GREEN ENERGY
EXPORT DAY 2025

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WORKSHOP
ENERGY EFFICIENCY POLAND
AGENDA

Insights from the embassy: What is happening in Poland
- Katarzyna Wojda, Green Transition Expert, Danish embassy in Warszawa

Renovation Wave: EE – effective supportive instruments
- Aleksandra Stepniak, Public Affairs Manager, Velux Poland and Member of the Board at Renovation Wave Association
- Joanna Remiszewska-Michalak, PhD, Public Affairs Manager, Rockwool Poland and Chairwoman of the Climate Council, UN Global Compact Network Poland

Decarbonizing industry in Poland
- Michal Andruszkiewicz, Partner, CMS Law

Discussion: Opportunities in decarbonizing industry and buildings in Poland

Moderator
- Hans Peter Slente, Head of Green Energy Export, DI Energy

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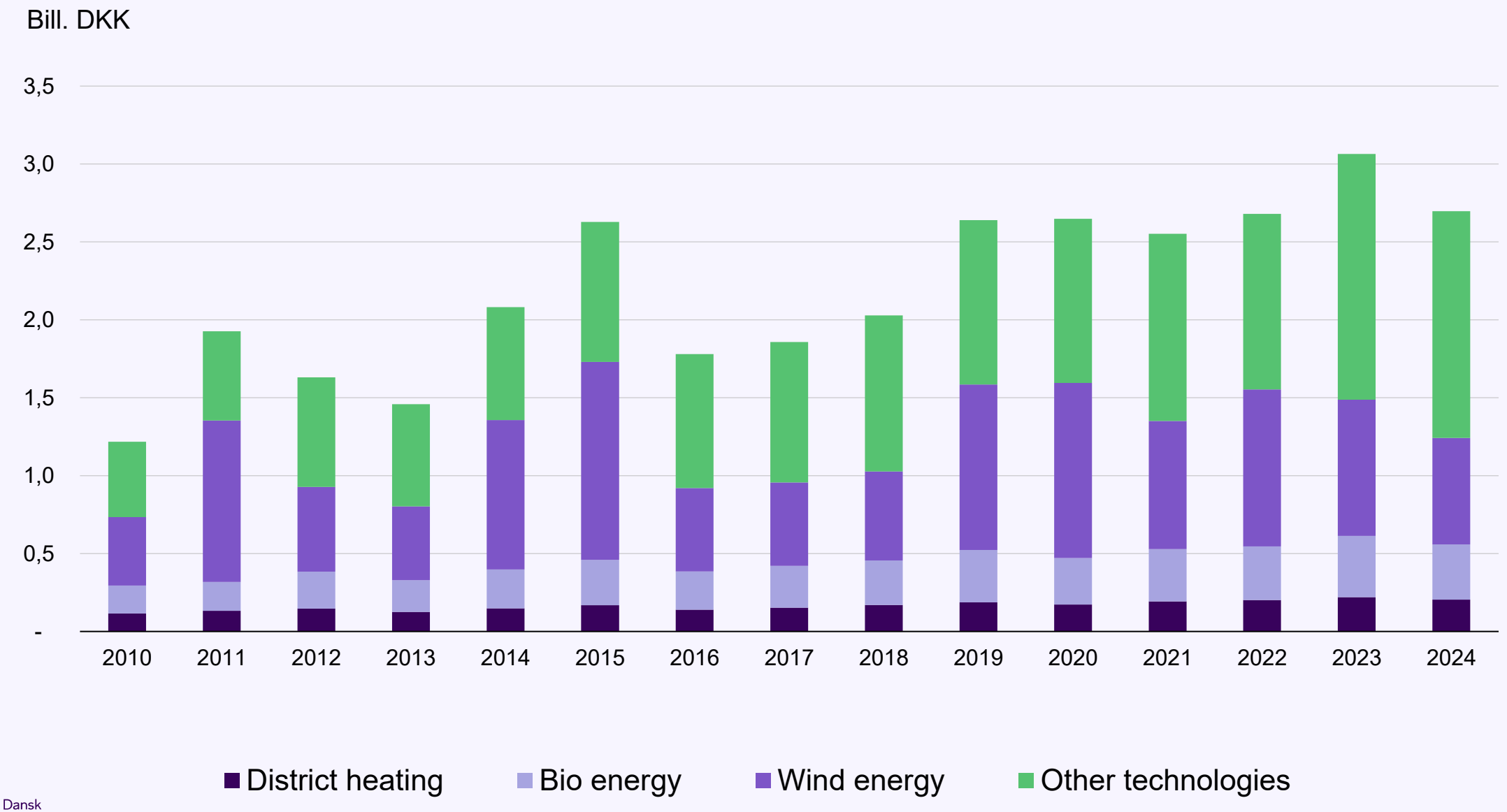
Danish exports of energy technology to Poland (2024)



Dansk Industri

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ROYAL DANISH EMBASSY
Poland

DENMARK IN POLAND

Green Energy Export Day, August 27, 2025

Katarzyna Wojda, Green Transition Expert /ECONOMIC DIPLOMACY

Geographically close neighbour

- EU member since 2004
- NATO member since 1999
- 400 years of diplomatic relations between Denmark and Gdansk in 2025

LONG TERM RELATIONSHIP

Małgorzata II i Lech Wałęsa podczas balu w Otwocku Wielkim, 06.07.1993 r.

Embassy of Denmark in Poland

- EU members/ same energy directives/ EE first
- NATO members/ same security goals
- Energy: Baltic Pipe, wind turbines, Energy Efficiency
- 104 years of PL-DK diplomatic relations were celebrated in 2021 with the Royal Couple visit to Poland
- Queen Margaret visited Poland in 1993
- King Frederik's very first visit was to Poland in 2024
- Poland is Denmark's 10th largest export market
- More than 751 Danish companies are represented in Poland
- Danish companies employ more 75,000 people in Poland
- **2025 - PL-DK EU Presidency + 400 years of diplomatic relations between Gdansk and DK**

Green Energy Export Day, August 27 2025

ENERGY POLICY - PEP 2040

The energy transition will be based on three pillars:

I pillar Just transition	II pillar Zero-emission energy system	III pillar Good air quality
Transition of coal regions	Offshore wind energy	Heating transition
Reduction of energy poverty	Nuclear energy	Transport electrification
New industries related to renewable energy and nuclear energy	Local and civic energy	Climate-friendly House

The statutory goal of the state's energy policy is energy security , while ensuring the competitiveness of the economy, energy efficiency and reducing the impact of the energy sector on the environment.

