The Baltic Pivot: Poland's Strategic Reorientation

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Introduction

Poland is situated in the middle of the Great European Plain and with few natural barriers, it has always been an important transportation corridor on the west-east axis. Since its accession into the EU and NATO, Poland became the linchpin of NATO's Eastern Flank. This position has only gained in importance after the start of the Russian full-scale invasion of Ukraine in 2022. As the only country which borders both Ukraine, Russia

and Belarus, Poland simultaneously became a frontline state and one of the most crucial European logistics and transportation hubs. This is evident in the fact that more than 95% of all aid for Ukraine passes through Poland (Rozgon, 2025). Another aspect of Poland's location is that the nation is situated not only on the crossroads between west and east, but also between north and south. It sits right in the middle of what some analysts dubbed the Baltic-Black Sea Bridge (*Pomost bałtycko-czarnomorski*). Envisioned as a separate geopolitical region between the Western European rimland and the Eurasian heartland, it connects Turkey and the Caucasus with Scandinavia (Dryblak, 2019; Bartosiak, 2020; Wójcik, 2021). Since Sweden and Finland joined NATO, the awareness of the importance of the north-south axis has been steadily increasing in Warsaw. As the European security environment undergoes its most profound transformation since the end of the Cold War, Poland might need to reorient itself more towards this vector, and especially towards its neighbours across the Baltic Sea.



Figure 1: Map of the Baltic-Black Sea Bridge region (blue), connecting Scandinavia with Turkey-Caucasus (green), borders of Russia and Belarus marked in red (Source: Own Work).

Legacy of Historical Memory

The last time an active northern vector was present in Polish strategic thinking was more than 400 years ago, when Poland-Lithuania and Sweden battled for supremacy in the Baltic Sea region. Despite a series of eight brutal wars (1597-1721), neither side achieved ultimate victory. Instead, a third player joined in – Russia. In effect, the Polish-Swedish wars paved

the way for centuries of Russian hegemony over Eastern Europe (Janicki, 2022). Prussia was another beneficiary. As a direct result of the Polish-Swedish Wars, it broke free of Polish overlordship in 1657, starting its road towards the formation of the German Empire. After that, the Baltic Sea was no longer perceived as a strategic space enabling power projection, regional integration or alliance-building. This is why, for a long time, Polish grand strategy neglected the north-south axis. Instead, the west-east axis gained absolute predominance. This spatial orientation is felt especially strongly in regional infrastructure. In the last two centuries, Central-Eastern Europe functioned as a space organised around external relations, rather than as a coherent region, and to this day, west-east infrastructure remains considerably more developed than north-south linkages. This is true not only about roads and railways, but also about pipelines, hindering regional energy security and facilitating energy dependence on Russia (Garding & Mix, 2025).

Such realities gave rise to two different conceptions of what the geopolitical objectives of an independent Polish State should look like (Kubera, 2016; Fiedorczuk & Parkasiewicz, 2024). The first one is known as the **Piast Idea**. Named after the Piast Dynasty, which was the first historical ruling house of Poland, the Piast Idea assumes that Poland should focus primarily on building a strong, cohesive and economically prosperous nation-state, closely integrated with Western Europe. The other conception is the so-called **Jagiellonian Idea**. It takes its name from the Jagiellonian Dynasty, which was responsible for the creation of the Polish-Lithuanian Commonwealth. It posits that Poland must assume a proactive role in Central and Eastern European politics because national security depends on actively shaping the situation in its eastern neighbourhood.

The End of History

Despite being often seen as contradictory, both the Piast and the Jagiellonian Ideas are in agreement at the fundamental level (Maj et al, 2023; Siemiątkowski, 2025). Overall, Poland's strategic objectives are remarkably consistent, no matter the political faction currently at the helm of power. Those objectives are twofold: to anchor itself in the West, thus seeking to reduce economic, technological and institutional disparities vis-à-vis Western Europe; and to contain Russia, thus keeping it outside of the European economic, political and security system (Bartosiak, 2025). Both Ideas can be seen as two archetypal postures, which essentially share the same objectives, but prioritise them differently and focus on different ways to achieve said priorities. Historically, Poland oscillates between both, depending on the given geopolitical circumstances.

