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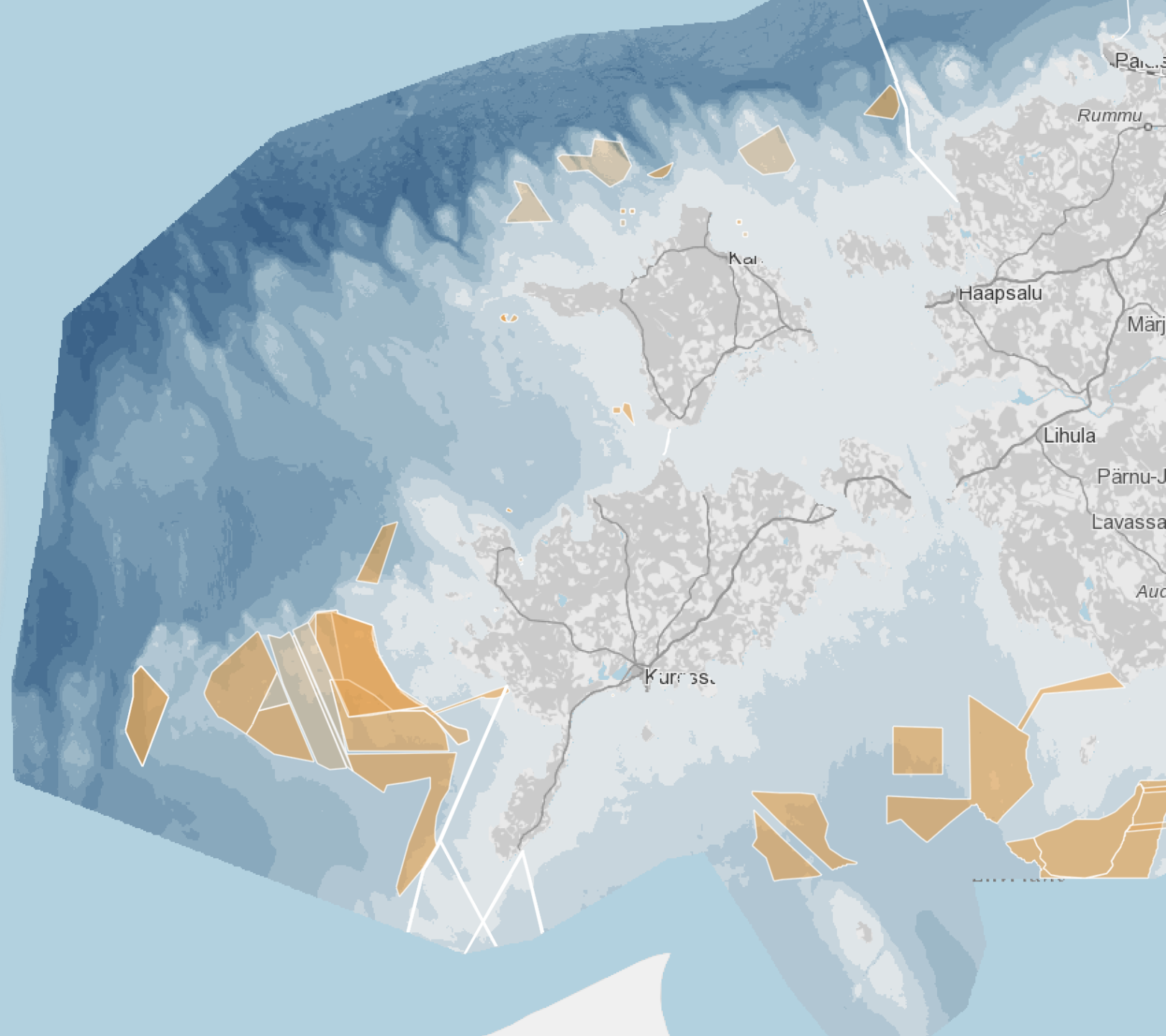
What Comes After CISAF? Supporting Estonia's Offshore Wind Future

Terje Talv, CEO, Estonian Wind Power Association

Offshore Wind Planning in Estonia

- Two valid maritime spatial plans designate **2,439 km²** suitable for offshore wind development

- Under favorable conditions, these areas could host **15–17 GW** of offshore wind capacity



