CHAMBRE DE COMMERCE FRANCE LITUANIE
Prancūzijos ir Lietuvos Prekybos Rūmai

Lithuania in the Post-russo-ukrainian War Era

Regional Realignment and Opportunities for French Companies

Strategic Note – CCFL
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Executive Summary

The post-Russia-Ukraine war period should not be understood as a simple return to the pre-2022 regional economic model. For Lithuania, the war has accelerated a realignment already underway: a lasting break with Russia, Belarusian uncertainty, the repositioning of the port of Klaipėda, rising security stakes on NATO's eastern flank, Poland's growing role as a regional hub, and deepening ties with the Baltic, Nordic and broader European countries. In this context, Lithuania can progressively position itself as a regional hub for security, resilience, energy, cybersecurity, specialised logistics and business services.

Ukraine's reconstruction will be one of the major economic drivers of the post-war period. Needs will be substantial across infrastructure, energy, housing, healthcare, municipal services, transport, demining, digitalisation and defence. However, Lithuania should not be analysed solely as a relay for this reconstruction effort. Poland will likely remain the primary physical hub towards Ukraine, given its size, direct border and logistical weight. Lithuania can instead play a complementary and specialised role, particularly across the Baltic states through cybersecurity, energy, institutional cooperation, critical services and certain regional resilience projects.

Belarus is a central factor in this realignment. Before 2022, certain Belarusian flows — notably those linked to potash — transited through Lithuania and the port of Klaipėda. Sanctions and political rupture have profoundly altered this situation. A significant share of these flows has been redirected towards alternative routes, primarily Russian and Asian, which limits the likelihood of an automatic return to the pre-war situation even in the event of a partial easing of sanctions. Belarus must therefore be approached both as a potential long-term opportunity and as an immediate strategic risk.

Lithuania's geography reinforces this reading. The proximity of Kaliningrad, the importance of the Suwałki corridor and the growing presence of European military forces all show that security considerations directly shape future needs in infrastructure, transport, energy, cybersecurity, surveillance and critical services. For French companies, this opens prospects in defence, dual-use, cybersecurity, energy, networks, transport, logistics, construction, water, healthcare, compliance and financing.

In this context, the Chambre de Commerce France-Lituanie can play a useful role as a connector. Its action could consist of identifying relevant French companies, mapping Lithuanian partners, monitoring European funding mechanisms and supporting companies in their understanding of regional risks. The priority is not to wait for the official end of the war before acting, but to position now on a realignment that is already underway.

1. Before 2022: the former regional model

Before Russia's invasion of Ukraine in 2022, Lithuania already held a firmly established place within the European Union and the Euro-Atlantic space. A member of both the EU and NATO since 2004, and of the eurozone since 2015, the country had clearly oriented its economic, political and institutional development towards the West. Its foreign trade, investments, regulatory standards and business environment were already largely integrated into the European framework.

However, certain segments of the Lithuanian economy remained linked to the East. This was due primarily to the country's geography and to the legacy of its insertion into the post-Soviet space. Railway infrastructure, certain transit flows, the role of the port of Klaipėda and a share of trade with Russia and Belarus maintained concrete economic connections with this regional environment. Lithuania thus retained an interface function between the European Union and the eastern space, particularly in transport, logistics and transit trade.

The port of Klaipėda illustrated this position particularly well. As the country's principal seaport and a strategically important national infrastructure, it served as a key outlet for several regional flows. Before the war-related sanctions, a significant share of Belarusian exports transited through Lithuania before being shipped via Klaipėda. This logistical function gave the port a role that extended well beyond the Lithuanian domestic market, embedding it in a broader regional dynamic in which Belarus occupied a notable position.

Belarusian potash is the most telling example of this former interdependence. Its transit through Lithuania did not mean that the Lithuanian economy was structurally dependent on Belarus, but it showed that certain sectors: port, rail and logistics in particular that directly benefited from flows originating in the East. More broadly, Russia and Belarus represented less a centre of gravity for the Lithuanian economy than a logistical legacy that remained visible, particularly in transport and transit infrastructure.

