

## Energy Projects in Poland – Last Update October 2017

Investor	Investor's ownership status	Project	Power generation capacity	Heat generation capacity	Fuel	Estimated date of completion	Deadline for tender	Background	Language of the tendering documents
ENERGA	Partially state-owned (the State Treasury being the dominant entity)	Construction of the combined cycle power plant in Grudziądz Est. net value: <b>unknown</b>	420-600 MWe	-	Gas	-	-	The project has been frozen. Investor analyses different scenarios of the power plant in Grudziądz, including construction of the cogeneration (combined heat and power) unit.	
PGE EJ 1 (SPV of PGE, ENEA, KGHM Polska Miedź and TAURON Polska Energia)	Partially state-owned (the State Treasury being the dominant entity)	Construction of a nuclear power plant in Lubiatowo-Kopalino/Żarnowiec Est. net value: <b>PLN 40 billion</b>	≈3000 MWe	-	Nuclear power	2030	general contractor is expected to be chosen before the end of 2019	The project has been frequently delayed in the past. However, the current government expressed a desire to continue the nuclear power programme. The decision is expected to be made before 2018.  The exact capacity of the plant, its location and the project	most likely Polish

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								deadline have not been agreed yet.	
PGE Energia Odnawialna (PGE Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of the Baltica offshore wind farm Est. net value: <b>PLN 7 billion</b>	1050 MWe	-	Wind power	the construction works are expected to start in 2020	-	The project is at the stage of environmental researches. In July 2017 tender for a biometric campaign was settled.  While the government seems not to support inland wind farms and the new legislation impedes investment in this area, the offshore wind farm projects may still gain governmental approval (as they do not generally arouse social and environmental objections).	most likely Polish
Polenergia (Kulczyk Investments group)	Private	Construction of the "North" Power Station in Pelplin Est. net value: <b>PLN 10 billion</b>	up to 2000 MWe (2x 800-MWe)	-	Hard coal	2020	-	The investor has chosen the general contractor of the plant (Alstom), concluded grid connection agreement and hard coal purchase agreement. However, the project has been stalled after the building permit was revoked. Investor analyses different	The initial tender procedure has been conducted both in Polish and English (with the Polish version prevailing in case of any discrepancies)

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								scenarios for the North Power Station, including the sale of the entire project.	
Polenergia (Kulczyk Investments group)	Private	Construction of the offshore wind farms "Baltic II" and "Baltic III" Est. net value: <b>PLN 10 billion</b>	Up to 1200 MWe (2 wind farms of 600 MWe generation capacity each)	-	Wind power	Baltic III - 2025 Baltic II - 2026	-	The environmental decision for the Baltic III and Baltic II have been issued While the government seems not to support inland wind farms and the new legislation impedes investment in this area, the offshore wind farm projects may still gain governmental approval (as they do not generally arouse social and environmental objections).  However, it should be noted that Baltic II and Baltic III projects may be seen as competitive to the abovementioned PGE's (a partially state-owned company) Baltica project.	Most likely Polish and/or English
Elektrownia Puławy Sp. z o.o.	Partially state-owned the State	Construction of the coal-fired power unit.	90 MWe	240 MWt	hard coal	-		The investor has cancelled the contract	Polish

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(Grupa Group)	Azoty	Treasury being a major shareholder of Grupa Azoty S.A.)							<p>award procedure (for the gas variant).</p> <p>On March 31, 2017, the Supervisory Board of the Company authorized Management Board to conduct activities related to the preparation for the investment project consisting in the construction of a coal-fired power unit.</p> <p>The investor has opened a tender procedure in order to choose a technical advisor for the project.</p> <p>Ramboll has recently been chosen as the technical advisor for the project.</p>	
Tauron/ Azoty S. A.	Grupa	Partially state-owned (the State Treasury holding significant amount of shares in TAURON) Partially state-owned (the State	Construction of a coal gasification installation in Kędzierzyn Koźle <i>Est.net.val:</i> EUR 400-600 million	-	-	-	2021-2022	-	<p>On 20<sup>th</sup> April 2017 Tauron and Grupa Azoty S. A. signed letter of intent</p> <p>In October 2017 Investor received pre-FEED documentation.</p>	Most likely Polish

