

# A test case for Europe: what the new wind market conditions in Poland mean for SMEs

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Poland is entering a new phase of onshore wind development. After years of restrictions, regulatory changes could make way for new opportunities. At the same time, a major reform of the electricity grid connection framework is addressing another defining challenge that renewable energy developers face: how to connect new generation to a grid already under pressure.

These changes could not only accelerate wind deployment but also change who is best placed to deliver it. For smaller and mid-sized developers, this may be an important moment.

## From a constrained market to a new development cycle

Poland has long been one of Europe's most promising markets for onshore wind. But the sector was significantly constrained by the so-called 10H rule, which linked the minimum distance between wind turbines and residential buildings to ten times the turbine's total height.

The 2023 amendment changed this framework, allowing local spatial plans to permit wind projects at a minimum distance of 700 metres from residential buildings. The change did not remove the planning challenge, but it materially increased the area in which projects could potentially be developed.

For developers, this matters because today's turbines are substantially larger and more

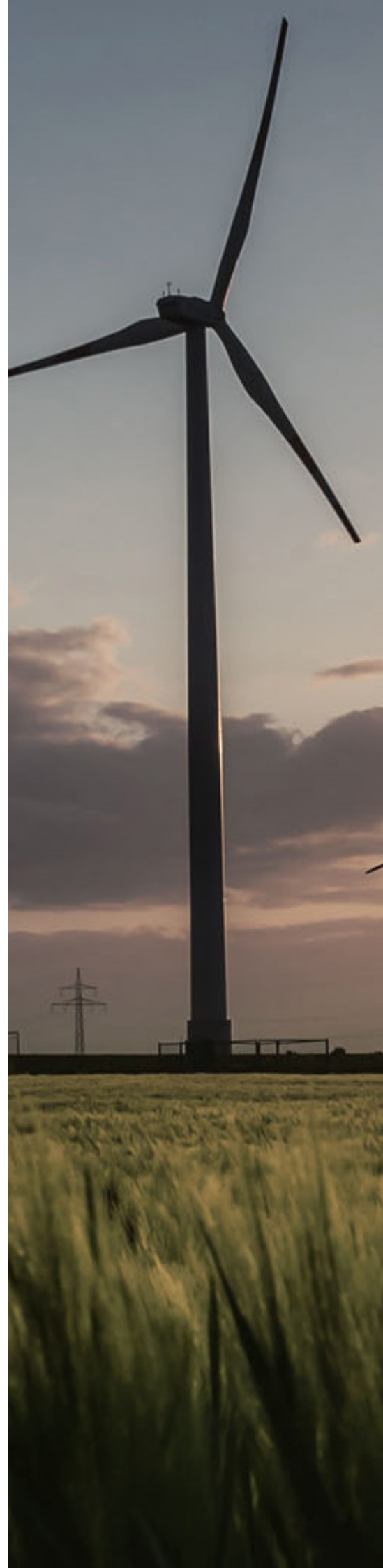
productive than those used a decade ago. The relaxation of spatial constraints has therefore unblocked development opportunities that were previously difficult or impossible to pursue.

Our own experience illustrates this change. We began developing and building wind farms in Poland in the early 2000s. After a long period without new construction, we are now building our largest wind project to date, the 123.9 MW Walcz wind farm and developing an even bigger one. These are two projects that had seemed impossible to implement just a few years ago.

Solving the land issue is only one part of the equation. The next bottleneck is the grid.

Poland's renewed energy ambitions are increasingly running into a fundamental infrastructure constraint: available grid capacity.

The grid challenge is significant. According to the European Commission, connection requests representing approximately 42 GW of renewable







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capacity was declined in Poland in 2025. The Commission has identified grid bottlenecks and a lack of system flexibility as important factors slowing the country's energy transition. This is why Poland's new grid-connection framework is potentially so important.

The Act of 13 March 2026 amending the Energy Law and other legislation entered into force principally on 30th April 2026, although some provisions have later effective dates. The legislation introduces changes intended to make the connection process more disciplined and efficient. Among the most interesting are new forms of flexible and configurable connection agreements.