Lithuania was therefore not dependent on the East, but certain logistical and port segments remained structured by its interface role between the European Union and the post-Soviet space. This distinction is essential for understanding the rupture brought about by 2022: the war did not reverse the country's fundamental orientation, which was already westward, but it put an end to a regional model in which certain economic functions continued to connect Lithuania to its eastern neighbourhood.

2. Since 2022: rupture and repositioning

Russia's invasion of Ukraine in February 2022 profoundly accelerated the transformation of Lithuania's regional positioning. It did not create its westward orientation from scratch; that orientation was already long-established but it reduced the remaining space for compromise in certain economic and logistical areas with Russia and Belarus. The war thus turned a gradual evolution into a strategic rupture.

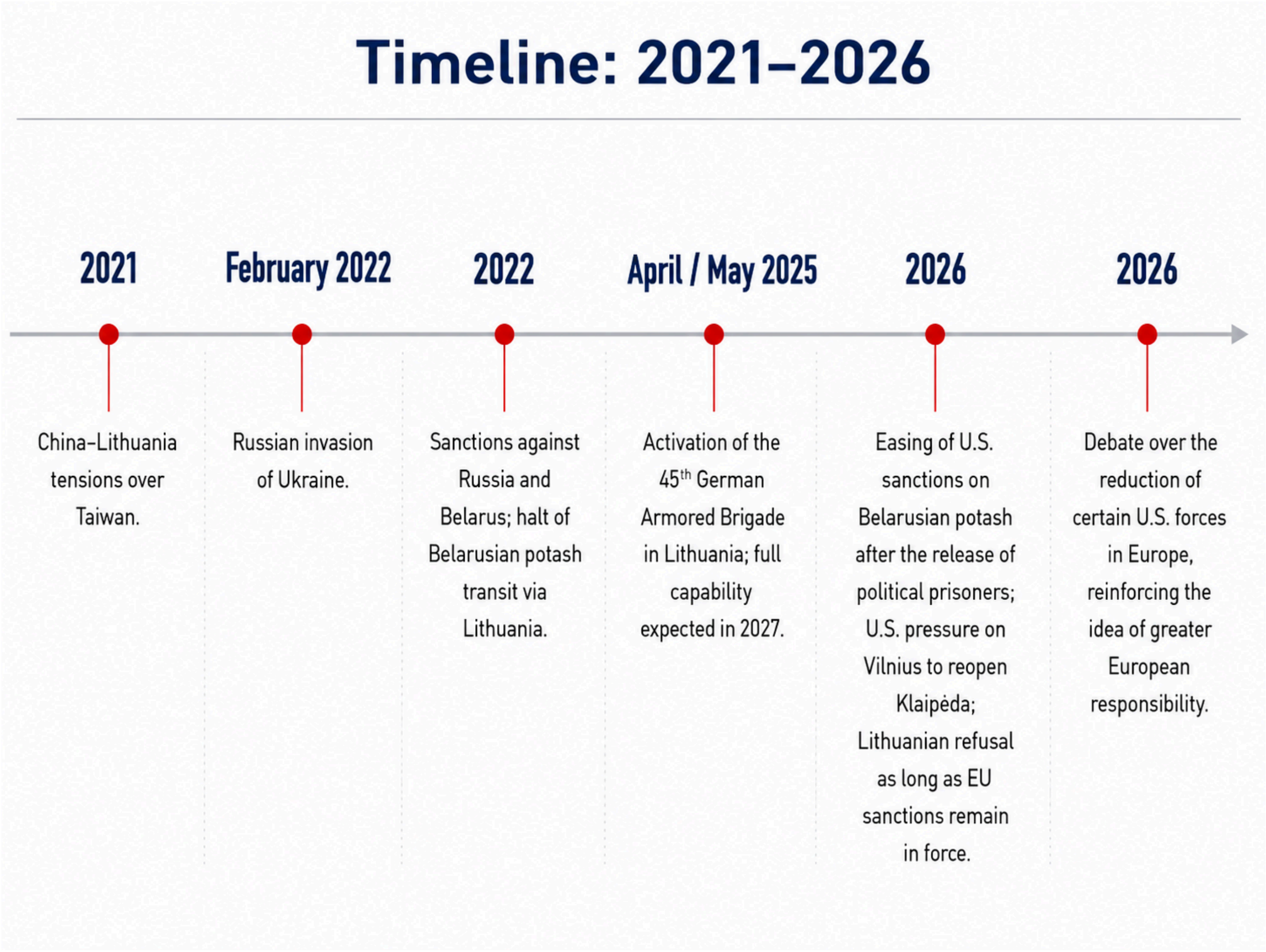
The first consequence was a sharp reduction in East-West flows. European and American sanctions against Russia and Belarus constrained trade, weakened traditional commercial routes and called into question certain transit flows. The case of Belarusian transit through Lithuania particularly around potash illustrates this rupture. What had previously followed an economic and logistical logic became a political, legal and strategic matter. The port of Klaipėda, which had benefited from certain eastward flows, was directly affected by this realignment.

