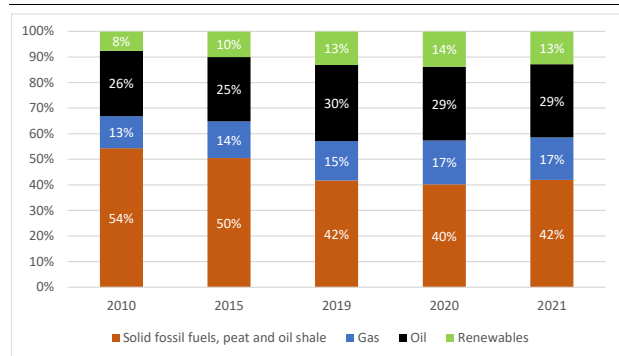


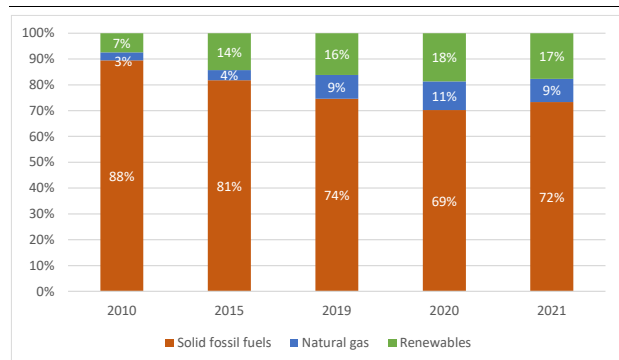
Key energy figures

Graph 1: Energy mix



Source: Eurostat

Graph 2: Electricity mix



Source: Eurostat

Saving energy

1. Key energy savings measures

Poland has taken several measures to decrease energy consumption and promote energy efficiency:

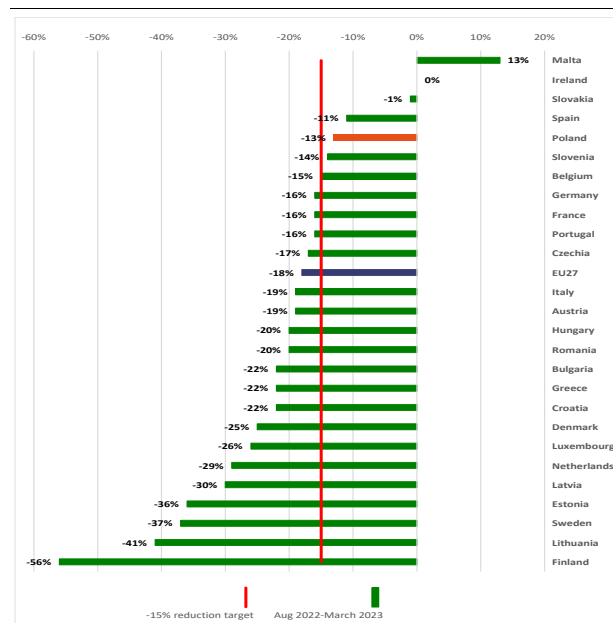
- On 15 July 2022, the **clean air plus programme** was launched giving up to a 90% subsidy to households **for thermal modernisation; replacing outdated heating boilers**, including district heating connections.
- Moreover, as of 3rd January 2023, the government has **increased the funding for thermal modernisation of houses and heat sources replacement**.
- Other measures to promote energy savings include **extending the white certificate scheme to the transport sector**, a programme supporting energy efficiency in

businesses using energy performance contracts; and developing an energy savings registry.

2. Gas Demand Reduction

Poland has reduced its gas consumption by **13%** in the period **August 2022-March 2023**, below the decrease of EU consumption (18%) and the 15% voluntary gas demand reduction agreed at the EU level ⁽¹⁾.

Graph 3: Natural gas demand reduction (August 2022-March 2023)



(1) Cyprus does not use natural gas

Source: Eurostat, DG ENER calculations

Diversification of energy supplies

1. Key actions

Since 2014, Poland had already significantly reduced its exposure to Russian gas through strategic investments aimed at diversifying gas supply routes.

Its **import dependency on Russian gas** has been decreasing in the last decade, from around 76% in 2014 to **55% in 2021** (equalling 10 bcm).

⁽¹⁾ Regulation (EU) 2022/1369 of the Council of 5 August 2022.

Gazprom no longer supplies Poland with natural gas as of 28 April 2022, by unilateral decision, following Poland's refusal to pay for gas supplies in roubles.

2. Gas Infrastructure Developments

The **LNG terminal in Świnoujście**, opened in 2016, has a maximum regasification capacity of 5 bcm (54.4 TWh) per year. Poland plans to expand this LNG terminal from 6.2 bcm/year to 8.3 bcm/year in 2023.

Key infrastructure projects have been completed and became operational in 2022, including the **interconnector with Lithuania**, the **Baltic Pipe**, and the **interconnector with Slovakia**. These projects became operational in November 2022 and their completion gave Poland enough import capacity to entirely replace lost imports from Russia. In particular, the Baltic Pipe allows transporting up to 10 bcm/year of gas from the Norwegian shelf through Denmark and the Baltic Sea to Poland. Additionally, Poland plans to open a **Floating Storage and Regasification Unit on the Baltic Sea** near Gdansk in 2026, with an expected capacity of 6bcm of gas per year.

