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NOTE

From:	General Secretariat of the Council
To:	Delegations
Subject:	Presentation by Business & Science Poland (agenda item 2.) at the Working Party on Competitiveness and Growth (Industry) on 23 June 2025

Delegations will find attached a presentation by Business & Science Poland, with a view to the discussion by the Working Party on Competitiveness and Growth (Industry) at its meeting on 23 June 2025.

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23.06.2025 Brussels, Belgium
Working Party on Competitiveness and
Growth of the Council of the European Union



Gap between high- and low-income EU member states in accessible for innovative companies financing.

General knowledge/awareness and investor education.

Larger public equity programmes.

Market access to innovative products.

IP regulations.

Taxation.

Support for dual-use innovations.

Legal systems adjustment aimed at protection of private property rights.

POLISH OFFSHORE WIND PERSPECTIVE, CASE FOR SUPPLY CHAIN INDUSTRIAL STRATEGY

Building Europe's clean tech backbone in the Baltic region

Presentation
Brussels, 22 June 2025

Maciej Mierzwiński

1

Offshore wind as European project

2

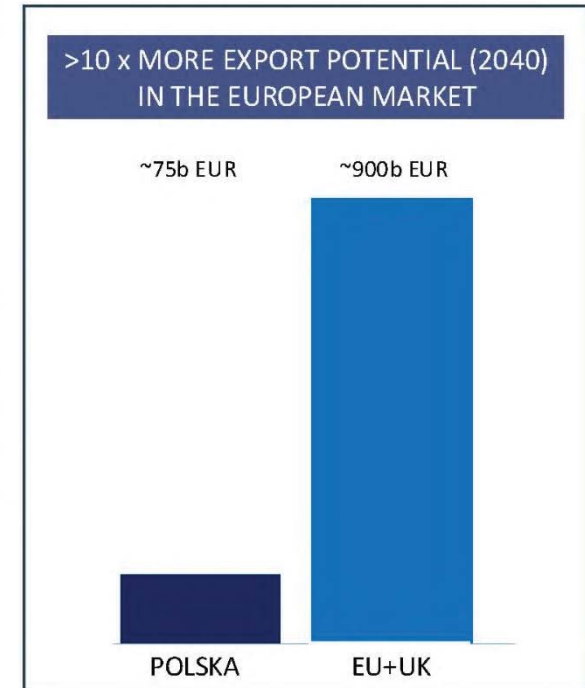
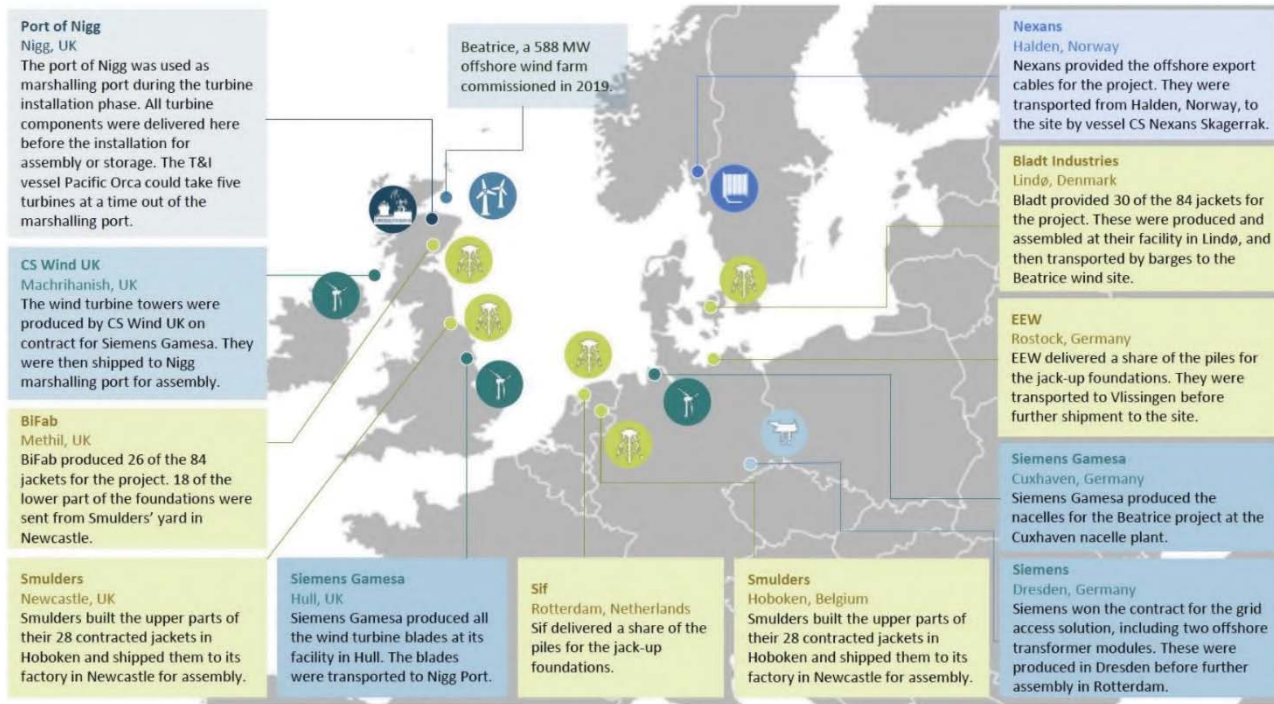
GP Baltic – past and future

