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The quiet transformation of the post-socialist development paradigm: Industrial policy in the EV transition in Hungary and Poland

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Abstract:

In a world of unravelling multilateral liberal order, the Central and Eastern European region represents a microcosm of the destabilizing and transformative processes present in small, open and dependent economies as a result. The article explores how the region navigates this volatile era, focusing on the development of two ongoing industrial policy-driven projects in the EV transition in Hungary and Poland. These projects vary in their contribution to development: while the Hungarian state-backed bet on EV battery production is now widely considered a failure, the Polish attempt at launching a domestic EV brand, despite being troubled by delays, has successfully passed a number of early milestones. The article draws on industrial policy literature to explain the reasons behind these varying outcomes and constructs a framework for comparing the two cases, focusing on the formulation and implementation of the projects' objectives, and their institutional background, as the two key factors.

Keywords: industrial policy; dependency; Central and Eastern Europe; automotive; green transition

Introduction

The unravelling of the multilateral liberal order comes with impacts on small, open and dependent economies that are both destabilizing and transformative. The post-socialist Central and Eastern Europe (CEE) is a microcosm of these processes: as "students" of neoliberal capitalism, the CEE economies were well-positioned to take advantage of the pre-2008 globalization, yet the geopolitical volatility of the 2020s, accompanied by a growing stagnation of the European core, renders their old development model increasingly obsolete. They face a dual challenge: to not fall out of the rapidly transforming global production chains, and to improve the position of their domestic economies within the global division of labor. In order to counter the destabilizing pressures and take advantage of new developmental opportunities, some countries in the region turn to the use of industrial policy and increasing state economic interventionism. However, such a strategy is not without its pitfalls.

The article contributes to the growing literature on industrial policy in the CEE region by examining and comparing two industrial policy-driven projects in Hungary and Poland related to the electronic vehicle (EV) transition, which took place between the late 2010s and mid-2020s. The two projects vary in their contribution to the development of their respective countries: while the Hungarian state-backed bet on EV battery production is now widely considered to be a failure, the Polish attempt at launching a domestic EV brand is still ongoing and, despite being troubled by delays, has passed a number of early milestones necessary for its successful implementation. The article aims to explain the reasons behind the different outcomes of the two projects by drawing on existing industrial policy research and constructing a framework for examining and comparing the two cases. It focuses on two main aspects: the difference in formulating and implementing the objectives of the industrial policy projects, and the difference in their institutional background, namely their legitimacy and institutional continuity of the state apparatus behind them.

The rest of the article is organized as follows: part 1 places the article within the broader context of literature on the post-socialist development of the CEE region and sets up a framework for the comparative case study. Part 2 presents the two cases of EV industrial policy in Hungary and Poland. Part 3 provides a discussion and conclusion.

The contested new industrial policy of the CEE region

The complex process of fragmentation of the world order(s), especially the end of an era of relative openness and stability of the global economy, has complex destabilizing and transformative impacts on small, open and dependent countries on the economic periphery. This is the case of the CEE region, which has entered the global economy in the early 1990s striving to integrate into the system of Ruggie's (1982) embedded liberalism (i.e. multilateralism compatible with requirements of domestic stability), but has instead been regularly exposed to the pressures of the "competition state" characterized by vulnerability to regulatory arbitrage and marginal price sensitivity of international investors (Cerny, 1994). The article aims to explore a particular case of how the region navigates this uneasy peripheral space in an era of heightened geopolitical and economic volatility.

The CEE region's economic development in the post-socialist era has been studied by a heterogenous collection of approaches spanning from somewhat critical works of economic history (Myant & Drahokoupil, 2011) to the "dependent market economy" literature (Bohle &

Greskovits, 2012; Bohle & Regan, 2021; Nölke & Vliegenthart, 2009) and critical analyses of the region's dependency (Celi et al., 2022; Fabry, 2019; Gagyi & Gerőcs, 2025; Galgóczi et al., 2015; Kuc-Czarnecka et al., 2021; Podkaminer, 2015), accompanied by a number of country-case studies (Krpec & Hodulák, 2018; Naczyk, 2022; Scheiring, 2020) and some sectoral studies, including those of the automotive sector (Pavlínek et al., 2017; Pavlínek, 2023). These present the region as occupying a position of an integrated periphery within the European economy, one whose economic structure is centered around foreign transnational companies as the dominant providers of investment and technology transfers (Nölke & Vliegenthart, 2009; Nölke, 2018), as well as facilitators of the region's mostly export-driven growth (e. g. Burroni et al., 2021).