2025 - TOGETHER IN EU presidencies

UDENRIGSMINISTERIET
The Trade Council

	Security and Competetivness via decarbonisation and EE increase	
Poland (January 1st 2025 – June 30th 2025)	Phasing out Russian fuels, supporting industry decarbonisation, grid integration, focus on security and resilience	
Denmark (July 1st 2025 – December 31st 2025)	Driving EU 2040 climate target, advancing CBAM & Industrial Decarbonisation legislation, renewables & electrification	

POLAND 2025 -Political development

President: Karol Nawrocki (supported by PiS-right wing)– since 6th August 2025

Prime Minister: Donald Tusk (PO/ Civic Platform) - since 2023 Elections leading the Coalition government

- 24th July 2025 – PM Tusk re-constructed his government after the coalition lost in Presidential elections

- 25th July Ministry for Funds and Regional Policy has had the Document on Poland's development (**KRK 2050.PL**) adopted by the government

WHY Poland

- Stable economic growth
- Large population with increasing purchasing strength
- Closer cooperation between Denmark and Poland in the EU Presidencies
- EU funds - **under the Commission's proposed budget for 2028-2034, Poland is expected to receive more than 123 billion EUR, making it the largest recipient among all member states**
- Geopolitically good location for supply chain durability
- Scandinavia perceived as a credible business partner

POLISH ECONOMY

Gdp

- Polish economy is currently emerging from a slowdown
- Poland ranks 50 in terms of GDP per capita in the world.

2024-2025

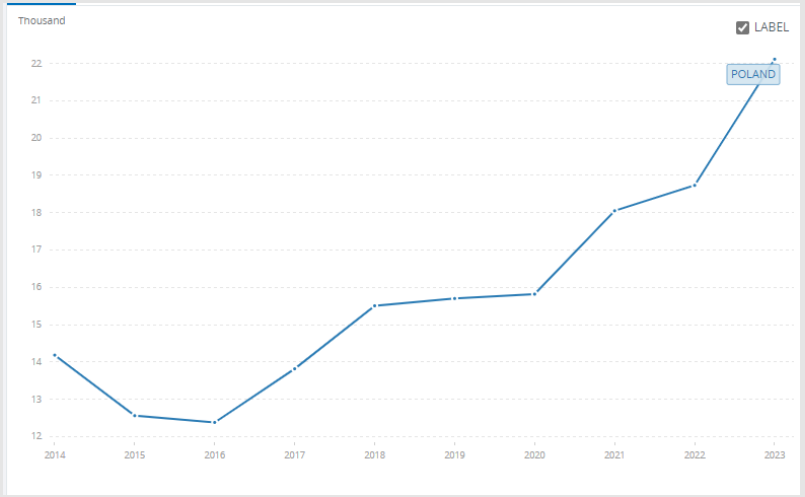
After a decrease in GDP of 0.2% from 2023, GDP had grown to **2.9 %** in 2024. expected to grow 3,7% in 2025

- High consumption is the main driver of economic growth (PIE)
- Low inflation, but still above NBP target at **4 %**
- Wage growth will maintain a double-digit pace – averaging **12.3 %** according to Polish Economic Institute

UNEMPLOYMENT

- The unemployment rate in Poland remains the lowest in the European Union
- **PL - 5.4 %** February, 2024 (Eurostat)
- EU average: 6.0 %
- Euro area: 6.4 % (July, 2024)

GDP Growth in Poland



GLOBAL SUSTAINABILITY INDEX

POLAND – ranked **109** by earth.org
DENMARK - ranked **2** by earth.org

ECONOMIC DIPLOMACY – we can help

- **GPA** - Global Public Affairs support
- **Market Intelligence**
- **Technology transfer – EIFO funded**
- **Stakeholder management – G2G, G2B, B2B** - building alliances with Polish Stakeholders (decision makers, corporate clients, end users)
- **Joint export promotions /** Delegation visits

POLAND – YOUR Energy Efficiency focal POINT

KATARZYNA WOJDA
GREEN TRANSITION EXPERT
Energy

Speaks: Polish & English

Connect on

Questions?

Interested in poland?

contact us
@ danish embassy in warsaw
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THANK YOU

Katarzyna wojda
katwoj@um.dk

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Enery Efficiency
effective supportive instruments

Joanna Remiszewska & Aleksandra Stępniak

Fala Renowacji

Building resources in Poland - characteristics

Building type	Number of buildings	Share in the building stock	Share in the total usable area
Single-family building	6 930 433	45,6%	32%
Multi-family building	570 889	3,8%	17%
Collective housing building	29 564	0,2%	1%
Public buildings	591 641	3,9%	12%
Farm, warehouse, and production buildings	7 084 829	46,6%	38%
Sum	15 207 356		

Buildings in Poland consume an average of approximately **402 TWh of thermal energy per year.**

49% of single-family homes were built before 1970. **19%** between 1970 and 1990.

60% of multifamily buildings were built before 1970. **20%** between 1970 and 1990.

In Poland, approximately 70% of buildings are considered energy inefficient and require thermal refurbishment to improve energy efficiency, reduce fuel consumption and cut GHG emissions. Furthermore, approximately 15% of them fall into the worst energy performance category.

