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## **The Tenth Three Seas Initiative Summit in Warsaw: Key Decisions and Prospects for Development**

The tenth anniversary summit of the Three Seas Initiative (3SI), hosted by President Andrzej Duda and traditionally coupled with a Business Forum, was held in Warsaw on 28-29 April 2025. The event was attended by representatives of 23 countries and entities. The primary accomplishments of the summit include the incorporation of new strategic partners, Spain and Turkey, along with new associated participating states, Albania and Montenegro. The primary theme of the meeting pertained to security in its broadest sense. Notably, this marked an unprecedented occurrence in the annals of the format, wherein the final declaration did not garner the unanimous endorsement from all member states. The summit served to underscore the enduring appeal of the format itself and the Central and Eastern European (CEE) region in general. However, it also exposed the inherent structural and functional challenges confronting the Initiative.

**Political decisions.** At the Warsaw Summit, the expansion of the Three Seas Initiative's cooperation to incorporate new strategic partners and associated participating states was a matter of notable significance (see Appendix). This is an unambiguous indication that the Initiative and the CEE region continue to be regarded as attractive prospects, primarily due to their economic potential, demographics, development dynamics, geopolitical significance in the context of shifts in the international security structure and EU membership. The ongoing high interest in the CEE region was exemplified by the decision announced at this year's 3SI summit by Japanese Prime Minister Shigeru Ishiba to establish the headquarters of the Japan Bank for International Cooperation in Warsaw.

However, it should be noted that not all participating countries and partners were represented at the highest diplomatic level (see Annex for examples, including Austria and Germany). This is indicative of a lack of willingness on their part to become more involved, to continue cooperation or to support the Initiative. The necessity to preserve uniformity in respect of the continuing political commitment of participating nations and their involvement in particular infrastructure schemes has constituted a pivotal responsibility of the initial ten years of the 3SI, and any diminution of this in the political agendas of individual nations may bear adverse consequences for the Initiative itself.

In a renewed expression of support for Ukraine, the participants of the 3SI Summit reiterated their stance in favour of the country. The final declaration issued a condemnation of the Russian aggression against Ukraine, as well as any form of support for the aggressor by third countries. It was asserted that there was support for the sovereignty and territorial integrity of Ukraine within internationally recognised borders. The signatories of the declaration advocated increased pressure on Russia 'to weaken its ability to continue to wage aggressive war'. The statement asserted that individuals accused of war crimes 'must be held criminally responsible'. The document also highlighted the potential role that the 3SI could play in the process of rebuilding Ukraine in the aftermath of the war. The Three Seas Initiative countries have declared their support for the EU's accession process with Ukraine, Moldova and the Western Balkan countries. This support has been expressed through the commitment to open all negotiation clusters as soon as possible, and to allocate the necessary instruments and financial resources to ensure their speedy closure. It is important to note that twelve Priority 3SI projects involving Ukraine are currently underway, including the renovation of the Mukachevo-Wielkie Kapusznany transmission line and the construction of the Brody-Adamovo oil pipeline.

**Hungary's position.** The Hungarian government chose not to endorse the joint declaration in its complete form. This occurrence marks a historic first in the series of 3SI summits. In a separate statement, Hungary expressed its rejection of the provisions outlined in paragraphs 4-9 of the declaration, citing concerns that 'some of the wording of these paragraphs goes beyond the new geopolitical circumstances'. The aforementioned new geopolitical circumstances were defined by the ongoing peace negotiations between the US, Russia and Ukraine. According to the Hungarian position, these negotiations were intended to 'bring the Russian-Ukrainian conflict into a new phase'. The passages from which Hungary broke out concerned the condemnation of Russia's aggression against Ukraine, the declaration of continued aid to Ukraine and support for the aspirations of EU candidate states. The issue of support for the enlargement policy was further clarified by Hungary in their position statement. The document expressed unequivocal support for the enlargement of the EU to include the Western Balkan states, while suggesting that other directions of enlargement are geopolitically motivated and not, as previously stated, 'merit-based'. It is evident that Hungary's representatives have utilised this argument for an extended period, predominantly in the context of Ukraine (though de facto it also relates to Moldova). However, this constitutes the preliminary occasion on which they have incorporated it into an official stance. However, it should be noted that this was done in a discreet manner, without directly naming any specific country.

The decision to issue a separate position does not necessarily indicate a lack of support for the 3SI itself by Hungary; however, it is another factor that has a negative effect on its coherence. Furthermore, the position adopted by Hungary in both the 3SI and, prior to that, within the EU – when it was expected to exercise its veto over the extension of sanctions and from which it was allegedly dissuaded by the US – unmistakably signifies that the government led by Viktor Orbán is emboldened to act by the attitude of Donald Trump's administration. However, should the 'peace talks' surrounding the Ukraine war prove unsuccessful, as indicated by their state at the time of the 3SI summit in Warsaw, or should it become evident that the United States will not be withdrawing its aid to Ukraine, it would suggest that the environment surrounding V. Orbán does not, in fact, possess a above-average understanding of US policy, as he has previously asserted.