These works, which generally tend to look to the past or analyse structural aspects of the region's post-socialist development, are increasingly accompanied by new research focused on the dynamics of the region's industrial policy and possibilities of future development within the dependency framework. Following the general trend of revived interest in industrial policy and state capitalism research (Alami & Dixon, 2024; Juhász et al., 2024), this literature studies the possibilities of development within CEE's dependent position (Gál & Lux, 2022; Kalanta, 2024) or documents the various industrial policy initiatives that take place in the CEE countries (Naczyk, 2022; Scheiring, 2020; Zavarská et al., 2023). The article aims to contribute to this research by 1) examining and comparing the two industrial policy-driven EV projects in Hungary and Poland, and 2) discussing their ability to contribute to their economies' developmental goals within the framework drawn from existing industrial policy research, which highlights the role of specific objectives and institutional background in the development process. While these themes are frequently discussed by key authors writing on industrial policy (such as Peter Evans, Dani Rodrik, or Ha-Joon Chang), the article aims to embed them more explicitly in the emerging scholarship on industrial policy in the CEE region.

The article aims to examine two aspects of industrial policy in the EV transition in which the Hungarian and Polish cases differ: the formulation and implementation of objectives of the projects, which should aim at maintaining and improving the economies' position in global production chains; and the institutional background, namely the public legitimacy of the projects and the institutional continuity of the state apparatus. The former relates to what Gagyi and Gerőcs (2025) describe as the dependent economies' dilemma between autarky and openness: while remaining outside the global market structures allows a country to retain greater autonomy, but comes with the downside of limited access to foreign technologies and global markets, subordination to global market forces provides access to technology transfers and the possibility of export-driven growth at the price of being exposed to possibly harmful impacts of globalization. The isolationist strategy pursued (at least partially) during the socialist era was firmly rejected in the 1990s, as the CEE countries radically opened up to global market forces. However, such resolute swinging to the opposite direction resulted in a growing dependency on foreign markets (Myant & Drahokoupil, 2011; Nölke & Vliegenthart, 2009) and the emergence of an economic structure described by Rugraff (2008) as dualistic, with foreign transnational corporations operating as drivers of productivity, but creating very limited linkages to the domestic economy. The CEE industrial policy in Hungary and Poland, some of the most interventionist countries in the region, has to be understood as an explicit revolt against this dependence in the aftermath of the Eurozone crisis, and as an attempt at establishing pockets of domestically-controlled, innovation-driven growth (Fabry, 2019; Naczyk, 2022; Scheiring, 2020); or, as proposed by Gál & Lux (2022, p. 82), at improving local embeddedness

of capital, anchoring innovation and R&D activities, strengthening local ties of FDI, and "retaining the benefits of foreign investment while systematically reducing its dependencies".

This is in line with the findings of the industrial policy literature, which argues that industrial policy increasingly serves as a way to promote exports and (especially in less developed countries) to "harness FDI in ways that would increase linkages to their domestic economies" (Juhász et al., 2024, pp. 12–14). Chang and Andreoni (2020) point out that such "technological upgrading" is especially challenging to conduct for countries in which foreign transnational companies organize and control the production chain, and that the state should step in to minimize the private sector's uncertainty, facilitate learning in production, provide macroeconomic management and govern potential conflicts of interests in a role labelled by Evans (1989) as a "surrogate entrepreneur". The article shows that the objective of creating linkages to the domestic economy and improving its position was not clearly stated or pursued in the Hungarian case, while it has been central to the Polish project.

