

# POLAND IN THE G20 IT IS JUST THE BEGINNING

## A NEW IMPETUS FOR DEVELOPMENT



**85%** OF GLOBAL GDP IS GENERATED BY  
THE **COUNTRIES BELONGING TO** **G20**



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## G20 IN NUMBERS

**19**

countries and two unions (the European Union and the African Union) belong to the G20. Poland could become the 20th member.

**85%**

of global GDP is generated by G20 member countries.

**\$1.1 TRILLION**

is the sum Poland's GDP will amount to in 2026. In terms of GDP, this gives us the 20th position globally.

**1999**

is the year when the G20 was established.

**75%**

is the G20's share of global trade.

**7**

recommendations regarding Poland's participation in the G20 are presented in our report.

**130 BILLION PLN**

is the sum total of the loan portfolio of the Central and Eastern European Development Bank whose establishment we propose in the G20 report, after a few years of its operations.

**2/3**

of the world's population live in the G20 countries.

**2026**

is the year by the end of which the Polish Ministry of Foreign Affairs should launch a Polish consultation platform for middle-income countries such as Türkiye, South Korea, Mexico, Indonesia, Australia, and Argentina in line with our recommendations.

## FOREWORD

“LET OUR EYES SEE THE BROAD PERSPECTIVES AND OUR HANDS GET BUSY WITH THEIR DETAILS.”



Radosław Pyffel

**A**s of today, the Group of Twenty (G20) remains the only global governance forum where the U.S., China, India, the European Union and its major Member States, and the most important representatives of the Global South meet at the table. It is the space for informal yet substantive diplomacy among the leaders of the world's greatest powers, and - at the same time - it is also where the agenda impacting such institutions as the IMF, the World Bank, the OECD, and even the EU itself is formulated.

Participation in the G20 may prove to be Poland's greatest international advancement since joining the European Union. It would be the symbolic culmination of the period in the history of Poland - and the European continent - that began with the Autumn of Nations in Eastern Europe and has given us over three decades of civilizational development, during which the national economy has grown to a level placing it among the twenty largest in the world. In this context, President Donald Trump's invitation of Poland to the G20 summit became something entirely natural, met with understanding by other countries and powers as well.

But that's all in the past...

As we have noted in many parts of this report, Poland's participation in the G20 is not merely a matter of prestige, a chance to get photos with the leaders of the world's largest economies, or to dwell on the past, and even to organize, on the sidelines of the Miami summit, an event celebrating Poland's progress over the past decades.

If Poland's presence in Miami is to have any meaning, it must above all mark the opening of a new chapter. It must create a space to cast a fresh and original look on both Poland itself, the G20 and the global community. It must constitute a step forward. Provide a new "Idea for Poland."

That is exactly what we aim to do in this report.

We have divided it into two parts. In the first part, written by Dr Agnieszka Rymysz, we describe what the G20 is, how it came into being, what agenda it has, and what happened during the recent summits.

In the second part, we focus on specific actions and recommendations, such as: the establishment of a new development bank, a coalition of middle-income countries, making defense a public good, a "resilient economy" for the new era, and the "G20-50 Program for Poland" by Krzysztof Domarecki, founder, long-time CEO, and chairman of the supervisory board of the Polish global company Selena FM S.A.

Finally, to temper the enthusiasm somewhat, we offer a sobering assessment by Maciej Wilk and Michał Czarnik (president and vice president of the “Yes to CPK” Association), highlighting the weaknesses and shortcomings that burden Poland as it’s embarking on this new journey.

Attached to this report, in the form of an appendix, are the recommendations formulated during the “Ideas for Poland Forum” organized by the Sobieski Institute, which – even if they do not

pertain to be G20 directly – we do consider as worth mentioning in this context.

What do the texts, ideas, and positions presented in this report have in common? We hope that they will capture the interest of the public and policy-makers, and serve as a starting point for a broader public discussion. The common thread running through all the analyses included here is a set of fundamental beliefs.

Firstly, we assume that while the G20 provides an attractive platform for presenting one’s perspective on the global stage (and one for which it is worth preparing carefully and thoroughly), this is only the beginning.

In essence, it’s about something more: creating a new impetus for Poland’s development, devising a new model for how the Polish State should operate. And it’s not just about the G20 (though that’s part of it, obviously), but also about the fact that the world has changed, and so has Poland herself and we are facing entirely new challenges.

Creating this developmental impetus will require—and this is the second point — that we step out of our comfort zone, think boldly, and, in fact, redefine our mindset. It is essential for Poland to not be just another voice parroting the European or Western mainstream discourse. For if it is to merely repeat the existing narratives, why should it be heard at the G20, where similar positions are already represented by so many others?

However, the objective is not to stand out at all costs, but for Poland to be able to define its interests more independently and take greater responsibility for shaping its own international environment than it has done in the past. The Miami summit and participation in the G20 are merely a stop along the way.

Many words—perhaps overly grand—have been spoken here, but... thirdly, in this report we wanted to move away from promoting Poland’s participation in the G20 in the context of high politics, pompous rhetoric, and symbolic, too often empty gestures. We recommend specific and practical solutions and explain how to implement them.

Fourthly, pragmatism. Instead of clinging to the world that no longer exists and a status quo that has collapsed, instead of wringing our hands, complaining, or looking for someone to blame, we are trying to move forward, seeking a way to function within the new international dynamics. This does not mean a complete and en bloc rejection of what was, but it certainly constitutes an attempt to redefine patterns and adapt them to the new reality.

Fifthly, participation in the G20—which brings together countries of diverging interests, as well as different political traditions and cultures—requires the ability to balance and combine a wide range of skills and often non-obvious perspectives. Only then, as the summit host says, can an “effective deal” be secured. The ability to navigate smoothly between these perspectives is essential not only in a forum like the G20, but in the modern world in general...

That is why, in this report, we have sought to examine Poland’s agenda for participation in the Miami summit from multiple angles, covering the entire spectrum of topic: from security through development, economy, soft power, international relations to global trade.

We invited individuals with unique experience gained in the central administration, finance, economics, business, and diplomacy – people who are all well-versed in the perspectives adopted by the US, Europe, Latin America, Asia and the Global South - to contribute to this report. Among them are: Jadwiga Emilewicz, former Deputy Prime Minister; Dr. Agnieszka Rymysz, former Deputy Ambassador of Poland to Argentina; Krzysztof Domarecki, founder of the Polish global company SELENA, which successfully competes in the global markets, including the G20 countries; Leszek Skiba, former Deputy Minister of Finance and President of Bank Pekao S.A.; and Maciej Wilk and Michał Czarnik—leaders of the pro-development social movement “YES TO CPK.”

For many of the reasons mentioned above, we believe—and this is our sixth point—that Poland is a country of “new energy” and unique experiences. A country ideally suited to balance and integrate multiple perspectives, to serve as a bridge between the old powers (including Old Europe and the European Union) and the non-European world, between Central and Eastern Europe and the West, between already wealthy nations and those still developing, and between history and modernity.

Finally—last but not least—seventhly: realism, but coupled with vision and imagination. We will need plenty of the latter, both within the G20 and more broadly in this new world. We realize that some of what we have written may “age poorly,” and that some of our proposals and recommendations may seem to be going too far. However, we have concluded that such is the privilege—and even the duty—of experts and commentators: that we are free to formulate bold and thought-provoking proposals, even when experience shows their full implementation may be difficult. We do consider this to be an efficient way to stimulate the necessary reflection and discussion, and contribute to the development of constructive solutions.

For Poland, the participation in the 2026 G20 Summit in Miami is a mark of prestige, a symbolic confirmation that its status is growing internationally, and a culmination of an important period in the country’s history.

At the same time, it marks the beginning of a new chapter, constituting a step out of the comfort zone and into a world of new dynamics.

For it is impossible to “move forward while turning one’s back on the past.”

It is also impossible to move forward without “letting our eyes see the broad perspectives and our hands get busy with the details.”

That is why we have prepared this report for you. We hope you find it inspiring.

Radostaw Pyffel  
March 2026

# WHAT IS THE G20?



Dr Agnieszka Rymsza

In the introduction to this report, we present information regarding the Group of Twenty (G20) to provide context for our discussion of recommendations on how to leverage our presence in this forum.

The G20 was established on the initiative of the finance ministers and central bank governors of the G7 countries, with the support of the International Monetary Fund (IMF) and the World Bank<sup>1</sup> as a response to **the financial crises of the late 1990s**, particularly the Asian financial crisis of 1997–1998. The inaugural meeting took place in Berlin in June **1999**<sup>2</sup>.

## OBJECTIVES

By the end of the 20th century, it became clear that the existing forum of the wealthiest nations (G7) was insufficient to address global economic challenges. Crises affected large **emerging economies** who had no real influence on global financial decisions.

### The G20 was established as a forum for coordinating global economic policy. Its objectives were:

- coordinating economic and financial policy;
- preventing financial crises;
- including of the most important emerging economies in the global dialogue.

1 The Bretton Woods Institutions.

2 See P. Wójcik, *What Is the G20 and Why Does Poland Want to Be in This Group?*, March 31, 2022, <https://krytykapolityczna.pl/gospodarka/co-to-jest-g20/> [accessed: January 14, 2026]; *What Does the G20 Do?*, November 18, 2025, <https://www.cfr.org/backgrounders/what-does-g20-do> [accessed: January 14, 2026]. See also: Aleksander Surdej, Dariusz Mongiatio, *The Functioning and Future of the G20 in the Era of Geopolitical Tensions at the Beginning of the 21st Century*; ; A. Surdej, D. Mongiatio, *The Functioning and Future of the G20 in the Era of Geopolitical Tensions at the Beginning of the 21st Century*, [in:] E. Jasiuk, A. Chochowska (eds.), *Building a Sense of Security in Times of Pandemic and the Threats of Terrorism and War*, Warsaw 2023

Developing a common financial policy remains the G20's main objective to this day. Initially, the group operated primarily at the ministerial level. Since the 2008 financial crisis, when the first official summit composed of the heads of state was held, the Group has become the primary tool for coordinating global economic policy. Over the years, the scope of discussions has expanded to include climate, health, and technology issues as well.

### Current members

#### G20 MEMBERS

1. Saudi Arabia
2. Argentina
3. Australia
4. Brazil
5. China
6. France
7. India
8. Indonesia
9. Japan
10. Canada
11. South Korea
12. Mexico
13. Germany
14. South Africa
15. Russia
16. United States
17. Türkiye
18. United Kingdom
19. Italy
20. European Union
21. African Union

Almost all G20 members have been part of the Group since its inception in 1999. Only the African Union joined during the summit in India in 2023, thereby becoming the 21st permanent member of the Group. Its official representation was already visible at the 2024 summit in Brazil, which significantly strengthened the African continent's participation in the global economic forum.

Despite its name (G20) and its formal composition (19 countries and 2 organizations), the Group is often referred to as having 20 or 21 "members".

G20 members account for generating approximately **85% of global GDP**, which makes the Group a forum for the world's largest economies responsible for a significant portion of the global trade (approximately 75%).

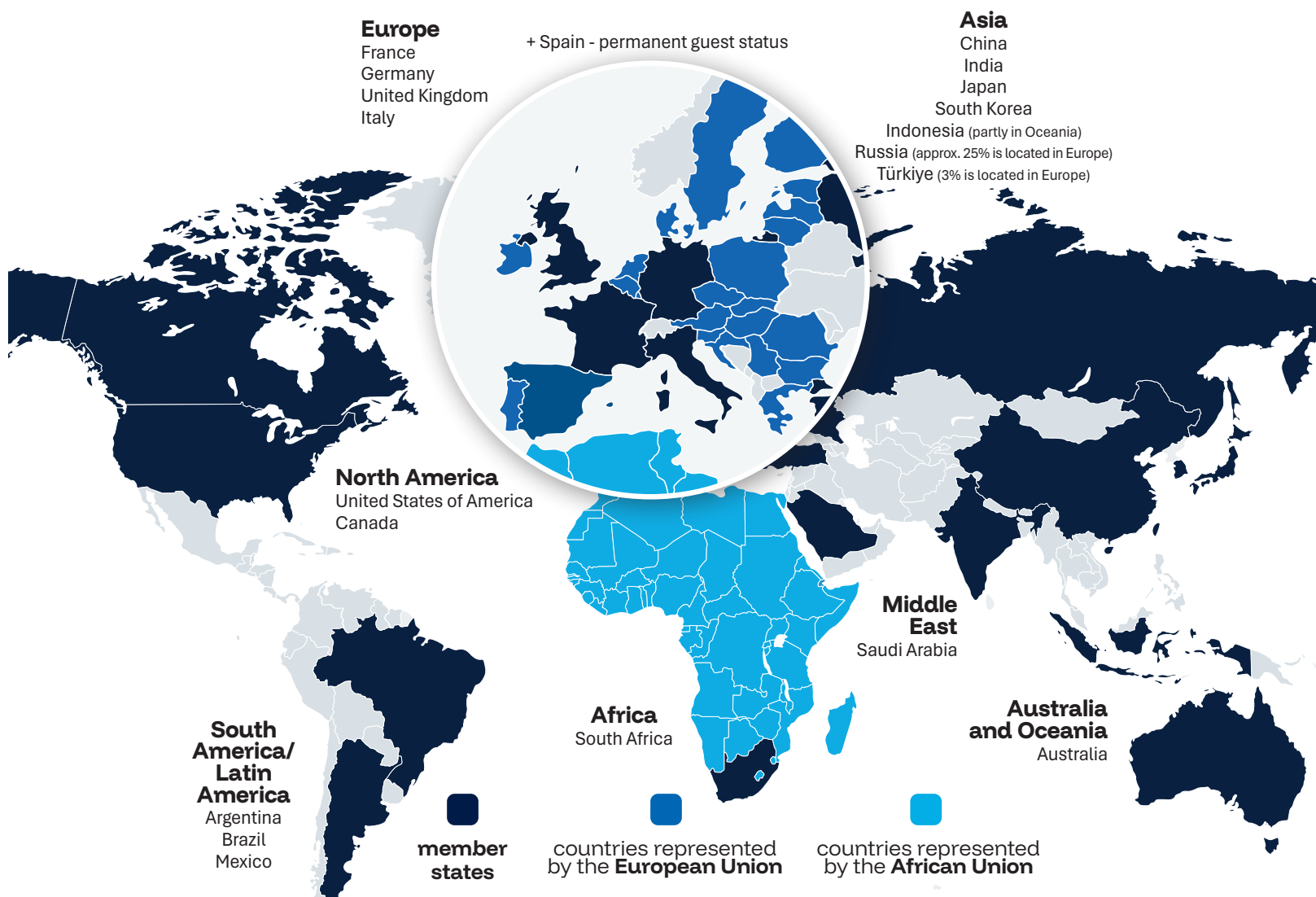
The G20 members, including the EU and the AU, are jointly home to about two-thirds of **the world's population** (with a significant portion of this number consisting of the residents of China and India).

## HOW DOES THE G20 WORK?

**Within the G20, decisions are made informally and consensually**, as it is not an international organization but a cooperation platform.

The **consensus principle** is the most important principle governing the Group's operations. There is no voting, every specific proposal needs to be supported by every G20 member. A decision is considered to be reached when there is no formal objection. This modus operandi is also the main reason why G20 documents are often compromise-based and general in nature.

**G20 GROUP - CURRENT MEMBERS**  
[ALSO REPRESENTED BY THE EUROPEAN UNION  
AND THE AFRICAN UNION]



## G20 GROUP MEMBER COUNTRIES

**85%**  
of global GDP

**75%**  
of global trade

**2/3**  
of the world's population  
(with China and India accounting  
for a significant portion of this figure)

Almost all G20 members have been members of the Group since its inception in 1999. Only the African Union joined as a permanent member at the G20 summit in India in 2023. This made it the 21st member of the group, and its official representation was already visible at the summit in Brazil in 2024.

Due to the rule of unanimity within the G20 – unlike in the Group of Seven (G7) – and given the participation of countries such as China and India (and perhaps now Brazil and Mexico), it is not possible, for example, to expel Russia from the Group in the wake of its invasion of Ukraine.

### DECISION-MAKING IN THE G20 IS A MULTI-LEVEL PROCESS

It begins with a working phase that lasts several months. In this phase, the experts and officials, organized into working groups, prepare draft:

- statements
- declarations
- action plans.

It is at this stage that the most important substantive decisions are made.

Next, ministers (of finance, economy, climate, etc.) discuss and “smoothen out” contentious issues, work out compromises, and provide the documents with a political direction. Meetings of finance ministers are also held in the meantime, and since 2024, meetings of foreign ministers as well.

During the summits, which take place at least once a year (between 2008 and 2010, two summits were held each year), usually toward the year’s end, the leaders of G20 member states (presidents, prime ministers) approve the agreements and adopt a final declaration. But this is a stage of political confirmation, not technical negotiations.

**G20 decisions are not legally binding.** They take the form of declarations, political commitments, or recommendations. They are therefore political in nature, not legal.

The G20’s real power stems more from the economic might of its members and their reputation, as well as from the international pressure they can exert.

The member states themselves implement the agreements on a voluntary basis (via national legislation). However, decisions taken at G20 summits are often implemented by international institutions such as the IMF, the World Bank, the UN, or the OECD<sup>3</sup>.

That is why representatives of these institutions take part in G20 meetings and summits. Also civil society organizations (e.g., Women20, Youth20), think tanks, and invited countries<sup>4</sup> participate in these meetings and summits.

3 For example, the global minimum tax is being implemented by the OECD, not the G20 itself.

4 Taking advantage of this opportunity, the United States, as the 2026 G20 chair under President Donald Trump, invited Poland to participate in the G20 summit, which will take place in December 2026 in Miami, Florida.

 **G7, G20 AND G77**  
– KEY DIFFERENCES

## G7

**7** countries

**The G7 is an informal group of the seven richest and most developed democracies in the world, comprised of the United States, Canada, Japan, Germany, France, the United Kingdom, and Italy.**

The G7 is less representative globally than, for example, the G20, due to the absence of countries such as China, India, Russia, or Brazil. The group was established in 1975 and focuses on economic policy, security, and climate issues. It is politically influential but its reach is limited. It was originally formed as the G6. In 1976, after Canada joined, it transformed into the G7. Russia used to be a member of the group (at that time, it operated as the G8)\*.

## G20

**19** countries  
+ the European Union  
and the African Union

**The G20 is a group of 19 countries and two unions (the European Union and the African Union).**

It is a cooperation forum for the world's largest economies (both developed and emerging), which account for about 85% of the global GDP. It is not an international organization (it has no permanent headquarters), but currently it is the most important global economic forum, playing a significant role during financial crises. The G20 was established in 1999.

