Gdańsk 2025 Baltic Sea Offshore Wind Summit

First International Baltic Sea Wind Industry Gathering

Baltic Sea Offshore Wind Summit 2025 in Gdańsk

Special Report

Leading Partners:

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INTRODUCTION

Dear Readers,

It is my pleasure to introduce this special report summarising the Baltic Sea Offshore Wind Summit 2025, held on March 10th at the European Solidarity Centre in Gdańsk. This landmark event brought together more than 200 leading voices from across the offshore wind sector—government representatives, industry experts, innovators, and policymakers—united by a shared vision: to strengthen the role of the Baltic Sea as a driving force in Europe's clean energy transition.

This year's summit stood out not only for its timely focus on energy security, infrastructure development, supply chain independence, and workforce innovation, but also for its recognition of historic achievements. The inaugural Baltic Wind Award honoured the successful synchronisation of the Baltic States with the European energy grid—an essential step towards full energy sovereignty and resilience in the face of geopolitical challenges.

The discussions held in Gdańsk underscored the enormous potential of the Baltic Sea region to lead Europe in offshore wind development. With ambitious national targets, such as Poland's plan to reach 18 GW of offshore capacity by 2040, and Lithuania's commitment to expanding its renewable

portfolio, the region is poised to become a centre of innovation, investment, and sustainable growth.

As we look ahead, I warmly invite you to join us for the next edition of the summit, which will take place in Brussels in November 2025. This next chapter will focus on the EU agenda for offshore wind energy, and is designed to bring together key industry stakeholders and EU decision-makers from across the Baltic Sea countries. It will provide a vital platform to align national efforts with European policies, foster collaboration, and accelerate investment in this strategic sector.

Warm regards,

Krzysztof Bulski
Managing Editor
BalticWind.EU

Brussels 2025

Baltic Sea Offshore Wind Summit

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Baltic Sea Offshore Wind Summit 2025: An important step for the region's cooperation

OPENING ARTICLE

The Baltic Sea Offshore Wind Summit 2025, held at the European Solidarity Centre in Gdansk, was an important event for offshore wind development in the Baltic Sea region. Aimed at fostering regional coordination, the programme addressed key issues including energy security, infrastructure development, technological innovation and human resource development.

Award for Energy Integration

The summit opened with the presentation of the first 'Baltic Wind Award,' honouring the historic integration of the Baltic States into the European energy grid. This momentous achievement marks the severing of long-standing ties with Russian and Belarusian networks, strengthening European energy security. Lithuania, Latvia, Estonia, Poland and the European Commission were jointly honoured for this strategic achievement. **Dan Jørgensen, EU Energy Commissioner**, praised the synchronisation as a 'historic event for the European Union' and highlighted the European Commission's financial commitment of more than €1.2 billion to support grid integration. 'This would not have been possible without the strong cooperation of the countries in the Baltic Sea Region and the full political, technical and financial support of the Commission, working together with the Member States to make the Energy Union our common reality' - **said Commissioner Jørgensen**.

Ambassador of Estonia to Poland Miko Haljas accepting the Baltic Wind Award

Key Pillars for Discussion

The summit brought together more than 200 international participants, including industry leaders, policy makers and experts, who took part in discussions across ten panels and keynote presentations. The event focused on four key pillars:

- **Security**: Participants highlighted the key role of offshore wind energy in strengthening energy security and reducing dependence on fossil fuels. Jerzy Buzek, former Prime Minister and President of the European Parliament, stressed that an efficient energy system is essential for European defence and industry. 'We do not want to pay billions of euros for energy supplies to a state ruled by an aggre-ssive despot like Putin. That is why energy development and protection are crucial,' Buzek said.
- **Infrastructure**: Discussions focused on the development of a robust energy infrastructure to support the develop-ment of offshore wind energy.
- **Supply Chain**: The importance of creating a strong and independent supply chain for offshore wind energy was emphasised. Jerzy Buzek stressed the need for the EU to be independent from external production in all parts of the supply chain. 'We need to mobilise much more resources under the multiannual financial framework.

We cannot rely on favourable winds for security, we have to rely on ourselves. The time for action is now' - he concluded.

- **Workforce and Innovation**: The summit addressed the need for skilled professionals and technological advances to drive the offshore wind sector.

Baltic Sea: the Wind Energy Centre

The Baltic Sea region is fast becoming the main investment location for offshore wind energy, alongside the North Sea. Commissioner Jørgensen highlighted Poland's ambitious plans. to significantly increase its offshore wind energy capacity, predicting that Poland could account for almost half of the total offshore wind energy capacity in the Baltic by 2040. **Paulina Hennig-Kloska, Minister for Climate of Poland**, emphasised that offshore wind energy in the Baltic is not only an opportunity for clean energy, but also a boost for energy security and economic development across the region. 'Offshore wind energy is the key to energy sovereignty and independence from fossil fuels. It is also an opportunity for Polish companies. The development of this sector will create new jobs and contribute to building a green economy in our country' – **she stated**.

Vice Minister of Energy of the Republic of Lithuania Airidas Daukšas accepting the Baltic Wind Award

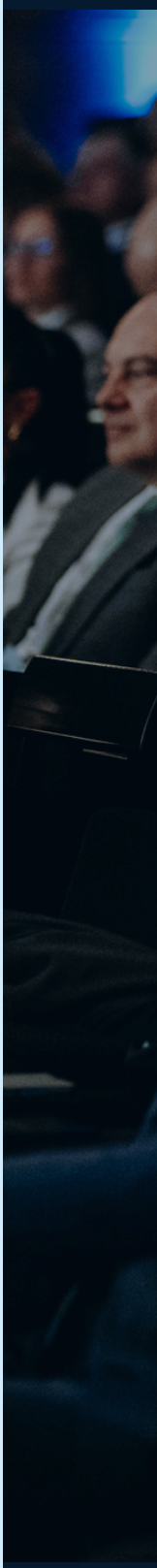
Lithuania's commitment to offshore wind energy

Airidas Daukšas, Deputy Minister of Energy of Lithuania, underlined Lithuania's commitment to the development of renewable energy sources, including offshore wind energy. 'Lithuania has set ambitious targets for offshore wind energy development, aiming to increase energy independence and renewable energy production' - **Daukšas noted**. Lithuania plans to build two offshore wind farms with a total capacity of 1.4 GW and aims to increase the installed capacity of offshore wind energy to 4.5 GW by 2050.

In her speech, **Climate Minister Paulina Hennig-Kloska** emphasised that offshore wind energy in the Baltic Sea is not only an opportunity for clean energy, but also for strengthening energy security and economic development of the entire region. 'Offshore Wind is the key to energy sovereignty and independence from fossil fuels. It is also an opportunity for Polish companies. The development of this sector will create new jobs and contribute to building a green economy in our country' – **said the Climate Minister**.

Hennig-Kloska assured that the Polish government is doing everything to accelerate the energy transition process. 'We want the installed capacity of offshore wind energy to be close to 6 GW by 2030. By 2040, it should already be 18 GW' – **she conveyed**.

Touching on the programme to build offshore wind farms, Hennig-Kloska pointed out that such investments strengthen energy security and the competitiveness of the Polish economy. 'We have prepared a draft amendment to the Offshore Wind Act, which introduces improvements for projects already underway. It aims to improve the efficiency



and flexibility of processes related to the construction and operation of offshore wind farms. These solutions are intended to accelerate investments so that the Baltic is the centre of our country's economic development, but also the heart of modern energy' - **she explained**.

The climate minister also added that the Polish government is investing in the construction and modernisation of the electricity grid and the development of energy storage to maximise the potential of clean energy coming from the Baltic Sea.

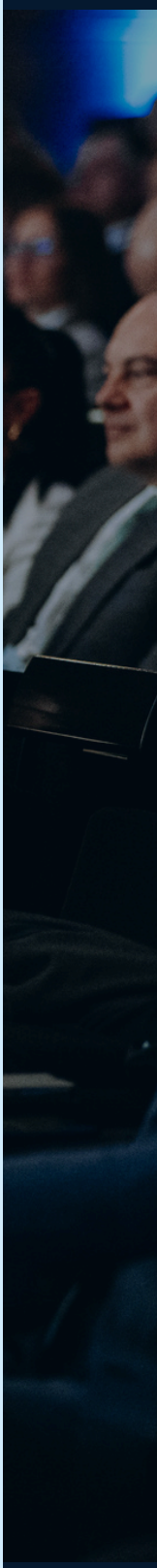
Challenges and Future Directions

While the summit celebrated significant progress in offshore wind development, it also touched on the challenges that lie ahead.

Giles Dickson, CEO of WindEurope, called for continued changes in European policy to ensure consistent support for offshore investment. He highlighted EU regulations that offer bonuses to companies switching to clean energy, provided the energy is produced locally, arguing that this excludes offshore farms if the green energy consumer is far away. Dickson stated:

‘It cannot be the case that the Commission only supports wind or solar energy that is produced nearby. Not everyone has the capacity to do that; that is bad for offshore wind energy. I appeal to you, put pressure on the Polish government not to agree to such regulations.’

Janusz Gajowiecki, President of the Polish Wind Energy Association, pointed to disinformation and propaganda attacks by Russian services to undermine offshore wind energy projects. He noted: ‘It is well known that Putin hates RES, especially wind energy, because these are energy sources over which he has no influence. Therefore, false information, rumours and half-truths are spread to slow down investment processes. This year we have seen a particular increase in such activity. Unfortunately, these waves of rumours are some- times echoed in various circles and media. And it is important to be aware that these are deliberate provocations on the part of Russia, aimed at undermining the energy security of Europe and Poland.’



Looking to the Future

The Baltic Sea Offshore Wind Summit 2025 demonstrated the importance of collaboration, innovation and strategic planning in moving towards a sustainable energy future. Looking to the future, BalticWind.EU is pleased to announce that the second edition of the Summit will take place in Brussels this October, providing a platform for further dialogue between key stakeholders and EU institutions on integrating the resources of the Baltic Sea region for the advancement of offshore wind energy investments. The Summit will return to Gdansk in 2026, where we will continue to build partnerships and drive progress in this key sector.

Baltic Sea Offshore Wind Summit 2025: Baltic Energy Grid Integration Breakthrough Award Presented

BALTIC WIND AWARD

In a ceremony symbolizing a watershed moment in European energy security, the Baltic Sea Offshore Wind Summit 2025 was inaugurated with the presentation of the first-ever "**Baltic Wind Award**". The award honors the historic integration of the Baltic States into the European electricity grid, severing long-standing ties with the Russian and Belarusian grids. Lithuania, Latvia, Estonia, Poland and the European Commission were jointly recognized for this strategic achievement. Representatives of the four Baltic states received the award on stage.

The summit, held at the European Solidarity Center in Gdansk, brought together decision-makers, industry leaders and experts to discuss Cooperation in the Baltic Region to unlock the huge potential of offshore wind energy. The program,

designed to foster regional coordination, addressed key issues including energy security, infrastructure development, technological innovation and workforce development.

A video of a speech by Dan Jørgensen, EU Energy Commissioner, was a key part of the opening ceremony. He praised the synchronization as a "historic event for the European Union" and mentioned his personal participation in the celebration of "energy independence day" in Vilnius on February 9, 2025.

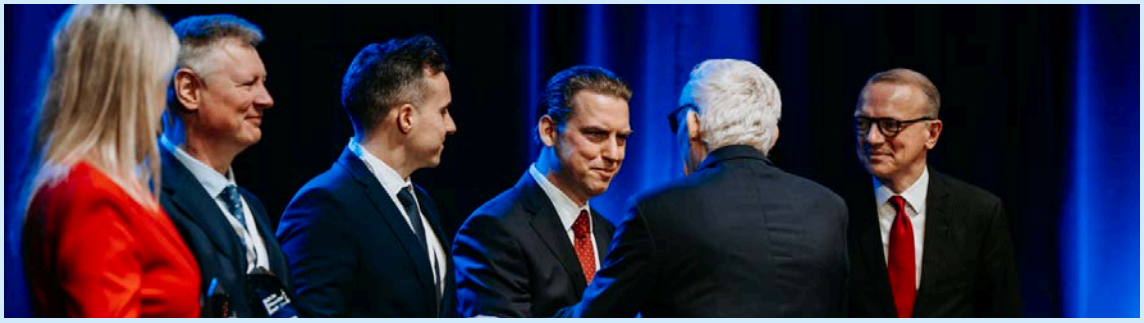
"This would not have been possible without the strong cooperation of the countries of the Baltic Sea Region and the full political, technical and financial support of the Commission, working together with the Member States to make the Energy Union our common reality" - **Commissioner Dan Jørgensen said**, highlighting the collective effort that has gone into the project. He pointed to the European Commission's financial commitment, noting that more than €1.2 billion has been allocated to support grid integration.

