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Towards the sea

The economic potential
of Poland's northern regions

AUTHORS

Tomasz Sawczuk

Dominik Brodacki

Jan Jęcz

Marek Świerczyński

Polityka Insight

TRANSLATION

Chris Borowski

EDITING

Jan Szelańiewicz

GRAPHIC DESIGN

Karolina Tomaszewska

Małgorzata Gryniewicz

Joanna Pamuła

Polityka Insight

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Why Poland should look north



Andrzej Bobiński
Managing Director
Polityka Insight

Most of Poland's history has unfolded along an east-west axis. It was important for merchants following trade routes and for invading armies. Over the centuries, this specific orientation has given rise to Polish insecurities, but it has also shaped our national ambitions.

Today, we ask ourselves whether it is possible to escape geography. Is there a world in which the north-south axis will shape our development, security, and foreign policy? Over the past 37 years, we have, as a community, tried to move from Eastern Europe to Central Europe (with a stop in Central and Eastern Europe on the way). Today, thanks to new technologies, we have the chance to chart a new course for ourselves on the map. Join us on a journey towards the sea, with the southern Baltic as our destination.

Thanks to major investment projects – primarily Poland's first nuclear power plant, but also offshore wind farms – Poland is becoming a Baltic country, and not just in narrative terms, as the north-south axis is becoming just as important, if not more so, than its centuries-old east-west counterpart. This process requires deeper integration, economic cooperation, and the development of international frameworks that will bolster Poland's leadership in the region.

These projects will generate follow-on investments – in the power grid, connectivity, and energy storage facilities, as well as a range of supporting industries. The region's importance will grow exponentially, as each new venture will create additional projects and opportunities. This requires a shift in thinking about investment policy. Pomerania will be home to the most important components of the state's digital policy – such as data centres, tech firm offices, but also energy-intensive and increasingly automated industrial plants. Consequently, the centre of gravity of Poland's economic development is and will be shifting north. This shift further reinforces the strategic importance of the Baltic Sea for the country's national security, trade, and foreign policy.

Our mission will also include strengthening economic cooperation in the region, improving connectivity, and bolstering deterrence and security in the Baltic Sea, which remains crucial for the Baltic state economies. But with these benefits come obligations. A region with such strategic importance will need to be adequately protected.

To this end, it must become a key element of the state's security architecture. The Baltic Sea must be protected jointly by Poland and its allies. The accession of Sweden and Finland to NATO is a step in the right direction, as is Warsaw signing a deal to purchase Swedish submarines. A key milestone in this effort would be integrating our defence and shipbuilding industries with those of our allies and friends in the north.

Finally, there is the issue of foreign policy. It seems that the political culture of the Nordic countries allows for more enduring alliances than those we have forged with our partners to the south. The former are far less vulnerable to upheavals stemming from changes in government. Within the Baltic framework, Poland can be a partner to Germany, a friend to Sweden, Finland, and Denmark, and a patron and source of support for the Baltic republics. And combining the northern frameworks with the Weimar Triangle, the Visegrád Four or E6 complements Poland's foreign policy toolkit, enabling multi-track diplomacy geared towards diverse objectives. It will also enable the forming of alliances within multilateral institutions and management of international contacts and their intensity depending on political circumstances, as well as the will and desire to cooperate on the part of successive, changing governments in the aforementioned countries.

Will the inevitable shift of Poland's geoeconomic center of gravity from Silesia towards Pomerania give rise to tensions and controversy? Will Silesia lose its position as the heart of the country's heavy industry? Gradually, yes, but this need not be bad news for the region. Once Ukraine secures a lasting peace and turns its focus to consolidating its security, its recovery, and future Euro-Atlantic integration, Silesia – alongside Lower Silesia and Subcarpathia – should build on their importance as logistics and industry superhubs for Europe and the broader region. Does this mean that Warsaw should pursue two different foreign policies? No. But this fragmentation should prompt more region-oriented thinking, which recasts them into the country's development engines. It will be in Pomerania's interest to see stronger integration of the Baltic states and closer cross-border cooperation, and in Silesia's interest to foster better cooperation with its neighbours – from Germany, through the Czech Republic and Slovakia, up to Ukraine. This regional specialisation should be supported by Polish foreign policy and generate synergy rather than rivalry between regions, whose roles are changing but their significance endures.

This report outlines a vision for Poland's turn towards the Baltic Sea. The construction of a nuclear power plant, the Port Polska transport hub, and our participation in the G20 summit are all part of this broader picture. We are living in an era of great civilisational change, the scale and implications of which we are not yet able to comprehend, let alone describe. This report is part of that story, written as it unfolds before our very eyes.

Key findings

1

Poland is turning towards the Baltic Sea

The historic east-west axis, which for centuries has defined Poland's political, security, and economic landscape, is now being complemented by an increasingly important north-south axis. These changes are being driven by strategic investments in nuclear power, offshore energy, ports, gas, the power grid, and defence. The report outlines the changes taking place in the fields of energy, security and the economy.

2

Pomerania is a key target for Poland's modernisation push

Historically, central and southern regions of Poland have dominated the country's economy. The Warsaw metropolitan region, together with Śląskie, Wielkopolskie, Dolnośląskie and Małopolskie Voivodships account for over 50% of the country's GDP, while Pomorskie and Zachodniopomorskie Voivodships accounted for a combined 9.5% in 2024. With new critical infrastructure development projects in the north, the operative role of the Coastal Region* in the national economy is growing significantly.

3

The Baltic Sea has become 'NATO's lake'

Following Finland and Sweden's accession to the Alliance, all states on the Baltic shores, Russia excluded, are now members of NATO. At the same time, Russia's growing hostility towards its western neighbours is giving rise to security threats, including in the hybrid domain, in what is formally peacetime. Economic development in the Baltic region must take into account the growing need to defend critical infrastructure. With its focus shifting towards the Baltic, Poland should develop its maritime capabilities as part of national security.

4

New ventures are reshaping the economic landscape of Pomerania

In recent years, a number of projects have been completed on the coast, including ports, roads, and railways, which not only bolster the region's strengths but also help accelerate its infrastructural development and close the gap with the country's most developed areas. The significance of these new strategic investments extends beyond energy and security, as they require the strengthening of local public services and the housing market; they create demand for new jobs and a new market for services.

in Polish, the term 'Wybrzeże' denotes the whole area along the country's Baltic coast; for the purpose of this report, it is translated to 'Coastal Region' – transl. note

5

This Baltic turn is moving the heart of Poland's energy sector from the south to the north

Until recently, the country's energy system has been centred on coal power and the coal-rich Silesia region, with the transmission grid sending power from the south of the country. The planned nuclear power plant in Choczewo, new offshore wind power projects, LNG terminals, the new Naftoport oil terminal, and the Baltic Pipe gas pipeline are helping change this situation. Under the new model, the Polish north ceases to be primarily a consumer of energy and becomes a region with strong power generation, balancing, and distribution capabilities.

6

The success of the Baltic turn hinges on the power grid

The planned 3.75 GW nuclear power plant is set to generate around 30–32 TWh of electricity per year, which represents a significant share of the current national consumption. Offshore wind farms are expected to reach a capacity of around 18 GW by 2040. Without adequate upgrades to the country's power transmission and distribution infrastructure, the region's potential – including in the areas of industry and data centres – will not be fully harnessed.

7

A shift north is an opportunity for Poland to strengthen its international standing

Poland is one of the region's most important countries in demographic, economic, and military terms, and can increasingly act as a security provider, rather than just a consumer. Increased cooperation within the Baltic Sea region's frameworks can complement interest in collaboration within the Weimar Triangle, the Visegrád Group, or the Bucharest Nine. Success in the efforts requires partnership-based leadership, as smaller Nordic and Baltic countries may be concerned about an imbalance of capabilities.

8

Poland can recast itself as the southern pillar of the Nordic-Baltic region

A shift north could strengthen Poland's brand, drawing on its current perception of a country of growth and security. The Nordics are consistently seen as setting the example in terms of quality of life: they lead the way in areas such as public institutions, living standards, the rule of law, and innovation. The vision of a shared 'Baltic mark of excellence' could serve as a complement to Polish thinking about identity and development. However, to be credible, such a vision must be based on real achievements and indicators, rather than a narrative of a turn to the north.



State of play

*Salted, reeking fish sufficed our ancestors of old,
We seek the fresh ones, splashing through the ocean, brave and bold!
Our fathers felt accomplished when they'd conquered fort and wall,
No storm can make us tremble, nor the sea's tremendous squall.
Our fathers used to hunt for deer, out in the woodland roaming,
We hunt for treasure, hunt sea monsters, in the ocean's foaming!*

Gallus Anonymous, *The Battle Hymn of Krzywousty*, 'The Polish Chronicle'

Locations of business and industry centres in Poland: whys and wherefores

Although today we take access to the sea for granted, for much of Poland's history, the present-day coastline lay outside the country's borders. The Piasts' control over Pomerania was established early on, but it was short-lived; from the outset, the region was a source of contention with regional rivals. Poland was able to maintain control over Gdańsk Pomerania periodically, but Western Pomerania was under the rule of Polish monarchs only temporarily.

The Partitions of Poland in the 18th century resulted in the long-term loss of Pomerania, and the Polish state regained access to the coast only in 1918, when it was reconstituted. Despite limited access to the sea (147 km of coastline, including the Hel Peninsula), Poland undertook an ambitious port development project in Gdynia and established a relatively strong Polish Navy. It was not until after World War II that Poland gained stable access to the entire stretch of the Baltic coast, which includes approximately 770 km of coastline and 501 km of maritime border, stretching from Świnoujście on the island of Usedom in the west to Piaski on the Vistula Spit in the east.

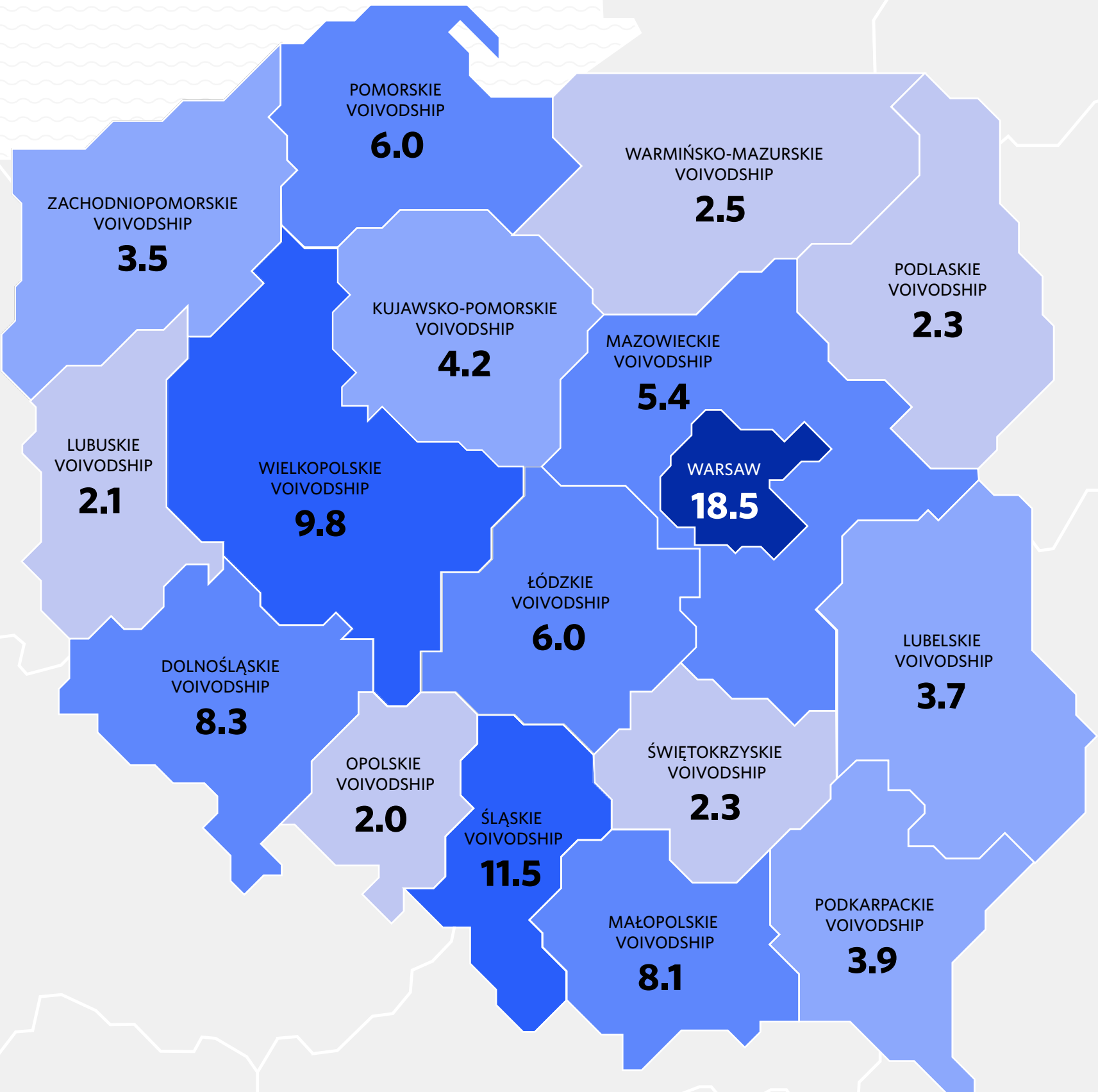
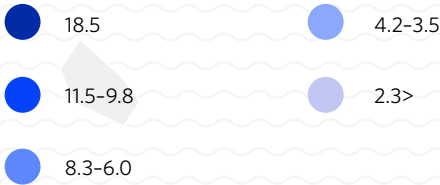
The history of Pomerania clearly demonstrates that the present-day location of economic centres in Poland is largely the result of historical and political factors, including shifts in state borders.

Today, industry and business continue to be concentrated primarily in areas where the most important urban centres, infrastructure, market access channels, and a skilled workforce could be found in the past. Thanks to its location at the mouth of the Vistula, at the turn of the 16th and 17th centuries, Gdańsk accounted for approximately 75% of Poland's trade in goods, primarily Polish grain exports.

In the 19th century, the reality of the Partitions affected the level of urbanisation and the quality of available infrastructure. For example, in 1914, the density of the rail network was several times higher in the Prussian partition than in its Russian counterpart; Upper Silesia became the most industrialised part of Poland, serving as Germany's second-largest mining and steel production centre after the Ruhr region. During the Second Polish Republic, between World Wars I and II, Gdańsk functioned as a city-state,

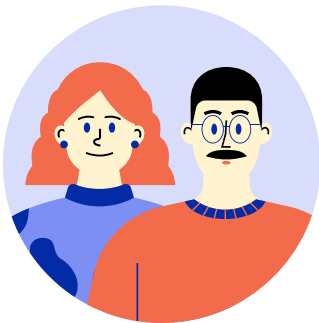
PERCENTAGE SHARE OF NATIONAL GDP BY REGION IN 2024 (CURRENT PRICES)

SOURCE: STATISTICS POLAND (GUS).

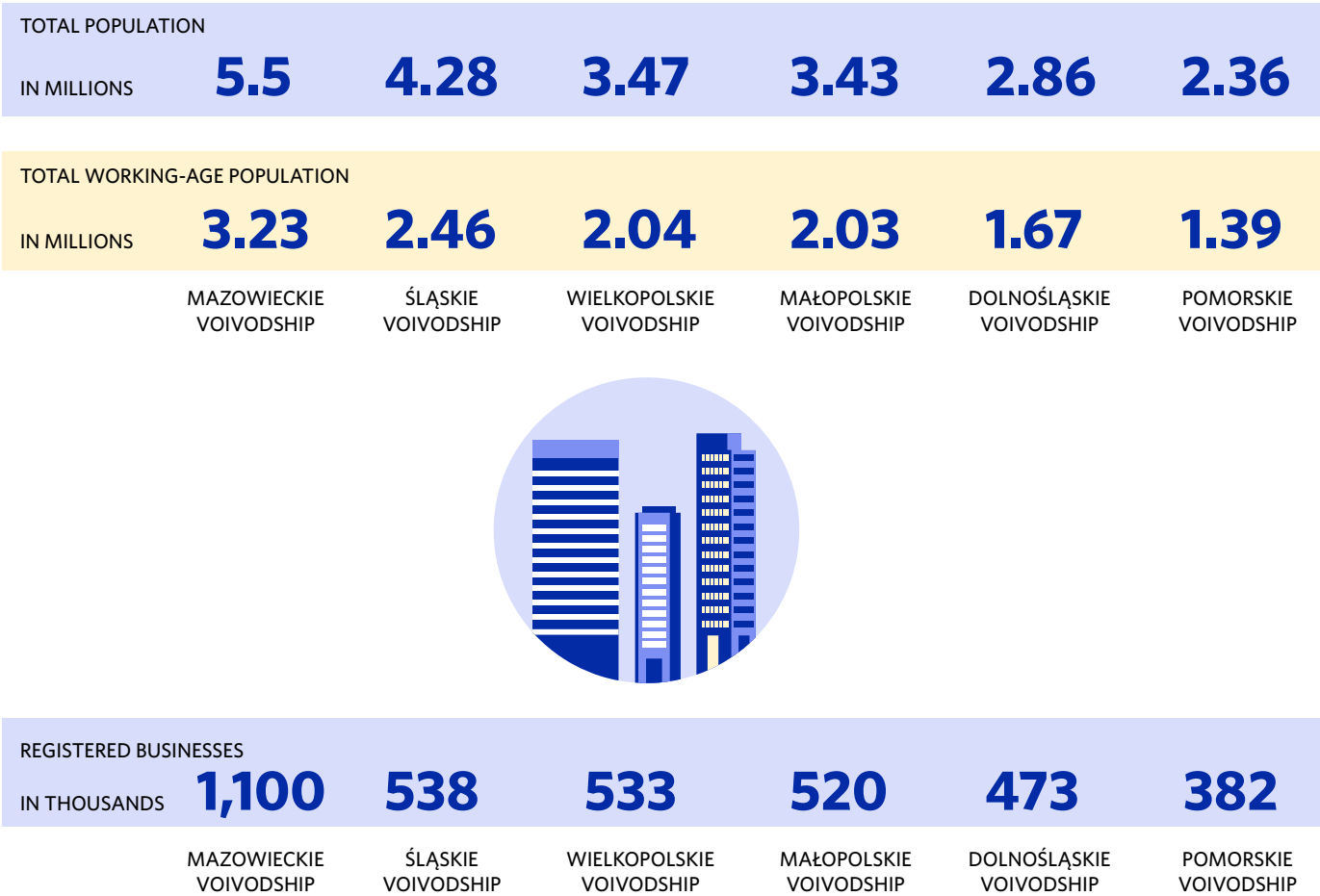


while the main metropolitan centres of modern-day Poland – Warsaw, Kraków, Wrocław, Poznań, and Łódź – sat further inland, away from the Baltic Sea. After 1945, the Communist regime in Poland adopted an economic model based on large industrial plants: Silesia remained the heart of heavy industry, while the Tricity* was the centre of ports and shipyards.

These factors continue to shape the national economy today. **According to estimates by Statistics Poland (GUS) for 2024, more than half of Poland’s GDP is generated by five regions: the Warsaw metropolitan area (18.5%), Śląskie Voivodship (11.5%), Wielkopolskie Voivodship (9.8%), Dolnośląskie Voivodship (8.3%) and Małopolskie Voivodship (8.1%).** The economies of Łódzkie and Pomorskie Voivodships are the same size, each accounting for 6% of Poland’s GDP. After Mazowieckie Voivodship excluding the Warsaw metropolitan area (5.4%), the next Voivodship, Kujawsko-Pomorskie, accounts for only 4.2%.



SOURCE: GUS 2024.



*an urban area including Gdańsk, Gdynia, and Sopot – transl. note

The data on population figures and the associated availability of (skilled) workers paint a similar picture. According to GUS data, as of mid-2025, the largest populations are found in the following voivodships: Mazowieckie (5.5 million total population / 3.23 million working-age population), Śląskie (4.28 million total population / 2.46 million working-age population), Wielkopolskie (3.47 million total population / 2.04 million working-age population), Małopolskie (3.43 million total population / 2.03 million working-age population), Dolnośląskie (2.86 million total population / 1.67 million working-age population) and Pomorskie (2.36 million total population / 1.39 million working-age population). The number of entities registered in the REGON national business database corresponds to this. According to figures for the first quarter of 2026, the highest numbers were recorded in Mazowieckie Voivodship (1.1 million), Śląskie Voivodship (558,000), Wielkopolskie Voivodship (533,000), Małopolskie Voivodship (520,000), Dolnośląskie Voivodship (473,000) and Pomorskie Voivodship (382,000).

These voivodships also boast the highest number of students. In the 2024/2025 academic year, there were 288,000 in Mazowieckie Voivodship, 152,000 in Małopolskie Voivodship, 134,000 in Wielkopolskie Voivodship, 125,000 in Dolnośląskie Voivodship, 111,000 in Śląskie Voivodship, and 93,000 in Pomorskie Voivodship – and together, these figures make up some 70% of the national student population. Unemployment rates were also relatively low in these regions. In March 2026, the registered unemployment rate in voivodships stood at 3.9% in Wielkopolskie, 4.5% in Mazowieckie, 4.9% in Śląskie, 5.1% in Małopolskie, 5.7% in Pomorskie, and 5.8% in Dolnośląskie – compared to a 6.1% national average. All of these voivodships, with the exception of Śląskie, recorded a positive net migration balance in the first half of 2025, with the highest figures in Mazowieckie and Pomorskie Voivodships; the remaining voivodships in the country recorded a negative net migration balance.

These same five regions are also home to Poland's key economic infrastructure, including major roads, railway lines, ports, airports, elements of the energy system, as well as transshipment and storage centres. By the end of 2025, Poland had approximately 5,500 km of highways, including 1,900 km of motorways and 3,600 km of expressways, essentially linking all the major urban centres; in 2026, more than a 1,000 km of roads were under construction, primarily to fill in the gaps in the highway network in northern and eastern Poland.

There are approximately 19,100 km of standard-gauge railway lines in the country, with the highest network density in southern and western Poland; Wielkopolskie Voivodship has the longest track network (1,900 km), while Śląskie boasts by far the highest density of railway lines (15.28 km per 100 km²); however, the highest number of rail journeys was recorded in Pomorskie Voivodship – an average of 35 per resident in 2025, which is three times the national average. In 2024, only 1.2% of the network allowed speeds over 160 kph, 20.4% allowed speeds of 120–160 kph, and 19.1% allowed speeds of up to 60 kph.