## G77

**130** countries

**The Group of 77 (G77) consists of over 130 developing countries (including from Africa, Asia, and Latin America).**

It was established in 1964. It is a coalition of countries from the Global South and operates primarily within the United Nations. Although it now includes many more countries than the original 77, the historical name (G77) has been retained. The G77 countries conduct joint negotiations on issues of development, trade, and climate. G77 has less decision-making power than the G7 and G20, but it represents the voice of poorer, developing nations.

### SO WE CAN CONCLUDE THAT:

## G7

is a club  
of rich  
countries

## G20

is the real center  
of the global  
economy

## G77

is a collective  
voice of the  
Global South

\* Following Russia's annexation of Crimea and the outbreak of war in Donbas, **the other member states decided to suspend Russia's membership**, reverting to the G7 format. In June 2014, the G8 summit in Russia (in Sochi) did not take place; instead, a G7 summit (without Russia's participation) was held in Brussels. Russia was formally suspended on March 24, 2014.

## STRUCTURE

The G20 does not have a permanent secretariat. The chairperson, appointed for a one-year term on a rotating basis, establishes a temporary secretariat each time they take office. The country holding the G20 presidency in a given year sets the priorities and agenda, and organizes meetings and the summit. Thus, the host has significant impact on the topics discussed, but not on the decisions and outcomes.

The host of the meetings has the privilege to invite guests. The U.S. President Donald Trump has invited Poland to the upcoming summit (as well as Uzbekistan and Kazakhstan), and according to announcements by the U.S. administration, South Africa will not receive an invitation, even though it is a formal member of the G20<sup>5</sup>.

### **G20 AND THE EUROPEAN UNION** – DECISION-MAKING MECHANISM

Aspect	G20	UE
Law	non-binding	legally binding
Voting	none	majority/unanimity
Institutions	no permanent	Commission, Council, EP, CJEU
Enforcement	political pressure	sanctions, Regional Court
Scope	global	regional



GRAPHICS: NOWEMEDIA24.PL  
PIOTR PERZYŃA

As has already been mentioned, the G20 was established as a forum for finance ministers and central bank governors in 1999. Initially, the Group used to meet only at the finance ministers level. It was not until 2008 that in the wake of the global financial crisis regular summits of heads of state and governments began, which significantly increased the G20's importance.

Since 2008 (in response to the financial crisis), the meetings have transformed into summits with the participation of national leaders, thus broadening the scope of discussions. In 2024, meetings of foreign ministers were also initiated, making the G20 into a more than an economic but also a political Group.

<sup>5</sup> It should be noted that this would be the first in the history of the G20 and has already led to diplomatic tensions.

When discussing the history of G20 summits, let's focus on the last two years (and summits): the 2024 summit, when Brazil held the G20 presidency, and the 2025 summit, when it was South Africa.

## **THE G20 AGENDA UNDER THE PRESIDENCY OF BRAZIL (2024) AND SOUTH AFRICA (2025)**

### **1. INTRODUCTION AND POLITICAL CONTEXT**

The years 2024–2025 brought a significant shift in the focus of the G20's work, resulting from subsequent presidencies by two key countries of the Global South: Brazil and South Africa. Both presidencies were united in their desire to shift the focus from geopolitical conflicts (the war in Ukraine, the Middle East) to the fight against hunger, inequality, and the effects of climate change. This process was supported by the African Union's accession as a full member of the G20, which strengthened the voice of the world's poorest regions.

### **2. BRAZILIAN PRESIDENCY (2024) – SOCIAL JUSTICE AND FISCAL REFORM**

The administration of Luiz Inácio Lula da Silva focused on social justice and strengthening the role of developing countries in international institutions.

#### **Global Alliance Against Hunger and Poverty**

Brazil's flagship initiative, launched with the participation of over 140 entities (including 82 countries and international organizations). Its goal is to mobilize funds and share proven public policies to eliminate hunger by 2030.

#### **Taxation of the “ultra-wealthy”**

Brazil broke the taboo in the debate on fiscal justice by proposing a minimum global tax of 2% on the wealth held by billionaires. Although no specific rate was set in the final declaration due to resistance from the U.S. and Argentina, the sheer inclusion of a provision on cooperation in this area was considered a success.

#### **Global governance reform**

Leaders called for a profound reform of the UN (including the expansion of the Security Council to include countries from Africa and Latin America) and the Bretton Woods institutions (IMF, World Bank) to facilitate access to financing for the developing countries.

#### **Climate and ecology**

A task force on global mobilization to combat climate change (TF-CLIMA) and working groups on the bioeconomy have been established.

### 3. SOUTH AFRICAN PRESIDENCY (2025) – AFRICA AT THE CENTER OF GLOBAL GOVERNANCE

The Johannesburg Summit was a historic event since it was the first G20 summit held on the African continent.

President Cyril Ramaphosa continued Brazil's approach, emphasizing "solidarity, equality, and sustainable development".

#### Financial and Energy Support

Key achievement of the summit was an agreement on a new public debt restructuring framework for low-income countries. The Global Green Transition Fund was also established.

#### Initiatives for Africa

Programs such as "Mission 300" (connecting 300 million people in Africa to electricity by 2030), "Artificial Intelligence for Africa," and "Partnership for African Infrastructure."

#### Social objectives

Specific indicators were adopted, including the "Nelson Mandela Bay Target" (reducing the percentage of youth not in education, employment or training by 5% by 2030) and the Brisbane-eThekweni Goal to reduce the gender employment gap.

#### Critical minerals

The summit highlighted Africa's role as a supplier of raw materials essential for the production of clean technologies, promoting local processing and transparent supply chains.

### 4. CHALLENGES AND CONTROVERSIES

Despite progress on the socio-economic agenda, both presidencies grappled with deep political divisions.

**Geopolitical deadlock:** The declarations from Rio de Janeiro and Johannesburg lacked an unequivocal condemnation of Russia as the aggressor in Ukraine. Brazil and South Africa sought to use neutral language to maintain consensus, which disappointed some Western nations.

**Absences:** The summits were overshadowed by the absence of the heads of state of some member countries. In 2024, Vladimir Putin was absent from the Rio summit (due to an arrest warrant issued by the International Criminal Court). In 2025, the summit in Johannesburg was boycotted by the U.S. under the administration of Donald Trump, who rejected the agenda focused on climate and equality. Xi Jinping was also absent.

**Fiscal and climate disputes:** Developing countries accused the European Union of "green protectionism" due to the CO2 emission tariffs. They also criticized the vagueness of the provisions on peace and the lack of sufficient commitment for the complete debt write-off for the poorest nations.



## POLISH ROAD TO G20

On September 3, 2025, during meeting at the White House, the Polish President **Karol Nawrocki** received an invitation from U.S. President Donald Trump to attend the G20 summit, which will take place in December 2026 in Miami, Florida.

*“The Americans recognize that we are now fully qualified to begin the process of joining the G20.”*

**Marcin Przydacz**, head of the International Policy Office at the Chancellery of the President of the Republic of Poland.

In 2019, President **Andrzej Duda** participated in the main summit upon invitation from the Japanese Prime Minister Shinzō Abe.

In March 2017, Deputy Prime Minister **Mateusz Morawiecki** attended the G20 finance ministers’ meeting, becoming the first Polish representative in history to do so. Prime Minister **Beata Szydło** was also invited to attend the final summit.

*“As the President of the Republic of Poland, I do not intend to beat around the bush here - my country belongs to the G20.”*

*Lech Kaczyński*

President **Lech Kaczyński** during the meeting with the diplomatic corps, 2010

The G20 was established as a forum for finance ministers and central bank governors in 1999. It was not until 2008, following the global financial crisis, that regular summits of the heads of state and governments began, which significantly increased the G20’s importance.

- 2025 Johannesburg (South Africa)
- 2024 Rio de Janeiro (Brazil)
- 2023 New Delhi (India)
- 2022 Bali (Indonesia)
- 2021 Rome (Italy)
- 2020 Riyadh (Saudi Arabia)
- 2019 Osaka (Japan)
- 2018 Buenos Aires (Argentina)
- 2017 Hamburg (Germany)
- 2016 Hangzhou (China)
- 2015 Antalya (Türkiye)
- 2014 Brisbane (Australia)
- 2013 St. Petersburg (Russia)
- 2012 Los Cabos (Mexico)
- 2011 Cannes (France)
- 2010 Toronto (Canada)
- 2010 Seoul (South Korea)
- 2009 Pittsburgh (USA)
- 2009 London (UK)
- 2009 Washington (USA)
- 2008 São Paulo (Brazil)
- 2008 Cape Town (South Africa)
- 2007 Melbourne (Australia)
- 2006 Beijing (China)
- 2005 Berlin (Germany)
- 2004 Morelia (Mexico)
- 2003 Delhi (India)
- 2002 Ottawa (Canada)
- 2001 Montreal (Canada)
- 2000 Berlin (Germany)
- 1999

## 5. SUMMARY

The Brazilian and South African presidencies have cemented the G20's image as a forum where the voice of the Global South is heard and has a real impact. The success of the initiatives they have proposed, however, depends on whether political declarations are followed by specific financial contributions from the world's wealthiest economies. At the same time, boycotts and lack of cohesion on security issues point to a weakening of the G20's unity, which could deprive this forum (much like the UN) of its role as a guarantor of the world peace.

## WHAT THE G20 IS CRITICIZED FOR<sup>6</sup>

In the light of the above description of the last two summits, it is clear why the G20 may be – and is – criticized. This is important from the perspective of Poland's potential participation in this forum.

### **Lack of a formal legal basis and democratic legitimacy**

The primary focus of criticism directed at the G20 is that it lacks a formal legal basis. There are also no clearly defined procedures for handling various situations, which means that decisions on certain matters – such as whom to invite or not invite to a summit – are sometimes made unilaterally by a powerful host. The criteria for membership are also vague. There are no formal criteria, which leads to a situation where membership is determined by economic and political power rather than clear rules. One could say, to use a colloquial expression, that the G20 is governed by the law of the strongest, not by law itself. This lack of a legal basis can also be a source of tensions and conflicts (as in the case of the U.S. president's decision not to invite South Africa to the G20 summit).

### **Lack of transparency**

Lack of transparency is another major point of criticism. Decisions with global implications are made by a small group of countries, and they are taken "behind closed doors".

Decision-making processes are perceived as opaque to the public and driven by the elites, and the agenda is often dominated by the current political interests of the major powers rather than by the search for long-term solutions to global crises. This lack of transparency sparks protests, particularly from alter-globalization movements.

6 Compiled and categorized by A. Rymsza. See also:  
D. Wnukowski, *The Significance of the G20 in Shaping the Global Economic Governance System*, September 12, 2016, [https://pism.pl/publikacje/Znaczenie\\_G20\\_w\\_ksztaltowaniu\\_globalnego\\_systemu\\_zarzadzania\\_gospodarczego](https://pism.pl/publikacje/Znaczenie_G20_w_ksztaltowaniu_globalnego_systemu_zarzadzania_gospodarczego) [accessed: Jan. 14, 2026]; *G20 members undermining climate efforts, fossil fuel production subsidies surge to the highest levels ever in 2021*, press release, November 20, 2022, <https://www.climate-transparency.org/wp-content/uploads/2022/10/PressRelease.17.10.2022.pdf> [accessed: January 14, 2026]; *Improving G20 Effectiveness and Accountability*, [https://r20brasil.org/media/documentos/arquivos/TF06\\_ST\\_06Effe66fc0d379d921.pdf](https://r20brasil.org/media/documentos/arquivos/TF06_ST_06Effe66fc0d379d921.pdf) [accessed: January 14, 2026]; *Improving G20* Was the G20 Summit a Turning Point for the Global South?, August 14, 2023, <https://www.cfr.org/councilofcouncils/global-memo/was-the-g20-summit-a-turning-point-for-the-global-south> [accessed: February 8, 2026].

### **Lack of genuine representation and the dominance of the most powerful**

Another point of criticism regarding the G20 is that, although its members represent two-thirds of the world's population, there is a lack of genuine representation. The group consists of only 19 countries and two unions, yet its decisions affect the entire globe, which means the rest of the world has no real influence and must simply comply. In other words, the G20 is criticized for its elitist nature, which excludes the poorer regions of the world. The G20 is seen as a “club of the rich” that makes decisions of global significance without the participation of smaller countries.

Furthermore, there is no equality within the group itself. Although decisions are made consensually, in practice it is the U.S., China, and the EU that have the strongest impact, while weaker countries are forced to make compromises.

It should be noted, however, that the long-standing disregard for the voices of the developing countries, the so-called Global South, has been partially mitigated by the inclusion of the African Union in 2023.

### **“Double representation”**

Critics point to the glaring overrepresentation of Europe, or even double representation. They criticize the fact that although the EU is represented as a separate entity within the group and at every summit, its three members with the highest nominal GDP send their own delegations. And this only highlights the inequalities.

The situation is similar with the African Union and South Africa, but - given the already limited influence of the African countries - critics find it less glaring.

### **Decision paralysis and the vagueness of declarations**

Although the G20 counts relatively few members, it includes players with diverse and often conflicting interests, among whom political tensions have been rising in recent years (e.g., between the US, the EU, China, and Russia).

These tensions hinder, and sometimes even prevent, joint decision-making and the drafting of joint statements. This results in the content of final declarations being largely diluted in order to avoid veto by any member. Consequently, joint documents and declarations are often very vague. In the case of Russia's aggression against Ukraine, the joint declaration contained only a general and enigmatic call for peace. It is also hard to achieve accountability for the implementation of such generic decisions; it is hard to assess their actual impact.

The main sources of division are: armed conflicts (which have intensified following the Russian Federation's invasion of Ukraine), economic divisions (particularly regarding how and to what extent the developing countries

and those in crisis should be assisted), cooperation versus competition in trade, and climate change (whether it takes place at all, whether it results from human activity, and whether and how it can be counteracted). This low effectiveness, stemming from the vagueness of the declarations and resolutions adopted, is further exacerbated by the non-binding nature of these stipulations, as discussed below.

### **Low effectiveness due to the non-binding nature of decisions**

Last but not least, the G20 is criticized for the non-binding nature of the decisions taken at the summits. The final documents (communiqués) are purely declaratory and have no legally binding force. Member states implement the decisions on a voluntary basis, which often leads to a low level of actual implementation.

There are no legal mechanisms for enforcing the decisions, no sanctions, and implementation depends purely on the goodwill of the states.

This low effectiveness, stemming from the non-binding nature of G20's decisions, is particularly evident when dealing with major issues such as conflicts, wars, or climate change, where the emphasis is placed on a consensus and compromise rather than on concrete action—an approach that sometimes further dilutes criticism of the aggressive states.

As a result, the G20 is viewed more as a forum for informal discussions among world leaders than as an effective platform for addressing the most pressing global challenges.

In fact, a frequently cited example of the G20's ineffectiveness is its failure regarding the climate policy. Despite all declarations made at numerous G20 summits regarding the reduction of greenhouse gas emissions<sup>7</sup>, the G20 is still responsible for approximately 80% of global emissions. The group is therefore criticized for its failure to provide specific timelines for phasing out fossil fuels and for its continuation of subsidizing the coal and oil extraction<sup>8</sup>.

7 See G20 Leaders' Conclusions on Climate Change, 2008-10, Nov. 15, 2011, <https://www.g20.utoronto.ca/analysis/conclusions/climatechange-l.html> [accessed: Jan. 15, 2026].

8 P. Madhumita, G20 countries failed to present new 2035 targets by middle of COP30: Greenpeace, Nov. 21, 2025, <https://www.downtoearth.org.in/climate-change/g20-countries-failed-to-present-new-2035-targets-by-middle-of-cop30-greenpeace?utm> [accessed: 02/08/2026].



# WHY POLAND SHOULD BE IN THE G20

WHAT CAN IT OFFER TO THE WORLD,  
AND WHAT CAN THE G20 OFFER POLAND?



Dr Agnieszka Rymsza

## **POLAND'S ACCESSION TO THE G20 - LAUNCH OF DISCUSSIONS**

The question of Poland's membership in the G20 is not a new one. Even before the 2009 G20 summit in London, there were voices within the Polish government arguing that Poland should seek an invitation to participate in the London summit. One of the arguments was the lack of a representative from the Central and Eastern European region in the G20. There was also criticism of the fact that several European leaders speak on behalf of all of the EU countries without having any authorization to do so.

In 2010, during annual meeting with the diplomatic corps, President Lech Kaczyński expressed the view that Poland deserves a place among the G20 nations: "According to our calculations, the Polish economy ranks 18th in the world. I will not, and as President of the Republic of Poland I do not intend to beat around the bush—my country belongs to the G20 (...). This is a simple demand, first—based on the size of the Polish economy, and second—based on the fact that Poland is the largest country in a certain region and the largest country to have undergone a certain history, namely the history of transformation"<sup>9</sup>.

9 President: Poland's Place Is in the G20, February 2, 2010, <https://www.prezydent.pl/kancelaria/archiwum/archiwum--bronislawa-komorowskiego/news/events/president-poland-belongs-in-the-g20,13629,archive> [accessed: January 15, 2026].

In March 2017, the then-Deputy Prime Minister Mateusz Morawiecki attended the G20 finance ministers' meeting in Baden-Baden, Germany, as the first Polish representative ever to participate in such a summit<sup>10</sup>. Two weeks later, in April 2017, Krzysztof Szubert, the then Secretary of State at the Ministry of Digital Affairs and the government's plenipotentiary for the digital single market, attended the G20 Digital Ministers' meeting in Düsseldorf as the first Polish representative in this body<sup>11</sup> (and the second person in Polish history). It's worth noting that Poland was among the few non-member states invited to take part in the G20 Digital Ministers' meeting in Düsseldorf. The invitation of a representative of the Republic of Poland, which is not a member of the G20 (only indirectly – through its EU membership), to participate in these meetings was evidence of the recognition of our country's role and potential in the digital sphere. For Polish representatives, these were excellent opportunities to present Poland's perspective on digitalization issues at a prestigious forum, as well as to showcase existing achievements and plans in this area (including the creation of a dedicated Ministry of Digital Affairs, which comprehensively addresses digital transformation). Poland's permanent membership in the G20 would enable regular participation and provide Poland with the opportunity to showcase our achievements in the field of digitalization (and beyond).

To date, Poland has participated in two G20 summits as an invited country (2017 and 2019). In 2017, when Germany held the G20 presidency, Poland was invited by Angela Merkel to participate in the final summit as well. Prime Minister Beata Szydło attended the event<sup>12</sup>.

Two years later, on June 28–29, 2019, Poland participated in the main G20 summit again, this time upon invitation by the Japanese Prime Minister Shinzō Abe. Our country was represented at that time by President Andrzej Duda<sup>13</sup>.