The Baltic Wind Awards Ceremony; from left: Krzysztof Bulski, Managing Editor of BalticWind.EU, Jerzy Buzek, Chair of the Advisory Team and Energy Security Advisor for Poland's EU Presidency and Former Prime Minister of Poland & President of the European Parliament, Katrīna Duka-Gulbe, Latvian Wind Energy Association Executive Director, Ambassador of Estonia to Poland, Airidas Daukšas, Vice Minister of Energy of the Republic of Lithuania, and Giles Dickson, CEO of WindEurope.

Looking ahead, the commissioner stressed the strategic importance of the Baltic Sea region for the development of offshore wind energy and green hydrogen corridors. He particularly referred to Poland's ambitious plans to significantly increase its offshore wind power capacity, predicting that by 2040 the country could account for nearly half of the total offshore wind power capacity in the Baltic. In conclusion, Commissioner Jørgensen expressed gratitude for the award and wished the summit participants fruitful deliberations.

The first international summit of the offshore wind industry in the Baltic Sea attracted more than 200 international participants to Gdansk, including leading industry experts in 10 panels and keynote speeches. The event focused on four key pillars: security, infrastructure, supply chain, human resources and innovation.

As highlighted by **Krzysztof Bulski, Managing Editor of BalticWind.EU** and Host of the Baltic Sea Offshore Wind Summit: "I would like to thank all the partners and participants of today's summit. The success of this initiative demonstrates the need to intensify dialogue and cooperation among the wind industry in the region. All the more so as the Baltic Sea, next to the North Sea, is becoming a major area for offshore investment in Europe. Therefore, we are already announcing that the second edition of the summit will be held in Brussels this October, and will return to Gdansk in 2026.



Gdańsk 2025

Baltic Sea Offshore Wind Summit

First International Baltic Sea Wind Industry Gathering

10th of March 2025
European Solidarity Centre
Gdańsk, Poland

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Paulina Henning-Kloska - offshore wind is key to Poland's energy sovereignty

OPINION

The summit was opened by **Poland's Climate and Environment Minister Paulina Henning-Kloska**, who emphasized the key role of offshore wind energy in building Poland's energy sovereignty.

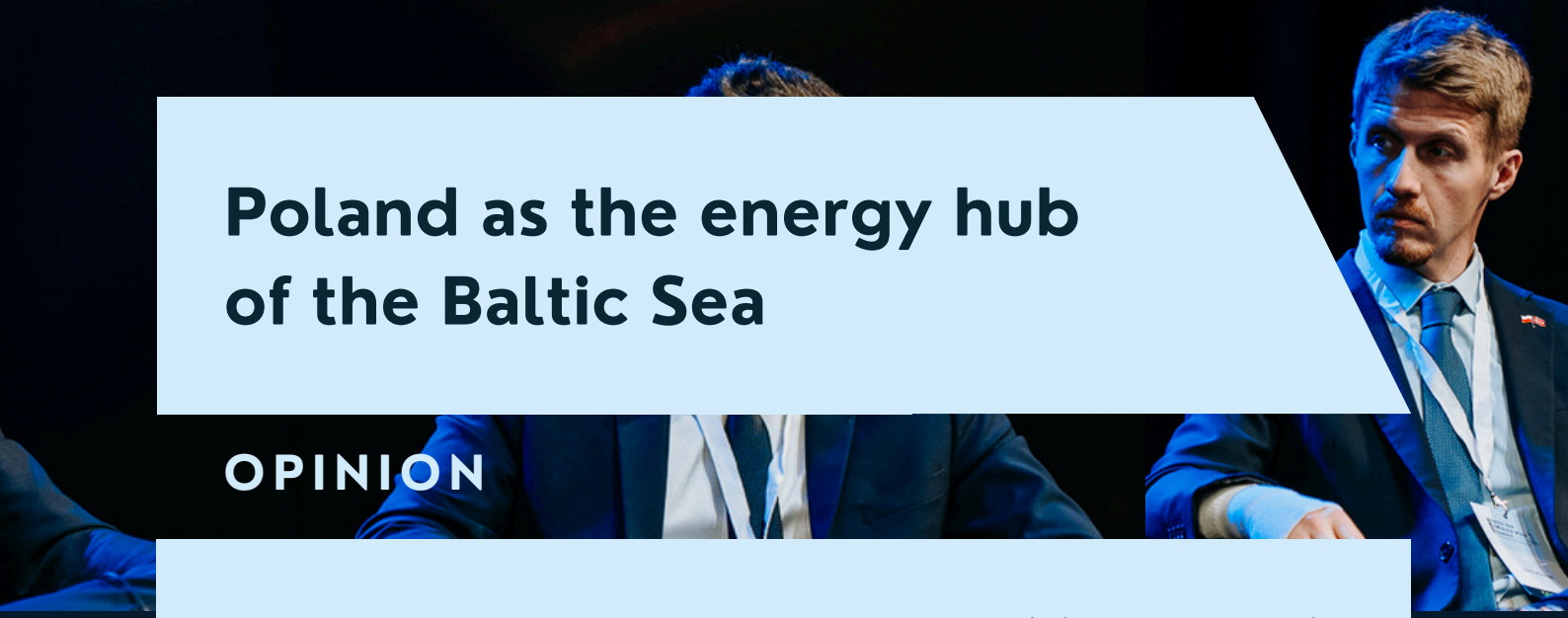
"Offshore wind is the key to energy sovereignty and independence from fossil fuels. It is also a huge opportunity for Polish companies, which are already participating in global projects. The development of this sector will create new jobs in energy, industry and logistics. It will also contribute to building a green economy in our country" – **the minister stated**, stressing the strategic importance of the sector for the Polish economy.

Minister Henning-Kloska pointed to Poland's ambitious plans to achieve offshore wind power installed capacity of nearly 6 GW by 2030 and up to 18 GW by 2040. She noted that the government is investing in the construction and modernization of electricity grids and the development of energy storage to maximize the potential of clean energy coming from the Baltic Sea.

"The Ministry of Climate and Environment consistently supports the development of offshore wind farms and accelerates the energy transition process" – **added the minister**, encouraging cooperation between local governments, businesses, scientists and local communities.

European Energy Commissioner Dan Jørgensen also spoke at the opening ceremony via video, stressing the historic importance of synchronizing the Baltic States with the European energy grid.

"This would not have been possible without the strong cooperation of the Baltic States and the full political, technical and financial support of the Commission, working together with the Member States to make the Energy Union our common reality" – **said Commissioner Dan Jørgensen**, emphasizing the collective effort that has gone into this project. He pointed to the financial commitment of the European Commission, noting that more than 1.2 billion euros have been allocated to support grid integration.



Poland as the energy hub of the Baltic Sea

OPINION

This compelling article, authored by **Niels Frederik Malskær**, Senior Energy Advisor at the Danish Embassy in Warsaw, and **Natalia Zofia Ścięgosz**, Commercial Advisor, Energy at the **Danish Embassy in Warsaw**, delves into Poland's pivotal role in the Baltic Sea's energy landscape. The authors present an engaging analysis of Poland's potential as the region's emerging energy hub, and we encourage you to read on.

Offshore wind in the Baltic Sea has a 30-year legacy. In 1991, Denmark built the world's first offshore wind farm, Vindeby, off the Danish coast. Fast forward to 2026–2027, and Poland is stepping in not just to catch up, but to lead. With cutting-edge technology, gigawatt-scale ambition, and political will coupled with industrial ability, Poland is ready to write the next chapter in the Baltic's renewable future.

The first Polish offshore turbines are set to spin in 2026, each one more than twice the capacity of Vindeby's pioneer farm. Experience from Denmark shows that thanks to continuous innovation and larger turbines, the average offshore wind farm utilization rate has improved by up to 70%. The European Commission estimates the total offshore wind potential of the Baltic Sea region at 93 GW by 2050. Globally, offshore wind capacity surpassed 80 GW at the end of 2024, led by China, the UK, Germany, the Netherlands, Denmark, and Belgium, primarily concentrated in the demanding, windy North Sea.

The energy transformation and the development of low-emission technologies prompt us to pay attention to the Baltic Sea. Poland is now firmly out of the starting blocks to join this global race with ambitious offshore wind targets set for 2040. The Baltic Sea is playing an increasingly important role in the European energy sector, both in supporting the energy transformation and ensuring our energy security.

What does Poland offer the offshore sector?

Poland is poised to take advantage of its strategic location and plans to build 18 GW wind farms in the Baltic Sea before the end of 2040. The first two projects, both owned by large domestic players with international partners have obtained FID and are in the construction phase.

Poland's prime location at the southern Baltic Sea coast, mature port and heavy industrial infrastructure, as well as a growing, skilled workforce gives a strong hand to play. Offshore wind boosts our energy security and energy transition as a large-scale renewable energy source to reduce reliance on coal and external suppliers.

While only around 2,300 km² of the Polish Exclusive Economic Zone (approx. 22,500 km²) are currently designated for offshore development, it already carries massive potential up to 33 GW of capacity; potentially producing an estimated 130 TWh annually according to the Polish Wind Energy Association (PWEA).

Mature industrial base and political commitment

Gdynia, Gdańsk and Szczecin are already prepared or being upgraded, to serve as major installation and service hubs, with several smaller service to host O&M facilities and other

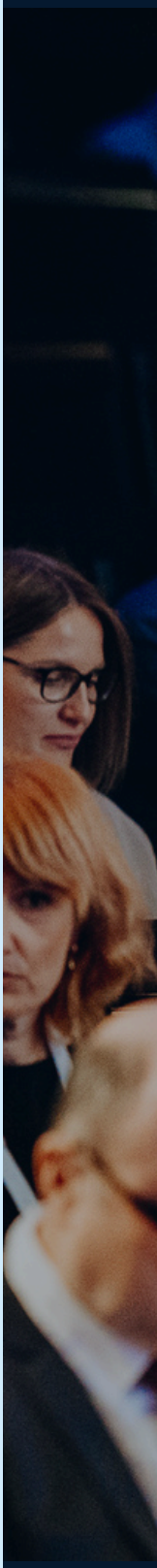
services. On selected sites, construction is underway. Close cooperation with the shipbuilding and heavy industry sectors securing jobs, and economic growth. A number of programs offer cross, or retraining from the steel, coal and shipbuilding sectors, as well as supporting the intake of the thousands of new staff needed to make the offshore dream a reality.

Offshore wind is a key pillar of Poland's energy policy, which aims for 5.9 GW of installed capacity by 2030 and 11 GW by 2040, with the updated Offshore Wind Act scaling this up to 18 GW. Poland provides strong regulatory and policy support for offshore wind development, exemplified by the Offshore Wind Act of 2020, which introduced a two-phase support system based on contracts for difference, along with close integration with EU regulations and funding.

Currently, 19 offshore wind projects in Poland have received location permits (PSZW): 7 under Phase I of the support system (with final investment decisions and construction underway), 12 under Phase II, with auctions scheduled no later than December 2025, and a possible additional round in 2026. Poland's offshore wind ambitions are not without their challenges. One key issue is the administrative complexity of permitting processes, which still require significant streamlining to support faster project delivery.

There is also competition for marine space, particularly with fisheries, biodiversity preservation areas, and busy shipping lanes. Additionally, regional competition poses a challenge, as other countries around the Baltic Sea, including Sweden, Norway, and Lithuania are also rapidly expanding their offshore wind sectors.

Security concerns in the Baltic region may further complicate long-term planning and increase costs. Military considerations



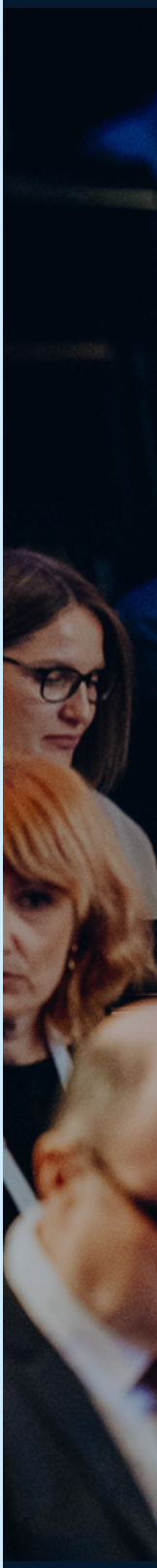
and fluctuations in energy prices have already hindered project development among some of Poland's neighbors.

Despite these obstacles, Poland is not standing still. With 19 projects already in the pipeline, supportive regulation, strong political backing, and a dynamic domestic supply chain, the country is pressing ahead. Poland is not just planning, it is building.

