



Poland: The State of Quantum Computing -- August 2025

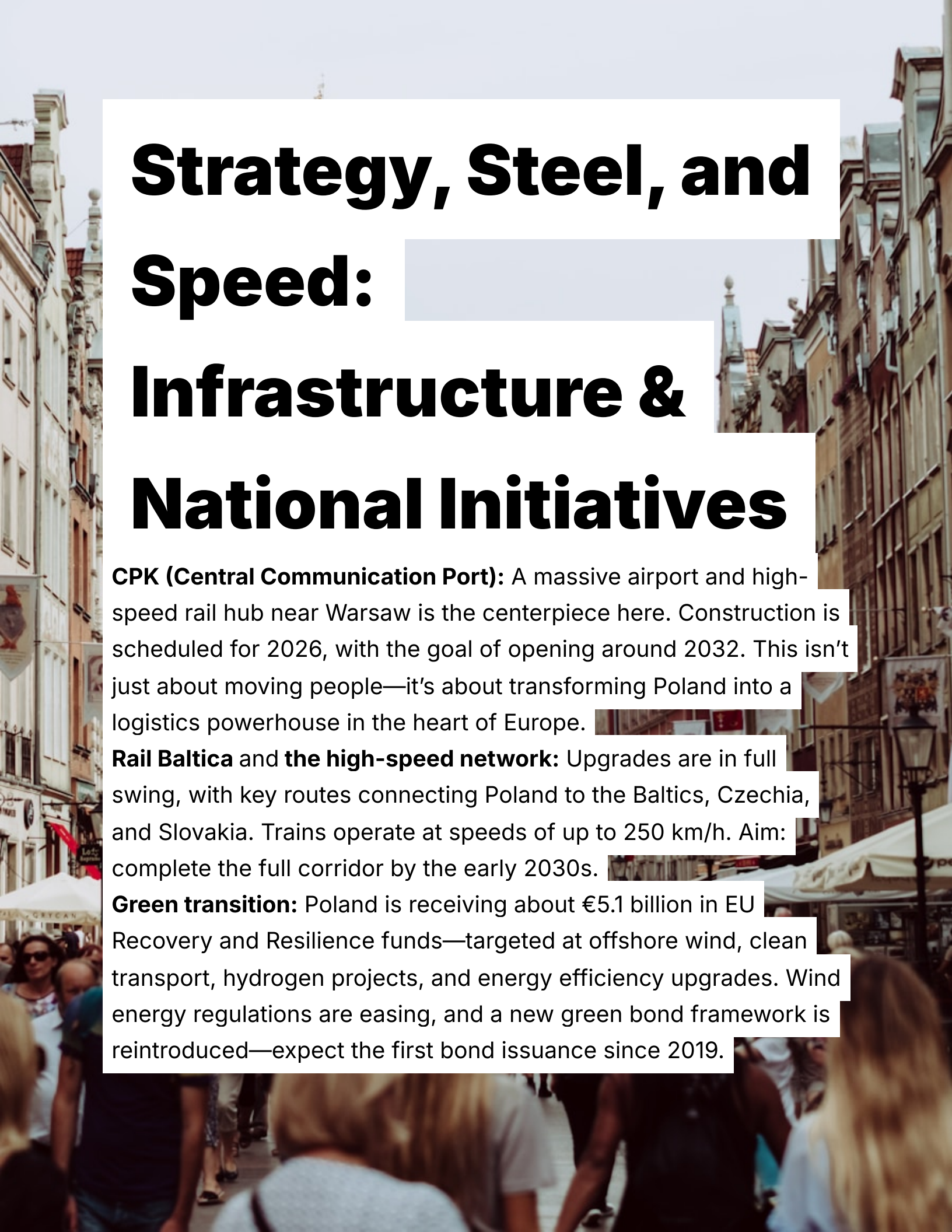
Executive Summary

Mid-2025, Poland is in an ambitious, future-oriented phase. Economic growth is outperforming the regional average—around 3.3–4%—and the country is channeling this momentum into a large 650 billion PLN (\$160 billion) investment initiative.

The focus? Core infrastructure, defense modernization, green energy, and digital transformation.