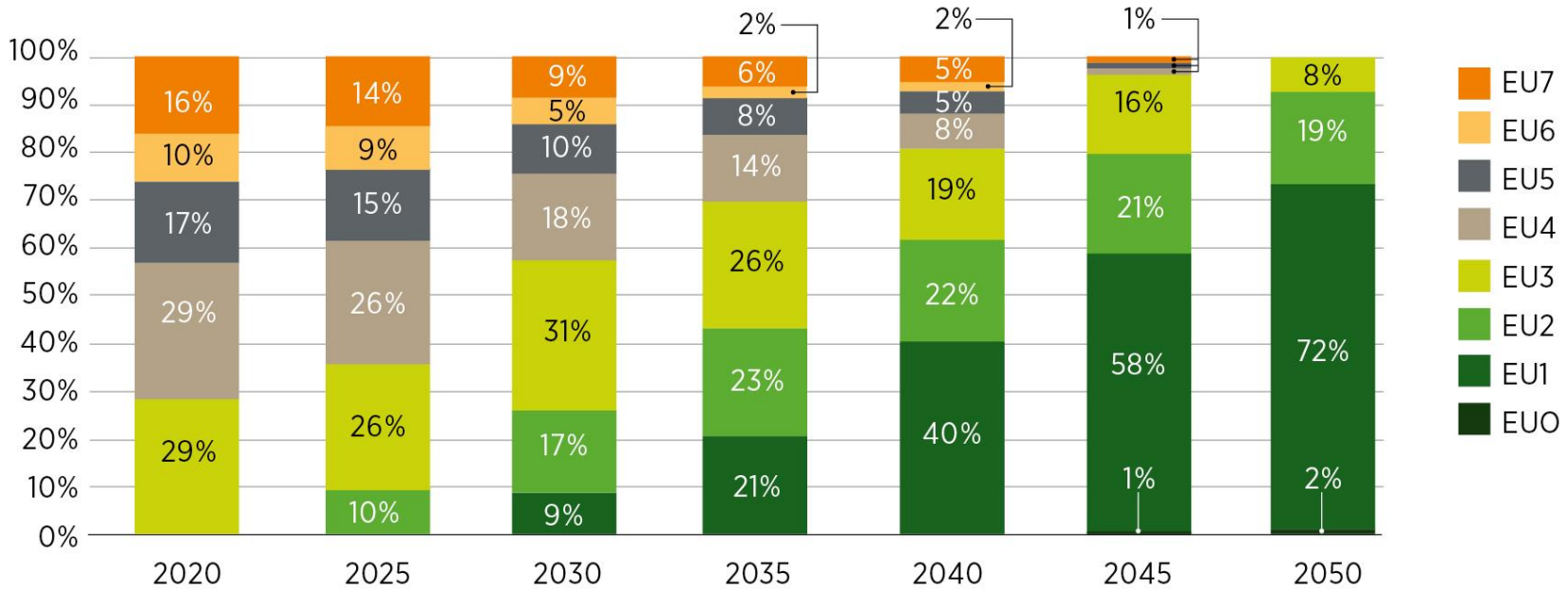
Modernisation of the building stock in Poland has a huge potential for energy savings, estimated at **305 TWh per year.** The largest savings can be achieved in single-family houses, where the potential is **130 TWh.** In multi-family buildings, the savings could reach **55 TWh**, while in public buildings the savings could reach **3.7 TWh**.

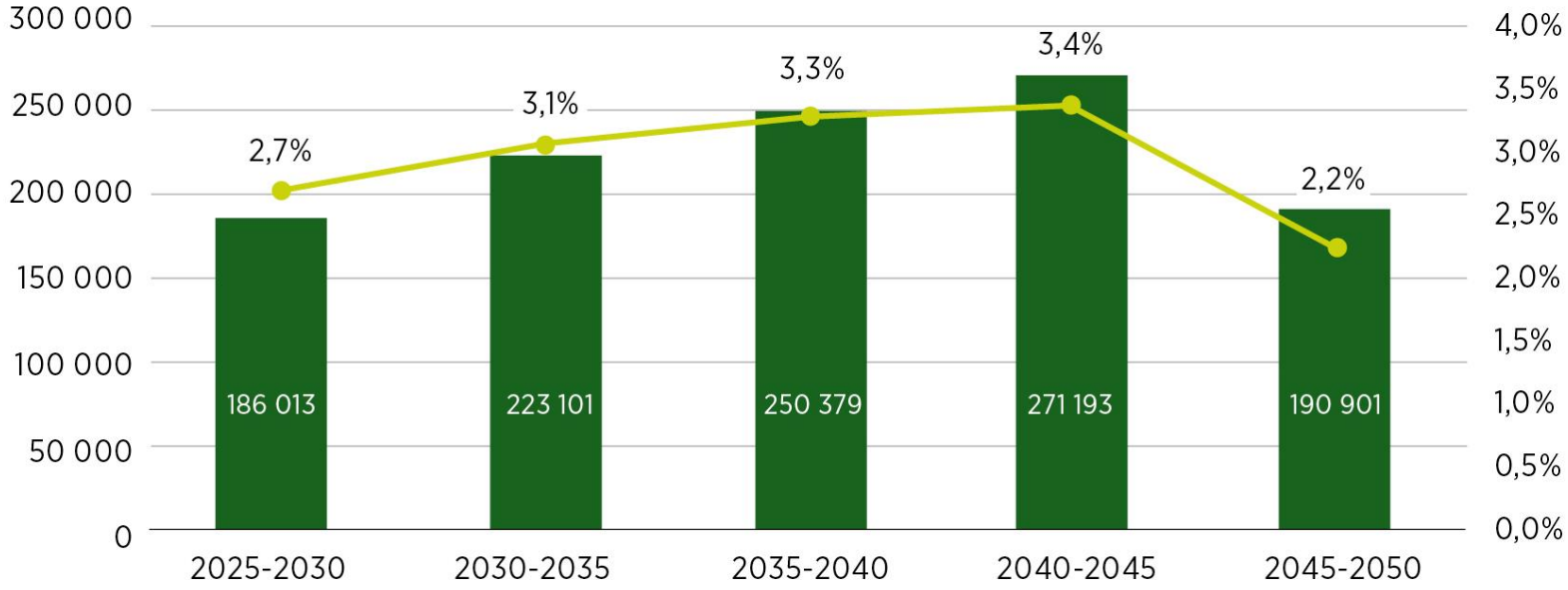
Fala Renowacji

NBRP
(project)

Scenario for
single family houses

(3% = app. **200 000** /year)