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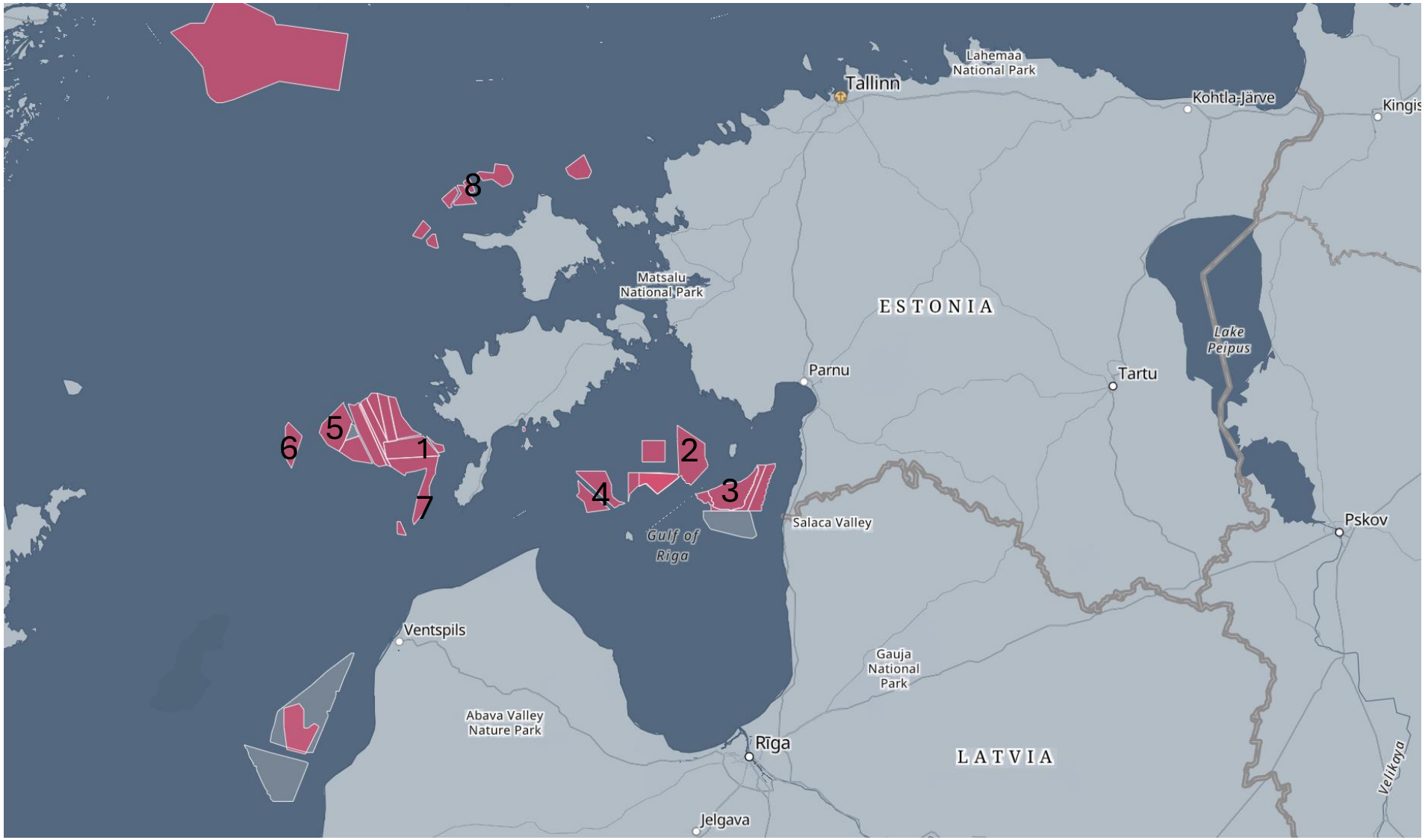