For the subsequent few years, Poland was not invited to G20 summits, but on September 2, 2025, Polish Foreign Minister Radosław Sikorski announced that he had asked the U.S. authorities, who were holding the G20 presidency in 2026, to invite Poland to participate in the Group's deliberations, citing the fact that the value of the Polish economy had exceeded the \$1 trillion threshold<sup>14</sup>.

10 Poland keen to participate in G20 during Indonesia's presidency, October 12, 2021, <https://en.antaranews.com/news/193861/poland-keen-to-participate-in-g20-during-indonesias-presidency> [accessed: January 15, 2026].

11 Poland Participates for the First Time in the G20 Digital Ministers' Meeting, April 7, 2017, <https://www.gov.pl/web/cyfrizacja/polska-po-raz-pierwszy-uczestnikiem-spotkania-ministrow-ds.-cyfrowych-grupy-g20> [accessed: January 15, 2026].

12 Prime Minister Beata Szydło at the G20 Summit in Hamburg, Press Release from the Chancellery of the Prime Minister, July 6, 2017.

13 The President of Poland at the G20 Summit in Osaka, Prezydent.pl, 2019.

14 P. Kozłowski, Poland in the G20 in 2026? Sikorski Seeks an Invitation from the U.S., September 2, 2025, <https://wiadomosci.dziennik.pl/polityka/artykuly/9877080,polska-w-g20-w-2026-roku-sikorski-zabiega-o-zaproszenie-od-usa.html> [accessed: Jan. 15, 2026]. It is worth noting that, as Radosław Sikorski claimed, he made this request to the U.S. Secretary of State in Miami, where he met with Marco Rubio in his hometown, in his congressional district, on the occasion of presenting the Lech Wałęsa Solidarity Award to Berta Soler, a Cuban dissident still residing in Cuba.

## INVITATION FROM DONALD TRUMP

On September 3, 2025, the Polish President Karol Nawrocki, following a meeting with the U.S. President at the White House, announced to the public that he had received an invitation from U.S. President Donald Trump to attend the G20 summit, which will take place in December 2026 in Miami, Florida. “I would like to share a piece of joyful news. I have received an invitation from President Donald Trump to the next year’s G20 summit, which will take place in Miami, Florida (...) I consider this news to be of great importance to the Polish public. We have succeeded in confirming the significant role played by the Polish president on the international stage, particularly in the United States,” the Polish President Karol Nawrocki<sup>15</sup> noted.

“Thanks to President Trump’s invitation of President Nawrocki to attend the G20 summit, Poland is embarking on its journey to join this highly prestigious group of the world’s twenty largest and most developed economies,” said Minister Marcin Przydacz, head of the International Policy Office at the Chancellery of the President of the Republic of Poland, at a press conference. “The Americans recognize that we are now fully qualified to begin the process of joining the G20,” he added<sup>16</sup>.

Two days later, on September 5, 2025, the U.S. President Donald Trump himself announced that he had sent an invitation to Poland to attend the summit of the world’s 20 most influential nations – the G20 summit. It will take place in 2026 in Miami, Florida. “We’ll invite other countries as observers. They call them observers, but they’ll have a say. But I’ve already invited Poland; I sent them an invitation. It’s great that they were here; as you know, their wonderful new leader was here,” Trump said, referring to Karol Nawrocki’s visit to Washington<sup>17</sup>.

15 Nawrocki: *I received an invitation from Donald Trump to the G20 summit*, September 3, 2025, <https://tvn24.pl/biznes/z-kraju/karol-nawrocki-dostalem-zaproszenie-od-donalda-trumpa-na-szczyt-g20-st8630502> [accessed: Jan. 15, 2026].

16 Ibid.

17 Donald Trump: *I invited Poland to the G20 summit. We will also invite other countries as observers*, September 5, 2025, <https://tvn24.pl/swiat/donald-trump-zaprosilem-polske-na-szczyt-g20-zaprosimy-tez-inne-kraje-jako-obszernikow-st8634713> [accessed: 02/17/2026].

### **Karol Nawrocki on Poland in Group 20 at the UN forum**

Poland's presence in the G20 was one of the topics raised by President Karol Nawrocki during the debate at the UN General Assembly on September 23–24, 2025. As he wrote on September 24 on X: "Poland is the world's 20th-largest economy. We are consistently seeking to participate in the work of the G20 (...) Poland, a co-founder of the United Nations, is the world's 20th-largest economy and a country that, over the past 30 years, has successfully transformed itself from a developing country into a developed one and from a centrally planned economy into a market economy (...) Given our potential and experience, we consistently seek to participate in the work of the G20—a forum that serves as a bridge in these turbulent times", the president stated. He also thanked U.S. President Donald Trump for the invitation to participate in the next G20 summit.

### **U.S. Secretary of State on Poland at the G20**

U.S. Secretary of State Marco Rubio also addressed Poland's role in the G20 in a statement issued in early December 2025. "For the first time since 2009, the United States will host the world's 20 largest economies next year (...) The 2026 G20 Summit will be an opportunity to celebrate the values of innovation, entrepreneurship, and perseverance that have made America great and that chart a path to prosperity for the entire world. (...) We will invite friends, neighbors, and partners to the American G20 Summit. At the American table, we will welcome the world's largest economies, as well as emerging partners and allies. In particular, Poland—a country that was once trapped behind the Iron Curtain and is now among the world's 20 largest economies—will join us to take its rightful place in the G20"<sup>18</sup>.

Preparations for next year's G20 summit in Florida prompted the visit of Marcin Przydacz, head of the International Policy Office at the Chancellery of the President of the Republic of Poland, and a representative of the Ministry of Foreign Affairs to Washington in December 2025 (it is Marcin Przydacz who is expected to take the lead on the Polish side).

However, it is important to keep in mind G20 is governed by the principle of consensus, meaning that Poland will only join the G20 provided there is no opposition from any other members of the Group.

18 K. Kalus, Rubio confirms. "Poland will join us at the G20," Dec. 4, 2025, <https://www.money.pl/gospodarka/rubio--potwierdza-polska-dolaczy-do-nas-na-g20-7228719830387616a.html#> [accessed: Feb. 16, 2026].

*“At the American table, we will welcome the world’s largest economies, as well as our developing partners and allies.*

*In particular, **Poland**, a country that (...) is currently among the world’s 20 largest economies, **will join us to take its rightful place in the G20.**”*



**Marco Rubio**  
U.S. Secretary of State



On September 18, 2025, the Chinese Ministry of Foreign Affairs officially confirmed its readiness to discuss inclusion of new members into the Group. “China is ‘open’ to discussing the admission of new members to the G20,” stated a spokesperson for the Chinese Ministry of Foreign Affairs in response to a question from the Polish Press Agency regarding reports on Wang Yi’s, the Chinese Foreign Minister’s, declaration concerning Poland made during his visit to the country<sup>19</sup>.

Thus, Poland, as an aspiring member of the Group, has received official support from the world’s two largest powers.

The Miami Summit is coming up. It will be held on December 14–15, 2026, at the Trump National Doral resort. Working group meetings will be taking place through October. Finance ministers and central bank governors will meet on August 31–September 1, and finance ministers will meet on October 15 (additionally). Donald Trump has announced three priorities for the G20 Summit in Miami: reducing regulatory barriers, supply chain security, and technological innovation.

It is worth ensuring that Poland is properly prepared for this summit.

<sup>19</sup> K. Pawliszak, Will Poland Join the G20? China’s Position, September 18, 2025, <https://www.pap.pl/aktualnosc/czy-polska-dolaczy-do-grupy-g20-msz-chin-jestesmy-otwarci-na-dyskusje> [accessed: 02/16/2026].

## WHAT SHOULD POLAND FOCUS ON REGARDING ITS G20 MEMBERSHIP:

- 1. Contributing to the G20 initiative through development of its own projects,** including initiatives concerning the region that has not yet been represented in the G20.
- 2. Presenting Poland's perspective and views** on international relations and global finance.
- 3. Developing cooperation with close partners in the U.S. and Europe,** as well as establishing relationships with G20 members from other continents.
- 4. Prestige and image.**
- 5. Developmental boost for Poland in domestic politics** as one of the world's 20 largest economies.
- 6. A contribution to the initiative interesting and original enough to ensure – should the hosts of the future summits (e.g., the United Kingdom, South Korea) so desire — participation in the subsequent G20 summits and, ultimately, application for the permanent G20 membership.**

It is also worth noting that, in addition to Poland and following direct talks with the leaders of both countries, Donald Trump also invited Kazakhstan and Uzbekistan to participate in the G20 summit in Miami in September 2026.

According to Maciej Dachowski of the Casimir Pulaski Foundation and an expert at the Sobieski Institute, Donald Trump, in addition to economic potential and political credibility, may also be driven by any given country's strategic utility.

“After all, both countries play a crucial role for the network of Eurasian transportation links, transit of energy resources, and access to critical raw materials. They also play an increasingly important role for the geopolitical balance in the region stretching from East Asia to Europe”<sup>20</sup>.

20 See M. Dachowski, “G20, Poland, and Central Asia: What Does the Invitation to Miami Really Mean?”, January 8, 2026, <https://pulaski.pl/g20-polska-i-azja-srodkowa-co-naprawde-oznacza-zaproszenie-do-miami/> [accessed January 13, 2026].

Given the growing importance of routes that connect China with Europe and that bypass Russia, as well as the growing significance of linking raw material extraction areas with industrial markets amid strategic uncertainty, and offering alternatives

where, until now, solutions based on a single route and a single supplier had prevailed, diversification of access to raw materials has for the U.S. ceased to be a matter of economic efficiency and become a strategic imperative.

By placing Central Asia at the heart of the debates on the resilience of critical raw material supply chains, the U.S. and other Western countries can enhance their energy security<sup>21</sup>.

Inviting Uzbekistan and Kazakhstan to the G20 is also an attempt to limit Russian influence in Central Asia (Russia continues to treat Central Asia as an area of their key interests), to open the door to a greater autonomy for all states in the region as well as to a more multi-vector foreign policy for these countries<sup>22</sup>.

We discuss cooperation with Central Asian countries in the context of the G20 summit in Miami in the next chapter—*“Poland in the G20: The Doctrine of Middle Power Effectiveness, 2025–2030”*

## THE MOST IMPORTANT ARGUMENTS FOR POLAND JOINING THE G20. WHAT POLAND CAN OFFER THE WORLD AS A G20 MEMBER

### 1. ECONOMIC SIGNIFICANCE

Polish economy is one of the largest in Central and Eastern Europe. Moreover, according to forecasts and estimates by the International Monetary Fund, Polish economy has not only become the 20th largest economy in the world but it will also hold this position at least until the end of this decade<sup>23</sup>.

The update to the International Monetary Fund’s database from October 2025 shows that Poland’s gross domestic product (GDP) in 2025 will amount to \$1.04 trillion. This result would place Poland as 20<sup>th</sup> in the world and make it the last member of the unofficial “trillion-dollar club”<sup>24</sup>, behind Saudi Arabia and just ahead of Switzerland, which, according to the IMF data, Poland managed to outperform in 2025.

21 Ibid.

22 Ibid.

23 K. Kolany, IMF: *Poland is the world’s 20th-largest economy. And it will remain so for some time*, November 17, 2025, <https://www.bankier.pl/wiadomosc/MFW-Polska-jest-20-gospodarka-swiata-l-jeszcze-przez-jakis-czas-nia-pozostanie-9038229.html> [accessed Jan. 5, 2026].

24 Prime Minister: *Poland has joined the ranks of trillion-dollar economies*, September 2, 2025, <https://www.bankier.pl/wiadomosc/Premier-Poland-has-joined-the-club-of-trillion-dollar-economies-9002254.html> [accessed: 1/15/2026].



1. The United States  
31 821

European Union  
22 515

# 20 LARGEST ECONOMIES IN THE WORLD IN 2026

IN BILLIONS OF USD

Stable economic growth over many years has increased Poland's credibility on the international stage. **Poland is a country developing quickly.**

The update to the International Monetary Fund's database from October 2025 shows that Poland's gross domestic product (GDP) in 2025 will amount to **\$ 1.04 trillion**

**This result would place Poland on the 20th position in the world and make it the last member of the unofficial "trillion-dollar club",** just behind Saudi Arabia and just ahead of Switzerland, which, according to the IMF's data, **Poland managed to outperform in 2025.**

Poland's GDP has also surpassed GDPs of two other G20 countries: Argentina's and South Africa's.



2. China  
20 651

3. Germany 5 328

4. Japan 4 464

5. India 4 506

6. Great Britain 4 226

7. France 3 559

8. Italy 2 702

9. Russia 2 509

10. Canada 2 421

11. Brazil 2 293

12. Spain 2 042

13. Mexico 2 031

14. South Korea 1 937

15. Australia 1 948

16. Türkiye 1 576

17. Indonesia 1 550

18. Netherlands 1 413

19. Saudi Arabia 1 316

**20. Poland 1 110**

are not members of the G20

Since GDP has always been one of the main criteria for participation in the forum, Poland should be part of the G20 as one of the world's twenty richest countries in terms of GDP.

Furthermore, years of steady economic growth have enhanced Poland's credibility on the international stage. Poland is a quickly developing country (had it not been so devastated by World War II, today it would be much more developed – even if raising this issue is seen as confrontational towards Germany, much like the question of war reparations). Moreover, Poland has already surpassed two G20 countries in terms of their GDP size: Argentina and South Africa.

## 2. REPRESENTING THE REGION

Even if exchange rate fluctuations should see Poland drop to 21st place in terms of GDP<sup>25</sup>, another argument in favor of Poland's membership in the G20 is the fact that Central and Eastern Europe is not represented in the G20; not a single country from this part of Europe is a G20 member. Poland, as the largest and wealthiest country in Central and Eastern Europe, could become the voice of the region. Poland's presence in the G20 would increase this part of Europe's impact on decisions of global reach.

It must also be noted that in terms of population and territory, Poland is not only the largest country in Central and Eastern Europe; it is also one of the largest countries in the EU.

Central and Eastern Europe is characterized by rapid economic growth, social stability, and rising domestic consumption. Poland's membership in the G20 can help promote these assets on the international stage, highlighting that the region is a stable, predictable, and profitable destination for capital investment<sup>26</sup>.

25 GDP is measured in the national currency (PLN) and then converted into U.S. dollars to compare it with other countries. This is where the risk of "false" changes arises: 1. The exchange rate of the zloty against the dollar changes daily. If the zloty strengthens, the GDP value in USD will be lower after conversion, even if GDP in zlotys is growing. 2. A weakening of the zloty artificially raises the GDP value in dollars. Therefore, Poland may rise or fall in the global ranking not because of a change in real economic output, but because of a change in the USD/PLN exchange rate, which is used to convert GDP values into the common currency. Depending on the exchange rate, Poland may be the 20th or 21st largest economy in the world. See: Expert: *Dollar exchange rate is the deciding factor in whether Poland will be the world's 20th-largest economy*, July 7, 2025, <https://www.pb.pl/ekspert-kurs--dolara-czynnikiem-decydujacy-m-o-tym-czy-polska-bedzie-20-gospodarka-swiata-1244716> [accessed: 02/17/2026]. On the other hand, differences in the rankings may also stem from the varying measurement methods used by different international financial institutions. The key issue is whether nominal GDP—converted into dollars—is used, or whether purchasing power parity (PPP) is taken into account, i.e., the purchasing power of money (and price differences between countries). Using the first method, Poland could even rank 19th. See A. Kasprzyk, *Poland's GDP in a Global Context: How Our Economy Is Performing*, May 22, 2025, <https://biznes.interia.pl/gospodarka/news-pkb-polski-na-tle-swiata-tak-radzi-sobie-nasza-gospodarka%2Cnld%2C7969425> [accessed: Feb. 17, 2026]. According to IMF projections, however, in 2026 Poland will have the highest budget deficit in the entire European Union, amounting to 6.7% of GDP. Purchasing power parity remains a problem. The IMF report addresses the issue raised by Piotr Kuczyński. In terms of GDP per capita based on purchasing power parity, Poland ranks 41st out of 191 countries surveyed. R. Kędzierski, "Have You Felt It? Poland Is Officially the World's 20th Largest Economy." Expert: *More like 41st*, Oct. 18, 2025, <https://www.money.pl/gospodarka/poczules-to-polska-oficjalnie-stala-sie-20-gospodarka-swiata-ekspert-bardziej-41-7211797873581024a.html> [accessed: 02/16/2026]; See also: A. Surdej, D. Mongiati, *The Functioning and Future of the G20 in the Era of Geopolitical Tensions at the Beginning of the 21st Century*.

26 See Recommendations: Ideas for Poland.

### 3. POLAND'S UNIQUE EXPERIENCE

Polish experience - related to initiating political transformation in the region, building energy security and shaping relations with Russia throughout the country's history - is unique on a global scale. It differs from the experience of the Western European countries, not to mention the rest of the world.

Under these circumstances, Poland can play a greater role than its formal institutional weight would suggest. It is not about competing with the European Union, but about the opportunity to complement its capabilities where speed, flexibility, and experience in operating under pressure are needed. Poland, largely unburdened by the massive scope of regulations governing operations of the EU institutions, is faster and more flexible than the European Union as a whole.

It can make a significant contribution to the G20 meetings by sharing its positive experience with regards to socio-economic development and a whole range of projects related to the energy transition.

Polish experiences acquired since 2022 –related to the energy crisis, increased security risks, and the need for rapid restructuring of trade and logistics – show just how much the actual conditions under which European countries operate have changed, and how well Poland is coping with this shift.

Our country should showcase its experience related to economic transformation as well as its professionalism in the manufacturing and service industries. These should be the hallmarks of Polish entrepreneurs on the foreign markets.

### 4. SECURITY AND GEOPOLITICS

Due to its geographical location, Poland has been playing an increasingly significant role on the world stage in recent years, not only economically but also in terms of security. Poland understands –better than almost any other country –the imperial culture of its powerful neighbor, having born its brunt in various forms throughout most of its history. Following Russia's invasion of Ukraine, Poland has become the EU member state directly bordering the territories where the war is being waged (Ukraine, Russia). In this context, our experience is an important input to discussions on international stability, sanctions, and energy security.

### 5. INTERNATIONAL ACTIVITY

Global significance of our country's international activity has also been growing. Poland is member of a number of international organizations (the EU, NATO, the OECD), and in recent years has been actively involved in a range of global and regional economic and political initiatives, strengthening its position within Euro-Atlantic structures and on the international stage.

#### ● The European Union and economic policy

As an EU member, Poland takes active part in shaping the EU's common trade, climate, and budget policies, including the implementation of the NextGenerationEU program. It is also engaged in the debate on fiscal reforms, energy security, and EU enlargement to include the Western Balkans and Ukraine.