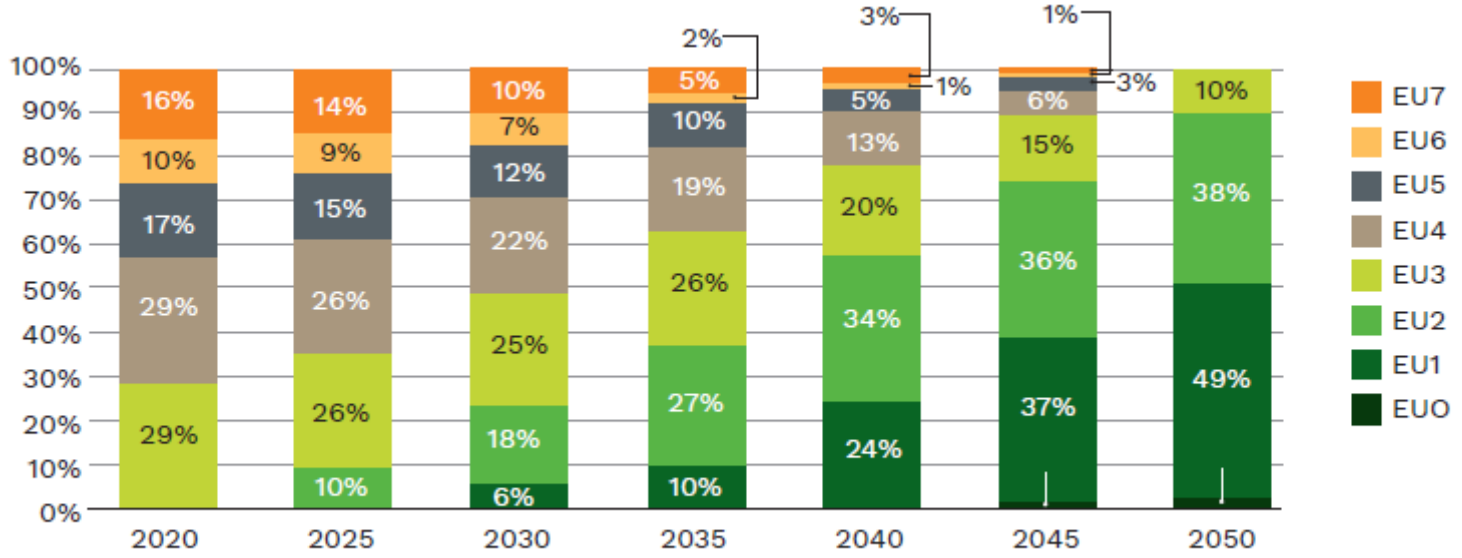


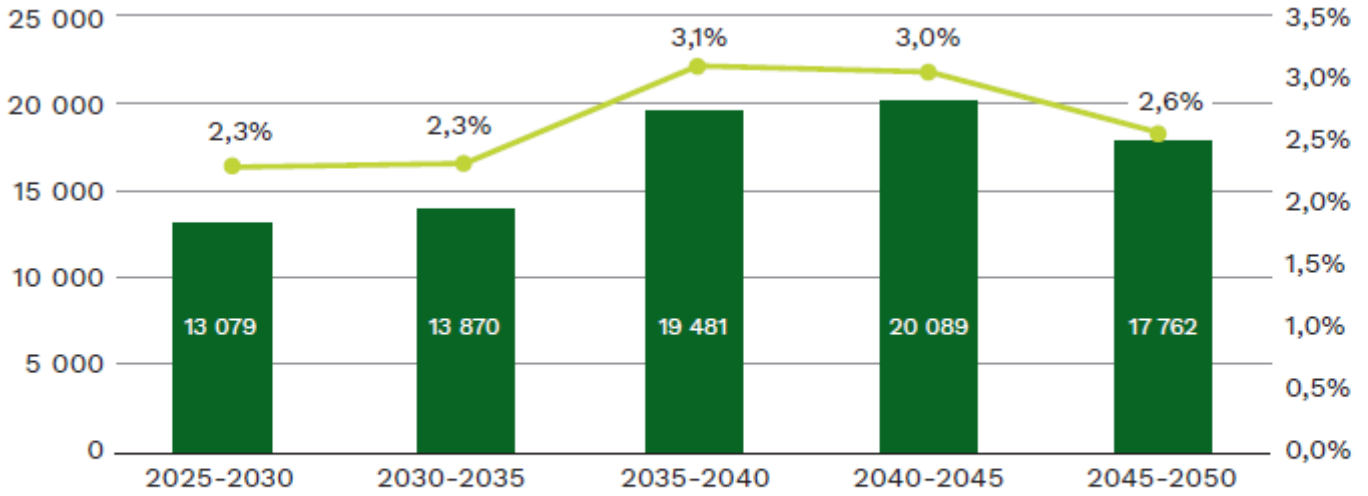


Fala Renowacji

NBRP
(project)

Scenario for
multi family houses





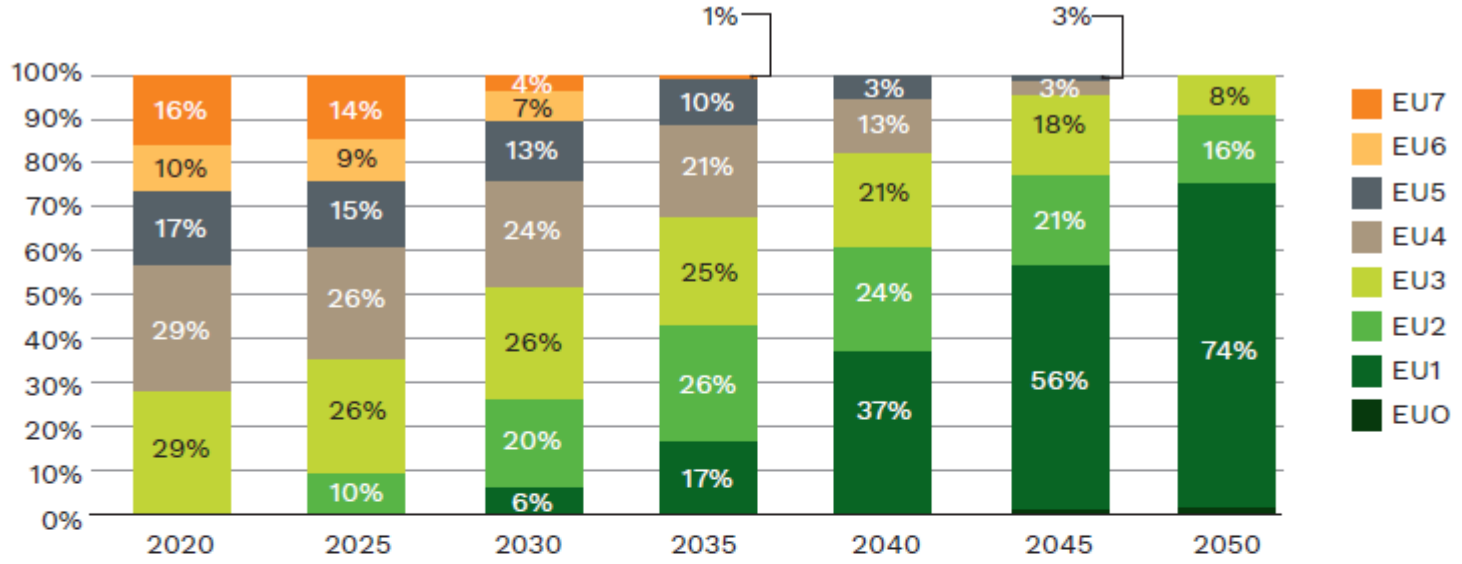
Average annual number of buildings undergoing renovation