International investment and financing

Poland's offshore wind revolution is attracting major foreign investors and financial institutions. Strategic joint ventures include: Orlen with Canada's Northland Power, PGE with Denmark's Ørsted, and Polenergia with Norway's Equinor. There are also solo projects by Germany's RWE and the company Ocean Winds owned by EDP Renewables and ENGIE. These global players bring not only capital, but also world-class expertise, experience, and supply chain connections. Already some of those projects have secured Final Investment Decisions (FID) and are progressing into construction.

What's more, the sector enjoys strong financial backing from institutions such as the European Investment Bank (EIB) which supports offshore wind as part of its climate investment strategy and the Export and Investment Fund of Denmark (EIFO), which is strongly committed to nearshoring the wind energy supply chain. Commercial banks are also increasingly active offering green bonds, project finance, and syndicated loans tailored to large-scale RES infrastructure. The clear regulatory framework, CfD system, and inclusion of offshore wind in Poland's National Recovery Plan (KPO) have made it an attractive, low-risk investment environment.



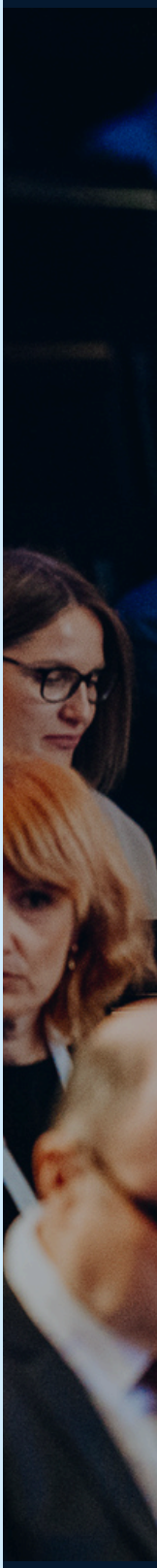
Poland as value multiplier, broader role in Europe

Offshore wind is much more than just the production of green energy at sea. It is the central element of the integrated energy infrastructure that will drive economic development for the entire region, and Poland has a chance to become a hub in several ways.

Firstly, Poland has the chance to become a transmission hub by investing in interconnectors with neighbouring countries. This would make Poland an important centre of energy exchange in the Baltic region much like Denmark is in the North Sea. Poland stands to gain both higher profitability for its new generation capacity at sea and on shore, while strengthening national and European energy security by expanding grid connections with neighbouring countries. Harmony Link (Poland-Lithuania) is a great example, but with EU electricity demand expected to rise by 60% by 2030, and 40% of transmission infrastructure already over 40 years old, Europe will require €584 billion in investments, and cross-border capacity must double. Therefore, opportunities for transnational energy infrastructure across the Baltic should be analysed, like via Energy Island Bornholm.

In the broader EU energy puzzle, Poland plays a key role via ENTSO-E the European network of transmission system operators. Through Polish TSO Polskie Sieci Elektro-energetyczne (PSE), the country is actively involved in grid integration, system balancing, and planning the energy infrastructure of the future.

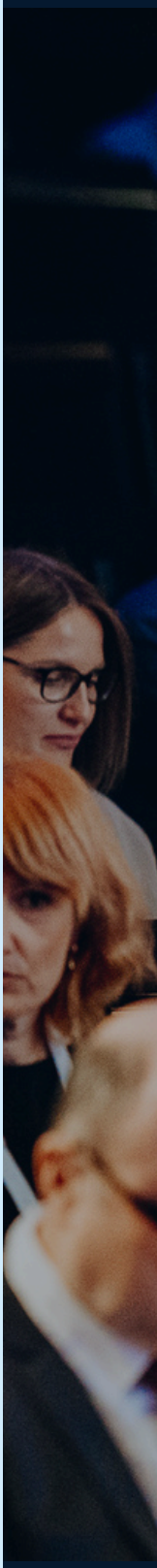
The ORLEN Group and S&P Global Commodity Insights' report highlights the Baltic Sea region's strategic importance for Europe's decarbonization, accounting for over one-third of EU energy consumption and emissions. The region's renewable



energy potential is estimated at 4,400 TWh, significantly surpassing the energy production of the Baltic countries in 2023. Cooperation among the eight regional countries (Poland, Germany, Denmark, Sweden, Finland, Lithuania, Latvia, and Estonia) could accelerate energy transition goals by leveraging this potential. Differences in electricity costs (€15–30/MWh) present trade opportunities. The report estimates a yearly saving of €9bn in power generation if the grids were more fully integrated and able to trade smoothly across markets. Enhanced regional cooperation, including a dedicated working group, cost-sharing mechanisms, and streamlined permitting are some of the suggestions from the report to begin enjoying these benefits.

Copenhagen Call to Action

At WindEurope 2025 in Copenhagen, held from 8–10 April, the European wind industry convened for its largest annual conference and exhibition, attracting a record-breaking 18,000 participants including a strong Polish delegation. The event highlighted wind energy's vital role in Europe's energy transition, with wind already supplying 20% of the continent's electricity and on track to become the EU's leading power source before 2030. The EU has set ambitious targets for wind to cover 35% of electricity demand by 2030 and over 50% by 2050. Building more onshore and offshore wind energy is central to harvesting the energy benefits of the Baltic.



In this context, the industry unveiled the Copenhagen Call to Action, outlining three urgent policy priorities: full implementation of the revised EU permitting rules, removal of barriers to electrification, and de-risking of wind investments through a steady pipeline of two-sided Contracts for Difference (CfDs). These measures are key to advancing the EU's Clean Industrial Deal, accelerating electrification and

renewable deployment as pillars of Europe's energy security, industrial resilience, and climate leadership.

Poland's strong presence at the event demonstrated the country's accelerating momentum in offshore wind. With the right regulatory support, wind energy from the Baltic Sea can play a transformative role in strengthening Poland's energy security and boosting its economy through the creation of a modern, robust supply chain.

Thankfully, Poland is already taking action. The country has introduced a well-designed CfD scheme, is making steady progress on offshore wind development, aligning with the updated EU permitting framework, and is beginning to actively engage in regional cooperation across the Baltic. Polish transmission system operator PSE is also leading by example, working to streamline grid connection procedures and eliminate non-viable or "zombie" projects from the queue.

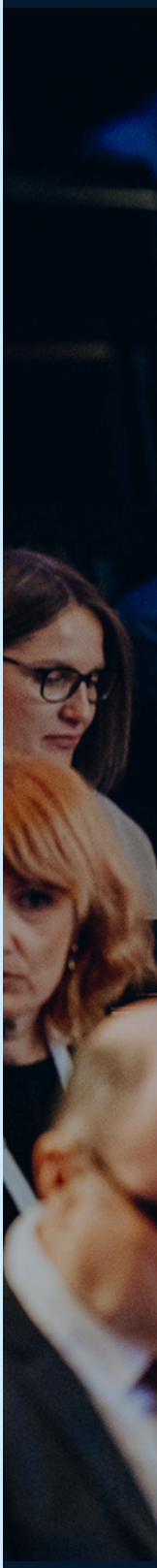
These developments reflect the three clear actions that governments across Europe can take today to place wind

energy at the core of the continent's industrial competitiveness. Poland is proving it can be a role model in moving in the right direction.

Poland's moment to lead

Developments in offshore wind, digitalization, electrification, and green hydrogen are all converging in the Baltic, and Poland is ideally place to benefit by coupling these sectors. With so many opportunities arriving at a time of such global instability can only be matured and benefitted from through cooperation. Cooperation in the Baltic Sea region as such to ensure reasonable energy prices requires an even more deliberate approach to driving new developments and projects at the regional level. With offshore wind maturing, and economic development in Northern Poland picking up speed, Poland is seeing the benefits of leadership in the next chapter of the history of the Baltic.

This is Poland's moment to lead the offshore transformation of the Baltic Sea and become offshore wind hub in region. With 18 GW offshore wind projects in pipeline and 33 GW of potential coupled with strong public-private partnerships, EU-aligned policy, and an adaptable industrial base, Poland is no longer a follower. Poland is becoming the anchor of the offshore wind future in Central and Eastern Europe and could be one of its main architects in the EU.



Authors:

Niels Frederik Malskær, Senior Energy Advisor at the Danish Embassy in Warsaw, and Natalia Zofia Ścięgosz, Commercial Advisor, Energy at the Danish Embassy in Warsaw.

Giles Dickson: Poland's offshore wind strategy - a potential game changer for Europe

OPINION

At the Baltic Sea Offshore Wind Energy Summit 2025 in Gdansk, **Giles Dickson, CEO of Wind Europe**, praised Poland's progress in offshore wind energy development. He stressed the need for a strategic approach to creating a robust domestic supply chain and Poland's potential to become a key European manufacturing hub for offshore wind energy components, subject to adequate investment and political support.

Dickson highlighted Poland's significant progress in offshore wind energy, including the start of construction of the first offshore wind farm and progress towards the ambitious targets of "6 GW offshore wind by 2030, 18 GW by 2040". He also praised the development of the Polish offshore wind supply chain. **He stated**: "This is indeed the best strategy we have seen for the development of offshore wind capacity across Europe. This strategy requires a total investment of '€5 billion', with the potential to create jobs and attract additional investment to northern Poland." He urged the Polish government to consider supporting this plan through public financial support, pointing to the flexibility of the European Union in offering state aid for such industrial investments.

Dickson also addressed the challenges of the European Commission's suggested changes to the state aid guidelines, in particular the 75% on-site manufacturing rule. He explained that this rule, mandating factories electrifying their processes

to source 75% of their electricity from on-site generation facilities, would make power purchase agreements (PPAs) with large wind farms more difficult, thus hindering industrial electrification. Dickson urged the Polish government and other EU member states to advocate for the removal of this rule during the consultation with the European Commission. **Dickson argued**: "Please tell the Commission that this 75% rule must disappear. It is a barrier to power purchase agreements. It is a barrier to the electrification of industry".

Dickson stressed the importance of strengthening European clean technology supply chains and supporting energy-intensive industries in their electrification and decarbonisation efforts. He referred to the European Investment Bank's new guarantee facility to reduce the risk for wind farm operators entering into PPAs with industrial customers.

In conclusion, Dickson stressed that Poland plays a key role in Europe's energy transition through the development of the offshore wind sector and the building of a competitive supply chain. He called for continued cooperation, strategic investment and conducive policies to fully realise the potential of offshore wind energy in Poland and the entire Baltic Sea region.

Jerzy Buzek: Europe's security is offshore wind energy

OPINION

During the Baltic Offshore Wind Energy 2025 Summit in Gdansk, **Former Prime Minister and President of the European Parliament Jerzy Buzek** stressed the key role of energy transition for Europe's security. He drew attention to the need to become independent from Russian fossil fuels and called for the development of offshore wind energy in the Baltic Sea.

During his speech, Jerzy Buzek stressed that Poland and the entire Baltic Sea region have a key role to play in Europe's energy transition. He pointed out that the relocation of energy-powered industry to Pomerania and Western Pomerania is a huge change, comparable to the historic events that took place in Gdansk and Szczecin in 1980. He made direct reference to the efforts to build a central industrial district and how the current changes represent a radical shift, the significance of which is often underestimated.

Buzek drew attention to the need to become independent from the supply of fossil fuels from Russia, arguing that buying them meant funding a criminal. In this context, **he stressed that the development of wind energy in the Baltic Sea is not only an economic issue**, but above all a safety issue. 'We cannot pretend here when talking about energy, when talking about key things, that there are no problems, because there are serious problems and we have to respond to them.'

This answer, according to Buzek, should include a fair energy transition, including the development of wind energy in the Baltic Sea, especially given the current geopolitical context. He stressed the need not to fund those who wage war on free nations for their fossil fuel supplies.

The speaker also called for increased investment in critical infrastructure, including offshore wind energy services. 'We are absolutely prepared today for Poland to also participate in the construction in our shipyards, especially in the Gdynia shipyard, of the vessels that will constitute this service fleet'.

He stressed that Poland should aim to produce all elements of the wind energy supply chain in the European Union to avoid dependence on external production. Buzek specifically mentioned Poland's preparations to build the necessary service vessels in its shipyards, especially in Gdynia. He also stressed the need to protect critical energy infrastructure, including offshore wind energy solutions and service fleets.

Buzek pointed out that the energy transition is essential to building a strong and united Europe that will partner with the United States in many endeavours. 'To talk about a European defence union without a real, functioning Energy Union is simply impossible,' he said. He pointed to the need for industry to switch to electricity and to increase efforts to protect critical energy infrastructure. He also noted the importance of ensuring competitive energy prices in Europe compared to those in China and the US to support European industry. He noted that a resilient and competitive economy is essential to support military spending and infrastructure development.

