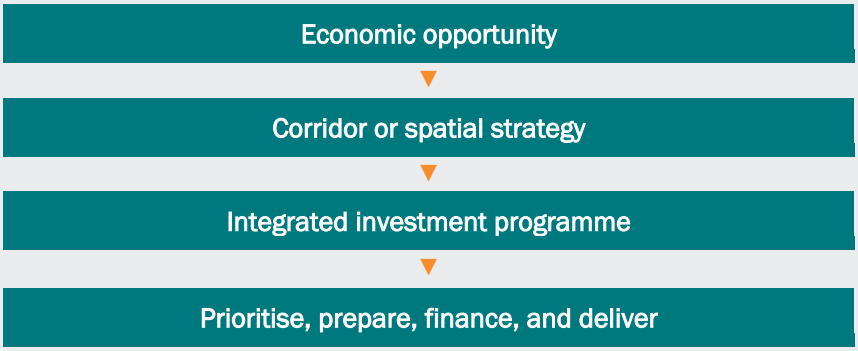
- Set up a coordination body for each priority corridor, with a clear mandate, shared data, and a regular cycle of decisions.
- Agree joint performance targets with neighbouring authorities, such as border dwell times, and track them as part of the corridor programme.
- Include border and customs improvements in the corridor investment programme, alongside the physical works.

06 From strategic corridors to investable programmes

Corridor strategies ultimately need to become prioritised and sequenced investment programmes.

The starting point is the economic opportunity, which shapes a corridor or spatial strategy. That strategy is then turned into an integrated investment programme, from which public and commercially viable investments are prioritised, prepared, financed and delivered in sequence.

Figure 2. From economic opportunity to investment programme



[5]OECD. 2020. *Recommendation of the Council on Infrastructure Governance*. https://t4.oecd.org/gov/infrastructure-governance/recommendation

Different elements require different forms of capital:

- **Public and concessional finance** will remain central to public goods and enabling infrastructure.
- **Development finance** can address appropriate risks and help create markets.
- **Commercial capital** can finance viable logistics, processing, industrial and service opportunities.

The EU's Ukraine Facility offers up to EUR 50 billion to 2027, including the Ukraine Investment Framework, which combines EUR 9.6 billion of guarantees and grants with the aim of mobilising up to EUR 40 billion of public and private investment.[6] Corridor programmes are well placed to use it, provided they identify which parts can attract commercial capital and which need public support.

Investing while the war continues

Private investors will not commit at scale until they can price, share or insure the risk of war damage. The tools are starting to appear but remain small next to the need. The World Bank Group's Multilateral Investment Guarantee Agency (MIGA) insures against war damage and has issued about USD 573 million of guarantees in Ukraine since February 2022, mostly for banks and trade finance, with cover for investment in production, logistics and infrastructure to follow as conditions allow. The Ukraine Investment Framework adds EU guarantees that share risk with the IFIs and banks that lend and invest in Ukraine.

Design can also reduce exposure. Each phase of an investment should be useful even if the next one is delayed. Critical links should be quick to repair or have a back-up route, and key assets should not all sit in the most exposed places.

WHAT THIS MEANS FOR PROGRAMMING:

- Sequence each corridor programme in three steps: early actions that unlock capacity at bottlenecks and border processes, then capacity upgrades, then expansion tied to demand.
- Separate, within each programme, the public enabling infrastructure from the commercially viable logistics, processing and industrial elements, and match each to the right capital.
- Run corridor preparation through the same stage gates and financing pathways as other pipeline investments.
- Treat war risk in the design by combining guarantees and insurance with phased delivery, so that early actions deliver value on their own, and with design for repair and redundancy.

[6] European Commission. 2026. *Ukraine Facility*. https://commission.europa.eu/topics/eu-solidarity-ukraine/eu-assistance-ukraine/ukraine-facility_en

07

Implications for Ukraine and its partners

Four practical priorities for Ukraine and its partners as corridor investment is planned and delivered:

1. Plan for Ukraine's future economy: investment decisions should reflect future trade patterns, EU integration, security, regional value chains, productive capacity and the spatial organisation of economic activity.
2. Treat corridors as economic systems and build in resilience: coordinate transport with energy, production, land use, logistics, border infrastructure, and markets, while maintaining route optionality and managing war risk through insurance, phasing, and design.
3. Move from individual assets to integrated investment programmes: translate corridor strategies into prioritised, sequenced pipelines, with financing pathways and cross-border coordination.
4. Use international support to build lasting Ukrainian capability: it should strengthen the institutions, systems, and market capacity through which Ukraine can plan, prepare, and deliver corridor investment.

Triple Line's Proposition

For more than 25 years, Triple Line has helped governments and development partners to plan the economic geography of investment and to turn plans into prepared, financed projects.

Our teams combine regional and local economic development planning, including strategies that support EU accession, with infrastructure advisory: spatial frameworks to guide investment, project identification, screening and prioritisation, pre-feasibility and feasibility studies, and funding strategies matched to local capacity and private sector participation. We have carried out diagnostics on strategic infrastructure procurement, green finance, and inland water transport, and have built tools to assess the supply of and demand for industrial and logistics land, estimate job creation impacts and screen projects for environmental, social and governance risk. Examples include a spatial framework to guide infrastructure investment for a coastal port city, and scoping work that laid the foundations for follow-on programmes financed by bilateral and EU partners. In Ukraine, our team has advised ministries, regions, and municipalities for the European Commission, GIZ and other clients.

To deliver our infrastructure investment work in Europe we are pleased to have developed a strategic partnership with the team at UA Direct. Together we combine sectoral expertise with deep local knowledge of Ukraine. As part of the partnership, UA Direct Managing Partner Oleksiy Starodubov has joined Triple Line as Principal Advisor. Together, we look forward to developing practical programmes, partnerships and investment opportunities that contribute to Ukraine's recovery and long-term economic development.

For further analysis of the needs and challenges of Ukraine's recovery journey please see here.