3

Poland's offshore wind strategy - process and looking forward



OFFSHORE WIND IS A MULTIDISCIPLINARY AND STILL EUROPEAN PROJECT



HUGE INVESTMENTS IN EUROPE ARE ALREADY BEING MADE

Recent European wind supply chain investments



Turbine factories

Hubs, nacelles, blades and towers



Offshore turbine foundation factories

In Cuxhaven, Esbjerg, Rotterdam and Teesside



Grid equipment factories

In Aalborg, Bad Honnef, Berlin, Cadiz, Nuremberg, Rostock, Vaasa and Wollsdorf



Cable factories

In Cambois, Corinth, Eemshaven, Gron, Halden, Karlskrona, Nigg and Pikkala, Pozzuoli

Wind⁺
EUROPE



1

Offshore wind as European project

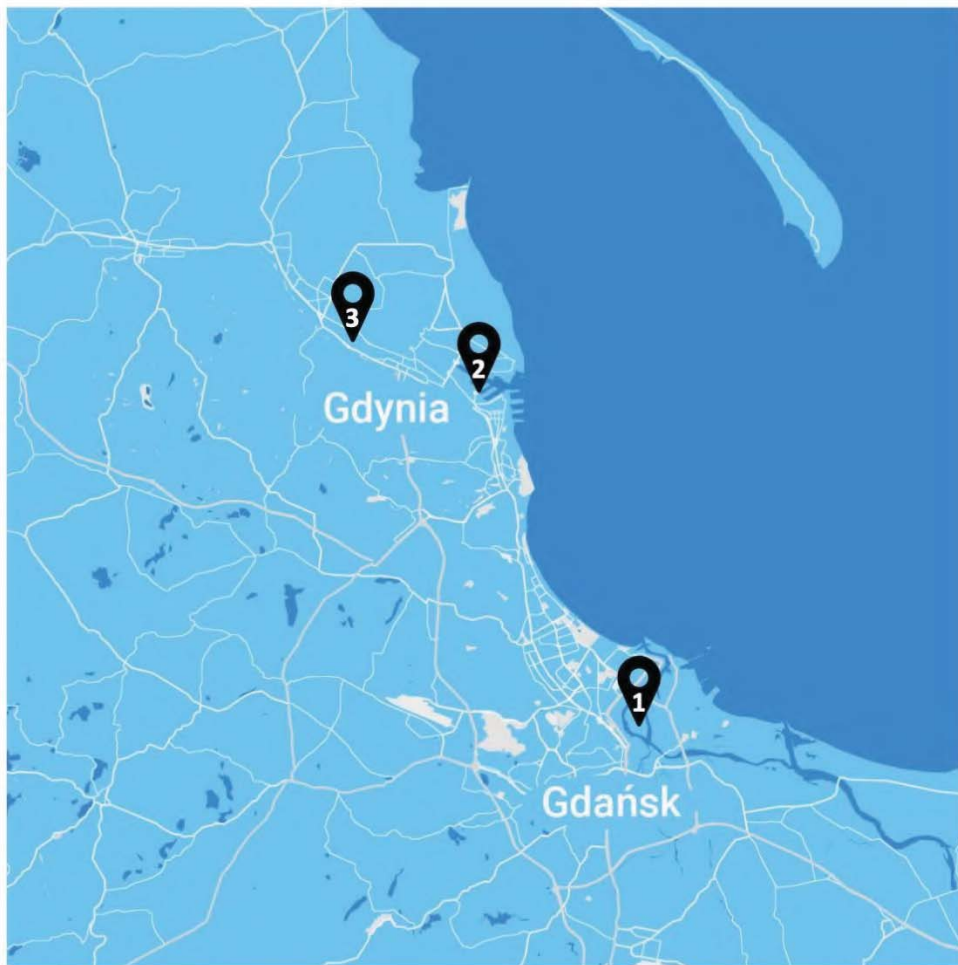
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GP Baltic – past and future