- **Support for Ukraine and security initiatives**

Poland has become one of the main supporters of Ukraine, providing political, military, and humanitarian assistance to the country following Russia's invasion. Poland is active within NATO, including its involvement in the efforts to strengthen the Alliance's eastern flank and increase defense spending. Most of the aid for Ukraine passes through our country. Poland is a participant of initiatives for Ukraine's reconstruction and international donor conferences as well.

- **Three Seas Initiative**

Poland is one of the leaders of the Three Seas Initiative, a project involving Central and Eastern European countries aimed at developing energy, transport, and digital infrastructure along the North-South axis of the region.

- **Regional cooperation**

Poland actively participates in the works of the Visegrád Group and the Bucharest Five, focusing on coordination of national positions on security issues and policy toward Russia.

- **Global Organizations**

Poland is also active within the United Nations, including on issues of human rights, international security, and sustainable development (Agenda 2030). In the past, it served as a non-permanent member of the UN Security Council (2018–2019), which strengthened its diplomatic role.

- **Climate and energy transition**

Poland participates in the global climate negotiations under the United Nations Framework Convention on Climate Change and meets its obligations under the Paris Agreement, while seeking to ensure that the specific circumstances of countries with coal-based economies are taken into account.

In recent years, Poland has focused on strengthening security, regional integration, energy diversification, and its active presence in the Western institutions, seeking to align regional interests with participation in the global governance system.

## **6. ECONOMIC INNOVATION**

Poland can contribute to the G20's activities in the field of digitalization (indeed, as an expert in this very field, it has already been invited to the Group's working meetings). It has developed cloud-based security systems and continues to deliver e-government and e-health programs. Poland has also developed a joint cybersecurity cooperation program with various partners, such as the European Union and NATO (North Atlantic Treaty Organization).

Poland can also contribute to strengthening cooperation related to taxation. It was Poland who initiated mechanisms that support international cooperation to fight against the tax fraud. It has also played an active role in addressing issues related to money laundering and the financing of terrorist groups.

## POTENTIAL ARGUMENTS AGAINST POLAND'S MEMBERSHIP IN THE G20 AND COUNTERARGUMENTS

While discussing Poland's membership in the G20, apart from presenting arguments in favor of our country's participation in this forum, it is also worth preparing responses to potential objections and counterarguments. Below we present the most important ones.

### 1. "POLAND IS NOT ECONOMICALLY STRONG ENOUGH." THE G20 COUNTRIES HAVE A GLOBAL FINANCIAL INFLUENCE THAT POLAND HAS NOT YET ACHIEVED.

#### COUNTERARGUMENT

According to IMF forecasts, Poland is not only one of the fastest-growing economies in the EU and a leader in Central and Eastern Europe, but it also ranks 20th on the list of the world's richest countries in terms of GDP. Its potential for further growth and real regional influence is significant. Its political role, especially regarding security (NATO's eastern flank), must not be underestimated. Moreover, there are countries (such as Argentina and South Africa) that are members of the G20, even though they are poorer than Poland.

At present, the economy is not the sole criterion for membership (though Poland meets it). Politics (especially since 2024) and strategic location also play a role. As already mentioned, the invitation of Kazakhstan and Uzbekistan to this year's G20 summit in Miami, is not merely symbolic. After all, both countries occupy a key position in the network of Eurasian transportation links, in the transit of energy resources, and in access to critical raw materials. They also play an increasingly important role in the geopolitical balance across the region stretching from East Asia to Europe. Neither Kazakhstan nor Uzbekistan are economic powers in terms of GDP. The presence of these countries in the G20 may be instrumental or strategic in nature, given the interests of the U.S. or, more broadly, the Western world.

As of today, the G20 is shifting away from its role as a forum that merely affirms the status of nations in a purely economic context; instead, it is gearing towards serving as a mechanism for selection of actors of systemic importance. The way in which the United States draws the list of invited guests suggests a transition away from focusing on formal membership to more functional criteria: economic potential, political credibility, and strategic utility in an increasingly polarized international environment<sup>27</sup>.

27 See M. Dachowski, "G20, Poland, and Central Asia: What Does an Invitation to Miami Really Mean?", January 8, 2026, <https://pulaski.pl/g20-polska-i-azja-srodkowa-co-naprawde-oznacza-zaproszenie-do-miami/> [accessed February 12, 2026].

What matters here is not the invitation itself, but the fact that the invitations are being issued simultaneously. This signals that, in global politics, the role of formal status is diminishing, while the importance of countries that make a real contribution to the stability and functioning of the system is growing<sup>28</sup>.

In this context, the G20 summit in Miami should be regarded not as the culmination of a diplomatic process, but as a decision point. The presence of Kazakhstan and Uzbekistan at the G20 table confirms that Central Asia is no longer a playground for external interests but is becoming a party to discussions on the direction of global economic and security policy. Poland's invitation follows the same logic, with an expectation of not merely symbolic presence but of a real contribution<sup>29</sup>.

**2. “THE EU ALREADY REPRESENTS POLAND” – THE EU IS A FULL MEMBER OF THE G20. POLAND ALREADY IS AN INDIRECT PARTICIPANT IN THE DECISION-MAKING VIA THE EU INSTITUTIONS, SO SEPARATE MEMBERSHIP WOULD JUST REPLICATE THIS REPRESENTATION.**

**COUNTERARGUMENT**

Poland being represented in the G20 via the EU can not replace its national or even regional voice. The interests of Western Europe often differ from those of Central and Eastern Europe (including Poland), which is why Poland's direct presence would enhance pluralism within the G20 and give this part of Europe a real voice. Moreover, some other EU members – specifically from Western Europe (Germany, France, Italy) and who, at that, have a strong voice within the EU, are also members of the G20.

“Europe still often assumes that its international standing stems from the sheer existence of its institutions, procedures, and joint declarations. Meanwhile, in many regions of the world, a country's true significance today is defined first of all by its ability to be effective in crisis situations: to ensure security, maintain key trade routes, and secure access to strategic raw materials. Where effectiveness matters more than formal membership, the traditional European mindset is more and more often proving to be insufficient”<sup>30</sup>.

As already mentioned, Poland acts in a faster and more flexible manner than the EU, rigid and burdened with its regulations and procedures.

28 See M. Dachowski, *G20, Poland, and Central Asia*.

29 Ibid.

30 Ibid.

**3. "POLAND IS NOT A SUPERPOWER AND HAS NO GLOBAL POLITICAL OR MILITARY SIGNIFICANCE."**

**COUNTERARGUMENT**

A country's military might is not the only thing defining its significance. Poland benefits from its strategic location, experience of political transformation, and an important role it plays in European security, which is of global significance.

Since Donald Trump is inviting Poland to the G20 summit, he recognizes that Poland matters. The invitation follows the same logic – the logic that expects real contribution and not just a symbolic presence.

For Poland, this means the need to redefine the nature of its international presence: from a status-based recognition, expressed through an invitation to a prestigious forum, to real responsibility stemming from co-shaping the decisions and contributing to the stability of the system. In other words, membership will provide a boost to Poland's global political and military significance.

**4. "POLAND'S VOICE WOULD BE MARGINAL IN THE FORUM." POLAND'S VOICE RISKS BEING MARGINALIZED AMONG THE MAJOR POWERS. POLAND AS A LISTENER, NOT AN ACTOR.**

**COUNTERARGUMENT**

The argument that Poland's voice might barely be heard in the G20 - due to Poland's limited political influence and the greater role that the major players (the U.S., China, the EU) with a global rather than regional reach play in shaping the agenda - can be countered with an observation that even smaller countries in the G20 can form coalitions and actively impact its agenda. Presence in the forum opens the opportunity to participate in the decision-making, while lack of membership translates into no impact at all. It is better to have less influence than none whatsoever. So the argument stands, as in the previous point: Poland's membership in the G20 will make Poland's voice carry more weight.

Furthermore, since the group includes countries with comparable potential, Poland could also be invited to join. It should also be kept in mind that declarations and statements at G20 summits must be adopted unanimously.

**5. POLAND'S PRIMARY FOCUS IS ON SECURITY AND REGIONAL DEVELOPMENT.**

Since global decisions are often shaped by the major players (the U.S., China, Russia, the EU), some argue that Poland - which is not a major power anyway - focuses and should focus on security and regional development (the EU, NATO, Eastern Europe).

**COUNTERARGUMENT**

Participation in the G20 does not preclude regional engagement. Quite the contrary—it allows for better representation of the region's interests at the global level.

**6. “MEMBERSHIP WOULD BE COSTLY.” POLAND WOULD HAVE TO COMMIT SIGNIFICANT RESOURCES TO GLOBAL-SCALE ACTIVITIES.**

Costs (mainly informal):

- **organizational:** member states (or the country holding the presidency in any given year) bear the costs of organizing meetings, summits, and numerous working groups;
- **diplomatic and administrative:** presence in G20 requires the involvement of diplomats, experts, and other staff to draft materials, participate in negotiations, and implement agreements;
- **political commitments:** participation requires a willingness to act in a spirit of cooperation and to implement agreements, which can be costly in the context of national politics.

**COUNTERARGUMENT**

These are mainly **informal** and indirect costs (such as diplomatic engagement and the organization of summits) as well as commitments to cooperate on global economic issues. There are no fixed membership fees, as the G20 does not have a permanent administration or budget, unlike, for example, the UN. Above all, the diplomatic costs are minor compared to the potential benefits, such as impact on global economic decisions, investments, and international prestige.

**7. “THE CLOSED NATURE OF THE G20.” THE G20 WAS ESTABLISHED IN 1999 AS A GROUP OF 20 COUNTRIES, AS REFLECTED IN ITS NAME, AND THERE IS NO FORMAL ADMISSION PROCEDURE FOR NEW MEMBERS. SINCE ITS INCEPTION, NO NEW COUNTRIES HAVE BEEN ADMITTED TO THE GROUP, DESPITE POLITICAL AND ECONOMIC SHIFTS ON THE GLOBAL STAGE.**

**COUNTERARGUMENT**

First, absence of a formal admission procedure does not imply that no admissions are possible. There is no procedure for admission of new countries, but there are also no documents indicating it is forbidden.

What’s more, even if no individual countries have been admitted to the Group from the start, the entire African Union was. So it is possible. The G20 is therefore not closed. There already exists an established precedent for expansion.

The Group already has 21 members including the EU and the African Union (19 countries and two supranational/regional organizations).

Another organization of this type (e.g., the G6) was expanded in 1973 to include Canada, forming the G7 (1975). (From 1997 to 2014, Russia was also a member making G7 into G8, but Russia was excluded following its aggression against Ukraine).

**8. EXPANSION OF THE GROUP WOULD INSPIRE OTHER COUNTRIES TO FOLLOW POLAND'S LEAD, WHICH WOULD CONSEQUENTLY WEAKEN THE GROUP'S EFFECTIVENESS AND ITS ABILITY TO MAKE QUICK DECISIONS.**

**COUNTERARGUMENT**

Firstly, the question arises as to whether other countries have as much to offer as Poland, and whether there are as many arguments in favor of their membership.

Secondly, admission of new countries from regions underrepresented in the G20 would be an effective response to criticism that G20 is an unrepresentative group. It must be kept in mind that, in addition to Poland, Kazakhstan and Uzbekistan were also invited to the Miami summit.

It is true that one can imagine the replacement of one member with another (and such voices have already been heard). But joining the G20 in place of another country would be politically risky (it would damage Poland's relations with the removed countries). Moreover, if decisions at summits are to be made unanimously, it is hard to fathom a situation where any country would vote for its own removal from the Group.

## **WHAT WOULD G20 MEMBERSHIP OFFER POLAND?**

**1. PRESTIGE**

For Poland, membership in the G20 would be a matter of significant prestige. It would mean Poland has been widely recognized as one of the world's key economies and a permanent participant in the most important forum for economic policy coordination. Membership would boost Poland's international standing, increasing its impact on global decisions regarding finance, trade, energy security, and climate transition.

**2. GREATER GLOBAL TRUST IN OUR COUNTRY, BOTH POLITICALLY AND ECONOMICALLY**

Poland's membership in the G20 would translate into a greater global trust towards our country, both politically and economically since it would be seen as a country of global significance.

Poland should now actively promote its role as a new, reliable business partner in non-European markets, combining the national interest with the need to respond to evolving global challenges, including in strategic sectors such as critical raw materials, defense, and energy transition. Nonetheless, the membership in the G20 alone would bear witness to Poland having earned the trust of countries belonging to this forum.

When you consider security in a broader sense than just sheer military might, it is worth noting that earning and maintaining trust of both the leaders of major world powers and of smaller states is crucial to ensuring security and building resilience.

### **3. G20 AS AN INSTRUMENT FOR DEVELOPMENT AND A SPRINGBOARD FOR PROMOTING POLAND IN NON-EUROPEAN MARKETS, INCLUDING THE GLOBAL SOUTH**

These markets still account for a very small share of Polish exports, and the economic slowdown in the European Union and other Western markets, combined with the rapid development and growing affluence of the middle class in India, ASEAN, and more broadly, in the non-European world, necessitate an increase in Poland's activity in these regions.

Poland's "economic miracle" needs further breakthrough measures. The prospect—or perhaps already the reality—of an economic slowdown in Europe, combined with the war in Ukraine raging on our Eastern border and driving away foreign investment, along with the increase in energy prices and all other costs in Poland, is forcing Poland to seek new markets for its services and products on a global scale.

Diversification of export markets, cooperation with European (Germany) and Asian markets is required, so are the preparations for a strategic entry into the African continent - a region with an enormous market potential and rich in mineral resources. Cooperation should encompass both direct engagement with national governments and partnerships with local contractors operating under the EPC model.

A stronger Polish presence in the markets of the G20 countries—including African nations participating in the forum's work—would create opportunities for Poland to expand its economic reach<sup>31</sup>.

It is important to increase the value of Polish investments in the African raw material markets, particularly in the critical and strategic metals, which are essential for the functioning of a modern economy. Promoting technology transfer coupled with *know-how* is particularly important for the metallurgical and smelting sectors, including the implementation of the modern ESG standards and transparent production processes. Poland should support innovative solutions applied to monitor and certify raw materials, such as *blockchain* technologies, in order to enhance the transparency and security of the supply chain. Priority should lie with investing in countries such as Rwanda, who displays a steady economic growth, developed digital infrastructure, and a favorable investment climate, thereby minimizing risks and increasing project efficiency.

Luma Holding may be a good example. At the Sobieski Institute's conference *Ideas for Poland* in the fall of 2025, Krzysztof Matan, member of the company's management board, spoke about Polish investments into the metallurgical and raw materials sectors in Africa, particularly in Rwanda.

<sup>31</sup> For more information, see the Appendix to this report: Recommendations of the "Ideas for Poland 2025" Forum.

He cited them as an example of a strategic approach to securing raw materials critical to a modern economy. Such initiatives demonstrate the potential for cooperation between Poland and African markets in strategic raw materials sectors<sup>32</sup>. Participation in the G20 would facilitate Poland's development of economic cooperation with African countries.

It is necessary to define Poland's strategic economic interests and the competitive advantages of industries where the potential for success for Polish companies is the greatest. Contacts related to G20 membership could open further opportunities for Poland's integration into international supply chains.

#### **4. GREATER ACCESS TO THE EXPERIENCE AND KNOW-HOW POSSESSED BY OTHER COUNTRIES**

Poland's membership in the G20 would significantly enhance access to the experience, expertise, and proven solutions developed by the world's largest economies. Participation in working groups and direct dialogue with the leaders of countries that are at the top of technological and institutional development would facilitate the transfer of *know-how* in areas such as energy transition, digitalization, financial stability, and climate policy. Poland could benefit from best practices related to crisis management, innovation, and structural reforms, which would enhance the effectiveness of domestic public policies. (At the same time, active participation in the G20 would allow Poland to help shape global standards, rather than merely adapt to the already adopted solutions.)

#### **5. ACCESS TO HIGH-LEVEL DISCUSSIONS AND IMPACT ON THE SHAPE OF THE GLOBAL FINANCIAL POLICY**

Membership in the G20 would give Poland access to high-level discussions and impact on the shape of the global financial policy. Participation in the G20 allows Poland to have influence not only on the regional policy but, above all, on the global policy. Without any doubt, it is a significant step. Poland has already reached this stage of development where we should shift our approach away from following an imitative model to actively shaping the reality. Membership in the G20, which provides for the ability to participate in the process of shaping the global financial and economic policy, as well as of the related political sphere, would, in a sense, compel Poland to do exactly that.

32 We publish the recommendations from the Sobieski Institute's "Ideas for Poland" Forum at the end of the report (see Appendix).

Some critics view the G20<sup>33</sup> as lacking influence or indecisive; they also question the value of international forums in general, given their large and growing number, and the fact that in many cases (as the COVID-19 pandemic has shown) individual countries ultimately have to rely mainly on themselves. Still, it is better to be part of a global forum than not to be. Put simply, it is worth being at the table with the world's richest economies.

## **6. OPPORTUNITIES FOR BILATERAL TALKS AND OTHER IMPORTANT MEETINGS ON THE SIDELINES OF SUMMITS**

Participation in the working groups and then in the summit itself also provides an opportunity to hold numerous bilateral - and other - meetings with political leaders, as well as business leaders, etc., from other countries. It also offers a chance to take part in numerous informal discussions where relationships that influence official decisions are forged.

## **7. THE PATH TO THE G20 AS AN IMPETUS FOR DEVELOPMENT**

Even before full membership, the very path to joining the G20 can serve as an impetus for Poland's development. The need to come up with a coherent national strategy for key areas may facilitate a cross-party, inter-institutional, and – ultimately - public discussion on the details of such a strategy. Given the synergistic effect, perhaps this would further strengthen Poland's development?<sup>34</sup>

Why is Poland still not part of the G20, despite its strong economic position (which is stronger than that of some G20 member states) and relevance for security issues?

First and foremost, in 1999, the year the Group was founded, Poland did not have the strong position it enjoys today. Political transition in Poland had begun only a decade earlier.

But thanks to the efforts of the Polish politicians (from Lech Kaczyński to Karol Nawrocki), today we are closer than ever. We have been invited to the summit in Miami by the G20 chair. This year it is the United States—the world's greatest power and our true (not just nominal) ally.

33 See the chapter "What is the G20?"

34 See the recommendations of the "Ideas for Poland" Forum; see the Appendix at the end of the report.



# POLAND IN THE G20: THE DOCTRINE OF MIDDLE POWER AGENCY (2025–2030)



Jadwiga Emilewicz  
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## G20 AS A STATE POLICY INSTRUMENT

Amid the crisis of the rules-based international order and in a world of major political upheaval, the significance of the G20 has been fundamentally changed.

G20 is no longer a mere platform for economic coordination among the largest nations. It is becoming the space of intensifying geo-economic competition, the place where new standards of stability are defined, and compromises among the major players are negotiated.

