



Summary of the Report

In the face of changes in global energy markets, modifications to energy resources' transport routes, and geopolitical tensions (including Russia's military aggression against Ukraine) Poland continues to face **the challenge of ensuring its energy security**. The report „Will the Sea Help? The Baltic Sea and Poland's Energy Security” highlights the growing **importance of the Baltic Sea in achieving Poland's energy policy objectives**. The authors discuss the opportunities and challenges associated with the development of energy infrastructure on the Baltic and along the Polish coast (including offshore wind farms, import terminals, and nuclear power plant) and seek answers to the question of whether **the concentration of generation capacity and import infrastructure in the North of the country enhances Poland's energy security**.

- Thanks to broad access to the Baltic Sea, **Poland holds a privileged position** compared to other Central and Eastern European countries.
- Ensuring **freedom of navigation in the Baltic** is essential for trade as well as energy security of Poland and the region.
- **Ports become guarantors** of access to the wealth of the global market, energy carriers, components, and raw materials.
- Ports in Gdańsk, Gdynia, Szczecin, and Świnoujście contribute **up to PLN 58 billion** to Poland's budget – almost as much as all legally employed workers in the country.
- Following Russia's full-scale aggression against Ukraine, the energy infrastructure that has been developed over the years on the Baltic and along the coast, along with the strategic interests of the state pursued by state-owned companies, have **enabled the diversification of energy and raw material supplies to Poland**.
- **Poland's energy dependence on the Baltic**, understood as the ratio of imports of major energy resources and carriers to their total consumption in the country, currently **stands at 48%, and could rise to 61% by 2040**.
- Existing Polish policy documents emphasize the importance of building individual energy installations at sea or on the Polish coast for generating the necessary electricity and diversifying supply routes, but **lack a broader, updated strategic vision**.
- Although energy investments in the Baltic create national independence, their **location in the marine environment creates specific vulnerabilities to threats**.
- Referring to the Baltic Sea as a “NATO lake” may lead to **the mistaken belief in full control** of the strategic situation and widespread dominance of the Alliance over the Russian Federation, especially in the context of conventional naval forces.
- The Baltic still plays a significant role in **Russian policy, which actively seeks asymmetric and hybrid means** to compensate for its unfavorable strategic situation.
- It is fundamentally important to **ensure the protection of strategic energy infrastructure** located in the Baltic region and to **expand the navy** capable of controlling key geographical areas.
- Ensuring multi-level security and increasing resilience of the north of the country within the **economic dimension of Poland's foreign policy** becomes crucial.
- It is in the interest of Poland and the countries of the region to build such political relations and develop energy infrastructure that, in a crisis situation in the Baltic Sea basin, will enable the **continuity of supplies based on alternative routes**.