Beyond trade flows, the war also reinforced the perception of a lasting threat along the eastern borders of the European Union and NATO. For Lithuania, this threat is not limited to Russia in the broad sense: it is also embodied in the proximity of Kaliningrad, Belarus's alignment with Moscow and the vulnerability of the Suwałki corridor. This geography places Lithuania in a permanent security logic, in which military, energy, logistical and digital questions are becoming increasingly intertwined.

In this context, hybrid risks have taken on greater importance. Cyberattacks, disinformation, instrumentalised migratory pressure, potential sabotage of critical infrastructure and sanctions circumvention are now part of the strategic environment for both companies and public institutions alike. Economic security can therefore no longer be separated from questions of defence, cybersecurity, compliance and infrastructure resilience.

This rupture has driven a sharper reorientation towards the European Union, NATO, Poland, the Nordic countries and Ukraine. Rising defence expenditure, the gradual deployment of the German brigade in Lithuania and the debates surrounding the future role of American forces in Europe all reinforce the idea that Europeans will need to assume a growing share of eastern flank security. This evolution is generating new needs in infrastructure, military mobility, energy, storage, cybersecurity, surveillance, transport and critical services.

Lithuania is thus moving from a partial East-West corridor role to that of a North-South, Baltic and Euro-Atlantic hub. This repositioning is not a distant future scenario: it is already underway. Economic flows are being redirected, security priorities are intensifying and regional partnerships are being strengthened. For French companies, the challenge is therefore not only to anticipate the post-war period, but to understand a realignment that is already in motion.



3. Post-war scenarios

The evolution of the regional environment will depend largely on the form that the end or stabilisation of the war in Ukraine takes. In this perspective, it is more useful to reason through scenarios than to anticipate a single possible future. This approach makes it possible to identify the strategic constants for Lithuania, despite the uncertainty surrounding its relations with Russia, Belarus and Ukraine.

Scenario	Ukraine	Russia	Belarus	Effects for Lithuania
Frozen conflict	Limited reconstruction	Enduring threat	Aligned with Moscow	Defence, cybersecurity, border control
Fragile peace	Accelerated reconstruction	Contained hostility	Sanctions maintained	Infrastructure, energy, cooperation with Ukraine
Limited détente	Stronger reconstruction	Reduced tensions	Partial reopening	Logistics, Klaipėda, compliance, cautious trade

This matrix shows that even in the most favourable scenario, Lithuania would not simply return to the pre-2022 regional model. Security, energy, transport, cybersecurity and infrastructure needs would remain structurally important across all scenarios considered. The difference between scenarios therefore relates less to the nature of the challenges than to their intensity and the pace of economic opportunities.