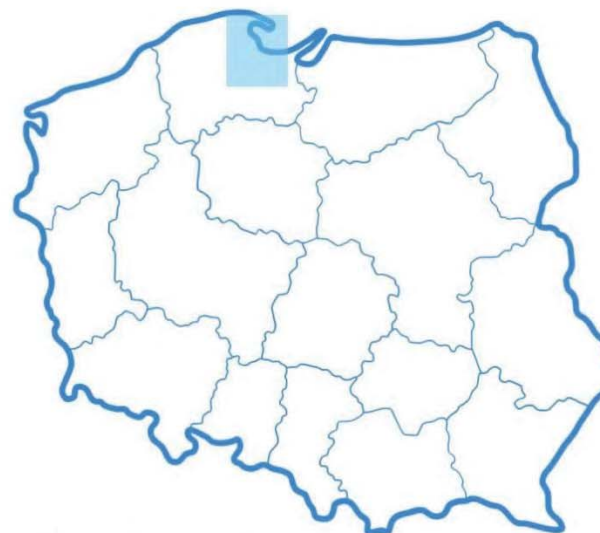
3

Poland's offshore wind strategy - process and looking forward





OUR **LOCATIONS** IN POLAND



- 1) Wyspa Ostrów, Gdańsk
- 2) Kadłubowców 12, Gdynia
- 3) Handlowa 19, Gdynia



HONORING A LEGACY, BUILDING THE FUTURE

- We build on the rich **LEGACY** of Polish shipbuilding that dates back to the 19th century
- we are heirs of a tradition of Polish **SOLIDARITY** movement that defined the workers of the Gdańsk Shipyard and Polish society.
- Today we look to the **FUTURE** creating a national industrial leader, pioneering innovative solutions, and laying the industrial foundations for Poland's energy transformation.



GRUPA PRZEMYSŁOWA BALTIC AT A GLANCE

Grupa
Przemysłowa
baltic 

1,000 

completed turnkey projects
since 1947

4,500 

onshore tower sections delivered since 2012

20 

years of experience in
manufacturing
substations and
complete oil & gas
process modules

900 

experts
employed in
the holding
companies

Delivering onshore
structures since
1953, with offshore
experience since
2000

LOCATION - WYSPA OSTRÓW, GDAŃSK

Grupa
Przemysłowa
baltic

STORAGE
AREA

PAINTING
PLANT

K1 HALL
THE BIGGEST FABRICATION HALL
IN CEE (331 X 211 M)