**Economic dimension of the Summit.** The 3SI Business Forum was held for the seventh time in association with the Summit, thus establishing itself as a valuable platform for the convergence of entrepreneurs, policymakers, financial institutions and other relevant stakeholders. The Forum functioned as a conduit to encourage collaboration between the public and private sectors, with the aim of promoting investment and innovation in the Central and Eastern European region and beyond. The event was attended by representatives from GE Aerospace, InPost, Siemens, and Škoda, among other prominent companies. It is also worthy of note that the Forum was accompanied by a series of international scientific conferences. These were organised by the Institute of Political Studies of the Polish Academy of Sciences and the think tank Opportunity – Institute for Foreign Affairs.

In the summit declaration, the leaders of the 3SI adopted a progress report on the 143 priority projects under the 3SI. It should be noted that the majority of these projects are in the preliminary stages of implementation. Particular attention was paid to the BRUA gas pipeline, which has been under construction since 2018 and is expected to connect Bulgaria, Romania, Hungary and Austria ([IEŚ Commentaries 1164](#)). Other focal points included the LNG terminal on Krk Island, the completed synchronisation of the Baltic States' electricity with the European continental grids, as well as the major communication infrastructure projects - Rail Baltica, Rail2Sea, Via Baltica and Via Carpatia. The latter project involves the establishment of a network of expressways connecting the port of Klaipėda in Lithuania with Greek ports. The construction of the route has been completed in some countries (Hungary) and is at an advanced stage in others (for example, in Poland, the Lublin-Rzeszów section has been built, while the sections from Rzeszów to the Slovak border and from Lublin to Białystok are currently under construction). The challenge for the implementation of the Via Carpatia remains the 70 km of expressway from Prešov to the Polish-Slovak border in Slovakia, as well as several unfinished Carpathian sections in Romania.

The final declaration noted 3SI's contribution to creating resilient supply chains through nearshoring and friendshoring, supporting military mobility and developing climate-neutral and high-tech industries. The necessity to develop artificial intelligence, semiconductor technology and digital infrastructure in

collaboration with the EU and the US was emphasised. The importance of synergies between 3SI and other global and regional connectivity initiatives, including the Global Gateway, the Trans-Caspian Corridor and the India-Middle East-Europe IMEC Economic Corridor, was also stressed.

The document makes reference to the Three Seas Initiative Investment Fund, which was established in 2019 and remains underfunded. As of the beginning of 2025, the fund had accumulated approximately EUR 1.3 billion, although its target budget is set at between EUR 3 and 5 billion. The communiqué also included information regarding the work of the task force to establish an additional investment fund. The recently established Three Seas Initiative Innovation Fund, which is co-financed by the European Investment Fund, has already attracted initial investors: Poland, the Czech Republic, Hungary and Croatia. The overarching objective of this novel initiative is to provide financial support for the advancement of companies operating within the Central and Eastern European region.

### Commentary

- Ten years after its establishment, the Three Seas Initiative continues to encounter a number of substantial internal and international challenges. Key issues include maintaining political coherence and ensuring the full involvement of all participating states, a challenge made more complicated by dynamic changes in international relations and the persistent difficulty of altering the established foreign policy thinking of the 3SI countries, which is centred on the development of East-West cooperation and, to a lesser extent, North-South cooperation. The limited level of 3SI activity that has been observed in Austria for a considerable period of time is indicative of a long-standing trend. Furthermore, the position of Germany as a partner of the 3SI Initiative, in addition to its status as a significant member state of the European Union, which has been instrumental in the implementation of numerous 3SI initiatives, has been met with scepticism since the emergence of the Initiative. Furthermore, in certain countries, the stance towards 3SI is determined by intrapersonal political factors and ongoing political disputes. Despite the fact that Poland played host to the summit (formally organised by the Chancellery of the President of the Republic of Poland), no high-level representative of the Polish government was in attendance.
- The Three Seas Initiative has identified the need for enhanced coordination of the entire format's operational processes. At the present stage, the 3SI is experiencing difficulties even with such elementary issues as the correct and transmissible operation of the website (which is not updated in places), the responsibility for which is assumed by successive presidencies on an annual basis. Furthermore, there is an absence of a long-term promotional and information policy for 3SI activities, which would facilitate the establishment of a robust and internationally recognised initiative's brand. The enhancement of this initiative could be facilitated by the institutionalisation of the format through the establishment of a joint secretariat (in one country, a mobile office, or in Brussels, for example). An attempt to establish it was made by the Latvian delegation at the Riga Summit, which was not supported at the time. Analogous measures were initiated by the Hungarian authorities, however, ineffectively. Nevertheless, this would have given rise to concerns in certain countries regarding the establishment of an institutional alternative to, for instance, EU structures.
- A further significant challenge pertains to the procurement of long-term funding for ongoing infrastructure projects, which is required to be maintained at an appropriate level beyond the current commitment (dominated by EU and national funding from individual countries). As of 2025, of the 143 priority projects reported, only 14 have been completed and 19 are at an advanced level. Furthermore, a greater infusion of private capital into existing and emerging 3SI funds than before is also necessary.
- Notwithstanding the challenges encountered, the 3SI summit in Warsaw signifies the sustained commitment of regional countries to this form of economic and political collaboration. There is a distinct possibility that in the foreseeable future, a similar accession by the other Western Balkan countries to the 3SI as participating associate states may occur. In addition to their aspiration for north-south economic