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10th of March 2025
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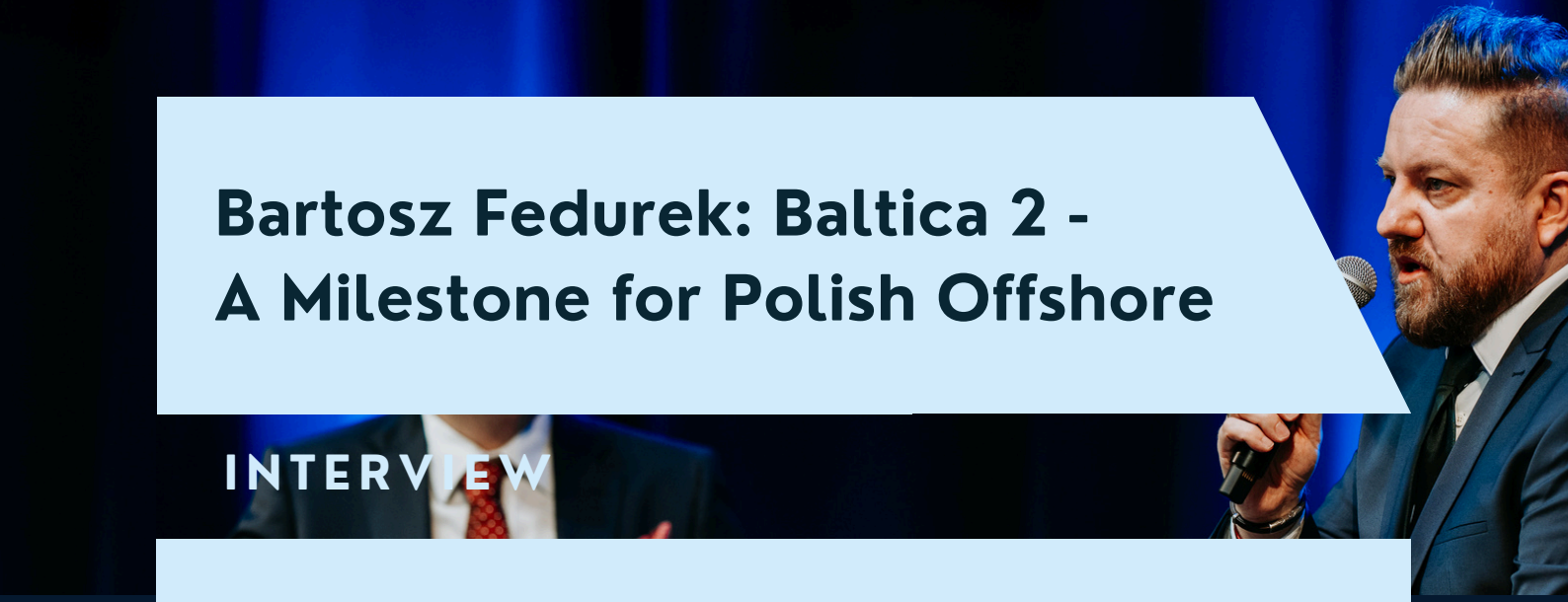


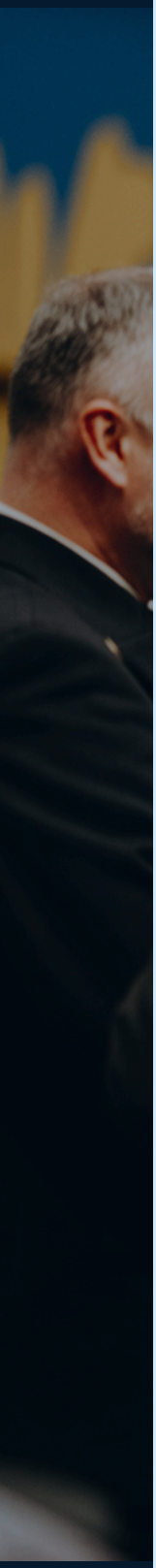
Bartosz Fedurek: Baltica 2 - A Milestone for Polish Offshore

INTERVIEW

This interview with Bartosz Fedurek CEO of PGE Baltica explores the current state and future prospects of offshore wind development in Poland. While Poland is for obvious reasons still behind more established markets like the UK, it has made considerable progress, recently reaching a final investment decision on the Baltica 2 project. Fedurek highlights regulatory frameworks, supply chain development, and macroeconomic pressures impacting global offshore wind industry as key factors influencing the industry's maturity. Security concerns and defence coordination are also significant challenges, requiring ongoing dialogue with authorities. Looking ahead, PGE Baltica is focused on advancing the Baltica 3 project and participating in upcoming CfD auction, with optimism but also aware of the challenges, especially in ensuring cost competitiveness of new projects. The discussion emphasizes importance of regional cooperation and a positive narrative to drive further growth in the offshore wind sector which still needs care from policymakers.

Krzysztof Bulski: To begin, could you assess the maturity of the Polish offshore wind sector from PGE Baltica's perspective, especially compared to other Baltic Sea countries? What stage of development is Poland currently in?

Bartosz Fedurek: Compared to more developed offshore wind markets like the UK, Poland is still in its early stage, like



a teenager still prone to "childhood diseases". Poland does not yet have operational offshore wind assets, although two projects are officially under construction. It's worth noting we've made a significant progress. PGE obtained its first offshore location license around 2012. Just two months ago, in January, together with our great JV partner – Ørsted, we made the final investment decision on Baltica 2, our most mature project. It's the largest offshore wind project in the Baltic Sea and one of the largest globally. This final investment decision came 12 years after receiving the OLL, marking a long journey. Another key milestone was in 2016 when we initiated the first environmental surveys offshore. A lot of capital and staff dedication have been patiently invested. Our colleagues at Baltic Power are already installing monopiles. We plan to begin our first offshore operations – namely, boulders clearance campaign – this year.

Krzysztof Bulski: So exactly what is the plan for the next steps? But perhaps if you could draw a shorter time frame than the next 12 years, maybe the next 2 or 3 years, what can we expect?

Bartosz Fedurek: Before I answer this question, please, let me shortly conclude on the topic of maturity of the sector. Let's look at regulatory environment. We have a strong foundation with a Contracts for Difference (CfD) scheme based on the British model. However, some regulatory aspects are still "work in progress", such as defence and security or coexistence with fishermen. Another important aspect is local supply chain. It's important not to judge the local content based on very first projects in their current maturity level. Local content should be perceived by the entire project's life cycle and the whole Polish offshore wind program that is foreseen to reach up to 18 GW by 2040. Predictability of the industry in the long term and the

volume of investment is key to the development of the strong local supply chain. And the upcoming auction in 2025 will be a crucial moment for the industry. This will be the first competitive CfD auction for offshore wind in Poland. There have been challenging discussions regarding the ceiling price for this auction, because industry is experiencing significant macroeconomic pressure worldwide. For example, during the contracting phase of Baltica 3, we saw cost increases of 30% to even 50%, compared to our 2021 CfD application. Despite these headwinds, we remain optimistic. In the coming months and years, construction of Baltica 2 will continue. Onshore infrastructure is also underway, with the construction of an onshore substation in Choczewo, along with the construction of an onshore base in Ustka starting this spring. We should reach COD in 2027. So keep your fingers crossed please.

Krzysztof Bulski: But one more threat. That's threat challenge that we already mentioned at the beginning. Could you elaborate on the practical implications of the current security situation for offshore wind farms? Is security the primary challenge in the foreseeable future, or are there other significant concerns in the first and second phases of development?

Bartosz Fedurek: Defence and security is a broad topic, and Tomasz Urbaniak, Head of Defence & Security at PGE Baltica,

will discuss it in detail during a dedicated panel later today. Key considerations include aligning with the Ministry of Defence on installing equipment to mitigate any negative impacts of farm's infrastructure on national defence systems. Other questions to be answered include who should bear the costs, and who should operate and be responsible for the defence equipment on-site.

Krzysztof Bulski: May jump in here. I should note that we may not fully answer these questions today, as some answers will be provided by Tomasz Urbaniak during the security panel. These issues are complex, particularly regarding who bears the costs, as it depends on multiple factors and actors.

Bartosz Fedurek: These are complex issues. Maintaining a close and positive dialogue with authorities, including the Ministry of Defence, is crucial and we are doing this. We are focused on optimizing the placement of additional equipment and sensors to avoid interference, which can reduce the quality of the information gathered. Optimization should include all new wind farm developments. Currently, each installation is treated separately, so there is room for improvement. It's worth mentioning that when we began assessing conditions for offshore wind farm construction in Poland in 2020, the geopolitical environment was very different. The current security concerns were not as prominent. Consequently, many of the associated costs, affecting both CAPEX and OPEX, were not factored into the maximum CfD price calculation. Hence, the new defence and security realities impact the economics of our projects.

Krzysztof Bulski: Could you provide more insight into PGE Baltica's plans for the second phase? Also, considering recent challenges in Lithuania and Denmark, what are the possible

scenarios for this year's auction in Poland?

Bartosz Fedurek: Securing Baltica 2 was a major achievement. However, the next day we immediately resumed working to secure our future pipeline. PGE Baltica, a modern organization with over 170 highly skilled professionals, is eager and ready to deliver more. We have Baltica 3 in our portfolio, which was developed alongside Baltica 2 but was paused and reconfigured due to beforementioned CAPEX increases. We are committed to accelerating Baltica 3. Additionally, we are focused on developing a strategy for this year's auction and preparing Baltica 1, a project developed by us from scratch. We hope to receive the environmental permit by the end of this year, enabling us to participate in the auction.

Krzysztof Bulski: So it looks rather optimistic. And I think we can say that there is a big chance that this will be a good year.

Bartosz Fedurek: Yes, that is our expectation. While the future appears promising, it requires additional effort from investors and authorities. We must remember that the offshore wind sector is still developing and still requires care from policymakers and close cooperation among investors and suppliers. All of us need to work hard to maintain a positive narrative about benefits of offshore wind and improve the cost-effectiveness of this technology compared to alternatives. We must work together regionally, leveraging the synergies within the region to ensure success.

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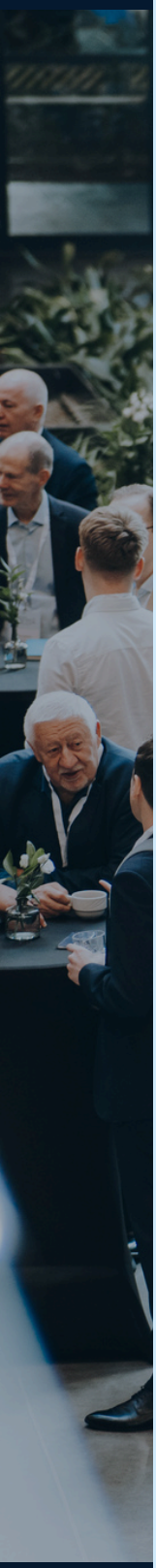
Ocean Winds highlights the crucial role of ports in offshore wind development

COMPANYS' VOICE

During the Baltic Sea Offshore Wind Energy Summit 2025 in Gdansk, a panel discussion titled "Ports of Power: Enabling Offshore Installation and Maintenance" underscored the vital role of port infrastructure in the burgeoning offshore wind sector. **Marek Świerżyński, Engineering Associate Director at Ocean Winds**, contributed significantly to the debate, emphasizing the necessity of port development and collaboration for the industry's growth.

The Baltic Sea Offshore Wind Energy Summit 2025, held at the European Solidarity Centre in Gdansk, served as a crucial platform for industry leaders, policymakers, and experts to discuss the future of offshore wind energy in the Baltic Sea region and accelerate the green transition. Ocean Winds POLSKA participated as a partner, actively supporting discussions on key challenges and solutions for the offshore sector's development.

The "Ports of Power" session specifically addressed the essential infrastructure required for the installation, operation, and maintenance of offshore wind farms. Marek Świerżyński, representing Ocean Winds, shared valuable insights during the panel. He emphasized that ports are not merely infrastructure but a fundamental element for the development of offshore wind energy, requiring long-term investments and continuous support for infrastructure development. **He stated:** "Baltic region is an emerging region, and Gdańsk and other ports



in the Baltic region are basically the emerging players right now, which is very positive. Drawing on his company's experience, Świerżyński pointed out that Ocean Winds is actively developing projects in Poland, having selected a service port in Władysławowo. He noted the positive attributes of this port, including good conditions, proximity to their site, and sound infrastructure with access roads and a rail station. He anticipates the construction phase to commence in 2026, with the port becoming operational in 2028. Furthermore, he mentioned that the process of selecting ports for foundations and wind turbines is in its final stage, involving thorough checks of technical, commercial, and legal parameters.

