Estonian Priority Projects in the Three Seas Initiative 2018–2024

The aim of the article is to introduce the Estonian priority projects submitted under the Three Seas Initiative (3SI), in the period 2018–24, and to answer the research question: whether there is a convergence between the assumptions of the Estonian priority projects and the strategic objectives of the Initiative, which are: improvement in the area of economic growth, digitalization, well-being in the region and rise of its attractiveness and competitiveness in the European and global scale, as well as improving energy security and realizing of European Union's climate goals and defending geopolitical interests of the region. Political elites of Estonia, believe that the 3 SI project can be complementary and beneficial for both: the Initiative's member states and the European Union. Estonia sees diplomatic potential in the Initiative too, also in terms of building good relations in the region and is very committed to developing the formal institutional structure of the project. The Estonian 'interconnection priority projects', especially in the areas of digitalization, energy and transport, are seen as a tool to expand modern components in key infrastructure, which in turn will support new business models and technologies in the 3SI region.

K e y w o r d s: Estonia, Three Seas Initiative, priority projects, LNG Terminal Paldiski, PHAES, Rail Baltica, Smart Connectivity, Via Baltica.

Studia Polityczne 2025, vol. 53, no. 1
ISSN 1230-3135
DOI: 10.35757/STP.2025.53.1.08

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ESTONIAN PRIORITY PROJECTS IN THE THREE SEAS INITIATIVE 2018–2024

INTRODUCTION

Estonia's involvement in the Three Seas Initiative (3SI) has been perceived on occasion, as an indication of a potential shift in the country's post Cold-War foreign policy strategy, with some observers viewing it, as a signal of the more significant change of course. Estonia's relations with the countries of the post-Soviet bloc and even the Baltic region, have not thus far been overly close, and Estonia has generally sought to avoid membership in Eastern European regional groupings.[1] Consequently, the 3SI is regarded as an exceptional instrument for reinforcing these relations. Furthermore, the inspirations and involvement of the United States (US) in the implementation of the Initiative (particularly evident, during the presidency of US president—Donald Trump in period 2017–21) was of great significance to Estonia, given that the US is Estonia's most crucial partner, particularly in matters of security.[2] Consequently, Estonia also views its involvement and activities within the Initiative as means of reproachment, not only with the countries of the region,

[1] Republic of Estonia, *Estonian Foreign Policy Strategy 2030* (Tallinn: Ministry of Foreign Affairs, 2020), p.16; Piret Kuusik, *How Does the Three Seas Initiative Help Estonia?*, Commentary, International Centre for Defence and Security Estonia, 13 November 2020, https://icds.ee/en/how-does-the-three-seas-initiative-help-estonia/ (access: 24 May 2024).

[2] Marek Górka, 'The Three Seas Initiative as a Political Challenge for the Countries of Central and Eastern Europe', *Politics in Central Europe* 14: 3, 2018, p. 56, https://doi.org/10.2478/pce-2018-0018.

but also with its significant Atlantic partner.[3] It is noteworthy that Estonia's principal strategic orientation is towards the West in the broadest sense, with Germany and the European Union, in addition to United States, representing its most significant partners.[4] From the perspective of Estonia's foreign policy, one of the most problematic potential outcomes of such alliances, is the divergence of intentions and the possibility of conflict between European and Atlantic partners. Estonia's involvement in 3SI is viewed favourably by the political elite, but is met with scepticism by researchers, who believe that participation in the Initiative could result in a weakening of the state's relations with EU, Germany and China, particularly in the context of the crisis of cooperation within the 17+1 group.[5] Nevertheless, it is evident that Estonia continues to be one of the most engaged and dedicated members of the Initiative, despite of the aforementioned, peculiar two-voice between political elite and researchers.[6] Estonia's approach to its involvement in the Initiative and its relationship with the EU is notably distinctive. Indeed, Estonia holds the view that 3SI project can be regarded as a perfectly complementary and beneficial addition to the activities of both: the Initiative member states and the EU. Furthermore, Estonia is eager to facilitate the development of regional infrastructure, particularly in the digital domain, as it believes that this will stimulate economic growth across the region.[7] Of particular interest to Estonia, is the 3SI agenda of the so-called 'interconnection priority projects'. These elements of the Initiative's activity, particularly in the areas of transport, energy and digitalisation, are regarded as a means of extending modern components into key infrastructure, thereby supporting the emergence of new business

[3] Ibid.

[4] Valerie Kornis, *Estonia's Perspective on the Three-Seas Initiative. Interview with Kaisa Hanna Parel*, Friedrich Nauman Foundation for Freedom, 21 February 2022, https://www.freiheit.org/central-europe-and-baltic-states/estonias-perspective-three-seas-initiative (access: 25 May 2024).

[5] Illimar Ploom and Viljar Veebel, 'Estonia: The Increased Focus on Geopolitics after Russia's Invasion in Ukraine', in Andris Sprūds and Mārtiņš Vargulis, eds, *Three Seas Initiative Mapping National Perspectives* (Riga: Latvian Institute of International Affairs, 2022), pp. 73–74.

