【欧州】【Common】【海事】

Common – Environmental Issues/Maritime Issues – Offshore wind power generation: The deployment of EU's offshore wind facilities: The Baltic Sea Energy Security Summit agrees to increase offshore wind capacity sevenfold by 2030

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【概要：Summary】

Against the backdrop of the European Green Deal's 2050 climate neutrality target and the energy crisis caused by the Russian war in Ukraine, the deployment of the EU's offshore wind capacities is becoming an even more crucial tool for securing the EU's energy supply while meeting its climate targets. In fact, the energy crisis, which followed the sanctions against Russia due to its invasion in Ukraine has added a political urgency to the environmental necessity to rapidly replace fossil fuels with renewable energy. The EU is determined to reduce as quickly as possible the energy dependency on Russia. However, this will require a decisive restructuring of the EU's energy system, based on renewable energy sources and in particular the massive expansion of wind power generation, offshore and onshore.

The North Seas region is the leading region in Europe for offshore wind power generation, but to meet the climate neutrality target and energy security target, the construction of offshore wind farms will have to be decisively accelerated in quantity, size, and power capacity. At the North Sea Summit in Esbjerg in May 2022, heads of governments from Germany, Belgium, the Netherlands, and Denmark took a decisive step by co-signing a joint declaration to increase the North Sea's offshore wind capacity to 150 GW offshore wind by 2050. Following the North Sea Summit and based on the European Commission's REPowerEU plan of 18 May 2022, also the Baltic neighbouring states are determined to making Europe independent of Russian energy and to strengthen their energy cooperation and energy resilience to end their dependency on Russian fossil fuels while contributing to climate neutrality in the EU.

At the Baltic Sea Energy Security Summit on 30 August 2022, the Baltic Sea neighbouring states signed the Marienborg Declaration to accelerate the expansion of offshore wind facilities and the development of green energy also in the Baltic Sea region. Under the Marienborg Declaration, the Baltic Sea neighbouring states commit to expand the offshore wind capacity in the Baltic Sea sevenfold by 2030, from currently less than 3 GW wind power capacity to nearly 20 GW capacity by 2030 and to reaching up to 93 GW by 2050. The states also agreed to pursue faster permitting processes to reach this target.

【記事：Article】

1. The European Green Deal and the Russian war's impact on the EU's offshore wind power planning

The European Green Deal (COM (2019) 640 final) includes the EU's long-term plan to achieve climate neutrality and net-zero GHG emissions by 2050. To achieve this target, the EU will have to significantly increase the utilisation of renewable energies in its energy mix. However, in the past years, the availability of relatively cheap Russian oil and natural gas to the EU has also hampered efforts to achieve a quick shift towards renewable energies. The EU imports 90% of its gas, out of which Russia provides around 45% and Russia also supplies around 27% of oil imports and 46% of the EU's coal imports (European Commission 2022a, COM/2022/108 final).

However meanwhile, the dependence on Russian fossil fuels has become a liability and the high amounts paid by some of the European Member States for Russian fossil fuels, almost €100 billion per year, are seen as payments for the Russian war against Ukraine (European Commission 2022b). In this respect, the Russian war in the Ukraine has changed fundamentally and irrevocably the geopolitical reality and the EU Member States' view on their dependence on Russian fossil fuels. It has added a political and strategical urgency to achieve the transition towards renewable energies. While the Green Deal was not originally prepared as a peace- and security-building instrument, the Ukraine conflict has shown the interdependencies between achieving the Green Deal's target of carbon neutrality and at the need to become independent from Russian fossil fuel imports (European Council 2022a, European Council 2022a).

On 8 March 2022, the European Commission presented its first outline of the REPowerEU Plan to make the EU independent from Russian fossil fuels before 2030. Thereafter, at the European Council on 24-25 March 2022, the EU's heads of state and government asked the European Commission to elaborate a detailed REPowerEU Plan. On 18 May 2022, the European Commission presented a detailed REPowerEU Plan (COM (2022) 230 final), the "Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions. REPowerEU Plan {SWD(2022) 230 final}" (COM(2022) 230 final). The REPowerEU Plan (COM (2022) 230 final) highlights the importance of diversification of energy imports and also points out the role of offshore wind power generation in the envisaged energy transition and considers how to reduce and substitute fossil fuels in the transport sector.