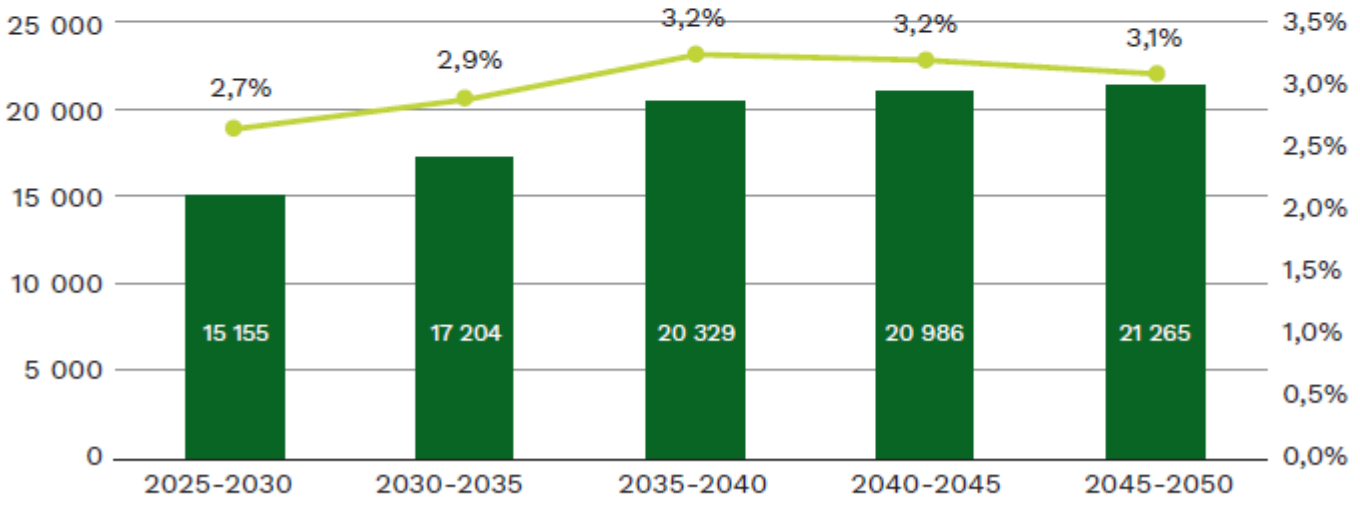
Average annual renovation rate

Fala Renowacji

NBRP
(project)

Scenario for **public buildings**





Average annual number of buildings undergoing renovation

Average annual renovation rate

Fala Renowacji

The Clean Air Program

For whom?

The owner or co-owner of a single-family house, who have held this right for at least 3 years.

For what?

Improving energy efficiency and exchanging heating source

How much?

The level of funding depends on an income, the energy class of the building, and its heat demand.

- Basic level (subsidy up to 40% of costs)
- Increased level (subsidy up to 70% of costs)
- Highest level (subsidy up to 100% of costs) – only for buildings with Eu>140 kWh/(m2*year)

The Clean Air Program

No.	Condition of the value of the energy demand indicator for heating for a building/residential unit		Type of undertaking
	Before the undertaking	After the undertaking	
1	Below 80 kWh/(m^2*year)	below 80 kWh/(m2*rok)	only heat source
2	From 80 to 140 kWh/(m^2*year)	If only the heat source is replaced within the project: no increase	only heat source or only thermal modernization (if an effective heat source is already installed) or heat source and thermal modernization.
		When thermal modernization is carried out as part of the project: no more than 80 kWh/(m^2*year), with at least a 40% reduction in the indicator value.	
3	Above140 kWh/(m^2*year)	No more than 140 kWh/(m^2*year), with at least a 40% reduction in the indicator value	Only thermal modernization (if an effective heat source is already installed) or heat source and thermal modernization

Fala Renowacji

Thermo Program

For whom?

Property Managers of multi-family buildings, housing cooperatives, and municipalities.

For what?

Improving energy efficiency and exchanging heating source:

- Thermo-modernization bonus with the option of a thermo-modernization grant
- Renovation bonus
- bonus with the option of a grant (buildings of local governments)

How much?

- 26% of the costs of the thermal modernization project
- 31% of the total costs of the thermal modernization project along with the RES project involving the purchase, installation, construction, or modernization of renewable energy source installations (the costs of RES installations must constitute at least 10% of the total costs of thermal modernization and RES installations)
- The amount of the thermal modernization bonus may be increased due to the thermal modernization grant – additional support of 10% of the net investment costs for deep and comprehensive thermal modernization of a multi-family building.

Fala Renowacji

Multidimensional benefits of buildings retrofit by 2035

ENERGY SECURITY

- hard coal import's reduction by half
- natural gas import's reduction – 25%

ECONOMY

- new green jobs – 94 thous.
- materials and equipment - market's development
- health care spendings' reduction
- GDP growth – 18 bn PLN
- Reduction in sick leave – 600 thous. days annualy