While the Second Polish Republic (1918-1939) was following a quintessentially Jagiellonian policy, the Third Polish Republic, born after the fall of the communist dictatorship in 1989, has been implementing a policy

steeped in the Piast Idea. Entries into NATO (1999) and into the EU (2004) integrated Poland deeply with the West, resulting in massive economic, institutional and societal reforms. As a result, the Polish economy grew by approximately 170% since 2000, becoming the world's 20th largest economy in 2025 (OECD, 2025). Simultaneously, the umbrella of NATO collective security and famously "ironclad" American guarantees gave room for a confidence in national safety not felt since at least the 18th century. Although some elements of the Jagiellonian Idea are also present in Polish foreign policy, the arrow of focus pointed decisively west, towards further internal development. The vision of Fukuyama's *End of History* became the fulfilment of all the dreams of Polish political elites and proof of the ultimate success of the Piast Idea. The prosperous future of Poland was to rely solely on two pillars: a strong alliance with the hegemonic power of the United States, its principal security guarantor, and membership in the EU, which finally rejoined Poland with the European community. There was nothing more to be done – the correct course had already been set.

In Search of Deterrence

In recent years, this paradigm has started to rapidly collapse. The Russian invasion of Ukraine brought modern war to Poland's doorstep while the nation continuously faces the threat of an ongoing hybrid warfare perpetrated by Russia and Belarus (Olech, 2026). Perhaps most worryingly, the twin pillars, upon which the last few decades of Polish policy rested, began to distance themselves from each other. During the second presidency of Donald Trump, it became obvious that Transatlantic ties between the EU and the US are breaking down. Despite the fact that the White House hails Poland as a model ally and Polish-American relations remain very close, the volatile actions of the Trump Administration resulted in a sharp drop in trust in US leadership (Bednarczyk, 2026). In May 2026, a surprise announcement made by US officials about a withdrawal of 4000 American troops from Poland caused bewilderment and confusion. Those feelings were hardly lifted even after Donald Trump publicly contradicted this policy a few days later, when he declared he would send an additional 5000 troops to Poland (Carlson & Cook, 2026). This reinforces concerns about deliberate weakening of American security guarantees. On the other hand, there are serious doubts regarding the stances, capabilities and credibility of many European allies as well. Especially frustrating for Poland is the constant and consistent disinterest of some Western European states, especially Germany and France, in formally repealing the 1997 NATO-Russia Founding Act. The Founding Act committed both sides to not see each other as adversaries, hold regular consultations, as well as restrain permanent deployments on the Eastern Flank. It is still officially in force, long after Russia stopped holding up its end of the bargain. From the point of view of Poland and other allies on NATO Eastern Flank, the Founding

Act creates a structural security asymmetry between "old" and "new" NATO members (Dyner et al, 2022; Bienvenu et al, 2024).

All those factors put into question the feasibility of the previous format of Polish grand strategy. At the same time, a tangible deterioration of Polish security has made the search for new ways of deterrence a necessity. Perhaps the most striking example of this process can be found in Donald Tusk's statements made in March 2025. In a speech to the Parliament, he said that Poland cannot restrict itself to conventional weapons and thus should look at gaining access to nuclear weapons. He also formulated a desire for the ongoing modernisation of Polish armed forces to lead to an army of 500,000 men (Cienski & Kość, 2025). Another sign pointing at the end of the "nuclear taboo" in Poland is the publication of the book titled "Our Bomb. Does Poland Need a Nuclear Strategy?" (*Nasza bomba. Czy Polska potrzebuje strategii jądrowej?*) by Albert Świdziński, which took place in February 2026 and was met with considerable interest. The same topic was also hinted at in the new "Strategy of Polish Foreign Policy 2026-2030", officially published by the FMA in March 2026, for the first time in almost a decade. On page 11 of the document, it is said that "growing uncertainty regarding allied guarantees may encourage other countries to seek additional security, including nuclear capabilities".