WAREHOUSE &
STORAGE AREA

THE BIGGEST FABRICATION GROUP IN
CEE – 65 000 M²

ANNUAL STEEL PROCESSING CAPACITY
TO 100 000 TONS

BLASTING AND PAINTING LINES WITH
BLASTING, METALIZING AND PAINTING
CHAMBERS FOR STRUCTURES UP TO
38 M LONG – 13.6H19 M

PLATES BENDING TO Ø 8M: 6KM
FROM PORT OF GDYNIA

R&D CENTER

33 HALL

PRODUCTS AND INDUSTRY



OFFSHORE ENERGY



ONSHORE ENERGY



NUCLEAR ENERGY



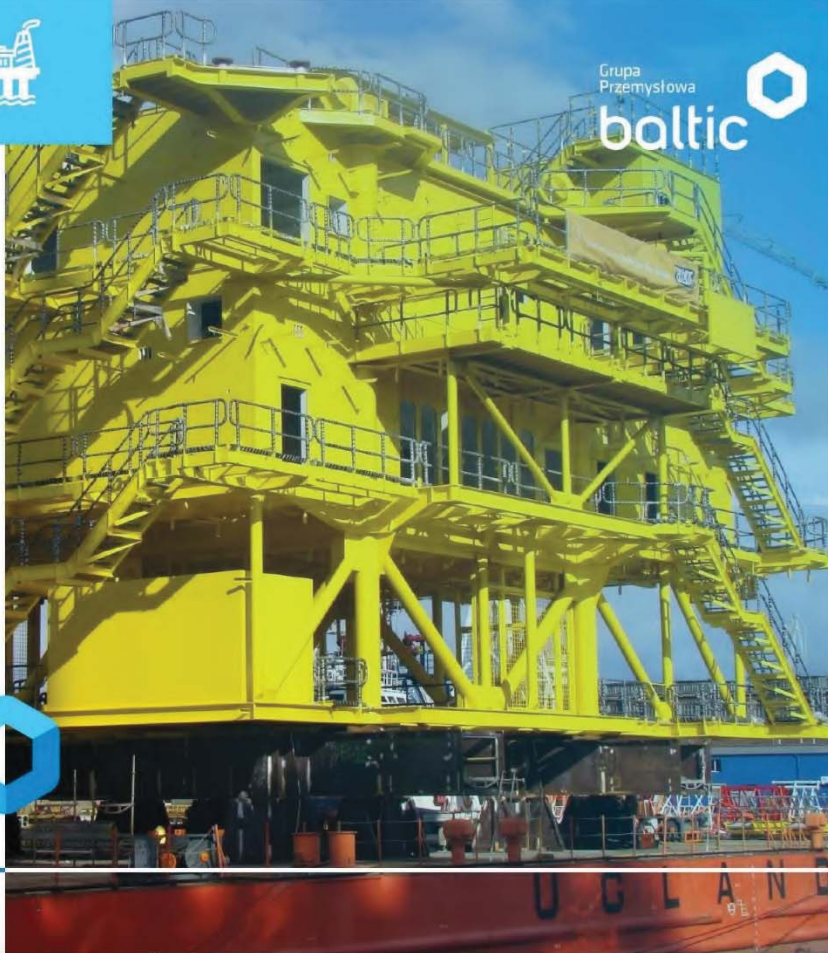
HYDROGEN



**SMART MARITIME
SOLUTIONS**



Grupa
Przemysłowa
baltic



Grupa
Przemysłowa
baltic



GP BALTIC OWNER INVESTS FURTHER IN THE SUPPLY CHAIN

We are shaping a **stable future** for the next generations by harnessing the potential of offshore wind energy

We manufacture towers for offshore wind turbines that serves as the base of investments in renewable energy sources, thereby solidifying our position as a pioneer in the offshore wind energy sector in Poland. Our work is not just a business activity – it's about creating a project that strengthens the Polish supply chain for offshore wind energy and contributes to creating prospects for future generations.



Industrial Development Agency



The company under the direct supervision of the Ministry of State Assets, ARP JSC, aims to support the Polish industry, promoting its development and innovation.

ARP's long-term strategy is to transform its industrial asset portfolio and develop assets related to renewable energy with particular emphasis on offshore wind Energy.

Over 30 years of operation, ARP has invested over EUR 4.6 billion, creating 75,000 jobs. Investments include direct capital contributions, grants and various forms of loans.