4. Belarus, Klaipėda and potash: the forgotten factor

Belarus is a central factor in understanding Lithuania's regional repositioning. Before 2022, certain Belarusian flows transited through Lithuania, notably via the port of Klaipėda. Belarusian potash is the most telling example: it illustrated a form of logistical interdependence between Belarus, Lithuanian railway infrastructure and maritime access to the Baltic Sea. This relationship did not mean that the Lithuanian economy was structurally dependent on Belarus, but it showed that certain sectors: port, rail and logistics that still directly benefited from flows originating in the East.

Since 2022, sanctions against Russia and Belarus have profoundly altered this situation. Belarusian transit through Lithuania has fallen sharply, while Klaipėda has had to adapt to the loss of certain regional flows. Most significantly, Belarus has for the most part redirected its exports towards alternative routes, primarily Russian and Asian. This reduces the likelihood of an automatic return of flows to Klaipėda, even in the event of a partial easing of sanctions. The Belarusian dossier must therefore be approached with caution: it may represent a logistical opportunity in the long term, but it remains today a political, legal and strategic risk.

Three scenarios can be considered for the relationship between Lithuania and Belarus in the post-war period:

Belarus Scenario	Probability	Consequence for Lithuania
Pro-Russian status quo	High	Limited recovery in trade, with security remaining the priority
Partial reopening	Medium	Limited logistical opportunity, but high political risk
Political transition	Low, including in the medium term	Significant potential, but a highly uncertain scenario

Lithuania should therefore not build its strategy on the assumption of an automatic return of Belarusian potash to Klaipėda. The country's repositioning should instead rest on the diversification of flows, the development of new regional corridors, infrastructure security and deeper integration with the European Union, Poland and the Nordic countries. Belarus remains a factor to monitor, but it can no longer be considered a stable pillar of the Lithuanian logistical model.

5. Kaliningrad, Suwałki and NATO dynamics

Lithuania's geography is a central element in understanding the economic and strategic stakes of the post-war period. Lithuania does not simply border an abstract or distant Russia: it faces concrete, immediate and lasting constraints linked to its position on the eastern flank of the European Union and NATO. This geographical reality directly shapes the country's future needs, well beyond purely military questions.

The first factor is the proximity of Kaliningrad, a heavily militarised Russian enclave situated between Lithuania and Poland on the Baltic Sea. This territory concentrates air defence, surveillance, naval presence and strategic pressure challenges across the entire region. Added to this is the role of the Suwałki corridor, a strip of territory located between Kaliningrad and Belarus, which constitutes the main overland link between the Baltic states and the rest of NATO. In the event of a regional crisis, this corridor represents a major point of vulnerability, but also an absolute priority for mobility, transport and security infrastructure.

Belarus further reinforces this geostrategic equation. As Lithuania's immediate neighbour, closely aligned with Moscow, the Belarusian regime is not merely a political or diplomatic factor but also a permanent security variable. The simultaneous proximity of Kaliningrad and Belarus places Lithuania in a singular configuration, where defence challenges translate directly into concrete economic needs: military mobility, road and rail improvements, strategic storage, energy security, surveillance, cybersecurity and the protection of critical infrastructure.

This geographical constraint is taking on greater importance in a context of European security rebalancing. The debate over a partial reduction of American military presence in Europe coexists with the growing role of European actors, notably Germany, whose permanent brigade in Lithuania is expected to reach full operational capacity by 2027. In this framework, Lithuania is emerging as a space of increasing concentration of defence, resilience and logistical preparation efforts on the eastern flank.

Security is therefore not a subject separate from the economy: it shapes future needs in infrastructure, energy, transport, cyber and critical services. For French companies, this evolution opens prospects across several domains, including defence, optronics, cybersecurity, engineering, infrastructure and mobility.