[6] More about Estonian ideas of 3SI: Ploom and Veebel, 'Estonia', pp. 71–80; Kornis, *Estonia's Perspective on the Three-Seas Initiative*; Agnieszka Legucka and Agnieszka Orzelska-Stączek, 'Estonia's Vision of the Three Seas Initiative Interview with The Ambassador of Estonia to Poland H.E. M. Roger, 10 September 2020', *Sprawy Międzynarodowe* 73: 2, 2020, pp. 13–21, https://doi.org/10.35757/SM.2020.73.2.13; Stefan Thompson, *Three Seas Talks—H.E. Tiit Riisalo, Estonian Ministry of Foreign Affairs*, Institute of New Europe, 3Seas Think Thank Hub, Podcasts, 22 March 2023, https://ine.org.pl/threeseasinitiative/podcasts/three-seas-talks-12/ (access: 25 May 2024).

[7] Kornis, *Estonia's Perspective on the Three-Seas- Initiative*.

models and technologies. These include a smart grid, compatible with renewable energy sources, real-time economic management, smart transport and logistics management.[8]

The objective of this article is to present the Estonian priority projects submitted under the Three Seas Initiative for the period 2018–24 and to respond to the research question of: whatever there is a convergence between the assumptions of the Estonian priority projects and the strategic objectives of the Initiative.[9]

3SI PRIORITY INTERCONNECTION PROJECTS

One of the principal outcomes of the third Three Seas Initiative Summit, held in Bucharest in 2018, was the development and approval at the highest political level the list of so-called 'priority interconnection projects' in the focus areas of the Initiative, namely: digitalisation, energy and transport infrastructure. These areas are also of particular importance for the Estonian foreign policy strategy.[10]

In its original version in 2018, the catalogue comprised 48 priority projects from 3SI member states.[11] These projects align with the needs and priorities of the countries that proposed them and are most pertinent to the region's development. Consequently, projects constitute a substantial contribution to the principal objective of the 3SI, namely the establishing of more robust security and connectivity in the region and with the remainder of Europe. The objectives of the priority projects implementation are twofold: firstly, to achieve the primary goals of the Initiative as a regional organisation, secondly, and most importantly, to meet the development needs of each member state.[12] It was anticipated that the priority projects would have a significant impact on the member states' economic growth, both in terms of the tangible benefits that would accrue to them, and in terms of the geopolitical dimension that was related to the security

[8] Ibid.

[9] Giovanni Neri, *Discovering the Benefits: How the Three Seas Initiative Empowers the Baltic States*, Warsaw Institute, 14 May 2024, https://warsawinstitute.org/discovering-the-benefits-how-the-three-seas-initiative-empowers-the-baltic-states/ (access: 19 June 2024).

[10] Republic of Estonia, *Estonian Foreign Policy Strategy 2030*, p. 16.

[11] The Three Seas Initiative, *Priority Interconnection Projects. 3 Seas Initiative Summit, Bucharest 17–18 September 2018* (Bucharest: The Three Seas Initiative, 2018), pp. 1–160.

[12] 3 Seas Initiative Summit, *2018-Bucharest Summit*, http://three-seas.eu/2018-summit/ (access: 20 May 2024); Three Seas, *Status Report 2024*, https://projects.3seas.eu/report (access: 20 May 2024).

and development of the North-South corridor concept, levelling of disparities in regional development and fostering cohesion.[13] It is noteworthy that the inaugural 3SI Business Forum was held in the context of the Bucharest Summit in 2018, with the support of the President of Romania. The 3SI Business Forum saw the participation of over 600 officials and business representatives from the participating states, other EU member states, non-EU countries from the Southeast Europe region (Georgia, Moldova, Ukraine, Turkey, Western Balkans states) and the United States.[14] At the inaugural Business Forum, financial institutions expressing interest in such idea, signed a Memorandum of Understanding to establish the Three Seas Initiative Investment Fund.[15] The objective of the Fund is to provide support and finance for priority connectivity projects, as well as other future Three Seas Initiative projects. The Fund was officially registered on 29 May 2019 in Luxemburg. Its creators were Polish national development bank—Bank Gospodarstwa Krajowego (BGK) and Romania's national EximBank, which also became the inaugural investors. To date, the Polish BGK has made the largest contribution, amounting to EUR 750 million. On 16tApril 2020, Estonia became third member on the Fund, contributing EUR 20 million.[16]

The inaugural edition of the 3SI Business Forum in Bucharest established a framework for discussing the list of major interconnection projects. Additionally, the Forum, designed as recurring event, was also intended to facilitate the monitoring of the evolution and progress of the priority projects.[17] Priority projects are expected to have a significant impact on the entire region or substantial number of participants and should demonstrate a high degree of feasibility. Priority projects encompass multilateral projects, as well as bilateral initiatives and national programs that possess international potential and impact.[18] The criteria that priority projects should meet, include the following categories:

[13] Three Seas Summit, Vilnius, Lithuania 2024, *Priority Projects*, https://3seas.eu/about/progressreport (access: 20 May 2024).

[14] Three Seas Summit, Vilnius, Lithuania 2024; *Past Summits*, Bucharest Summit 2018, https://3seas.eu/about/past-summits/bucharest-summit-2018 (access: 20 May 2024). 3 Seas Initiative Summit, *2018-Bucharest Summit. Business Forum*, http://three-seas.eu/business-forum/ (access: 21 May 2024).