1

Offshore wind as European project

2

GP Baltic – past and future

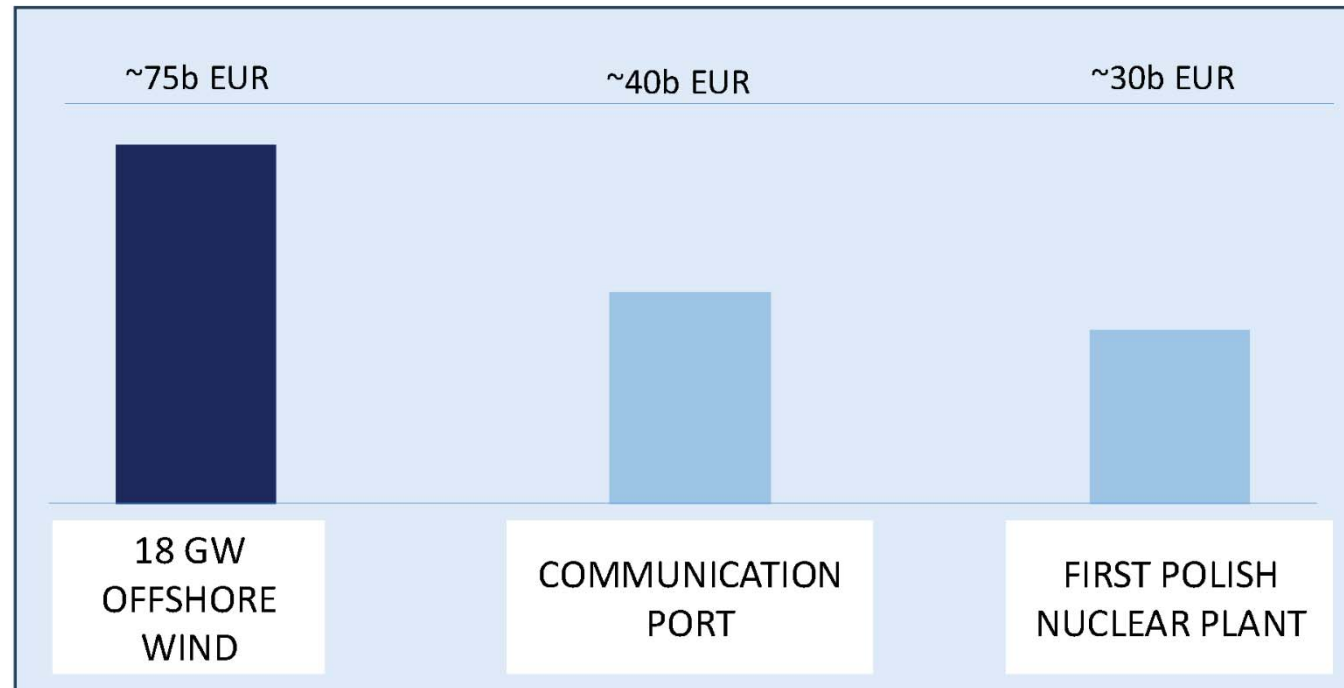
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Poland's offshore wind strategy - process and looking forward

