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ANALYTICAL REPORT · EDITION 17.11.2026

Poland: War, Hybrid Pressure and the Resilience of Supply

Ukraine, the Baltic states, energy, food, water, infrastructure and scenarios for the next month

EDITION	17 November 2026
MAIN WINDOW	18 October – 16 November 2026
90-DAY BACKGROUND	19 August – 16 November 2026

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About this edition

Edition of 17 November 2026. The main analysis window covers 18 October–16 November 2026, and the 90-day background covers 19 August–16 November. 17 November is not included in the balances because it is incomplete.

The report separates three kinds of content: events, claims by the parties, and the author's own scenarios. Missing data are not replaced with estimates presented as measurements — where there is no comparable data series, the tables show `n.a.`.

How to read the tags in this report

Event fact

An event confirmed by the operator, the authority handling the case, or imagery described by an identifiable newsroom.

Party claim

A report or statement attributed to a specific party to the conflict or to the authorities; repetitions in the media are not independent evidence.

Leak / OSINT

Material with an identified author and date; without documents or independent verification it remains a signal.

Analytical inference

An interpretation of the stated premises, marked in the text with a box. It is not an intelligence communication.

Scenario

The author's sensitivity test. Price ranges, outage durations and warning thresholds are assumptions unless stated otherwise.

n.a.

No current, comparable data series. The tag replaces false precision.

Links and sources

Source names in the text are clickable links to the original material. The full list of addresses is in the bibliography at the end of the report. Price and gas values come from a structured financial data provider; their origin is described in chapter C and in the bibliography.

Key findings

1 Operational risk, not evidence of an imminent war with NATO

Regional air incidents and a foiled act of sabotage have been documented. At the same time, on 16 November the Ukrainian General Staff did not report signs of Russian offensive groupings forming on the Volyn and Polissia axes. This is a premise for monitoring, not a guarantee of Poland's security (VDD, 15 November, GenStaff, 16 November).

2 The air war remains intense, but not every measure of it is rising

The October KAS balance is 6,310 long-range drones, against 6,322 in September, with declared neutralisation rising from 83% to 85%. In the first week of November, however, OSW (Centre for Eastern Studies) pointed to significant under-reporting in the official overnight reports (KAS, Air War Monitor XXII, OSW, 10 November).

3 The Baltic is giving concrete warnings

In Latvia, separate episodes on 1 and 3 November received different assessments of the drones' origin, and on 14 November eight people were detained in connection with a foiled attempt to sabotage Threod Systems in Estonia. These events should not be merged into a single confirmed operation (LSM/NBS, VDD).

4 No simple "more strikes = more expensive fuel" relationship

Between the last session before the window and 16 November, Brent crude fell by 15.86%, from 109.86 USD/bbl to 92.44 USD/bbl, despite the renewed campaign against Russian refineries described by Reuters (Reuters, 9 November).

5 Gas has a buffer, but the system's full resilience has not been measured

The latest available stock is 35.3257 TWh, which against the reported capacity of 36.85 TWh gives about 95.86% fill. This is not a measure of the number of days the country can supply itself autonomously.

CORE LIMITATION

No current, comparable series were obtained for Polish retail and wholesale prices of all fuels, energy, grain, meat, oils and vegetables, nor complete daily flows from operators. These items show `n.a.` rather than false precision. The report is a risk analysis with a partly incomplete price module, not a complete market balance.

The picture in numbers

A summary of the most important readings in this edition. Every figure carries a methodological caveat in the report — given here in brief; the full context is in chapters A–G.

6,310
long-range drones in October
September: 6,322 · KAS

85%
declared drone neutralisation
September: 83% · KAS

+41%
OSINT above the official report, 3–10 Nov
1,561 vs approx. 2,200 · OSW

−15.86%
Brent: 109.86 → 92.44 USD/bbl
last session before the window → 16 Nov

≈ 95.86%
gas storage fill, 14 Nov
35.3257 of 36.85 TWh

28.8%
of Baltic areas with degraded GPS, 15 Nov
GPSInterference

8
people detained in the Threod case, 14 Nov
VDD / KAPO

None
reported signs of offensive groupings forming (Volyn and Polissia axes)
GenStaff, 16 Nov

What this edition cannot measure

n.a. Pb95 and diesel, retail and wholesale in PLN

n.a. gas and power: wholesale and tariffs

n.a. food prices in PLN, 30/90-day change

n.a. full front-line balance for 30 and 90 days

n.a. Russia/Ukraine loss ratio

n.a. impact on Polish lead times

“None” refers to the GenStaff report of 16 November; the report does not cover all potential preparations against NATO states and does not rule out covert operations.

Method and reliability

How information is classified



Five categories of information — from an event fact to the author's scenario.

- **Event fact:** confirmation by the operator or the authority handling the case, or imagery described by an identifiable newsroom. Confirming an event does not automatically confirm the perpetrator.
- **Party claim:** reports by GenStaff, the Ukrainian Air Force and the Russian Ministry of Defence, as well as statements by the authorities, remain attributed. Their repetition by several outlets does not create several independent pieces of evidence.
- **Leak/OSINT:** an author, a date and, where possible, the original material are required; without documents or independent verification the finding remains a signal.
- **Analytical inference:** an interpretation of the stated premises; it is not an intelligence communication.
- **Scenario:** the author's sensitivity test. Price ranges, outage durations and warning thresholds are assumptions unless stated otherwise.

Source hierarchy

Original DeepState and GenStaff posts, BELPOL materials, and operators' data and documents took precedence over general media. Where the open Telegram archive did not allow a full series to be reconstructed, openly described compilations by KAS, OSW and Russia Matters were used; no pretend "full 30-day balance" was calculated.

Key quality checks

Telegram dates

The DeepState HTML archive confirms a post of 15 November, 20:29 UTC, on advances near Vilne (Вільне) and Petropavlivka. Press coverage the following day does not change the date of the post (DeepState, post 24003).

Violation of Polish airspace

Lithuanian reports from the night of 10/11 November are not equivalent to Polish confirmation; DORSZ (Operational Command of the Polish Armed Forces) said a border crossing had not been confirmed (LRT, Onet, DORSZ statement).

An old event in a new report

The November publication on Mika concerns the sabotage of 15 November 2025; it is not a new attack from the month under review (Rynek Infrastruktury).

Inconsistent report

The GenStaff communiqué of 16 November gives 141 clashes, but the figures for the axes it lists do not add up to that total. The total was not arbitrarily corrected, and no percentage shares by sector were derived from it (original report).