[15] Republic of Estonia, Ministry of Foreign Affairs, *Three Seas Initiative*, https://vm.ee/en/international-relations/regional-cooperation/three-seas-initiative-3si (access: 22 May 2024).

[16] Ibid.

[17] 3 Seas Initiative Summit. *2018-Bucharest Summit, Business Forum*.

[18] Ibid.

1) The considerable impact of the projects on the Three Seas region.

2) The alignment with the priorities and policies of the European Union.

3) The minimum number of countries involved in a project should be three, of which at least two should be situated in the Three Seas region.

4) Projects may involve countries that are not members of the Initiative but are geographically proximate to the region.

5) Bilateral and individual projects are considered on an exceptional basis, if they address critical gaps in the region's major development projects.

6) Priority projects may be either: new or already existing ones, that are currently in the implementations phase.

7) Priority is given to the projects that are already on the priority list under the EU programmes.

8) These should be projects that incorporate innovative, safe and sustainable new technologies and/or aim in upgrade existing infrastructure.[19]

The advancement of priority projects is documented on an annual basis and presented at the annual Three Seas Initiative Summits. The last *Status Report 2024*, presented in connection with the Initiative's Summit in Vilnius, Lithuania, in April 2024, provides a comprehensive overview of the implementation and financing status of all 3SI projects, which currently comprises 143 ideas.[20] Amongst them, 89 were identified as priority interconnection projects, with an estimated value of EUR 102,3 billion. It was noted that 40% of the required funds has already been secured.[21] The distribution of funding sources for the priority projects is based on the following scheme: 26% form national sources and the Connecting Europe Facility (CEF) each.[22] Additional

[19] Ibid.

[20] Three Seas, *Status Report* 2024.

[21] Ibid.

[22] It is worth recalling that CEF represents a financial instrument that builds upon the concept initially proposed in the 2014–20 EU budgetary perspective. It is designed to support the modernisation and construction of infrastructure within the Trans-European Transport Network (TEN-T) for the period 2021–27. The present iteration of the programme is designed to facilitate the creation of infrastructure that adheres to uniform technical and functional standards. It places a particular emphasis on the development of cross-border connections and the remediation of existing network deficiencies, in addition to the implementation of climate-smart measures. European Commission, European Climate, Infrastructure and Environment Executive Agency, *Connecting Europe Facility*, https://cinea.ec.europa.eu/programmes/connecting-europe-facility_en (access: 20 May 2024).

sources of funding are as follows: The European Investment Bank (EIB) and the Three Seas Initiative Fund—each account for 8% of the total, while European Union funds provides 12% and the European Bank for Reconstruction and Development (EBRD) 4%. The remaining 16% is derived from other sources.[23] Of the priority projects, the largest proportion is accounted for by transport infrastructure designs: 48%. Most of the others priority projects, accounting for 37% of the total number, are related to energy infrastructures. A further 15% of projects are concerned with digitalisation. The status of the current priority projects in 2024 was as follows: 14 have been completed, 19 have made significant progress, 13 have reported activities and 43 have been registered.[24]

ESTONIAN PRIORITY INTERCONNECTION PROJECTS 2018–2024

In the case of Estonia, the number of notified projects included five initiatives.[25] All of them have been designated as priority projects and were duly notified in 2018, during 3SI Bucharest Summit.[26] The catalogue of priority projects in Estonia encompasses a range of energy and transport infrastructure initiatives, including:

1) The establishing of the regional LNG terminal in Paldiski, Estonia.

2) Construction of the 500 MW Estonian Pumped-Hydro Energy Storage Facility.

3) The integration and synchronisation of the electricity systems of the Baltic States with those of the European networks.

4) Rail route—Rail Baltica.

5) Road route—Via Baltica.[27]

On the aforementioned projects, the status of the one that has been already completed, has the commissioning of the Paldsiki regional LNG terminal. Consequently, the article will devote a greater degree of attention to this project.

The idea of the regional LNG terminal in Paldiski was initially proposed by the Republic of Estonia, with the participation of the

[23] Three Seas, *Status Report 2024*.
[24] Ibid.
[25] Republic of Estonia, Ministry of Foreign Affairs, *Three Seas Initiative*.
[26] Three Seas Summit, Vilnius, Lithuania 2024.
[27] Ibid.

Republic of Finland, as an external partner form outside the 3SI. However, during the project's implementation, another participant among the countries involved in the Initiative, namely Republic of Latvia, decided to join in venture.[28] The project was scheduled to run from the third quarter of 2018 to the end of 2024, with an initial budget of EUR 344 million. At the time of notification, the financial gap was estimated at EUR 123 million.[29] The final investment was valuated at EUR 400 million.[30] The project contractor was to be primarily Balti Gas, a subsidiary of the Estonian company—Alexela Group. The project's objective was to ensure diversification and long-term security of gas supplies to the Republic of Finland and the Baltic States, while offering the most competitive terms as possible. Additionally, it aimed to provide access to global LNG markets, enhance competitiveness and promote the use of gas as an alternative energy source in maritime transport and other sectors.[31] The preliminary cost-benefit analysis of a prospective the Paldiski LNG terminal indicates, that during the initial 15 years of its operational phase, it would bring about EUR 1 billion in socio-economic advantages for the participating states, including GHG emissions reduction.[32] A crucial objective of the project was to mitigate the energy dependence of the Baltic States on the Russian Federation. Nevertheless, the establishment of such installations is impeded by several factors, including a lack of absorptive capacity in the market and a dearth of financial resources. Furthermore, the Baltic Sea is a particularly protected body of water and vessels are only permitted to operate on low-sulphur fuel. Furthermore, the implementation of more stringent International Maritime Organization (IMO) regulations may render the utilisation of existing fuel sources, including LNG, less economically viable.[33]