Świerżyński acknowledged the Baltic Sea region as an emerging player in the offshore wind sector, with ports like Gdansk playing an increasingly positive role. He suggested that Baltic ports should learn from the history and experience of more established ports in the North Sea, particularly regarding infrastructure parameters, operational efficiency, safety practices, permitting processes, and regulations. **He elaborated on this by saying**: "The Baltic region and its ports, during infrastructure upgrades, shall take the insights and lessons learned from other ports in the North Sea, because these ports have already supported offshore wind farms, and they have the experience and knowledge. However, he also stressed the importance of considering current market trends when planning investments and upgrades to handle large components such as towers, nacelles, blades, and monopiles, ensuring they align with project needs.

Looking ahead, Świerżyński expressed his belief that the Baltic region's port infrastructure will be ready within two

years to support the ambitious targets for offshore wind in the region. He envisions Baltic ports playing a crucial role in project execution and operations, contributing to a sustainable and resilient future. A key takeaway from Świerżyński's contribution, as highlighted by the summit organizers, was the understanding that the Baltic region needs to accelerate the modernization of its ports to meet the growing demands of the offshore sector, drawing inspiration from the North Sea's experiences while adapting solutions to local conditions. He also noted the potential key role of smaller ports, such as Władysławowo, the service base for Ocean Winds' BC-Wind offshore farm, in supporting offshore operations, long-term industry growth, and the region's energy security. Świerżyński emphasized that collaboration between developers, port authorities, and policymakers is essential to streamline logistics, enhance efficiency, and ensure investment.

CRIST S.A. emphasizes geopolitical risks and a strong european offshore wind supply chain

COMPANYS' VOICE

Daniel Ozon, Advisor to the Management Board of CRIST S.A., highlighted the critical need for a resilient European supply chain for offshore wind. He emphasized the geopolitical risks associated with relying heavily on potentially distant suppliers, particularly in China, and called for greater support for European manufacturers.

Ozon pointed out CRIST S.A.'s extensive experience in building installation vessels for the European offshore wind sector, stating, "maybe not many people know we have a huge track record in building installation vessels. In the past we have delivered more than four checkup vessels for the European offshore wind. Some of them are still building European offshore wind". He then expressed concerns about the shift of industrial capacity to China and the impact of Chinese subsidy schemes on fair competition.

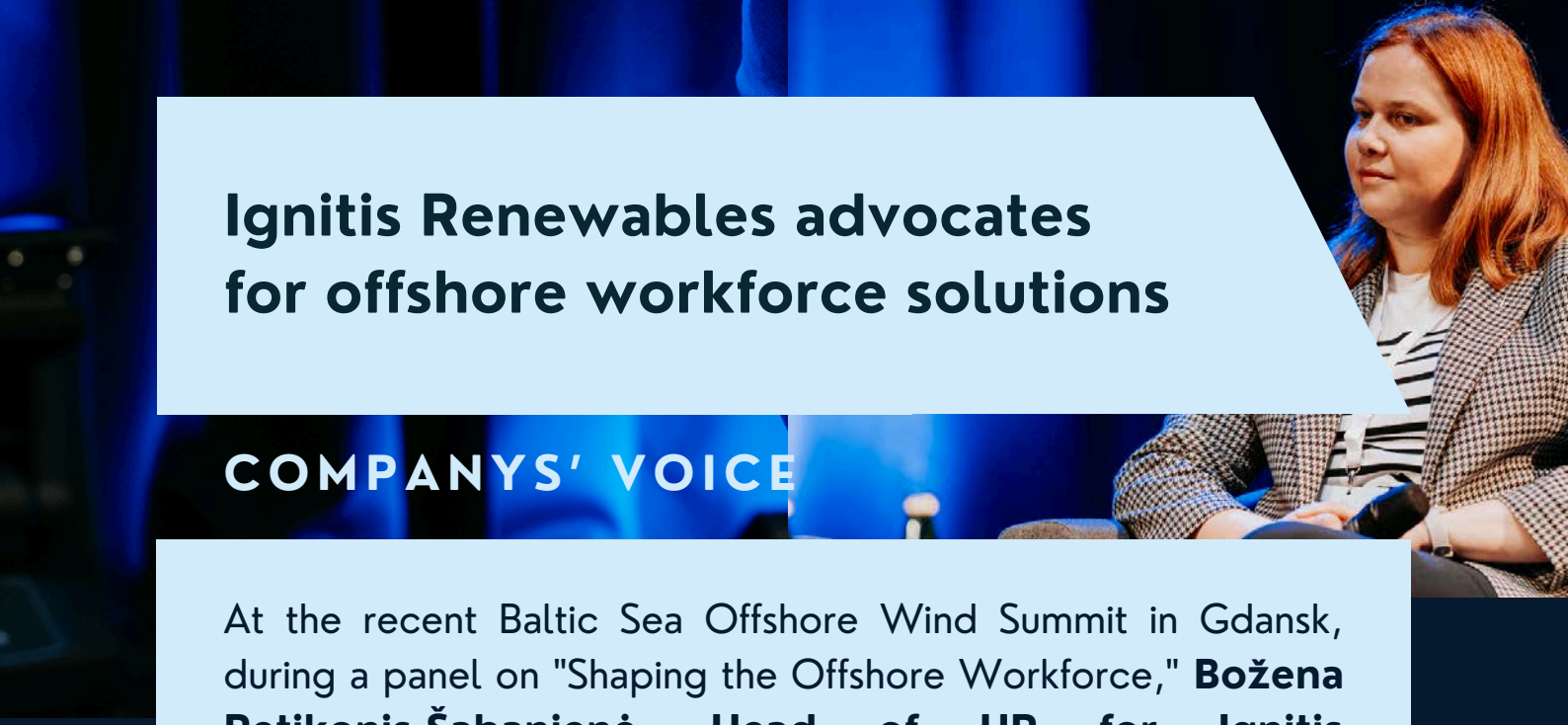
A key concern raised was the geopolitical risk of relying on a Chinese supply chain for vessels needed to achieve Europe's offshore wind targets. Ozon noted the lengthy four-year construction time for these vessels and questioned the security of this supply in the event of international tensions. **He asked:** "What happens if there are some tensions in Asia? How are we going to get the Jacob vessels delivered to Europe?"

Ozon advocated for a resilient European supply chain, similar

to Denmark's approach of fostering partnerships across European nations. He also pointed to the growing size of wind turbines and the increasing demand for specialized vessels, indicating a potential shortage if Europe does not bolster its shipbuilding capabilities.

Ozon also touched upon the financial limitations faced by growing Polish companies seeking to expand their capacity to meet the demands of the offshore wind sector. He acknowledged the positive cooperation with Polish banks and the Polish export agency but pointed out the constraints. of company balance sheets when trying to secure necessary financial instruments like performance bonds. He suggested the need for external support mechanisms to accelerate the growth of the Polish supply chain regionally and globally.

In conclusion, Daniel Ozon's address underscored the critical intersection of industrial policy, geopolitical stability, and financial support in building a robust and secure European supply chain for the burgeoning offshore wind industry in the Baltic Sea and beyond. His remarks served as a strong call for strategic investment and collaboration to ensure the timely and secure realization of Europe's ambitious renewable energy targets.



Ignitis Renewables advocates for offshore workforce solutions

COMPANYS' VOICE

At the recent Baltic Sea Offshore Wind Summit in Gdansk, during a panel on "Shaping the Offshore Workforce," **Božena Petikonis-Šabanienė, Head of HR for Ignitis Renewables**, stressed the vital role of collaboration and an open approach to international talent in overcoming the growing skills gap in the offshore wind sector. The panel discussed strategies for attracting talent and building a strong workforce to support the expanding industry in the Baltic Sea region.

Petikonis-Šabanienė, representing a leading renewable energy developer operating across three Baltic states and Poland, emphasized the interconnectedness of the region's talent pool. While companies often have their own recruitment programs, she suggested that greater benefits could be achieved if the entire offshore wind value chain worked together. "The real potential lies in all industry players joining forces, not just developers, but everyone across the value chain," **she stated**.

A key challenge identified was the complexity of the offshore wind industry, which demands a diverse range of skills, including engineering, technical, environmental, legal, and supply chain expertise. She highlighted the high demand for specific roles, such as supply chain specialists, across all countries where Ignitis Renewables operates.

Advocating for a broader approach to talent acquisition, Petikonis-Šabanienė highlighted the need to look beyond national borders. "It's crucial to be open to international talent. The offshore industry has been operating in other countries for a long time, so being open to learning is essential for gaining competence," **she asserted**. She also shared Ignitis Renewables' success in attracting Lithuanian professionals working abroad back to Lithuania for offshore wind projects, demonstrating the potential of leveraging diaspora talent.

Petikonis-Šabanienė acknowledged the efforts of organizations like Wind Europe in developing career pathways for the sector and proposed that these frameworks should be adapted to the specific context of the Baltic states and Poland, considering workforce mobility. She noted a shift towards accepting the fluidity of the offshore wind talent pool, with professionals moving between projects across different countries.

Ignitis Renewables is actively investing in the future workforce through initiatives like scholarships to encourage young people to pursue engineering and join the energy sector. However, Petikonis-Šabanienė reiterated the importance of a collaborative, industry-wide strategy to effectively address the workforce challenges in the growing offshore wind sector.

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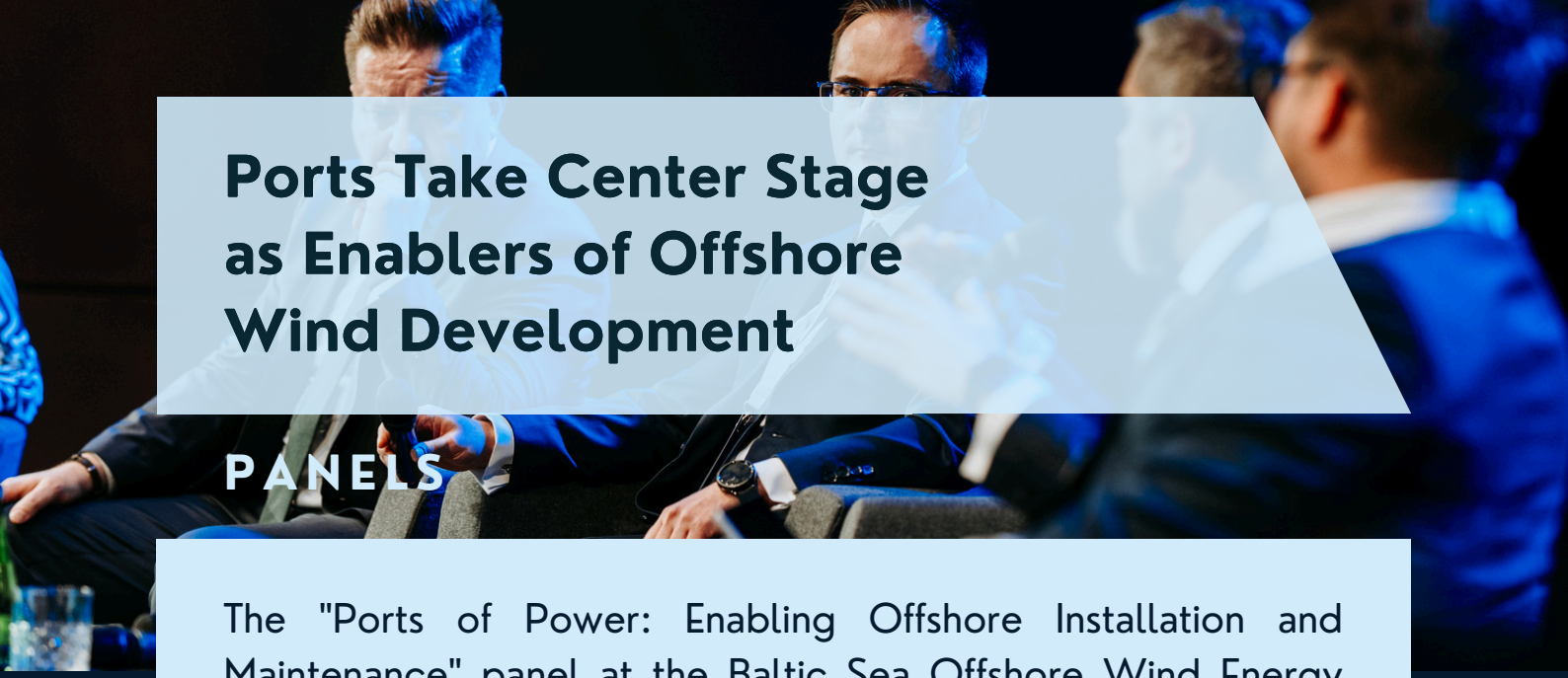


Ports Take Center Stage as Enablers of Offshore Wind Development

PANELS

The "Ports of Power: Enabling Offshore Installation and Maintenance" panel at the Baltic Sea Offshore Wind Energy Summit 2025 in Gdansk underscored the indispensable role of port infrastructure in realizing the ambitious goals for offshore wind energy in the Baltic Sea region. The discussion, moderated by Zuzanna Nowak, Analysis Director at the Opportunity Institute for Foreign Affairs and Energy Expert at the I. Łukasiewicz Institute for Energy Policy, brought together industry leaders to examine the current state of port development, the challenges and opportunities for collaboration, and the strategies needed to meet the growing demands of the rapidly expanding offshore wind sector.