As we noted in the introduction and repeated consistently throughout this report, Poland needs to undergo a “mental revolution” and – in many respects a difficult, and perhaps even painful – transition away from the logic of prestigious participation to the logic of agency.

We should therefore view the G20 as a tool for advancing our country’s strategic interests. **We propose focusing on seven specific initiatives and projects:**

- **strengthening the region through establishment of a new development bank;**
- **building a global coalition of middle-income countries;**
- **strengthening cooperation with the Central Asian countries invited along with Poland to the G20 summit in Miami;**
- **diversifying Poland’s economic presence and engaging in new directions, including in the non-European world;**
- **promoting the concept of “defense as a public good” globally;**

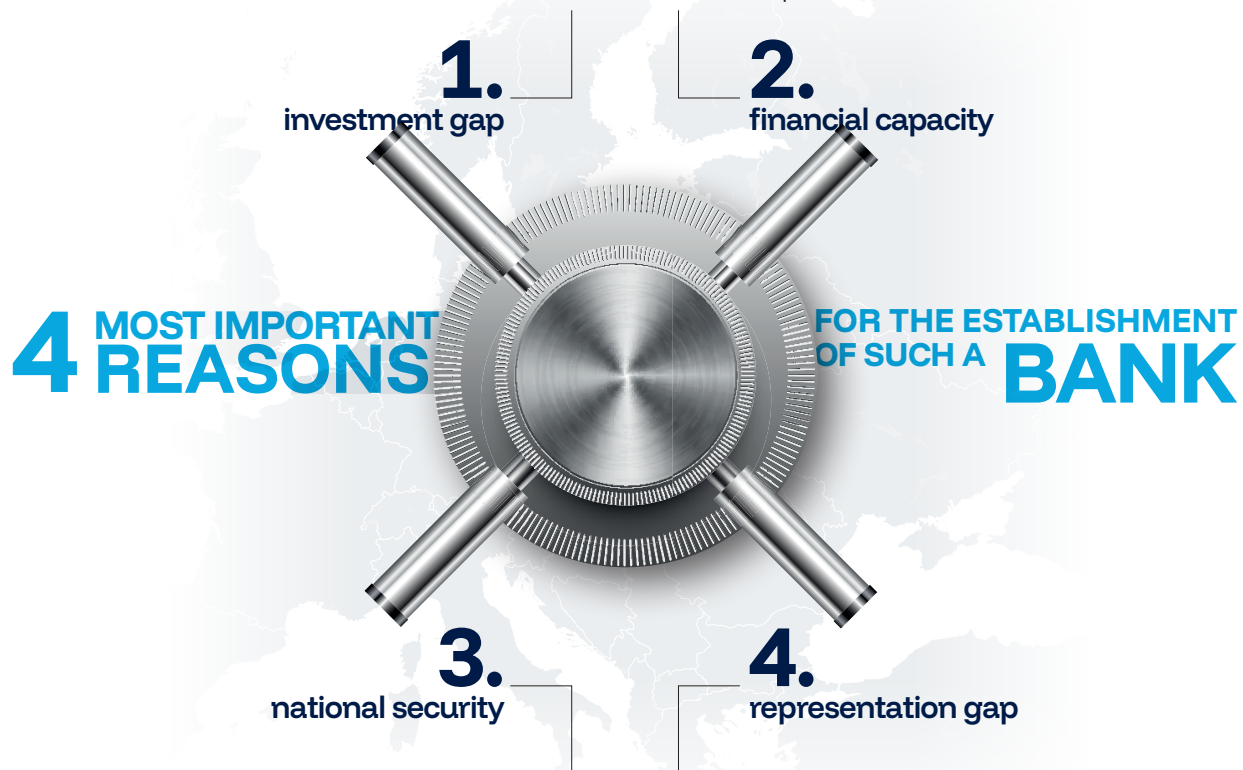
- a “resilient economy” and new macroeconomic stability in an increasingly complex international environment and a new phase of globalization;
- global promotion of “energy pragmatism.”

Each of these seven initiatives should be translated into specific institutional and diplomatic actions as well as sustainable projects.

## **A CENTRAL EUROPEAN G20 BANK: THE REGION’S INSTITUTIONAL VOICE WITHIN THE G20 FINANCIAL ARCHITECTURE**

Central and Eastern Europe as an EU region has high investment needs regarding energy, transport, digital infrastructure, critical infrastructure security, and resilience to geopolitical pressure. The scale of these needs calls for such an instrument.

Poland and the region have solid economic results, even on a global scale. In the future, the international community will face the challenge of rebuilding Ukraine. A Central European G20 bank could play a significant role in this process.



International involvement in the establishment of a financial institution headquartered in Warsaw has a deterring potential against the aggressors. Aggressive actions will become more risky as they will infringe upon the interests of many parties – investors and the bank’s stakeholders.

The CEE region is underrepresented in the international financial architecture, which should take into account the civilizational advancement of Poland and the region. A Central European G20 Bank could be a very useful instrument in addressing this imbalance.

## FOUR MOST IMPORTANT REASONS FOR ESTABLISHING SUCH A BANK

- 1. INVESTMENT GAP**

Central and Eastern Europe remains one of the EU regions with the greatest investment needs, particularly in the areas of energy, transport, and digital infrastructure, as well as critical infrastructure security and resilience to geopolitical pressures. The scale of the region's needs calls for an instrument of a greater sustainability, financial capacity, and operational capability.
- 2. BUSINESS OPPORTUNITIES**

Poland and the region continue to show strong economic results, not only compared to the EU but even on a global scale. In the near future, the international community may face the challenge of rebuilding Ukraine, devastated by the war. A Central European G20 bank could play a significant role in this process.
- 3. SECURITY**

The global community's involvement in a joint business venture and the establishment of a financial institution headquartered in Warsaw may deter potential aggressors and reduce the risk of aggressive, destabilizing actions as they would become significantly less profitable and more risky. Indeed, should such actions be performed, their cost would increase as they infringe on the interests of many more parties, including the bank's investors and stakeholders.
- 4. REPRESENTATION GAP**

The CEE region is underrepresented in the international financial architecture: its developmental interests are more often "incorporated" into the agendas of pan-European or global institutions rather than formulated as a distinct strategic perspective. This means the region has limited agency in the debate over investment priorities, financing standards, and project sequencing, which harms both the region and the global architecture—which, to function more effectively and better reflect contemporary realities, should take into account the civilizational advancement of Poland and the region. A Central European G20 Bank could address this imbalance.



## ESTABLISHMENT OF A NEW INTERNATIONAL FINANCIAL INSTITUTION

### **G20 Central and Eastern European Development Bank** *(G20 Central and Eastern European Development Bank)*

It would operate in a complementary manner to other development banks, including the EIB, the EBRD, and the World Bank, focusing on infrastructure investments in the region and, in the future—should conditions permit—on the reconstruction and modernization of Ukraine.

An advantage of such an institution would be **its ability to make rapid investment decisions and operate in a task-force mode**, which is crucial under time pressure and at a time of growing threats to infrastructure.

The bank would also ensure **greater regional “ownership” of projects—both in terms of strategic interest and economic benefits**. This would be achieved by involvement of companies from the region in project implementation, by developing the capital market and strengthening the development banking in the region. Such a bank would serve as an accelerator for the acquisition of new knowledge and competencies by the countries of the region.

#### **I. SHAREHOLDER MODEL: A STRUCTURE ALIGNED WITH THE LOGIC OF THE G20 AND DONALD TRUMP'S PEACE COUNCIL**

The shareholder model would be based on several groups and several principles:

First, all G20 countries as well as all the countries who received an invitation from President Donald Trump as the host of the G20 Miami Summit to join the newly established Peace Council would be invited to join the CEE Development Bank.

**Accession of Belarus and Russia to the bank would be an exception. It would certainly not be possible while military operations against Ukraine and other countries in the region are ongoing.**

At the same time, the success of this initiative (particularly in business terms) could bolster President Donald Trump's peace efforts. As we mentioned earlier, the CEE Development Bank should become a tool for meeting the needs of the entire region and become a shared success for all.

Therefore, invitations should also be extended to those CEE countries that were not invited to the Peace Council, including Poland's partners in the Three Seas Initiative and other regional formats: Lithuania, Latvia, and Estonia.

Such a structure would align with the logic of the G20 as a forum bridging North and South, security and development, public capital and the mobilization of private funds.

From Poland's perspective, it is important to maintain the region's majority share of voting rights and capital (60%) and to set limits on the share held by any single country (e.g., 15%), so that the institution remains regional by definition while also being attractive to external partners as a platform for stable investments.

### **FINANCIAL SCALE: HOW MUCH INVESTMENT COULD THE BANK GENERATE?**

The initial capital is assumed to be €5 billion, of which approximately 20% will come in the form of cash contributions spread over several years, and the remainder as callable capital.

This model is typical for development banks and allows—provided an appropriate rating is achieved—for the creation of lending capacity many times greater than the paid-in capital.

The Nordic Investment Bank (NIB) can be used as a benchmark to estimate the scale. In 2024, NIB disbursed approximately €4.4 billion in financing, while the value of outstanding loans stood at approximately €23.4 billion. Bank's equity amounts to around €4.6 billion it maintains an AAA rating. Loan-to-equity ratio is about five, which is typical for prudently managed development institutions.

If the CEE Bank had capital of €5 billion and established a credit rating comparable to that of the NIB, a realistic scenario following the start-up phase (3–5 years) would be a loan portfolio of €25–30 billion and annual disbursements of €4–6 billion (depending on the structure of the instruments and the pace of portfolio growth).

This would mean a significant, sustained increase in the supply of long-term investment capital in Poland and the region.

Importantly, the Bank's impact would not be limited to the volume of loans alone. The use of guarantees, co-financing, and project financing typically helps attract private capital.

Conservatively, it can be assumed that 1 euro of development bank financing mobilizes an additional 1–2 euros of private funds (depending on the project risk and the structure of the instrument).

In practice, the Bank's annual activity of 4–6 billion euros could therefore translate into 8–15 billion euros of total investment activity (public and private) in the region, once operational maturity has been achieved. However, this is an analytical estimate, not a promise—whether it materializes will depend on the rating, portfolio quality, and co-financing mechanisms.

## **OPERATIONAL PRIORITIES: INFRASTRUCTURE, TRANSPORT AND LOGISTICS, CAPITAL DEVELOPMENT OF THE REGION'S MARKETS**

The bank should focus on areas where the region has both the greatest needs and the highest strategic rate of return, such as:

- 1. energy and grid infrastructure**, including modernization and security of supply;
- 2. transport and logistics (North-South corridors, critical infrastructure resilience);**
- 3. digitalization and security of ICT infrastructure;**
- 4. development of the region's capital market and long-term instruments;**
- 5. under favorable conditions – the reconstruction and modernization of Ukraine (as well as Moldova and – ultimately – Georgia).**



## **POLAND'S POSITION AND ROLE IN THE BANK**

Choosing Warsaw as the seat of the Bank's headquarters would be of symbolic but also operational significance: it would facilitate regional coordination, shorten the distance to Ukraine, and strengthen Poland's role as the center for infrastructure financing and resilience in Central and Eastern Europe.

The presence of international institutions would also strengthen Warsaw's position as the region's financial hub.

## **HOW OTHERS DO IT: NIB AS PROOF OF FEASIBILITY**

NIB serves as a useful benchmark because it combines three characteristics required by the CEE Bank: (1) regional mandate, (2) high credit rating and access to low-cost capital, (3) capacity to finance infrastructure projects worth billions annually. In 2024, the NIB disbursed approximately €4.4 billion in financing and maintained a loan portfolio exceeding €23 billion, demonstrating that a regional institution can operate effectively and on a significant scale.

## II. COALITION OF MIDDLE POWERS: POLAND AS AN ACTIVE PARTICIPANT IN THE MIDDLE POWERS GROUP

The international system that shaped the Republic of Poland and has provided more than three decades of growth and development is becoming a thing of the past. Old paradigms are hitting the wall and institutions created under different conditions are no longer effective. They will either undergo a successful (often profound and thorough) transformation, or they will become dysfunctional and disappear, becoming a relic of a bygone era.

“New” ideas and constellations, such as Donald Trump’s Peace Council we already mentioned, are slowly replacing the old ones. The future of what is emerging, however, is unclear and uncertain; it is unknown what form it will ultimately take.

What is becoming increasingly evident, however, is the return of a world understood as an arena for the games of great powers, which fight and compete, only to come to an agreement and strike a deal. And all of this often takes place with the exclusion of others. Big Power Politics.

Such an international ecosystem poses a major challenge for countries that, although they possess significant economic, demographic, and political potential, are not superpowers, yet still aspire to security, development, and agency for themselves and their citizens.

These countries are middle powers. We use this trendy term, though we might just as well say “medium-sized countries.” That doesn’t change the essence of the matter, however. Poland belongs to this group, and it is time for us to begin pursuing a policy befitting that status.

G20 is ideally suited for this purpose, because although middle powers are often geographically and culturally distant from one another—and in the old world, sometimes politically as well—many of them are members of the G20 initiative; thus, this platform provides a natural setting for striking alliances on specific issues with other middle powers.

All the more so that at least two issues unite middle powers worldwide:

- first, the awareness that passiveness, lack of initiative, absence of new and creative solutions, and failure to cooperate will result in becoming dependent on the great powers and the outcome of their rivalries;
- second, even if we consider international law to be an illusion, middle powers have a shared interest in ensuring that it is respected to the greatest extent possible.

Scattered across the globe, middle powers are becoming, can, or should become an increasingly important element of the global governance system.

Their role consists of building bridges between the North and the South, diffusing tensions, and initiating compromises where the great powers are deadlocked. The G20 is a natural forum for this group, as it brings together both global powers and middle powers with growing agency.

As the largest country in Central and Eastern Europe, Poland has the potential to play an active

role in such a group, enriching and strengthening its agenda.

### THE MIKTA MODEL AS A REFERENCE POINT

prime example of cooperation among middle powers is the MIKTA format (Mexico, Indonesia, South Korea, Türkiye, Australia). It is a consultation platform established in 2013, bringing



### POLAND BEYOND THE REGIONAL FORMAT

Poland's foreign policy to date has focused on regional formats: the V4, the Three Seas Initiative, and the nearest EU's Eastern neighborhood.

**Membership in the G20 requires looking beyond the region and building a position on a global scale.**

**Poland should treat its role as a middle power not as a matter of prestige, but as an institutional project:** it should build topical coalitions, strengthen its ability to set the agenda, and represent the region's interests in the global debate. In this sense, middle powers are not a third party between great powers, but a stabilizing force within the rules-based system.

together G20 countries that are democracies with open economies but who hail from different cultural regions.

MIKTA operates without a permanent secretariat, relies on meetings of foreign ministers on the sidelines of G20 and UN summits, and derives its strength from its transregional nature. This operating model allows MIKTA to build consensus between developed and developing countries and to initiate solutions where rivalry among major powers hinders progress.

Poland should treat the MIKTA model as a benchmark for its own activities: a flexible, coalition-based format focused on topical effectiveness rather than on the creation of new bureaucratic structures.

### POLAND'S AGENDA AS A MIDDLE POWER

Poland could bring several significant strengths to a coalition of middle powers:

- the ability to **combine security and development agendas;**

- experience with political and economic transformation, coupled with its membership in the European Union;
- expanding the agenda to include **the experiences of countries in the region**;
- **building a bridge** between the region and the EU, the nearest Eastern neighborhood of the EU and Central Asia;
- a commitment to maintaining (to the greatest extent possible) **a rules-based order**.

### **INSTITUTIONAL RECOMMENDATIONS (2025–2030)**

By the end of 2026, the Ministry of Foreign Affairs should launch a Polish consultation platform for middle power countries, bringing together partners from various regions. In practice, this could mean regular meetings on the sidelines of G20 summits with countries such as Türkiye, South Korea, Mexico,



**Within the G20, Poland should therefore raise issues that are a natural focus for middle powers, such as: infrastructural resilience, energy security, financial institution reforms, diversification of global supply chains and the creation of new ones, and the reconstruction of Ukraine.**

Indonesia, and Australia (potentially also Argentina, Saudi Arabia, and South Africa, and perhaps also the Nordic countries (those who which are not represented in the G20).

Poland should also strengthen its analytical capabilities regarding the Global South so as not to limit its activities to a Euro-Atlantic perspective. Membership in the G20 provides an opportunity to rebuild Poland's presence in the regions

where its diplomatic activity has been limited in recent decades.

### **HOW OTHERS DO IT: MIKTA AS A CATALYST FOR CONSENSUS**

MIKTA demonstrates that middle powers can increase their agency not by competing with major powers, but by forming topical coalitions. This group has been used as a consultation platform on issues such as global trade, reform of international institutions, and development

cooperation. Poland can adapt this model by becoming the initiator of similar formats at the European level.

### **III. TASHKENT-ASTANA-WARSAW, G20 MIAMI – A COMMON CAUSE**

President Donald Trump's invitation of Poland, Kazakhstan, and Uzbekistan to the G20 summit in Miami is an excellent opportunity to strengthen relations with these countries and the entire Central Asian region.

Such cooperation would be a symbolic success for the summit's host, demonstrating its ability to unite even seemingly distant countries around the idea of peaceful and pragmatic business.

Despite the geographical distance, Poland and the countries of Central Asia have much in common. Among them are the shared past as part of the Russian Empire and later in the Eastern Bloc (the Central Asian countries as Soviet republics, Poland as the People's Republic of Poland), the Polish diaspora, and many people of Polish descent who live in Kazakhstan, Uzbekistan, and other countries of the region.

From the perspective of Polish companies and businesses (incl., for example, Selena S.A.) and as attested by the co-author of this report, Krzysztof Domarecki, Chairman of Selena's Supervisory Board, all of this makes the markets of Central Asian countries attractive even when compared to other Asian countries, and relatively easy to navigate and communicate with.

#### **RECOMMENDATIONS**

This year's G20 summit is an excellent opportunity to form closer ties with the region that has remained outside Poland's sphere of interest for the past 30 years. It is especially true given that with powerful neighbors such as Russia and China, the region welcomes all partners with open arms.

This could be facilitated by the first visit of a Polish president to Kazakhstan and Uzbekistan in 10 years. In addition to promoting Polish business, interpersonal and cultural cooperation, and contacts with the Polish diaspora in the region, key items on the agenda of such a visit could be joint participation in the G20 summit in Miami and a meeting between think tanks and business organizations from Kazakhstan, Uzbekistan, and Poland. The Sobieski Institute could undertake this task.

When it comes to potential areas of cooperation, attention should certainly be paid to the so-called "Middle Corridor" – a transportation corridor connecting Europe with the Pacific, passing through Central Asia and Poland, and bypassing Russia. Middle Corridor is being developed by Kazakhstan and Uzbekistan.