The most feasible location for a regional LNG import terminal was identified as the Balticconnector (gas interconnector between Estonia and Finland) landfall point, situated near the existing and future regional Baltic gas market. This conclusion was reached, based on

[28] Three Seas, *Projects*, *Commissioning of the Regional LNG Terminal Reception Readiness in Paldiski*, https://projects.3seas.eu/projects/commissioning-of-the-regional-lng-terminal-reception-readiness-in-paldiski (access: 20 May 2024).

[29] The Three Seas Initiative, *Priority Interconnection Projects*, p. 101.

[30] Three Seas, *Projects, Commissioning of the Regional LNG Terminal*.

[31] Ibid.

[32] The Three Seas Initiative, *Priority Interconnection Projects*, p. 102.

[33] Michał Paszkowski, 'Wielki Brat nie ustępuje: Wysiłki państw Europy Środkowej, na rzecz zmniejszenia uzależnienia od dostaw surowców energetycznych z Rosji' (Lublin: Instytut Europy Środkowej, 2021), pp. 29–30.

the findings of the Baltic Energy Market Interconnection Plan (BEMIP) study, and the agreements reached by the member states. Following the decision of the Republic of Finland to withdraw its own plans for a regional terminal in 2015, it was agreed that investment would be constructed in the Republic of Estonia, in Paldiski, the location of the Balticonnnector landfall. Upon notification as a priority project in 3SI, all requisite planning and pipeline front-end engineering design (so called FEED), has been completed. Also, all necessary building and environmental permits had been obtained. Preliminary on-site works to prepare the infrastructure have commenced.[34]

The project has been—as it was said above—agreed upon within the BEMIP framework, identified in the EU's TEN-E strategy and included by the European Commission in the Projects of Common Interest (PCI) list, as a regional cluster, together with the Balticconnector.[35] The project was deemed to be in accordance with EU legislation, and to facilitate the realisation of EU policy objectives in the energy sector, namely: security of supply, diversification, competitiveness and sustainability.[36] Nevertheless, the project ultimately failed to secure EU funding due to classification as a Project of Common Interest, towards the European Commission's policy of supporting only one PCI per region. These constituted significant constrains that affected the construction plans for new installations.[37] Furthermore, a certain degree of internal competition for EU support and funding emerged between Paldiski investment, the Lithuanian LNG terminal in Klaipeda and the LNG terminal in Tallinn, Latvia.[38] In light of these challenges, the 3SI has emerged as a crucial source of the support for the investment.[39]

[34] The Three Seas Initiative, *Priority Interconnection Projects*, pp. 101–02.

[35] Projects of common interest (PCIs) objective idea is to facilitate the completion of the European internal energy market and enable the EU to achieve its energy and climate objectives. These include the provision of affordable, secure and sustainable energy for all Europeans, as well as the pursuit of a climate-neutral economy by 2050. European Commission, *Questions and Answers on the New List of EU Energy Projects of Common and Mutual Interest*, https://ec.europa.eu/commission/presscorner/detail/en/qanda_23_6048 (access: 20 May 2024).

[36] The Three Seas Initiative, *Priority Interconnection Projects*, pp. 101–02.

[37] Damian Szacawa, 'Ewolucja podejścia Estonii wobec Inicjatywy Trójmorza', *Komentarze IEŚ* 270: 173, 2020, https://ies.lublin.pl/komentarze/ewolucja-podejscia-estonii-wobec-inicjatywy-trojmorza/ (access: 20 May 2024).

[38] Ibid.

[39] Michał Paszkowski, 'Region Morza Bałtyckiego: Możliwe nowe punkty na mapie elektrowni jądrowych', *Komentarze IEŚ* 293: 196, 2020, https://ies.lublin.pl/komentarze/region-morza-baltyckiego-mozliwe-nowe-punkty-na-mapie-elektrowni-jadrowych/ (access: 20 May 2024).

Following the Russian Federation's full-scale aggression against Ukraine in February 2022, the initiative gained considerable importance. In response, the Baltic States made the decision to suspend its gas import form Russia.[40] In May 2022, the Estonian gas system operator Elering entered into an agreement with its Finnish counterpart Gasgrid Finland, whereby the two companies would have cooperated on the joint lease and operation of a floating LNG terminal (Floating Storage and Regasification Unit—FSRU). Elering's management has indicated that negotiations are underway with the shipowner on the Finnish side regarding the potential relocation of the FRSU to Estonia by the end of 2022. The floating LNG terminal was deemed suitable for mooring off the coasts of both countries, specifically at Paldiski in Estonia and Inga in Finland. In accordance with the terms of the agreement, both parties have undertaken to construct the requisite infrastructure for the operation of the floating LNG terminal at their respective locations. Furthermore, it was stated that the costs associated with leasing the FRSU would be borne jointly and distributed proportionately based on the respective countries' domestic crude oil consumption. This would entail Estonia bearing a 20% share and Finland an 80% share. Additionally, negotiations were conducted regarding the construction of an LNG unloading quay in Paldiski, the designated location for the unit's docking. The operator, Elering which was responsible for implementing the project on the Estonian side, was engaged in discussions with two private entities: the companies Alexela and Infortar. Once Finland has prepared its quay or the gas carrier, it should be feasible to relocate there too. It should be viable to supply both Finnish and Estonian customers from the FRSU moored on the Finnish coast by utilizing the Balticconnector subsea gas link.[41]