6. New partners: Poland, Baltic states, Nordics, Germany, France

The break with Russia and Belarusian uncertainty represent only one side of the regional realignment. The other side is a progressive tightening of Lithuania's ties with a set of partners whose economic, military and logistical weight is growing in the post-war period: Poland, the Baltic states, the Nordic countries and Germany.

This movement is not symmetrical. Poland is establishing itself as the indispensable continental hub towards Ukraine, with a direct border, a market of 38 million inhabitants and considerable logistical weight. For Lithuania, Poland is both a structuring partner and a natural competitor for Ukrainian reconstruction flows. Rail Baltica and Via Baltica reinforce this relationship by creating North-South corridors that physically connect the two countries, while also placing Poland in a position to capture a significant share of regional flows. This reality is addressed in detail in the following section.

The Baltic states, for their part, are deepening their coordination on shared challenges: defence, cybersecurity, energy, interconnections and responses to hybrid threats. The synchronisation of the Baltic electricity grid with the continental European network, completed in February 2025, is the most concrete illustration of this: it marks a physical break with the Soviet legacy and reinforces the region's energy autonomy.

The Nordic countries, particularly Finland and Sweden, now NATO members, are playing a growing role in the Baltic security and energy architecture. For French companies, this Nordic-Baltic rapprochement means that Lithuania can function as an entry point into a broader regional space, rather than an isolated market of 3 million inhabitants.

Germany, finally, introduces a new and often underestimated economic variable. Its permanent brigade in Lithuania, whose build-up continues through 2027, generates direct needs in infrastructure, housing, transport and services that go well beyond the purely military domain. The German military presence is creating concrete local economic demand, right now.

For French companies, entry into Lithuania should therefore not be conceived at the scale of the national market alone. It sits within a rapidly realigning Poland-Baltic-Nordic space, where Lithuania can serve as a specialised foothold towards the region as a whole.

7. Ukraine: reconstruction and Lithuania's possible role

Ukraine's reconstruction will be one of the main economic challenges of the post-war period. Needs will cover energy, housing, transport, healthcare, schools, water networks, municipal infrastructure, demining, digitalisation and defence. The task will not simply be to repair the destruction, but also to modernise the country and bring its infrastructure and standards closer to those of the European Union.

Financing will draw on both public and private resources. The European Union is expected to retain a central role through the Ukraine Facility (50 billion euros over 2024-2027) and the European Investment Bank, alongside the EBRD, the World Bank, partner states and various guarantee mechanisms. For foreign companies, access to opportunities will therefore depend on monitoring calls for tender, available financing and local partners.

Poland is expected to establish itself as the primary physical hub towards Ukraine, given its direct border, the size of its market and its logistical infrastructure. Lithuania can nonetheless occupy a complementary position in areas where it holds recognised expertise: cybersecurity, energy, critical infrastructure protection, digitalisation, training and municipal cooperation.

This willingness to engage is already beginning to translate into concrete action. In March 2026, a delegation from the port of Klaipėda, led by its Director General Algis Latakas, met with Ukrainian authorities to discuss the security, operation and reconstruction of port infrastructure. This initiative shows that Lithuania is seeking to position itself as a technical and logistical partner in Ukraine's maritime reconstruction.

Municipal cooperation could also open opportunities in water, waste management, district heating, public transport, schools and healthcare. French companies could thus draw on Lithuanian partners to access certain projects linked to resilience and essential services.

Lithuania is therefore not an alternative to Poland for Ukraine; it can be a specialised Baltic complement. Its value rests less on its size than on its expertise, its political commitment and its capacity to connect Baltic, Nordic, European and Ukrainian actors.