According to GUS data, seaports serviced 128 million tonnes of cargo in 2025, of which 58.8% was handled by Gdańsk, 16% by Gdynia, 15.4% by Świnoujście, and 8.6% by Szczecin. In air traffic, according to data from Poland's Civil Aviation Authority, Warsaw takes the lead (24.08 million passengers in 2025, as well as 137,100 tonnes of cargo, representing 64.1% of the national total), followed by Kraków-Balice (13.24 million passengers), Gdańsk (7.38 million passengers), and Katowice (7.29 million passengers and second place for cargo, with 33,500 tonnes); Wrocław (4.9 million passengers) and Poznań (4.13 million) also handle significant passenger traffic.

According to GUS data, there were 40 intermodal terminals operating in the country in 2024, of which 4 were maritime and 36 were land-based. Container transshipments totalled 82.6 million tonnes: according

to GUS, 30.9 million tonnes were transported by sea, 28.7 million tonnes by road, and 23 million tonnes by rail. After Gdańsk and Gdynia, the largest transshipment centres include Wielkopolskie Voivodship (Poznań–Swarzędz–Gądk) and Łódzkie Voivodship (Łódź–Kutno–Radomsko). In 2025, Poland had 36.6 million m² of warehouse space, with Mazowieckie Voivodship taking the lead (7.34 million m²), followed by Śląskie (6.19 million m²) and Dolnośląskie (5.31 million m²). In Q1 of 2026, Mazowieckie Voivodship led the way with most new warehouse space additions (139,500 m²), followed by Pomorskie (139,100 m²) and Śląskie (102,700 m²).

Today, there are significant factors driving changes in Poland's economic geography, including the energy transition and growing national security requirements, particularly in the wake of Russia's invasion of Ukraine in 2022. These factors are linked to investment projects that are set to relatively bolster the economic importance of Poland's northern regions, including the diversification of energy sources and the phasing-out of coal in the energy sector, along with the new infrastructure these ventures require, as in the case of the Lubiatowo-Kopalin nuclear power plant in Choczewo or the FSRU terminal in the Gulf of Gdańsk.

The growing importance of access to low-carbon energy incentivises the construction of offshore wind farms. With the rising threat from Russia, as well as Finland and Sweden joining NATO in 2023–2024, the Baltic Sea is playing an increasingly strategic role in the field of defence. New technological trends are fuelling the growing importance of data centres, which Pomerania may be an attractive location for, partly due to its proximity to low-carbon energy sources. **This is a very favorable picture of northern Poland, as it features a concentration of future-oriented investments that are also strategically important to Poland as a whole.** From the state's perspective, however, these developments do not necessarily translate to a growing rivalry between Pomerania and Silesia, but rather the opportunity for the country's more comprehensive growth, realised through the complementary nature of their respective potentials. According to the Polish Investment and Trade Agency (PAIH), Silesia's greatest avenues for development include projects in the automotive, logistics, energy, medical, information technology, green economy, and emerging industries sectors.

Poland's northern voivodships – economy, society, infrastructure



THE IMPORTANCE OF THE NORTH TO THE POLISH ECONOMY

According to preliminary estimates by the GUS for 2024, Pomorskie Voivodship accounts for 6.0% of Poland's GDP (PLN 219.6 billion), whilst Zachodniopomorskie Voivodship accounts for 3.5% (PLN 129.3 billion). Together, this makes up 9.5% of national GDP, comparable to the figures for Wielkopolskie (9.8%), higher than Dolnośląskie (8.3%) or Małopolskie (8.1%), but lower than Śląskie (11.5%). There is significant disparity in the level of prosperity across the voivodships. In 2024, GDP per capita in Pomorskie Voivodship stood at 95.3% of the national average (PLN 92,800), while in Zachodniopomorskie Voivodship it was 81.9% (PLN 79,800).

Regardless of the size of the local economy, the Coastal Region plays a very significant role due to its importance for Poland's energy security and international trade, enabled by its extensive port, rail, and energy infrastructure. To illustrate: at the Port of Gdańsk in 2025, liquid fuels accounted for 49.3% of turnover (39.6 million tonnes, including 37.4 million tonnes of crude oil); the Świnoujście terminal handled almost 6 million tonnes of LNG in 2025 (+30% year-on-year), which in practice meant it was operating at full capacity. This

was the result of the expansion of the facility, completed in 2024, which increased its regasification capacity from 6.2 to 8.3 billion cubic metres per year. This accounts for over 36% of the LNG that was transported via the Polish distribution system in 2025.



SOCIETY

Pomorskie and Zachodniopomorskie Voivodships face different demographic situations. The population of Pomorskie Voivodship is relatively stable. According to GUS, in mid-2025, it stood at 2.36 million. In 2024, Pomorskie, alongside Małopolskie, had the youngest age structure (with a median age of 41.7 years). The population of Zachodniopomorskie Voivodship stood at 1.61 million; it is among the oldest and fastest-ageing in Poland (with a median age of 44.5 years), and is facing a significant population decline.

The voivodships also differ in terms of the labour market. In March 2026, the registered unemployment rate in Pomorskie stood at 5.7% (53,500 unemployed) and at 8.2% in Zachodniopomorskie (48,100). The average monthly gross wage in the enterprise sector in March 2026 was PLN 9,914 in Pomorskie Voivodship and PLN 8,636 in Zachodniopomorskie Voivodship, compared with a PLN 9,652 national average. At the same time, in Zachodniopomorskie, healthy life expectancy at birth stood at 63.11 years for men and 66.19 years for women, among the highest figures in the country; in Pomorskie, these figures were 61.97 and 65.27 years respectively, which corresponds to the national average. Zachodniopomorskie Voivodship has three times fewer students, despite having a population that is 32% smaller.



ECONOMY

In Pomorskie, the economy is dominated by the Tricity area, the most important urban centre in the north of the country, as well as a magnet for migration from across northern Poland. The wider Gdańsk–Gdynia–Sopot metropolitan area, which comprises 61 municipalities and counties, has a population of nearly 1.7 million, over two-thirds of the voivodship's population. In March 2026, registered unemployment stood at 2.8% in Sopot, 3% in Gdynia and 3.4% in Gdańsk, but ranged between 10.7 and 12.2% in the counties of Lębork, Czluchów, and Nowy Dwór Gdański.

In Zachodniopomorskie, the most important urban centre is Szczecin, with a population of approximately 385,000. In terms of economic indicators, the city outperforms the rest of the region: in March 2026, the registered unemployment rate there stood at 4.3%, while the average wage was PLN 9,883. At the same time, unemployment stood at between 15.8 and 17.7% in the counties of Białogard, Choszczno, Sławno, Łobez, and Świdwin. Koszalin (105,000 residents) and Słupsk (85,000 residents), situated in the central part of the coast, play a much smaller economic role. Pomorskie Voivodship has a more concentrated population: around 30% of its residents live in the Tricity, while less than 25% live in Szczecin.



INFRASTRUCTURE

Port facilities are fundamentally important in Pomorskie and Zachodniopomorskie Voivodships. The Port of Gdańsk plays a dominant role, as the largest container port on the Baltic Sea – in 2025, it handled 2.77 million TEU (Twenty-foot Equivalent Unit – a unit of measurement corresponding to the capacity of a standard 20-foot container). In the same year, Gdynia exceeded 1 million TEU for the first time, while Szczecin passed 100,000 TEU for the first time. Port infrastructure is developing across all these centres: for example, in 2025,

the Baltic Hub terminal in Gdańsk opened its third deep-water pier, increasing its overall capacity to 4.4 million TEU per year – more than all other Polish ports handled in total in 2025. In 2024, investment projects worth over PLN 3 billion were completed to improve rail access to the Ports of Gdańsk and Gdynia, while PLN 1.67 billion was spent on investments improving access to the Ports of Szczecin and Świnoujście; projects improving the facilities' sea accessibility were completed in previous years. In the second half of 2026, renovation work was launched on the Oder River trunk line, a major railway running from Dolnośląskie to Zachodniopomorskie Voivodships, with the aim of enabling more efficient connections to the ports.

In terms of major roadworks projects, the final section of the S6 expressway from Szczecin to Tricity, which links the main urban centres of the two coastal voivodships, was completed in 2026. In 2025, the 32-kilometre Tricity metropolitan bypass road was opened, linking the S6 with the S7 expressway and the A1 highway. Also in 2025, the 33-kilometre section of the S3 between Świnoujście and Troszyn was opened, completing the expressway link between Western Pomerania and the Czech Republic. In air traffic, Gdańsk handled 7.38 million passengers (11.2% of passenger traffic in Poland) and 9,790 tonnes of cargo (4.6% of the total domestic air cargo volume) in 2025. The Szczecin-Goleniów Airport handled 451,000 passengers and 35 tonnes of cargo, less than 1% of the national total.



KEY DEVELOPMENT CHALLENGES

For the Coastal Region, key development challenges include, first and foremost, the considerable disparity in development levels between Pomorskie and Zachodniopomorskie Voivodships; the latter is facing a difficult demographic situation and a relatively low GDP per capita. Second, there is economic disparity within the voivodships, stemming from the dominant role of main urban centres. Third, transport infrastructure must be bolstered in Zachodniopomorskie Voivodship to better link the region with the rest of the country and enable improved utilisation of growing seaport capacity in the area. Fourth, new strategic investments must be integrated into the voivodship's economy and must be provided the necessary infrastructure and human resources to support them. Finally, the resilience of critical infrastructure along the Baltic coast must be improved, as any outages in the region could have downstream effects on the national economy. For example, at present, all rail transport from the deep-water section of the Port of Gdańsk passes through a single bridge.

The Baltic Sea Region – characteristics and significance

Definitions. The Baltic Sea region can be defined in a number of ways:

- first, it is the territory of the nine countries bordering the Baltic Sea (or, more narrowly, the coastal part of their territory), including Poland, Germany, Denmark, Sweden, Finland, Russia, Estonia, Latvia, and Lithuania;
- in political and institutional terms, it is an area of cooperation between countries at the international level – with individual frameworks having different members and functions, depending on their objectives;
- in a geographical and environmental sense, it is an area comprising the sea and the natural and human factors that affect it.

This interpretation is supported by EU documents and international agreements. For example, the EU Strategy for the Baltic Sea Region covers eight EU member states and suggests that this area is one of the most connected and integrated regions in Europe. Eurostat classifies the Baltic region as 67 individual NUTS 3 coastal areas (sub-regions the size of several counties). The 1992 Helsinki Convention defines the Baltic Sea region as including the sea itself and its entrance, bounded by the parallel running through Skagen in the Skagerrak, as well as specified internal waters; however, measures to combat marine pollution defined in the Convention are to be taken in the entire Baltic Sea catchment area.

Key cooperation frameworks in the Baltic Sea region

1

COUNCIL OF THE BALTIC SEA STATES (CBSS)

Coordinates cooperation in the Baltic Sea region, including in the areas of security and sustainable development. Poland held the presidency of the Council from July 1, 2025 to June 30, 2026. It has 11 members: Denmark, Estonia, Finland, Germany, Iceland, Latvia, Lithuania, Norway, Poland, and Sweden, as well as the EU.

2

BALTIC ENERGY MARKET INTERCONNECTION PLAN (BEMIP)

A high-level energy cooperation framework involving the European Commission, intended to integrate energy markets and foster cross-border links and energy security. The group includes eight EU member states: Denmark, Estonia, Finland, Germany, Latvia, Lithuania, Poland, and Sweden. Norway participates as an observer.

3

BALTIC MARINE ENVIRONMENT PROTECTION COMMISSION (HELCOM)

Also called the Helsinki Commission, its mandate is outlined in the Convention on the Protection of the Marine Environment of the Baltic Sea Area, an international agreement intended to protect the Baltic Sea environment from pollution originating from land, air and sea. Signatories include: Denmark, Estonia, Finland, Germany, Latvia, Lithuania, Poland, Russia, Sweden and the European Community; Russia's involvement in the work of the Commission has been suspended in March 2022.

4

COMMITTEE ON SPATIAL PLANNING AND DEVELOPMENT OF THE BALTIC SEA REGION (VASAB)

A cooperation framework for maritime and land-based spatial planning and territorial development. Representatives of the relevant ministries and regional authorities from seven countries make up the Committee: Poland, Lithuania, Latvia, Estonia, Finland, Sweden, and Germany, represented by officials from Mecklenburg-Western Pomerania and Schleswig-Holstein; participation of Russia and Belarus has been suspended since 2022. Poland holds the chairmanship of the group from July 2025 until the end of 2026.

5

NORDIC-BALTIC EIGHT (NB8)

An informal framework for political cooperation, bringing together the Nordic and Baltic states. It serves to coordinate positions on, among other things, foreign and European policy, security, and support for Ukraine. The NB8 has eight members: Denmark, Estonia, Finland, Iceland, Latvia, Lithuania, Norway and Sweden. Poland is not a member, but cooperates with the framework, for example through the NB8+/ NB+ format.



ENVIRONMENTAL CHARACTERISTICS

The Baltic Sea is one of the most environmentally sensitive bodies of water. It has an area of 415,200 km² and is a semi-enclosed sea, with limited water exchange with the North Sea; the average water exchange time is approximately 30 years. It is also a brackish and shallow sea: the average depth is 52.3 m, and the maximum depth is 459 m. This means that pollutants introduced into the water significantly affect the ecosystem – they persist for a long time, and recovery is slow. At the same time, HELCOM reports that the Baltic Sea catchment area covers an area more than four times the size of the sea itself, and is home to over 85 million people across 14 countries (including, alongside the Baltic states, Belarus, the Czech Republic, Norway, Slovakia, and Ukraine).

One of the key issues the Baltic Sea faces is eutrophication, that is the excessive accumulation of nutrients, including nitrogen and phosphorus, from agricultural, industrial, and domestic sewage runoff in the water, leading to a drop in oxygen levels. According to the latest available HELCOM data (2016–2021), the problem affects 93.8% of the Baltic Sea. Chemical pollution from hazardous substances, such as heavy metals, is another problem: in this category, HELCOM gave a negative assessment to 80% of the surveyed sea area. There's also the added danger posed by approximately 40,000 tonnes of chemical munitions, containing around 15,000 tonnes of toxic warfare agents, sunk in the Baltic Sea during World War II. Shipping is also a significant factor: according to HELCOM, the Baltic Sea is one of the most heavily trafficked bodies of water in the world. Environmental problems in the region are also exacerbated by global warming.



ECONOMIC SIGNIFICANCE OF THE REGION

The EU Strategy for the Baltic Sea Region puts the region's population at 85 million, which is approximately 19% of the EU total. This figure jumps to 148.4 million when the total population of Baltic Sea countries is taken into account. The World Bank says that in 2024 the eight EU Baltic countries generated 36% of the bloc's GDP. However, when counting only the Baltic Sea regions as defined by Eurostat, this figure will be around six times lower. Five EU capitals sit on the Baltic Sea – Copenhagen, Helsinki, Tallinn, Riga, and Stockholm. Poland's Tricity is situated on the coast, as is St Petersburg, Russia's second-largest city with a population of over 5 million; on the German side, Rostock, Lübeck, and Kiel are important ports and logistics hubs.

The countries in the region differ in terms of prosperity levels. Denmark, Germany, Sweden, and Finland are among the wealthiest countries in the EU and rank among the best in Europe in terms of quality of life and R&D spending (although this does not apply to the northern regions of Germany). Poland, Lithuania, Estonia, and Latvia are closing the gap left behind by the Eastern Bloc; their GDP per capita was around 80% of the EU average in 2024 (with Latvia performing slightly weaker). But the systemic importance of the economy of the Baltic Sea region extends beyond pure GDP figures alone. Maritime transport, ports and port cities, key energy and telecommunications links, combined with the growing importance of security considerations, have given rise to a dense network of interdependencies whose economic impact transcends the coastal area.



GEOPOLITICAL SIGNIFICANCE OF THE REGION

The geopolitical significance of the Baltic Sea has clearly increased following Russia's invasion of Ukraine. In its wake, Finland and Sweden joined NATO in 2023–2024 – as a result, all Baltic states except Russia now belong to the North Atlantic Treaty Organisation. On the one hand, this means better security for the Alliance's member states, which is why the Baltic is now commonly referred to as 'NATO lake'.

On the other hand, mounting tensions between European countries and Russia pose an increased threat to Baltic energy and telecommunications infrastructure, which is vulnerable to hybrid attacks. As the Baltic Sea can be accessed solely through the narrow Danish Straits, any acts of sabotage in that area could cause significant economic disruption. Due to the difficult environmental conditions in the Baltic, an ecological disaster could occur relatively easily, with potential consequences that would be difficult to remedy.

To frame it in practical terms: in September 2022, three of the four lines of the Nord Stream and Nord Stream 2 gas pipelines, situated on the Baltic seabed, were blown up; media reports suggest the explosion may have been the work of Ukrainian special operations forces targeting Russia. Russia also wields influence in the region through its so-called 'shadow fleet' – vessels designed to help Moscow circumvent economic sanctions. Its activities have been linked to damage to gas pipelines, as well as power and telecommunications cables. In order to strengthen its naval presence in the Baltic Sea, NATO launched Operation Baltic Sentry in January 2025.



POLAND'S PLACE IN THE REGION

In recent years, Poland has been steadily expanding its political, economic, energy, and security presence in the Baltic Sea region, becoming a significant regional player. According to Eurostat data, in 2025, Poland's GDP exceeded the combined GDPs of Finland and Sweden and was more than five times the GDPs of Lithuania, Latvia, and Estonia combined. In 2025, Gdańsk's Baltic Hub recorded the highest container throughput, measured in TEU, of all Baltic ports, ahead of St Petersburg in Russia and Klaipėda in Lithuania; it ranked second in terms of cargo throughput by weight, behind the Russian port of Ust-Luga. In total, Polish ports accounted for 32.3% of total container throughput across all Baltic ports. Thanks to infrastructure development, Poland is increasingly able to act as a link between the Baltic and Central Europe. Poland also occupies a very significant position on NATO's eastern flank: it lies on the Baltic Sea, bordering Russia's Kaliningrad Oblast to the north and Belarus and Ukraine to the east.



The Baltic Sea as source of future energy

Over decades, the role of the Baltic Sea in energy policy has evolved from that of a peripheral body of water to a key area in Europe's energy transition, supply chain security, and critical infrastructure resilience.

For Poland, this means that the center of gravity of its energy sector shifts north – from a system historically based on coal to a model strongly integrated into regional energy markets and new offshore, gas, fuel, and nuclear power infrastructure.

The Baltic Sea as one of the EU's energy hubs

In the 21st century, the importance of the Baltic Sea in the EU's energy policy has been steadily growing. Following Russia's invasion of Ukraine in 2022 and the resulting energy crisis, which prompted a push to rapidly reduce imports of Russian energy resources, the Baltic Sea has become one of the key areas for the reorganisation of Europe's energy system – both in terms of supplies and the development of new low-carbon infrastructure. It currently serves at least three functions within the energy sector:

- a platform for the development of low-carbon energy systems,
- an area for energy and industrial integration,
- an area for environment and critical infrastructure protection.

Ports, terminals, generation facilities, and transmission and distribution infrastructure are of essential importance to the energy security of countries in the region, as they provide access to global natural resource markets, enabling said countries to secure economic advantages and build a privileged position in energy markets.

POLAND'S STRATEGIC INVESTMENTS IN THE BALTIC SEA REGION

SOURCE: OWN ANALYSIS.

- 

LNG terminal
- 

Naftoport
- 

Nuclear power plant
- 

Offshore wind terminal
- 

FSRU terminal
- 

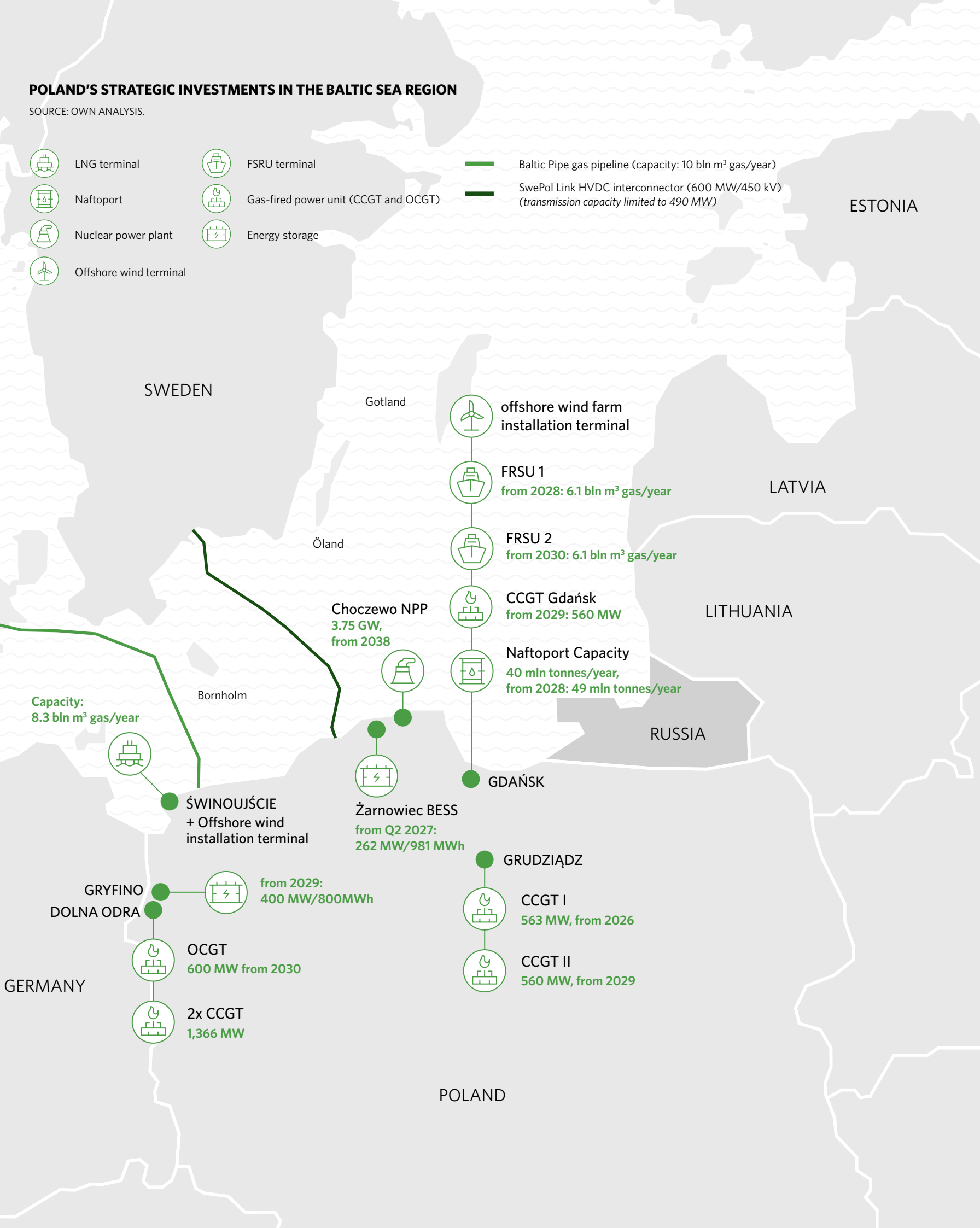
Gas-fired power unit (CCGT and OCGT)
- 

Energy storage

- 

Baltic Pipe gas pipeline (capacity: 10 bln m³ gas/year)
- 

SwePol Link HVDC interconnector (600 MW/450 kV)
(transmission capacity limited to 490 MW)



Platform for the development of low-carbon energy systems

The EU Strategy for the Baltic Sea Region (EUSBSR), adopted in 2009, serves as the starting point for Baltic cooperation¹. The document focuses on environmental protection, regional integration, and economic development, although specific objectives are set at national level. In the energy sector, the Baltic Energy Market Interconnection Plan (BEMIP) remains the key instrument for cooperation² – a working group coordinated by the European Commission including Denmark, Germany, Estonia, Latvia, Lithuania, Poland, Finland, and Sweden, with Norway as an observer. **The region is one of the largest recipients of EU funding,** including from the Connecting Europe Facility (CEF) and the EU's Projects of Common Interest (PCI) mechanism.