Financial baselines

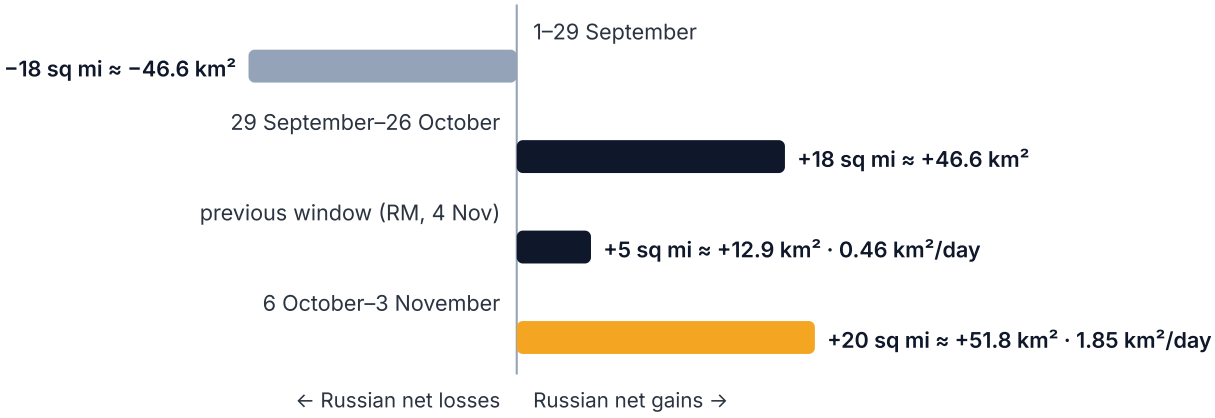
The petrol price is available as a monthly series in USD/l, not as a current Pb95 price in PLN. The "Food Inflation" series has an unclearly described base in its metadata, so it was not treated as a monthly change.

A Ukraine: front line, air war and long-range strikes

Front-line dynamics

Indicator	Observation	Significance and limitation
Russia's territorial balance, 1–29 September	−18 sq mi, approx. −46.6 km², according to DeepState as compiled by Russia Matters (RM, 28 October)	Russian net losses in this specific window; not the whole 90 days.
Balance, 29 September–26 October	+18 sq mi, approx. +46.6 km², along the same data path (RM)	A change in the sign of the balance, not evidence of an operational breakthrough.
Balance, 6 October–3 November	+20 sq mi, approx. +51.8 km², i.e. about 1.85 km²/day over a 28-day interval; previously +5 sq mi, approx. +12.9 km², or 0.46 km²/day (RM, 4 November)	Own calculations: 1 sq mi = 2.589988 km². A fourfold pace, but on small net balances.
Alternative tracker	On 3 November the Economist put the Russian gain at 5 sq mi over the previous 30 days, against 20 sq mi according to DeepState in a different window (RM)	Different windows and definitions of control; do not average.
Latest verified DeepState post	Advances near Вільне and Петропавлівка, post of 15 November; no area given (DeepState)	Does not allow a full balance for 18 October–16 November to be calculated.
Daily activity	141 clashes, 94 air strikes, 282 KABs and 7,429 kamikaze drones over the previous day, according to GenStaff on 16 November (GenStaff)	Tactical drones are not the same as long-range Shaheds.

Net balance in successive DeepState windows



The windows overlap and come from different compilations — do not add them up.

Territorial balances according to DeepState as compiled by Russia Matters. Values in km² converted by the author (1 sq mi = 2.589988 km²).

On 10 November ISW did not confirm new advances by either side, describing fighting on the Kharkiv–Kupiansk–Borova–Lyman axis, near Sloviansk/Kramatorsk and Dobropillia, and on the Zaporizhzhia axes. OSW likewise did not point to any significant shift of the front in its weekly picture (ISW, OSW).

ANALYTICAL INFERENCE

The dominant channel of impact on Poland remains strikes on rear areas and the disruption of logistics, not an observed approach of the land front towards the Polish border.

Successive, overlapping map windows should not be added together. The full pace for the main 30 days and a separate, consistently calculated 90-day balance remain `n.a.`.

Losses: what the available figures actually prove

The Ukrainian Ministry of Defence reported more than 41,000 verified hits on Russian personnel in October — up 26% on September — and almost 24,000 killed, describing registration in the DELTA system and verification by Brave1. The article did not make available raw material that would allow independent checking of the de-duplication of individuals (Ukrainian MoD, 14 November).

GenStaff separately declared 2,560 personnel losses for the day preceding the report of 16 November; there is no basis for interpreting this figure as killed only (GenStaff).

The Russia Matters equipment table of 4 November, which refers to the Oryx databases, shows a cumulative 24,251 Russian and 12,320 Ukrainian vehicles and other equipment items. This is not the number of losses from the month under review alone (Russia Matters, table and footnote 3). Neither the date of each entry nor a consistent export of the databases at the start of the window was reconstructed, so these totals were not used to calculate the current rate of losses or their full ratio.

> 41,000
verified hits on personnel, October (Ukrainian MoD)

2,560
personnel losses for the day before 16 Nov (GenStaff claim)

24,251 / 12,320
equipment RU / UA, cumulative (Oryx via RM)

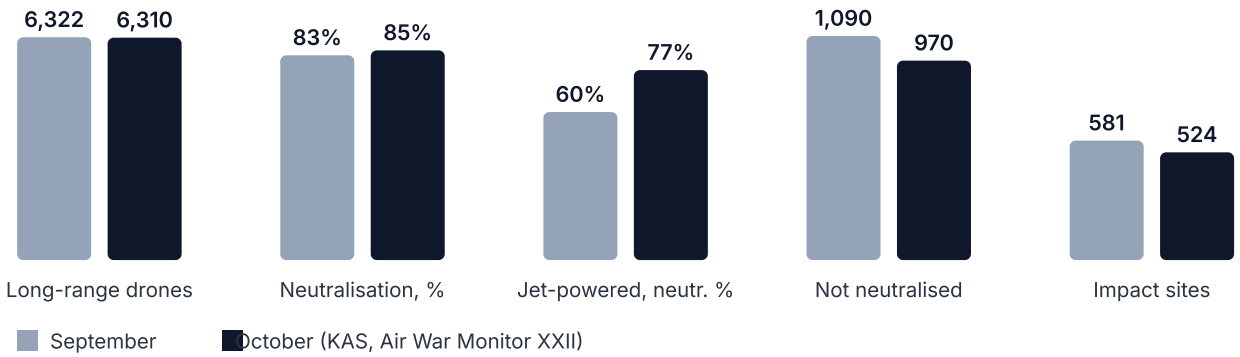
ASSESSMENT

The rise in declared hits points to the intensity of the fighting and the development of record-keeping, but it does not constitute an independent balance of irrecoverable losses. Neither a Russia/Ukraine loss ratio nor a reliable 30-day OSINT total was calculated; these fields are **n.a.**

Strike intensity and tactical changes

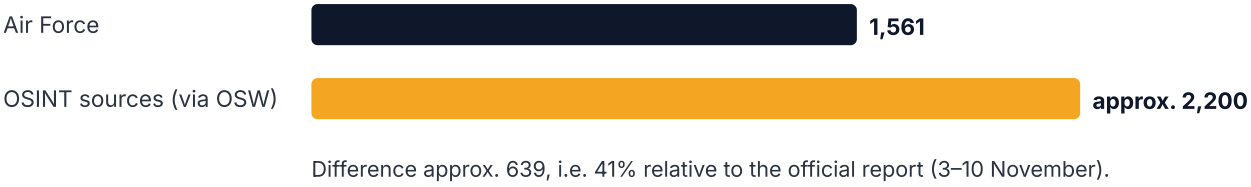
Measure	September / previous comparison	October / November	Interpretation
Long-range drones, monthly	6,322	6,310, change approx. −0.2% (KAS)	A high, almost flat volume, not a sharp rise across the whole category.
Drone neutralisation	83%; jet-powered 60%	85%; jet-powered 77% (KAS)	Data based on Ukrainian reports; "neutralisation" covers more than shooting down.
Drones not neutralised / impact sites	1,090 / 581	970 / 524 (KAS)	The number of sites is not the number of unique targets over the whole month.
3–10 November	No comparable previous week in the material collected	1,561 drones according to the Air Force; approx. 2,200 according to OSINT sources cited by OSW (OSW)	A difference of approx. 639, i.e. 41% relative to the official report; daytime attacks may be incompletely counted.
Night of 15/16 November	Not a monthly series	158 drones, including 77 jet-powered; 131 neutralised, including 55 jet-powered; hits at 19 locations (ASTRA, Interfax citing the Air Force)	One primary source repeated by two outlets, not two independent measurements.
Weekly statement by the President of Ukraine, quoted on 16 November	No consistent comparative series	More than 2,300 drones, 1,590 glide bombs and 15 missiles (AP)	A different scope from the sums of overnight reports; do not add them together.