advancement, these countries may perceive this as a component of a broader strategy to fortify their ties with the EU. The forthcoming summit, scheduled to take place in Croatia next year, is poised to serve as a valuable opportunity to consolidate the existing ties with the Western Balkan countries. In light of the recent modifications to the security architecture in the Baltic Sea region, Lithuanian diplomacy has signalled its interest in extending the format to encompass Finland. However, this proposal has not yet been realised. The Republic of Korea, whose considerable presence in the region is evident in the form of direct investments and arms and energy contracts, could also be a potential new strategic partner.

- The subsequent growth of 3SI is contingent upon its internal stability and the potential for additional political endorsement from external entities, particularly the European Commission and the US. For a considerable duration, the United States was the primary patron of the Initiative, perceiving it as a mechanism for the execution of alliance policy and the promotion of national interests. This was particularly evident in terms of deterring Russia, promoting energy independence in CEE from Russian gas and replacing it with US transfers, countering Chinese influence (political, such as the former '17+1' platform, or technological, such as 5G) in the region, and building influence within the EU. The ambiguous stance adopted by the Trump administration has given rise to questions regarding the maintenance of all dimensions of this policy, most particularly the 'political umbrella' and military engagement in the region. Nevertheless, the 3SI will undoubtedly retain its significance for the US in the energy sector. This encompasses both liquefied natural gas (LNG) exports and nuclear-related investments. This assertion is substantiated by the visit to Warsaw of the US Secretary of Energy, Chris Wright. In consequence of the shale revolution, the United States of America has become the world's leading exporter of natural gas. A number of the countries that are members of the Initiative import significant quantities of this resource. This development has been facilitated by the expansion of infrastructure for north-south transmission, including LNG terminals, interconnectors, and pipelines. Furthermore, a proportion of gas imported by Ukraine from the US is subsequently re-exported via this infrastructure. In March 2025, Dmytro Lyppa, the head of Ukraine's gas operator GTS, stated that the country is interested in increasing the transmission and purchase of up to approximately 4 bcm of gas, primarily from the US. The heightened demand for imports of this commodity is, naturally, attributable to the impact of Russian aggression on the energy infrastructure, which in turn impedes domestic productivity.

### Participants of the Warsaw Summit

#### Participating Countries

No.	Country	Date of Accession / First Participation in Summits	Representative at the Warsaw Summit
1	Austria	2016	Secretary General and Deputy Minister of Foreign Affairs Nikolaus Marschik
2	Bulgaria	2016	President of Bulgaria Rumen Radev
3	Croatia	2016	Prime Minister of Croatia Andrej Plenković
4	Czechia	2016	President of Czechia Petr Pavel
5	Estonia	2016	President of Estonia Alar Karis
6	Greece	2023	Minister of Foreign Affairs of Greece Georgios Gerapetritis
7	Lithuania	2016	President of Lithuania Gitanas Nausėda



8	Latvia	2016	President of Latvia Edgars Rinkēvičs
9	Poland	2016	President of Poland Andrzej Duda
10	Romania	2016	Acting President of Romania Ilie Bolojan
11	Slovakia	2016	President of Slovakia Peter Pellegrini
12	Slovenia	2016	Minister of Infrastructure of Slovenia Alenka Bratušek
13	Hungary	2016	President of Hungary Tamás Sulyok

#### Strategic Partners

No.	Country / Institution	Year of First Participation	Representative at the Warsaw Summit
14	Spain	2025	Secretary of State for EU Affairs of Spain Fernando Sampedro Marcos
15	Japan	2024	Ambassador of Japan to Poland Akira Kono / pre-recorded address by Prime Minister Ishiba Shigeru
16	European Commission	2018	Director for Energy Policy at the Directorate-General for Energy, European Commission Cristina Lobillo Borrero
17	Germany	2018	Ambassador of the Federal Republic of Germany to Poland Viktor Elbling
18	United States	2017	Acting Assistant Secretary of State, Office of International Affairs, U.S. Department of Energy Tommy Joyce / Secretary of Energy Chris Wright on day one
19	Turkey	2025	Minister of Transport and Infrastructure of Turkey Abdülkadir Uraloğlu

#### Participating Associated States

No.	Country	Year of First Participation	Representative at the Warsaw Summit
20	Albania	2025	President of Albania Bajram Begaj
21	Montenegro	2025	President of Montenegro Jakov Milatović
22	Moldova	2022	Deputy Prime Minister, Minister of Infrastructure and Regional Development Vladimir Bolea
23	Ukraine	2022	Deputy Prime Minister for Ukraine's Reconstruction Oleksii Kuleba / Remote participation by President Volodymyr Zelensky