Defense spending is increasing to 4.7% of GDP in 2025—the highest in NATO. This includes F-35s, Abrams tanks, and expanded domestic weapons development. Under Prime Minister Donald Tusk, Poland's governing coalition is engaging in a strategic modernization effort, strengthening the country's ties within the EU and regional partnerships.





Strategy, Steel, and Speed: Infrastructure & National Initiatives

CPK (Central Communication Port): A massive airport and high-speed rail hub near Warsaw is the centerpiece here. Construction is scheduled for 2026, with the goal of opening around 2032. This isn't just about moving people—it's about transforming Poland into a logistics powerhouse in the heart of Europe.

Rail Baltica and the high-speed network: Upgrades are in full swing, with key routes connecting Poland to the Baltics, Czechia, and Slovakia. Trains operate at speeds of up to 250 km/h. Aim: complete the full corridor by the early 2030s.

Green transition: Poland is receiving about €5.1 billion in EU Recovery and Resilience funds—targeted at offshore wind, clean transport, hydrogen projects, and energy efficiency upgrades. Wind energy regulations are easing, and a new green bond framework is reintroduced—expect the first bond issuance since 2019.

Public–Private Collaboration & Brainpower

The **Polish Development Fund (PFR)** acts as a matchmaker between public capital and private innovation—investing in everything from energy transition to military-industrial growth. A new 2025 deal with Google and OChK is expected to strengthen Poland’s tech and startup scene.

AI policy? It’s more than just slogans. The Polish Economic Institute is shaping it around three pillars: developing a homegrown tech stack, boosting AI-driven exports, and implementing AI in public service areas. It’s a blend of academia, industry, and government working together.

Meanwhile, reforms in capital markets are removing bureaucratic obstacles to support SMEs, attract venture and private equity, and enhance the global reputation of the Warsaw Stock Exchange.



Diplomacy, Defense, and Regional Reach

Poland assumed the **EU Council Presidency** in early 2025, leveraging the position to advance digital and AI governance across the bloc.

It is also advocating for increased EU defense funding—aiming to use approximately €6 billion in COVID-era recovery funds for national security, industrial upgrades, and cyber defenses. The goal is to reach decisions by mid-2025, with legislation expected to roll out in the fall.

Through the **Three Seas Initiative (3SI)**, Poland hosted the 2025 summit in Warsaw and welcomed Albania and Montenegro as new partners. The Initiative is directing up to €100 billion toward regional transportation, energy, and digital infrastructure.





On the G7 stage, Poland supported global tax harmonization efforts and increased defense spending after the NATO summit in The Hague. There's talk of an EU rearmament bank—an idea Poland strongly backs as part of its larger strategic plan.

Opportunities vs. Growing Pains

Opportunities:

- Infrastructure investments (CPK, high-speed rail, clean energy) are building economic muscle and regional resilience.
- The tech and AI ecosystem is catching its stride—Poland's got the talent, the policy will, and international interest.
- Poland's position as a regional leader—both in the EU and 3SI—is becoming more solid, especially in energy security and cross-border infrastructure.



Challenges:

- Domestic politics still tangle up the energy transition—coal vs. wind is far from settled.
- Defense spending at 4.7% of GDP is bold, but it could pinch public finances if growth cools.
- Regional disparities remain sharp—urban centers thrive while rural areas risk further decline, potentially pushing out young talent.



Outlook: End of 2025 & Beyond

By year's end, Poland is expected to hit key milestones: green bond issuance, new digital governance laws, and formal defense funding frameworks. Early infrastructure work on CPK and high-speed rail will start to become visible.

Growth may ease slightly into 2026 (EBRD forecasts around 3.2–3.5%), but with diversified investment across defense, green tech, and logistics, the fundamentals remain strong.



Final Reflection

Poland in 2025 is shifting gears—moving from a fast-growing, consumption-driven economy to a regional leader focused on sovereignty, strategy, and smart investments. It's a delicate balance: political turbulence, energy transition challenges, and budget pressures all persist. However, with EU alignment, regional leadership through 3SI, and proactive capital strategies, Poland is establishing a resilient, tech-savvy, and strategically critical role in Europe's future.