Looking North

Recognition of the fundamental importance of both European and Transatlantic cooperation remains one of the core principles of the new Polish Foreign Policy Strategy. A lot of its content, however, suggests a grand return of the Jagiellonian Idea. Russian aggression is directly named as the greatest threat to national security, while an active policy in Poland's eastern neighbourhood is mentioned as necessary to confront and contain Russia. This format includes not only Ukraine, but also countries under heavy Russian influence, like Belarus and Moldova. Moreover, the document depicts a rising recognition of the north-south axis' role. The Three Seas Initiative (3SI) is recognised as an important economic project aimed at strengthening the infrastructural interconnectivity of the region overlapping with the Baltic-Black Sea Bridge – and thus aimed at increased resilience of the eastern half of Europe and reduced disparities vis-à-vis the West. Forging of closer ties between the European Union and countries of the South Caucasus is also explicitly stated as one of the desirable policies, which could be seen as a flanking manoeuvre against Russia through the erosion of its sphere of influence.

At the same time, it's the northern vector that holds a particular interest in Poland's foreign policy. The Strategy clearly states that relations with the Nordic and Baltic states have a special place because those countries share with Poland a similar perception of the seriousness of the Russian threat. Both Finland and Sweden demonstrate considerable military capabilities.

In addition, Sweden possesses one of the most robust and advanced military industries on the continent. Therefore, strengthening the region's role in shaping the strategic policies of the EU and NATO is in Poland's national interest. Geography, history, common geopolitical interests and cultural ties unify the Baltic Sea region, creating a fertile ground for increased military, political and economic cooperation. Although in the initial stages, some of this is already happening (Government Offices of Sweden, 2025). Such regionalisation would be a key factor for successful deterrence, containment and, in case of open war, victory over Russia in the east. From the point of view of Polish grand strategy, those conditions necessitate a strategic reorientation towards the north – a move which can be dubbed as the Baltic Pivot.

Currently, Poland faces the prospect of deteriorating Euro-American relations and a shift in American priorities away from NATO toward bilateral transactionalism. This environment presents the Polish leadership with three distinct strategic possibilities.

The first option—favored by the camp around President Karol Nawrocki—prioritizes a strategic alliance with the United States. As the West's premier military power, the US offers access to advanced hardware, intelligence sharing, and potential nuclear deterrence. Poland's status as a reliable ally makes this path accessible. However, its main flaw is extreme vulnerability to factors beyond Polish control. Overreliance on Washington risks critical security gaps if the White House shifts its focus or reduces its commitments. Furthermore, dependence on American technology gives Washington veto power over Polish operational escalation—a dynamic that hindered Ukrainian military operations and could prove disastrous if Polish and American strategic interests diverge. An overly Atlanticist posture also risks alienating Western European partners, eroding Warsaw's leverage within the European Union.

The second option—favored by Prime Minister Donald Tusk's government—prioritizes European cooperation. Ideally, this allows Poland to shape continental defense initiatives from within. The Strategy of Polish Foreign Policy underscores the Weimar Triangle in this context, assigning it central importance in security, key EU policies, and transatlantic relations while advocating reforms to enhance Europe's geopolitical weight. The primary challenge, however, lies in whether Europe can realistically replace American military capabilities. Many European nations, particularly those far from the Eastern Flank, struggle to meet basic defense spending targets. Moreover, threat perceptions across Europe remain fragmented. Should pro-Russian or isolationist forces assume power in key Western European capitals, a strategy focused strictly on European defense could leave Poland dependent on unreliable partners.