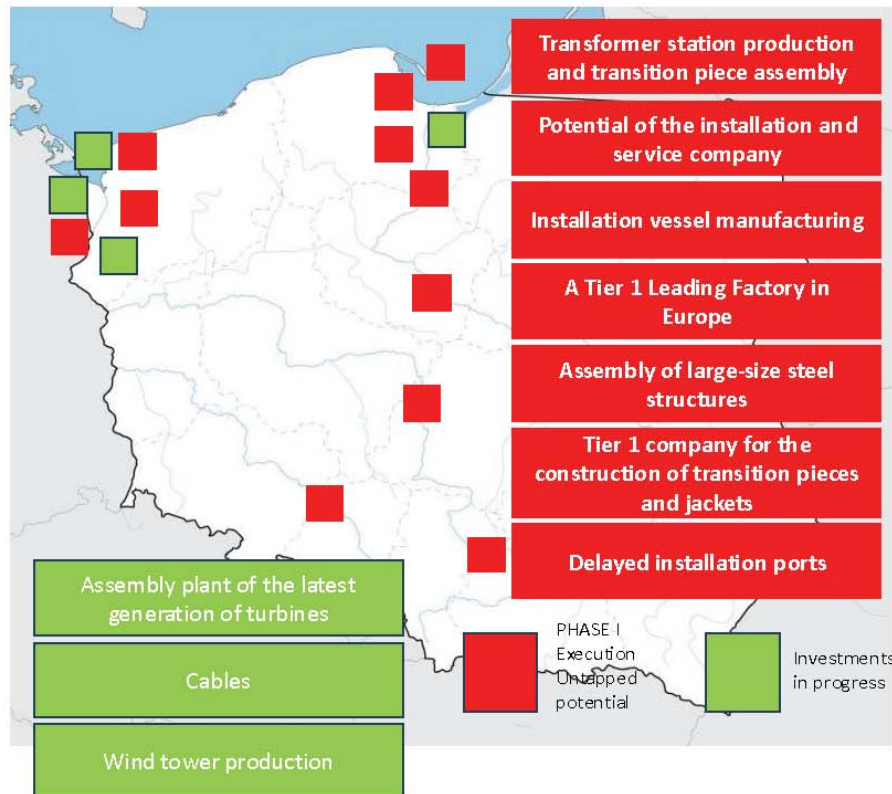


OFFSHORE WIND MEANS HUGE OUTLAYS AND REVENUE POTENTIAL FOR COMPANIES

THE CONSTRUCTION OF OFFSHORE WIND FARMS IN POLAND IS THE LARGEST INVESTMENT PROGRAM IN DECADES, ALLOWING ENTREPRENEURS TO GENERATE REVENUES OF UP TO 20 BILLION ON AVERAGE PER YEAR

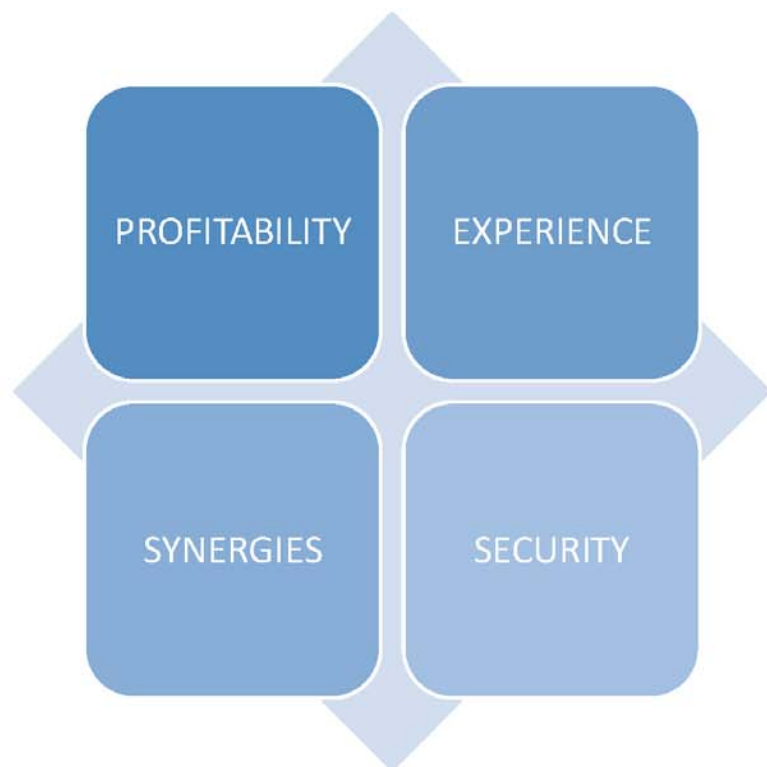


THE FIRST PHASE OF THE POLISH OFFSHORE IS VALUABLE EXPERIENCE



- **Lack of domestic companies at the Tier 1 level**, which in turn makes it impossible to engage or build the potential of lower-level suppliers.
- Developing a supply chain business requires confidence that the business will be **stable and profitable**, and that the entity will be able to provide adequate resources to invest and expand its competencies and resources.
- The **financing** (and financial security through guarantees) of contracts is in particular a significant barrier to entry into European supply chains.
- The **lack of an appropriate scale** of operations further hinders the race for human resources.
- The prevailing view among Polish companies is that **domestic farms should be a turning point for their development**. The implementation of the first contracts on Polish farms will enable us to obtain references.
- The period of preparation for the construction of the first offshore wind farms in Poland was used to **gain understanding** by Polish companies of the issue of appropriate determination of the procurement strategy.
- **Educational projects** for young people in the field of offshore wind implemented regionally are among the best in Europe.