8. Why Lithuania, and not only Poland?

In the post-war period, Poland is expected to naturally establish itself as the principal regional hub towards Ukraine. Its direct border, the size of its market, its logistical infrastructure and its political weight give it an advantage that is difficult to contest. For a French company, the question is therefore not whether to systematically choose Lithuania over Poland, but to determine in which areas Lithuania can offer a complementary positioning that is more specialised and sometimes more accessible.

Criterion	Poland	Lithuania
Market size	Very large	Limited
Proximity to Ukraine	Very high, with a direct border	Moderate, without a direct border
Logistical role towards Ukraine	Main regional hub	Secondary and specialised role
Access to the Baltic States	Relatively good, but peripheral	Very strong, at the heart of the Baltic region
Access to the Nordic countries	Moderate	Stronger, notably through the Baltic Sea
Cyber and digital	Strong ecosystem	Particularly credible positioning
Defence of NATO's eastern flank	Major regional military power	Specialised strategic position on the Baltic flank

Business competition	Very high	More accessible and less saturated market
Relevance for French SMEs and mid-sized companies	Large market, but highly competitive	Smaller, more targeted and more accessible market

Poland therefore remains the primary platform for large-scale logistical, industrial and commercial operations directly oriented towards Ukraine. It already concentrates a large number of international players, however, which makes market access more competitive and tends to favour large groups with significant resources.

Lithuania offers a different positioning. Its value does not rest on the size of its market, but on its specialisation in certain areas: cybersecurity, defence and dual-use, energy, critical infrastructure, compliance, Baltic cooperation and regional services. It can also represent a more accessible entry point for French SMEs and mid-caps seeking to develop their activities progressively across the Baltic states, and from there towards Nordic, Polish or Ukrainian markets.

Poland is thus the primary regional hub, while Lithuania can position itself as a niche hub. The two countries should not be seen as mutually exclusive alternatives, but as two complementary entry points. A French company can draw on Poland for volumes, heavy infrastructure and direct access to Ukraine, while using Lithuania for specialised activities linked to the Baltic space, digital, security, energy and regional resilience.

9. Priority sectors and market entry for French companies

The economic and strategic realignment of the region is opening opportunities across several sectors where French companies hold recognised expertise. These opportunities do not stem solely from Ukraine's future reconstruction; they are also linked to growing Lithuanian needs in defence, resilience, cybersecurity, energy, transport and the protection of critical infrastructure.

The most promising sectors are distinguished by their cross-cutting nature: investments in defence and dual-use generate needs in infrastructure, mobility, energy and digital services; the development of Rail Baltica and the modernisation of energy networks are part of a shared logic of deeper European integration and reduced regional vulnerabilities.

The following table presents the main sectors to monitor and, for each, the type of profile most likely to match the identified needs. It provides an initial framework intended to guide the CCFL's monitoring and prospecting work.

Sector	Why it is strategic	Target profiles
Defence & dual-use	NATO, Ukraine, military infrastructure	French SMEs and mid-sized companies specialising in drones, sensors, robotics and dual-use equipment
Cybersecurity & economic intelligence	Hybrid threats, critical infrastructure	SMEs specialising in cybersecurity, threat intelligence and network protection
Energy & grids	Storage, interconnections, resilience	Mid-sized companies specialising in storage, smart grids, energy efficiency and electrical equipment
Transport & infrastructure	Rail Baltica, military mobility	Engineering firms, railway equipment suppliers and mobility solution providers
Logistics & port activities	Klaipėda, new regional corridors	Freight forwarders, specialised logistics companies and port technology providers
Construction & materials	Infrastructure and reconstruction	Mid-sized companies specialising in construction materials, prefabrication and energy renovation

Water, waste & healthcare	Municipal services and resilience	SMEs and mid-sized companies specialising in water treatment, waste management and medical equipment
Compliance & financing	Sanctions, EU tenders	Specialised advisory firms, export consultants, credit insurers and project finance specialists

Defence, cybersecurity, energy and infrastructure appear as the sectors most directly linked to Lithuania's strategic repositioning. Other areas, such as construction, water, healthcare and logistics, could benefit more progressively from Ukrainian reconstruction projects and the modernisation of regional services.