ENVIRONMENT

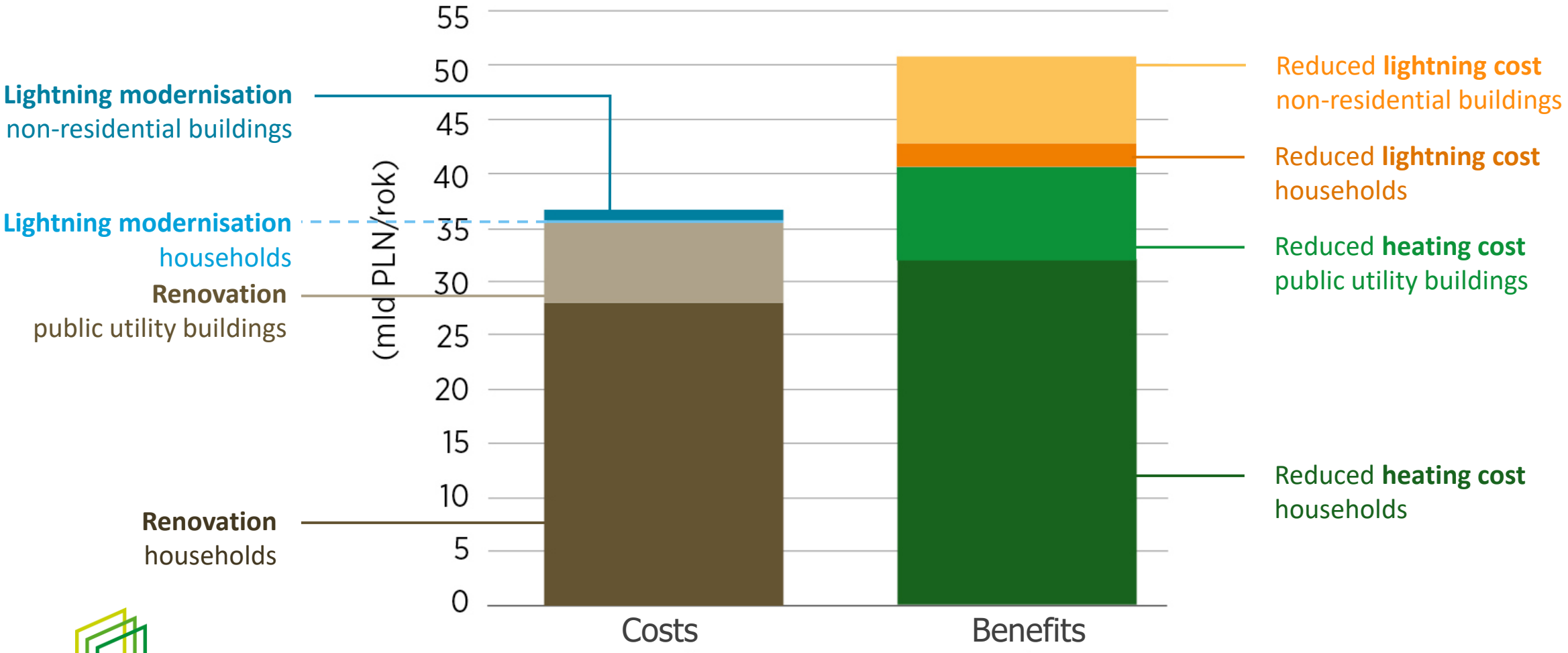
- air pollution reduction B(a)P 44%, PM2,5 26%
- greenhouse gas emissions' reduction – 10%

SOCIETY

- living and working comfort's improvement
- better well-being, decreased morbidity and mortality
- energy poverty reduction
- increase in the value of the building
- Reduction of heating costs 40 bn PLN annualy

Fala Renowacji

Costs and benefits of EPBD implementation (2035)



Fala Renowacji

Tough to count = non-existent?

- ✓ Reduction of vulnerability to fuel market disruptions
- ✓ Lower cost of electricity transformation (peak power demand reduction)
- ✓ Labour market (production + services)
- ✓ Possibility of heating entire premises
- ✓ Relief to the health care system (no. of hospitalizations, consultations, illnesses, allergies), lower medical costs and work absences
- ✓ IEQ = life quality
  (mood, sleep quality, concentration level, work/learning efficiency)
- ✓ Quality of (public) service (schools!)
- ✓ Appearance / attractiveness of the building
- ✓ Value, possibility to **sell** or **rent** property

HOW to highlight and use those benefits as motivations?