The development of the corridor is of a business benefit to all sides, offering Poland a slightly more expensive and longer, yet still viable, alternative to the corridor that runs through Russia and Belarus. It would serve as a backup in the event of destabilization in our immediate neighborhood.

Active cooperation in the development of the Middle Corridor would also serve as a form of support for Donald Trump's peace efforts and an argument that business needs stability and peace to thrive.

#### IV. GLOBAL DIVERSIFICATION: THE G20 AS A PLATFORM FOR POLAND'S ECONOMIC EXPANSION



##### STRUCTURAL IMBALANCE OF THE POLISH DEVELOPMENT

**Polish economy remains one of the greatest success stories of transformation in Europe**, yet its development model still displays high geographic concentration. Approximately four-fifths of all Polish exports go to the European Union market, primarily to Germany.

**Such a structure was a rational choice in an era of stable globalization and growing European integration. However, in the context of the increasing fragmentation of the global economy, it is becoming a source of strategic vulnerability.**

Great power rivalry, trade wars, technological pressure, and the growing importance of the Global South mean that middle powers must diversify their economic ties. In this context, the challenge for Poland lies not only in increasing exports, but also in establishing a lasting economic presence outside of Europe.

Membership in the G20 may provide Poland with a unique instrument of prestige and political influence. In many countries in Africa, Latin America, and Asia, a G20 status and political patronage open doors that remain closed to countries perceived solely as middle-sized EU states. Poland should leverage this political capital as a tool for economic expansion.

### **G20 AS THE OPPORTUNITY TO REBUILD PRESENCE IN THE GLOBAL SOUTH**

Following the closure of many diplomatic outposts in recent decades, Poland has allowed part of the Global South to slide under the narrative dominance established by other countries. The G20 could contribute to remedying this situation. Poland's presence in this forum creates an opportunity to build political and economic relations with countries of increasing importance for the global growth in the coming decades.

In the case of Poland, this does not necessitate pursuing a great power policy, but rather a pragmatic strategy for a middle power state: developing a network of contacts, identifying sectors of comparative advantage, and utilizing state instruments to support corporate expansion.

More on this can be found in the chapter written by the founder, long-time CEO, and Chairman of the Supervisory Board of the global Polish company Selena FM S.A., Krzysztof Domarecki.

### **PRIORITY SECTORS AND INSTRUMENTS**

Poland has export potential in sectors that are particularly in demand in developing countries. These include:

- transportation infrastructure and construction,
- energy and grid modernization,
- digital technologies and cybersecurity,
- agricultural and food industry,
- engineering services and industrial components.



Expansion into non-European markets cannot be based on promotional activities only. It requires financial instruments, diplomatic support, and an institutional presence.

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The Polish Investment and Trade Agency's strategy for 2025–2029 is a step in the right direction. However, without political support at the highest level, its effectiveness will remain limited.

### **INSTITUTIONAL RECOMMENDATIONS (2025–2030)**

We recommend that the “Poland Global South Initiative” program be established by the end of 2026. It should be coordinated by the Ministry of Foreign Affairs and the Ministry of Development and Technology, with the aim of ensuring Poland’s systematic presence in Africa, Latin America, and South Asia.

The program should encompass:

- 1. rebuilding of diplomatic and economic networks** in priority regions;
- 2. trade missions** linked to the G20 summits’ schedule;
- 3. export and investment financing** instruments (Bank Gospodarki Krajowej, KUKE – the Polish export credit agency);
- 4. identification of infrastructure projects** Poland could take part in;
- 5. cooperation with regional partners** within the Global Gateway framework.



#### **Poland should also leverage political patronage in bilateral relations.**

In many countries of the Global South, the presence of a prime minister or president is prerequisite for opening the market for large infrastructure projects. Membership in the G20 gives Poland the opportunity to be promoted to this league of economic diplomacy.

### **NARRATIVE DIMENSION: BALANCING INFLUENCES, A UNIQUE PERSPECTIVE**

Information dimension is another important aspect of this. For years, Russia has been successfully promoting its narrative in the Global South, portraying the war in Ukraine as a conflict between the West and the rest of the world. Poland, given its history over the past two centuries, has a unique credibility when presenting perspectives on security and international order, which by all means is not so self-evident among European nations.

Using the G20 as a platform for dialogue with the Global South can support both the country’s economic and strategic interests.

## HOW OTHERS DO IT:

### BRAZIL AS A GATEWAY TO LATIN AMERICA

Brazil, who currently holds the G20 presidency and is emphasizing the interests of the Global South, sets a good example. For Poland, it is an opportunity to redefine its relations with Latin America. The conclusion of political consultations between Poland and Brazil, as well as ratification of the agreement on avoidance of double taxation lay the foundation for deeper economic cooperation. Brazil could become a gateway for Poland to a broader presence in the region, just as Türkiye serves as a bridge to Central Asia and the Middle East.

## V. SECURITY AS A PUBLIC GOOD: A NEW FISCAL ORDER FOR DEFENSE

### DEFENSE AS A SYSTEMIC CHALLENGE

With defense spending projected to reach around 4.7% of GDP, Poland faces the unprecedented challenge of reconciling security investments with the European Union's fiscal rules. The scale of the armed forces' modernization and the need to maintain deterrence capabilities imply a sustained increase in public spending that cannot be treated as a short-term exception.

Nonetheless, Poland is not the only one facing this challenge. The war in Ukraine has made it clear that the European fiscal architecture was constructed during the era of the "peace dividend," when a permanently stable and secure environment was

a given. In the new geopolitical reality, countries must fund their defense at a level that for decades had been deemed unattainable under the existing framework, which poses a significant challenge for democratic states.

### THE END OF THE WASHINGTON CONSENSUS IN SECURITY POLICY

The COVID-19 pandemic, followed by the war in Ukraine, has changed the nature of public spending. Countries have been forced to bear costs that do not constitute traditional budgetary consumption but rather investments in systemic resilience: health, energy, infrastructure, and military security.



In this context, fiscal rules derived from the logic of the Washington Consensus—which assumes that a country's stability can be boiled down to limiting debt and deficit regardless of the strategic context—are becoming increasingly inadequate. New era calls for a revision of this approach: security is not a side effect of economic policy, but a prerequisite for the functioning of the economic order.

Within the G20, Poland should promote cooperation and coordination among defense industries. In this regard, it is in Poland's interest to look beyond the EU framework, as Poland already cooperates with the U.S. and South Korea, outside of Europe.

### **DEFENSE AS A GLOBAL PUBLIC GOOD**

Poland can bring two arguments to the G20 debate.

First, it should counter the narrative portraying Poland and the region as a confrontation-oriented "warmonger" and patiently explain something that is often not at all obvious to representatives of the international community, especially for geographically distant countries of the Global South: namely, that in this part of the world defense spending is a rational strategy and an investment in the security of the state and its citizens.

Second, Poland should argue that defense is no longer solely a national expense but is becoming a global public good. Preventing aggression, stabilizing the eastern flank and the region, and maintaining order are not only in Poland's interest but in the interest of the entire international community.

In this sense, defense spending should be treated in the same way as other public goods of global significance: financial stability, maritime safety, and climate action. Military security is the foundation upon which international trade, investment, and stability of economic institutions rest.

### **POLAND'S AGENDA IN THE EU AND G20**

Poland should take a political initiative to advocate for special treatment of defense spending under the EU's fiscal rules and in the debate on a new architecture for fiscal stability within the G20. In particular, efforts should be made to:

- **permanently exclude** certain defense expenditures from the excessive deficit procedures under the EU rules;
- recognize investment in deterrence as **an element of security for the whole community**,
- create **European long-term financing instruments for defense**;
- under favorable circumstances, include defense industry cooperation with non-EU countries in **the rules for financing the European defense base** from the EU funds.

The *national escape clause* mechanism under the Stability and Growth Pact is a step toward adaptation, but it does not solve the problem structurally. Poland should build a coalition of countries advocating for a new European fiscal agreement that takes into account growing security needs.

## THE ROLE OF THE PRESIDENT OF THE REPUBLIC OF POLAND

### **The President of Poland could serve as a promoter of international defense industry cooperation,**

using his position to initiate dialogue and launch specific projects not only within the EU but also in relations with partners outside the EU, such as South Korea and the United States.

As part of the mission at the G20 forum, his activity could include **promoting joint research and development programs, joint procurement mechanisms, and cooperation regarding supply chains**, which enhance interoperability and industrial resilience.

Cooperation with major economies and global corporations provides middle powers with benefits in the form of access to technology, economies of scale, and markets that they cannot fully develop on their own. The presidential initiative could also emphasize the need for technology transfer to Polish SMEs, the integration of subcontractors, and instruments for financing exports and co-production.

The G20 forum can be used to promote standards, supply chain safeguards, and principles of responsible technology transfer to reduce political and legal risks for partners. This vision of the president's role combines security objectives with industrial policy, strengthening Poland's position as a reliable partner and as a cooperation hub in the region.

### **INSTITUTIONAL RECOMMENDATIONS (2025–2030)**

By 2026, the Ministry of Finance and the Ministry of National Defense should develop a sustainable model for defense financing outside the traditional annual budget, including through security bonds, special-purpose funds, and European instruments. At the same time, Poland should develop analytical capabilities regarding the long-term costs of deterrence and the impact of military spending on macroeconomic stability.

As part of the G20, Poland could initiate a debate on how governments finance deterrence and defense in the 21st century, and how to maintain fiscal stability amid rising costs of military modernization.

### **HOW OTHERS DO IT: THE U.S. AFTER THE PANDEMIC AND PUBLIC INVESTMENT POLICY**

In the US, defense spending has been rising for several years—increased Pentagon budgets, additional aid packages for allies, and modernization programs (including investments in the production of advanced systems, semiconductors, and supply chains) are considered as both: a security measure and a fiscal stimulus. These expenditures drive domestic demand through public

procurement, job creation in the defense industry and among subcontractors, and increased investment in research and development, which translates into short-term GDP growth and multiplier effects. In the context of current geopolitical tensions and modernization programs in the U.S., rising defense spending strengthens their domestic industrial base, but at the same time poses fiscal challenges and requires long-term budget planning.

## **VI. “RESILIENT ECONOMY”: NEW MACROECONOMIC STABILITY**

### **GLOBALIZATION: NOT NECESSARILY PLEASANT OR FRIENDLY**

In the third decade of the 21st century, economic security has ceased to be an abstract concept and became a central pillar of the G20 members’ national security doctrines. In an era of disrupted supply chains, technological pressure, and the weaponization of trade, states can no longer treat the economy as a sphere neutral to geopolitics. Trade, energy, and technological dependencies have become tools of political coercion.

For Poland, the ability to independently identify and mitigate economic risks is a prerequisite for sovereignty. Contemporary economic security encompasses screening foreign investments, actively supporting inward investments, preventing technology transfers to non-market actors, protecting the integrity of supply chains, and building resilience to external shocks.

### **NEW DEFINITION OF MACROECONOMIC STABILITY**

The most important strategic change should be **the inclusion of economic security into the new definition of macroeconomic stability**. A country’s stability no longer boils down to low inflation and fiscal discipline, but it includes the economy’s ability to function under external pressure in the event of an energy crisis, trade blackmail,

or disruptions in the supply of technology and raw materials.

Economic resilience thus becomes part of national security, rather than merely a matter of economic policy. Countries that are unable to protect their supply chains, critical infrastructure, and strategic sectors lose the ability to pursue autonomous policies.

## INSTITUTIONAL RECOMMENDATIONS FOR POLAND

It is recommended that a National Center for Economic Security be established by the end of 2026, operating under the Office of the Prime Minister. It should, as an institution, coordinate the analyses of geoeconomic risks, investment screening, and monitoring of priority sectors. The Center should integrate competencies currently dispersed among sectoral ministries and intelligence agencies. An in-depth analysis of the competencies possessed in this area by central government institutions should be conducted, for example by expanding the current mandate of the Government's Agency of Strategic Reserves (RARS) to include an active role in managing Poland's industrial strategic reserves.

### POLAND SHOULD RAISE THE FOLLOWING ISSUES AS PRIORITIES WITHIN THE G20:

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- supply chain resilience,
- protection of critical infrastructure,
- countering energy blackmail,
- resilience to economic coercion in trade.

## HOW OTHERS DO IT: JAPAN AND SOUTH KOREA

Japan and South Korea are examples of middle-income countries that have developed their own supply chain resilience strategies. After 2010, and then following the experiences of the pandemic, Japan launched public programs supporting the return of strategic component production to the country and diversifying its supply sources from South East Asia, thereby reducing dependence on a single direction of imports. South Korea, for its part, has adopted the K-Supply Chain Strategy package, which includes government support for the semiconductor, battery, and critical raw materials sectors, as well as the creation of an early warning system for supply disruptions. Poland can adapt these solutions to the European context, building economic resilience as an element of national stability.

## VII. ENERGY PRAGMATISM: A CHECK ON CLIMATE IDEALISM

### ENERGY TRANSITION AS A TEST OF THE STATE'S AGENCY

energy transition has become one of the main areas of tension in the global economy. In the G20 countries, the tension arose not only around the debate on climate policy, but it developed into a dispute over the pace of required changes, social costs, and the security of energy supplies. The war in Ukraine has shown that energy remains a fundamental instrument of geopolitical pressure, and dependence on a single supplier can be exploited for political blackmail.

In this context, Poland should present to the G20 the perspective of a country that supports emissions reduction targets but at the same time emphasizes that the transition must be carried out in a realistic manner: it needs to account for the security of the power grid, industrial competitiveness, and resilience to external crises. Poland can play an important role in counterbalancing climate idealism, pointing out that energy policy cannot be divorced from geopolitics and the structure of the economy.

### DIVERSIFICATION AS A SECURITY STANDARD

One of the fundamental conclusions that must be drawn from recent development is the need to move away from thinking about energy transition as a single, universal path. Countries differ

in terms of their energy mix structures, level of development, geographical conditions, and position within the international security system. Attempts to impose a uniform model of transition have led to social tensions, destabilization of energy prices, and increased vulnerability to external pressure.

Poland should promote diversification as the standard for energy transition. This means building an energy mix based on several pillars: renewable energy sources, nuclear power, stable gas supplies as a transition fuel, and the development of transmission infrastructure. Diversification is not merely a technological issue, but a strategic decision that reduces the risk of dependence on a single supplier, single import route, or a single technology.



### NUCLEAR ENERGY AS A SYSTEM STABILIZER

**In Poland's narrative at the G20 forum, nuclear energy should occupy a special place. By implementing the Polish Nuclear Energy Program, Poland can become an example of a middle-sized country that combines climate ambitions with responsibility. Nuclear power provides stable baseload power for the energy system, while allowing for the development of renewable energy sources and maintaining industrial competitiveness.**

In the international debate, Poland should argue that nuclear energy is not an alternative to the energy transition, but rather one of the prerequisites for its success in countries with a large share of energy-intensive industry. Without a stable source of baseload power, the transition could lead to rising costs, inflationary pressure, and a weakening of the state's ability to pursue an independent economic policy.

### **POLAND'S AGENDA IN THE G20**

Poland should use its presence in the G20 to promote a pluralistic approach to energy transition. In practice, this means addressing issues such as:

- recognizing energy security as an element of climate policy;
- diversification of energy sources as a standard for resilience;
- nuclear energy as guarantor of the energy system's stability in middle-income countries;
- transmission infrastructure and energy storage as prerequisites for energy transition;
- resilience to resource and energy blackmail.

Within the G20, Poland could launch the **“Energy Security for Middle Powers”** cooperation framework, bringing together countries undergoing energy transition amid geopolitical pressures and under industrial constraints.

### **INSTITUTIONAL RECOMMENDATIONS (2025–2030)**

By 2027, Poland should establish a permanent mechanism for integrating central administration with the energy industry to enable efficient investment decision-making. Such approach will also require the development of the resource diplomacy: securing access to LNG, uranium, and critical metals. Without them, the energy transition remains vulnerable to external disruptions.

Within the G20 Poland should, at the same time, establish its expert position as a country who brings the perspective of system security relevant to middle-income countries to the energy debate. Middle-income countries remain exposed to high uncertainty stemming from instability of the energy markets.

## HOW OTHERS DO IT: FRANCE AND NUCLEAR POLICY

France is an example of a country that has consistently treated nuclear power as the cornerstone of its energy sovereignty. By maintaining a well-developed nuclear sector over the decades, it has reduced its dependence on fossil fuel imports and managed to stabilize energy prices for the French industry. In the context of the energy crisis after 2022, the French model has become a benchmark for countries seeking stable baseload energy sources during the transition.

However, France's advantage stems not solely from the infrastructure itself, but from the active policy of the state, which treats nuclear energy as a strategic project rather than a market sector. First, France has pursued a consistent legislative

and diplomatic offensive within the European Union, seeking to have nuclear power recognized as a technology compatible with climate goals. The inclusion of nuclear energy in the EU's green investment taxonomy was the result of this effort and paved the way for cheaper financing of nuclear projects in Europe.

Moreover, France has launched state-run financing and planning instruments for nuclear investments, including a program to build new reactors (EPR2) and mechanisms to stabilize energy prices for industrial consumers. The country also uses EDF, re-nationalized in 2023, as a strategic tool rather than merely a commercial enterprise, to maintain full control over the sector as a matter of national security.

## SUMMARY: POLAND IN THE G20 AS A NATIONAL PROJECT

The eight initiatives presented above constitute Poland's doctrine of agency as a middle power within the G20. Their common goal is the shift away from passive participation to active co-creation of the global agenda, for which the G20 serves as an ideal starting point.

In the context of the growing fragmentation of the global economy and the crisis of the international legal order, middle powers are becoming one of the main stabilizers of the international system. Poland, as the largest country in Central and Eastern Europe, has the potential to play such a role.

When it comes to economic resilience, Poland should help shape the new definition of macroeconomic stability to encompass supply chain security,

**Membership in the G20 means joining a forum that accounts for approximately 85% of global GDP, over 75% of global trade, and nearly two-thirds of the world's population. We must view this membership not as a prestigious "entry pass" but as a strategic tool** that can boost our national security, the region's standing, and economic development.

protection of critical infrastructure, and resilience to energy and trade blackmail. In the energy sector, Poland pragmatically ground the discussions by promoting diversification and nuclear energy as a stabilizing force for the system amid geopolitical instability.

In terms of funding the defense and security, Poland faces a challenge unparalleled on the EU scale: defense spending at around 4.5–4.7% of GDP necessitates the creation of a new fiscal

paradigm in which defense is treated as an investment in the global public good, rather than remain a mere national budgetary cost. Poland could become a champion for special treatment of defense spending under the EU fiscal rules and in the G20 debate.