Superficies licence:
1. Saare Wind Energy

EIA Completed:
2. Utilitas Wind

EIA nearly completed:
3. Enefit Green

In process:
4. Ignitis
5. Deep Wind Offshore
6. Oxan

7. Elwind
8. Enefit Green

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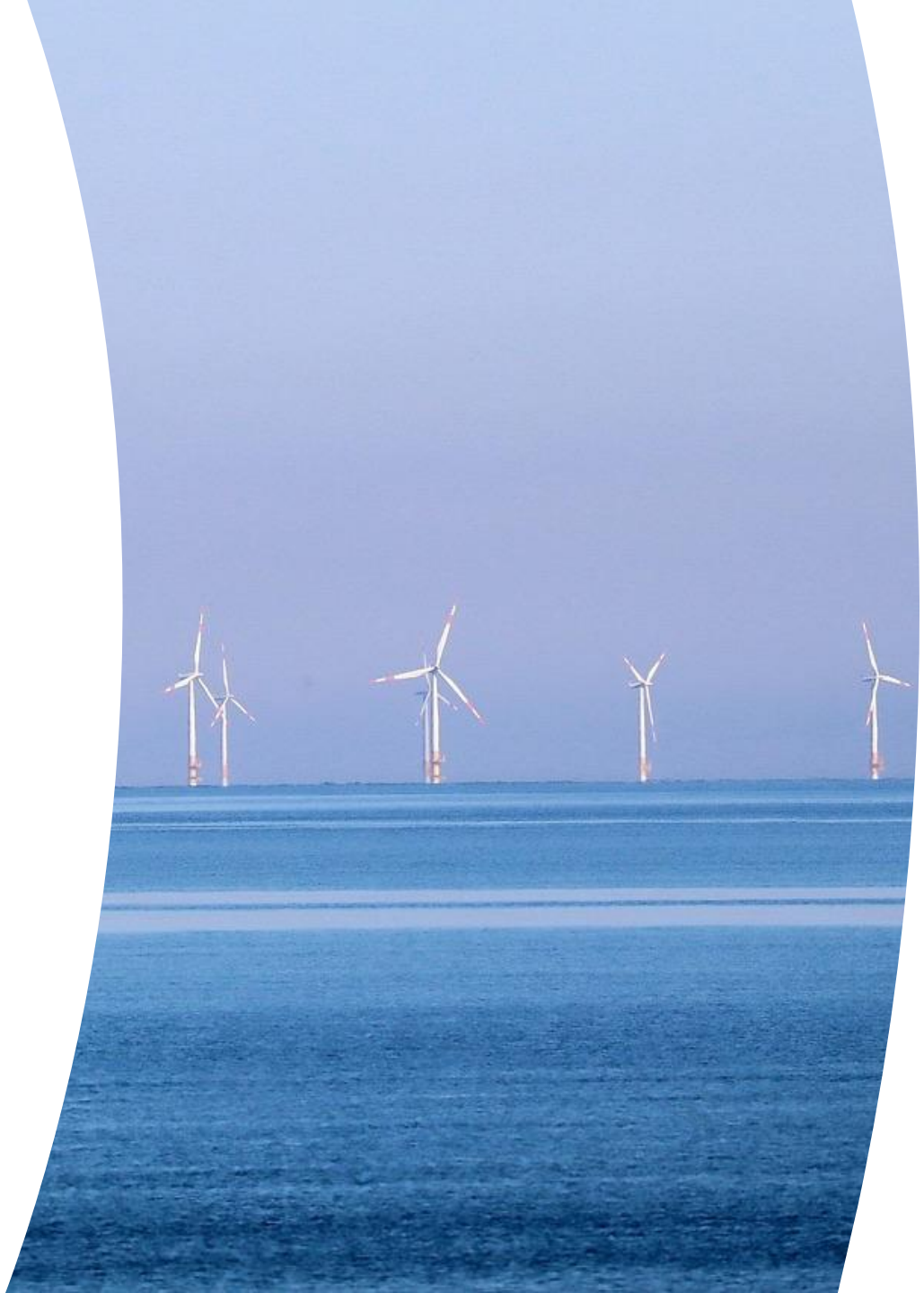
First-Wave Offshore Wind Projects



Saare Wind Energy

- Superficies licence valid
- Collaboration with Van Oord
- Planned capacity: ~1.4 GW

Utilitas Wind

- Environmental Impact Assessment completed
- Project area: Liivi Bay
- Planned capacity: ~1.0 GW

Enefit Green

- EIA nearly completed
- Former partnership with Sumitomo Corporation
- Planned capacity: ~1.0 GW (Liivi Bay project)

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Second-Wave Offshore Wind Projects