September and October in the KAS compilation



Based on Ukrainian reports as compiled by KAS. Neutralisation covers more than shooting down.

Official report vs OSINT, 3–10 November



Ukrainian Air Force vs OSINT sources cited by OSW.

KAS points to a different October GenStaff balance — 6,473 drones against its own 6,310 — which further shows how the result depends on the definition and on when the compilation is closed (KAS).

ANALYTICAL INFERENCE

To assess the trend, separate series must be kept for long-range drones, jet-powered drones, decoys, FPVs, missiles and KABs. An aggregate “all drones” figure should not be used to forecast the threat to Poland.

Western Ukraine: geolocation at settlement level

Date of event	Area	Documented effect and significance
18 October	Malekhiv near Lviv	Logistics complex damaged, roof pierced and warehouse fire after debris fell; retrospective account in material of 1 November (RBC-Ukraine).
1 November	Lviv area, Riasne-Ruske and Pidriasne	Five houses and vehicles damaged; a drone hit a house under construction, and debris damaged, among other things, two lorries and an empty warehouse; according to preliminary information, no injuries (RBC-Ukraine).
4 November	Kovel, Volyn	Temporary power outage after the attack, according to the OSW compilation (OSW).
4 November; 7–9 November	Ternopil; Rivne oblast	Reported infrastructure damage in the OSW compilation; it does not contain a complete count of the munitions attributable to western Ukraine (OSW).

No complete, geolocated balance of strikes in distance bands from the Polish border was obtained.

ANALYTICAL INFERENCE

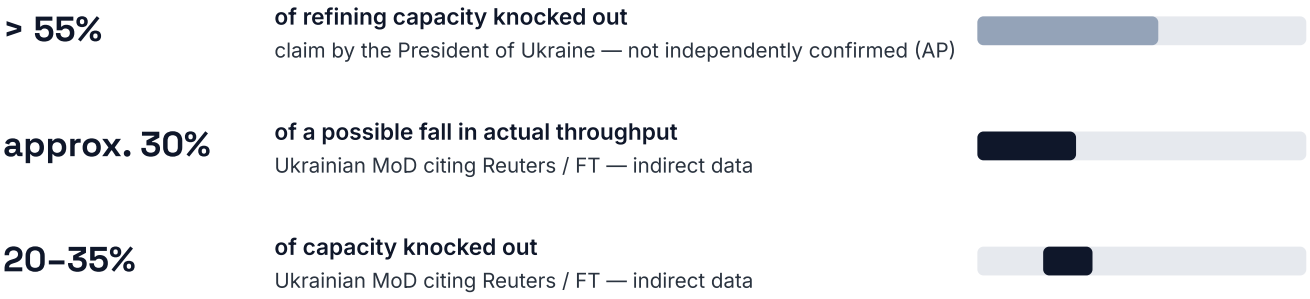
Air-raid alerts for voivodeships and oblasts alone do not show how many missiles flew close to the border or how many times Polish airspace was threatened.

Ukrainian long-range strikes

- **Refineries.** On 9 November Reuters reported strikes on at least eight large refineries over the previous two weeks and the return of sales restrictions in at least six Russian regions. Karelia limited purchases of petrol to 30 l and diesel to 50 l and suspended sales into jerrycans (Reuters).
- **Ust-Luga.** A photo of 15 November, published by Radio Svoboda after the attack of 11 November, shows — according to the newsroom — at least five completely burnt-out tanks. It cannot establish the quantity of fuel lost or the length of the export outage (Radio Svoboda).
- **Aviation and logistics.** ISW noted a Ukrainian report of a fire at the 123rd aircraft repair plant in Staraya Russa on the night of 9/10 November, about 640 km from the international border. There is no verified assessment of lost repair capacity (ISW).
- **Cruise missiles.** An OSINT analyst cited by ISW counted at least ten successful strikes with Neptune, Flamingo and Storm Shadow missiles in September–October, against five in July–August. This is a set of identified cases, not a full account of use (ISW).
- **Scale of the raids.** On 16 November the Russian Ministry of Defence claimed to have intercepted 1,336 Ukrainian drones; AP presents no independent confirmation of this figure (AP).

How much Russian refining capacity has been knocked out? Three different measures

The claim by the President of Ukraine that more than 55% of Russian refining capacity has been knocked out has not been independently confirmed; AP says so explicitly (AP). The Ukrainian Ministry of Defence cites other measures: about 30% of a possible fall in actual throughput and 20–35% of capacity knocked out, citing Reuters and the FT. Because the primary series behind these calculations were not reconstructed here, these are indirect data of limited comparability, not a basis for pricing Polish fuel (Ukrainian MoD).



Three measures with different evidential status — not comparable, not a basis for pricing Polish fuel.

A comparison of declared and indirect measures — they are not mutually confirming measurements.

SECTOR SCENARIO FOR THE NEXT MONTH

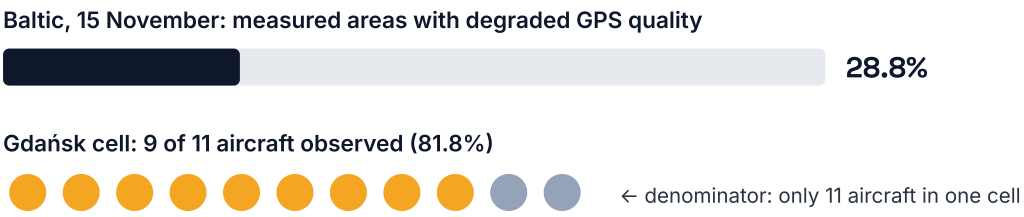
Further, repeated strikes on Ukrainian energy and rear areas should be treated as the base case. A move to the high case would require, among other things, a documented lasting loss of capacity at western hubs, or repeated, confirmed incidents on the NATO side. There is no basis for giving a numerical probability of such a move.