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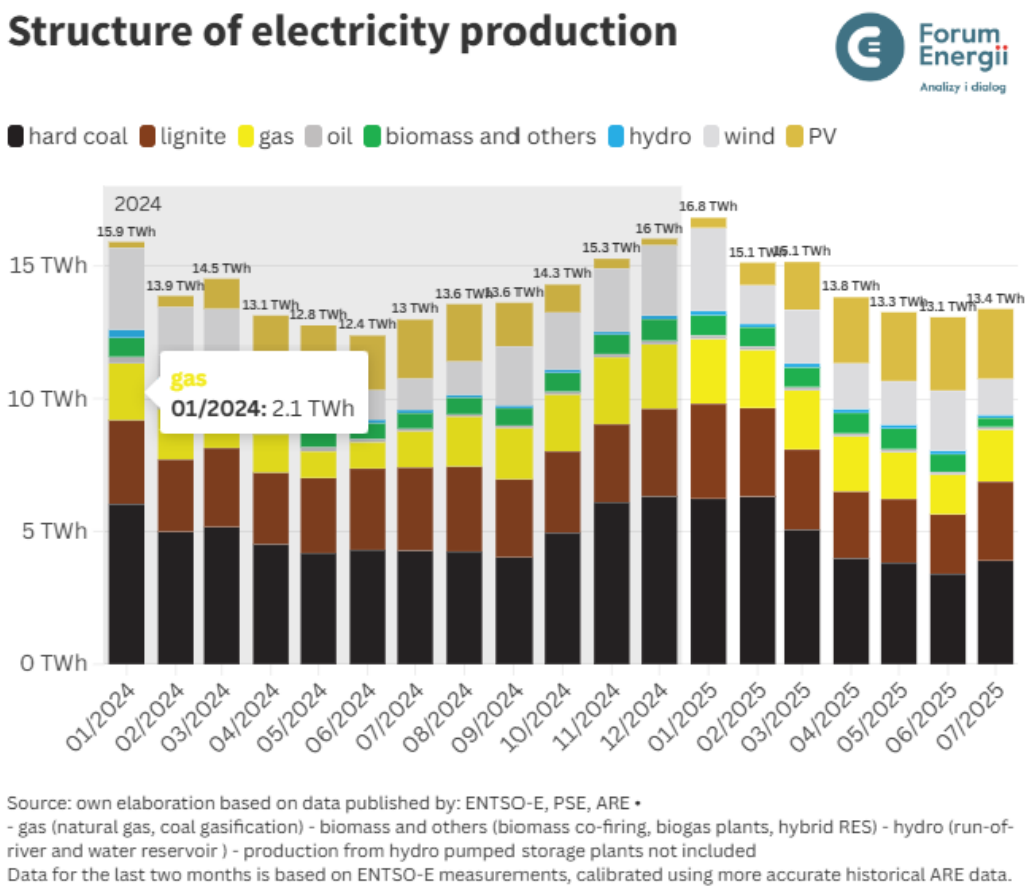
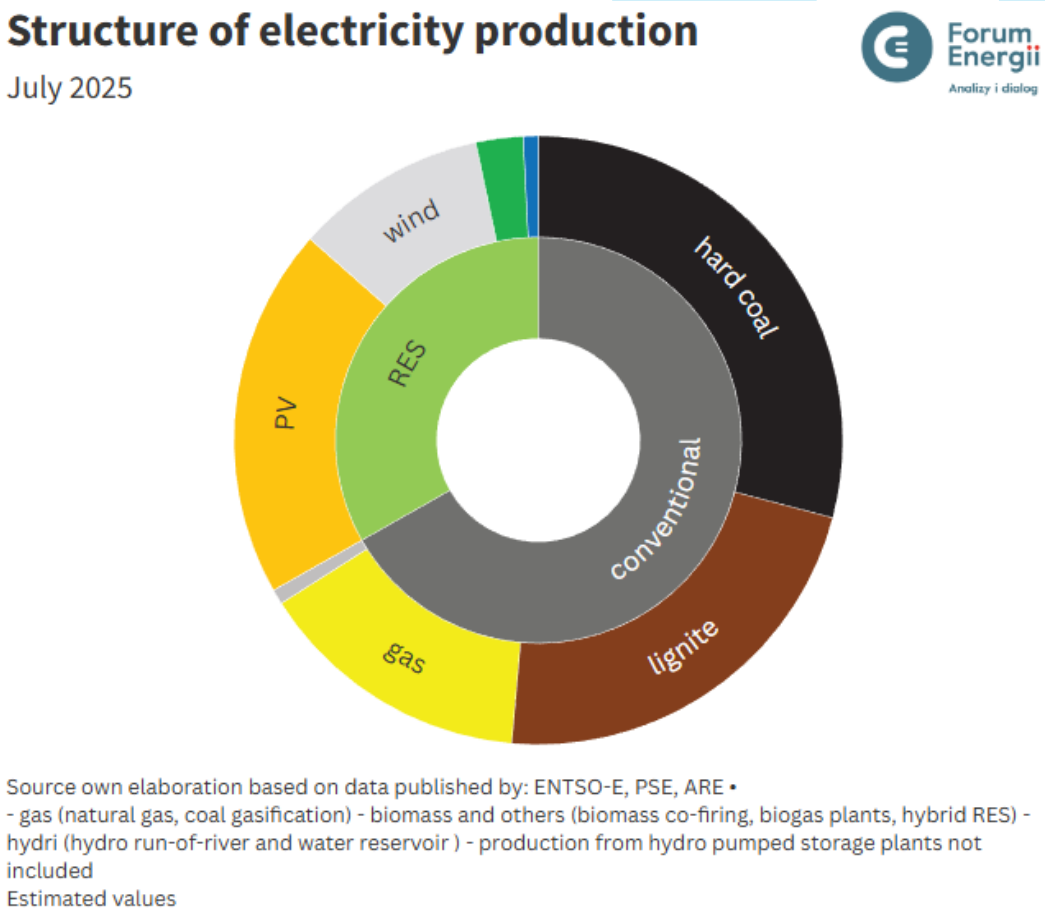
Business case 2: Decarbonization of industry in Poland

Green Energy Export Day 2025, Copenhagen

Energy mix





Source: Forum Energii - July 2025 - Renewables in the shadow of summer

Decarbonisations goals

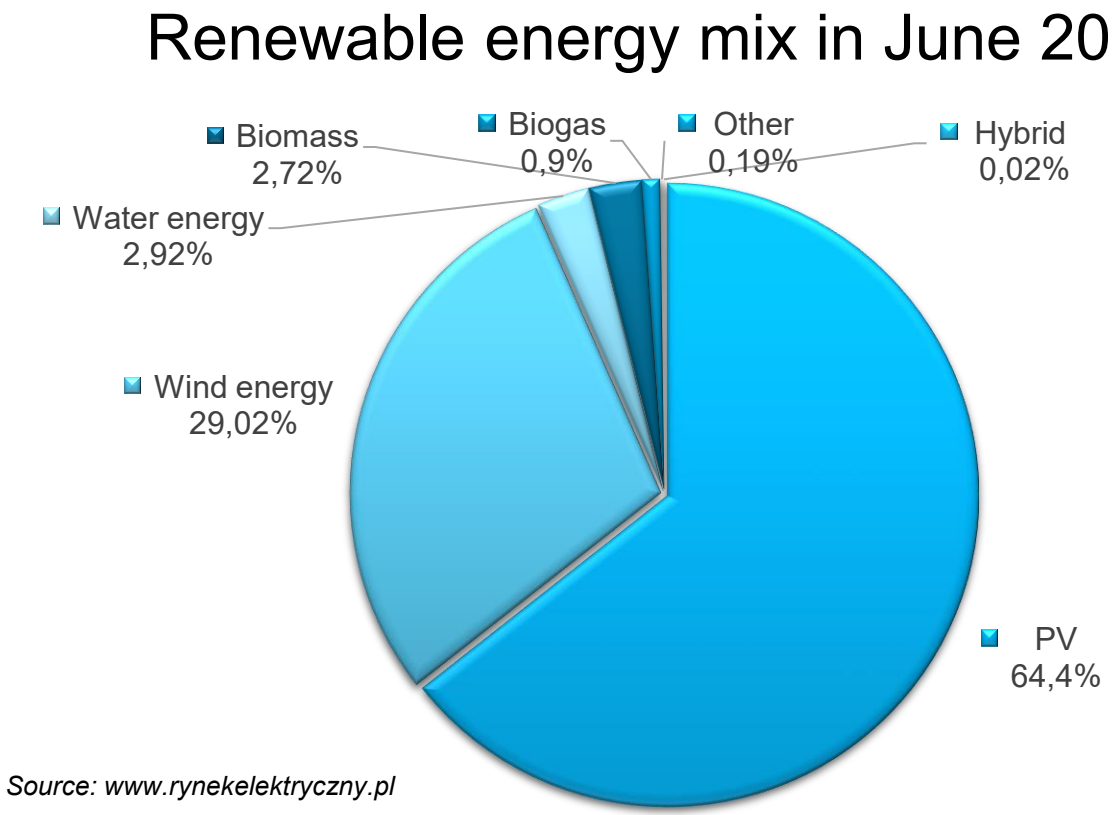
Actual Poland's Energy Policy until 2040