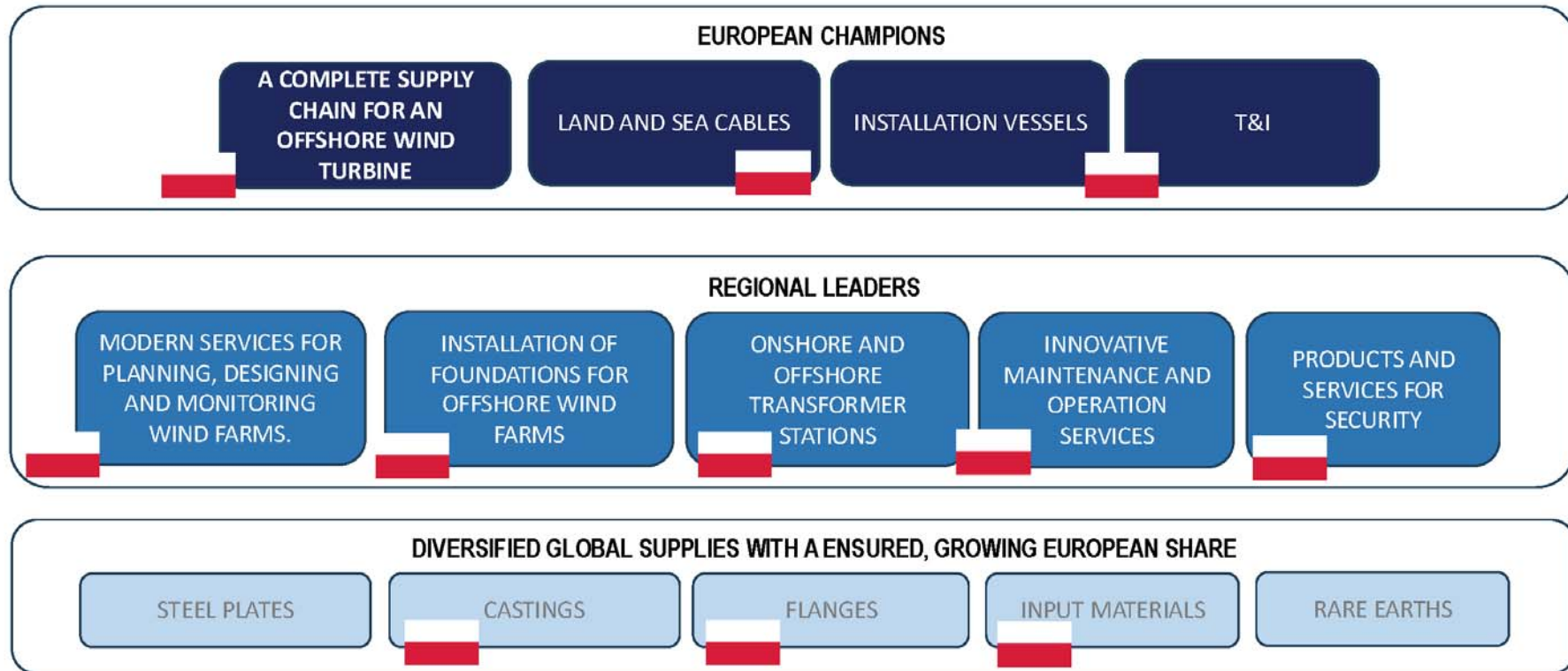
POLISH STRATEGY HAS BEEN ANALYSED THROUGH FOUR PERSPECTIVES



- Experiences of domestic enterprises. The shipbuilding and construction sectors have already demonstrated the ability to supply components. Additionally, certain investments (turbine assembly plant, wind tower factory) are practically already underway. Building a T1-T4 chain based on the experience or involvement of already existing companies should be a key criterion.
- Profitability. In certain segments, the Polish economy is particularly well-positioned - where geographic rent combined with competitive labor costs - we can ensure a long-term decline in LCOE. Some sectors (steel production) may mean important political decisions to remain competitive.
- Synergies with other sectors of the economy. Identifying sectors that will influence other - strategic sectors - or benefit from mutual experiences - will create additional value for the economy (also in the field of defense).
- Security. The focus should be on the production and provision of services in those investment and maintenance elements that constitute sensitive and critical points for the infrastructure (e.g. transformer stations).