Wind power comes as a clean, free, and abundant energy source for generating electricity. Besides the onshore wind energy exploitation, the offshore wind energy production is considered being one of the key renewable energy sources to cover the future energy demand. According to the European Commission's European Green Deal, "…increasing offshore wind production will be essential, building on regional cooperation between Member States" (COM (2019) 640 final). The deployment of offshore wind energy is at the core of delivering on the European Green Deal's target. The EU's offshore wind energy locations are mainly the North Sea and the Baltic Sea, but also locations in the Mediterranean Sea, Black Sea, Atlantic Ocean are suitable for installing offshore wind parks and several European developers are working also on floating offshore wind turbines. Multiple pilot projects are already up and running, with deployment expected to accelerate towards the end of this decade (European Commission n.d.b). The installed offshore wind capacity in the EU was 14.6 GW in 2021 and is set to increase by at least 25 times by 2030, using the vast potential of the 5 EU sea basins. In contrast to onshore wind parks, the EU's offshore wind power generation has benefits

from the utilisation of the stronger and steadier winds at sea and less space restrictions, as in case of onshore wind farms (European Commission 2021a). The European Commission estimates that between 240 and 450 GW of offshore wind power is needed by 2050 (European Commission n.d.a). The EU strategy on offshore renewable energy and follow-up actions (COM(2020) 741 final) contains suggestions regarding the investment, regional cooperation, predictable legal framework, and measures to strengthen the supply chains and to support continuous innovation (COM(2020) 741 final). The strategy also promotes regional cooperation, including cross-border cooperation in the North Sea, Baltic Sea, Mediterranean Sea, Black Sea, Atlantic Ocean, and outermost regions and overseas territories.

2. The North Sea Energy Cooperation and the Baltic Energy Market Interconnection Plan to fully deploy offshore wind in the North Sea and the Baltic Sea

Regarding offshore wind energy potential, mainly all North Sea and partially also Baltic Sea areas are very suitable areas with high potential for offshore wind power generation (COM(2022) 230 final). The North Sea has a high and widespread natural potential for offshore wind energy and is currently the leading region for deployed capacity in offshore wind (COM (2020) 741 final). However, also the Baltic Sea, the EU's Atlantic Ocean as well as the Black Sea offer a good natural potential for both, offshore bottom-fixed and floating wind energy. The Mediterranean Sea shows potential for floating offshore wind energy (COM (2020) 741 final). The utilisation of floating offshore wind farms in deeper waters would allow an expansion of the utilisation of the up to 80% of offshore wind resources in deep water areas, which cannot be utilised by conventional bottom fixed structures (European Commission 2021c). The aim is to install 350 MW of floating capacity in European waters by 2024 (European Commission 2021b). To harness the full potential of offshore wind in the North Sea and the Baltic Sea, the EU is part of the North Sea Energy Cooperation (NSEC) and the Baltic Energy Market Interconnection Plan (European Commission n.d.b). The NSEC supports and facilitates the development of the offshore grid development and the large renewable energy potential in the region. This is a long-standing energy priority for the EU and the concerned countries. Since the withdrawal of the UK from the EU on 31 January 2020, the NSEC members include Belgium, Denmark, France, Germany, Ireland, Luxembourg, the Netherlands, Norway, Sweden, and the European Commission. The work programme for 2020-2023 emphasises the development of concrete cross-border offshore wind and grid projects (hybrid projects), with the potential to reduce costs and space of offshore developments. In July 2020, the NSEC issued a joint statement calling for a European enabling framework for offshore wind energy (NSEC 2020a). The framework should consider how to tackle existing barriers for an accelerated development of cross-border hybrid offshore wind energy projects in the North Sea, but also include guidance to EU Member States on how to implement projects, adequate electricity market arrangements and efficient EU financing. The NSEC's renewed Political Declaration underlines the political intent of the countries participating in the NSEC. The NSCE members also intend to deepen their cooperation to meet the ambitious offshore wind 2030 and 2050 target. They also considered the required investments into the offshore wind sector, and the need to cost-efficiently integrate offshore wind energy into the existing and future energy systems, as well as the need for a concrete NSEC work programme (NSEC 2021). Another important objective is to cooperate on maritime spatial plans, including wind energy deployment and grid development, including the cross-border networks (NSEC 2021). Regarding the 2020-2023 work

programme, the participating countries acknowledge the progress and deliverables made by the Support Groups of the North Seas Energy Cooperation (2016-2019) and call for taking forward the work carried out and to further promote offshore wind, the development of offshore grids, and system integration, among others (NSEC 2020b).