However, a successful fulfillment of such a role hinges upon the institutional stability and continuity of the state apparatus, as well as on the legitimacy of the industrial policy in the eyes of the public. The argument that industrial policy invites rent-seeking and abuse of power remains among its most common critiques, and it is especially relevant to address in case of the CEE countries, which typically have weaker political institutions and in the past two decades have been prone to "democratic backsliding". Juhász et al. (2024, p. 3) argue that rent-seeking and developmental governments are, on some level, observationally equivalent, and therefore difficult to distinguish. However, according to Evans (1989, 1995), the developmental state can be characterized by the ability of its institutions (specifically its bureaucracy) to act as an autonomous constitutive entity capable of collaboratively pursuing projects of public interest. Evans contrasts this with the predatory state structure, in which the ability to perform collaborative action is absent, and individuals in positions of political power instead engage in unconstrained rent-seeking, i.e. preying upon the rest of the society. Rodrik (2008, pp. 29–30) touches upon a similar problem by highlighting the importance of "accountability", i.e. the responsiveness of the state apparatus to the public's reception of the industrial policy. In case of the CEE countries, the article shows that the Hungarian EV battery project, which emerged under the patronage of Fidesz, lacked responsiveness to the public's grievances and ultimately lost legitimacy; meanwhile the ability of the Polish EV brand initiative to survive (in somewhat altered form) a major transition of political power signifies that it enjoys relatively wide legitimacy and institutional continuity, which may contribute to the successful implementation of the project.

Industrial policy in the EV transition in Hungary and Poland: A case comparison

Industrial policy in the EV transition is analysed as an illustrative example of the destabilizing and transformative effects that the global geopolitical and economic volatility has on the CEE region. The EV transition itself is a major source of both international and industry upheaval, which, especially in Europe, results in growing instability, as European producers (including the CEE countries) struggle to keep up with global competitors. This creates significant pressures for the region, as CEE countries are heavily reliant on export-oriented automotive production: in Hungary, the sector contributes approximately 20% of GDP and employs about 100 000 workers (Horvath, 2025); in Poland, it is about 8% of GDP and 213 000 jobs, possibly up to 400 000 if the wider supply chain is considered (Trade.gov.pl, 2026).

The systemic aspects of CEE's integration within the industry make it especially vulnerable, but also motivated to improve its position. The automotive industry is characterized by a rigid hierarchy between manufacturers and suppliers, as well as high barriers to entry (Sturgeon et al., 2008). The literature on automotive production in the CEE region confirms that the countries are integrated within a core-periphery structure in which they serve as production sites, but are largely excluded from strategic decision-making or high-value-added and research-oriented production activities due to the dominance of foreign automotive manufacturers and upper-tier suppliers (Pavlínek et al., 2017); this structure clearly corresponds to Rugraff's argument about dualistic economy.

In CEE countries such as Hungary and Poland, which have over the course of the 2010s undergone their "revolt against dependency", the automotive sector as a major source of dependency and an industry known for its high barriers to entry represents a natural target for industrial policy initiatives. By launching these projects, the two countries stand in stark contrast to the other large automotive manufacturers in the region, the Czech Republic and Slovakia. These operate in structurally very similar conditions, yet their domestic debate lacks the same developmentalist pressures that would be a prerequisite for engaging in active EV industrial policy, and they generally remain within the dependent FDI-driven paradigm.

Hungarian EV battery industry: State-backed move on battery production resulted in deepened dependency

In Hungary, the move towards increased state economic interventionism has been intertwined with the rise of illiberalism since Fidesz' ascent to power in 2010. "Orbanomics" exploited grievances of both the domestic capitalists and broader society with Hungary's post-1989 dependency, and with the new mandate shifted the state's development strategy from passive integration in global production chains to selective interventionism (Scheiring, 2020). In sectors deemed as "strategic" (often those serving the domestic market, such as banking, construction or retail), foreign companies' operations were constrained by sector-specific taxes, selective use of competition law, and distortion of public procurement to benefit favoured companies (Albrecht, 2024). Meanwhile, in traditional export-oriented sectors (such as automotive), the state continues to court foreign investors (e.g. Medve-Bálint & Éltető, 2024). The Fidész-backed push for expansion of EV battery production was presented as a developmentalist project, and in theory could have exploited a real window of opportunity and improve the country's position in the automotive production chains. However, the article shows that the formulation and implementation of its objectives was far from sufficient, and the illiberal state apparatus showed a significant lack of responsiveness to the public's grievances over the project's impacts, leading to a widespread public backlash and loss of confidence in the project.