Regrettably, the realisation of the investment was marred by numerous challenges and disagreements between investors.[42] In May

[40] Patricia Cohen, 'Estonia Never Needed to Import Gas by Ship. Until It Did', *The New York Times*, 12 August 2022, https://www.nytimes.com/2022/08/12/business/economy/estonia-natural-gas-lng.html (access: 20 May 2024). Michał Paszkowski, 'Państwa bałtyckie: Rezygnacja z importu gazu ziemnego z Rosji', *Komentarze IEŚ* 587: 99, 2022, https://ies.lublin.pl/komentarze/panstwa-baltyckie-rezygnacja-z-importu-gazu-ziemnego-z-rosji/ (access: 20 May 2024).

[41] Joanna Hyndle-Hussein, *Estonia i Finlandia wspólnie w projekcie terminalu LNG*, Analizy, Ośrodek Studiów Wschodnich, 12 May 2022, https://www.osw.waw.pl/pl/publikacje/analizy/2022-05-12/estonia-i-finlandia-wspolnie-w-projekcie-terminalu-lng (access: 20 May 2024).

[42] Global Energy Monitor, *Paldiski FSRU*, https://www.gem.wiki/Paldiski_FSRU (access: 20 May 2024); Hyndle-Hussein, *Estonia i Finlandia*; ERR News, *Negotiations*

2022, the Estonian Ministry of Economy and Communications, Elering and Alexela reached definitive agreement regarding the advancement of the project. Alexela and Infortar have undertaken the constructions of the quay and the leasing of the FRSU, as part of this agreement. In June 2022, Elering initiated the construction of a 1,2 km pipeline, connecting the proposed FSRU to the grid.[43] In July 2022, Estonian media outlets reported that the government had granted a state guarantee for the construction of the Paldiski FSRU. Concurrently, the Estonian government declared an increase of EUR 38 million in the share capital of the Estonian Stockpiling Agency (ESPA) with the objective of ensuring investment security for the private developers responsible for constructing the Paldiski wharf, namely Alexela an Infortar. Subsequently, in August 2022, it was announced that Finland's Gasgrid had entered into ten-year lease agreement with the US-based company Excelerate Energy, for the FSRU—Exemplar. The unit was to provide liquefied natural gas regasification services in the Baltic Sea for both Finland and Estonia. The construction of the mooring point and the connection to the Balticconnector pipeline was completed in October 2022.[44] In March 2023, the Estonian Stockpiling Agency and Pakrineeme Port reached an agreement whereby the state purchased the LNG loading quay in Paldiski, along with related infrastructure and port property for total value of EUR 31,5 million.[45] According to experts, the purchase of the wharf had the advantage of stabilising the market and establishing the state as a dominant force in the procurement of LNG. The acquisition was expected to facilitate the establishment of an autonomous gas security of supply solution for Estonia, overseen by the state-owned transmission system operator Elering, which has constructed a pipeline linking the jetty to the grid. It is convincible that the gas form this FRSU could be utilised to replenish the substantial Incukalns crude storage facility in Latvia.

for LNG Mooring Quay between Alexela and Elering Fail, 6 May 2022, https://news.err.ee/1608589321/negotiations-for-lng-mooring-quay-between-alexela-and-elering-fail (access: 20 May 2024); Dariusz Malinowski, *Nie ma chętnych na gaz z kosztownego terminala LNG. Jest plan ratunkowy*, wnp.pl, Gazownictwo, 17 March 2023, https://www.wnp.pl/gazownictwo/nie-ma-chetnych-na-gaz-z-kosztownego-terminala-lng-jest-plan-ratunkowy,689345.html (access: 20 May 2024).

[43] Global Energy Monitor, *Paldiski FSRU*.

[44] Sanja Pekic, *Excelerate Energy's FSRU Exemplar Heads out to Serve Finland*, Offshore Energy, 26 August 2022, https://www.offshore-energy.biz/excelerate-energys-fsru-exemplar-heads-out-to-serve-finland/ (access: 20 May 2024).

[45] ERR News, *State Buys Paldiski LNG Quay from Pakrineeme Port*, 10 March 2023, https://news.err.ee/1608911174/state-buys-paldiski-lng-quay-from-pakrineeme-port (access: 20 May 2024).