B Lithuania, Latvia and Estonia

Country	Data from the main window	Trend and implications for Poland
Lithuania	Night of 10/11 November: in the main episode described, one drone flew across Lithuania, and two attempts by NATO aircraft to neutralise it were unsuccessful; debris of a fired missile was found near Biržai. Reports covered four drones in the wider region, not four confirmed overflights of Lithuania (LRT).	Secondary risk covers both the object itself and the defensive action. Neither the Russian origin of every object nor a violation of Polish airspace has been confirmed.
Lithuania: airports	The same night saw balloon-related disruption: according to LRT, three flights and more than 400 passengers; Euronews gave approx. 470 (LRT, Euronews).	A measurable transport effect, but no data proving an impact on Polish prices or on the capacity of the land corridor.
Latvia	1 November: a drone assessed by the NBS as most likely a Russian Geran, armament undetermined; the threat was announced at 18:57 and the object left the airspace at 19:16. 3 November: alert 00:10–00:35, an object visually similar to Ukrainian ones, exact type and origin undetermined (LSM/NBS).	At least two separate episodes before the night of 10/11 November; not a full monthly balance. Shifting attribution feeds disinformation.
Estonia: airspace	On 11 November warnings were issued first for the southern and then the eastern counties; NATO fighters took off, in parallel with the attack on Ust-Luga. ERR gives inconsistent times for the lifting of the alert — 05:30 and 06:30 — so the duration was not calculated (ERR).	The operational effects of raids on Russian infrastructure spill over into the NATO region; an alert on its own is not a count of incursions.
Estonia/Latvia: sabotage	Foiled arson attempt against Threod Systems on the night of 14 November; eight people detained, procedural actions at nine locations in Latvia, explosives, ammunition and communications devices seized (VDD).	Evidence of a cross-border mechanism for organising an attack; not a conviction, nor evidence of a link to other incidents.
Estonia: border	On 15 November the Ministry of Foreign Affairs announced a plan to close road border crossings with Russia from 1 December, in response to the sabotage attempt attributed to the GRU (Estonian MFA).	A decision for the future, not a blockade already in force in the window under review. The scope of exemptions and the duration need further checking.

No consistent 90-day incident register was obtained for each of the countries. It is therefore not possible to reliably calculate a percentage increase in violations, cyberattacks or sabotage across the whole flank.

GNSS: a figure needs the right denominator



The GPSInterference map for flights on 15 November shows that 28.8% of the measured Baltic areas had degraded GPS quality; in the Gdańsk cell this applied to nine of the eleven aircraft observed, i.e. 81.8% (GPSInterference). This does not mean 81.8% of all flights over Poland, nor is it evidence of the location of a Russian transmitter; the publisher itself points out that results depend on traffic and receiver coverage (methodological caveats on the site).

The same site gives two non-identical 30-day averages, 31.1% and 31.4%, and 34.0% for the previous 30 days. Directionally, this does not support the thesis of a steadily worsening situation, but the inconsistency prevents a precise comparison (GPSInterference).

ANALYTICAL INFERENCE

Monitoring should focus on aggregated cells with stable coverage and on confirmations from operators, not on a single red patch on the map.

SECTOR SCENARIO

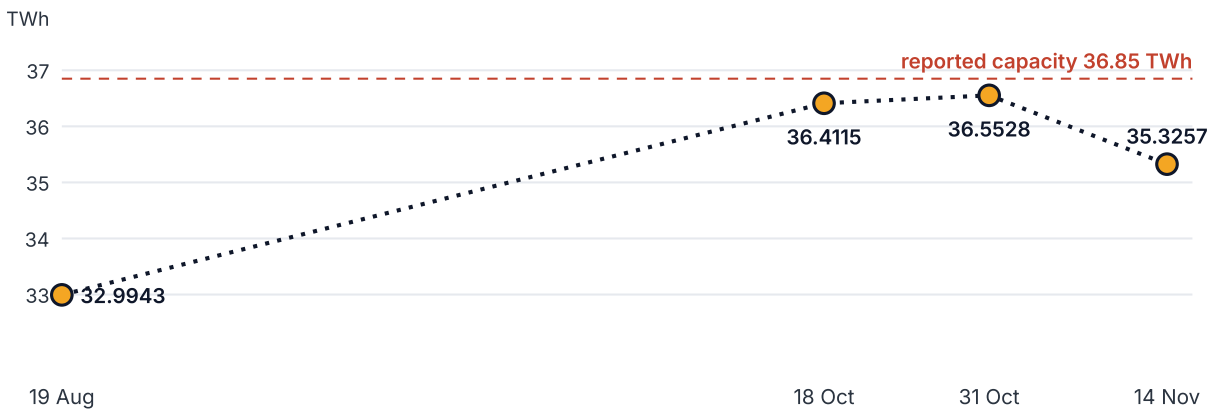
In the base case, further alerts and brief aviation restrictions should be expected; the high case would mean time-correlated damage to infrastructure or transport restrictions in several countries. There is no evidence that the incidents described were preparation for an operation against the Suwałki Gap.

C Energy and fuels

Available readings and price gaps

Item	Latest available reading	Comparison	What can be inferred
Brent, close	92.44 USD/bbl, 16 November	−15.86% relative to 16 October; +0.90% relative to 19 August	Point changes roughly 30/90 days apart, not a change in monthly averages.
Poland, "Gasoline Prices" series	1.77 USD/l, October	2.03 USD/l in September; change −12.81%	Monthly Europe's Energy Portal data in the provider's database; not to be equated with the current Pb95 price in PLN or with the price at a specific station.
Gas in storage	35.3257 TWh, 14 November	36.4115 TWh on 18 October; difference −1.0858 TWh	The last two days of the main window are not covered.
90-day storage background	32.9943 TWh, 19 August	To 14 November +2.3314 TWh	Stocks higher than in August, though lower than in October.
Gas since the end of October	36.5528 TWh, 31 October	To 14 November −1.2271 TWh	The decline alone does not settle the cause or indicate a shortage.
Capacity and fill	36.85 TWh; approx. 95.86%, 14 November	Capacity from a separate snapshot series, stock from a more precise historical series	An indicative measure; it does not replace the withdrawal rate from storage.

Gas in storage — reading points



Reading points, not a continuous series. 14 November: approx. 95.86% fill — not a number of days of autonomy.

Readings from the series attributed to GIE in the data provider's database; capacity from a separate snapshot series.

Items without comparable data

Item	Reading	Comparison	What can be inferred
Pb95 and diesel, retail PLN/l	n.a.	n.a.	No comparable 30/90-day series.
Pb95/diesel wholesale, heating oil	n.a.	n.a.	No current price and margin series.
Wholesale gas TTF/TGE and retail PLN/kWh	n.a.	n.a.	Not replaced with the US Henry Hub.
Electricity: TGE (Polish Power Exchange) and retail bill	n.a.	n.a.	The spot market was not equated with the household tariff.
Physical stocks of crude and products, days of cover	n.a.	n.a.	Gas stock is not a proxy for diesel stock.

Data provenance

The numerical price and gas data come from a structured financial data provider which, in its metadata, names the original institutions: GIE for gas storage and Europe's Energy Portal for petrol. The GIE metadata refer partly to ALSI and partly to AGSI — an additional point to verify before operational use, not independent confirmation of each reading. For petrol, Europe's Energy Portal is given. These are institutional addresses, not fixed archived readings; the exact observations are identified by the citations attached to the values in the register accompanying the report.