The priority importance of energy integration in the Baltic Sea region is confirmed by the EU's 'Fit for 55' package and the 2022 REPowerEU plan. The region has been identified in these documents as one of the key areas for the development of offshore wind energy, transmission infrastructure, hydrogen-based power, and new routes for gas and oil supplies following the reduction in imports of Russian energy resources. Investments in this area have accelerated the transformation of the European energy supply system – shifting from a model based on Russian gas pipelines towards north-south interconnections and offshore infrastructure in the Baltic Sea.

In light of this, **the construction of the Lubiatoŵo-Kopalino nuclear power plant in Choczewo is of fundamental importance to Poland.** The US Westinghouse–Bechtel consortium has been commissioned to build three AP1000 reactors with a combined capacity of 3,750 MWe, while the project's investor is the state-owned company Polskie Elektrownie Jądrowe (PEJ). Alongside favorable geological and social conditions, the site was chosen due to proximity to the Baltic, as the reactor will use an open-loop cooling system based on seawater. This is particularly important given Poland's growing water shortages and increasingly frequent hydrological droughts, as it limits the plant's consumption of inland water resources, which the energy sector, industry, agriculture, and municipal services all compete for.

The Baltic offers very favourable conditions for the development of offshore wind power. According to the International Energy Agency, the capacity factor for this type of installation in the Baltic is 45–65%, significantly higher than in the waters of the US, China or Japan³. Other advantages include shallow waters, low wave heights, and smaller tides than, for example, in the North Sea. Denmark and Germany are leading the way in the development of offshore power in the region, although Poland and Lithuania also have ambitious plans to build wind farms.

In the EU's 2020 Offshore Renewable Energy Strategy⁴, the Baltic has been identified – alongside the North Sea – as one of the two main areas for offshore development in Europe. In line with the intentions of the region's countries as set out in the 2022 Marienborg Declaration, the potential for offshore wind energy in the Baltic Sea is set to increase from around 3 GW at present up to 20 GW by 2030 and around 93 GW by 2050.⁵

1 European Commission, [Internet:] EU Strategy for the Baltic Sea Region, <http://gov.pl/attachment//7ea2640b-2f3c-425d-a686-3dfa49b14ecf>, The EU Strategy for the Baltic Sea Region (EUSBSR), [Internet:] <https://eusbsr.eu>.

2 European Commission, Baltic Energy Market Interconnection Plan, [Internet:] https://energy.ec.europa.eu/topics/infrastructure/high-level-groups/baltic-energy-market-interconnection-plan_en.

3 International Energy Agency, Offshore Wind Outlook 2019, [Internet:] https://iea.blob.core.windows.net/assets/495ab264-4ddf-4b68-b9c0-514295ff40a7/Offshore_Wind_Outlook_2019.pdf.

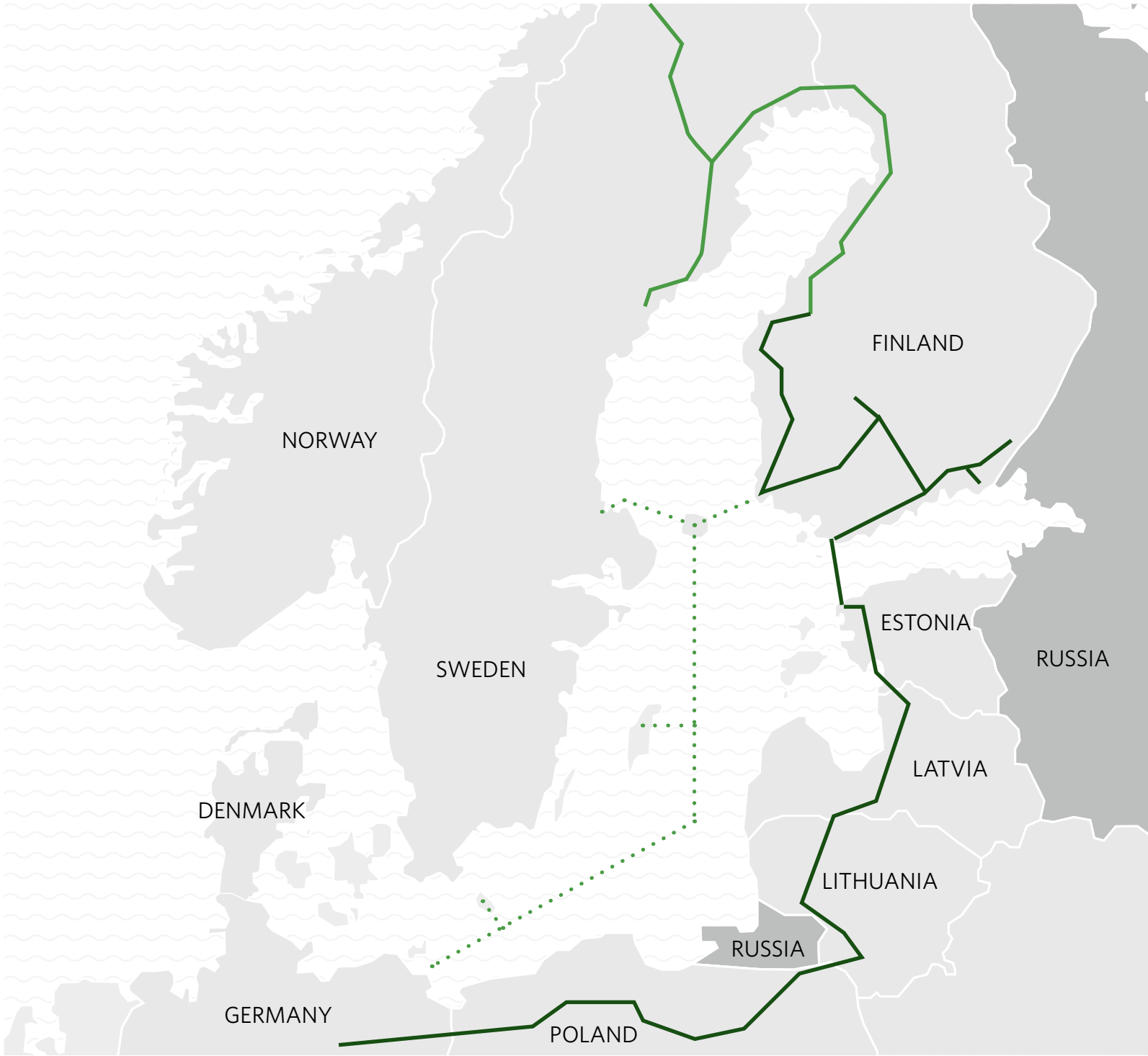
4 European Commission, Offshore renewable energy, [Internet:] https://energy.ec.europa.eu/topics/renewable-energy/offshore-renewable-energy_en.

5 The Baltic Sea Energy Security Summit, The declaration of energy ministers, [Internet:] https://www.en.kefm.dk/Media/637975454923038956/Declaration%20of%20Energy%20Ministers_310822.pdf

PLANNED OFFSHORE WIND FARMS IN THE POLISH PART OF THE BALTIC SEA

SOURCE: BOWE2H STRATEGIC ROADMAP.

Nordic-Baltic Hydrogen corridor
 Nordic Hydrogen Route
 Baltic Sea Hydrogen Collector (600-900 MW)

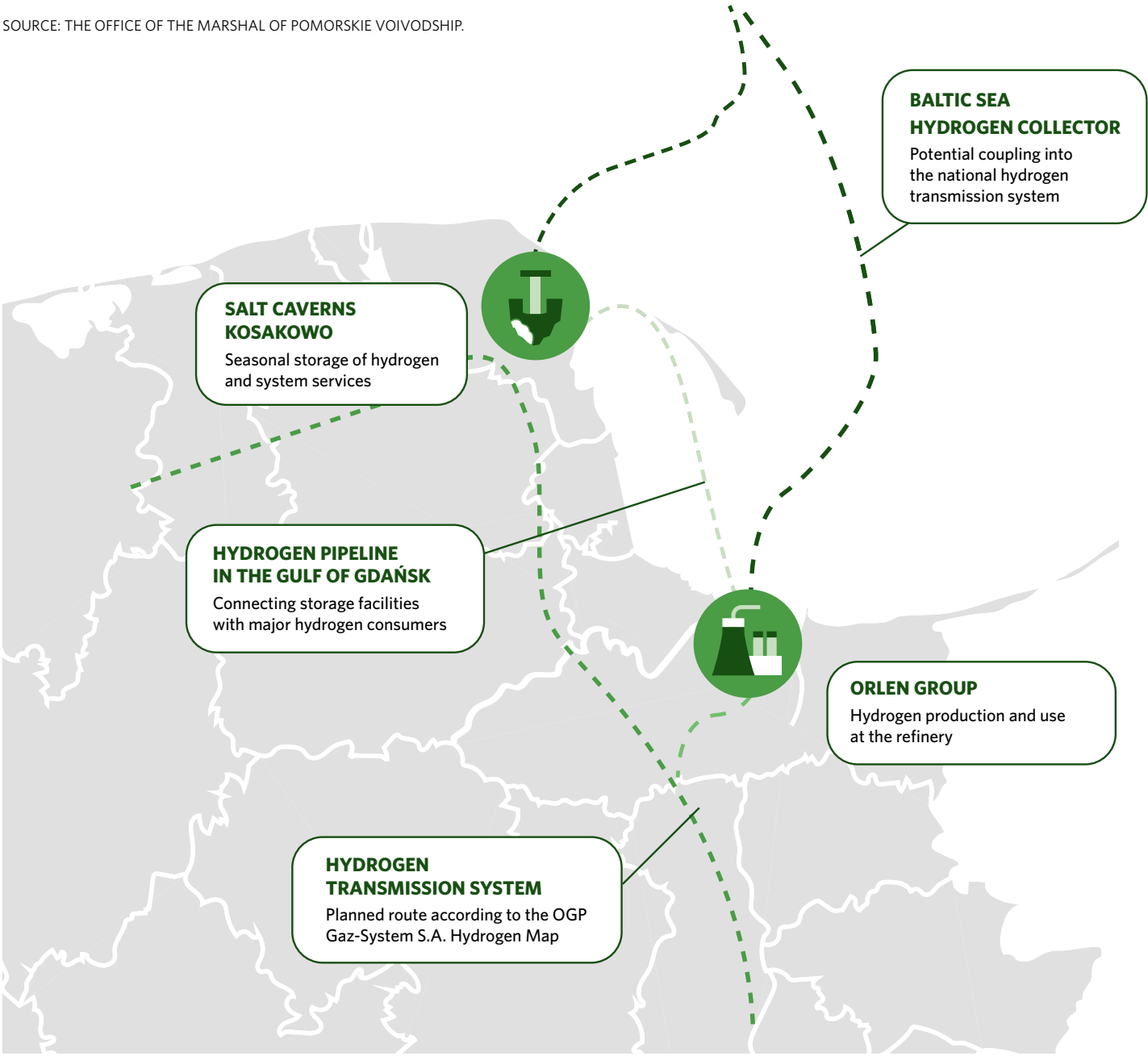


Among the projects currently under development, the Bornholm Energy Island is particularly significant – a Danish-German venture involving the construction of 3 GW of wind power capacity by 2030 and the creation of an energy transmission hub on Bornholm serving both countries. The project is developed by operators 50Hertz and Energinet. In February 2026, the companies signed an agreement to launch work on the project.

Hydrogen projects are also becoming increasingly important. A key initiative in this field is the Nordic-Baltic Hydrogen Corridor, a planned cross-border pipeline system for transporting renewable hydrogen that will link Finland, Estonia, Latvia, Lithuania, Poland, and Germany. It is intended to facilitate the transport of hydrogen and enable better utilisation of the region’s hydrogen production potential, including energy from offshore wind farms.

INTEGRATION OF HYDROGEN TRANSMISSION SYSTEMS

SOURCE: THE OFFICE OF THE MARSHAL OF POMORSKIE VOIVODSHIP.

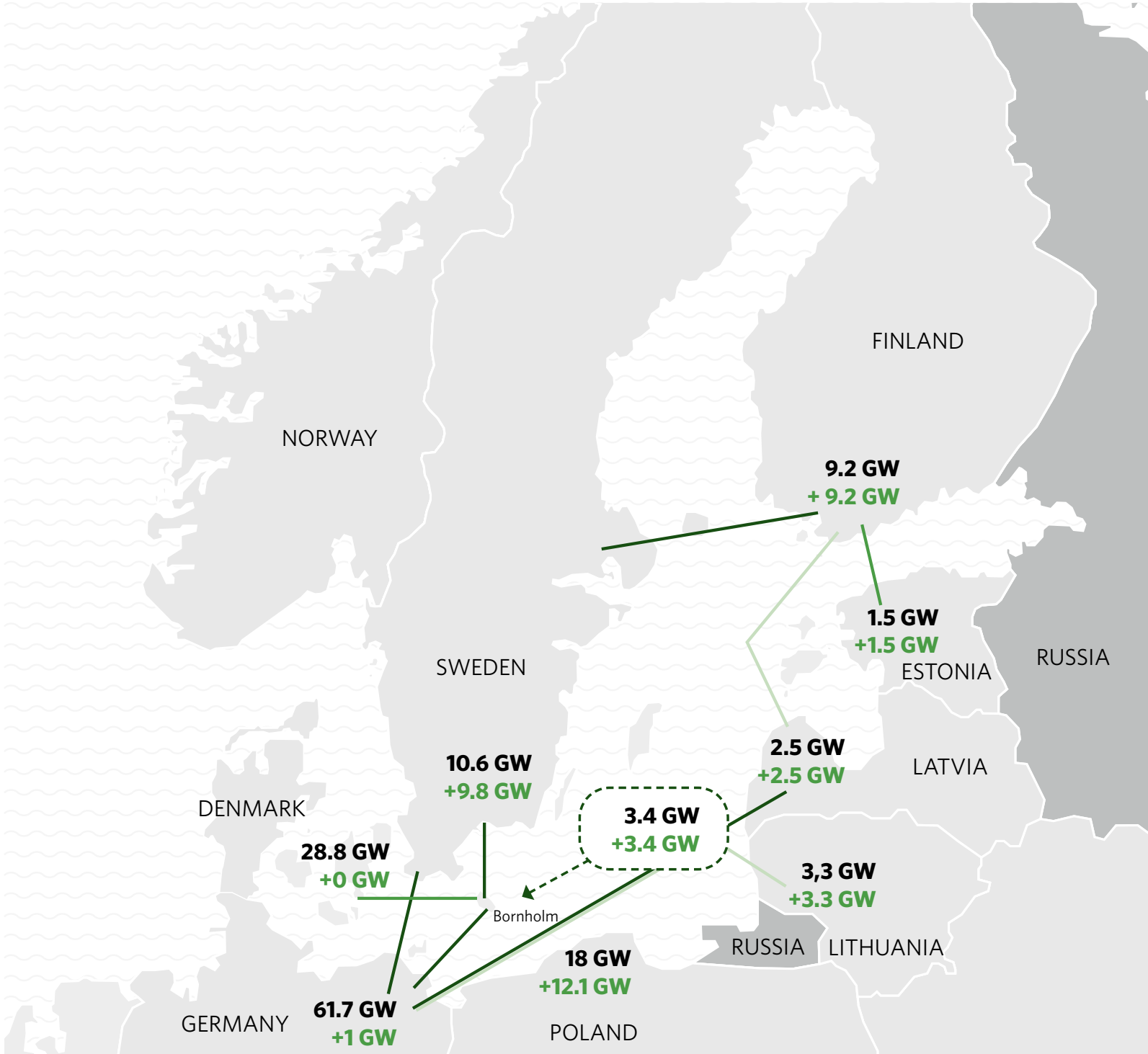


EXPANSION OF INTERCONNECTORS AND OFFSHORE WIND FARMS IN THE BALTIC SEA

SOURCE: 50HERTZ.

1,200-2,000 MW 900-1,200 MW 600-900 MW

[...] GW GW total generation capacity of offshore wind farms in 2040 + [...] GW increase in generation capacity of offshore wind farms compared to 2030



Area for energy and industrial integration

A highly integrated energy system has emerged around the Baltic Sea, forming an important area for cross-border energy trade and playing a key role in stabilising the European energy mix. Key power interconnectors include the Polish-Lithuanian LitPol Link, NordBalt between Lithuania and Sweden, Fenno-Skan 1 and 2 linking Sweden with Finland, EstLink 1 and 2 between Estonia and Finland, Baltic Cable between Germany and Sweden, and SwePol Link between Poland and Sweden. The process of synchronising the power grids of Lithuania, Latvia and Estonia with the Continental European System (CESA), completed in 2025, was also key, as it ended the region's dependence on the post-Soviet BRELL system.

Baltic gas infrastructure also carries regional and EU significance. The most important gas pipelines are the Baltic Pipe, linking Norway, Denmark, and Poland, and the Balticconnector between Finland and Estonia. There are numerous LNG terminals in operation, including those in Świnoujście in Poland, Klaipėda in Lithuania, and Inkoo in Finland, while Germany opened an LNG terminal in Lubmin on its Baltic shore. Poland is also building a floating storage and regasification unit (FSRU), which is due to be moored in the Gulf of Gdańsk in 2028, and is planning the deployment of a sister vessel, FSRU 2, alongside it. Some countries – such as Lithuania in Klaipėda – are developing 'small-scale LNG' facilities, used in maritime and road transport, as well as in local gas networks. The main suppliers of liquefied gas to the region include the US, Qatar, and Norway, further reinforcing the Baltic Sea's geostrategic importance.

The Baltic Sea is a hub for the import, storage, and distribution of crude oil and fuels. The Naftoport terminal in Gdańsk, owned by PERN, is particularly important to Poland; its capacity – thanks to the ongoing expansion – is set to increase from around 40 to 49 million tonnes per year from 2028. It handles the vast majority of crude oil supplies for the refineries in Płock and Gdańsk, as well as smaller volumes for the German plants in Schwedt and Leuna. Following the restrictions on Russian crude imports, Saudi Arabia, Norway, Guyana and the US have become the main suppliers of crude oil to Poland. Terminals in Butynė and Klaipėda in Lithuania (which supply crude to Orlen's refinery in Mažeikiai), in Ventspils in Latvia, and in Rostock in Germany also play a significant role in the regional fuel system. In Sweden, the Preemraff complex in Gothenburg handles oil supplies for the largest refinery network in the Nordic region.

Energy infrastructure development is also increasingly affecting other sectors of the economy. The construction of offshore wind farms is driving the expansion of ports, the growth of the shipbuilding industry, energy storage facilities, power grids, and component manufacturing plants. In Poland, an offshore installation terminal is already operational in Świnoujście, whilst a second facility of this kind is under construction in Gdańsk. A service port is operational in Łeba, and similar terminals are also under construction in Ustka and Władysławowo. Meanwhile, factories producing wind turbine components are located in Western Pomerania. Similar developments are taking place in Denmark and Germany, where the ports of Mukran and Rønne are among Europe's main offshore logistics hubs, competing with Polish ports for investment projects in the Baltic Sea to service.

The construction of the nuclear power plant in Pomorskie Voivodship will also be closely linked to the maritime economy. A dedicated marine offloading facility (MOLF) will be built, a jetty approximately 1 kilometre long, allowing oversized components delivered by sea to be unloaded directly, including the reactor vessel, steam generators, modular components, and power plant equipment. Some of these shipments will also be handled by the Ports of Gdańsk and Gdynia.

Access to relatively cheap, low-carbon energy and distribution infrastructure makes the region more attractive to energy-intensive industries, data centres, and hydrogen projects. In Poland, examples include several large-scale investment projects planned for Pomorskie Voivodship. The US-based company Twenty20 Energy Poland has announced the Red Griffin project, worth up to USD 10 billion, which will involve the construction of two data centres in Słupsk and Redzikowo, together with the necessary energy infrastructure. Meanwhile, KGHM is planning the PUCK project – the construction of Poland’s first deep-sea polyhalite mine, a raw material used in the fertiliser production. The value of the project is estimated at around PLN 10 billion; the reserves at the Mieroszyno deposit exceed 303 million tonnes, and target production could reach 4 million tonnes per year. Sweden and Finland, on the other hand, are utilising access to cheap energy from renewables to develop, respectively, the production of green steel (e.g. the HYBRIT and Stegra projects) and hydrogen and synthetic fuels (including the production of green hydrogen planned by P2X Solutions at the port of Oulu and Liquid Wind’s e-methanol project in Kokkola). Poland, meanwhile, is developing infrastructure in Pomorskie Voivodship for data centres, the ICT industry, and artificial intelligence.