The facility has the capacity to hold up 2,3 billion cubic meters of crude. This represents more than half of combined gas demand of Lithuania, Latvia and Estonia.[46] In May 2023, the governments of Estonia and Latvia announced their intention to negotiate an agreement that would allow for the joint purchase od liquified natural gas in the event of a shortage. The agreement would facilitate the delivery of LNG to the port of Paldiski via FSRU. In the event of a potential shift in the LNG market, resulting in supply challenges, an agreement has been drafted between Estonia and Latvia. This agreement outlines the possibility of jointly leasing the FSRU to address a projected deficit.[47] Despite the Paldiski terminal project's completion, its assessment, at both the political and scientific levels, remain highly critical. In statement released in May 2023 the Estonian Auditor General, Janar Holm, advised country's Minister of Climate, Kristen Michal, that there is a need for a central coordinating entity and a financing strategy for the terminal project. Furthermore, it was recommended that the schedule for the development of the terminal investment should be more detailed and transparent. Moreover, Holm stated that the National Audit Office deems it necessary to address the matte, given that approximately EUR 60 million of taxpayer funds have been invested in the construction of the port and gas infrastructure in Paldiski, yet the LNG receiving capacity has not been fully guaranteed.[48] The case of the Paldiski LNG terminal, illustrates the pivotal role played by the 3SI projects in providing support for regional initiatives, particularly in instances where financing from European Union programmes is unavailable. Nevertheless, as evidenced by the assessments of Estonian researchers, projects should have been more meticulously planned, prepared, and evaluated. Greater emphasis should be placed on substantiating the project's character and ensuring its financial sustainability. Additionally, greater attention should be directed towards pre-implementation analyses, assessments of market conditions and potential, and the evaluation of prospective participants and beneficiaries. It is similarly important to ensure with a comparable profile will not be duplicated in the region. The

[46] Malinowski, *Nie ma chętnych na gaz*.

[47] ERR News, *Estonia, Latvia Plan Joint LNG Crisis Supply Deal*, 2 May 2023, https://news.err.ee/1608964834/estonia-latvia-plan-joint-lng-crisis-supply-deal (access: 20 May 2024).

[48] ERR News, *Auditor General Lists Issues to be Resolved at Paldiski LNG Terminal*, 18 May 2023, https://news.err.ee/1608981527/auditor-general-lists-issues-to-be-resolved-at-paldiski-lng-terminal (access: 20 May 2024).

replication of regional projects within the same thematic area results in mutual exclusion from EU funding and the 'cannibalisation' of funds under 3SI initiatives, which calls into question the role of the 3SI and the investments that flow from it.[49]

As the implementation phase of other Estonian priority projects under 3SI is still underway, they will only be briefly characterised here.

The second project in the field of energetic infrastructure, registered in 2018 is the construction of the 500 MW Estonian Pumped-Hydro Energy Storage—Estonian PHES[50]. Furthermore, the project will be situated also in Paldiski, Estonia. The geological and hydrogeological conditions in the Paldiski Bay were determined to be conductive to the construction of PHES. Following the completion of a series of environmental impact assessment reports, the project was deemed to be compatible with the existing environment conditions, as evidenced by the outcomes of the spatial planning and surfaces licensing process.[51] The project is notable for its innovative nature and significant implications for regional and European Union priorities. Consequently, it was accepted as a priority project, despite the fact that only one participating state from 3SI—Estonia—is involved.[52] The objective of the programme is to facilitate the transition of the European power system by providing storage solutions and enabling the integration of large-scale renewable energy sources into the grid. Furthermore, the project offers the additional benefit of the continental European power network. This would be achieved by providing system energy, improving flexibility and facilitating the development of a balanced market. The idea was presented as a distinctive energy solution, with the economic benefit deriving from the synergy between deep granite mining and large-scale energy storage.[53] The most noteworthy aspect of the project is its pioneering business model, which has the potential to exert a significant, scalable influence across the entire region. A fundamental aspect of the project is the development of sustainable, innovative and secure IT, construction and energy technologies. Furthermore, the project will facilitate the creation of

[49] Kuusik, *How Does the Three Seas Initiative Help Estonia*.

[50] The Three Seas Initiative, *Priority Interconnection Projects*, p. 103.

[51] Zero Terrain, *European Commission Recognises Zero Terrain Paldiski as Vital Step Towards Energy Security and Independence*, 25 April 2024, https://zeroterrain.com/eu-commission-recognizes-zero-terrain-paldiski-as-vital-step-towards-energy-security-and-independence/ (access: 22 May 2024).

[52] The Three Seas Initiative, *Priority Interconnection Projects*, p. 103.

[53] Ibid., p. 103–04.

new business and the advancement of cross-sectoral collaboration.[54] The project will also enhance the resource efficiency of domestic material consumption in the Baltic region by partially substituting limestone aggregates in the Baltic roads' construction market, with more durable crystalline aggregates. Ultimately, this will lead to the generation of substantial socio-economic benefits for the East Baltic region.[55] The project's objective is to achieve the Sustainable Development Goals, the European Union's principal climate targets, and to facilitate the region's energy transition. In the study: *Analysis of the Possibilities of Raising Estonia's Climate Ambitions* by Stockholm Environment Institute, Tallinn 2019, asserts that the project will contribute to a reduction of 8,5 million tons of CO_2 emissions.[56] The project concept has been in development since 2009. At the time of notification as a 3SI priority project, the environmental impact assessments had been evaluated and the area planning process was in its final stage.[57] During the planning phase, which spanned the period 2010–2023, the requisite environmental impact assessment was duly approved. The tender is scheduled to be launched in the third quarter of 2024. At the mid 2024 the tender dossier was being prepared in order to select an EPC contractor, and the final contract type is still under discussion. The construction phase was scheduled to take place in period 2023–29.[58] The budget initially declared in 2018 was EUR 650 million, solely for the construction phase and with no secured funds. The total amount allocated project was not specified.[59] The project is to be financed by a combination of national funds, EU funds (specifically, those provided by the Connecting Europe Facility), the European Bank for Reconstruction and Development and the European Investment Bank.[60] The project's high complexity