Technical capacity vs actual supply

10 bcm/year
DK→PL capacity
(Baltic Pipe)

8.3 bcm/year
terminal capacity
at Świnoujście

4.8 bcm
delivered by the terminal to the grid,
as at 18 September

LNG unloading counter: 54 of a planned 78



Parameters and readings from the GAZ-SYSTEM Forum 2026 presentation. Annual capacities and cumulative deliveries are not comparable as a measure of utilisation.

The GAZ-SYSTEM (Polish gas transmission system operator) Forum 2026 presentation shows DK→PL capacity of 10 bcm/year and capacity at the Świnoujście terminal of 8.3 bcm/year. As at 18 September, the terminal had delivered 4.8 bcm to the grid, and the stated unloading counter stood at 54 of a planned 78 (GAZ-SYSTEM, gas year 2026/2027). The document has no established exact publication date and also contains plans; only clearly dated readings and technical parameters were used — not as a measure of November flows (GAZ-SYSTEM).

ANALYTICAL INFERENCE

Nominal capacity must not be treated as a guaranteed quantity of gas or as spare reserve. Assessing the effects of an import interruption requires, at the same time: nominations, physical flows, operator constraints, the withdrawal rate from storage, weather and demand.

Conditional shocks and their mechanism

Conditional shock	Mechanism for Poland	Condition for assessing a shortage
A Russian refinery	A potential change in product supply and margins on the regional market; not an automatic loss of supply to Poland	Data on product exports and margin prices are needed, not just a photo of the fire.
A Russian export terminal	Possible impact on crude flows, freight and product availability	Confirmed undelivered volume and duration of the outage.
Baltic Pipe or LNG	Direct loss of one import channel	A daily balance including alternative entry points, stocks and demand.
The power grid	Local outages may occur without a national energy shortfall	Grid status and backup supply options, not the spot price indicator alone.

RATIONING

The material collected provides no basis for treating rationing as the base case for Poland. Nor is there justification for a simple “only after the loss of two channels” rule: a single failure can be severe locally, while the national scale depends on its location, timing and the possibility of replacing supplies.

D Food and water

Food: transit is not import dependence

Area	Figure and trend	Limits of interpretation
"Food Inflation" series, Poland	August −0.9%, September −0.4%, October −0.1%	Values from the provider's series attributed to GUS (Statistics Poland); the base in the metadata is unclear, so they were not described as m/m changes or as changes in a specific basket.
Rail direction: Poland	At the end of October, 78 grain wagons per day, almost 5,000 t/day, +12.5% on September (Agro Profil citing Ukrzaliznytsia/RAIL.insider)	Data on the direction of carriage, not evidence of sales on the Polish market.
All western rail directions discussed	337 wagons per day against approx. 280 in September, an increase of 57 wagons (Agro Profil)	An operational average from the end of the month, not an October total.
Transit through Poland, January–October	Approx. 1.2 million t of products covered by the import ban, including approx. 653,000 t through ports, according to a reply from MRiRW (Ministry of Agriculture and Rural Development) quoted on 12 November (Gospodarz.pl)	An indirect source, without the primary customs table; a set broader than grain alone.
Wheat, maize, feed: price and UA/RU import share of consumption in Poland	n.a.	Dependence was not calculated from transit alone.
Meat, oils, vegetables: prices in PLN and 30/90-day change	n.a.	No consistent basket or series of the required currency.

Grain wagons per day, all western rail directions discussed



Operational end-of-month average, not an October total; direction of carriage, not evidence of sales in Poland.

Based on Agro Profil citing Ukrzaliznytsia/RAIL.insider.

ANALYTICAL INFERENCE

The available data point to more freight heading towards Poland, not to a proven increase in consumption dependence on Ukrainian food. The pass-through of disruption to prices should be tested separately — via the costs of fuel, fertiliser and refrigeration, the availability of feed and the substitution of supplies. Import shares were not estimated without customs data.

SECTOR SCENARIO

The low case means normal availability and seasonal fluctuations; the base case, isolated delays and higher transport costs; the high case combines longer logistics disruption with energy problems and poorer availability of selected components. There is no basis for equating the high case with a nationwide food shortage.

Water: vulnerability is not evidence of contamination

An audit by NIK (Supreme Audit Office) published on 27 August, covering eight operators in the energy, water and transport sectors, found inadequate safeguards; six operators systematically ignored critical alerts. The period examined covered 2021–2025 and activities up to February 2026 (NIK). This is the result of an audit of a specific sample, not a measure of the share of all vulnerable waterworks in Poland or the number of successful attacks in the last 30 days.

The materials examined did not confirm war-related contamination of the Vistula, the Oder or a large Polish water intake in the main window. This means no verified case in this search, not proof that one is impossible. The lack of a full laboratory series means `n.a.` for the trend in concentrations and the number of exceedances of standards attributed to the war.

SERVICE SCENARIO (OWN ASSUMPTIONS)

The low case assumes no outage; the base case considers a local loss of supply of up to 24 hours due to a power or IT failure; the high case 24–72 hours or longer in a single system if a treatment process is damaged. Information about contamination should be accepted only after a consistent statement by the operator and the sanitary inspectorate, or a test result — not on the basis of a video of a control panel.

E Infrastructure and logistics

What has a measurable effect

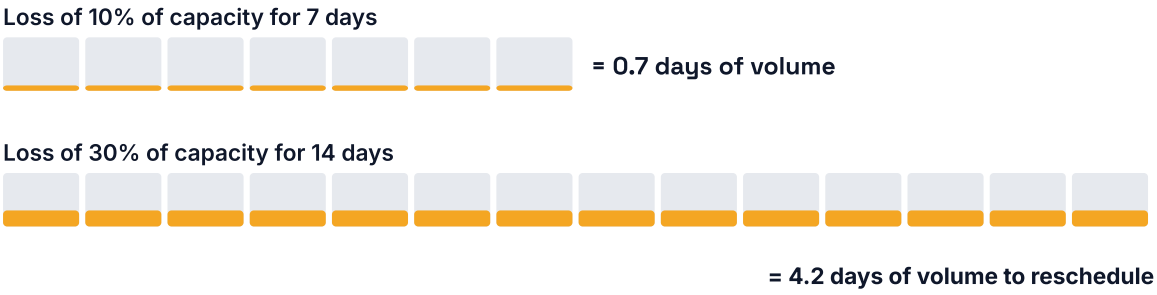
- **Ukraine: energy and bridges.** OSW described repeated strikes on the same facilities on 3–10 November and more than 600,000 customers without power in Dnipropetrovsk oblast on 8 November; restoring supply in Dnipro took more than 24 hours. ISW pointed to an intensification of attacks on bridges over the Dnipro since October (OSW, ISW).
- **Port of Gdańsk.** Data for January–September published on 27 October: 65.2 million t against 59.1 million t a year earlier, including liquid fuels of 29.4 million t, about 45% of the total; grain 2.1 million t, +33% y/y (Port Gdańsk).
- **Mika — an update on an old case.** A summary of the PKBWK (State Commission for Railway Accident Investigation) report describes 11 trains that ran over the damaged track after the sabotage in 2025. This is new information about the system's response, not a new incident in November 2026 (Rynek Infrastruktury).
- **Border with Belarus.** A communiqué from MSWiA (Ministry of the Interior and Administration) of 31 August extended the buffer zone for 1 September–29 November. The 335 border-crossing attempts it cited related to 1 January–2 August, so this figure was not used to assess October and November (MSWiA).