Area for environmental and critical infrastructure protection

The growing importance of the Baltic as the EU’s energy hub simultaneously intensifies the scale of environmental, infrastructural, and security challenges. Around 97% of the pollution entering the Baltic Sea originates from land – primarily from industry, municipal services, and agriculture. The coordination of conservation measures is handled by the Baltic Marine Environment Protection Commission (HELCOM)⁶, operating under the Helsinki Convention⁷. The countries in the region are also implementing the Baltic Sea Action Plan⁸ aimed at reducing eutrophication and rehabilitating marine ecosystems.

At the same time, the development of energy infrastructure is driving the importance of protecting critical infrastructure, ensuring the security of supply routes, and strengthening the resilience of the region’s energy systems.

Turning from a south-facing energy industry to the Baltic

In 2025, domestic power stations generated 174.3 TWh of electricity (+1% year-on-year), whilst demand stood at 175.2 TWh (+0.4%). Hard coal- and lignite-fired units accounted for 50.8% of generation (compared with 56.2% in 2024) – supplying 55.1 TWh (-2.3% year-on-year) and 33.5 TWh (-7.1% year-on-year) respectively. Renewable energy sources accounted for 31.4% of the energy mix (54.7 TWh, +3.2% year-on-year), while gas accounted for 9.7% (17 TWh, +29.6% year-on-year). Industrial power stations generated 7.6 TWh⁹.

2026 has brought significant changes to the Polish power system. According to Polskie Sieci Elektroenergetyczne, national electricity consumption from January to August reached 113.8 TWh, up 4% year on year, while generation increased by 6.2% year on year to 116.6 TWh. At the same time, weak wind

⁶ Ministry of Infrastructure, HELCOM – the Helsinki Commission – the Commission for the Protection of the Marine Environment of the Baltic Sea, [Internet:] <https://www.gov.pl/web/infrastruktura/helcom---komisja-helsinki---komisja-ochrony-srodowiska-morskiego-baltyku>.

⁷ Convention on the Protection of the Marine Environment of the Baltic Sea Area, drawn up in Helsinki on April 9, 1992 (Journal of Laws 2000 No. 28, item 346).

⁸ HELCOM, Baltic Sea Action Plan, [Internet:] <https://helcom.fi/baltic-sea-action-plan/>.

⁹ Energy Market Agency, Statistical Report on Electricity, No. 12 (384) DECEMBER 2025, [Internet:] <https://www.ere.uw.edu.pl/badania-statystyczne/wynikowe-informacje-statystyczne>.

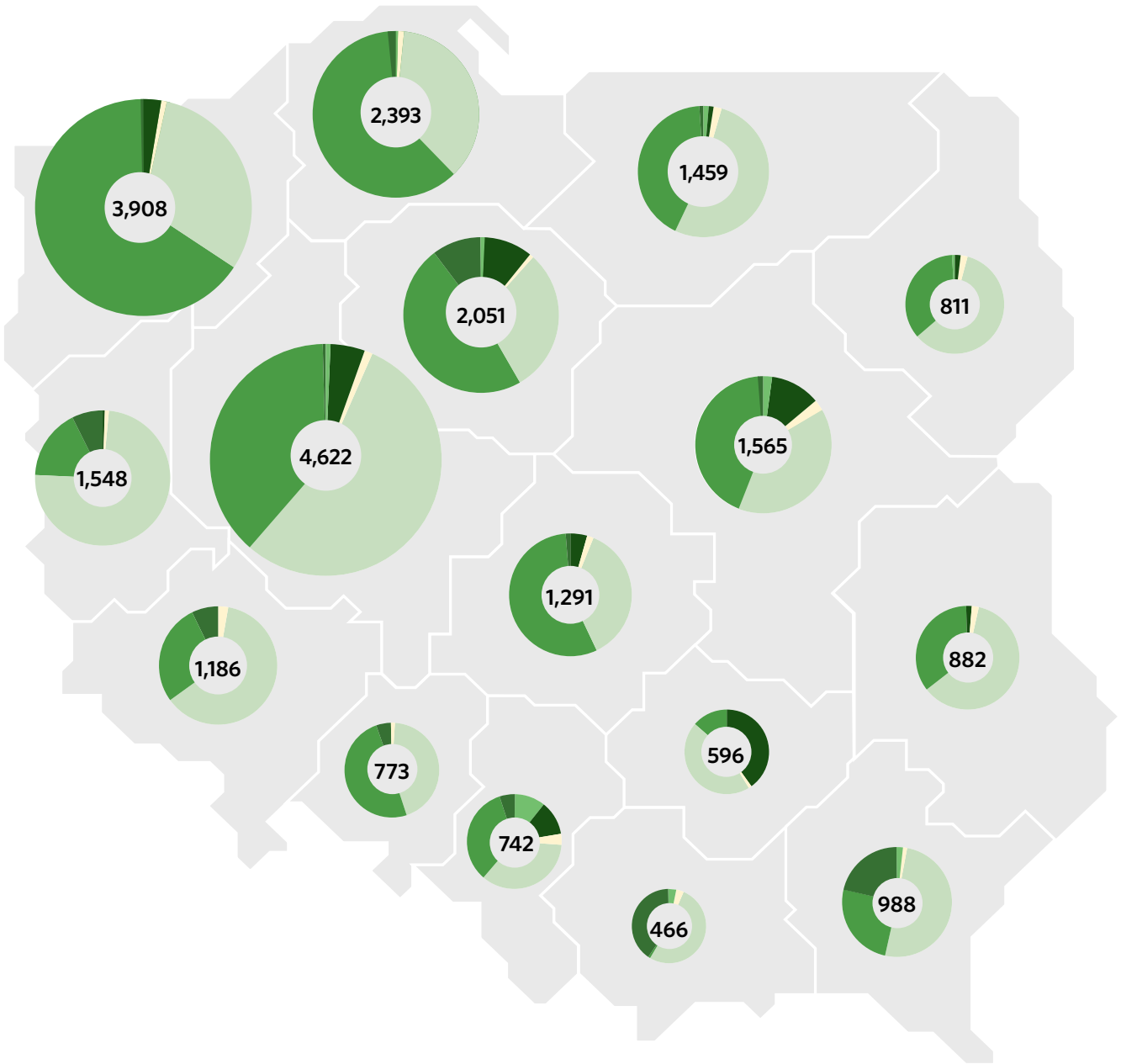
conditions reduced generation from onshore wind farms by nearly 6% year on year to 14.1 TWh, driving a 10.6% increase in generation from hard-coal-fired units, to 48.1 TWh. Generation from gas-fired units also increased by just under 6%, reaching 12.4 TWh.

These figures highlight the importance of energy investments in Pomerania – in nuclear power, offshore wind and the grid – for diversifying the national energy mix and reducing the Polish power system’s dependence both on fossil fuels and on sources whose output is highly weather-dependent.

POWER GENERATION CAPACITY OF RES INSTALLATIONS ABOVE 50 KW BY TECHNOLOGY (IN MW)

SOURCE: THE OFFICE OF THE MARSHAL OF POMORSKIE VOIVODSHIP.

- Onshore wind farms
- Hydropower plants
- Photovoltaic installations
- Waste-to-energy installations
- Biomass installations
- Biogas installations



Poland's energy geography

Due to the high share of coal in energy generation, Silesia has remained the cornerstone of Poland's energy and industrial development for decades. The vast majority of the country's coal-fired generating capacity was built in southern and central Poland. This includes the power plants in Opole, Kozienice, Jaworzno, Rybnik, and Połaniec, as well as lignite-fired power plants in Bełchatów and Turów. Energy-intensive industries developed in their vicinity, including the steel and mining industries in Upper Silesia, chemical plants in Puławy and Kędzierzyn-Koźle, and the metallurgical and automotive industries in southern Poland. Consequently, the National Electric Power System (NEPS) was designed primarily to meet the need to transmit electricity from the south to the north.

To date, the north has not been a major power generation centre, and has mostly been a consumer of power transmitted from the south of the country. Although it does play a part in balancing the National Electric Power System (thanks to the Żarnowiec and Dolna Odra power stations and the interconnector with Sweden), its development has been primarily driven by the maritime economy, ports, shipbuilding, logistics, and the fuel sector linked to the Gdańsk refinery and the Naftoport terminal.

New hub for Poland's energy industry

The northern regions are shifting from being energy consumers to becoming key areas for energy production and balancing. The development of offshore wind power, gas and fuel infrastructure, and the planned construction of the first nuclear power plant are moving the centre of gravity of the Polish energy industry north. The northern regions are developing their role as:

- an area of transformation of the national energy mix,
- an area concentrating strategic infrastructure for the import, storage, and transmission of energy and energy carriers,
- a source of cross-sectoral synergies and Poland's integration into the European energy market.

In 2025, approximately 10.5% of the thermal coal consumed in Poland was imported via infrastructure located on the Baltic Sea (primarily through the Ports of Gdańsk, Gdynia, Szczecin, and Świnoujście), **78% of gas** (the LNG terminal in Świnoujście and the Baltic Pipe gas pipeline), **97% of oil and fuels** (Naftoport terminal) and **2% of electricity** (the Poland–Sweden interconnector).

The development of renewables remains the cornerstone of the transformation of Poland's coastal north. Pomorskie and Zachodniopomorskie Voivodships have a combined renewables capacity of over 6 GW. This represents over 15% of the total renewables capacity in Poland. In Pomerania – taking into account only installations with a capacity exceeding 50 kW – renewables have approximately 2.39 GW of capacity, while in Western Pomerania the figure is approximately 3.9 GW. In 2024, they accounted for 10% and 16%, respectively, of the national generation from renewables¹⁰. The vast majority of new capacity comes from wind power and – to a lesser extent – from solar power. This is due to favourable weather conditions and the availability of land for investment.

¹⁰ Regional Office for Spatial Planning of Zachodniopomorskie Voivodship in Szczecin, Energy profile of the Western Pomeranian voivodeship regarding the use of renewable energy sources in electricity generation, [Internet:] https://rbgp.pl/wp-content/uploads/2025/03/karta-OZE_WZP_2024.pdf

PLANNED HYDROGEN TRANSMISSION INFRASTRUCTURE IN THE BALTIC SEA REGION

SOURCE: OWN ANALYSIS BASED ON THE MINISTRY OF CLIMATE AND ENVIRONMENT'S DATA.



The growth of renewables in Poland is no longer concentrated in the northern regions. While these areas remain an important target for such projects, increasingly dynamic growth – particularly in photovoltaics – is evident in Wielkopolskie and Kujawsko-Pomorskie Voivodships, as well as in parts of the central and eastern regions, including Mazowieckie, Łódzkie and Lubelskie Voivodships. This trend is driven by the development of PV projects in areas with lower site development pressure and the need for a more even distribution of generation sources: closer to end consumers.

The two coastal voivodships face different energy situations. In Zachodniopomorskie Voivodship, generation from renewables alone (7.27 TWh in 2024) exceeds regional demand by around 25–30%. In Pomorskie Voivodship, on the other hand, total electricity generation amounts to around 7.3 TWh, of which 4.4 TWh comes from renewables, which covers less than 80% of the region's energy consumption¹¹. In both voivodships, industry and households account for around 30–40% of consumption, with the rest consumed by the energy industry and transport¹².

Consumption by households remains relatively stable, but is rising in the energy sector and industry – northern Poland is becoming not only a centre of energy production, but also a region where local energy consumption is increasing, driven by an expanding industrial base and a growing energy industry.

11 The Office of the Marshal of Pomorskie Voivodship, 'The Energy Future of the Pomeranian Voivodeship: The Transformation of Energy Systems and the Region's New Role in Shaping the Country's Energy Security and Economic Development', [Internet:] <https://gospodarka.pomorskie.eu/wp-content/uploads/2026/05/ENERGETYCZNE-JUTRO-WOJEWODZTWA-POMORSKIEGO.pdf>.

12 GUS, Fuel and Energy Consumption in 2024, [Internet:] <https://stat.gov.pl/obszary-tematyczne/srodowisko-energia/energia/zuzycie-paliw-i-nosnikow-energii-w-2024-r-6,19.html>.

A significant share of investment projects related to fuel imports, security of supply, the development of new generation capacity and the balancing of the National Electric Power System is concentrated in the northern regions of Poland. The LNG terminal in Świnoujście, the Baltic Pipe gas pipeline, and the Kosakowo Underground Gas Storage Facility are already located there. The Kosakowo facility plays a key role in balancing the gas system and ensuring reliable gas supplies. The Naftoport terminal in Gdańsk and the depot in Dębogórze near Gdynia are important parts of the fuel supply system. Together with the transshipment infrastructure at the Tricity ports, the Szczecin–Świnoujście port complex, and the Gdańsk refinery with its pipeline link to the Płock refinery, they form Poland's main supply route for fuel and petroleum products.

Large-scale battery energy storage systems (BESS) are set to come online in Żarnowiec and Gryfino (Dolna Odra Power Station) in 2027 and 2028, with capacities of 262 and up to 400 MW and storage capacities of 981 and at least 800 MWh respectively. In 2030, a gas-fired unit (OCGT) with a capacity of approximately 600 MW will be brought online in Gryfino, complementing the two combined cycle gas turbine (CCGT) units with a total capacity of 1,366 MW completed in 2024; in Gdańsk, meanwhile, in 2029 will see a CCGT unit with a capacity of approximately 560 MW.

One of Europe's largest offshore wind energy development programmes is being rolled out in the Baltic Sea. The Baltic Power wind farm (1.2 GW, Orlen and Northland Power) has begun operations in 2026, followed in 2027 by the Bałtyk II and Bałtyk III wind farms (totalling 1.44 GW, Equinor and Polenergia) and Baltica 2 (approx. 1.5 GW, PGE and Ørsted). The Choczewo substation, brought online in July 2026, is of key importance, as it enables the feeding of power from offshore wind farms into the National Electric Power System, and is already serving that role for the first turbines of the Baltic Power farm. Importantly, achieving full operational capacity in this regard will require not only the completion of the offshore investments themselves, but also the completion of four 400 kV transmission lines running from the Choczewo substation inland. The first of the four power transmission lines from the Choczewo substation is already operational. This 19.5 km connection runs to the Żarnowiec substation. A nearly 90 km line to the Gdańsk Przyjaźń substation is scheduled for completion in 2028. Two further connections are due in 2029: a line of over 20 km connecting to the existing, upgraded Słupsk–Żarnowiec line, and an approximately 125 km line connecting to the Gdańsk Błonia–Grudziądz Węgrowo line.

Investment potential of the Baltic Sea

The Baltic Sea is becoming the heart of Poland's energy and industrial systems. However, the extent of the benefits it may offer to industry will depend on the region's ability to remain cost-competitive, secure a sufficient number of contracts, and gain access to a skilled workforce.

Nuclear power will change Pomerania's position in the NEPS

The three AP1000 nuclear reactors, with a combined capacity of 3.75 GW, planned at the Lubiatowo-Kopalino site by the Westinghouse-Bechtel consortium, will be capable of generating approximately 30–32 TWh of electricity per year, equivalent to around 17% of current national energy consumption. The power plant, operating as a baseload facility, will enhance the stability of the national energy mix and reduce Poland's reliance on fossil fuels and energy imports.

The nuclear power plant will change Pomerania's position within the national electric power system. The first unit alone is set to generate around 10 TWh of electricity per year, whilst the next two, in combination with offshore wind farms, gas-fired power stations, and existing renewable energy sources, will gradually transform the region from an energy importer into one of Poland's main energy-producing areas.

The project will prompt further infrastructure growth in northern Poland. This will include the construction of new 400 kV power lines and the expansion of substations, the upgrading of road and rail infrastructure, and the construction of a marine offloading facility (MOLF) to deliver outsize power station components. Local housing, service, and healthcare infrastructure will also need to be expanded. According to estimates, the construction of the power plant alone could provide temporary employment for around 10,000 people, not including indirect employment in services, logistics, construction, and industry.

A large and stable source of energy could also boost the appeal of Pomerania to industries requiring a reliable supply of large amounts of electricity. This includes data centres and digital infrastructure, but also new industrial ventures. This potential could be further bolstered by the planned Kashubia Green Industrial District, which intends to foster the development of the defence and tech industries in Pomerania. The plant project could boost the potential of Polish industry. Seven Polish companies – Mostostal Siedlce, Energomontaż Gdynia, Famak, Mostostal Kraków, Mostostal Kielce, Ferrum, and ZBUD – are already implementing NQA-1 quality standards, which enable participation in the global supply chain for AP1000 technology. For some of them, the Choczewo project could provide an opportunity to enter the international nuclear sector, acquire new expertise, and become permanently integrated into Westinghouse projects worldwide. Since 2020, PEJ has signed deals with nearly 500 Polish entities, with a total value of approximately PLN 1.20 billion. Nearly 800 of these contracts, worth approximately PLN 377 million, went to companies from Pomerania. These include both major infrastructure agreements and contracts for design, construction, geotechnical, roadworks, and support services related to the project. **In total, Polish companies are responsible for over PLN 2.2 billion of the project's value.**

One of the largest is a contract worth over PLN 160 million with Elektrotim to build power infrastructure. PEJ has also signed framework agreements with five Polish companies, including three from Pomerania, to repair local roads, while Budimex will build a service road to the MOLF. Budimex will also carry out key preparatory works for the construction of the plant under a contract signed on August 5, 2026, with Bechtel for a net sum of PLN 208.88 million. Pomerania-based company DORACO is also involved in the project, with a commission from Bechtel for construction and support services for subsequent stages of geological and geotechnical surveys. Polish companies also play a significant role in providing construction site support services. In May 2026, Bechtel signed a contract worth nearly PLN 260 million with Unihouse, part of the Unibep Group, for the design and construction of modular housing facilities for approximately 1,000 project workers.

In September 2026, it signed a PLN 292.2 million net contract with a consortium comprising Polimex Mostostal, Polimex Budownictwo and Polimex Energetyka for the design and construction of two large-scale assembly halls at the site of the future power plant.

The extent of benefits the project will bring to Poland's economy will depend on how many Polish companies successfully complete the certification processes, maintain competitiveness in terms of cost and quality, and secure further contracts during the main phase of the power plant's construction. For some of them, the Choczewo project may open the door to the global nuclear energy market. The potential of

domestic industry in this area is relatively high – according to a study by the Polish Economic Institute¹³, almost 75% of companies interested in participating in the Choczewo project already have experience in the energy sector, while 29% have previously worked in the nuclear energy sector; half of the companies have also already incurred costs related to preparations for participation in the Polish nuclear power project. The greatest potential for domestic companies lies in construction and construction-related services, logistics and warehousing, and specialist services – entrepreneurs surveyed by the Polish Economic Institute estimate the possible share of local content in these areas at 49%, 39% and 36% respectively. However, for domestic companies to enter the more technologically advanced parts of the supply chain, further investment in skill development and certification will be required.

The project will turn the coastal municipality of Choczewo into one of the most important energy infrastructure hubs in Poland. With a population of just around 5,500 and over 17 km of coastline, the town has primarily been focused on agricultural and tourism; now, it's the site for some of Poland's most important projects – the nuclear power plant, new power grid infrastructure (the Choczewo substation, transmission lines carrying power from the power station and offshore wind farms inland) and the Zwartowo solar farm, Poland's largest, with a capacity of 204 MWp. Choczewo is fast becoming strategically important to the Polish energy industry.

Offshore facilities will reshape the role of ports and industry on the Baltic

According to the 'Energy Policy of Poland until 2040', the capacity of the country's offshore wind farms is set to reach approximately 18 GW, which could translate into the generation of approximately 43.7 TWh of electricity per year. Of this capacity, approximately 9.2 GW is to be installed in Pomorskie Voivodship, which, thanks to offshore wind power, will become an exporter of electricity as early as the turn of 2026 and 2027.

Although such dynamic growth is still far from certain, it is already boosting demand for industrial, logistics, and port services. In Szczecin, Vestas has opened a factory producing nacelles and hubs for offshore wind turbines and taken over an onshore blade production plant in Goleniów. The company is also considering building a factory for offshore blades in the Szczecin neighborhood of Skolwin. A Windar plant manufacturing towers and foundation components for turbines is set to come online in 2027. Thanks to these investments in Zachodniopomorskie Voivodship, almost all key components for offshore wind farms can be manufactured locally. The sector's growth is also raising the importance of local shipyards, metalworking and engineering firms, cable manufacturers, and logistics providers, generating new jobs and tax revenues. The extent of benefits this will bring to Poland's industry will, however, depend on securing continued orders and contracts in the offshore sector and maintaining competitiveness with factories and ports in Germany and Denmark.

Investors in the offshore sector are supported by the growing industrial base of Zachodniopomorskie Voivodship. Manufacturers of control and automation systems for turbines (KK Wind Solutions, Kongsberg), steel structures for the offshore sector (Smulders, JW Steel Construction), and assembly and transport equipment (Liftra) are already operating in the region. Tele-Fonika Kable is planning to develop

¹³ A. Juszcak, K. Lipiński, 'How Much of Poland Is in an Atom? Local content in the nuclear energy programme', Polish Economic Institute, Warsaw 2024.

logistics facilities for the cabling industry. A key asset of the country's northern regions is the presence of shipyards and companies from the maritime, metal, and engineering industries, which can gradually increase Pomerania's footprint in their European supply chains.

Offshore energy development could transform the operational model for smaller ports. Łeba, Ustka, and Władysławowo have been closely linked to the fishing industry for decades, but now that role is in rapid decline. Over the long term, repurposing them into service bases for wind farms will create new streams of income linked to the servicing of maintenance vessels, the leasing of port areas, and logistics services. Local authorities may also benefit through new jobs, additional tax revenue, and the development of local services.

At the same time, the growth of the offshore sector is driving the modernisation of port infrastructure. This includes the construction of new piers, the dredging of approach channels, and the expansion of hydrotechnical infrastructure, so that ports can handle vessels operating in the offshore sector. This is particularly important because, at present, there is no port capable of handling larger vessels operating in the Baltic Sea along the approximately 350-kilometre stretch of coastline between Świnoujście and the Tricity.

Pomerania's transformation hinges on power grids

The development of wind, gas, and nuclear power is driving the expansion of transmission networks, as well as the construction of new substations and infrastructure to enable power delivery from inland. Poland's state grid operator PSE is carrying out the largest expansion drive in its history, including the construction of the 400 kV Choczewo–Żarnowiec, Choczewo–Gdańsk Przyjaźń, Żarnowiec–Gdańsk Błonia, and Dunowo–Żydowo–Kierzkowo–Piła Krzewina lines. The Choczewo substation is already complete, while the Żarnowiec, Gdańsk Przyjaźń, Słupsk Wierzbęcino and Dunowo substations are either under construction or being expanded.