The panel featured Bartosz Fedurek, CEO of PGE Baltica; Lars Thomsson, Coordinator Energy Island Gotland; Stefan Rudnik, Investment Department Director, Port of Gdansk Authority; Jeppe la Cour, Chief Commercial Officer, Port of Roenne; and Marek Świerżyński, Engineering Associate Director, Ocean Winds. Their insights highlighted the critical need for strategic planning, investment, and cooperation to ensure that port infrastructure can effectively support the installation, operation, and maintenance of offshore wind farms.

Bartosz Fedurek: Progress in Polish Port Infrastructure

Bartosz Fedurek provided an overview of PGE Baltica's experience with port infrastructure development in Poland.

He highlighted the distinction between installation ports and O&M ports, expressing satisfaction with the progress of the T5 installation hub in the Port of Gdansk. "We are happy to benefit from T5 in a way that the entire offshore wind turbine installation campaign, meaning 107, 14-megawatt Siemens turbines, will be installed from Gdańsk T5 hub."

Fedurek also noted the selection of Doraco for the construction of their O&M base in Ustka, emphasizing the commitment to local content. He concluded that they are currently "on track" regarding port infrastructure for their projects.

Marek Świerżyński: Learning from the North Sea and Adapting to Local Needs

Marek Świerżyński, representing Ocean Winds, emphasized that ports are "not merely infrastructure but a fundamental element for the development of offshore wind energy, requiring long-term investments and continuous support for infrastructure development". He shared the progress of their BC-Wind project, including the selection of a service port in Władysławowo and the final stages of selecting installation ports. **Świerżyński advocated for Baltic ports to** "take the insights and lessons learned from other ports in the North Sea, because these ports have already supported offshore wind farms, and they have the experience and knowledge", while also stressing the importance of adapting to local conditions and market trends, particularly regarding the increasing size of components. He expressed optimism that Baltic port infrastructure would be ready within two years to support ambitious offshore wind targets.

Lars Thomsson: The Impact of Policy Uncertainty on Port Development in Sweden

Lars Thomsson highlighted the significant setback for offshore wind development and consequently port planning in Sweden due to a recent government decision to halt offshore wind park development in the Baltic Sea. "So, um, right now that's the main issue for us to have the set the plan to go for offshore in total in the Baltic Sea on the Swedish side. Uh, and then we'll deal with the port". Despite this challenge, Thomsson stressed the long-term perspective needed for port development, typically an 8-10 year timeframe. He emphasized the need for a reliable master plan and long-term agreements with major customers once the policy landscape becomes more favorable. He expressed optimism for the future, stating, "I'm very optimistic in 10 years of time because we have no other option that this offshore uh if we fix the this transmission uh the green transmission".

Stefan Rudnik: Transforming Gdansk into an Energy Hub

Stefan Rudnik detailed the Port of Gdansk Authority's vision of becoming an "energetic hub in a multi-dimensional way", balancing traditional cargo with the emerging needs of the renewable energy sector. He highlighted the redevelopment of a container terminal area into the T5 installation terminal, made possible by EU funding. "So we sat to the table and thought well maybe that and it it happened but we all have to be aware that it wouldn't have happened if it wasn't for the funds from the EU from uh the national reconstruction plan that were unblocked only in July last year". Rudnik emphasized their master plan for future development, including the inner port for universal cargo handling and the outer port for

specialized terminals. He also pointed to their efforts in seeking funding for green initiatives like onshore power supply for vessels. Looking ahead, he envisions a strong synergy within the Gdansk region, with local manufacturers supplying the T5 terminal.

Jeppe la Cour: The Need for Cooperation and Addressing Uncertainty

Jeppe la Cour commended Poland's proactive approach to port development, suggesting it's a path other Baltic nations should follow. He highlighted the significant upfront investment (CAPEX) and lower operating costs (OPEX) associated with port infrastructure. **La Cour cautioned against the negative impact of uncertainty**, referencing cancelled Swedish projects and redone Danish tenders. "One thing that is very poisonous if you want to build something longlasting is uncertainty. It was said earlier that Swedish parks that were cancelled or the tenders for Denmark that had to be redone for the Baltic region - that is something that creates uncertainty in the industry and that is not good when you have a heavy initial investment". He stressed the importance of greater cooperation between ports in the Baltic Sea region due to the clustered nature of offshore wind farm development and anticipated larger components and more specialized ports in the future.

Key Takeaways:

Ports as Essential Infrastructure: The panel firmly established ports as more than just transit points; they are fundamental enablers of the entire offshore wind lifecycle.

Significant Progress in Poland: Poland is making

substantial strides in developing port infrastructure to support its offshore wind ambitions, particularly in Gdansk and Ustka.

Policy Certainty is Crucial: Uncertainty in government policies, as highlighted by the Swedish experience, can severely hinder port development and investment.

Importance of Learning and Adaptation: Baltic ports should learn from the experience of established North Sea ports while adapting solutions to the specific conditions and evolving demands of the Baltic Sea.

The Need for Collaboration: Effective logistics and regional growth necessitate strong cooperation between ports, developers, and policymakers.

Long-Term Vision and Investment: Port development requires long-term planning and significant financial investment, often with a broader economic and energy transition perspective rather than solely direct returns from offshore wind projects.

Anticipating Future Needs: Ports must plan for increasingly larger wind turbine components and the potential for more specialized port functions.

EU Funding as a Catalyst: European Union funds play a vital role in enabling critical port infrastructure projects.

The panel concluded with a hopeful outlook for the future, envisioning a well-developed network of Baltic Sea ports capable of supporting the region's ambitious offshore wind energy targets, provided that strategic planning, consistent support, and robust collaboration continue.

Industry Leaders Grapple with Supply Chain Challenges and Opportunities

PANELS

The Baltic Sea Offshore Wind Summit recently convened in Gdansk, bringing together key stakeholders to address the pivotal issue of supply chain development for the burgeoning offshore wind sector in the region. A central panel discussion, featuring representatives from developers, manufacturers, financing institutions, and industry associations, highlighted both the significant progress made and the considerable hurdles that remain in establishing a robust and resilient supply chain.

The discussion, moderated by Krzysztof Bulski of BalticWind.EU, kicked off with **Cat Brown, Deputy Project Director at Baltic Power**, who emphasized the critical importance of early engagement with the market to build an effective supply chain. Drawing on Baltic Power's five-year experience, **Brown stated:** "It's starting to get involved with the market early". She underscored the proactive approach taken by Baltic Power to encourage local content, even amidst the challenges of the pandemic and geopolitical instability. While acknowledging Poland's existing industrial base, Brown stressed the need for continued investment and dedication from both the Polish market and the broader offshore wind industry to fully realize the potential of the local supply chain.

Daniel Ozon, Advisor to the Management Board of CRIST S.A., a European shipbuilder, offered a unique

perspective from within the supply chain itself. **He highlighted CRIST's track record in building installation vessels** for the offshore wind sector but voiced concerns about the growing reliance on the Chinese supply chain, particularly for specialized vessels, citing geopolitical risks. "So you may imagine we are putting uh the European offshore wind at risk in a sense that uh 300 gawatt to be built a very very much dependent on the Chinese supply chain if you believe or not but these vessels are being built for four years. It takes four years from the starting point to the completion to the delivery". **Ozon advocated for greater support for European manufacturers**, especially in Poland, to create a more resilient regional supply chain. He also touched upon the financial limitations that can restrict the growth of local businesses aiming to scale up and compete globally.

Victoria Toft, Head of Supply Chain at Aegir Insights, provided a global overview of the supply chain landscape. While acknowledging the bottlenecks in vessel availability worldwide, she offered an optimistic view of Poland's progress in building its offshore wind supply chain, noting the impressive development of component factories despite the market being in its early stages. Toft emphasized the importance of executing on the current project pipeline across the Baltics to provide a consistent demand signal that would further enable supply chain growth in an efficient manner. She suggested that a smoother execution pipeline, with projects following each other, would reduce risks and avoid cannibalization within the supply chain.

Janusz Gajowiecki, President of the Polish Wind Energy Association, focused on the economic benefits of a strong European supply chain. He argued that a resilient

European supply chain, rather than solely a local one, would guarantee lower long-term costs. Gajowiecki highlighted the Polish wind industry's proactive efforts to strengthen the supply chain, including the establishment of the Wind Industry Hub and a comprehensive analysis identifying opportunities for Polish manufacturers. He expressed optimism that with the right strategic direction and government support, Poland could become a significant player in the European offshore wind supply chain. He stated that a document outlining a strategy for strengthening the Polish supply chain has been prepared for the Prime Minister's approval, signifying a crucial step forward.

Paweł Lewandowski, Senior Loan Officer at the European Investment Bank (EIB), offered the perspective of a financing institution. He acknowledged the current challenging economic environment with high inflation impacting supply chain costs and potentially affecting project valuations. Lewandowski emphasized that while the EIB cannot directly influence inflation or energy prices, it can play a role in improving the supply chain's availability, which would positively impact project economics. He noted the increased risk developers face as supply chain manufacturers seek to shift liabilities and price risks. Regarding the preference for European suppliers, Lewandowski clarified that the EIB's primary concern is verifying the contractor's track record, experience, and creditworthiness and ensuring a fair EU procurement process, rather than prioritizing local companies solely based on their location.

Jānis Ločmelis, Head of ELWIND Project Division, Investment and Development Agency of Latvia, highlighted the potential for cross-border collaboration within the Baltic Sea region to build a comprehensive supply chain. He noted that while

Poland has made significant strides, other Baltic states like Latvia are also actively developing their port infrastructure and seeking to attract investors to serve future offshore wind projects. Ločmelis emphasized the importance of utilizing the competitive advantages of each country within the region and leveraging EU funding to support infrastructure development.

The discussion also touched upon the crucial role of ports in offshore wind development, a theme echoed in a separate context by **Marek Świerżyński, Engineering Associate Director at Ocean Winds**. Świerżyński, while not part of this specific panel but a key participant at the summit, emphasized that ports are fundamental for the industry's growth, requiring long-term investments. He pointed to Ocean Winds' experience in Poland, selecting a service port in Władysławowo and progressing with port selection for foundations and turbines. Świerżyński stressed the need for Baltic ports to learn from the experience of established North Sea ports while adapting to local conditions and current market trends to handle increasingly large components. He expressed optimism that the Baltic region's port infrastructure would be ready within two years to support ambitious offshore wind targets.

A recurring theme throughout the panel discussion was the time horizon associated with offshore wind projects and the development of the necessary infrastructure. **Victoria Toft noted** that building large factory investments can take at least five years. Kat Brown highlighted the challenges of long-term assumptions, especially with the rapid technological advancements in turbine size, and the need for a degree of standardization to benefit the supply chain.

In conclusion, the Baltic Sea Offshore Wind Summit panel underscored the complex interplay of factors involved in building a successful offshore wind supply chain in the region. While Poland is emerging as a key player with significant industrial capacity and ambitious plans, collaboration across the Baltic Sea, strategic investments, supportive financial mechanisms, and a clear vision for long-term development are all crucial for realizing the full potential of offshore wind energy in the area and contributing to Europe's broader energy transition goals. The need for a resilient European supply chain, capable of mitigating geopolitical risks and fostering economic growth, remains a central priority for the industry.

Security Takes Center Stage Amid Geopolitical Tensions

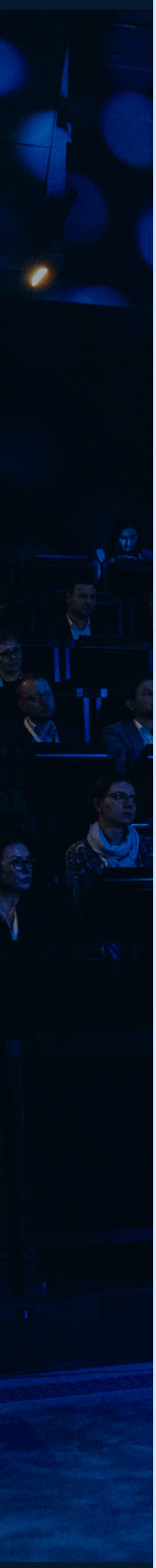
PANELS

A palpable sense of urgency permeated the "Guardians of the Wind" panel at the Baltic Sea Offshore Wind Summit. in Gdansk, as security experts and industry leaders convened to address the mounting threats to offshore wind infrastructure in the strategically significant Baltic Sea region. The discussion, framed against a backdrop of geopolitical instability, focused on the necessity of robust security measures, enhanced cooperation between stakeholders, and the specific challenges posed by both physical and cyber threats.

