

[IV 2026 - The Three Seas Initiative EN](#)

Over the past three decades, the countries of Central and Eastern Europe have undergone one of the largest and most successful transformations in modern history. Having transitioned from centrally planned economies to dynamic market economies driven by innovation, the Three Seas region has emerged as a key driver of growth both within the European Union and beyond. Today, the region's population reaches 120 million, and its combined GDP has exceeded €4 trillion - a scale comparable to that of the world's largest economies.

The latest report from the Sobieski Institute demonstrates that the Three Seas Initiative is more than just a platform for cooperation. It is a macro-regional force based on proximity ensured by infrastructure, energy, and digital connections. It is an increasingly cohesive space of economic convergence, industrial power, and technological potential. The region's dynamic growth, resilience to global disruptions, and growing role in global value chains make the Three Seas Initiative an increasingly important pillar of European competitiveness.

Poland's invitation to participate in the G20 marks a turning point of historic significance.

For the first time, the Three Seas Initiative's voice can be heard directly, in a forum where the rules of the global economy are being established. This is a historic opportunity not only to strengthen regional cooperation, but above all, to articulate the common interests of the region's countries on a global stage. The Three Seas Initiative is no longer just a beautiful vision of closing the development gap. It is a reality. It is becoming a force co-shaping the future of Europe and the global economy.

This document presents an analysis intended to serve all countries in the region, focusing on four areas:

- 1. the economic potential of the Three Seas Initiative** – its scale, dynamics, and structure, as well as the role of human capital and innovation;
- 2. the history of transformation and the importance of foreign investment** – as a foundation for development and a source of economic resilience;
- 3. the new stage of development: the global expansion of**

companies from the region – along with the identification of sectors in which the Three Seas Initiative has competitive advantages;
4. **the importance of the region's international representation** and the opportunities created by the cooperation of the Three Seas countries in global formats, including in the context of Poland's invitation to the G20 Summit in Miami.

Methodologically, the report draws on two sets of sources. The first consists of 3SI's definitional and institutional documents: summit declarations, 3SI Research Center materials, official summit websites, and information about the 3SIIF fund. The second consists of statistical and benchmarking sources, including data from Eurostat, the IMF, the UN, the OECD, the European Commission, the World Bank, and NATO. This distinction is necessary because the Three Seas Initiative does not have its own centralized data system. As the 3SI Research Center points out, the lack of a permanent secretariat and headquarters has so far hindered the systematic organization of the Initiative's documentation.

Dubrovnik has been a center of trade, diplomacy, and the exchange of ideas for centuries. **“O liepa, o draga, o slatka slobodo”** – these words by the 16th-century poet Ivan Gundulić – capture the meaning of freedom – understood as the freedom to act, exchange, and create – that underpinned the city's development. Today, these same values underpin cooperation among the Three Seas countries, working together to build an open, stable, and competitive region.

Together, we have created a region that is not only closing the development gap but is also increasingly co-creating global solutions. Together, we can also strengthen our position in the global economy – working towards the security, prosperity, and stable growth of all Three Seas countries.

The authors of the report are:

- Marcin Chludziński
- Jadwiga Emilewicz
- Przemysław Humięcki
- Aleksandra Lisicka-Firlej

- Leszek Skiba
- Radosław Żydok

We invite you to read it!

THREE SEAS INITIATIVE IN NUMBERS

4.12 trillion EUR

was the value total of the GDP (PPP) of all 3 Seas Initiative countries in 2025, while the size of the German economy was 4 trillion EUR.

2x faster

was the pace of GDP per capita growth in the 3SI countries between 2016-2025 compared to the largest economy in the EU, i.e. Germany (67.3% in the 3SI countries vs 33.4% in Germany)

61.5%

was the rate of increase in disposable income in the 3SI countries between 2014-2024. It was much higher than the EU average (48.3% in the EU27) due to dynamic growth in average net wages (the increase was 77.4% in nominal terms in the 3SI countries vs 42.9% in the EU27)

77.4%

was the increase in average net wages in nominal terms (42.9% in the EU27)

4.7% PKB

was the value of the average FDI inflow to 3SI countries in 2000-2019, much more than the average for both: the developed (3.3% GDP) and emerging economies (2.7% GDP)

21x

was the cumulative increase in Central Europe in 2004-2022.

+12.60% GDP

was the rate of Slovenia's improvement in NIIP (from 44.40% GDP in 2012), becoming probably the first 3SI country to have transitioned from "the recipient of capital" to "the provider of capital" status.