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	Treasury being a major shareholder of Grupa Azoty S.A.)								
PGE Górnictwo i Energetyka Konwencjonalna (PGE Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of the coal-fired power unit in Dolna Odra Power Plant <i>Est. net value</i> : PLN 3 – 3.5 billion	500 MW	-	hard coal	2026	Unknown	The Ministry of Energy intends to enhance investment in the “clean coal” power units. However, the gasification of coal technology has not been implemented for industrial purposes in Poland yet.  Thus, the concept has changed after recommendation of investment committee. A hard coal unit is planned be built.	Most likely Polish
Grupa Enea and LW Bogdanka S.A.	Partially state-owned (the State Treasury being the dominant entity)	Construction of the gasified coal-fired power plant in Łęczna	300-500 MW	-	gasified coal	2025	Unknown	The Ministry of Energy intends to enhance investment in the “clean coal” power units. The gasification of coal technology has not been implemented for industrial purposes in Poland yet.  The feasibility study of the project should be	Most likely Polish

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								ready till the end of 2017	
Eneris Energia	Private	<i>Ekologiczne Centrum Odzysku</i> CHP plant in Ruda Śląska	13 MWe	75 MWt	Sludge, waste	2020	-	Environmental decision was issued on 15 May 2017	-
ENEA Elektrownia Połaniec (ENEA Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of the refuse-derived fuel fired boiler Total est. val.: PLN 1,3 billion	225 MW	-	refuse-derived fuel	unknown	unknown	The investor intends to build an alternative (RDF) fuel boiler connected to the steam turbine power unit in Połaniec Power Plant. Alternative fuel will reduce carbon consumption and CO2 emissions by more than 50%.	Most likely Polish
ENEA Elektrownia Połaniec (ENEA Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of a hybrid RES installation in Połaniec Power Plant Total est. val.: PLN 190 million	Hybrid installation would contain: • existing biomass unit in Połaniec <b>205 MW</b> • Wind Farm Bogoria municipality <b>20 – 30MW</b> • Biogas power plant –Tuczępy Municipality <b>3 – 10MW</b>	-	biomass, biogas, wind and solar	unknown	unknown	The investor plans to build various RES installations connected with each other.	Most likely Polish

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			• Solar farm Bogoria municipality <b>1.5 – 4.5MW</b>						
PGE Górnictwo i Energetyka Konwencjonalna (PGE Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of the lignite-fired power plant and coal mine in Gubin  Total est. val: PLN 34 billion	3000 MW		lignite	2020-2030	----	The investor intends to obtain mining concession in 2017.  The project is dependent on the future regulatory and environmental framework, which may not be favourable to large lignite-fired units.	Most likely Polish
PGE Górnictwo i Energetyka Konwencjonalna S.A. – Oddział Elektrociepłownia Lublin Wrotków (PGE Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of a 29 MWt and 45 MWe biomass-fired power unit in Lublin  Total est. val: unknown yet	29 MWt and 45 MWe		Straw and wood chips			The environmental decision was issued on 18th July 2017. The Environmental Permit is a first step which will enable other activities in preparation of the investment. The economic analysis would determine the future of the project.	
PGNiG Termika S.A. or SPV created by PGNiG Termika S.A. (PGNiG Group)	Partially state-owned (the State Treasury being the dominant entity)	Construction of a 75 MWe / 140 MWt (multi-fuel) cogeneration unit fired on a mix of RDF, biomass and coal.  Total est. val.: c.a. PLN 800 mln	75 MW		RDF, biomass and coal				Most likely Polish

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PGE Grupa Energetyczna S.A. (PGE Group)	Polska	Partially state-owned (the State Treasury being the dominant entity)	Construction of three wind farms of a *90 MW in total. Project "Klaster" contains wind farms: Starza - 44 MW, Rybice - 22 MW Karnice II- 24 MW	90 MW		Wind power		14 November 2017 (deadline for submitting the requests to participate in the tender procedure)	The investor will invite five contractors who comply with the participation criteria to submit initial tenders at the later stage of the tender procedure.	Polish

## Get in touch

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