Establishment of the Central and Eastern European Development Bank with an initial capital of 5 billion euros would be a noteworthy initiative from an institutional perspective. With the

Nordic Investment Bank as a benchmark, it is evident regional institution with such capital could, within a few years, build a loan portfolio of €25–30 billion, provide annual investment financing of €4–6 billion, as well as mobilize a total of up to €8–15 billion in annual investment activity in the region through co-financing and guarantee instruments. This would mean a sustained increase in the supply of long-term infrastructure capital in Poland and Central and Eastern Europe.

At the same time, Poland should view the G20 as an opportunity to strengthen its position within the EU (as well as that of the Union itself) by developing relations with non-European countries, such as Kazakhstan and Uzbekistan—which were invited to Miami this year—or by building a platform for economic expansion beyond the EU, a goal in which the G20 can assist.

Currently, approximately 80% of Polish exports go to the European market, which, in the context of global fragmentation, increases Poland's structural vulnerability. Diversification understood as Polish presence in the markets of Africa, Latin America, and South Asia should become one of the priorities of the state policy, and the prestige that comes with G20 membership can open doors to new economic partnerships.



Poland's membership in the G20 could become its **greatest geopolitical advancement since joining the EU**, but only if it is translated into institutions, initiatives, and projects of a lasting character.

The doctrine of middle power agency, which we have presented in this chapter and which, we hope, will stir the interest of policymakers and the public, means that Poland will do more than just sit in a club of global reach but also use its position to strengthen the region's security, development, and standing in the 21st-century world.



# THE G20-50 PROGRAM AS A MAJOR IMPETUS FOR POLAND'S DEVELOPMENT



Krzysztof Domarecki

**T**he prospect of Poland joining the G20 should serve as an impetus for Poland and its people to embark on a new phase of strengthening Poland's international standing and the country's overall development.

However, the concept of "Poland in the G20" should not be limited to Poland's permanent participation in the G20's work. Instead, "Poland in the G20" should become a rallying cry for development of a program to build consistent and significant Polish presence in the economies and societies of the G20 member countries.

This perspective can serve as a significant impetus for formulating and implementing a package of long-term actions and projects that will lead to a much stronger Polish presence in specific countries, societies, and their economies. The focus here lies with countries that had, so far, been largely outside the scope of our serious interest, yet who constitute the most important political and economic entities of the modern world.

Making the program specific would facilitate its development and implementation; it could be well parametrized, and it can serve our national interests better than ever before.

Such a program should be run consistently for at least the next 25 years – until 2050 (hence the name G20-50 Program) – and extended beyond this date by subsequent generations of Poles.

The program's effectiveness and efficiency require identification of specific areas to focus resources on, such as: economy and trade, culture, science, youth, and sports.

Through planned and consistent efforts sustained over the years, we can arrive at creating a new level of ties between Poland and the world's most significant countries—reaching far beyond the European arena we are familiar with.

This is also a way to - at least partially - bridge the gap that still exists between Poland and its western neighbors in terms of their multifaceted connections with the rest of the world, and a very practical way to gradually overcome our peripheral status.

## **MECHANISMS OF GLOBALIZATION - WHY IS THIS POSSIBLE?**

The greatest - though often underappreciated - driving force behind globalization and multi-level international connections on a mass scale is technological progress, which has taken place in nearly every field over the past 50 years.

It is new technologies that have led to a radical reduction in the costs of both: international passenger and freight transports. This is magnified by the reduction of information transfer costs to virtually zero. The development of the Chinese economy on such a massive scale would not have been possible without this progress. The same mechanisms also apply to medium-sized economies. The difference among them lies with

the fact that some of them benefit from these mechanisms globally (e.g., South Korea, Taiwan, Singapore, and, to an increasing extent, Türkiye), while others do so only on a regional scale. More importantly, these factors do not diminish even in the face of geopolitical tensions and the world's fragmentation into blocs. Humanity has enough energy and willpower to develop despite these limitations.



**Building a stronger than ever position of Poland within the societies and economies of other countries is far more realistic today than it has been in the past.**

Even now, with virtually no incentives or stimulus from the government, Polish entrepreneurs are increasingly putting these mechanisms to work. They have – unprompted and in a practical way - realized that they allow them to operate on a scale and over distances that were previously unattainable. Admittedly, at this stage of our development, the group of entrepreneurs benefiting from globalization through expansion into non-European markets is relatively small. However, these are the trailblazers proving to everyone else that this is not only possible but also highly beneficial in many ways.

## POLAND IN THE G20 WORLD

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If the goal of the Poland G20-50 program is to **establish a lasting and significant presence of Poland in the economies and societies of the G20 member states**, then the actions undertaken under the program must cover a wide range of areas. The most important of these are:

- **the economy**—the most important area, including:
  - presence of the Polish companies in these markets,
  - attracting investment and investors from these countries to Poland;
- promotion of the **Polish culture**;
- **academic exchange**;
- promoting **mutual understanding**
  - mainly among the younger generation;
- **tourism** – the presence of Poles in G20 countries;
- **sports**.

Of course, other areas can also be included; however, for the sake of efficiency during the initial phase, it is those that resonate best with the public that should be selected, i.e. the areas that will best serve the purpose of boosting Poland's presence and recognition within the societies of specific countries.

### **ECONOMY: STRUCTURE OF POLISH EXPORTS BETWEEN 1989–2024**

As of 2024, nearly three-quarters of all Polish exports go to the EU markets, and nearly 88% to European countries.

This situation is closely linked to the ownership structure of the companies that export out of Poland: 65% of Polish exports is done by facilities located in Poland but belonging to international corporations, 7% of exports is performed by the State-owned companies, and 28% by private Polish enterprises –including exports of agri-food products.

Mass sale of state-owned enterprises to multinational corporations after 1989 has weakened our export potential.

In a situation where the vast majority of private companies had to be built from scratch, it was only natural that European markets became the primary export destinations. They were closer, more readily accessible and easier to comprehend.

There were many reasons for this, including:

- the size of the EU single market,
- geographical and operational proximity,
- cultural similarities,
- relatively low barriers in terms of headcount and capital needed to launch export operations.

Considering all of the above, it is no coincidence that non-European countries have not been a major destination for the geographic expansion of the Polish companies up to date. As distance increases, so does the risk; operational efficiency faces greater challenges; and, in the absence of a colonial past, workforce capable of handling these challenges is less readily available.

Nevertheless, if Polish companies wish to keep up their current growth dynamics, the need to enter non-European markets will become increasingly urgent. Indeed, there is still plenty of

room within the EU; however, the battle for market share in mature markets is becoming more and more difficult, and their growth dynamics are nearing zero.

The economic potential of Polish companies is growing systematically, and data on the structure of exports shows that the growth potential lies with the expansion of domestic enterprises into the non-European countries who have, simultaneously, the strongest economies in their respective regions.

## **INTERNATIONAL EXPANSION OF THE POLISH COMPANIES AS THE ECONOMIC CORE OF THE G20-50 PROJECT**

Gradual establishment of a strong and consistent of the Polish companies in the G20 markets should constitute the core of this program, while at the same time offering, from the very outset, the opportunity for a consistent return on the investments made and resources committed.

Entrepreneurs themselves have the most work to do in this regard, which includes:

- performing specific market research,
- selecting markets where given companies can display competitive advantages,
- building, strengthening, and tailoring the product offer,
- localizing in terms of language and culture,
- finding business partners,
- ensuring durability of the investment.

Next steps include: establishing local branches, hiring local employees and managers, strengthening joint venture partnerships, and potential equity investments into local production capacity or acquiring local companies.

Such expansion takes years to implement for a single company, but the success bonus grows over time.

The state has a role to play in this process. It goes far beyond the liberal dogma. This role should be carried out through specific industrial policies linked to clear macroeconomic and political objectives. Mechanisms to support expansion into foreign markets are only part of such policies and should be multi-level:

- ensuring sanctioned, increased presence of the Polish diplomatic missions in the G20 countries;
- broadening the mandate of the Polish Investment and Trade Agency, the scope of its tasks, as well as developing its organizational and human resources;
- ensuring consistent participation of the Polish companies in local trade fairs and industry conferences;
- performing and publishing analyses of the market needs of individual economies, their structural imbalances, and the opportunities these open for the Polish enterprises;
- supporting Polish companies who already operate in selected markets.

Given the wide diversity of economies and cultures within the G20, it will be necessary to conduct individual assessments of the opportunities and risks associated with an increased presence in each country.

It will – without a doubt - be easier to enter the markets of countries such as the U.S., Canada, Brazil, Argentina, or Saudi Arabia.

Entering the highly competitive markets of Asian countries will be a greater challenge, especially since economic policies—including entry barriers erected by individual countries – vary significantly.

The individual choices of specific companies should be supported by the actions of relevant government agencies and bodies, since it will be up to them to break down some of the existing barriers.

### **GREATER GEOGRAPHICAL DIVERSIFICATION OF EXPORT MARKETS IS CRUCIAL FOR SEVERAL REASONS:**

- 1.** In most industries, especially traditional ones, increasing market share in the EU countries is extremely difficult and often practically impossible. Long-established companies and brands, with traditional customer base and long-established distribution channels, are largely immune to attempts by players from new EU member states to enter the market.
- 2.** Europe is a large and stable market, yet in the case of most industries it is growing slowly or not at all.
- 3.** For companies, building a sustainable presence in non-European markets almost automatically requires raising the quality of management to the next, higher level, which in turn leads to the company's greater ability to compete effectively in the EU market as well.

A planned and well-prepared expansion of Polish companies into the G20 markets could lead to a qualitative shift in their international market position.

## THE ROLE OF THE CPK



**The CPK Airport will be a natural factor greatly facilitating the G20 strategy. Although from a business perspective it is about 15–20 years overdue, over time and as an increasingly robust network of connections is being built, it will become a key transportation hub, enabling businesses, government officials, and representatives of the cultural and scientific communities to reach many destinations more efficiently and quickly than in the past, and to maintain regular contacts.**

### PROMOTION OF THE POLISH CULTURE ASA PILLAR OF THE G20-50 PROGRAM

Paradoxically, it is in Poland's best interest for the G20 accession process to be spread over a number of years, and not be a one-time, immediate event as this will mobilize various social groups, government agencies, entrepreneurs, cultural creators, and researchers to act.

As part of this process, the understanding of Poland among the public and elites of the G20 countries must be consistently broadened and deepened, recognition of the Polish culture must be built, youth exchange programs intensified, and, above all, an increasingly strong presence of the Polish companies in the markets of individual countries must be established.

Polish culture contains many universal elements—and these are the ones that sell best around the world. For now, we're hardly promoting them.

The Koreans created K-pop and turned it into a global export commodity boosting the country's recognition.

Germans invite their customers to Oktoberfest, which is being celebrated in a growing number of countries. Poland has, above all, Chopin's magnificent music and a decent, though still insufficient, tradition of promoting it. It also has other traditions—ones that more easily appeal to the tastes of mass audiences. One of these is the long-standing, colorful tradition of the harvest festivals. Turning it into a mass-culture festival to which we invite guests and tourists from around the world could be an excellent tool for promoting the country.

Being able to invite customers in a chosen country to a Chopin concert organized locally by the Polish institutions, or to a Polish harvest festival—an event that can be successfully organized anywhere in the world—is, for now, a dream, but also a growing need for the Polish global business.

It is not the purpose of this study to identify ways to use Polish culture to strengthen our international position. I merely wish to point out that Polish entrepreneurs building their brands in global markets see a convergence of their companies' economic interests with the need to promote Poland and its cultural heritage around the world.

We, as entrepreneurs operating on an international scale, need Poland to rediscover its commitment to culture, so that creators and artists can represent its values—rooted in our finest traditions—in a contemporary form. We need the Polish government and cultural institutions to learn how to translate their works into Polish export hits that will strengthen our global recognition.

### **HISTORICAL CONTEXT: THE PAST AND THE FUTURE**

Throughout the Middle Ages, the societies of Western Europe maintained vibrant economic, political, religious, and scientific ties. The fairs of Champagne, the weavers of the Low Countries, the merchants of Genoa and Venice—these constituted their economic base. These relationships also included vast networks of monasteries, travelling artists and creators, and even conflicts between rulers.

**Beginning with the Age of Discovery, Western European societies have been forging ties with the rest of the world for over 500 years.** Regardless of the imperial and colonial nature of these activities, this period allowed for the establishment of lasting social and economic ties between Western nations and nearly every country in the world. These ties persisted for decades after the end of colonialism.

These ties remain strong today and provide Western European companies with a capacity for a relatively easy market penetration, regardless of the market's geographic location.

The map of air connections is a visible manifestation of these ties, as well as their modern glue:

- **British Airways** – offers the most flights to India, the U.S., and Canada, and is the only European airline to fly to Australia and New Zealand.
- **Air France** – offers the most flights to Africa in Europe.
- **Iberia** – has the largest number of flights to South America.
- **TAP Portugal** - among all European airlines, it offers the most flights to Brazil, and is the only European airline to fly to a number of Brazilian cities.
- **KLM** is the only European airline that flies directly to Jakarta.

For the most part of the last 500 years, Poland had been a peripheral country. During the First Republic, our nobility was satisfied when Dutch merchants sailed not only to the Baltic Sea but also up the Vistula River into the heart of the country and paid for grain a year in advance. This set up allowed them to enjoy their golden freedom. During the partitions –when the modern industrial world was taking shape – and during the communist era, our capacity for action and development was severely stifled.

Today – thanks to favorable geopolitical conditions, as well as due to globalization and the technologies driving it – we are offered a historic chance to build Poland’s standing in countries

and regions far beyond our traditional sphere of influence.

Seizing this opportunity would naturally result in a stronger position for Poland within the European Union itself (we can expect various obstacles and delays from the largest countries of the old EU, reluctant to let a new player attain a position where it will have more say and sway).

Building the global position of a country, its people, and its companies is a long-term project with no expiry date. In Poland, however, our generation has the historic opportunity and potential to launch it and set the right pace.

## SUCCESS DEPENDS ON US

This journey should begin with our own mental shift, breaking out of stereotypes shaped by the past. Now is now, different from what was, and the future may increasingly depend on us alone.

If we can build a broad consensus across the political spectrum around the development strategy of our country and defend ourselves against hostile external influences, we will have opportunities unlike any we have seen in the past.



**Today, in 2026, we can and should look much further ahead, beyond the horizon shaped by our past experiences. The last 35 years have taught us to think on a European Union scale.**

**Now we must learn to think on a global scale. The invitation to the G20 is an inspiration to do just that.**



# WHAT KIND OF POLAND DO WE WANT IN 2050?

JOINING THE G20 IS NOT THE FINAL  
DESTINATION — IT IS THE BEGINNING



Michał Czarnik  
Maciej Wilk

**T**he question posed in the title is only seemingly simple. Today, it is difficult to find a convincing answer that would satisfy everyone. For a long time now, we have lacked a strategic goal that would capture the collective imagination, go beyond the horizon of the next elections, and provide the daily work of millions of Poles with a deeper meaning. Poland is developing economically—that is an undeniable fact—but despite this, it finds itself in a strategic drift. It is moving forward, still carried by the favorable winds of history, but without a clearly defined course. And that is our main problem today.

In the past, we have had grand, epoch-making objectives. First came the ambition to firmly anchor Poland within the Western security order through NATO membership. Then, accession to the European Union held the promise of a great civilizational leap and bridging development gaps between the East and West of the continent. For a moment, even hosting the European Football Championships served as such an aspirational benchmark. Each of these goals mobilized society in its own way. Each changed something within us. Since 2012, however, we have had no such goal. And its absence has gradually turned into a strategic drift.

Today we are delighted to have been invited to the G20 summit. Objectively speaking, this is a great honor for Poland—tangible proof that the Polish economy has become one of the largest in the world, surpassing the symbolic threshold of a trillion dollars in GDP. But let's be honest: the invitation to the G20 was not the result of a consistent, long-term national strategy. It was a stroke of luck. And waiting for strokes of luck is not a strategy.

Even if over the past 36 years we have achieved phenomenal economic success as a country, too many areas of the state—from the quality of institutions and public finances, through demographics, healthcare, and migration issues, to investment, energy, and infrastructure—remain far below the level one would expect from a member of the group of the world’s 20 most advanced economies. That is why we must not rest on our laurels. The road to greatness is still long and serious pitfalls lie ahead—including, in particular, the middle-income trap.

For this reason, the invitation to the G20 summit should be more than just a ceremony and a testament to our success. It must not become an excuse for complacency and letting our guard down but become a true turning point instead. It should serve as a springboard to the next stage of development; a moment when, as a nation, we consciously choose an ambitious direction for the next quarter-century and begin to consistently follow the path of our choosing.



Our objective cannot boil down to sheer presence in an elite club.  
**Our objective must be to build a country that will be much more than an economic leader—Poland should become one of the best places to live in Europe and the world.**

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As simple as that. Nothing else should be of interest to us. This is the great task of our generation. And we all, deep down, feel that we have the potential to make this vision a reality. However, it will not be possible without a coherent strategy.

In both business and public affairs, the starting point for formulating any strategy is always an honest and objective assessment of the current situation. Only by facing the truth and coming to terms with the facts—which are sometimes uncomfortable and contradict our preconceptions—can we set realistic long-term goals and devise methods for achieving them.

So what does a strategic assessment of Poland’s capabilities tell us on the eve of its entry into the G20? We will examine several key areas.

We are joining the G20 amid a growing constitutional crisis. The conflict surrounding the judiciary and its progressive dysfunction are leading to an increasingly ineffective law enforcement. Conflicts of competence among various centers of power are undermining the quality of state governance. Rankings assessing the rule of law and quality of institutions show Poland dropping to increasingly lower positions—we are now being overtaken by almost everyone in Europe except Hungary, Romania, and Türkiye.

Without political stability and an efficient judicial system, dynamic development is out of the question and our presence in the G20 will remain will remain superficial without yielding substantive results. Building strong institutions and an efficient justice system is within our reach—Lithuania and Estonia succeeded, so why shouldn't we? These countries understood that a state sticking to the rule of law attracts capital, gains citizens' trust and builds the foundation for lasting results.

**We are also joining the G20 amid a severe demographic crisis and with one of the lowest fertility rates not only in Europe but in the world.**

Without radical measures to reverse this trend, we simply risk exclusion from this elite group in a few decades  
– not only will our economy shrink, but so will the entire country.

Healthcare goes hand in hand with demographics. The percentage of GDP we allocate to healthcare is too low, and the number of doctors and nurses *per capita* is also among the lowest in Europe. It is therefore not surprising that the average life expectancy in Poland is about five years shorter than in the most developed countries. Yet, Poland has the potential to be a healthy nation with a long life expectancy. The Scandinavians have shown that money spent on healthcare and family policies is an investment with the highest possible rate of return. A healthy society works more productively, lives longer, and has more children. This is a flywheel that we must set in motion once again.