PRIORITY IMPLEMENTATION PROGRAMS ON THE VALUE CHAIN MAP



POLAND WANTS TO SUPPORT EU-BASED TURBINE OEMs

**A WIND TURBINE IS
A COMBINATION
OF MANY
INDUSTRIAL
COMPETENCES**

POLAND HAS THE
POTENTIAL TO
SHARE UP TO 65%
OF COMPONENTS

BALTIC TOWERS,
WINDAR and
VESTAS HAVE
ALREADY
INVESTED

CASTINGS,
MECHANICAL,
ELECTRICAL,
HYDRAULIC
SYSTEMS

DIGITALISATION,
ARTIFICIAL
INTELLIGENCE

HIGH POTENTIAL
FOR INNOVATION



Polish offshore tower maker Baltic Towers closes EUR 140m financing

Jun 16, 2025, 11:42:32 AM | Article by [Rossitsa Vachkova](#)



Poland's Baltic Towers, the offshore wind tower factory developed by the Industrial Development Agency (ARP) and Spain's GRI Renewable Industries, has closed a EUR 140 million (USD 160m) project financing with a consortium of institutions.

The sponsors include Poland's National Fund for Environmental Protection and Water Management, Japan's financial institution SMBC and the Spanish

RenewablesNow

Vestas factory in Poland kicks off operation

Jan 14, 2025, 3:01:58 PM | Article by [Rossitsa Vachkova](#)



The nacelle and assembly factory of Danish wind turbine maker Vestas ([CPH:VWS](#)) in the Pomeranian province is in a start-up phase, the head office of the province said.



The first shipment of wind turbine components arrived at the Vestas factory in Szczecin, marking the start of operation at the facility built on Brdowski island, the authority said in a social media post on Friday.

The unloading was carried out using the largest crane in Europe, 115 metres long, with a capacity of up to 1,400 tonnes. In January, the company announced another four ships

Examples of actions proposed under the Priority Programme

Analysis of current production capacity and infrastructure in Poland, assessment of the potential of Polish companies in the supply chain and mapping of global supply chains.

Establishing partnerships with Vestas, Siemens Gamesa and GE Vernova, signing agreements on cooperation and building a supply chain for the long-term European market, technology transfer, support for component certification by Polish companies.

Investments in new production plants – "first wave" (blades, towers, generators, transformers), support for the development of local Tier 1 and Tier 2 suppliers, creation of financial mechanisms and tax reliefs.

Modernization of ports, construction of logistics centers and warehouses, development of transport infrastructure for large-size elements.

Investments in new production plants – "second wave" (castings, nacelle covers, control systems), support for the development of local Tier 1 and Tier 2 suppliers, creation of financial mechanisms and tax reliefs.

Participation in international research consortia in order to develop common European solutions with the role of domestic Tier 2 companies (Horizon Europe), promotion of Polish competences at fairs, building partnerships with non-European manufacturers.

THERE ARE MANY MARKET OPPORTUNITIES ON OFFSHORE WIND



**OFFSHORE WIND
VESSELS MAY
RESTART EU
SHIPBUILDING**



**FOUNDATIONS
RELY ON STEEL
INDUSTRY**



**SUBSTATIONS ARE
HEART OF WIND
FARMS**



GP Baltic, Crist, Dillinger, Balti Power

10-PACKAGE STRATEGY FOR POLAND AND EUROPE

Program package. Adoption of the Polish Strategy for the Development of the Offshore Wind Farm Industry.

Market package. Adoption of an updated Energy Strategy taking into account the overall target of 33 GW for offshore wind farms.

European package. The implementation of NZIA and other crucial laws.

Production financing package. Availability of guarantees for the implementation of the largest contracts in OWF projects in Poland and Europe.

Investment financing package. Availability of financing of investments, also related to dual-use.

Education and work package. Adoption and implementation of the Wind Energy Competence Development Program.

Investment financing package. Announcing grant or loan programs.

National security package. A Set of guidelines for the cybersecurity and physical security of key production assets.

Priority Implementation Programs. The strategy will include the launch of Priority Implementation Programmes.

Institutional package. Executive Board chaired by the Offshore Plenipotentiary.



PAN EUROPEAN SYSTEMIC SOLUTIONS FOR OFFSHORE WIND

European supply chain additional capacity requirements



PAN EUROPEAN SYSTEMIC SOLUTIONS FOR OFFSHORE WIND BASED ON POLISH EXPERIENCES

POLISH PERSPECTIVE



EU SOLUTIONS