Hungary's official strategy for EV battery production dates to 2020-2021, when a reference material was developed by the Hungarian Ministry of Innovation and Technology in cooperation with the EIT InnoEnergy. The material highlighted the need for decarbonization and identified the green transition of the automotive industry as an opportunity for Hungarian economy, as it is heavily dependent on automotive production and at the time has already been one of the largest manufacturing centers of lithium-ion batteries in Europe (Ministry of Innovation and Technology, 2021b). The "National Battery Industry Strategy 2030", which was based on the material, has been adopted by a Government Decision 1766/2021 (X. 29.) in October 2021; however, the strategy has only been published on the government's website in

September 2022, almost a year later (Éltető, 2024). The government also adopted the practice of labelling major battery plant investments as strategic, granting them a fast-track approval (Éltető, 2024). The objectives of the project identified by the document are decarbonization of transport, sustainable use of batteries, as well as the creation of competitive battery value chain in Hungary and development of the country's innovation capacities (Ministry of Innovation and Technology, 2021a). However, unlike in the Polish case, strengthening of domestic position in the production chain was not presented as the project's central objective, nor were the proposed steps leading towards strengthening of innovation capacities as ambitious or robust.

In the meantime, foreign investment in the EV battery ecosystem has been underway. In April 2025, the investigative portal atlatszo.hu identified 39 battery plants that currently operate in Hungary (Bodnar & Soma, 2025); the Hungarian Battery Association highlights six of those in its 2025 report (Magyar Akkumulátor Szövetség, 2025). The first construction began by Samsung as early as 2017 in the city of Göd, production of lithium-ion batteries started in 2018 and the production has been twice expanded in 2019 and 2024 (Szalai, 2025). Another South Korean investor SK Innovation began construction of its first plant in Komárom in 2018, a year later the production expanded; the total value of the investment was about HUF 708 billion (EUR 1 billion) while creating about 1400 jobs (Hungarian Investment Promotion Agency, 2018, 2019; Szőke, 2021) and having a production capacity of about 7.5 GWh. In 2021, the company announced that a second larger plant will be built in Iváncsa, with the capacity of 30 GWh and investment valued at 1.9 billion EUR; production in the plant began in 2024 (Szőke, 2021). In 2026, production has also begun in the CATL plant in Debrecen (first announced in 2022), employing about 1500 workers and aiming for an eventual annual capacity of 100 GWh (24.hu, 2025). Construction is underway in another Debrecen plant built by EVE Power, a strategic supplier of BMW (which also has a large presence in the city); it should be completed by 2027 and employ about 1000 workers (Debrecen4U, 2025). Finally, a third Chinese producer Sunwoda announced in 2023 an investment of HUF 580 billion (93 billion in the first phase) in the construction of its first European plant in Nyíregyháza; the work is currently underway (Aradi, 2023).

The state invested heavily in attracting foreign investors to locate their production in Hungary. Éltető (2023) estimates the total support at HUF 540 billion, excluding approximately HUF 380 billion in spent or planned infrastructure expenses. Eloð (2023) estimates a range between HUF 300-400 billion (excluding infrastructure expenses), or about one fifth of the total investment (Mudra, 2024). Éltető (2024, p. 29) also argues that lax environmental regulation was presented to companies as Hungary's competitive advantage in motivating them to invest in the country. These factors indeed attracted a number of large EV battery producers. However, evidence suggests that the project failed to establish closer links between these new projects and the rest of the Hungarian economy, nor did it succeed in transferring skills and know-how through which the country's innovation capabilities could be improved.

The Hungarian Battery Association reports that R&D activities remain one of the weaker aspects of the battery ecosystem, with underdeveloped innovation infrastructure and lack of investment: in 2023, companies engaged in electrical equipment manufacturing (including battery production) accounted for 2.6% of total R&D expenditure in Hungary despite having 9.1% share in total turnover (Magyar Akkumulátor Szövetség, 2025). Some of the foreign investors do cooperate with local institutions, such as the Samsung R&D center inaugurated in 2025, which was set up in cooperation with Óbuda University and the Budapest University of

Technology and Economics (Szalai, 2025); however, such initiatives seem to be rare. Limitations to knowledge-spillovers also exist at the level of actual production. It has been reported that a downward employment often occurs as workers with engineering degrees qualified for research-oriented work are hired as production supervisors or technicians (Eloð, 2023; Weiler, 2023); and Czirfusz (2023) points out the "foxconnisation" of the sector, with high shares of unskilled labor, low wages and flexible employment. Work shortages are also a problem (Czirfusz, 2023), resulting in influx of often low-skilled foreign workers; mistreatment of these workers is a common occurrence (Vigh, 2024).