In Poland's coastal belt, the condition of the power grid – in terms of age and development level – lags behind the growth in renewable energy and growing energy security requirements. This is mostly due to insufficient capacity of existing power lines and transformer stations. The infrastructure owned by distribution system operators (DSOs) requires urgent upgrades and expansions to reduce excessive voltage drops in the grid, which are occurring with increasing frequency in parts of the voivodship, and enable the connection of additional renewable energy installations, including prosumer installations.

For example, Energa Operator is currently leading the largest upgrade programme in its history, to modernise and digitise the distribution network in northern and central Poland; valued at approximately PLN 40 billion by 2035, the programme involves the construction of over 11,000 km of new power lines and the modernisation of nearly 10,000 km of existing infrastructure. In 2025 alone, the company built and modernised around 4,600 km of power lines and connections, including 295 km of high-voltage lines, and modernised 87 110/15 kV substations. These efforts are intended to enable the connection of approximately 9 GW of new renewable energy capacity and around 200,000 new prosumers to the grid, as well as to improve grid operational safety in areas with the highest concentration of new energy sources. In practice, the pace of grid development will be one of the key factors determining the potential for further growth of new energy sources and industrial investment in Pomerania.

FSRU terminals will bolster Poland's gas hub

In 2028, a floating LNG terminal with an annual capacity of 6.1 billion m³ is set to be moored in Gdańsk Gulf. It will be the second facility of its kind in Poland, following the onshore LNG terminal in Świnoujście, in operation since 2016. With this new facility, **the annual capacity for gas imports into Poland will increase from 37.3 to 43.4 billion m³, and, after the completion of the FSRU2 - by a further 6.1 billion m³.** This will improve Poland's already high gas security, as well as provide the country with greater access to resources essential for the energy transition and the possibility of transiting gas to neighbouring countries. Cooperation with Ukraine and Slovakia offers the greatest potential in this area.

Both terminals will also improve the liquidity of the domestic gas market, including the volume of gas traded on the Polish Power Exchange. This, in turn, could boost the potential for developing a gas hub in Poland – a regional trading centre for the commodity – which would complement the transit role of the country's existing system. In this latter respect, however, the scale of potential benefits will be limited by the low level of competition in the Polish gas market.

Both FSRU terminals may also enhance Pomerania's significance as one of the main hubs for gas and energy infrastructure in Central Europe. Access to additional volumes of LNG will be important for the development of the gas-fired power generation sector, the chemical industry, fertiliser production, and potential hydrogen projects. However, the FSRU will not contribute to the development of the so-called 'small LNG' market, as the facility is not equipped with an LNG loading terminal for road tankers. This will prevent the scope of services provided from being extended beyond traditional regasification for transmission purposes and will deprive the facility of a potential revenue stream¹⁴.

14 A. Zawisza, FSRU 2: Between comfort and safety – IPE Report 1/2026, [Internet:] https://www.instytutpe.pl/wp-content/uploads/2026/02/FSRU_2-Raport-1_2026-IPE.pdf.



The Baltic Sea as NATO lake

With Finland and Sweden joining the North Atlantic Alliance in 2023-2024, the West has improved its prospects of ensuring the security of the Baltic Sea. To fully counter the Russian threat, it must make the most of its geographical position, build up its defence capabilities, and integrate its defence systems.

Geographical characteristics of the Baltic Sea region

The Baltic Sea lies entirely within the geographical and political boundaries of Europe, between the Jutland and Scania Peninsulas to the west and the Hel and Sambia Peninsulas to the east. Its northern arms are the Gulf of Bothnia and the Gulf of Finland, while in the south it has several bays and lagoons, including the Szczecin Lagoon, the Gulf of Gdańsk, the Curonian Lagoon, and the Gulf of Riga. The line between the northern and southern parts of the Baltic traditionally runs through the islands of Bornholm, Gotland and Saaremaa, belonging to Denmark, Sweden and Estonia, respectively. All three are strategically important, as are the Danish Straits (the Sound, the Great Belt, the Kattegat, and the Skagerrak), which connect the Baltic Sea with the North Sea.

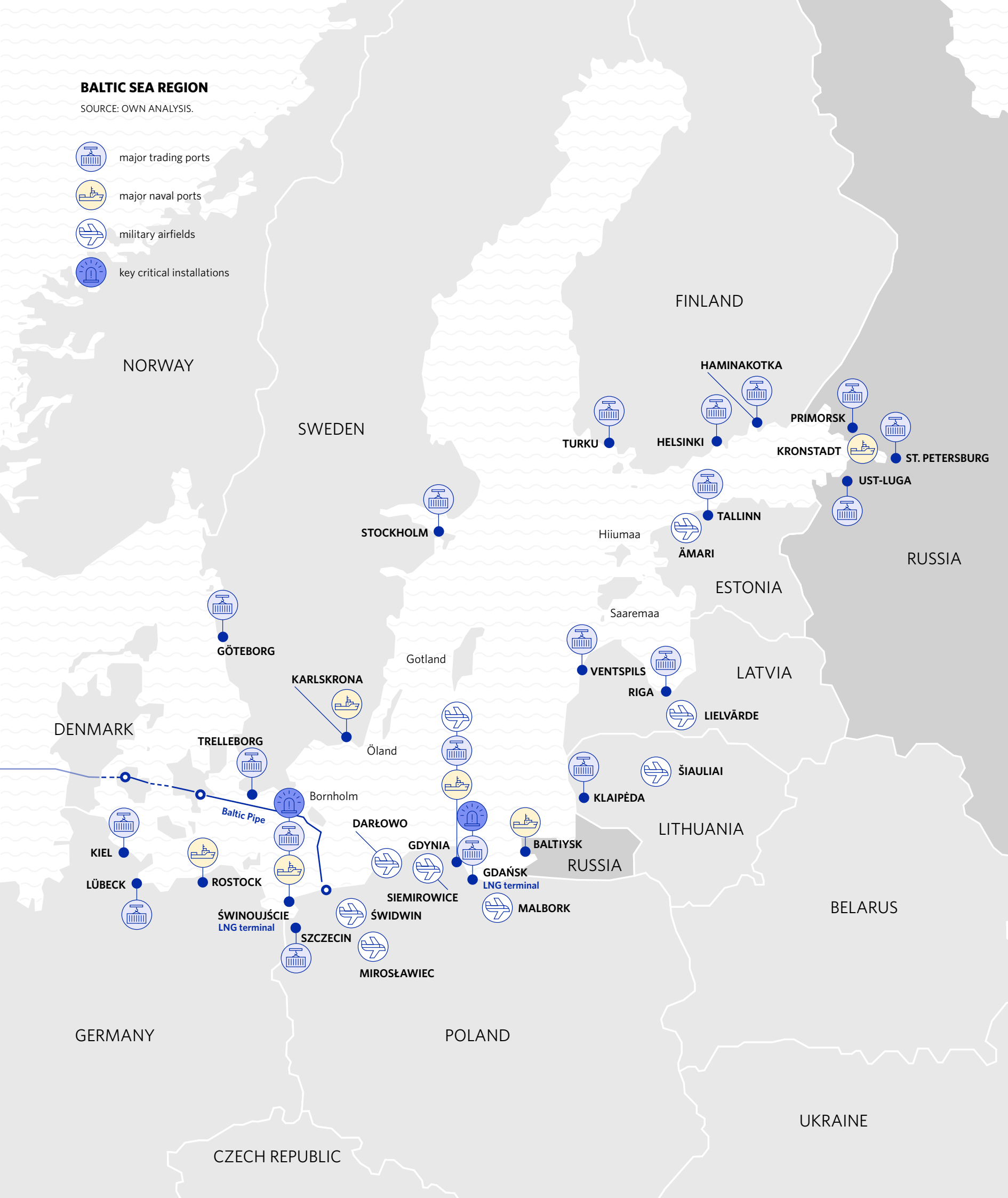
The maximum longitudinal range of the Baltic Sea is 1,300 km, and with the maximum latitudinal range reaching 600 km. The average depth is just over 50 m (with some depths exceeding 400 m). The Baltic boasts a surface area of 415,000 km² (making it a third bigger than Poland); its central area, excluding the Gulfs of Bothnia and Finland, is approximately 270,000 km². The distances between the coasts of Poland and Sweden range from 160 to 220 km, between Sweden and Estonia from 250 to 300 km, between Poland and Finland 620 km, and between Finland and Estonia 50 to 100 km. Commercial ships and ferries cover the greatest distances in a dozen or so hours, fast warships in a few hours, and jet aircraft in several dozen minutes. The Baltic Sea has low salinity but significant water stratification, which favours the submarine operations. In winter, it freezes over partially, mainly in the bays and gulfs. Sailing conditions are dictated by westerly and northerly winds and the so-called 'short wave', which is unfavourable for small vessels.

Nine countries, as already mentioned, are situated on the Baltic Sea: Denmark, Sweden, Finland, Russia, Estonia, Latvia, Lithuania, Poland, and Germany, five of which have their capitals on the coast: Copenhagen, Stockholm, Helsinki, Tallinn, and Riga. Including the entire populations of Russia, Germany, and Poland, over 290 million people live in the Baltic states, but that figure drops to 40 million within 100 km of the coast. Belarus, which is landlocked, and Norway, which is oriented towards the North Sea and the Atlantic, are also linked to the Baltic Sea.

BALTIC SEA REGION

SOURCE: OWN ANALYSIS.

-  major trading ports
-  major naval ports
-  military airfields
-  key critical installations



In a geostrategic context, the Baltic Sea lies at the heart of a potential North European theatre of war. The largest population and economic centres on the Baltic coast are:

- Tricity, Szczecin-Świnoujście, Rostock, Kiel, and Lübeck in the south,
- Copenhagen and Malmö in the west,
- Stockholm, Helsinki, and St Petersburg in the north,
- Tallinn, Riga, Klaipėda (significantly smaller in terms of population, but important within the Baltic states), and Kaliningrad in the east.

The largest city on the Baltic coast is St Petersburg in Russia, with a population of over 5 million – Russia’s second-largest city after Moscow and its western ‘window to the world’, which further underscores the importance of the Gulf of Finland and the Baltic Sea. Another key point on the Baltic coast for Russia, with outsize military significance, is the Kaliningrad Oblast, an exclave bordering Poland and Lithuania.

Geopolitical evolution of the Baltic Sea region since World War II

Situated in the heart of north-eastern Europe, the Baltic Sea region (BSR) was for centuries the stage for rivalries between regional powers: Sweden, Denmark, Prussia, Poland (and Lithuania), and Russia. While Western powers dominated the region before the 20th century, World War II shifted the balance in favour of Moscow (the Soviet Union), which gained control of the Baltic Sea through the annexation of Lithuania, Latvia, and Estonia, as well as influence over Finland, Poland, and East Germany. The Soviets exploited Sweden’s neutral status, as NATO countries – such as Denmark, West Germany and Norway – had limited access to the Baltic Sea. The Warsaw Pact established naval and air bases in Western Pomerania and in the East German state of Mecklenburg-West Pomerania. War plans envisaged an invasion of the Danish archipelago by the Polish Army and the bombing of Szczecin and the Tricity by NATO.

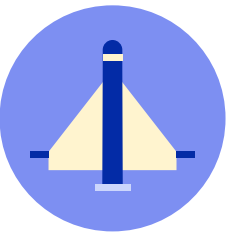
During the Cold War, the Baltic and the airspace above it were the stage of confrontation between NATO and the Warsaw Pact, but with no major escalation. The so-called Helsinki Process and the Final Act of the 1975 Helsinki Conference stabilised the situation and relieved some of the tension. The dissolution of the Soviet Union and the Warsaw Pact after 1989 left the West with a strategic advantage in the region. Estonia, Latvia, and Lithuania gaining independence from the Soviet Union, the reunification of Germany, Poland’s pro-Western shift and Finland’s rejection of its policy of accommodating the Kremlin (as well as the independence of Belarus and Ukraine) reduced Moscow’s influence. Russia retained the Kaliningrad exclave, situated on the borders of Poland and Lithuania, which joined NATO in 1999 and 2004, respectively. The Baltic Sea’s status as ‘NATO’s lake’ was cemented following the accession of Finland (2023) and Sweden (2024) to the Alliance. In an effort to contain these developments, Russia has stepped up its hybrid warfare efforts, combining unlawful and unconventional actions at sea and in the air, military provocations, organised migratory pressure at borders, cyber-attacks, and cognitive warfare.

Following these political and military changes, Russia’s ability to block the connection between the Baltic Sea and the Atlantic has diminished, but the entire Baltic region remains within range of its weapons: particularly aircraft equipped with missiles, ballistic missiles, and strike drones. The Russian Federation has committed significant funding to the militarisation of the Kaliningrad Oblast, deploying strategic radars and command centres, missile and air defence systems, and manoeuvre forces in the area. As a result,

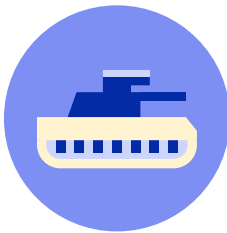
NATO has identified the Oblast as the only flashpoint in the Baltic region posing the threat of large-scale conflict. This threat increased following the invasion of Ukraine in 2014, when Russia began testing the seizure of the Suwałki Gap: a 65-kilometre-wide strip between Poland, Lithuania, the Oblast and Belarus. Since 2020, Russia has been integrating Belarus into its defence architecture and exercising military dominance over the country, including by announcing the deployment of nuclear weapons on its soil.

The Kaliningrad Oblast, bordering the Baltic Sea, serves as a platform for Russia to project its power and provides it with the easiest access to the Baltic Sea region. It is also one of the most heavily militarised administrative units of the Russian Federation in terms of both area (approximately 13,000 km² of land) and population (approximately 1 million). The Oblast includes the north-eastern part of the Vistula Spit, which it shares with Poland, and the south-western part of the Curonian Spit, which it shares with Lithuania. Russia’s naval forces are based at the Naval Base in Baltiysk, some 90 km as the crow flies from Poland’s Tricity. The Baltic Fleet in the Kaliningrad Oblast comprises four naval brigades and a coastal defence brigade. The air force contingent includes the 34th Composite Aviation Division with approximately 80–100 aircraft and helicopters, as well as two anti-aircraft regiments equipped with S-400 and S-300 systems. Ground forces include the 11th Army Corps, with the 18th Mechanised Division as its main tactical unit (comprising two mechanised regiments, a tank regiment, an artillery regiment, and a reconnaissance regiment). Corps-level support is provided by a brigade of Iskander-M operational-tactical missiles. The military assets deployed in the Oblast are currently being drained by their involvement in the war with Ukraine.

Situated 160 km from the open waters of the Baltic Sea, the Suwałki Gap fundamentally defines the BSR’s role in NATO’s defence doctrine in the event of a Russian attack on the Baltic States or Poland. Control of the railway and road links between Poland and Lithuania, alongside the ability to conduct unconstrained amphibious and airborne landings, will decide the effectiveness of support for Estonia, Latvia, and Lithuania. NATO established a rotational forward presence with multinational battle groups in the Baltic states and Poland in 2017 (and in Finland in 2023), is stepping up patrols and exercises in the Baltic Sea, and is integrating air policing missions with ground-based air defence (since 2025 as part of Operation Eastern Sentry). Seeing these actions as a threat, Russia has been calling for the withdrawal of NATO forces and engaging in provocations against Alliance forces using aircraft, ships, and drones. In a potential Russia–NATO war, the Baltic region will therefore be an area of offensive and defensive operations, such as:



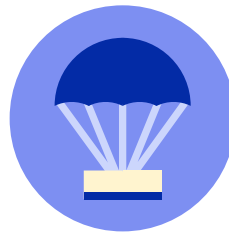
Russian attack from Belarus and the Kaliningrad Oblast on the Suwałki Gap via Lithuania or Poland



Occupation of north-eastern Estonia, particularly the border city of Narva



A raid into Latvia along the Pskov–Riga axis (approx. 250 km), with the aim of splitting the Baltic states



A simultaneous assault on the Baltic islands of Hiiumaa, Saaremaa, Gotland or Bornholm, supported by a naval and air blockade

THE CURRENT MILITARY CAPABILITIES OF THE BALTIC NATO MEMBER STATES

SOURCES: MINISTRY OF DEFENSE’S BUDGETS, IISS MILITARY BALANCE 2026, OFFICIAL GOVERNMENTAL PUBLICATIONS AND OTHER.

	NOMINAL DEFENCE SPENDING IN 2026		ARMED FORCES PERSONNEL INCL. NAVY		COASTAL AND MOBILE MISSILE FORCES	
DENMARK	3.5% of GDP	EUR 14 bln		16,000 Navy: 2,400		None
SWEDEN	2.8% of GDP	EUR 16.2 bln		14,800 Navy: 2,300		RBS-15 battalion (incomplete)
FINLAND	2.5% of GDP	EUR 6.3 bln		23,800 Navy: 3,100		4 batteries: RBS-15, Gabriel, Spike
ESTONIA	5.4% of GDP	EUR 2.4 bln		7,600 Navy: 650	 	Undisclosed number of Blue Spear launchers 6 HIMARS launchers
LATVIA	4.9% of GDP	EUR 2.16 bln		7,900 Navy: 500		None
LITHUANIA	5.4% of GDP	EUR 4.8 bln		17,300 Navy: 950		1 HIMARS launcher (of 8 ordered)
POLAND	4.8% of GDP	EUR 47.6 bln		216,000 Navy: 7,600	  	12 NSM launchers 18 HIMARS launchers approx. 160 K239 launchers
GERMANY	2.3% of GDP	EUR 108 bln		185,000 Navy: 15,300	 	456 combat aircraft 3 patrol aircraft
TOTAL	Average 3.95% of GDP	EUR 198.76 bln total		483,200 Navy: 31,300		Approx. 30 NSM, RBS-15 Blue Spear, and Gabriel cruise missile launchers 25 HIMARS launchers

	COMBAT AIRCRAFT AND MARITIME PATROL AIRCRAFT		COMBAT SHIPS			
DENMARK		21 F-35	 	3 frigates 2 combat support ships (corvettes)	 	12 patrol vessels 4 mine warfare vessels
SWEDEN		99 JAS-39 Gripen	  	5 corvettes 4 small missile ships 5 mine warfare vessels	 	4 submarines 186 coastal combat craft and boats
FINLAND		60 F/A-18 Hornet	 	8 small missile ships 8 mine warfare vessels		12 landing craft
ESTONIA		None (NATO rotational presence)		4 patrol vessels/icebreakers		4 mine warfare vessels
LATVIA		None (NATO rotational presence)		5 patrol boats		4 mine warfare vessels
LITHUANIA		None (NATO rotational presence)		4 patrol boats		3 mine warfare vessels
POLAND	  	14 F-35 (scheduled for delivery in 2026) 47 F-16 12 FA-50	  	2 frigates 1 patrol corvette 1 anti-submarine warfare corvette	  	3 small missile ships 20 mine warfare vessels 1 submarine
GERMANY	   	138 Eurofighter 65 Tornado 1 P-8A 2 P-3C	 	11 frigates 5 corvettes	 	12 mine warfare vessels 6 submarines
TOTAL		456 combat aircraft 3 patrol aircraft		16 frigates 13 corvettes 15 small missile ships		39 mine warfare vessels 11 submarines

These scenarios mean that NATO's dominance at sea, in the air, and along the eastern shores of the Baltic Sea is essential for an effective defence on land. Blocking Russian naval forces sailing from Kronstadt is crucial, a task that would fall to NATO forces operating from the high seas, Finland and Estonia. In the south, it will be vital to contain Russian operations launched from the Oblast, primarily by Poland and Lithuania, while in the east, the destruction of the key Russian airborne forces base in Pskov will be crucial. Coordinating these missions requires planning and operational cooperation, as well as the exchange of intelligence prior to any escalation of the crisis or conflict. In 2024, NATO launched a platform for these efforts in the form of Commander Task Force Baltic in Rostock, bringing together the navies of Germany, Denmark, Sweden, Poland, Finland, Estonia, Latvia, and Lithuania (with the participation of the United Kingdom, France, Italy, and the Netherlands), and tasking it with command of Operation Baltic Sentry, launched in response to the activities of Russia's so-called 'shadow fleet' in 2025. However, as the threats are of a hybrid nature, it is essential to involve the civilian border guard, maritime, customs, counter-intelligence, and police services of the Baltic region states in the exchange of information and the coordination of operations.

Military capabilities of countries and international alliances in the Baltic Sea region

Following Finland and Sweden's accession to NATO in 2023–2024, the balance of power in the Baltic region shifted in favour of the Alliance and the European Union. The West's capabilities are substantial compared with those deployed by Russia in its west, but they are also diverse and operationally inconsistent. Finland, Poland, and the Baltic states focus on the direct defence of their borders, while Germany and Sweden primarily deploy air and naval forces capable of posing a threat at greater distances. Poland's defence spending between 2022 and 2025 has strengthened its ground forces (missile and gun artillery, new-generation tanks, reconnaissance and strike drones), but also led to an unprecedented expansion of naval forces (coastal guided-missile vessels, air-defence frigates, submarine procurement), albeit on a smaller scale. Earlier purchases of next-generation F-35 aircraft and long-range air-launched weapons (JASSM and JASSM-ER cruise missiles) will make Poland capable of conventional deterrence and conducting offensive missions beyond its borders. The first F-35s entered service with the Polish Air Force in June. By the end of 2026, Poland will have a dozen or so of these aircraft, and two squadrons by 2030.

Finland's purchase of 64 F-35 aircraft, its investments in multi-role warships and coastal missile defence system, and its substantial artillery capabilities underpin its role as a northern bulwark blocking Russia's access to the Baltic Sea. To close off access to the Gulf of Finland by sea and air, coordination with Estonia and the other Baltic states is essential, as are the presence of allied air assets in Estonia and joint exercises of missile forces (including Poland) on the islands at the entrance to the Baltic Sea. This suggests that Russia would not be able to reach the Baltic Sea without attacking Finland and Estonia, which would trigger a NATO response.

The Kaliningrad Oblast is blocked by Poland to the south and by Lithuania to the east. The Alliance's main ground forces in the area include the Polish 16th Mechanised Division, deployed from Braniewo to Gołdap (with a NATO battlegroup attached to the 15th Giżycko Mechanised Brigade), and the Lithuanian Geležinis Vilkas Brigade, which is part of the 1st Mechanised Division currently being formed. NATO aims to rapidly neutralise military targets in Kaliningrad so that they do not pose a threat in the event of a larger-scale conflict. Such scenarios are practised, amongst others, by US strategic bombers.