ANALYTICAL INFERENCE

The growth in port throughput shows sustained activity in the period covered by the statistics, but does not prove that spare capacity exists in November. No complete 30-day series of clearance times, train numbers and downtime at Polish hubs was obtained; the impact on Polish lead times remains quantitatively n.a.

A logistics test, not an observation

With even operation, losing 10% of capacity for 7 days means 0.7 days of normal volume to be shifted to other dates or routes; losing 30% for 14 days means 4.2 days of volume. This is not a forecast of the delay to an individual shipment, which depends on queues and the alternatives available.



Each tile is one day; the fill shows the lost share of capacity. Arithmetic of the test, not a measurement.

SECTOR SCENARIO

The low case covers isolated restrictions lasting hours; the base case, local disruption of up to 1–3 days; and the high case, a multi-day outage of several interdependent services. The report does not identify current military routes, protection parameters or operational weak points of facilities.

F Escalation, Belarus and service assessments

Assessments based on specific premises

Premise	What is known	What does not follow from it
VDD: cross-border recruitment	On the basis of the Threod case and its own information, the service assesses that in 2026 Russian services increasingly recruit third-country nationals for sabotage in another country; the aim is to make it harder to show a link to Russia (VDD).	No percentage probability of an attack on Poland and no full annual data are given.
BELPOL: industry	On 12 November BELPOL reported that at least 120 Belarusian companies are fulfilling Russian defence orders and cited a letter from MZKT's management in its possession (BELPOL, post 1541).	The report contains no independently reconstructed list of all the companies, nor a measure of growth since August.
BELPOL: missiles	On 13 November it described a Chinese machine tool worth more than USD 1 million, work on components for Uragan rockets, and a delivery of fuel components in July after a delay of more than six months (BELPOL, post 1547).	No verified production volume, no confirmation of serial deliveries and no evidence of a new deployment of ballistic missiles.
BELPOL: militarisation	Material of 12 November announces an analysis of hundreds of documents concerning railways, airfields, communications and industry (BELPOL, post 1540).	An announced analysis alone does not prove readiness to join the war directly.
HUR — indirect information from the 90-day background	A publication indexed with the date of 7 September attributes to HUR a report on sub-units of the 101st brigade with Oreshnik and on relay stations; the text does not give the exact date of the statement and does not make the evidence available (UkrMedia).	It was not accepted as a new, confirmed deployment in the last 30 days.
GenStaff — latest verified report	16 November: no signs of offensive groupings forming on the Volyn and Polissia axes (GenStaff).	It does not cover all potential preparations against NATO states and does not rule out covert operations.

ANALYTICAL ASSESSMENT

Sabotage, cyber activity and air incidents are a mechanism of pressure documented more directly than preparations for an open land attack on Poland. No current, auditable assessment by NATO or allied services was found that assigns such events in Poland a specific percentage probability for the next month. Values such as “70%” would be the author’s own construct, not an intelligence assessment.

The Suwałki Gap

Lithuanian reports of 11 November mention Druskininkai and an alleged episode on the Polish side, while DORSZ did not confirm a violation of Polish airspace (LRT, Onet/DORSZ).

ANALYTICAL INFERENCE

This justifies joint monitoring of airspace, transport, GNSS and information, but it is not evidence of an operation to cut off Lithuania.

A more significant warning than any single post would be the simultaneity of several independently confirmed changes:

lasting transport disruption

cyber and kinetic activity

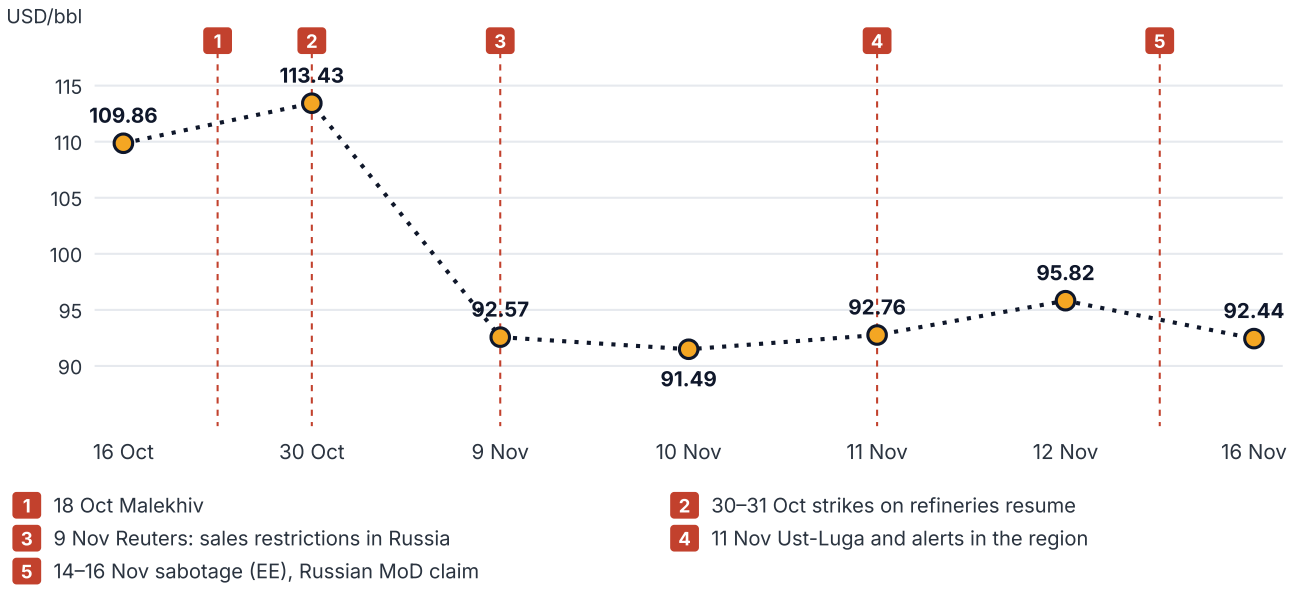
unusual military and logistical preparations

Specific monitoring thresholds are given in the final table (chapter “Monitoring until the next edition”). They are working thresholds, not secret intelligence indicators.

G Events vs prices and risk

A timeline, not proof of causation

The chart sets the Brent crude readings given in the report against the dates of the events described. The dashed line only connects reading points — it is not a continuous price series. Coincidence in time does not imply a causal link.



Brent, closes in USD/bbl (points given in the report) and numbered events. Spacing between points is not proportional to elapsed time. Price source: financial data provider.

Brent fell from 113.43 USD/bbl (30 October) to 92.57 USD/bbl (9 November), i.e. during the renewed campaign of strikes on Russian refineries. Individual sessions after the events of 11 November brought rises (+1.39% and +3.30%), and 16 November a fall of 3.55% compared with Friday.