Other sectors also find it challenging to connect to the battery ecosystem: e.g. the National Federation of Hungarian Building Contractors argues that it is impossible for local companies to participate in the plant construction, as projects are mostly awarded to firms from the investor's country of origin, and warns that Hungarian businesses are being squeezed out of work (Vitéz & Kiss, 2024). Additionally, reports suggest that the project suffers from rent-seeking, since if domestic companies do manage to take part in activities related to the battery production (such as infrastructure construction, disposal of battery waste or logistics), these are often controlled by figures close to the Fidesz leadership (Haász, 2026; Iván-Nagy, 2026; Weiler, 2024).

The illiberal state apparatus also showed considerable lack of responsiveness to the public's grievances over the impacts of the project. As mentioned, the Fidesz's EV industrial policy has been troubled by obfuscation since the beginning, as there was a serious lack of consultations with the public and relevant industry actors both in regard to the government strategy and the process of the plant constructions (Éltető, 2024; Győrffy, 2023). The concerns were justified, as battery production is increasingly associated with instances of severe environmental damage, pollution and work-place accidents, which is only exacerbated by the lack of official oversight. Kacskovics and Nyusztay (2023) map extensively the series of environmental pollution incidents and workplace accidents; Bodnar and Soma (2025) criticize the extensive water consumption and lack of transparency regarding water usage.

The public backlash over the environmental impacts has been significant and resulted in repeated protests, such as the *Mikepércs Mothers for the Environment* founded in April 2023 against the operations of the CATL plant in Debrecen (Lau, 2024). However, the state response is usually slow and insufficient. Éltető (2024) presents these incidents and the lack of response partially as a result of the state's reluctance to govern over the issue, as the lack of environmental regulation was the factor that originally made Hungary an attractive location. She points out that the official authorities often obfuscate key information and proceedings on purpose, illustrated e.g. by the issuance of a Government Decree 146/2023 (IV.27) which stipulated that public hearings regarding the construction projects may be held online without the personal presence of those concerned. However, she also adds that part of the problem has to do with the state's inability to provide sufficient protection to the public, since the scale of the EV production and related environmental and work-place incidents greatly exceeds the state's bureaucratic capacities.

As a result, the state-backed EV battery project is now widely considered a failure both in the eyes of the public (illustrated e.g. by the cited independent reporting), and by academic research on the topic. The project only vaguely identified the developmental objective of "building domestic innovation capacities", failed to implement robust and specific steps to actually

achieve it, and at best opened opportunities for domestic rent-seeking. More concerningly, it became a source of significant environmental harm to the public, to which the illiberal state apparatus largely failed to respond. Overall, the project came with high financial costs to the Hungarian state, yet failed to promote public interest, and ultimately only increased the country's dependency on foreign-controlled production chains. While it is too early to assess its fate under the new Tisza government, the party has been a vocal critic of the unregulated operations of the battery manufacturers, so there are reasons to expect a significant course correction of the current policy (Higgins & Rutai, 2026).

Electromobility Poland and the Izera project: Industrial policy with clear objectives and institutional continuity

Poland is another CEE country in which the state took an increasingly active role in economic policy-making over the 2010s, especially after the 2015 rise of the Law and Justice government. The 2016 Action Plan for Responsible Development (*Plan na rzecz Odpowiedzialnego Rozwoju*) identified economic dependency and "the middle-income trap" as fundamental challenges to Poland's development (Toplišek, 2020), and called for the state to become a "guide and partner" in expanding Poland's production capabilities. Toplišek points out that one of the significant channels for Poland's economic interventionism is through major state-owned enterprises (e.g. in airline, energy, rail or military), which have not been privatized after the socialist era. Other research on the repolonization of the banking sector suggests that private actors, specifically Polish top managers dissatisfied with the country's dependent position, are also a significant mobilizer of developmentalist sentiments (Naczyk, 2022).

Similarly, in the case of Electromobility Poland (EMP), the Polish attempt at launching a domestic EV brand, state ownership has been a significant aspect of the project from the beginning, and some reports trace its conception to a synergic coalition of managerial figures, political representatives, and local public officials (Mazur, 2026). As will be illustrated in more detail, since its start in 2016, the project has been troubled by frequent delays, and it is currently in late stages of planning, having recently secured a foreign technological partner and EU financing. It should therefore be treated with nuance, and not necessarily as a straightforward success in Poland's industrial policy efforts. However, when compared to the Hungarian case, EMP demonstrates considerably more promise based on firmer strategic and institutional foundations: its objectives were formulated in a much clearer manner, emphasizing the strengthening of domestic capacities as the project's priority, and are consistently pursued; and the legitimacy and institutional continuity of the project seems solid despite major upheavals on the Polish political scene. Therefore, the article argues that the EMP project deserves attention as an intriguing example of contemporary Polish developmentalism.