At present, the launch of short-range ballistic missiles or cruise missiles from Kaliningrad at Vilnius, Gdańsk or Warsaw stands as the most pressing threat in the area. Air defence in Pomerania was reinforced in 2024 with a NATO installation in Redzikowo near Ślupsk, equipped with a long-range radar and SM-3 IIA interceptor missiles. The Polish capital is protected by the 3rd Air Defence Missile Brigade from Sochaczew, equipped with Patriot anti-ballistic missile systems. Lithuania has no defence against ballistic missile attacks, although it has procured Norwegian-American NASAMS systems. Neither Latvia nor Estonia have fielded ballistic missile defence systems, but both have purchased German short-range IRIS-T SLM systems to defend against aircraft, helicopters, drones, and cruise missiles. Poland currently fields a total of 16 launchers and 4 radars of the Patriot system and is set to quadruple this capability by the end of the decade.

Germany, Poland, Sweden, and Denmark provide strategic depth and operational support in the BSR. The strongest navy in the region, the German Deutsche Marine, boasts 11 frigates, five corvettes and six submarines, and is set to acquire a new generation of frigates, submarines, and maritime patrol aircraft by the end of the decade. However, it splits its forces between the Baltic Sea, the North Sea, and its allied commitments. Sweden is Baltic-oriented but weaker, with four submarines, seven corvettes (including five stealth Visby-class vessels), 11 patrol ships, and two reconnaissance vessels in service. Denmark is strategically located but the least well-equipped: it has five frigates, carrying a range of arms complements, and seven patrol ships, but no submarines. Finland is in the process of expanding its naval forces (in September, the country purchased four French-built frigates), and possesses significant coastal defence capabilities. Estonia, Latvia, and Lithuania have limited naval assets, focused on coastal warfare and mine counter-measures. Compared with its allies, the Polish Navy fares relatively well: it has two missile frigates (albeit underarmed), a submarine (not fully operational), three old missile corvettes, three modern minehunters (with three more on order), and as many as 20 older-generation minesweepers. Key procurement efforts currently underway include one Miecznik-class air defence frigate and one replacement new-generation submarine.

The Baltic Sea is protected by substantial NATO air forces. There are more than a dozen air bases of various types located close to the coast, providing capabilities for reconnaissance, patrol, anti-submarine warfare, maritime search and rescue, as well as air combat, strikes against land and sea targets, and the suppression of enemy air defences. The NATO Baltic Air Policing and Eastern Sentry missions ensure the permanent rotational presence of Western European aircraft in Estonia (Ämari), Latvia (Lielvārde), and Lithuania (Šiauliai), countries which do not have their own combat air forces. Fighter squadrons are stationed at Królewo Malborskie (Poland also has a drone squadron at Mirosławiec and plans to establish an F-35 squadron at Świdwin), Laage near Rostock, Vojens on the Jutland Peninsula, and Ronneby in southern Sweden. Finland has its main air bases inland, but uses roads as airstrips for dispersed air operations. The largest air forces in the Baltic region are fielded by Germany, Sweden, Finland and Poland – all of which are planning to purchase new equipment and modernise their existing assets.

Why the Baltic Sea is crucial to the region's security

The Baltic Sea accounts for approximately a quarter of the area of NATO's north-eastern flank theatre of operations, stretching from the Carpathian Mountains to the Gulf of Finland. The sea, its coastline, and its airspace are vital for the projection of power, access, and mobility, operational and strategic depth, production and repair capabilities, and the functioning of states and societies in times of crisis and

war. The Western bloc's geographical, economic, and military dominance gives it an advantage, but its cohesion, durability, and resilience are particularly vulnerable on the border between Russia and Belarus and the Baltic states: Lithuania, Latvia, and Estonia. **Only 450 km of their territory separate the Russian from the Baltic Sea, and at its narrowest point, the strip is barely 180 km wide, which reduces the scope for manoeuvre defence and increases the threat of a sudden attack – thereby emphasising the importance of allied support provided by and over the sea.**

Due to the local imbalance of power, Russia holds the upper hand on land, but its access to the sea is limited. This gives NATO an advantage in the air and at sea, including the ability to impose a naval and air blockade on Russian forces in the Gulf of Finland and the Baltic Sea. It will be crucial to counter the operations of the Russian air force, missile forces and the surface and submarine units of the Baltic Fleet in order to maintain NATO's air and naval support for the Baltic states, Poland, and Finland. Other essential operations will include countering a Russian airborne assault by units of the 76th Guards Air Assault Division from Pskov, defending manoeuvre forces and installations against missile attacks, and, in the second phase of a potential conflict, neutralising the adversary's offensive capabilities. This is why the expansion of medium- and long-range reconnaissance and strike capabilities, as well as air defence, is a priority for the Alliance's Baltic states. **Air and naval forces will also have to be dispersed so that in the event of a crisis or war, aircraft and ships can utilise allied bases prepared for this purpose.**

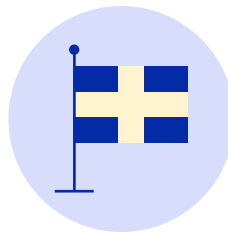
Maritime security sector in Poland and the region

For countries with access only to the Baltic Sea (Poland, Sweden, Finland, Lithuania, Latvia, Estonia), the coastline is a natural area for the shipbuilding industry: the production, maintenance and repair of warships. Over the decades of their existence, naval shipyards and naval bases have given rise to industrial centres linked to shipbuilding and the development of naval capabilities: communications and on-board systems, hydraulics and cabling, steel structures, and surface and underwater works. Germany and Denmark, which also have access to the North Sea, have concentrated their shipbuilding and related industrial potential between the Baltic Sea and the North Sea. Denmark's much weaker shipbuilding capacity is concentrated in the Baltic Straits. Russia presents a different case, given its continental size and scattered shipbuilding industry, including inland shipyards.

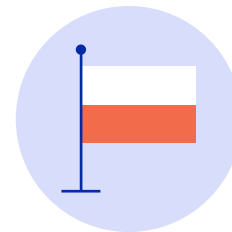
Within NATO and the European Union, three main areas can be identified, where shipyards, factories, design offices, and research and development centres and scientific institutions are concentrated:



KILONIA, LUBEKA
WISMAR, ROSTOCK



MALMÖ,
KARLSKRONA



GDYNIA, GDAŃSK
Szczecin is of lesser importance
to the defence industry

Germany has the strongest defence shipbuilding industry, with major players such as ThyssenKrupp Marine Systems (TKMS) and Rheinmetall Naval Systems Division (RNSD, formerly Blohm+Voss). TKMS, one of Europe's largest manufacturers of warships and submarines, has its main shipyards in Kiel and Wismar, while RNSD is based in Hamburg. The Swedish company Saab Kockums has its main shipyard in Karlskrona and supporting facilities in Malmö. The company is one of only three manufacturers of conventional submarines in Europe, but it does not produce large vessels or manufacture them on a mass scale.

The Polish shipbuilding hub includes PGZ Naval Shipyard in Gdynia*, Nauta Shiprepair Yard, also owned by PGZ, and assorted private shipyards working in partnership with the two: Remontowa Shipbuilding in Gdańsk and Crist in Gdynia. This capacity is complemented by manufacturers of equipment, on-board systems and arms, the most important of which are the Research and Development Centre of the Marine Technology Centre in Gdańsk (also part of the PGZ Group), Radmor S.A. (part of the private WB Group), and the private design office MMC Ship Design & Marine Consulting. Key foreign partners include the British firm Babcock, European conglomerates Thales and MBDA, the Swedish firm Saab, the Norwegian firm Kongsberg, and the German firm Rohde & Schwarz. Polish naval shipyards have recovered from the production slump of the 1990s–2010s and are back to working capacity.

Due to budgetary constraints, the Polish Navy decided against submarine procurements and cut orders for missile corvettes, with only one entering service, the patrol vessel ORP Ślązak. In the 2010s, however, the Navy changed tack and moved to acquire a host of new assets, including multi-role frigates, smaller vessels such as patrol boats or corvettes, modern submarines, and new-generation support and security vessels for operations in the Baltic Sea and beyond.

The Polish Navy's current assets do not yet meet its needs or the challenges before it, particularly in terms of surface and submarine forces, which now include two frigates, one patrol vessel, one anti-submarine corvette, three small missile vessels, one submarine, and twenty minehunting vessels (including three modern ones). Poland also has five transport-minelayer ships, useful for amphibious landings on the Baltic islands. Coastal defence capabilities, including the protection of strategic energy infrastructure and ports, are supported by special operations forces (Grom and Formoza units), which are capable of responding rapidly to threats and carrying out reconnaissance and offensive missions, for example in the Kaliningrad Oblast. Both the capabilities of the Navy and the capacity of the shipbuilding industry have been growing steadily since 2017. Poland's Armed Forces Development Programme for 2025–2039 include the following key naval procurement projects:

- 6 Kormoran II minehunters;
- 3 Miecznik-class multi-role frigates;
- 3 Orka-class submarines;
- 2 Delfin electronic reconnaissance vessels;
- 1 Ratownik-class rescue and deep-sea operations vessel;
- 2 hydrographic vessels;
- 2 fuel and supply vessels;

*PGZ stands for Polska Grupa Zbrojeniowa, or Polish Armaments Group, Poland's state-owned defence manufacturer – transl. note

- 1 logistics support vessel;
- 5 transport-minelayer vessels;
- Ostrosz multipurpose corvettes (number unknown);
- miniature submarines (number unknown).

The Polish Navy is intended to be a medium-sized naval force within NATO, capable of operating freely in the Baltic Sea and with some capacity for blue-water missions. It is unclear whether it will be capable of long-range precision strikes, as the Swedish submarines planned for procurement do not have this capability, and no long-range cruise missiles have been procured for the Miecznik-class frigates. Naval aviation is an important complement to surface and submarine forces. In 2019, Poland ordered four AW101 naval helicopters in an anti-submarine warfare configuration, with search and rescue capabilities. No ship-based helicopters for the Miecznik-class frigates have been procured yet. In 2024, Poland acquired two second-hand Saab 340 AEW aircraft, the first early-warning aircraft in the country's history, slated for service with the Naval Aviation Brigade. Optoelectronic reconnaissance capabilities are provided by General Atomics MQ-9 and Bayraktar TB2 unmanned aerial vehicles (UAVs), stationed at the 12th Unmanned Aerial Vehicle Base in Mirosławiec in Zachodniopomorskie Voivodship. The latest addition in this domain is a satellite observation system utilising four radar satellites, providing imagery regardless of weather conditions or time of day.

The industrial development of the Polish Navy is centred on the PGZ Naval Shipyard in Gdynia and its associated entities, both within and outside the PGZ group. Under the Miecznik programme, the shipyard has expanded and modernised its infrastructure (hull assembly hall, production hall, pier, floating dock), and signed new cooperation agreements, which have made it possible – for the first time in Polish history – to simultaneously build three large and complex frigates, while also servicing several other repair, maintenance, and production contracts. The hull of the first frigate, ORP Wicher, was launched on 13 August, while ORP Burza and ORP Huragan are at various stages of construction. The shipyard's further development will be linked to the programme to procure three Orka-class submarines, which is intended to integrate the shipbuilding industries of Poland and Sweden. Agreements on this matter were signed on June 29, 2026. Polish industry will be involved in the maintenance, servicing, and repair of the ordered A26 Blekinge-class vessels, while Sweden will purchase a rescue vessel built at the Naval Shipyard.



① **Delfin**

Press release from Remontowa Shipbuilding.



① **Orka**

Press release from SAAB.



① **Miecznik**

Press release from PGZ Naval Shipyard.



① **Kormoran II**

Press release from PGZ Naval Shipyard.



① **Ratownik**

Press release from PGZ Naval Shipyard.



The Baltic Sea as an economic gateway

The Baltic region's coastal areas are undergoing an economic transformation. The traditional industries on which they have previously relied, owing to geographical and historical circumstances, are now being supplemented or replaced by what's been described as 'high-opportunity' or 'smart specialisations' industries.

The traditional sectors include maritime and refining industries, tourism, food processing, construction, and timber-furniture enterprises, while the second category includes sectors such as electronics, ICT, biotechnology, logistics and modern business services (BPO/SSC).

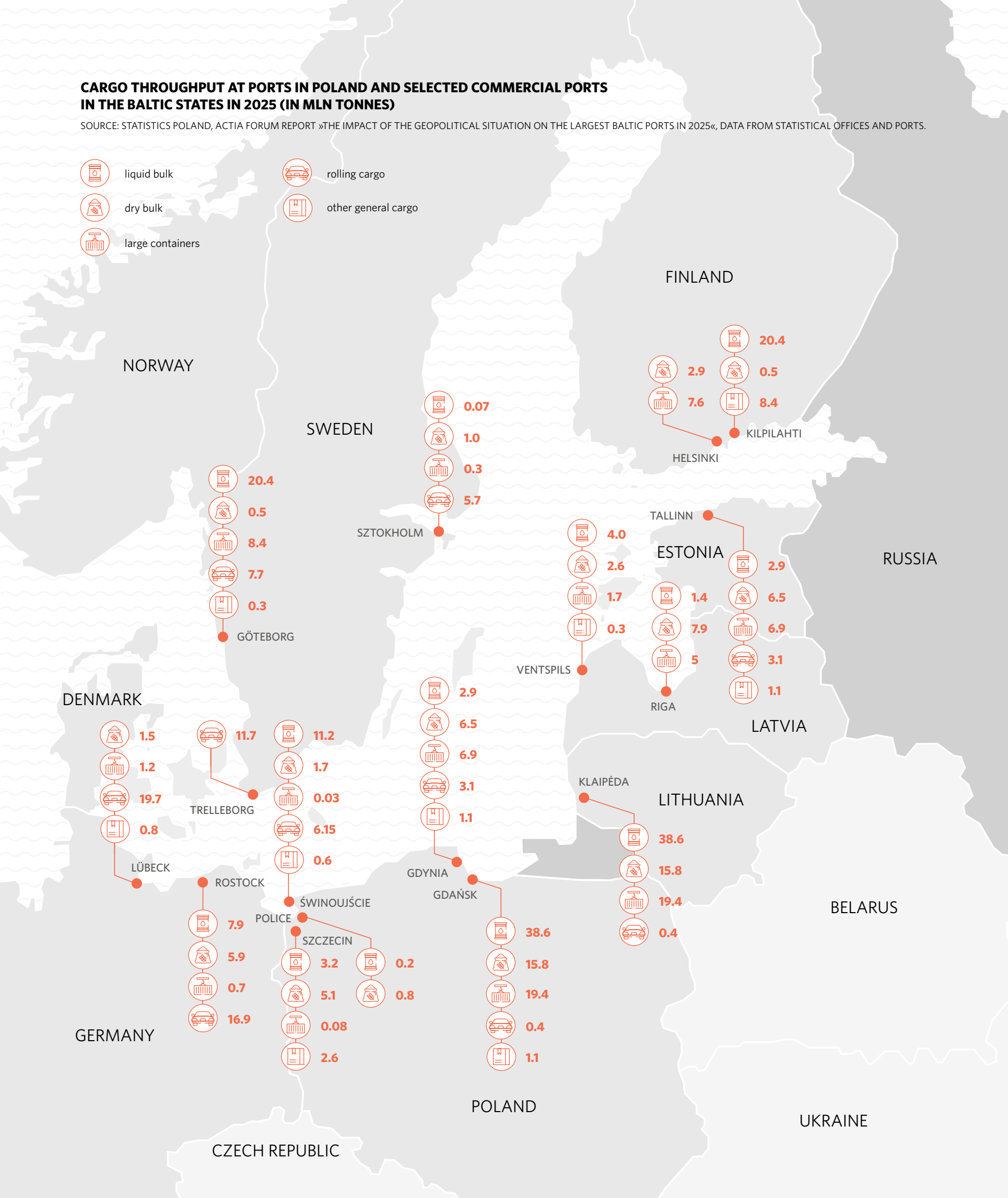
We will begin our analysis of the economic situation in the Baltic region with a brief overview, paying particular attention to those sectors that stand to benefit most from the energy transition. It should be noted, however, that the classification of traditional and future-oriented sectors adopted here is theoretical and often differs from how businesses operate in practice. In the Baltic's coastal regions, there are numerous examples of companies that successfully combine operations in mature industries with expansion into more promising areas. Shipyards are building their electrical engineering and IT capabilities, developing the production of unmanned surface and underwater vehicles. Construction companies are making inroads into the data centre sector. Ports are forming partnerships with companies in the space industry.

Given the limited scope of this report, this chapter provides an overview of the current situation in only a select few of sectors identified above – those of greatest significance to the Baltic Sea regions and most closely linked to their energy transition processes, including the development of nuclear energy. These include the maritime economy, logistics, industries related to electronics in the broadest sense, and the IT sector. **Finally, two additional sectors will be briefly characterised: although they have relatively little economic significance today, they also have considerable growth potential.** These are the space industry and data centres and artificial intelligence.

CARGO THROUGHPUT AT PORTS IN POLAND AND SELECTED COMMERCIAL PORTS IN THE BALTIC STATES IN 2025 (IN MLN TONNES)

SOURCE: STATISTICS POLAND, ACTIA FORUM REPORT »THE IMPACT OF THE GEOPOLITICAL SITUATION ON THE LARGEST BALTIC PORTS IN 2025«, DATA FROM STATISTICAL OFFICES AND PORTS.

-  liquid bulk
-  dry bulk
-  large containers
-  rolling cargo
-  other general cargo





Maritime economy

SEAPORTS

Cargo throughput is the primary indicator of a given port's capacity to participate in the international flow of goods. According to data from the Statistics Poland (GUS), in 2025, throughput increased in Poland by 3.1% year-on-year, to 128 million tonnes¹⁵. The government's 'Polish Seaports Development Programme until 2030' predicts that the number will exceed 150 million tonnes in 2030¹⁶. Given that the average annual throughput growth rate over the last 15 years has been around 5.6%, that target is certainly achievable.

The Port of Szczecin recorded the largest increase (by 10.8%) in 2025, although the Port of Gdańsk was primarily responsible for the rise of the overall national figure. Compared with 2024, it increased its throughput by 6%, and its share of national throughput stood at almost 60%. 2026 looks set to be even better for the Port of Gdańsk. In the first quarter, nearly 21 million tonnes of cargo were handled there, meaning that the volume increased by 13.6% year-on-year¹⁷.

A number of factors is driving the growing activity at seaports, including efforts to improve Poland's energy security, an increase in private consumption (up 3.7% year-on-year), and changes in the geopolitical situation, linked, for example, to shortening supply chains – a development Poland stands to benefit from. Growth in the logistics sector was a key factor enabling Polish ports to take advantage of these developments: the addition of the T3 terminal at the Baltic Hub container terminal and the rising demand for warehouses and storage facilities. **Liquid bulk cargo dominates the throughput structure at the Ports of Gdańsk and Świnoujście, which together make up around 75% of the country's total cargo throughput¹⁸.** The top throughput category included mainly crude oil and petroleum products, as well as LNG, for which 2025 was a record year thanks to the expansion of the Świnoujście LNG terminal¹⁹. In total, liquid bulk cargo accounted for 43.9% of the volume of cargo handled in Polish ports in 2025, representing an increase of almost 2% over the previous year²⁰.

In 2025, the strongest growth was recorded in the general cargo sector, i.e. small shipments from various customers, mainly containerised. Throughput in this category rose by 12%. Given that in Q1 of 2026, general cargo throughput at the Port of Gdańsk rose by 15.7%, last year's figure may be surpassed. This trend is primarily driven by the high popularity of e-commerce, including imports from China. At the same time, further growth in maritime general cargo throughput may be slowed by a new customs fee of EUR 3, introduced on July 1, which will be applied to small parcels²¹.

¹⁵ GUS, The Maritime Economy in Poland in 2025, Key Figures (GUS, 2026), 1.

¹⁶ "Programme for the development of Polish seaports up to 2030 – Ministry of Infrastructure – Gov.pl portal", Ministry of Infrastructure, accessed May 28, 2026, <https://www.gov.pl/web/infrastruktura/program-rozwoju-polskich-portow-morskich-do-2030-roku>.

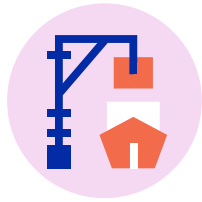
¹⁷ "Port of Gdańsk records double-digit growth in cargo handling in the first quarter of 2026", Port of Gdańsk, April 29, 2026, <https://www.portgdansk.pl/wydarzenia/port-gdansk-z-dwucyfrowym-wzrostem-przeladunkow-w-i-kwartale-2026-roku/>.

¹⁸ GUS, The maritime economy in Poland in 2025, 2.

¹⁹ Janusz Pietruszyński, "How was 2025 at the Świnoujście Terminal? Orlen releases the figures", CIRE.pl, February 11, 2026, <https://www.cire.pl/artykuly/serwis-informacyjny-cire-24/jaki-byl-rok-2025-w-terminalu-w-swinoujsciu-orklen-podaje-liczby>.

²⁰ GUS, The maritime economy in Poland in 2025, 1.

²¹ "Customs duties: Council approves customs duties on small parcels from July 1, 2026", Council of the EU, 12 December 2025, <https://www.consilium.europa.eu/pl/press/press-releases/2025/12/12/customs-council-agrees-to-levy-customs-duty-on-small-parcels-as-of-1-july-2026/>.



Shipbuilding

Key strengths of the Polish shipbuilding industry include ship design, repairs, and refits,²² as well as yacht manufacturing²³. It fares much worse when it comes to building large vessels. **The largest Polish ship repair facility is the Remontowa Shiprepair Yard in Gdańsk, owned by Remontowa Holding.** The company offers a broad range of services, and its drydocks have seen all sorts of designs, from drilling rigs to floating cranes used for installing offshore wind farms. One example of the latter is Les Alizés, a vessel owned by the Belgian company Jan de Nul, which was built in China and fitted out at ‘Remontowa’²⁴.

The holding also owns a manufacturing facility, Remontowa Shipbuilding, which went into 2026 with orders for 14 vessels²⁵. Most of these are from the Polish Navy. By 2027, the company is set to deliver a total of 14 vessels of three different classes to the military. Additionally, in recent years Remontowa has stepped up manufacturing of specialist vessels commissioned by a range of clients, including ferries for shipowners from Poland (POLSCA), Scotland (Caledonian Maritime Assets Limited), and Norway (Torghatten, Norled, Fjord1). The shipyard also builds numerous smaller, specialised vessels, including for the energy sector, including cable-laying ships, such as the Siem Amery, once ‘the most expensive vessel built in Poland’²⁶, and platform supply vessels (PSV).