Date	Event	Price / operational observation	Assessment of the link
18 October	Damage to a logistics facility in Malekhiv (RBC-Ukraine)	No parallel, verified reading of a Polish price or delivery time.	Local effect; impact on Polish prices n.a.
30–31 October	Resumption of strikes on Russian refineries after the pause described (KAS)	Brent on 30 October: 113.43 USD/bbl; 9 November: 92.57 USD/bbl.	A fall during the campaign contradicts the simple assumption that every attack must push up the oil price. It does not prove there was no impact on diesel margins.
9 November	Reports on refineries and sales restrictions in Russia (Reuters)	Brent 92.57 USD/bbl; the next day 91.49 USD/bbl.	A physical effect on the Russian market described by local sources; transmission to Polish retail not measured.
11 November	Strike on Ust-Luga and alerts in the region (Radio Svoboda, LRT)	Brent 92.76 USD/bbl, +1.39% on the previous session; 12 November 95.82 USD/bbl, +3.30%.	Coincidence in time; without controlling for other events and the exchange rate, the price move was not attributed to the attack.
14–16 November	Foiled sabotage in Estonia and a Russian claim of a record number of drones intercepted (VDD, AP)	Brent on 16 November 92.44 USD/bbl, −3.55% compared with Friday.	No simple pattern of a positive reaction to escalation; this does not prove a calming effect.

DEMONSTRATED EFFECT

Damage to facilities, Russian fuel sales restrictions and Baltic transport disruption — within the limits of the stated quality of evidence.

UNDEMONSTRATED EFFECT

A specific number of grosz per litre in Poland, a rise in the Polish food basket, or a percentage probability of sabotage resulting from a single event.

No correlation coefficient was calculated from a selective list of incidents, because there is no complete exposure series and no comparable daily Polish prices. A proper next iteration should use daily price returns, the dates and times of events, transmission lags, the USD/PLN rate, product prices and margins, weather and other global disruptions; a benchmark or counterfactual model is also needed.

Scenarios for the next month

How to read the figures

The scenario horizon is 17 November–16 December 2026. The ranges are the author's stress tests — not econometric estimates, confidence intervals or service assessments. The price change refers to the hypothetical current retail price of a given product; because a full current base in PLN was not confirmed, no fictitious levels in PLN/l are given.

Working scale of infrastructure effects

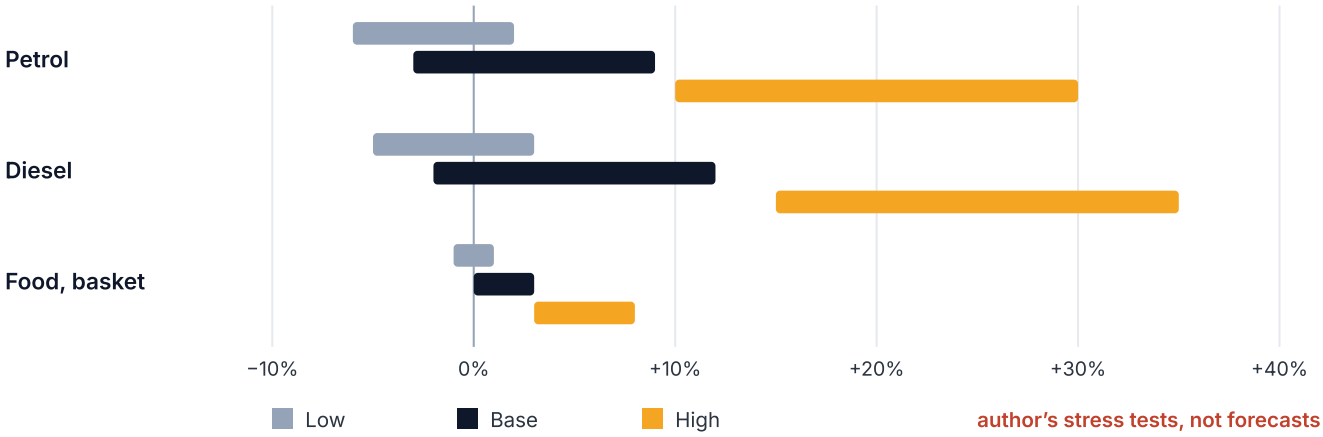


The arrows show the level assigned to each case.

The infrastructure scale is a working one: 1 means no significant disruption, 2 — isolated brief restrictions, 3 — local disruption lasting 1–3 days, 4 — several interdependent multi-day disruptions, and 5 — a systemic crisis. It is a scale of effects, not an official alert level.

Cases: low, base, high

Scenario	Assumptions: Ukraine / Baltic / Poland	Petrol and diesel, retail	Food, retail basket	Infrastructure and social effects
Low	No lasting loss of Polish capacity; Baltic incidents limited in time; no cumulative supply shock. Assumption: Brent −10–0%, USD/PLN −2–+1%.	Petrol −6–+2%; diesel −5–+3%.	−1–+1%.	Level 2/5; brief alerts and disruptions, no grounds for rationing.
Base	Continued attacks on Ukrainian rear areas, recurring alerts in the Baltic, a possible local cyberattack or sabotage without a lasting loss of a key supply channel. Assumption: Brent −5–+10%, USD/PLN 0–+3%.	Petrol −3–+9%; diesel −2–+12%, with a higher product premium.	0–+3%.	Level 3/5; local outages of 1–3 days, extra costs for carriers, risk of panic buying.
High	Simultaneous or prolonged damage to transport and energy, a regional loss of product supply, further confirmed incidents in NATO states; the scenario does not require assuming a full-scale invasion. Assumption: Brent +15–+35%, USD/PLN +5–+10%, an additional logistics premium.	Petrol +10–+30%; diesel +15–+35%.	+3–+8%; individual goods may exceed the basket.	Level 4/5; multi-day local shortages and prioritisation of supplies; industrial restrictions possible under certain conditions, nationwide rationing is not automatic.



Ranges of retail price changes in the three cases (the author's stress tests).

The fuel ranges illustrate pass-through on the assumption that the share of the retail price sensitive to crude and the exchange rate is, as a working figure, 35–50%, with an additional, variable product and logistics premium. The simplification takes the form:

retail change ≈ sensitive share × [(1 + crude change) × (1 + FX change) − 1] + premium change

The share and the premium have not been estimated on current tax or margin data. The food ranges are an independent cost-and-availability test, not a mechanical conversion of the rise in the diesel price. Without cost shares and component prices there is no honest basis for greater precision or for assigning numerical probabilities to the cases.

Gas, power and water in the same cases

Service	Low	Base	High
Gas	Normal continuity, stocks as a buffer	A brief drop at one entry point offset by the balance	A longer shortfall at entry points during high demand; a possible reduction in industrial offtake only after assessing the balance
Electricity	No significant outages	A local failure of up to 24 h as a test assumption	Multi-day outages in the areas affected by damage
Water	No outage assumed	Locally up to 24 h	Locally 24–72 h or longer, depending on the damage
Gas and power prices	n.a. for a quantitative forecast	n.a.	n.a.; no current base or tariff model

Comparison with the 18 October edition

The previous edition was found in the archive, but its text does not contain addresses assigned to the former numbered footnotes that could be re-verified. The comparison of assessments is therefore editorial, and the former retail price levels and loss balances are not treated as an independently verified series (source: archived October edition).