On 18 May 2022, the states bordering the North Sea underlined their common ambitions at the North Sea Summit in Denmark, signing the Summit Declaration of Esbjerg, which also includes joint offshore projects (The Press and Information Office of the Federal Government 2022). At the Summit, the four countries Belgium, Denmark, Germany, and the Netherlands pledged to pursue a tenfold rise in the installed wind capacity in the North Sea by 2050 coupled with ambitious targets for green hydrogen production (The Press and Information Office 2022). The four Member States agreed to reach at least 65 GW of offshore capacity by the end of the decade and then reach at least 150 GW by 2050 (The Press and Information Office 2022). Such a capacity would amount to 15,000-20,000 wind turbines, based on the most powerful ones currently on the market. As part of the cross-border cooperation, Denmark will establish an energy island in the North Sea with an initial capacity of 3GW of offshore wind by 2033 and connections to its mainland and Belgium. They will also support the work of the Baltic Energy Market Interconnection Plan (BEMIP) and other efforts to promote offshore wind (THE DECLARATION OF ENERGY MINISTERS 2022).

3. The Baltic Energy Market Interconnection Plan (BEMIP)

Regarding the development of the offshore wind energy in the Baltic Sea, the Baltic energy market interconnection plan (BEMIP) with its members Denmark, Germany, Estonia, Latvia, Lithuania, Poland, Finland, Sweden, and Norway, which is participating as an observer, aims to end energy isolation in the Baltic region (European Commission n.d.d). The first Memorandum of Understanding (MoU) on the BEMIP initiative was signed on 17 June 2009 and focused on electricity and gas markets, infrastructure, and power generation (European Commission n.d.d).

The primary objective of the Baltic energy market interconnection plan (BEMIP) High-Level Group is to achieve an open and integrated regional electricity and gas market between EU Member States in the Baltic Sea region. Regarding the BEMIP's working groups and projects, dedicated working groups on infrastructure, markets, gas and electricity, security of supply, synchronisation, renewables, offshore grids, and energy efficiency, prepare specific measures, projects, and studies intend to achieving the initiative's objectives and targets. As part of the BEMIP implementation, a number of cross-border and national infrastructure projects have been completed across the Baltics to improve their integration with the Nordic electricity market (European Commission n.d.d). Further efforts are ongoing in the region to complete the synchronisation of the three Baltic States with European networks by 2025 at the latest, to increase transmission capacity in the remote Nordic area, to develop a regional gas market, and to make the most of the region's energy efficiency and renewable energy potential, both onshore and offshore. Setting offshore renewable energy has become a pan-European priority, coherent with increasing the cooperation and actions undertaken by Member States around the Baltic Sea to developing the estimated offshore wind capacity potential.

Regarding the offshore development in the Baltic Sea region, on 30 September 2020, the Energy Ministers for the 8 EU Member States in the Baltic Sea region and Commissioner Kadri Simson signed the Baltic Sea Offshore Wind Joint Declaration of Intent, committing themselves to closer cooperation on offshore wind in the Baltic Sea,

to supporting the European Green Deal's climate-neutrality target in the EU by 2050 and the Paris Agreement's target by deploying the full potential of offshore wind energy production in the Baltic Sea (European Commission 2020b). In the Baltic Sea alone, the potential for offshore wind power will be substantial, reaching up to 93 GW (European Commission 2020a).

In May 2021, a new BEMIP Action Plan was established within the BEMIP High-Level Group. The BEMIP Action Plan incorporated projects and processes implementing the European Union Strategy for the Baltic Sea Region (EUSBSR) in the area of energy.

Regarding the BEMIP Offshore Wind Work-program, which will be reviewed by 2024, the BEMIP members agree that regional cooperation for the development of the offshore wind potential in the Baltic Sea should concentrate in the area where such cooperation brings the most added value without doubling work conducted in other fora or at EU level. Therefore, the BEMIP Offshore Wind Working-Group should establish regular strong cooperation and work together with the North Seas Energy Cooperation (NSEC) (European Commission n.d.e). The BEMIP Offshore Wind Work-program records a political intent alone and does not establish any new legal commitments or replace or modify any existing legal obligations with regards to the BEMIP Member States. The aim is to facilitate the increased deployment of offshore wind generation capacities until 2050, with intermediary steps, at least, in 2035 and 2040 (European Commission n.d.e).

The synchronisation of the Baltic States with European networks should be completed by 2025 at the latest and increase transmission capacity in the remote Nordic area. The full integration of the electricity systems of the Baltic states with the rest of the EU by 2025 should make the most of the region's renewable energy potential, both onshore and offshore (European Commission 2022c).

4. The Baltic Sea Energy Security Summit: The Marienborg Declaration on the rapid expansion of offshore wind capacity

Against the backdrop of the Russian war against Ukraine, the European and global energy systems are experiencing a massive disruption in security and stability. In view of the European Commission's REPowerEU plan of 18 May 2022, the Baltic neighbouring states are determined to making Europe independent of Russian energy as soon as possible (Statsministeriet 2022). Therefore, the Baltic neighbouring states intend to strengthen their energy cooperation and energy resilience to phase out their dependency on Russian fossil fuels as soon as possible while contributing to climate neutrality in the EU (Statsministeriet 2022).