Map 1: **LNG terminals and cross-border interconnections**



Source: DG ENER

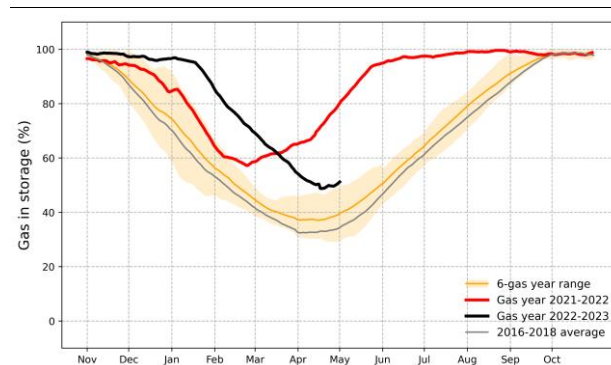
3. Gas Storage

Poland's total storage capacity (3.73 bcm) is relatively small compared to its annual consumption of around 20 bcm/year. GSP, the owner and operator of Poland's seven gas storage

facilities⁽²⁾, is considering further expanding the total capacity.

Poland fulfilled its gas storage obligations last winter, reaching 98.91% by 1 November⁽³⁾, and ended the heating season with its gas storage filled at 51.18% on 2 May, 2023.

Graph 4: **Storage levels in Poland**



Source: JRC calculation based on AGSI+ Transparency Platform, 2022

Energy Platform

Regional Group of reference: Central and Eastern Europe

National companies participating to the Industrial Advisory Group: Polski Koncern Naftowy Orlen S.A. (PKN Orlen S.A.)

On Wednesday, May 10, the European Union launched its first international tender for joint gas purchases. A total of 25 international suppliers and more than 110 companies have decided to participate and intend to purchase 11.6 billion cubic meters of gas. Deliveries are expected to take place between June 2023 and May 2024.

⁽²⁾ UGS Wierchowice, VGS GIM Kawerna (Kosakowo, Mogilno) and VGS GIM Sanok (Brzeznicza, Husow, Strachocina, Swarzew).

⁽³⁾ Regulation (EU) 2022/1032 of the European Parliament and of the Council of 29 June 2022 amending Regulations (EU) 2017/1938 and (EC) No 715/2009 with regard to gas storage.

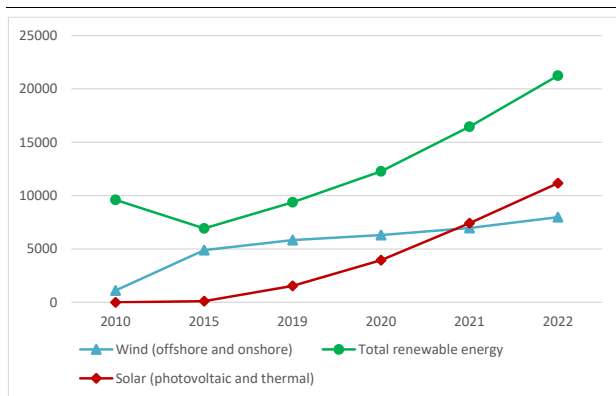
Accelerating clean energy

1. Installed Renewable Capacity

In **2022**, Poland installed around 4.7 GW of renewable capacity, bringing the total to **21.2 GW**.

In **2022**, the annual growth rate of installed renewables power capacity was **29%**, compared to 34% in 2021.

Graph 5: Installed solar and wind power capacity (in megawatt)

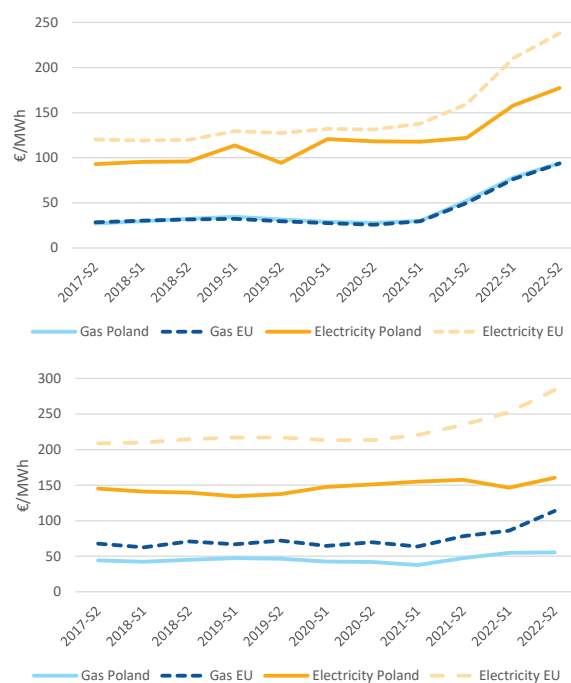


- (1) The renewable power capacity data reflects the capacity installed and connected at the end of the calendar year.
- (2) In 2022, Poland installed **1 GW** of **wind power** capacity (vs. 0.6 GW in 2021)
- (3) In 2022, Poland installed **3.7 GW** of **solar power** capacity (vs. 3.4 GW in 2021)

Source: IRENA, RE Capacity statistics, 2023

Energy price developments

Graph 6: Poland's energy retail prices for industry (top) and households (bottom)



- (1) On electricity, the band consumption is for DC households and ID for industry
- (2) On gas, the band consumption is D2 for households and I4 for industry

Source: Eurostat

Recovery and Resilience Plan (RRP)

- **EUR 22.52 billion in grants** (updated, representing approximately 3.9% of 2021 GDP). **EUR 34.5 billion in loans**
- **Adoption date by Council: 17 June 2022.**
- Before the first payment request and before any payment can be made from the RRF, Poland must comply with milestones supporting the effective protection of the Union's financial interests.
- **Annual RRF event with stakeholders:** no annual event organised yet.
- **Climate target:** 42.7%