The third possibility centers on regionalization and building a security-focused bloc around the Baltic Sea. Long neglected in Polish foreign policy, this option represents the most innovative yet challenging path. To maximize leverage while mitigating risks, Poland should navigate its internal political divide by cooperating with both European and American partners without committing exclusively to either. Simultaneously, it must build a resilient Baltic Sea security architecture as a third strategic pillar. Poland, Sweden, and Finland take military investment seriously, and their publics display a high willingness to defend their nations (Andžāns, 2026). Given the immediate proximity of the Russian threat, the political risk of a sudden policy shift toward Moscow is minimal in these capitals. Regionalization enables rapid decision-making, deep defense-industrial integration, and enhanced resilience against hybrid, cyber, and critical infrastructure threats, thereby strengthening the geopolitical agency of the Baltic-Black Sea region.

Based on this framework, three key policy recommendations emerge:

1. Secure permanent membership in the Nordic-Baltic Eight (NB8)

Presently, the Council of the Baltic Sea States is the primary body uniting Poland with Scandinavian nations, but its focus centers on environmental and cultural engagement rather than defense. The NB8 format is far better suited for current security imperatives. Although Poland is not a formal member, it already participates in NB8 ministerial meetings, political consultations, and sectoral initiatives. Formalizing permanent Polish membership in the NB8 is a logical geostrategic move that directly addresses current regional realities.

2. Establish close military integration with Sweden

As the primary military powers in the Baltic region, Poland and Sweden naturally complement each other on NATO's Eastern Flank. They project power across key containment zones: Poland facing Belarus and Kaliningrad, and Sweden managing the Arctic and central maritime domain. A structured framework for regular joint military exercises is essential. Deploying Polish forces to help garrison Sweden's strategically vital island of Gotland, alongside rotational deployments of Swedish units to the Polish coast, would solidify this axis.

Joint operational planning must extend beyond passive defense. Lessons from the Persian Gulf demonstrate that a conventionally weaker force can achieve significant strategic leverage over a major power by securing operational control over key maritime choke points. The Baltic features three critical choke points: the Danish Straits, the Gulf of Finland, and Kaliningrad. In any open conflict with Russia, Kaliningrad will be a central operational theater. While Poland can isolate the enclave by land and air,

enforcing a complete maritime blockade requires close operational coordination with Sweden.

3. Reduce overreliance on the US defense industry

Arms purchases do not function as implicit security guarantees. Overreliance on US suppliers creates critical operational vulnerabilities, granting Washington effective control over Poland's escalation options. In a conflict with Russia, Washington might attempt to restrict Polish strikes against targets in Belarus or Kaliningrad out of fear of broader escalation, even if such strikes are militarily necessary for Polish survival.

Poland must reorient its strategy toward domestic and regional defense-industrial cooperation. European suppliers offer shorter, more secure supply chains, but the ultimate objective must be a self-sustaining Polish defense-industrial base capable of maintaining wartime production. Deepening ties with Ukraine—particularly in drone warfare and long-range missile development—is vital. Additionally, expanding defense-industrial partnerships with Sweden and Turkey, both of which possess advanced defense sectors and anchor Russia's northern and southern flanks, will bolster Poland's autonomy. Leveraging its position on the north-south axis allows Poland to fortify a broader network of states along the Baltic-Black Sea bridge committed to containing Russian expansionism.

Conclusions

As the old international order breaks down, the rift between America and Europe deepens, and uncertain political developments hang over both sides of the Atlantic, the Baltic Sea becomes the most crucial geostrategic direction for Poland. Common interests and threat perception tie the region together. Cooperation in this format would increase the geopolitical agency of the entire Baltic-Black Sea Bridge and allow Warsaw to construct a third pillar of its security. In order to achieve that, Warsaw should take a more proactive role in its neighbourhood, establish a close military partnership with the Scandinavians and take serious long-term steps towards developing its own national military industry. This must include modern drone warfare technologies, long-range missile capabilities and full control over Poland's escalation capabilities. Such a path offers the best way of deterring or repelling a possible Russian aggression, securing national interests, and thus Poland's place in the new European security architecture.

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