Therefore, on 30 August 2022, the Baltic Sea neighbouring states leaders including the Prime Minister of Poland, Mateusz Morawiecki, the President of Lithuania, Gitanas Nausėda, the Prime Minister of Latvia, Krišjānis Kariņš, the Prime Minister of Estonia, Kaja Kallas, and the Prime Minister of Finland, Sanna Marin, the Prime Minister of Denmark, Mette Frederiksen, as well as EU Commission President Ursula von der Leyen met for their Baltic Sea Energy Security Summit in Marienborg, Denmark. They signed the Marienborg Declaration on increasing the amount of offshore wind capacity in the Baltic Sea sevenfold the current capacity by 2030. The Baltic Sea neighbouring states have agreed to set combined ambitions for offshore wind in the Baltic Sea region and to increasing the current capacity of just under 3 GW to at least 19.6 GW by 2030. They recognise the substantial potential for offshore wind power in the Baltic Sea basin, for reaching up to 93 GW by 2050. The states also agreed to pursue faster permitting processes and strive for a balanced coexistence of economic and ecological needs (Statsministeriet 2022). Furthermore, they agreed to explore joint cross-border renewable energy projects and identify

infrastructure needs to enable the integration of renewable energy needed to ensure security of supply and affordable energy to private homes and businesses, while respecting the Member States' national energy policy priorities and their choices of energy mix (Statsministeriet 2022). The cooperation will also become an integral part of the Baltic energy market interconnection plan (BEMIP), and, where relevant, involve other regional fora, such as the Council of the Baltic Sea States (CBSS), the Nordic Council, and the North Seas Energy Cooperation (NSEC) (Statsministeriet 2022). The aim of the Baltic Sea Energy Security Summit is to jointly make the Baltic Sea region free of Russian energy and, at the same time, pave the way for a significant green transition.

Ahead of the Baltic Sea Energy Security Summit on 29 August 2022, Denmark and Germany entered into an agreement on connecting the Bornholm Energy Island to Germany, enabling the offshore wind power at this Danish energy island to be sent directly to the German electricity grid and to the rest of Europe.

European Commission President Ursula von der Leyen underlined that there are three specific points where the investment in offshore wind can be accelerated. First, by making hybrid projects a priority, which connect wind farms to more than one EU Member State, to save up to 10% of the total project costs, when planning interconnectors and offshore generation. Secondly, by making rapid progress with grid network development plans, based on common offshore commitments. And thirdly, by providing the political backing to accelerate the permitting of offshore wind power generation sites, which is one of the biggest bottlenecks (European Commission 2022c).

The EU will be making available EUR 5.6 billion from NextGenerationEU for the deployment of offshore and onshore wind in Europe (European Commission 2022d).

The Baltic Sea Energy Security Summit is an important step further towards strengthening the security cooperation in the Baltic Sea and follows the North Sea Summit in Esbjerg in May 2022, where the North Sea neighbouring countries adopted a joint declaration to accelerate the expansion of offshore wind facilities and the development of green energy in the North Sea (European Commission 2022e).

5. Conclusion

The Russian war in the Ukraine has triggered a double urgency to achieve a swift transition of the EU's energy system towards renewable energies, as it revealed the need to become independent from fossil fuel imports due to geopolitical reasons and for achieving an energy system based on renewable energies to achieve carbon neutrality in the EU by 2050, based on the European Green Deal. By diversifying the energy supplies and increasing the share of renewables, in particular wind power, the EU will be able not only to reduce and abolish its dependency on Russian fossil fuels but also to work on the transformation of its energy system towards renewable energies and climate neutrality. The development of offshore renewable energy resources will play an important role to reach the EU's decarbonisation goals.

The renewed Political Declaration of the NSEC underlines the political intent of the North Seas neighbouring countries to cooperate in the conventional development for offshore wind generation and the grids development, as well as hybrid projects,

The Marienborg Declaration signed at the Baltic Energy Security Summit intends to increase the ambition to multiply by seven the current offshore wind capacity in the Baltic Sea region and to install more offshore wind power generation facilities in the Baltic Sea to reach nearly 20 GW by 2030, up from the current about 3 GW capacity. In this context, the Baltic Sea

neighbouring states also agreed to pursue faster permitting processes to reach this target and recognise the potential for offshore wind power that could reach up to 93 GW by 2050 in the Baltic Sea basin.

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