Migration is undoubtedly one of the greatest challenges of our time. Nonetheless, it also presents an opportunity to address the demographic gap that is widening right before our very eyes. This makes it all the more alarming that Poland has not yet developed a coherent migration policy capable of attracting people with the right professional and cultural backgrounds. We are not making sufficient use of the enormous potential represented by the 20-million-strong Polish diaspora scattered across the globe. In the long term, there is a real threat that we are on a path toward the same negative social phenomena observed today in many Western countries. And yet, proven models exist—such as the excellent, merit-based points system in place in Canada.

We also face a dire budgetary situation and one of the highest deficits relative to GDP in all of Europe. Without decisive action now, the threat of a debt crisis within just a few years is imminent. Assessments by the world's largest credit rating agencies are warning signals –a negative credit outlook does not materialize out of thin air. It is essential not only to control the spending but also to improve the quality of revenue. Poland has one of the most unfriendly tax systems among developed countries—according to the Tax Foundation, we rank 31st out of 38 countries surveyed in this category. At the same time, the VAT gap is nearly 1%, which means over 30 billion zlotys a year fall outside the budget, and the shadow economy accounts for nearly 10% of the whole Polish economy. In both of these areas, we rank near the bottom of Europe.

And yet, sound public finances and a simple tax system are not a pipe dream—they are a choice made by countries like Estonia and Ireland,

a choice that has resulted in spectacular growth. A state that simplifies rather than complicates, that rewards entrepreneurship rather than penalizes it—such a state attracts investment, retains talent, and generates true prosperity.

With an investment rate of 17% of GDP, again, we rank near the bottom in Europe. Not only does the Polish government fail to provide real incentives for citizens to invest, but it actually erects tax barriers to investment. As a result, instead of financing startups and the growth of innovative companies, Poles are investing their savings en masse in real estate—fueling a housing market bubble and making apartments in Poland among the least affordable relative to real wages. Thus, unlocking private investment emerges as one of the most important tasks for the Polish state in the coming decade—because no government measures can replace the energy and innovation that lie dormant in the Polish entrepreneurs. We must unleash these forces.



**Further development among the world's largest economies is also hard to imagine if we keep relying on the worst energy mix in Europe.**

The failure to even launch the construction of a nuclear power plant within 35 years of democratic Poland is a strategic mistake of fundamental importance. For our economy and the quality of life of our citizens, this failure will become not just like a ball and chain, but rather like concrete shoes in the face of growing EU climate requirements.

That is precisely why the construction of a nuclear power plant must become the state's top priority, carried out above and beyond political divisions and regardless of the electoral rhythm. It is the foundation of our energy security for decades to come. However, it's about more than nuclear. Instead of chasing after today's renewable energy technologies, Poland should rely on its own scientists and invest in the technologies of tomorrow—energy storage technologies, high-efficiency next-generation photovoltaics, and small modular

reactors (SMRs). The countries that develop and successfully implement these technologies will define the global energy order for decades to come. There is no reason why Poland could not be among the global leaders of this transformation.

However, the energy sector is not the only area where we clearly lag behind our own economic standing. While we have achieved spectacular success over the past three decades in building highways and expressways, in other areas of infrastructure—railways, ports, and airports—we are now paying the price for years of neglect. Since the transition to market economy, Poland’s railway network has shrunk by over 20%—from 24,000 to 19,000 kilometers—and the average Pole travels only about 750 kilometers by rail annually. This is half as much as the average resident of France or Germany.

Nearly 4 million citizens—as much as 10% of the population—complain of serious difficulties in access to public transportation. This is the fourth-worst result in Europe and a real problem that undermines country’s development prospects. Access to the rail network for residents of all counties should be treated not as an investment subject to standard profit and loss calculations, but as a civilizational standard that a G20 country is obligated to provide for its citizens.

A well-developed road network, an efficient railway system, inland waterway transportation, deep-water container terminals and a world-class airport hub—these are the hallmarks of top-tier countries. Unfortunately, in most of these areas, after years of neglect, we are currently playing catch-up with the project of the Polish Centralny Port Komunikacyjny as the prime example.

**However, the debate on the CPK in 2024 exposed a deeper problem than sheer infrastructure deficiencies.**

**It exposed a certain flaw in the mindset of some elites who consider ambition a bad thing, see aspirations as “megalomania”, and look at large-scale projects like they were nothing but large problems.**

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This is a minimalist line of thinking. It is the mindset of a colonial country that does not feel entitled to lead the pack. It is likely for these same reasons that Poland lags far behind in terms of its actual impact on the global politics and world culture.

**Although we are now the world’s 20th-largest economy, we rank only 31st in terms of soft power.**

However, complaining is not the purpose of this analysis. Its purpose is to demonstrate that Poland, invited to the G20 summit, is a country failing to fully utilize its potential. The difference is fundamental. When identifying the weaknesses, one thing must be kept in mind: today is not a good time for complacency. Every year of continued strategic drift is a wasted opportunity that we will never get back.

But there is also another side to this equation.

**We have an educated, hardworking and resourceful society.**

Our location in the heart of Europe – which for centuries had been a curse, not a blessing—is our greatest asset today. **We have an economy whose value has just surpassed one trillion dollars.** We have everything we need for success, except for two things: this inner conviction we can achieve true greatness, and leadership that will inspire society with this vision and turn this ambition into reality.

It is high time to change this.

## WHAT SHOULD POLAND BE LIKE IN 2050?

- 1.** It should be a country young people not only want to stay in, but also flock to from other parts of Europe and the world—because **they know they won't find a better place.**
- 2.** It should be a country that **no longer chases after the West**, because from its perspective, the West has long since ceased to be any kind of benchmark.
- 3.** It should be a country that has transitioned from purposeless drifting to real greatness—and **that remembers it all began with the courage** to consciously choose that path.

# APPENDIX

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## RECOMMENDATIONS BY “IDEAS FOR POLAND” 2025 FORUM

The “Ideas for Poland” Forum is the flagship conference organized annually by the Sobieski Institute, where representatives of government, business, politics, and academia gather to exchange views on the latest trends in the economy, technology, and domestic and global politics.



Each conference concludes with the development of a set of practical recommendations by the participants. These recommendations generally concern what Poland can and should do, rather than what the G20 (or even Poland through its presence in the G20) should do. Nevertheless, we realized that should Poland truly aspire to achieve the efficiency and effectiveness that would qualify the country to a more frequent and regular participation in forums such as the G20, a large portion of these recommendations is worth considering and should therefore be included in the report as a short appendix.

We are including only a selection of them here; please visit [www.sobieski.org](http://www.sobieski.org) for the full list.

POLITICAL DEBATE:

**A SHOCK-RESISTANT ECONOMY: ERA OF THE “CHEAP”  
IS GONE –WHAT COMES NEXT?**

Poland’s “economic miracle” needs further breakthrough measures in order to continue –ranging from political consensus to specific modifications to the economic model. The prospect of economic slowdown in Europe looming on the horizon, combined with the war just across our eastern border, raises the question: how can we stay on the path to success while navigating these treacherous waters?

**RECOMMENDATIONS:**

- 1.** Effective methods must be developed to support Polish businesses at the national, EU, and global levels.
- 2.** A cross-party public discussion on specific issues is needed to create a coherent national strategy on key aspects.
- 3.** We must put an end to social polarization so that we can implement projects more effectively and quickly.
- 4.** As Poland, we must make a leap forward by transitioning from a model based on imitation to a state that shapes reality in an active manner.
- 5.** Our raison d’état is not to end the war in Ukraine, but to end the war in a way that will prevent the Russian Federation from threatening Poland.

## THE NON-EUROPEAN WORLD



### RECOMMENDATIONS:

- 1.** It is important to increase Polish investments in the African raw material markets, especially in critical and strategic metals segment, essential for a modern economy.
- 2.** It is essential to develop projects aimed at reindustrialization, i.e. restoring and modernizing production facilities with the involvement of Polish experts, while simultaneously training and hiring local staff to enhance the sustainability of the investment.
- 3.** It is very important to promote the transfer of technology and *know-how*, particularly in the metallurgical and steel sectors, including the implementation of modern ESG standards and transparent production processes.
- 4.** Poland should support innovative solutions for monitoring and certifying raw materials, such as blockchain technologies, to increase the transparency and security of the supply chain.

PANEL:

**ECONOMY IN THE SHADOW OF WAR:  
CIVIL DEFENSE AND THE DEFENSE INDUSTRY**

**RECOMMENDATIONS:**

- 1.** Treat security as a process involving the entire state, not just the armed forces.
- 2.** Ensure continued provision of key public services (energy, health, transportation) in crisis situations.
- 3.** Integrate the economy with the security system, moving away from their current separation.
- 4.** Establish a stable legal and organizational framework for businesses during times of crisis and war.
- 5.** Identify and organize business resources so that the government knows what it actually has at its disposal.
- 6.** Strengthen the protections of energy and critical infrastructure against hybrid attacks.

PANEL:

**IS CAPITAL IN RETREAT OR ON A NEW PATH?  
THE FUTURE OF INVESTMENT IN CENTRAL EUROPE**

**RECOMMENDATIONS:**

Central Europe is characterized by dynamic growth, social stability, and rising domestic consumption. These strengths should be consistently promoted on the international stage, emphasizing that the region is a stable, predictable, and profitable destination for capital allocation.

PANEL:

**CRITICAL TECHNOLOGIES**

**RECOMMENDATIONS:**

- 1.** Develop long-term **strategic development plans** for critical technologies.
- 2.** **Focus public resources** on a few selected key technologies.
- 3.** Treat **critical technologies as an element of national security**.
- 4.** Establish a **National Cybersecurity Center**.
- 5.** Draw a **precise list of critical infrastructure**.
- 6.** Improve **the enforcement of existing cybersecurity laws**.
- 7.** **Support Polish technology companies** and reduce dependence on imports.
- 8.** Make government **the primary customer** for **Polish innovations**.
- 9.** **Invest in the development** of AI, SMRs, the Polish cloud, communication systems (including space-based systems), and electronic components.
- 10.** **Increase R&D spending to 3% of GDP** and support the training of specialists in selected key technologies (see point 2).

## ABOUT THE AUTHORS





### **Michał Czarnik**

Expert in commercial law, tax law, and infrastructure. Legal counsel and tax advisor; graduate of the Faculty of Law and Administration at Warsaw University and the Center for American Legal Studies at the University of Florida. Managing Partner and Partner at the law firm CW Legal. Vice President of the Board of the TakDlaCPK Association. Arbitrator at the Arbitration Court attached to the General Prosecutor's Office of the Republic of Poland. For over twenty years, he has been advising on commercial and tax law, participating in major restructuring and transaction processes. He has extensive experience representing corporate clients in court and during arbitration disputes. He served as President of the Arbitration Court at the Office of the Prosecutor General of the Republic of Poland.

From 2018 to 2022, he served as Executive Director of Centralny Port Komunikacyjny sp. z o.o. and Deputy Program Manager of the CPK.



### **Krzysztof Domarecki**

Krzysztof Domarecki – entrepreneur, founder, and majority shareholder of the Selena Group, a global manufacturer of construction chemicals. A graduate of the Faculty of Law at the University of Wrocław, he also studied philosophy. From 1983 to 1991, he worked as a researcher at the University of Wrocław, focusing on issues related to the judiciary and the presidential system. In the 1990s, he launched the Tytan brand and built a nationwide distribution and sales network. Since 2009, as an investor, he has been actively involved in the venture capital market. Through the Fidiasz FIZ fund, he supports the development of innovative companies, offering them both financing and substantive support. For his work, he has been honored with, among others, the “Bene Merito” Medal and the Medal of the Centenary of Regained Independence. He is the recipient of numerous awards, including “Polish Hercules 2021,” “Vector 2017,” and a distinction in the “Entrepreneur of the Year” competition in the social responsibility category.



### **Jadwiga Emilewicz**

Member of the Board of the Sobieski Institute, expert on the economy and energy policy. Manager with 20 years of experience in managing multidisciplinary teams in an international environment. Between

2015–2023, she held senior government positions, including the position of the Deputy Prime Minister and Minister of Entrepreneurship and Technology. She coordinated the preparation of the Anti-Crisis Shield supporting 347,000 enterprises and co-authored Poland's energy transition plans. She also served as the government's plenipotentiary for Polish-Ukrainian development cooperation.

A graduate of the Jagiellonian University and IESE Business School in Barcelona. A scholarship recipient at Oxford University. Lecturer at Adam Mickiewicz University in Poznań.



### **Radosław Pyffel**

Member of the Board of the Sobieski Institute and an expert on international politics and Asia. Previously, among other roles, a member of the Board of Directors of the Asian Infrastructure Investment Bank (AIIB) in Beijing representing the Republic of Poland (2016–2018) and a representative of the PKP Cargo Management Board for non-European markets (2018–2020). A graduate of sociology at the University of Warsaw, he was nominated for the President of the Polish Academy of Sciences Award and received a scholarship from the Polish Ministry of Education to study at leading Chinese universities, including Sun Yat-sen University in Guangzhou (广州中山大学) and Peking University (北京大学). Recipient of a language scholarship he also studied in Taiwan. Representative of numerous Polish and European companies in Asian markets. University lecturer and author of many educational programs and books on China and Asia. Commentator on international politics in new and traditional media.



### **Dr Agnieszka Rymsza**

Sociologist, expert on international relations, public policy, and non-governmental organizations. Political and Economic Advisor and Deputy Ambassador at the Embassy of the Republic of Poland in Buenos Aires (2020–2024). Advisor to the Secretary of State and Government Plenipotentiary for Civil Society and Equal Treatment, and Deputy Director of the Department of Civil Society at the Chancellery of the Prime Minister (2016–2019).

A researcher and educator, she has developed public policy recommendations and co-authored legal regulations and programs supporting non-governmental organizations and people with disabilities. Author of the book *\*Lost Identity? A Comparative Analysis of the Non-Governmental Sector in Poland and the United States\** and other publications on the non-governmental sector, public policy, social entrepreneurship, and social capital. A graduate of sociology from the Faculty of Philosophy and Social Sciences at Warsaw University and the School of Social Sciences at the Institute of Philosophy and Sociology of the Polish Academy of Sciences. She also studied at Georgetown University in Washington, D.C., Manchester University in the United Kingdom, and the University of Cambridge. In 2019, she completed the prestigious ARGO TOP Public Executive course for senior management in public administration, conducted by IESE Business School (University of Navarra) in Spain in cooperation with the National School of Public Administration.



### **Leszek Skiba**

Chairman of the Board of the Sobieski Institute. Economist and civil servant. Deputy Minister of Finance and Chief Ombudsman for Public Finance from 2015 to 2020. Subsequently, Chairman of the Board of Pekao SA (2020–2024). He specializes in macroeconomics, public finance, and the banking sector. From 2009 to 2015, he worked at the National Bank of Poland (NBP) in the Office for Integration with the Eurozone, where, among other things, he contributed to the report *Economic Challenges of Poland's Integration with the Eurozone (2014)*. He has been associated with the Sobieski Institute since 2009.



### **Maciej Wilk**

From 2013 to 2023, he worked at LOT Polish Airlines, where since 2018 he held the position of the Chief Operating Officer (COO). In May 2023, he began working in the same role for the Canadian airline Flair, and in July 2024, he assumed the position of Chief Executive Officer (CEO). In February 2024, Wilk co-founded the #TAKdlaCPK association and remains its president to this day. President of the Polish Development Foundation.

# ABOUT THE PUBLISHER





**The Sobieski Institute** is a Polish private think tank whose mission is “Creating ideas for Poland.” It was registered in 2005 as a foundation, having began its activities in 2003. Between 2003 and 2010, the Institute published “Międzynarodowy Przegląd Polityczny”, a quarterly. From 2011 to 2015, it organized the annual “Poland – The Great Project” congress. In 2017, it organized the National Innovation League. Since 2017, the Institute has placed strong emphasis in its activities on publishing studies and recommendations aimed at demonstrating how the Polish economy should capitalize on the opportunities associated with the Fourth Industrial Revolution, innovation, and new technologies.

The Sobieski Institute also conducts educational activities through the "Academy of Young Experts" project, which supports young people in developing leadership skills and soft skills. Each edition of the program focuses on a different key issue, addressing the current needs of the younger generation. Currently, during its 6th edition, the project focuses on European Union, imparting knowledge and preparing participants to take part in European Personnel Selection Office (EPSO) competitions. The program opens the door for its participants to international careers in the EU institutions. It is a unique opportunity to gain practical skills and pursue professional development at the highest level.

One of the Sobieski Institute’s latest projects is the “Sobieski Channel,” which we invite you to subscribe to on YouTube. The channel was created to feature inspiring conversations on topics important for Poland. We meet with interesting personalities there to foster space for substantive debate in a joint effort.

Over the years, the Sobieski Institute has collaborated with many organizations. To date, these have included:

- non-governmental organizations: Polish Automation and Robotics Forum, Mutual Insurance Support Foundation, Republican Foundation, Jagiellonian Institute, New Confederation, Ambitious Poland, Youth for Poland, Students for the Republic, Konrad Adenauer Foundation, Central European Energy Partners, Sławomir Skrzypek Foundation, Wacław Felczak Foundation, Institute for Foreign Affairs and Trade (Külügyi és Külgazdasági Intézet), Institute for Politics and Society (Institut pro politiku a společnost), The F. A. Hayek Foundation Bratislava;
- commercial companies: Aiut, Assay Group, Rohde & Schwarz, WB Electronics, Asseco, Samsung, Lotos, Google, Procter & Gamble, PwC, Cisco, EY, Phoenix Systems, Uber, USP Zdrowie, Fortum, Orange, Energa, Zysk i Ska, Collegium Wratislaviense, 4CF;
- Government/supranational institutions: Ministry of Foreign Affairs, European Commission Representation in Poland, Ministry of Climate and Environment, Industry of the Future Platform Foundation, Agency for Development and Industry, Warsaw Stock Exchange, Bank Gospodarstwa Krajowego, Chancellery of the Prime Minister, Ministry of Digital Affairs, Law and Justice, Embassy of Hungary, Senate of the Republic of Poland, European Conservatives and Reformists Party, European Parliament Office in Poland.

A complete list of reports and publications, as well as information about the Institute’s activities, can be found at [www.sobieski.org.pl](http://www.sobieski.org.pl).






We also invite you to subscribe to the Sobieski Channel on [youtube.com/kanalSobieski](https://youtube.com/kanalSobieski). Join us—it’s worth it!



When working on the report.

Standing from left: Leszek Skiba, Krzysztof Domarecki, Agnieszka Rymcza, Jadwiga Emilewicz, Radostaw Pyffel.



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