

Baltic wind.

Clean energy for Central and Northern Europe

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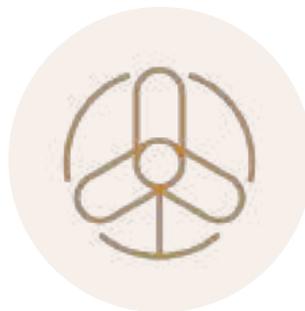
Strengthening Policy and Governance Capacity for Blue
Energy in Central and Eastern Europe

Baltic offshore is just taking off

Clean energy for tens of millions people

Offshore wind turbines have **high capacity factors** due to technical advantages and more consistent wind conditions. They are **not affected by the spatial planning controversies** that limited the development of onshore wind in many countries, and have **better production profile** than solar power (esp. in northern, cloudy areas, such as around the Baltic). Offshore wind became cost-competitive due to **technological advancements** and **EU ETS**.

Baltic offshore plans



2.6 GW

Currently installed in Germany and Denmark



19.6 GW

Minimal target for 2030 in the Baltic Sea by the EU countries

Source: Marienborg Declaration

Baltic power

Development of offshore wind energy on the Baltic Sea is following the footsteps of North Sea.

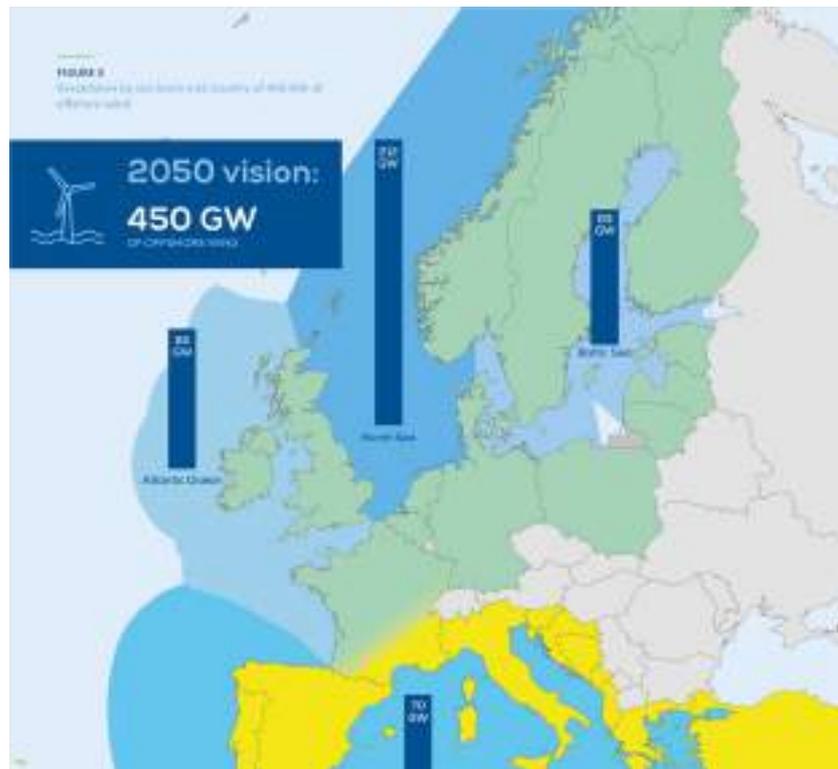
Up to 80-90 GW potential

Population and industrial centres

Average depth of only 55 m

Hybrid projects in western Baltic

Offshore wind for CEE



Source: WindEurope, *Our energy, our future*

National overview

Country	Offshore capacity	Current situation	Plans and goals
Germany	1 098 MW	Two adopted legislative frameworks - Spring Package and Summer Package - will accelerate the development of offshore wind by shortening the permitting process and ensuring sufficient sites are available.	4 GW forecasted for 2030 as most of their offshore wind farms is to be built in the North Sea. The overarching objective is 30 GW in both of these basins.
Denmark	1 532 MW	The most experienced country with a transparent and proven legal framework. It is interested in creating hybrid projects with Germany.	5.4 GW forecasted for 2030, around half of what is expected in general, incl. the North Sea.
Sweden	192 MW	Due to specific regulations Sweden has a number of competing projects under development, applying for permits in a complex process. Offshore has been identified as an enabler to reduce reliance on Russian fuels.	8.7 GW forecasted for 2030 - the most ambitious goal in the Baltic Sea.
Finland	71 MW	The development is at the very beginning and hampered by complex administrative procedures. Falling LCOE has attracted several investors. New capacity is expected no sooner than in 2028.	5.1 GW forecasted for 2030, but there are several significant projects at the early development stage.
Baltic states	None	In Lithuania some needed regulations are in place, but there is only one project in pipeline. Latvia is focused on exploiting its onshore potential first, having one planned project with Estonia where the growth of offshore is projected post-2030.	4.1 GW forecasted for 2030, with 2.9 GW in Estonia, 0.7 GW in Lithuania, and 0.5 GW in Latvia.
Poland	None	Investors are competing for locations and two-side Contracts for Difference. Necessary infrastructure is at the very early development stage.	First 3 GW to appear by 2027 (possible delays), 5.9 GW planned for 2030 and 11 GW for 2040.

Key challenges in Poland



Regulatory framework

Offshore investments require efficient permitting and stable legal environment.



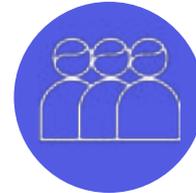
Building infrastructure

Harbours and logistic chains to support wind farms development are delayed.



Grid access for offshore

Large investment necessary, some tensions between different RES and nuclear.



Bidding process

Controversies about alleged better treatment of state owned companies.



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Thank you!