Moderated by Roland Freudenstein, Brussels Office Director of the Free Russia Foundation, the panel brought together Airidas Daukšas, Vice Minister of Energy of the Republic of Lithuania; Tomasz Urbaniak, Head of Defence & Security, PGE Baltica; Janusz Gajowiecki, President of the Board, Polish Wind Energy Association; Capt. (N) Rafał Miętkiewicz, DSc, Assoc. Prof., Polish Naval Academy; and Niels Malskær, Energy Attaché at the Royal Danish Embassy to Poland. The conversation underscored the critical intersection of energy security and national defense in the context of rapidly expanding offshore wind capacity.

Airidas Daukšas: Russia Identified as Primary Threat

Airidas Daukšas set a stark tone by unequivocally identifying Russia as the main danger in the Baltic Sea region, particularly



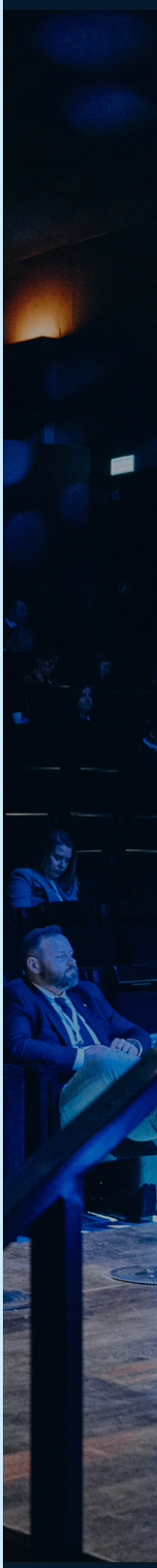
in light of recent critical infrastructure damage. "The main danger is Russia with their activities in our region – in our Baltic Sea region. As we see the latest damages to our critical infrastructure shows that we have to be ready to react and of course to prepare for possible damages in the future". **He emphasized the need for a collective European response**, including the deployment of drone and monitoring systems, as well as ensuring armed forces presence in the sea. Daukšas also highlighted the importance of financial mechanisms at the EU level to support these security measures.

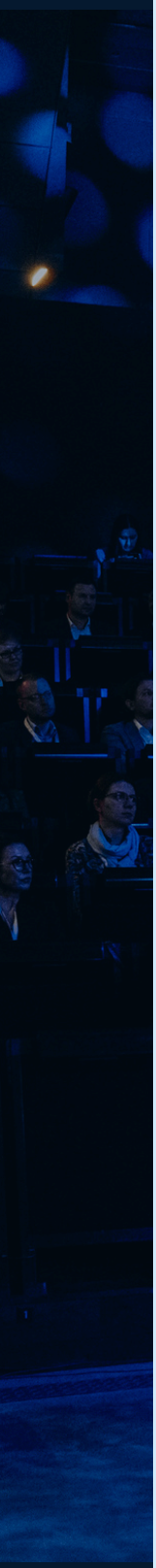
Tomasz Urbaniak: Beyond Physical Threats to Holistic Security

Tomasz Urbaniak echoed the long-standing perception of Russia as a threat from a Polish perspective, noting that the "shadow fleet" was not a surprise for Polish entities. However, he broadened the scope of security concerns beyond purely physical threats. "But let's not forget that we shouldn't focus on the concept of security as only and exclusively security versus physical threat. Developers must ensure both this ordinary security, I would call it occupational safety and health (OSH), that is the security of farm operation. It must be security related to environmental protection. This has already been mentioned today. However, it is also the security of local communities."

Urbaniak stressed the importance of dialogue and cooperation across various sectors, including local content providers, and appealed for administrative support to enable the offshore wind business to thrive while ensuring security. He also pointed out that cyber threats are not exclusive to Russia.

Janusz Gajowiecki: Countering Russian Information Manipulation

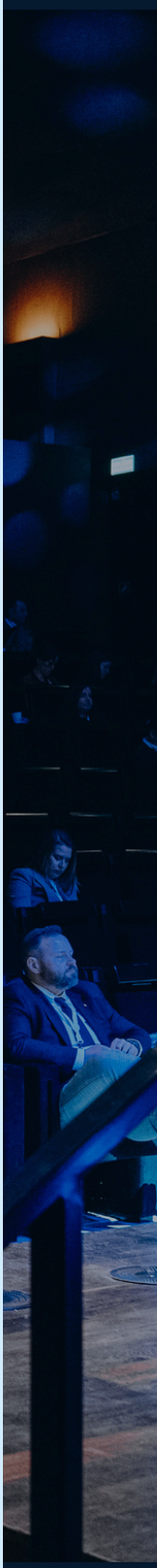


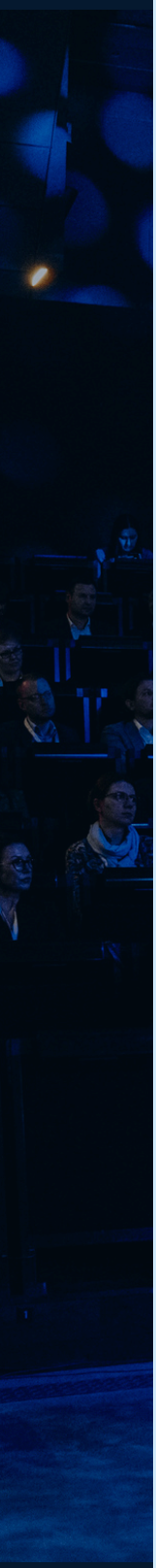


Janusz Gajowiecki highlighted the intense information manipulation emanating from Russia aimed at undermining the development of wind energy in Europe. "As I mentioned at the beginning of the summit, we are under the huge attack of the manipulation from the Russia side. They are very much aware that they have to do everything to stop the wind energy in Europe". **He detailed** the spread of misinformation regarding the economics and feasibility of wind power and noted the increasing strength of these disinformation campaigns. Gajowiecki stressed the need for collaboration across the Baltic states to counter these narratives and the importance of involving civil society alongside government efforts. He highlighted the necessity for wind energy associations to now allocate resources to combat disinformation.

Capt. (N) Rafał Miętkiewicz: The Role of Naval Power and Emerging Technologies

Captain Rafał Miętkiewicz addressed the challenges of providing maritime security for vast offshore wind farm areas. Acknowledging the limitations of continuous naval surveillance over Poland's extensive maritime zones, he advocated for the integration of emerging technologies such as artificial intelligence and autonomous systems to enhance monitoring and threat detection. "From my perspective a strong supporter ofic technologies and that's why some elements of artificial intelligence, machine learning, game theories should be involved to reach this kind of tools to search for some unexpected behaviors of the ships and others that are present on try to catch them before the attack attempt". Miętkiewicz emphasized the essential presence of naval forces at sea as a deterrent and highlighted the potential of dual-use technologies to reduce costs for both security and commercial operations.



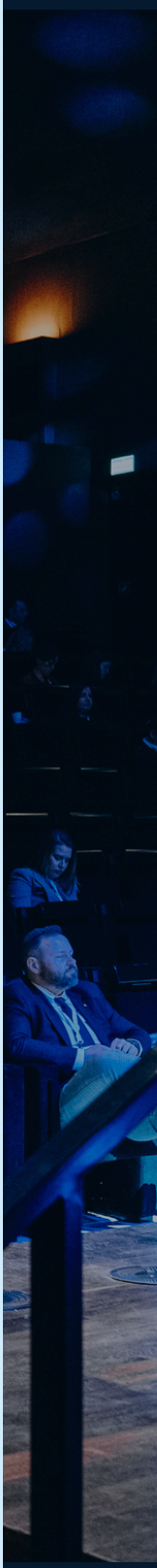


Niels Malskær: The Imperative of Regional and International Cooperation

Niels Malskær underscored the existing strong regional collaboration in the Nordic-Baltic area, particularly in energy and defense. He pointed to the increased importance of the Baltic Sea for regional security in the context of European rearmament. Malskær highlighted the need to enhance capabilities in both manned and unmanned maritime vessels for effective surveillance and deterrence. He cited the recent Finnish impounding of a Russian vessel as a practical example of decisive action within international law. Malskær proposed establishing a clearer understanding among the Baltic Sea nations regarding permissible and impermissible activities in the region, especially concerning suspicious "shadow fleet" behavior. He cautioned against over-reliance on NATO assets and advocated for the Baltic and Nordic nations to develop their own security capacities.

Key Takeaways

- **Geopolitical Risks**: Russia was consistently identified as the primary source of security threats, necessitating a strong and unified response.
- **Broad Spectrum of Threats**: Security concerns extend beyond physical sabotage to include cyberattacks, information manipulation, and broader operational safety.
- **The Necessity of Cooperation**: Effective security requires close collaboration between governments, the military, industry stakeholders, and even civil society, both at national and international levels.
- **The Role of Technology**: Emerging technologies like AI and autonomous systems are crucial for enhancing surveillance and reducing the costs of securing vast offshore areas.



- **Strategic Deterrence**: Maintaining a visible security presence, particularly naval forces, is essential for deterring potential adversaries.
- **Building Resilience**: Investing in robust security measures is not just a cost but an essential component of ensuring the long-term viability and energy independence provided by offshore wind.
- **Countering Disinformation**: Proactive efforts are needed to combat foreign influence and manipulation aimed at undermining public support for offshore wind development.

The discussion concluded with a strong consensus on the imperative of integrating security considerations into the very design and operation of offshore wind farms to safeguard these critical energy assets in a complex and evolving geopolitical landscape.

Baltic Sea Offshore Wind Summit: Experts Chart Course to Fill Offshore Workforce Gap

PANELS

A critical discussion unfolded at the Baltic Sea Offshore Wind Summit in Gdansk, as industry leaders grappled with the urgent task of building a skilled workforce to power the burgeoning offshore wind sector. A central panel debate, titled "Shaping the Offshore Workforce," brought together HR professionals, training experts, and policy advocates to dissect the skills gap, propose solutions for attracting talent, and outline strategies for long-term workforce development in this demanding industry.

Moderated by Dr. Antonios Nestoras, the panel featured Božena Petikonis-Šabanienė, Head of HR for Ignitis Renewables; Rihards Stalmanis, Director at BOTC Training; Ekaterine Gogoberishvili, Education and Skills Senior Project Coordinator for WindEurope; and Agnieszka Rodak of the Pomeranian Centre of Competence for Offshore Wind Energy. The discussion underscored the multifaceted challenges and the collaborative spirit needed to ensure the sector has the human capital required for its ambitious growth trajectory.

Agnieszka Rodak: Building Institutional Foundations in Poland

Agnieszka Rodak kicked off the discussion by focusing on the necessity of establishing sustainable institutional frameworks for talent development in Poland. Drawing on research in the Pomerania region, she highlighted a mismatch between the

demand for professions directly and potentially connected to offshore wind and the number of students pursuing relevant vocational training. "If we are talking about challenges, I think we need to focus on in Poland on building institutional solutions not to make building talents at hawk. but to create the sustainable framework for development of the industry".

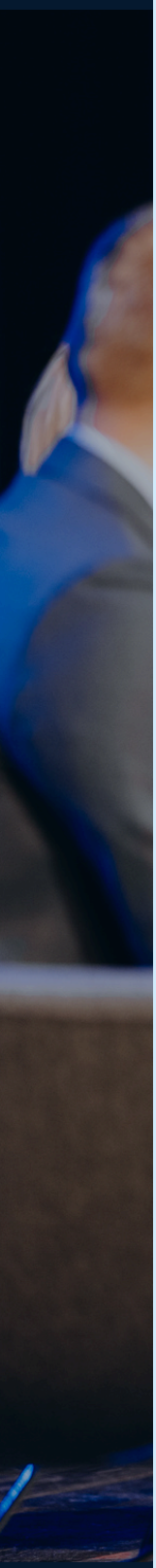
Rodak emphasized the role of the Pomeranian Centre of Competence for Renewable Energy as a collaborative hub involving universities, vocational schools, and industry players to build a training center for practical workshops. She also pointed to a critical shortage of practical training teachers, necessitating engagement with national authorities to reform the education system and make it more attractive for professionals to develop skills in the offshore wind industry.