Identifying promising sectors is not sufficient, however. French companies will also need to understand the local institutional environment, build partnerships and access available financing. For SMEs and mid-caps, a progressive market entry supported by local networks is often more appropriate than direct establishment. On the Lithuanian side, the main points of contact vary by sector: Invest Lithuania and Innovation Agency Lithuania for investment and innovation projects, the port of Klaipėda and LTG for logistics and transport, Rail Baltica for railway infrastructure, and sectoral ministries and municipalities for public services and urban resilience. The CCFL can facilitate these initial contacts and reduce the cost of market entry by identifying the right partners and appropriate financing mechanisms, whether for responding to a European call for tender, building a local partnership or exploring the market through a sectoral mission.

10. Risks and recommendations for the CCFL

The opportunities linked to Lithuania's regional repositioning come with real risks that French companies will need to factor in from the moment they enter the market.

The first concerns sanctions. The regulatory framework applicable to Russia and Belarus is complex, evolving and exposes companies to significant legal and reputational risks, particularly in defence, energy, logistics and dual-use technologies. Rigorous due diligence on partners, financial circuits and the nature of goods exchanged is essential before any market entry.

The second risk is security-related. Cyberattacks, hybrid threats and the sabotage of critical infrastructure are part of the ordinary operational environment in the region. Companies establishing themselves there must anticipate these risks from the project design phase onwards. A phased investment approach also helps limit financial exposure in a context where the situation in Ukraine remains unstable.

The third risk is competitive. German, Polish and Nordic players are already well established in several key sectors. French companies seeking to enter this market with a generalist approach will encounter better-positioned competitors. A specialised positioning, focused on niches where France holds a recognised advantage, is the condition for a credible market entry.

Finally, no strategy should be built on the assumption of a return of Belarusian flows to Klaipėda. This scenario remains uncertain in the medium term and cannot serve as a reliable foundation for investment decisions.

Recommendations for the CCFL

In order to translate this regional realignment into concrete opportunities, the CCFL could focus its action on the following priorities:

1. **Establish a dedicated monitoring function** covering developments in sanctions, European tenders linked to Ukrainian reconstruction, the Belarus-Klaipėda dossier, Rail Baltica, defence and energy, and disseminate findings regularly to its members.

2. **Identify a shortlist of priority French companies to approach**, targeting the sectors most directly linked to Lithuania's repositioning: defence and dual-use, cybersecurity, energy, infrastructure, logistics and compliance.

3. **Organise a France-Lithuania event** focused on concrete post-war opportunities such as resilience, reconstruction, economic security ; bringing together member companies, Lithuanian institutions and European financiers. Such a format would allow the CCFL to position itself as a reference actor on these issues within the Franco-Lithuanian space.

4. **Position itself as a regional connector** between French companies, Lithuanian institutions, local partners and international financiers, a role the CCFL is structurally well placed to play and which constitutes its distinctive added value in this context.

Conclusion

The post-Russia-Ukraine war period will not reopen the pre-2022 regional economic model. For Lithuania, the realignment is already underway: trade flows are being redirected, defence infrastructure is being reinforced, Belarus has consolidated alternative export routes, Poland is establishing itself as the continental hub towards Ukraine and the Nordic countries are becoming lasting partners in the Baltic security and energy architecture.

In this context, opportunities for French companies exist — in defence, dual-use, cybersecurity, energy, infrastructure and critical services — but they will not remain unclaimed. German, Polish and Nordic players are already positioned in several of these sectors. The window is open, but not indefinitely.

The role of the CCFL is not to wait for the official end of the conflict before acting. It is to help French companies now to understand a realignment already in motion, to identify the sectors where their positioning is credible, and to find the partners and financing that make market entry viable.

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