The EMP project emerged in 2016 as a shared venture of state-owned energy companies PGE, Energa, Enea and Tauron, each contributing 25% of its PLN 10 million (about EUR 2.3 million) share capital (cire.pl, 2016), established in line with the Responsible Development Plan. The share capital was increased to PLN 70 million in October 2018 (elektrowoz.pl, 2018), and in March 2019, EMP's CEO Piotr Zaremba announced that mass production will begin in 2022-2023 with expected annual capacity of 100 000 vehicles; the plant construction was expected to cost PLN 2 billion (dziennik.pl, 2019). In June 2020, the company presented the prototype of its vehicle Izera, while allegedly spending about half of the share capital. The costs of plant construction and introduction of the vehicle to the market were estimated at PLN 4.5 billion,

with the aim to finance PLN 1-2 billion from private investment (Derski, 2020). At the end of the year, it was announced that the plant will be built in Jaworzno in southern Poland, with the local administration demonstrating active support for the project (Mazur, 2026); it was expected to create approximately 15 000 new jobs, with production planned to begin in 2024 (Grabowski, 2020). In September 2021, the majority share in EMP (90,8%) was transferred to the State Treasury through its acquisition of newly issued shares, increasing the share capital to about PLN 600 million (elektromobilni.pl, 2025b). In November 2022, EMP entered in collaboration with the Chinese company Geely, which was supposed to produce the EVs' platform; the production date was again postponed to 2026 (Kowalczyk, 2022). While reporting on the project was marked by reasonable scepticism from the press regarding the transparency, failures to meet deadlines, and the (in)ability to embed the production in Poland instead of outsourcing key tasks to foreign partners (Kurdyła, 2020), the project remained ongoing.

However, the period from the end of 2023 to the spring of 2025 was marked by considerable volatility. By November 2023, the EMP failed to establish the Electromobility Fund, which was supposed to finance the continuation of the project (Kowalczyk, 2025b). This eventually thwarted the collaboration with Geely, which left the project in autumn 2025 due to delays on the Polish side (Kowalczyk, 2025a). At the same time, the change of government after the October 2023 elections represented potential threat to institutional continuity, with e.g. the new Minister of State Assets declaring that "Izera is nothing more than a hallucination of [Law and Justice]" (PolandDaily24.com, 2024). As a result, EMP experienced turbulent personnel changes over the course of 2024, with four replacements of the CEO before the appointment of Tomasz Kędzierski (otomoto.pl, 2024). Finally, in April 2025 the company presented its new strategy: the production site will remain in Jaworzno, around which an electromobility cluster should be built. The cost of the plant construction is estimated to be about PLN 4.5 billion and should come from Poland's EU Recovery and Resilience Facility (*Krajowy Plan Odbudowy* or KPO). According to information shared with the public, the project underwent selection process during 2025 and has been awarded funding in May 2026; construction is currently scheduled for 2026-2030 and production should be launched in 2029 (Ministerstwo Klimatu i Środowiska, 2026). One of the conditions for participating in KPO was to secure a joint venture with new technological partner to replace the departed Geely; in spring 2026 an agreement was reached with the Taiwanese Foxconn (Michniuk, 2026).

Assessing the viability of an ongoing project is understandably difficult, and it is only reasonable to remain sceptical: even if EMP does not fail for internal reasons, the plan is certainly ambitious and successful entry on the EV market might prove to be too hard a task to conquer. However, an assessment of the project's declared objectives suggests a relatively clear developmentalist intentions, supported by specific and robust steps for how to achieve them. Since the beginning, EMP was presented as a channel for transfer of know-how and technological capabilities from foreign partners to Polish producers (Biznes Alert, 2019; Flis-Flisiński, 2024). While continuation of the brand Izera is an open question, the core objectives of the project remain essentially unchanged, including active participation of Polish producers (who should represent about 80% of the supply chain), creation of highly-skilled jobs (1000 of the approximately 20-30 000 new positions should be in R&D), and innovation-driven development based in Poland (elektromobilni.pl, 2025b). The plant in Jaworzno should have annual output of 150 000 vehicles, 30% of which will be sold on Polish market (elektromobilni.pl, 2025a). Additionally, the industrial policy aspect of the project is quite explicit, with key figures repeatedly presenting the role of the state as a "coordinator"

responsible for facilitating Poland's challenging entry to the new EV market and supporting its innovation-driven development (Lidke, 2020; Walków, 2020).