Rihards Stalmanis: Bridging the Gap Between Training and Industry Needs

Rihards Stalmanis of BOTC Training brought a perspective grounded in the maritime and seafaring industries, drawing parallels to historical concerns about a lack of engineers and navigators. He highlighted a key challenge: while there is demand, companies often seek candidates with significant prior experience. "I think the main problem it not about preparing them but about how we integrate new people, new entrants to the industry. In my opinion that is the main issue - how can we manage that?".

Stalmanis emphasized the need for a basic level of knowledge among blue-collar workers before they enter the offshore sector, suggesting that with a solid background, the preparation time for specific offshore tasks is relatively short. He also noted the importance of providing options for those

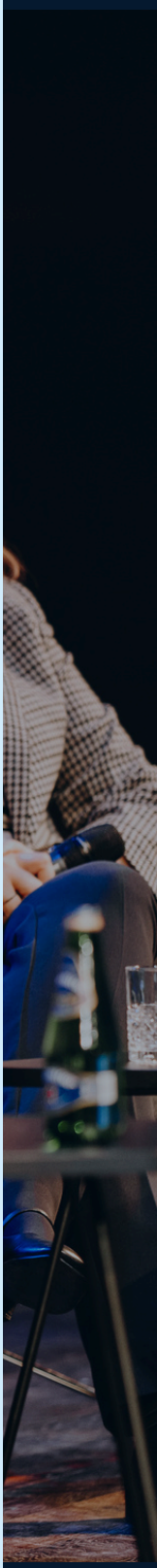
who may not be suited for offshore work to find opportunities onshore, recognizing that not everyone is a fit for the demanding offshore environment. He also mentioned the adoption of VR technologies in their training processes to enhance understanding among younger trainees.



Ekaterine Gogoberishvili: A Pan-European Approach to Skills Development

Ekaterine Gogoberishvili from WindEurope provided a broader European perspective, echoing the concerns about shortages not only in technicians but also in engineers. She highlighted WindEurope's involvement in the EU-funded Flores program, which identified four occupational groups with the highest demand in the renewable energy sector: science and engineering, administration and commercial business operations, and information communication technologies. Notably, offshore renewable energy technicians were identified as being at the top of the list of needed job profiles, with digital and technical skills being common requirements.

Gogoberishvili emphasized the significant gap between the digital skills required by the job market and the basic digital skills possessed by a large portion of the adult population. In response to the skills challenge, WindEurope advocates for both long-term and short-term solutions, including education and industry partnerships to attract young people and working with policymakers to integrate industry needs into education policy. She also pointed to the potential of transferable skills, citing fishermen as a prime example of a workforce with sea-related skills that could be upskilled for the offshore wind industry. Discussing broader EU initiatives, Gogoberishvili highlighted the "Union of Skills" strategy and efforts towards skills portability across European countries.

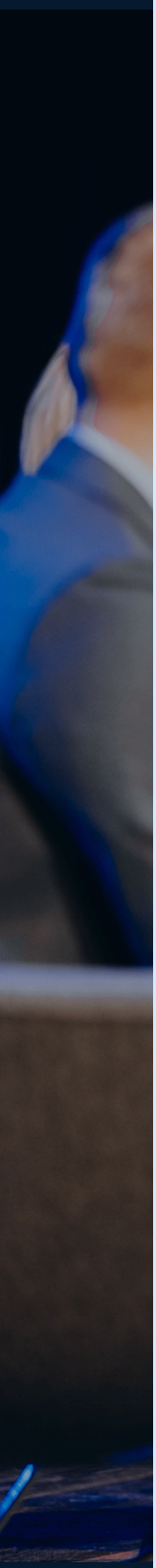


Božena Petikonis-Šabanienė: Fostering Collaboration and Embracing International Talent

Božena Petikonis-Šabanienė of Ignitis Renewables, operating across the Baltic states and Poland, stressed the interconnectedness of the regional talent pool and the need for a collaborative approach among companies. "I think that the potential really lies in all companies acting in this industry. So not only developers again but as well those who are in whole u value chain uh oper I think to join the forces". She highlighted the complexity of the offshore wind sector, requiring diverse skills across engineering, technical, environmental, legal, and supply chain domains, with supply chain specialists being in high demand across the region.

Petikonis-Šabanienė strongly advocated for being open to international talent, drawing on the experience of other countries with established offshore wind industries. "One of things which very much strikes me today is that we need to be open for the international talent. We are not inventing the wheel. Offshore industry has already been operating in other countries for a long time. So, being open to learn

is very important to get to this competence level". She also shared a success story of attracting Lithuanian diaspora professionals back to the country. While acknowledging the need to develop local talent, she recognized the mobile nature of the offshore wind workforce and the importance of facilitating cross-border movement of skilled individuals.

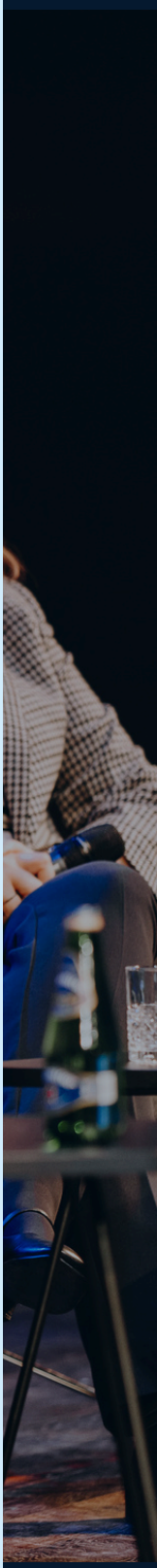


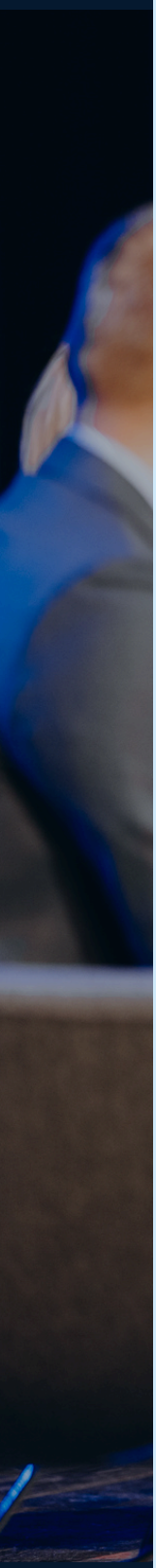
Addressing the Attraction Challenge

The panel also delved into the reasons why young people might not be gravitating towards the offshore wind sector. Petikonis-Šabanienė highlighted the importance of raising awareness and dispelling outdated perceptions of the energy industry through programs like "Energy Smart Start". She also pointed to the broader issue of declining interest in STEM fields among young people. Rodak emphasized the need to showcase the career development opportunities and high wages offered by the offshore wind industry, especially as it is a relatively new sector in Poland.

The Role of EU Support and Migration

The discussion touched upon the potential for EU support, with Rodak calling for both regulatory frameworks and financial assistance for building training centers and promoting the industry. The moderator raised the question of attracting migrant workers, given Europe's aging population and potential workforce shortages in the future. While acknowledging the complexities of immigration policy, Gogoberishvili noted ongoing discussions at the EU level regarding strategies for attracting both highly skilled and technically skilled workers, as well as potential frameworks for recognizing vocational education and training qualifications across Europe and beyond. Stalmanis agreed on the need to welcome skilled workers to Europe.



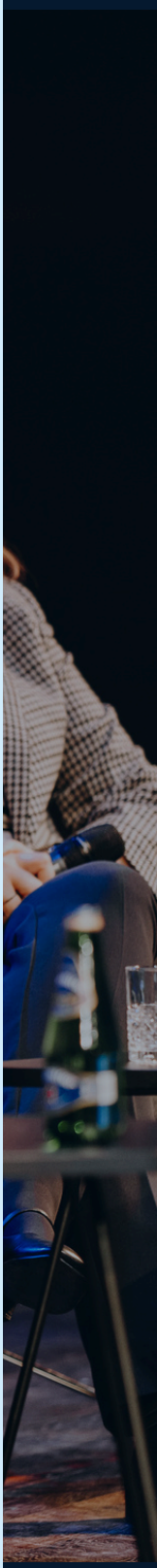


Key Takeaways

The panel discussion underscored the critical and multifaceted nature of the workforce challenge facing the offshore wind sector. Key messages included:

- Urgent need for collaborative efforts across the entire industry value chain to develop talent.
- Importance of building robust institutional frameworks for training and education, including addressing the shortage of qualified teachers.
- Necessity of bridging the gap between academic or vocational training and the practical demands of the industry, including effective integration of new entrants.
- Value of transferable skills from related sectors as a short-term solution.
- Critical role of STEM education and the need to attract more young people to technical fields.
- Importance of proactive engagement to raise awareness about the opportunities and modern nature of the offshore wind industry.
- Strategic advantage of embracing international talent and facilitating the movement of skilled workers.
- Potential for EU and national policy support in terms of regulations and financial resources for workforce development.

Insights shared during the "Shaping the Offshore Workforce" panel at the Baltic Sea Offshore Wind Energy Summit highlighted the collective determination to overcome the skills gap and build a resilient workforce that can deliver on the ambitious goals of the offshore wind sector in the Baltic Sea region and beyond, contributing significantly to Europe's energy transition.



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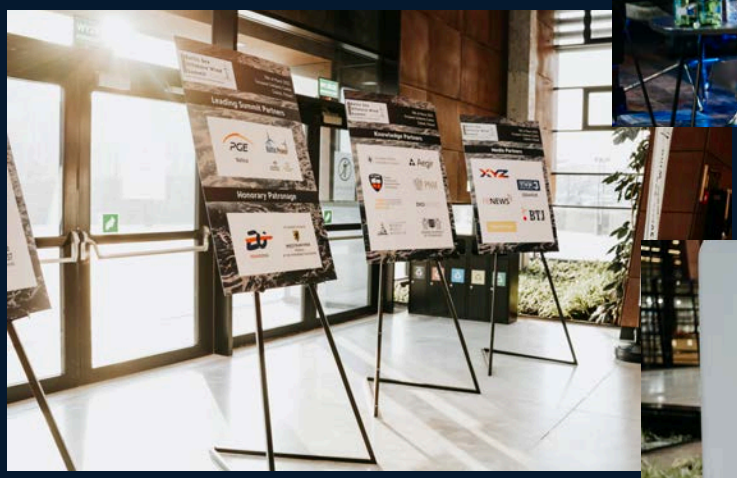

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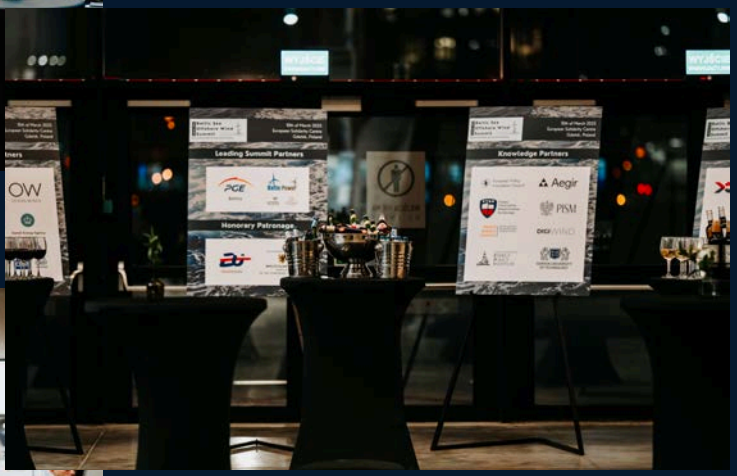

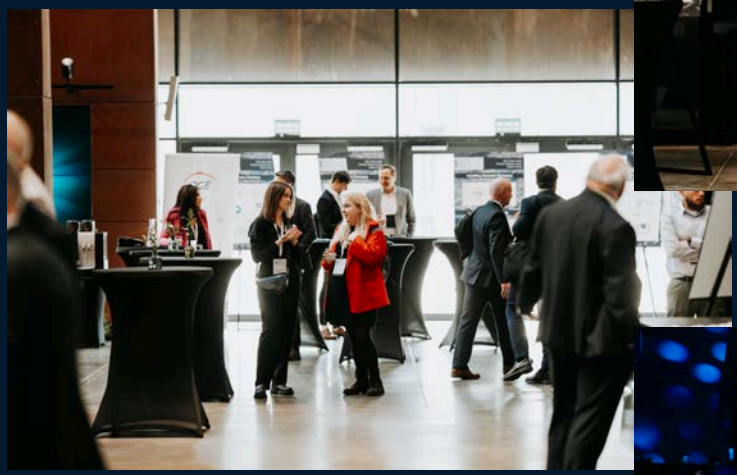

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