Specialist vessels for the offshore sector are the trademark of Crist shipyard in Gdynia. Its portfolio includes the self-elevating heavy-lift vessel Innovation, designed for the transport and construction of offshore wind turbines, as well as hulls for offshore service vessels (OSV), ships used for offshore farm operation and maintenance, built for the Norwegian shipyard Ulstein Verft. OSV-type vessels are also built by Damen Shipyards Gdynia, part of the Dutch Damen Group. The list of production shipyards in Poland also includes the Naval Shipyard in Gdynia, mentioned in the chapter on security, as well as the Szczecin-based Wulkan Shipyard, which in October 2025, after 18 years, took on its first ‘turnkey’ shipbuilding contract²⁷.

In the past, Poland’s shipbuilding industry has been building, refitting, and repairing ships used mainly in offshore projects abroad. Now, the sector can be driven by domestic offshore wind energy projects. On September 15, 2021, shipbuilding companies signed the ‘Sectoral Agreement for the Development of Offshore Wind Energy in Poland’, signaling the signatories’ intent to benefit from efforts to increase the share of local content in the construction of offshore wind farms in the Baltic Sea (from an initial figure of around 20% to over 50% by 2040). As Andrzej Czech, a board member at Crist Offshore, pointed out in an interview with ISBnews, the share of local content can be increased not only through capital expenditure but also through operating costs, seeing as ‘The operation (...) of wind farms and offshore service bases must, by necessity, be performed by Polish personnel, from facilities located in Poland’²⁸.

22 Assumptions for the Strategy for the Development of the Shipbuilding Industry in Poland (FORUM OKRĘTOWE Employers’ Association, 2025), 3.

23 Specialized Water Craft Sector 2025 (Poland Investment and Trade Agency, 2026), <https://www.trade.gov.pl/wp-content/uploads/2026/03/Jachty-PL-2-v4.pdf>.

24 “Les Alizés in full readiness”, Remontowa Ship Repair News (Gdańsk), 2023, https://www.remontowa.com.pl/wp-content/uploads/2023/09/remontowa_news_2023_2_v6_small.pdf.

25 Mariusz Dasiewicz, “Remontowa Shipbuilding secures contract for another ferry”, Shipbuilding Portal, 23 January 2026, <https://portalstoczniovy.pl/remontowa-shipbuilding-prom-hybrydowy-torghatten-midt/>.

26 “Siem Amery – the most expensive product from Polish shipyards undergoing sea trials”, PortalMorski.pl, accessed 17 May 2026, <https://www.portalmorski.pl/stocznie-statki/31224-siem-aimery-najdrozszy-produkt-polskich-stoczni-na-probach-morskich>.

27 Jarosław Syrek, “We’re starting construction of the new Pław pond!”, Szczecińska Stocznia „Wulkan”, October 9, 2025, <https://stoczniawulkan.pl/zaczynamy-budowe-nowego-stawiacza-plaw/>.

28 Piotr Apanowicz, “Crist Offshore: „A 50 per cent local content target is achievable in the construction of offshore wind farms in the Baltic Sea – an interview”, ISBiznes.pl, 2 kwietnia 2025, <http://feed.isbnews.pl/article.xml?id=418034>.



Logistics

In a 2024 ranking by the Institute for Market Economics, the Szczecin sub-region placed first in Poland in terms of transport availability for modern industry. The Tricity sub-region came seventh. The study took into account journey times to Poland's western border, journey times to a major seaport, the number of companies in the transport and communications sector per capita, and journey times to the regional capital.

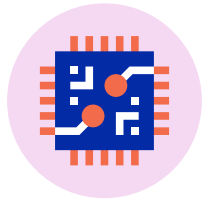
Multimodal centres, such as the Ports of Gdańsk and Gdynia with their container terminals (Baltic Hub, Gdynia Container Terminal), are a key asset for Pomerania. Meanwhile, the Port of Szczecin-Świnoujście is expanding its infrastructure through the Cape Pomerania deep-water container terminal project²⁹. To take full advantage of the ports' growing throughput capacity, investment in their rail infrastructure is also required. In November 2025, the Polish Railways and the management board of the Port of Gdańsk signed an agreement on developing access infrastructure to deep-water transshipment terminals. For the Port of Gdynia, the modernisation of Railway Line 201 is crucial, as it will improve the cargo throughput along its north-south course. A new multimodal rail transshipment hub is also being built at the Port of Szczecin – its ro-ro ramp has already been completed. Upgrades to Railway Line 273, also known as the Oder River trunk line, are even more important for the ports of Zachodniopomorskie Voivodship, as they will allow the route to run 750-metre-long trains.

Although it's the seaports that are key for the Baltic region and set it apart from the rest of the country, airports also carry economic significance. The Gdańsk Airport is the third-largest in Poland in terms of passenger traffic. It also plays an important role as a cargo hub, particularly thanks to a direct connection to Leipzig, although its cargo throughput in 2025 fell by 8.2% year-on-year. The much smaller Szczecin-Goleniów Airport is not currently a significant hub for either passenger or cargo traffic, but that may change following the ongoing reconstruction of its passenger terminal.

Access to sea- and airports, as well as good road links, are also positively affecting the Tricity's industrial and warehousing infrastructure. By the end of 2025, its total floor area stood at 1.82 million m², a 4% rise from 2024³⁰. Importantly, new developments are quickly attracting tenants – 84% of warehouse space under construction is already leased out.

²⁹ "Cape Pomerania – a new Polish deep-sea port in Świnoujście", Ministry of Infrastructure, November 11, 2025, <https://web.archive.org/web/2025111045119/https://www.gov.pl/web/infrastruktura/przyladek-pomerania--nowy-polski-port-zewnetrzny-w-swinoujsciu>.

³⁰ MARKET IN MINUTES: The Tri-City. The industrial and logistics market (Savills Research, 2026), <https://pdf.euro.savills.co.uk/poland/mim-troj-miasto-apr-2026-standard.pdf>.



Electronics

DESIGN AND MANUFACTURE OF COMPONENTS

Pomerania is Poland's heartland for contract electronics manufacturing (also known as Electronic Manufacturing Services, EMS), with a history stretching back over 30 years³¹. According to estimates by tek.info.pl, more than half of Poland's EMS production is based in the region³². EMS companies provide services to customers from the automotive, medical, consumer electronics, telecommunications, and semiconductor industries. The largest players in the region are multinational corporations, which reflects the situation at the national level: companies with Polish capital account for only around 15% of the EMS market³³. Singapore-based Flex operates a production plant in Tczew; Kwidzyn is home to factories run by US company Jabil and French firm Lacroix Electronics, while Finnish company Darekon is based out of Pruszcz Gdański, where Assel, one of the country's leading players in the EMS sector and the fifth-largest company on the Polish market in 2024 – is also headquartered.

The electronics industry in Pomerania is not limited to EMS providers, but also includes other companies within the industry's value chain. Numerous cable manufacturers have plants in the region: the Swedish firms Panlink in Tczew and AQ Wiring in Starogard Gdański, the Italian company Plati (part of the German holding company Accursia Capital) in Kwidzyn, and the Polish WH Technologies in Prabuty. The list also includes software companies (discussed in greater detail later in this report) and original equipment manufacturers. Among the latter, Radmor of Gdynia (now part of the WB Group), with a history dating back to 1947, is a standout – the firm specialises in communications gear for the military and security services, and has recently been making inroads in the space industry.

It ought to be noted that Poland's share in the European EMS market has been falling in recent years. At its peak in 2022, it stood at around 8.4%; by 2024, it had fallen to just 7.5%³⁴. Experts cite the crisis in the European automotive industry as one cause, alongside Poland's declining competitiveness, which is largely due to rising electricity prices. The fall in electricity prices resulting from the development of renewable and nuclear energy presents an opportunity for the electronics industry in Pomerania to continue building on its existing strengths.

³¹ *Focus on electronics sector in Pomerania* (Invest in Pomerania, 2022), 18, https://investinpomerania.pl/wp-content/uploads/2022/05/Focus-on-Electronics-Sector-in-Pomerania_PL-1.pdf.

³² *Report: Polish OEM/ODM Companies 2023* (tek.info.pl, 2023), 10.

³³ Łukasz Jaeske, "The Polish EMS sector is losing market share in Europe", tek.info.pl, 6 listopada 2025, https://tek.info.pl/article/4946/polska-branza_ems_traci_udzial_w_europejskim_rynku.

³⁴ Ibid.

SEMICONDUCTORS

The semiconductor and green energy industry were identified by World Bank experts in 2020 as two ‘aspiring’ sectors in Pomerania³⁵. In their view, the region has numerous advantages that could attract foreign direct investment from semiconductor companies, such as access to the expertise of electronics firms described above, which also form links in the value chain for chip manufacturing. Another key aspect is the successful investment history in the region by companies in this sector. Intel’s research and development centre in Gdańsk has been active since the company’s acquisition of the Danish firm Olicom in 1999. Over the past 25 years, it has grown to become the company’s largest R&D hub in the European Union³⁶.

But Intel is only part of the story. US companies Synopsys and Solidigm also have research and development centres in Gdańsk. The latter is owned by South Korean firm SK Hynix, which opened its own facility in the city in 2024. A year later, Spanish company Openchip launched its R&D centre in Gdańsk. That same year, Polish company Polski Krzem opened a facility in the Pomeranian capital, with the goal of creating a Polish microprocessor. Meanwhile, neighbouring Sopot has hosted the SEMI Industry Strategy Symposium Europe – the most important annual event for the semiconductor industry in Europe – over the past two years.

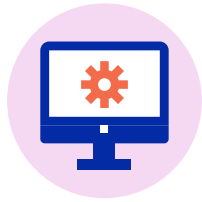
Pomerania’s ambitions, however, are much greater, and the region is consistently seeking to attract new investment, for example through regular trade missions to Taiwan. The national ‘Policy for the Semiconductor Sector 2026+’ presumes that by 2030, a new major foreign investor will open a production plant or a research-and-development centre in Poland. The former would be particularly desirable, as so-called chip ‘fabs’ are a resource currently being sought after by the world’s largest economies. What Pomerania has to offer, apart from a favourable institutional environment, human capital, and easy access to green energy, is a specific, highly suitable site: a 500-hectare plot in Wojanowo (near Pruszcz Gdański), where the Pomerania Technology and Industrial Park is to be built³⁷.

The challenge facing the region is that it is competing globally for the attention of a narrow group of players. Investments from Taiwanese or South Korean semiconductor giants are the focus of efforts by most developed economies. **Furthermore, friction between central and local government policies poses a problem.** National policy for the sector calls for the creation of a Poland–Czech Republic–Germany ‘semiconductor triangle’, which would favour the country’s southern regions, primarily Lower Silesia.

³⁵ *Impact Assessment of the Invest in Pomerania Initiative (2011–2020)* (World Bank, 2022), 40.

³⁶ Marcin Wandałowski, “The growing impact of Intel in Pomerania”, *Pomeranian Thinkletter* (Gdańsk), nr 4(15) (2023).

³⁷ Dorota Kulka, “This is a strategic project, and not just for Pomerania! A modern industrial park is to be built in Wojanów”, *Pomorskie.eu*, September 15, 2025, <https://pomorskie.eu/to-strategiczny-nie-tylko-dla-pomorza-projekt-w-wojanowie-ma-powstac-nowoczesny-park-przemyslowy/>.



IT sector

In a World Bank report, software development and IT services were identified as a ‘fully ready’ industry, which Pomerania has competitive advantages in. Prokom Software, founded in 1987, was a pioneer in the Polish software development industry; its first headquarters were located in Gdynia-Orłowo³⁸. In 2008, it merged with Asseco and has been operating under that brand ever since, while continuing to run its office in Gdynia. The history of Szczecin-based Unizeto Technologies, one of Poland’s oldest IT companies, dating back to 1965, followed a similar course. In 2015, it was acquired by Asseco, and a year later it merged with five other companies within the group to continue operating as Asseco Data Systems. The company is headquartered in Gdańsk; it also has offices in Gdynia, Koszalin, and Szczecin. The latter is also home to Asseco’s data centre and the headquarters of the group’s cloud division – Asseco Cloud. Several other Polish IT companies also have their headquarters in the region, such as Internet service provider home.pl in Szczecin.

However, the majority of the IT activity in Pomorskie and Zachodniopomorskie Voivodships is concentrated in other organisations. These are, first and foremost, the research and development centres of technology companies, such as the aforementioned Intel, which specialises in software for its own hardware. **Amazon Development Centre Poland, working in the fields of voice technology and artificial intelligence, is a key company on Pomerania’s IT map, and one with an interesting history.** Founded as Ivona Software in 2001 in Gdynia, it was acquired by Amazon in 2013 and the giant took its Ivona speech synthesiser to develop the Alexa service. Secondly, the Pomeranian IT sector also includes specialised departments within shared service centres and foreign IT outsourcing companies. The latter include Sii Poland, which has offices in Gdańsk (its second to open in the country) and Szczecin, as well as Consileon, based in Szczecin.

³⁸ Focus on electronics sector in Pomerania, 19.



Space industry

Although the Polish Space Agency is based in Gdańsk, in practice Warsaw is the hub of its operations. The Baltic regions lag behind both the capital and the south of the country in terms of the number and size of space industry firms, despite the potential offered by local universities, access to cheap energy (crucial for such an energy-intensive industry), and the concentration of technology companies. In recent years, however, there have been several developments that have drawn the attention of the space sector north.

One is the growth of the Gdynia-based startup SpaceForest, focused on rocketry – an unusual niche for Polish industry. Successive test launches of its PERUN suborbital rocket (the latest, and third overall, was performed in November 2025³⁹) were not just media events, but also demonstrated capabilities in independent payload delivery – a rarity in the domestic sector. The launches also proved the Central Air Force Training Ground in Ustka could serve as a potential spaceport that could be used by foreign companies in the future.

The other significant development for the Pomeranian space industry was the announcement in March 2026 of plans to establish a Baltic Sea Monitoring Centre in Gdańsk⁴⁰. The project aims to use space technologies, primarily satellite Earth observation, to monitor the natural environment, the security of maritime and undersea infrastructure, and to identify threats to Poland's national security. Organisations involved in the plan include the Pomerania Special Economic Zone, the Polish Space Agency, the Gdańsk University of Technology, the Pomerania Development Agency, and the Gdańsk Economic Development Agency.

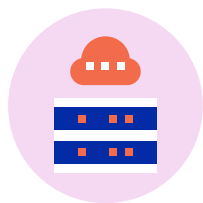
Another boost to the growth of the Pomeranian deep-tech sector, including the space industry, might be provided by the opening in Gdańsk in 2026 of two start-up incubators: the European Space Agency's Business Incubation Centre⁴¹, its third in Poland (after Rzeszów and Warsaw), and Poland's second NATO DIANA centre, unique due to its Living Lab (a space for presenting and testing solutions)⁴².

39 POLSA, "The success of SpaceForest's PERUN rocket", [polsa.gov.pl](https://polsa.gov.pl/wydarzenia/sukces-rakiety-perun-firmy-spaceforest/), November 26, 2025, <https://polsa.gov.pl/wydarzenia/sukces-rakiety-perun-firmy-spaceforest/>.

40 POLSA, "Agreement on the development of space technology and monitoring of the Baltic Sea", [polsa.gov.pl](https://polsa.gov.pl/wydarzenia/porozumienie-ws-rozwoju-technologiei-kosmicznych-i-monitorowania-baltyku/), March 20, 2026, <https://polsa.gov.pl/wydarzenia/porozumienie-ws-rozwoju-technologiei-kosmicznych-i-monitorowania-baltyku/>.

41 Robert Pietrzak, "Gdańsk in the European space innovation league", Gdańsk – the city's official website, February 9, 2026, <https://www.gdansk.pl/wiadomosci/Gdansk-w-europejskiej-lidze-innowacji-kosmicznych-Pomorska-Specjalna-Strefa-Ekonomiczna-ESA-BIC,a,304550>.

42 Gdańsk University of Technology, "NATO DIANA Living Lab launched at Gdańsk University of Technology", [pg.edu.pl](https://pg.edu.pl/aktualnosci/2026-03/na-politechnice-gdanskiej-zainaugurowano-nato-diana-living-lab), March 30, 2026, <https://pg.edu.pl/aktualnosci/2026-03/na-politechnice-gdanskiej-zainaugurowano-nato-diana-living-lab>.



AI and data centre sector

In their search for new foreign investment and economic growth drivers, the Baltic regions have in recent years turned their attention to the artificial intelligence sector and its infrastructural foundations: data centres. In Western Pomerania, the data centre market is currently in its infancy. Apart from Asseco mentioned above, only Orange Polska has a data centre in the area, and the voivodship is actively seeking new investments, which it hopes to attract through green energy availability and favourable climate conditions⁴³. The Tricity market is more developed, with four centres located there: the Pomeranian Data Processing Centre, the Play/3S Group facility, and two Artnet Group centres (in Gdynia and Gdańsk). In March 2026, news that the WBS Power Group was planning to build the Baltic Data Centre Campus, with a target capacity of 3.2 GW, caused quite a stir. This hyperscale project in Lublewo, near Choczewo, has already been issued a grid connection permit⁴⁴. Another major project with an installed capacity of approximately 200 MW, which is due to be built near Słupsk, is also awaiting official announcement – it is currently at the memorandum stage.

Efforts to develop the region's infrastructure and technology, in particular through investments in green energy, are the goal of the Pomeranian Coalition for the AI Industry and Data Centres, established in February 2025. The Baltic Institute for Energy Transition was the driving force behind its formation. The coalition's member roster includes the Gdańsk University of Technology, which the IT Centre of the Tricity Academic Computer Network is affiliated with. This centre is home to Kraken: the fourth-fastest supercomputer in Poland (after the AI factories in Kraków and Poznań, and Wrocław's Lem).

In their efforts to establish data centres and the artificial intelligence sector as a further driver of economic growth, the Baltic regions may tap the same advantages they are looking to capitalise on when seeking semiconductor industry investment. That includes extensive technological expertise of local businesses, the long history of industry leaders operating in the region, logistical infrastructure, and green energy availability. The challenges are also similar: competition for investment at both global and national levels, and with Polish regions in the south.

43 Małgorzata Piskórz et al., *Assessment of the investment potential for data centres in Western Pomerania* (Szczecin, 2025), <https://innowacje.wzp.pl/wp-content/uploads/2026/01/Raport-koncowy-Ocena-potencjalu-inwestycyjnego-dla-centrow-danych-na-Pomorz-Zachodnim.pdf>.

44 Kacper Świsłowski, »Baltic Data Centre Campus: A hyperscale data centre to be built in Pomerania«, wnp.pl, accessed March 16, 2026, <https://www.wnp.pl/energia/milardy-dolarow-na-data-center-w-chozewie-powstanie-tam-hiperskalowy-gigant,1042696.html>.



The Baltic mark of excellence

In this report, we identify a number of processes that contribute to the growing political and economic role of northern Poland. A number of strategically important investments on the coast are shifting Poland's economic centre of gravity north.

With the expansion of critical infrastructure, as well as the potential threat from Russia, the Baltic Sea is taking on an increasingly important role in Polish security policy. At the same time, Poland is strengthening its regional and European alliances in the face of uncertain US policy, which is driving closer cooperation with the Baltic states, which share Warsaw's perspective on security issues.

These circumstances naturally lend themselves to the strengthening of relations with the Nordic countries. Recently, there have been clear signs of these ties growing deeper – Polish investments in offshore wind farms are being developed with Danish companies Ørsted and Vestas, among others. Closer ties with the Nordic countries are also evident in the field of security. One example is Poland's selection of a Swedish partner to supply submarines under the Orka programme, which suggests deeper political, military, and technological relations between the two countries; earlier, in 2024, Poland and Sweden signed a strategic partnership agreement. One example of successful Polish-Finnish cooperation can be found in ICEYE – a company seen as one of Poland's most important technology players and a global leader in the production of small Earth observation synthetic aperture radar satellites. Although it is formally a Finnish company, its co-founder and CEO Rafał Modrzewski is a Pole. In May last year, the Polish Ministry of Defence signed a contract with ICEYE worth approximately PLN 860 million for the supply of a satellite-based Earth observation system. Furthermore, Poland has also been increasingly involved in regional affairs, holding the presidency of the Council of the Baltic Sea States from July 1, 2025, to June 30, 2026.

Poland's shift north is inexorably linked to narrative issues: how should we frame this process?

What does it mean to us? The growing proximity to the Nordic countries also prompts the question of the extent to which Poland can benefit, both strategically and in terms of its image, from a deliberate and stronger orientation toward the north. To answer all these questions, we consider the following issues:

- Why are the Nordic countries an attractive point of reference?
- What reputation capital does Poland possess?
- How could Poland benefit in terms of its public image from closer ties with the Nordic countries?
- How can a credible Baltic-Nordic narrative be constructed?

Nordic countries are the benchmark for institutional standards and reputation

For the purposes of this chapter, the Nordic countries are defined as the Baltic states of Denmark, Finland, and Sweden. The region boasts one of the strongest global reputations in the world. The three countries rank consistently high in terms of quality of life, rule of law, innovation and soft power. They are associated with stability, high levels of public trust, low levels of corruption, and high-quality public institutions. **The reputational capital of the Nordic countries does not, therefore, stem solely from favourable public perception: it is underpinned, first and foremost, by actual indicators of societal development.** As a result, they are attractive partners for political and economic actors.

The Nordic countries perform exceptionally well in studies of living standards. In the 2026 World Happiness Report, which examines residents' subjective assessment of their well-being, Finland ranks first for the ninth year running; Denmark comes in third place, Sweden in fifth, and Poland in 24th. The 2025 Human Development Index, published by the United Nations Development Programme, confirms that the aforementioned countries are also among the most developed in the world: Denmark is in fourth place, Sweden in fifth, and Finland in seventh; Poland trails behind in 35th place.

In the World Justice Project's 2025 Rule of Law Index, they are cited as a global benchmark for the rule of law and quality of institutions: Denmark, Finland, and Sweden are ranked between first and fourth. Poland is ranked 32nd, and 24th out of 31 countries in the EU/EFTA/North America group. In Transparency International's 2025 Corruption Perceptions Index, which assesses perceptions of corruption in 182 countries on a scale from 100 to 0, Denmark (score of 89) and Finland (score of 88) occupy the top two places, whilst Sweden comes sixth with a score of 80; Poland ranks 52nd with a score of 53 points.