[54] Zero Terrain, *Zero Terrain Paldiski Facts*, https://zeroterrain.com/ (access: 22 May 2024); Cameron Murray, *First Pumped Hydro Energy Storage Unit in Estonia Given Green Light for Construction*, Energy Storage News, 24 January 2023, https://www.energy-storage.news/first-pumped-hydro-energy-storage-unit-in-estonia-given-green-light-for-construction/ (access: 22 May 2024).

[55] Zero Terrain, *Zero Terrain Paldiski Facts*; Murray, *First Pumped Hydro Energy Storage Unit*.

[56] Three Seas, *Projects*, *Estonian PHES. Construction of the 500MW Estonian Pumped-Hydro Energy Storage*, https://projects.3seas.eu/projects/estonian-phes-construction-of-the-500mw-estonian-pumped-hydro-energy-storage (access: 22 May 2022); *Analysis of the Possibilities of Raising Estonia's Climate Ambition* (Stockholm Environment Institute, Tallinn, 2019).

[57] The Three Seas Initiative, *Priority Interconnection Projects*, p. 103.

[58] Three Seas, *Projects*, *Estonian PHES*.

[59] Ibid.; The Three Seas Initiative, *Priority Interconnection Projects*, p. 104.

[60] Three Seas, *Projects, Estonian PHES*.

and innovative nature have resulted in a considerable number of entities being involved. The public institutions group comprises the Office of the President of Estonia, the Ministry of Economic Affairs and Communications, the Ministry of Foreign Affairs, Estonian TSO AS Elering, the Geological Survey of Estonia, the Technical Centre of Estonian Roads Ltd., The Estonian Consumer Protection and Technical Regulatory Authority, Tallinn University of Technology, and University of Tartu. European institutions involved, apart from European Commission, are the Innovation and Networks Executive Agency and European Network for Transition System Operators for Electricity. It is worthy to note that the number of private initiatives has been engage as well. The following private initiatives engagement are particularly worthy of note: AS Alexela, Sunly OÜ, Vool OÜ, Fichtner GmbHSteiger OÜ, Skepast&Puhkim OÜ. The *Status Report 2024* indicated that the project had made substantial progress.[61]

The third project, which relates to energy infrastructure and was registered in 2018, was a joint initiative of all three Baltic States. It had been pending since 2007 and thus was not a completely novel undertaking. Furthermore, Poland is another member state of the 3SI that participating in it.[62] The project is dedicated to the integration and synchronisation of the electricity systems of the Baltic States with those of the European networks. The principal objectives of the project are aligned with the vision of a fully integrated European Continental Network, based on synchronous operation of electricity systems.[63] Furthermore, the security of the region's electricity supply is also at stake. It is important to note, that the Baltic States, including Estonia, remain part of the IPS/UPS system within BRELL electrification system (Belarus, Russia Estonia, Latvia, Lithuania——BRELL), which is managed from Russian Federation. Therefore, the project synchronisation of the electricity systems of the Baltic States with Europe, serves to eliminate the influence of third countries and reduce the potential for manipulation in the electricity market. It is also ensuring the actual integration of the Baltic States' networks with the modern and more resilient European network, and finally, it supports the integration of the energy market in the region.[64] As

[61] Ibid.

[62] The Three Seas Initiative, *Priority Interconnection Projects*, p. 20.

[63] Three Seas, *Projects, Integration and Synchronization of the Baltic States' Electricity System with the European Network*s, https://projects.3seas.eu/projects/integration-and-synchronisation-of-the-baltic-states'-electricity-system-with-the-european-networks (access: 21 May 2024).

[64] Ibid.

previously stated, the benefits of the projects will not only guarantee the security of the energy supply to the region but will also finalise the concept of a fully integrated European energy market. The budget of the initiative was initially estimated about EUR 960 million.[65] The 75% of the funds (EUR 720 million), was allocated in October 2020, by the Coordinating Committee of the Connecting Europe Facility of the EU Infrastructure Networks, for the project of the Baltic States synchronisation with the European continental networks. It was providing the maximum possible support.[66] In total, the European Commission provide EUR 1,044 billion to the project.[67] In the 2024 *Status Report*, the budget was revised to EUR 1,625 billion, with 64% of the funds secured.[68] The principal entities involved are the transmissions systems operators of the Baltic States (Litgrid, AST, Elering) and Poland (PSE). The *Status Report 2024* indicated that the project had made substantial progress.[69]

The last two projects, registered in 2018, are implemented in collaboration with Latvia, Lithuania, and Poland and dedicated to the development of transport infrastructure in the Baltic Sea basin. The Rail Baltica project, is dedicated to the development of rail transport, while the Via Baltica project concerns the improvement of road transport.