Area	Change in the November edition
Baltic	Instead of a lack of numerical documentation, there are now dated episodes from Latvia, Lithuania and Estonia and the separate Threod case; a full regional balance was not, however, reconstructed (LSM, VDD).
Front line	The new DeepState windows show small Russian net gains, but they are not methodologically identical to the September ISW balance cited previously; no "m/m change" was calculated by subtracting different maps (RM).
Gas	Comparison in the currently obtained, consistent series: 36.4115 TWh on 18 October and 35.3257 TWh on 14 November, i.e. −1.0858 TWh.
Fuels	The current series in USD/l is not directly comparable with former prices in PLN/l; a m/m comparison of Polish retail prices remains n.a.
Scenarios	The previous ranges were replaced with a test with explicit assumptions on crude, the exchange rate, the horizon and data quality; a difference in the ranges is not a measure of an increase or decrease in the threat.
Updates	Further editions are planned monthly; the reference point is to be the consolidated register accompanying this report.

Monitoring until the next edition

All thresholds in this section are analytical proposals. They are not official procedures of operators, services or NATO; crossing them triggers verification, not an automatic public alarm.

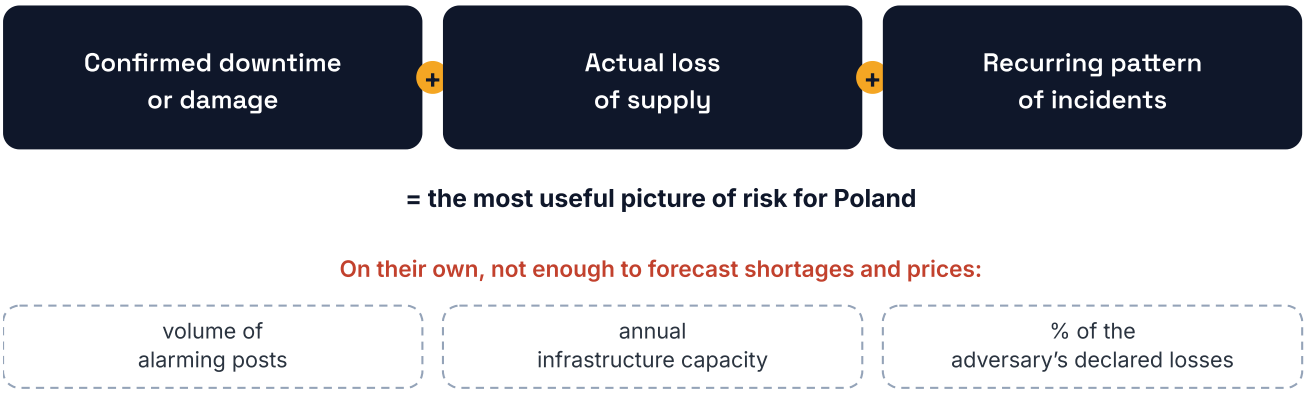
Indicator	Frequency and baseline source	Working warning signal	How to filter out a false alarm
Long-range drones / missiles / KABs	Daily: original GenStaff and Air Force channel; monthly: KAS (GenStaff, Air Force, KAS)	7-day average for the category more than 30% above the previous 28 days; number of hits tracked separately	Fixed definition; do not add FPVs to Shaheds; include daytime attacks.
Western Ukraine	After each event: DeepState and local reports checked against the administration (DeepState, example of Lviv documentation)	Two confirmed strikes on logistics or energy in the western oblasts within 72 h, with actual downtime	Geolocation of the impact site; an oblast alert alone is not enough.
Confirmed incidents in NATO states	Ongoing: statements by the relevant military, LRT/LSM/ERR (LRT, LSM, ERR)	Two independent incidents within 7 days, or one causing damage to infrastructure	Separate overflight, alert, debris and defensive fire; do not count one drone three times in three countries.
Sabotage	Ongoing: authorities handling the cases; Telegram only as a pointer (VDD)	Two confirmed events targeting a related sector within 14 days	Fire ≠ sabotage; attribution only on the basis of evidence from the authority or investigation.
BELPOL / militarisation of Belarus	Weekly: documents and original posts (BELPOL)	New documents on capabilities, confirmed by dated imagery or a second independent channel	Establish the date of the document and of the event; do not equate a factory order with an order to attack.
GNSS	Daily: identical area and coverage (GPSInterference)	Share of affected observations more than 50% above its own 28-day average for 3 days	Minimum number of observations and coverage; operational confirmation; no automatic attribution.

Indicator	Frequency and baseline source	Working warning signal	How to filter out a false alarm
Gas storage	Daily: TWh, withdrawal rate and temperature; GIE series specified in the register	A decline above 0.5 TWh/day for 3 days requires checking the weather and the balance; it is not in itself a shortage alarm	Separate fill, withdrawal rate and demand; account for data corrections and reclassifications.
Baltic Pipe and LNG	Daily: physical flows and operator constraints (GAZ-SYSTEM, entry structure)	A flow drop of more than 20% against a comparable 7-day average for more than 24 h, with no planned maintenance	Nominations and the maintenance plan, not nominal capacity alone.
Fuels	Daily: wholesale PLN/m³ and retail PLN/l, Brent, USD/PLN and margins; currently the full set is n.a.	Wholesale +5% within 5 sessions with a simultaneous rise in the diesel premium or a signal of product non-delivery	Check taxes, the exchange rate and the global crude price; do not attribute everything to the war.
Food / feed	Weekly: the same basket, units and origin; currently the detailed series is n.a.	Group price +5% within 4 weeks and an independent signal of limited availability	Seasonality, promotions, changes in quality and supplier; transit is not import.
Rail, borders and ports	Daily: hours of downtime, median and P90 clearance time, throughput; monthly: operator data (Port Gdańsk)	P90 clearance time more than twice its own 28-day average for 2 days, or a confirmed interruption longer than 12 h	Code maintenance, weather, protests and failures separately from hostile action.
Water	Statements by the operator and the sanitary inspectorate, laboratory tests	Any confirmed parameter outside the standard, or loss of supply for more than 6 h	A video of a SCADA interface or an anonymous post does not prove contamination.

The gaps that matter most

- **Prices.** The lack of a current, common PLN base for fuels and a detailed food basket prevents a full 30/90-day comparison and the attribution of impact to specific events.
- **Energy supply.** The lack of a complete set of daily flows, spare capacity, demand and storage withdrawal rates prevents a reliable calculation of “days to rationing”.
- **Front line and losses.** No full export of maps for the start and end of the window and no independently de-duplicated register of losses on both sides.
- **Incidents.** Incomplete Telegram archives, inconsistent classifications and the dependence of many publications on a single report.
- **Cyber and water.** No full, sector-by-sector, public 30-day balance; a vulnerability audit is not a current statistic of successful attacks.
- **Intelligence.** No public, quantitative, short-term assessment of the probability of an attack on Poland; general warnings and leaks without data were not used as a substitute.

Final conclusion



The most useful picture of risk for Poland comes from combining confirmed downtime or damage, an actual loss of supply and a recurring pattern of incidents. The volume of alarming posts, the annual capacity of infrastructure or the percentage of the adversary’s declared losses are not, on their own, enough to forecast shortages and prices.

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41 addresses in thematic groups, exactly as given in the source. Automated availability check on 17 November 2026: 34 addresses responded correctly; AP, Reuters, ISW, KAS, LSM and Onet rejected the automated request (bot blocking), and the gov.pl server (MSWiA) was unavailable at the time of the check. No addresses were changed.

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