Ignitis Renewables

- In partnership with Copenhagen Infrastructure Partners (CIP)
- **Liivi Bay (Liivi 1 & 2)**
- Planned capacity: **1.0–1.5 GW**

Tuul Energy (JV)

- Joint venture of **Deep Wind Offshore, Sunly and Valorem**
- Projects under development in Gulf of Riga
- Potential capacity: **~1 GW**

Oxan Energy

- In partnership with BaltiConnect
- Saare 1 area (west of Saaremaa)
- Planned capacity: **~900 MW**

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Grid & Infrastructure

- Baltic synchronisation with the EU grid (Feb 2025)
- EstLink 3 in permitting (700 MW)
- The Estonia–Latvia 4th electricity interconnection – National Designated Spatial Plan initiated
- Port of Tallinn adapting for offshore wind logistics

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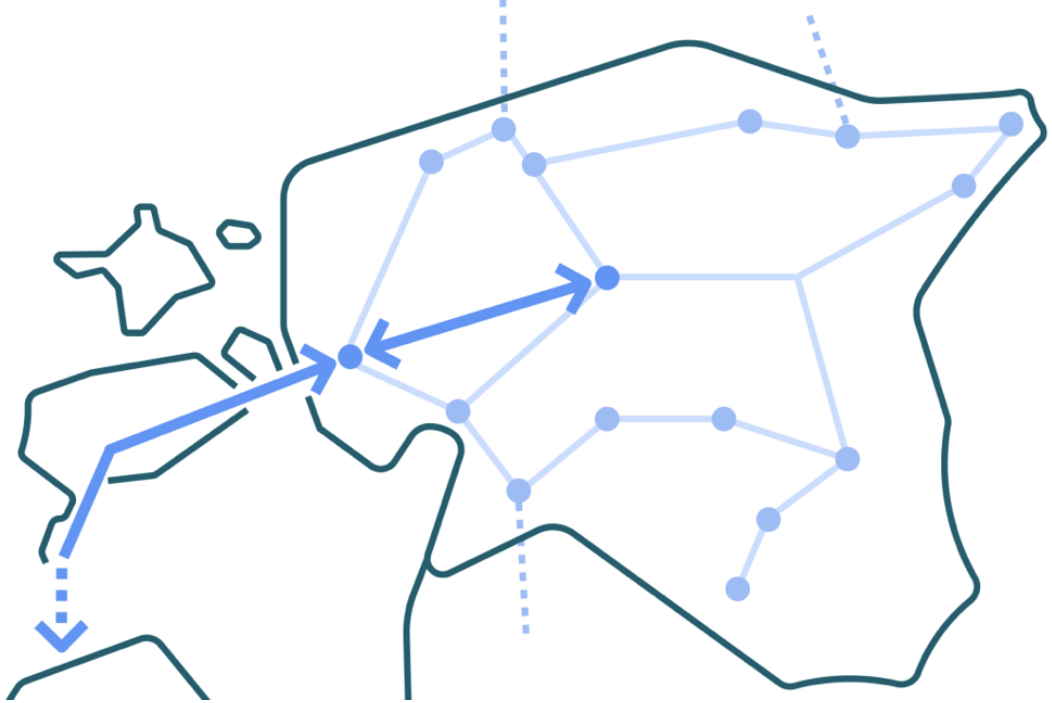

Estonia’s Policy Shifts 2025

- Offshore wind CfD auction volume reduced from **4 TWh → 2 TWh → cancelled**
- Transitioning towards guarantee-based support models
- Enefit Green and Sumitomo ended Liivi Bay cooperation

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How Estonia Could Use CISAF for Offshore Wind

- Investment aid for large-scale offshore wind farms to reduce CAPEX risk
- Grid and interconnector development in Baltic Sea
- Support for innovative solutions
- Green hydrogen production from offshore wind

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How Estonia Should Move Offshore Wind Forward

Clear national targets

- Offshore wind roadmap (2030 / 2035 / 2040 milestones)
- Linked with grid and interconnector development

Reduce CAPEX & risks

- State guarantees or price floors (CfD-like models)
- Leverage CISAF, CEF, Innovation Fund, EIB financing
- Early funding for grid

Create large-scale demand

- Anchor consumers: hydrogen, e-fuels, data centers, ports
- Standardized corporate PPAs with state-backed guarantees

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