The Rail Baltica project, represents a rail transport infrastructure initiative, implemented in collaboration with Finland as an external partner, apart from 3SI collaborators, mentioned above. The project's objective is to integrate the Baltic States into the European rail network.[70] The principal objectives are to augment the proportion of sustainable mobility and diminish the environmental impact of the whole mobility sector. This will be achieved by enhancing safety, facilitating modal integration and interoperability, eliminating transport infrastructure bottlenecks and constructing missing cross-border connections. The project presents an opportunity to reduce travel times within and between Baltic States, including the improvement of conditions form commuting on routes between capitals. Additionally, it has the potential to offer a competitive and sustainable alternative for cargo transportation.[71] At the time of notification, when identified as a priority project within 3SI, it was

[65] The Three Seas Initiative, *Priority Interconnection Projects*, p. 21.
[66] Ibid.
[67] Ibid.
[68] Three Seas, *Projects, Integration and Synchronization.*
[69] Ibid.
[70] Rail Baltica, https://www.railbaltica.org/ (access: 22 May 2024).
[71] The Three Seas Initiative, *Priority Interconnection Projects*, p. 73.

not a completely novel concept. The project completion date is 2030, with the 2014–18 planning period, the 2018–25 period of design, and the 2020–30 period of construction.[72] As a part of the European Union's Trans-European Transport Network priority projects, Rail Baltica represents one of the most significant initiatives, implemented in accordance with the Public Procurement Directive. In case of Estonia, the total estimated value of the project is EUR 3,1 billion, with EUR 615 million (20%) of the investment already secured. The EU and the Estonian state are providing co-financing for the project, covering up to 85% of the total eligible costs. This is being done through the Connecting Europe Facility (CEF) funding instrument, the European Structural Funds, and funds from the Estonian National Recovery and Resilience Plan.[73] Prior to its designation as a 3SI priority project, already in 2014, a joint venture, RB Rail AS, was established with the objective of serving as a Global Project Coordinator. This was done, in order to guarantee harmonisation with the Global Project parameters and to oversee cross-border activities. In Estonia, the national implementing bodies are Rail Baltic Estonia OÜ and The Estonian Technical Regulatory Authority. As indicated in the *Status Report 2024*, the project has made significant headway.[74]

The Via Baltica project, which was initiated in 2018 and is currently being implemented in collaboration with the governments of Latvia, Lithuania, and Poland, represents the second Estonian priority initiative in the field of transport infrastructure. It should be noted that this project does not involve any external partners from the outside the 3SI.[75] In terms of consistency with EU policies and priorities, the Via Baltica project represents a significant element in the construction of the Union's territorial cohesion and the integration of peripheral regions into European transport networks. Furthermore, it plays a pivotal role in the implementation of the common transport policy. The Via Baltica route, which traverses the territory of the Republic of Poland and the Republic of Estonia, continues a vital transit corridor within this region of Europe. The route is very significant implications for regional economic development and serves as a prominent tourist destination. With regard to the Baltic States there is no alternative transport route

[72] Three Seas, *Projects, Rail Baltica–Estonia*, https://projects.3seas.eu/projects/rail-baltica-submitted-by-estonia (access: 21 May 2024).

[73] Ibid.

[74] Ibid.

[75] The Three Seas Initiative, *Priority Interconnection Projects*, p. 85–87.

for goods with the characteristics of a North-South corridor. The 30% share of freight transport on this route places significant demands on the traffic conditions, which must be guaranteed to ensure its fluidity. The existing conditions, infrastructure and driving culture along this route are inadequate to guarantee the requisite quality of traffic on the transit corridor. The level of road safety on the section concerned, is relatively low, which increases the likelihood of traffic accidents with severe consequences.[76]

At the time of its notification as a 3SI project, it was already an existing venture. Indeed, the initial section of the Via Baltica in Estonia, the 13–27 km stretch between Tallinn nd Ääsmäe, was completed in 1980. The next stage of investment was completed in 2012, comprising the 2+2 Pärnu bypasses section within the city of Pärnu, extending from 124,6 to 132,8 km. Subsequent stages of investment were completed by 2024. These included the 2+1 road section between Nurme bridge and Jänesselja junction (120,2––122,1 km) and Ääsmäe-Kohatu section (km 28–37, 2+1 road) in 2017, and the 2+2 section between Tallinn border and Topi junction (km 13–16) in 2019–20.[77] The final project completion date for the investment by Estonia, is the year 2035. The estimated investment requirements for the Via Baltica project are approximately EUR 605 million. Of this amount the projected total cost for the construction of 2+2 roads between Uulu junction and the Tallinn city border is estimated EUR 455 million for the period 2021–30. The projected total cost for the construction of 2+1 roads between Ikla (border crossing) and the Uulu junction is estimated at EUR 150 million for the period 2031–35. Secured financing has been obtained to the value of EUR 50 million, representing the 8% of the total.[78] The financing of the design and construction of the road sections is provided by national sources. It is anticipated that certain elements of the project will be co-financed by the European Union Cohesion Fund during the period 2021–27. In the Republic of Estonia, the implementing entity is the Estonian Road Administration, which is under the purview of the Ministry of Economic Affair and Communications. The mentioned ministry serves as both the promoter and beneficiary of the project. In accordance with the *Status Report 2024*, the status of the project was determined to be 'with activity reported'.[79]

[76] Three Seas, *Projects, Rail Baltica–Estonia.*
[77] Ibid.
[78] Ibid.
[79] Ibid.

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