The Polish energy market: Partner for a Baltic Sea cooperation

17th Inter-Parliamentary Meeting on Renewable Energy and Energy Efficiency

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### Setting the scene...

<table>
<thead>
<tr>
<th>Category</th>
<th>Data/Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>38 million</td>
</tr>
<tr>
<td>% of EU’s population</td>
<td>7.5%</td>
</tr>
<tr>
<td>GDP</td>
<td>3% of EU GDP</td>
</tr>
<tr>
<td>GDP per capita</td>
<td>39% of EU average</td>
</tr>
<tr>
<td>Current market prices</td>
<td></td>
</tr>
<tr>
<td>CO₂ emissions</td>
<td>9% of EU CO₂ emissions</td>
</tr>
<tr>
<td>Energy dependency</td>
<td>29% energy import dependency vs. EU average of 54%</td>
</tr>
</tbody>
</table>

Source: EU Energy in Figures 2016
Poland is not exactly average when it comes to fuel mix...

Gross electricity generation by fuel, %

Poland

- Petroleum and products: 13%
- Solid Fuels: 81%
- Renewables: 5%
- Natural gas: 1%

EU-28

- Nuclear: 28%
- Solid Fuels: 25%
- Renewables: 29%
- Gases: 15%
- Petroleum and products: 2%
- Wastes, Non Renewable: 1%

Source: EU Energy in Figures 2016, European Commission
...but it is moving into the right direction!

Between 2008 and 2015
RES share in installed capacity has grown from 4% to 20%

*2012 compared to 2015
...Is that quick enough?

Evolution of fuel mix, %

Germany

- 8 pp

For the past 20 years, Poland has been moving away from coal at a faster pace than Germany

Poland

- 14 pp

Source: Carbon Brief, EU Energy in Figures 2016
Which way to go forward? Choices we’ve got:

- **Nuclear**: Easier said than done?
- **Gas**: Political issue
- **Renewables**: Yes, at reasonable cost
Poland is already the 7th market for wind in Europe

Source: WindEurope
...and the potential is still there, especially for offshore

WindEurope 2030 offshore wind scenario for Poland:

- Low: 2200 MW
- Central: 3200 MW
- High: 6000 MW

Cost!

Prerequisites:
- Industrial potential
- Regionalisation
Thank you!

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