The Nordic countries also perform very well in economic rankings. In the 2025 Global Innovation Index, which examines the innovation ecosystem across 139 economies, Sweden ranks second, Finland seventh and Denmark ninth; Poland is in 39th place. In the Heritage Foundation's Index of Economic Freedom, Denmark ranks seventh, Sweden 11th, Finland 13th, and Poland 40th out of 176 economies. In the 2025 IMD World Competitiveness Ranking, which assesses 69 global economies, Denmark ranks fourth, Sweden eighth, Finland 14th, and Poland 52nd.

In rankings measuring reputation and global influence, the aforementioned countries perform well, but slightly less so than in those measuring development indicators. This is linked to the size of these countries and their relatively lesser cultural influence. In the 2026 Global Soft Power Index, which assesses the soft power of 193 countries, Sweden ranks 13th, Denmark 18th, Finland 23rd, and Poland 31st. In the 2025 Anholt Nation Brands Index, which examines the international reputation of 50 nations, Sweden ranks ninth, Finland 17th, and Poland 28th (Denmark is not included in the survey).

Poland has a reputation as a country of growth and security

In these rankings, Poland occupies positions significantly lower than the Nordic countries, in line with the country's level of development. In recent years, however, Poland has seen its image as a country of economic success, with a growing role in the field of European security, clearly strengthen. This change is primarily driven by the dynamic growth in GDP since 1989. The World Bank notes that the country has

experienced extraordinary economic success since the 1990s, and that its economy is characterised by resilience to crises; the OECD 'Economic Surveys: Poland 2025' report points out that Poland's per capita GDP has doubled since 2005⁴⁵. The second factor bolstering Poland's image is its high defence spending, which will reach almost 5% of GDP in 2026. Following Russia's invasion of Ukraine in 2022, Poland's importance as a NATO frontline state and a key hub for Ukraine support has also strengthened.

In 2025, Poland moved closer to joining the ranks of the world's twenty largest economies, exceeding the USD 1 trillion mark for annual GDP; in 2026, at the invitation of the US, Poland took part in the work of the G20, while Washington expressed its support for the country's efforts to join the group. **According to an International Monetary Fund forecast, in 2026 Poland will overtake Spain and Japan in terms of GDP per capita at purchasing power parity (PPP), that is per capita taking into account the cost of living.**

Poland's success story has been noted by European politicians and the mainstream media. As recently as 2023, Keir Starmer's Labour Party warned that, if current trends continued, Poland could overtake the UK in terms of GDP per capita at purchasing power parity by 2030; the British media were quick to pick up on this story. In 2024, the French newspaper *Le Monde* described Poland's 20 years of EU membership as a spectacular success⁴⁶. In 2025, the weekly magazine *The Economist* featured Poland on its cover, portraying it as a rising economic and military power⁴⁷. Similar stories have appeared in a number of other media outlets.

This success story is reflected to some extent in the rankings. Poland has been steadily climbing in the World Happiness Report: a decade ago it was ranked 46th; in 2022 it broke into the top 40 for the first time; and in the 2026 edition it was ranked 24th. In the Global Soft Power Index, Poland rose from 40th place in 2022 to 31st place in 2025, while in the Anholt Nation Brands Index it has remained between 26th to 28th place for over a decade. **The country's growing appeal is further indicated by the fact that since 2016 Poland has been a permanent net immigration country, meaning that more people are moving into the country than leaving – an unprecedented shift in the country's modern history.**

Poland can bolster its brand by aligning itself with northern standards

Polish authorities and leaders have recently been speaking favourably about the possibility of forging closer relations with the Nordic countries. In 2026, at a security conference in Oslo, Foreign Minister Radosław Sikorski said that in Poland today 'we like to think of ourselves as southern Scandinavia'. Also in 2026, during a visit to Warsaw by King Carl XVI Gustaf of Sweden, Finance Minister Andrzej Domański said that Poland had made a strategic shift towards the north. Meanwhile, President Karol Nawrocki, a representative of the current opposition in Poland, put forward a proposal to include Sweden and Finland in the Bucharest Nine, an informal grouping of countries on NATO's eastern flank.

45 OECD (2025), *OECD Economic Surveys: Poland 2025*, OECD Publishing, Paris, <https://doi.org/10.1787/483d3bb9-en>.

46 E. Albert, H. Bienveny, Poland's great economic catch-up, 20 years after accession to the European Union, https://www.lemonde.fr/en/economy/article/2024/05/21/poland-s-great-economic-catch-up-20-years-after-accession-to-the-european-union_6672198_19.html

47 How Poland can keep its place at the heart of Europe, <https://www.economist.com/leaders/2025/05/22/how-poland-can-keep-its-place-at-the-heart-of-europe>

There are at least three ways of looking at the benefits of Poland's turn north. First, from a foreign perspective: **close relations with the Nordic countries could improve Poland's image by associating the country with highly developed partners.** This would reinforce the perception of Poland as a mature and stable democracy committed to consistent growth. Such an image would require concrete evidence of this rapprochement: joint political and economic projects, and Poland's continued convergence with the Nordic countries in terms of development standards.

Second, from a national perspective: the new vision of Poland's growing proximity to the Baltic Sea could serve as a vehicle for national development aspirations aimed at adopting Nordic standards. **Poland has not yet closed the gap with Nordic countries in terms of quality of life, the quality of its institutions or the sophistication of its economy. At the same time, it is significantly larger than the Nordic states and has growing ambitions;** greater integration of the Nordic-Baltic region could be one expression of this ambition, with obvious benefits for Poland.

Third, from the perspective of the Polish coast: Poland's northern regions can provide a tangible foundation for the 'northern narrative' – fostering an image of a country that is more maritime oriented, environmentally minded, and economically and technologically advanced. **In this context, through Pomerania, Poland becomes a security provider in the Baltic Sea; Pomerania's ports and logistics become a crucial gateway for maritime trade with Central Europe;** and the Tricity, Szczecin, Świnoujście, Koszalin, and Słupsk serve as a natural laboratory for change and can become engines for projects aimed at improving residents' quality of life. These changes in Pomerania would mark the next stage of Poland's modernisation, more deeply rooted in the Baltic region than before, yet with an outlook that extends beyond the north, given that Poland also has interests in the west, south, and east.

Conclusions: the Baltic mark of excellence



Poland's reputation stands to benefit from a shift in the economic and political centre of gravity towards the north. The Nordic countries are viewed very favourably around the world, and forging closer ties with them could serve Poland's interests and enhance its reputation. Cooperation with the Nordic countries is not a source of political conflict in Poland, which makes it possible to build stable and long-term international relations in the region.



Poland has its own growing brand capital, thanks in part to its rapid economic development since 1989. This is why it has no need to copy other models, abandon its own historical identity or, in a sense, pretend to be part of Scandinavia. The strength and resilience of its economy, along with strong social aspirations for development, are assets the country should draw on. Poland and the Nordic countries have significantly different political and social contexts, and it would be a mistake to ignore that. In this sense, describing Poland as 'southern Scandinavia' may be useful as rhetorical shorthand, but it should not serve as the definitive formula for positioning Poland.



Poland can adjust its international standing by complementing its image as a country in Central and Eastern Europe, or Central Europe, with the perception of a state serving as the southern pillar of the Baltic-Nordic region. In this way, Poland's own and Central European identity, as well as awareness of Poland's interests in the east, would be strengthened by deeper relations with the north. Poland can demonstrate that its turn north is not a coincidence, but rather a natural consequence of domestic changes in the areas of security, energy, and the economy, as well as growing social aspirations.



In this interpretation, Poland is not a Nordic country; however, following decades of dynamic growth, it is beginning to expand its geopolitical influence while, at the same time, pursuing Nordic quality standards. This approach allows Poland to maintain its own distinct identity and to strengthen its positive image through its close alignment with Nordic development standards. Shared aspirations include population and supply chain security, economic and social resilience, quality of public institutions, products, and services, as well as quality of life. This framework could be tentatively described as the 'Baltic mark of excellence'.



Strengthening Poland's image as a northern country cannot be reduced to an appealing slogan or a promotional campaign – a sort of 'Nordic-washing' – but must be underpinned by real indicators. It will be easier for Poland to shift its image from being a part of Central and Eastern Europe towards being a part of Northern Europe if it engages more frequently and more prominently with Northern European forums. It is also crucial to bring the country closer to Nordic standards, particularly in terms of the quality and stability of public institutions, where Poland currently faces its greatest systemic challenges.



Poland's current positive reputation is based on its standing as a European leader in growth – a country which, through immense effort, has closed the gap with the West in a short space of time. This capital can only be maintained and multiplied through sustained success, that is continued growth. Further successes in this area would mark Poland as a country no longer catching up economically and developmentally, but one capable of consistently producing high-quality institutions, goods, services, solutions, and ideas – a Nordic-Baltic country not by virtue of its geographical location, but owing to its position as key contributor to the region's political, economic, and security architecture, as well as the regional benchmark for high quality of life for its citizens.

Opportunities

Stronger strategic importance of the region to Poland's interests and its energy security. In the wake of a lasting shift in the country's energy geography, the heart of new generation capacity development is moving from the south to the north of Poland. It is in Pomerania that strategic investments related to the generation of green and low-carbon energy – in particular offshore wind power and nuclear energy – are and will be concentrated. Pomerania is also a key hub for the import of fuel and gas; in the latter case, this is of particular significance given the growing role of gas resources in the energy transition and the need to diversify their supply. The region is also becoming a source of cross-sectoral integration – bringing together the energy sector, ports, logistics, industry, power grids, the digital sector, and new technologies.

Development of public infrastructure and infrastructure supporting energy projects. Energy projects, and the associated development of new roads, railway lines, and transmission networks, will improve transport accessibility in the Baltic region and ensure a reliable energy supply. They will also drive the development of local infrastructure – access roads, housing, educational and public facilities, and healthcare and emergency services – which may lead to lasting improvements in the quality of life in some coastal municipalities.

Improved prospects for further development of industrial infrastructure in the region. Strategic investments in northern Poland may provide the momentum needed to rebuild manufacturing capacity in the Baltic region – primarily in the shipbuilding, port, and metalworking and engineering industries. Investments in nuclear power, offshore, power grids, and fuel logistics will drive demand for steel structures, cabling, automation, maintenance services, and assembly facilities, thereby strengthening Pomerania's share in European supply chains.

Accelerating the development of local business – in both the manufacturing and service industries. Energy investments can increase demand for construction, logistics, maintenance, hospitality, and consulting services, and stimulate the growth of firms supporting large-scale infrastructure projects. Of particular significance is the long-term timeframe of the nuclear power plant project – construction, spread over a dozen or so years, will generate sustained demand for labour, services, and support facilities. This will translate into higher local tax revenues, the development of business tourism and the hospitality sector (with year-round rather than seasonal demand), and a strengthening of the region's image as an attractive destination for investors.

A strong presence in value chains of future-oriented industries. The region is home to companies involved in the manufacturing of semiconductors, electric vehicles, green energy sources, and artificial intelligence systems. Their areas of expertise complement one another, which means that in many cases they are able to source local subcontractors, shortening logistics chains. The prospect for Pomerania – as for the whole of Poland – is to pursue moving up the value chain.

Evolution of the business services sector. Although Poland is losing its competitive advantage in terms of low labour costs in the BPO/SSC sector to countries such as India and the Philippines, this does not mean that these industries are in crisis. The Pomeranian regions, as one of the main hubs for

modern business services, are already transitioning towards higher value-added services, requiring strong IT skills, for example. If they keep pace with this trend, they may attract more demanding clients, including from the energy sector, where cybersecurity and artificial intelligence are playing an increasingly significant role.

Development of military and civilian maritime capabilities. Poland's growing dependence on the Baltic Sea and the need to secure, protect, and defend it will prompt the country to invest in military and civilian capabilities enabling it to monitor the situation at sea and carry out police or military interventions in the event of a crisis or escalation. The technologies and production and maintenance facilities required for this purpose will strengthen the maritime and defence industries, as well as their related sectors.

Formation of a Baltic coalition of like-minded states. The need to protect and defend the Baltic Sea against Russian aggression will unite countries for which regional security is an indispensable prerequisite for development and stability. The proximity of the threat and their shared interests will strengthen their determination to invest in defence capabilities and to deepen cooperation in the region. Such a coalition will serve as a regional pillar of NATO and a testing ground for defence integration within the European Union.

A more prominent role for Poland in the Baltic region than in other international frameworks. Poland's economic and defence potential, its geographical location, and its political determination to make the security of the Baltic Sea region the cornerstone of its long-term strategy give Warsaw a leading role in the agreements, processes, and transformations aimed at building a regional Baltic coalition. With the exception of Germany, Poland has no rivals among its Baltic neighbours in terms of demographic and economic standing, and for many smaller partners it is more a provider of security than its consumer, which strengthens its political position.

Northern regions will benefit from nearshoring and Poland's Nordic-Baltic turn. The country's northern regions are at the heart of these geopolitical processes. Their advantage lies in a long history of business relations with the countries of the Baltic Sea basin, with foreign companies from that region often choosing the Tricity or Szczecin as the location for their first branches in Poland. Stronger local cooperation between these countries and Poland may, for example, open up the Scandinavian markets, traditionally seen as rather closed, to Polish companies. At the same time, Poland can act as a gateway to the Nordic and Baltic regions for companies from more distant parts of the world, helping them to shorten their logistics chains.

Maintaining a US presence in Europe via the Baltic region. The Baltic region countries are investing in defence at the level required by the US, taking on increasing responsibility for their own security, and are simultaneously supporting efforts to maintain a US military presence in the area. In the face of Donald Trump's policy of reducing US military engagement in NATO, the Baltic region is seeking to create a favourable climate for potential redeployments, rather than a withdrawal of US forces from the continent. While the impact of these measures on Washington's decisions should not be overestimated, the determination to make use of every incentive is strongest in the region.

Challenges

Increased pressure on local infrastructure and public services. The influx of workers involved in the construction of strategic projects, and subsequently in the operation of the completed facilities, will increase demand for housing, transport, municipal infrastructure, education, and healthcare. Some of these needs are already being met using public funds – including through a PLN 250 million programme to support local government projects in Pomorskie Voivodship⁴⁸. Warsaw has also allocated PLN 4.7 billion to a multi-year programme covering the development of infrastructure supporting strategic energy investments, including the construction of the country's first nuclear power plant⁴⁹. The primary investor in the plant project is also involved in supporting local infrastructure – PEJ enters into agreements with local governments and road operators to upgrade, repair, and maintain roads used in connection with the project⁵⁰. In each case, however, the scale and pace of investment, as well as the ability of local authorities to prepare, coordinate, and implement projects on time to meet the rapidly growing needs of residents and workers, will remain a challenge.

Public opposition and land-use conflicts. Large-scale energy projects may result in increased traffic, noise, pressure on local roads, and temporary restrictions on the use of certain areas. Social tensions may intensify, particularly in the event of delays – including those brought on by factors beyond the investors' control – as these extend the adverse impact of the project on local communities. Land- or sea-use conflicts with the needs of fisheries, tourism, environmental protection or the armed forces will remain an additional challenge.

Insufficient participation of domestic companies in supply chains. The scale of the economic benefits brought by investment projects in the Baltic Sea will depend on the ability of Polish companies to meet quality requirements, secure contracts, and remain cost-competitive. Otherwise, a significant proportion of the added value from offshore operations, nuclear energy, power grid development, and port infrastructure may go to foreign suppliers, and the region will remain primarily a location for investment projects rather than a sustainable industrial base for the sector.

Limited use of surplus energy from renewable sources. Insufficient development of energy storage, flexible demand, and hydrogen technologies may hinder the further growth of onshore and offshore wind power and photovoltaics. For example, under current regulations, the technical potential for wind power in Zachodniopomorskie Voivodship stands at 16-27 GW, compared with the current 2.6 GW. However, realising this potential will require an increase in local energy consumption, including daily and seasonal storage, as well as the development of green hydrogen production and its derivatives, such as ammonia and methanol.

48 Pomorskie Voivodship Office in Gdańsk, Programme to support local authority investment in connection with the implementation of key strategic energy infrastructure projects in the Pomeranian voivodeship, [Internet:] <https://www.gov.pl/web/uw-pomorski/program-wspierania-inwestycji-jednostek-samorządu-terytorialnego-w-związku-z-realizacją-kluczowych-inwestycji-w-zakresie-strategicznej-infrastruktury-energetycznej-w-województwie-pomorskim>.

49 Resolution No. 103 of the Council of Ministers of June 20, 2023, on the establishment of a multi-annual programme entitled "Programme to support infrastructure investments in connection with the implementation of key strategic energy infrastructure projects, including a nuclear power station, in the Pomeranian Voivodeship" (M.P. 2023 poz. 697).

50 Polskie Elektrownie Jądrowe: Joint efforts for safety. Polskie Elektrownie Jądrowe and Wejherowo County have signed a memorandum of understanding, [Internet:] <https://pej.pl/dla-mediow/aktualnosc/wspolne-dzialania-dla-bezpieczenstwa-polskie-elektrownie-jadowe-i-powiat-wejherowski-podpisaly-porozumienie-drogowe/>.

Russian attacks on coastal infrastructure. Russia's capabilities in the Baltic Sea are significant and could be used for hostile hybrid operations in the event of an escalation during a crisis or in the initial phase of a potential war. The industrial facilities, military bases, and energy infrastructure currently being developed along the coast could then become targets for missile, drone, and air and submarine strikes – the greater their importance to the functioning of the state and the armed forces, the more likely they are to be targeted. Therefore, the defence of critical infrastructure must be developed in tandem with its construction.

Trade-offs between naval capabilities and other military requirements. The navy is one of the most cost-intensive branches of the armed forces in terms of combat platforms, weapons, training, and maintenance. Submarines are particularly expensive; the same applies to helicopters and aircraft intended for naval operations. Consequently, in countries focused on land warfare (such as Poland), investment in naval assets is often given lower priority than other areas, despite the strategic importance of the naval forces.

Alienation of some partners due to capability imbalances. Concerns about the regional dominance of large countries (Germany, Poland) over medium-sized (Sweden, Denmark, and Finland) and small (Estonia, Latvia, and Lithuania) neighbors and partners may lead to reluctance to enter into arrangements that produce clear economic or military leaders. External actors, such as Russia and China, as well as allies who feel threatened by the region becoming too independent, may also be disinclined to see a cohesive Baltic coalition formed. To prevent this, they may use their influence and means of exerting pressure.

Technical, administrative, and legal obstacles to cooperation between countries. The exchange of intelligence or technological secrets, even between allies, does not always proceed smoothly – and the integration of situational awareness around the Baltic Sea would require real-time data flow. The creation of regional industrial platforms and military interoperability may require decisions that infringe upon individual economic interests or reshape the legal order.

Rising global competition for investment from technology companies. In their strategic plans, the Baltic regions prioritise the development of sectors that are globally regarded as key drivers of economic growth, such as semiconductors and data centres. Focusing on attracting investment from the biggest players in these sectors may pay off economically and in terms of reputation, but it also entails opportunity costs. Furthermore, although capital expenditure by companies in these sectors is growing rapidly, market volatility often leads firms to suspend or cancel projects in less significant markets – a category which usually includes Poland – as exemplified by the scrapping of Intel's investment in Miękinia near Wrocław.

Inadequate pace of expansion and modernisation of power grids. Transmission networks should be one of the main priorities for investment in the state's energy policy. This requires the simplification of investment procedures, increased expenditures, and better coordination between Poland's state grid operator PSE, DSOs, and investors, particularly in light of the growing demand for energy resulting from new investments, the influx of workers, and the development of housing, service, and municipal infrastructure.

Stagnation in domestic supply chains. The state should consistently support the development of industrial infrastructure for the nuclear energy sector, the offshore sector, and power grids. The development of industrial expertise, certification systems, and mechanisms to increase the participation of Polish companies in ongoing investment projects will be crucial.

Recommendations

1

Ensuring regulatory stability. Maintaining the pace of investment requires predictable government policy towards the energy sector, industry, and critical infrastructure. This applies in particular to the regulations governing support schemes, grid connections, investment locations, and local content requirements, as well as the long-term framework for nuclear power, gas, offshore energy, and renewable energy sources.

2

Linking energy investments with the development of local infrastructure. Major energy projects should be accompanied by coordinated measures relating to the construction and expansion of local roads, housing, educational facilities, healthcare infrastructure, and public facilities. This requires ongoing cooperation between investors, central government, and local authorities, as well as mechanisms for financing accompanying investments.

3

Development of technologies for utilising surplus energy from renewable sources. Further growth in renewable capacity in Pomerania requires support for energy storage, flexible demand, and hydrogen technologies. Without these components, the full potential of onshore and offshore wind power and photovoltaics will remain underutilised at the very least, and some consumers and installations will be deprived of the opportunity to provide flexible demand services to the electricity system.

4

Investment in human capital. The Baltic regions must ensure that the skills of their workforce are continuously improved. These skills must keep pace with changing labour market demands resulting from shifts in value chains, the energy transition, and the growing importance of the security sector. This may involve increasing public spending on education in selected fields (such as engineering or computer science), but also strengthening cooperation between business and academia, and supporting lifelong learning, for example through upskilling programmes (aimed at improving and broadening skills) or reskilling programmes (helping employees retrain).

5

Ensuring a just transition. The rapid changes currently taking place in the Baltic Sea regions may give rise to social tensions, particularly in the context of the difficult transformation periods after 1945 and 1989. Demographic changes linked to the influx of new workers, infrastructure investments affecting the region, and labour market shifts resulting from the declining importance of certain sectors and the prioritisation of others will pose particular risks. The local third sector could be an important ally for authorities and businesses in alleviating these concerns.

6

Strengthening the protection of critical infrastructure. As energy infrastructure becomes increasingly concentrated in the Baltic region, it will be necessary to enhance the resilience of energy, port, and digital systems against hybrid, cyber, and physical threats. This should include better coordination between operators, public authorities, and the security services.

7

Establishment of a Baltic Dome by countries of the Baltic Sea region. This would involve deeper strategic cooperation and, ultimately, a joint system for the surveillance, protection, and defence of the Baltic region as the eastern flank of NATO and the European Union. It would integrate the civilian, military, technological, and industrial resources of the Baltic states, creating a bulwark against Russian aggression and a platform for the development and export of the Baltic security model.

8

Signing of the Baltic Charter by countries of the Baltic Sea region. This would be a compendium collecting best practices in the areas of building resilience and public awareness in the face of military and hybrid threats, civil defence, and security education, and fostering scientific, business, and cultural exchange related to the specific characteristics of the Baltic region. As a complement to hard-power tools, it could serve as a soft-power platform to promote the values, ambitions, role, and achievements of the Baltic Sea region.

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