- Offshore wind energy – installed capacity will reach approx. **5.9 GW in 2030** and approx. **11 GW in 2040**
- Significant increase in installed PV capacity to approx. **5-7 GW in 2030** and approx. **10-16 GW in 2040**
- Increase in the share of RES - in 2030, the share of RES in gross final energy consumption will be **at least 23%**
- In 2030, gas networks will be able to transport a **mixture** containing approx. **10% decarbonised gases**

National Energy and Climate Plan

- Work on the updated od the NECP. Initial version was sent to the European Commission on 1 March 2024.
- Poland has declared that it will **achieve a 32.6% share of RES** in gross final energy consumption by 2030, as its contribution to the new EU-wide target for 2030. This target will be achieved through the combined use of renewable energy sources in electricity, heating and cooling, and transport. Forecasts indicate that in 2040, the share of RES in gross final energy consumption could reach 58.4%.

Renewable energy sources



Source: www.rynekelektryczny.pl

cPPA

- key mechanism for decarbonising businesses
- direct purchase energy from RES
- long-term energy price security
- achievement of ESG goals

Battery energy storage systems

Main auctions for 2021–2028 and additional auctions for 2012–2025 – contracts with a total capacity of **9.5 GW** were concluded.

PSE has already issued grid connection conditions for **30 GW** in energy storage facilities

Bankability of the projects in Poland

Potential sources of revenue

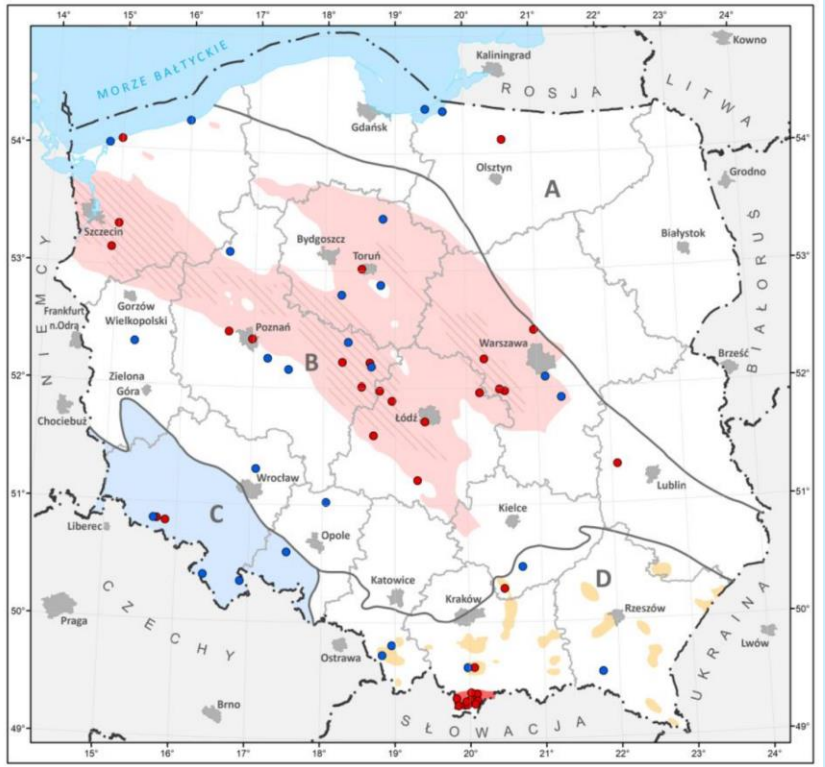
- Capacity market
- energy trading (arbitrage)
- balancing services
- ancillary and flexibility services provided to DSO

Decarbonizing of the heating sector

Cooperation between **Veolia Energia** (heat supplier) and the Danish company **Innargi**

Łódź: Seismic surveys are currently being conducted. Geothermal energy supplies with a capacity of approx. 200 MW are planned.

Poznań: Seismic surveys have been conducted. Heat obtained from geothermal installations can cover up to 20% of the city's heating system demand. Current plans assume that geothermal energy will supply the network in 2029.



Source: ios.edu.pl

Hydrogen

In 2021, Poland adopted the **Polish Hydrogen Strategy**, one of the objectives of which is to create a stable regulatory environment.

New law introduces provisions into the Polish legal system specifying the rules for the trade, transport, and storage of hydrogen as an energy product (similar to gas market regulations).

These provisions apply from 20 January 2025.

Challenges: (i) currently, there are **no dedicated support systems** for hydrogen projects (only specific subsidy programs); (ii) no regulations for new rules have been adopted yet, especially the regulation on the functioning of the hydrogen system.

Implementation of the hydrogen system and new market players (including hydrogen transmission system operators and hydrogen distribution system operators).

Nuclear Power Plant in Poland

Poland plans to build **two** large-scale nuclear power plants with a total capacity of **6 to 9 GWe**, replacing coal-fired units and preventing an **imminent power deficit** by 2040.

The energy sector is awaiting an **updated Polish Nuclear Energy Programme** (previous version is from 2020), expected to be published this year.

The **first nuclear power plant** in Lubiatowo-Kopalino (3.75 Gwe) is scheduled to begin construction in 2028, with the first reactor expected to be operational by 2036.

The project has already obtained the **environmental decision** (in September 2023) and the **location decision** (in October 2023).

Crucial legislative actions

Reforms to boost onshore wind energy - local municipalities will set in their zoning plans the distance between wind turbines and residential buildings – a minimum of 500 meters.

Offshore wind energy: extension of the validity period of permits and location arrangements for offshore wind farms and power transmission facilities.

Grin connections: Flexible grid connections agreements (GCA) - applied in cases where connection to the grid would not be possible **under normal conditions** using the existing infrastructure due to limited grid capacity

Simplifying the grid connection process and cable pooling **for the implementation of all installations** in the formula of sharing a connection with simplification of procedures (not only RES installations)

Auctions for biomethane power plants with a capacity of over 1 MW and 20-year contracts for difference.

Supply of biogas via direct pipelines – support for local and flexible energy supplies.

Nuclear regulation: (i) staged construction permitting - a construction permit for only those parts of a nuclear facility that cannot operate independently (a phased approach to construction and regulatory approval), (ii) early works permits - the possibility of granting building permits specifically for early or preparatory construction works.

Let’s stay in touch!

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