Furthermore, the project demonstrated considerable institutional continuity and legitimacy among a broad coalition of actors. It survived a transfer of political power after the 2023 parliamentary elections, which was marked by the longtime animosity between the Law and Justice and the Civic Platform, a key party in the new governmental Civic Coalition (Mazur, 2026; Škvrňák, 2025). As mentioned, the Civic Coalition initially attempted to dismantle the project as part of its post-Law and Justice reforms. However, given that it already achieved considerable progress, including the possibility to secure EU funding, it has eventually been decided not to terminate it. Instead, it continued with essentially unchanged objectives, including a continued commitment to state interventionism: in an April 2025 interview, EMP's new CEO Kędzierski stressed the importance of public-private cooperation, and openly labelled the company as an industrial policy project (elektromobilni.pl, 2025b).

The EMP project remains in a state of flux, and we should remain cautious about early assessments. From the beginning, the project has been troubled by delays and chaotic leadership, which greatly contributed to the prolonged launching time; the failure to take advantage of the early EV transition in the beginning of the 2020s might realistically become its undoing. The initial investment into the project has also been much smaller than in the Hungarian case (600 million PLN / approximately 141 million EUR compared to 400 billion HUF / 1,1 billion EUR), with the later construction funding (4,5 billion PLN / 1 billion EUR) being secured from the EU Recovery and Resilience Facility. However, the project remains an intriguing illustration of contemporary Polish developmentalism, which seems to have quite a clear, assertive vision of its goals, and an acceptance of the new paradigm that goes above political affiliations.

Conclusion

Small, open and dependent economies experience the unravelling of the multilateral liberal order as a set of processes that are both destabilizing and transformative, and invite a wide spectrum of responses. Among them is the rise of state economic interventionism and the use of industrial policy, employed to maintain and improve the country's position in transforming global production chains. The article examines and compares two industrial policy-driven projects in the CEE region related to the EV transition that took place between the late 2010s and mid-2020s and illustrates how the region navigates the era of heightened geopolitical and economic volatility: a Hungarian state-backed bet on EV battery production and a Polish attempt at launching a domestic EV brand. It uses the insights provided by existing industrial policy research as a framework for examining the two cases and explaining the difference in objectives and institutional background of the Hungarian project, now widely considered to be a failure, and the Polish project, which, albeit still ongoing and troubled with delays, has passed a number of early milestones necessary for its successful implementation.

The examination and comparison of the two cases of EV industrial policy revealed that the fragmentation of world order(s) affects the dependent countries in both destabilizing ways (industrial policy as a response to the potential disintegration of a key industry) and transformative ways (industrial policy as an attempt to exploit the window of opportunity and improve the economy's position in the global division of labor). In the Hungarian case, the move on EV battery production might have been motivated more intensely by fears of falling

out of the automotive production chain (of which battery production is rapidly becoming a key component), while it can be argued that in the Polish case, ambitions to transform the country's dependent position were the primary motivation. Nevertheless, in both cases, volatility in the international environment contributed to the abandonment of the passive FDI-driven development model and to the rise of state interventionism.

The comparison also shows that industrial policy has its pitfalls, especially for countries with weaker political institutions; in fact, the institutional dimension seems to be a key factor in deciding whether an industrial policy project will be a net positive or negative. The Hungarian case illustrates that the costs of a potential failure are not only financial, but that such a project might have significant harmful impacts on the overall functioning of the society. On the other hand, the Polish case suggests that institutional continuity greatly improves the viability of a developmental project, its flexibility and embeddedness in the economy, as well as the resilience of its core objectives. By examining the two projects, the article aims to contribute to the emerging research on industrial policy in the CEE region by emphasizing the importance of clear objectives and agile, resilient institutions in the development process. A deeper understanding of these dynamics is especially important in the era of heightened geopolitical and economic volatility, which periodically opens new windows of opportunity for the region to explore, but also always carries the risk of disintegrating and destabilizing impacts on key industries, and requires informed, flexible and resilient responses.

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