A flexible connection can allow a project to connect with temporary restrictions on electricity injection while the network



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reinforcement required for an unrestricted connection is completed. Those restrictions can remain until the relevant network expansion is delivered, subject to the statutory framework.

A configurable connection goes a step further. Where unrestricted connection is not possible even after planned network expansion, the parties can agree to connection arrangements with restrictions that can vary according to factors such as time periods, network conditions or available system reserves.

However, we still do not have enough practical experience to assess how these mechanisms will work in practice, particularly in terms of their availability, conditions and bankability for developers. While the possibility of flexible connections certainly has significant potential,

the practical implementation of this new legislation still needs to be clarified and tested.

#### From pipeline size to execution capability

The changes to the application and connection process may already be affecting the volume and quality of projects seeking grid access. The introduction of connection application fees and stronger requirements appears to be reducing speculative applications, while some demand-side and battery energy storage system (BESS) projects have fallen away from the connection lists.

This suggests that the changes are already having a significant impact on the connection pipeline. At the same time, it is still too early to assess the full effect on existing connection conditions and connection agreements; this should become clearer around November.

The clean-up of speculative or 'phantom' projects should ultimately improve the quality and efficiency of the connection process for projects that are genuinely ready to connect. The reforms will take time to take full effect. The full potential of configurable agreements and commercial connections has yet to be realised. Nevertheless, there are already some positive developments, such as the availability of information on connection capacity for demand-side projects through investment maps and the Electronic Connection Service System (ESOP).

#### Are we facing a restructuring of Poland's wind market?

For years, developers have operated in an environment where securing land, development rights and grid capacity could be



Renewed development activity is opening opportunities for onshore wind projects



Grid access and project deliverability are becoming increasingly important in Poland's wind market

a major part of building a project pipeline. But scarce grid capacity also creates a risk: projects that are unlikely to progress can occupy capacity that could otherwise be used by projects capable of reaching construction.

The new framework introduces stronger requirements around project progress. For example, connection agreements for installations connected above 1 kV can expire if developers fail to meet specified milestones, including requirements relating to obtaining final building permits within defined periods.

The competitive advantage may increasingly lie not in having the largest pipeline, but in having the most credible pipeline.

This is where SMEs can play an important role. Smaller and mid-sized developers may not compete with the largest utilities and infrastructure investors on balance-sheet size. But they can compete on development expertise, local knowledge, speed of decision-making and the ability to focus resources on projects that are genuinely capable of reaching construction.

We believe the new framework will support companies with real development expertise, solid pipelines and the ability to deliver projects through construction and into operation. Over time, we also expect the changes to gradually improve the availability and efficiency of the connection process across the market.

That does not mean the new framework will automatically favour smaller companies. Large developers retain significant advantages in financing, procurement and delivering larger portfolios. But a more disciplined connection process could create

greater opportunities for specialist and mid-sized companies whose projects are mature, well prepared and deliverable.

#### A bigger role for partnerships

The opportunity for SMEs may also extend beyond developing projects independently. As Poland's wind market expands, partnerships between developers, investors, utilities, industrial energy users and infrastructure companies could become increasingly important.

An experienced SME may bring something that cannot easily be bought: a deep understanding of a local market, established relationships with landowners and communities, planning expertise and a project pipeline that has been developed over many years. Larger partners can then bring capital, construction capabilities or access to long-term energy offtake.

This creates the possibility of a more diverse development ecosystem, in which projects can progress through combinations of complementary capabilities rather than requiring every developer to possess the same balance sheet and resources.

#### Poland as a test case for Europe's next wind cycle

The significance of Poland's reforms therefore goes beyond the Polish market. Across Europe, renewable developers face a similar combination of challenges: ambitious deployment targets, limited grid capacity, lengthy permitting processes and increasing competition for suitable sites.

The lesson emerging from Poland is that

removing one bottleneck can simply expose the next. Relaxing spatial constraints can create more potential wind projects. But without sufficient grid capacity, those projects cannot deliver electricity. Improving grid access, meanwhile, is only useful if developers can demonstrate that their projects are real and can progress. That makes execution capacity increasingly important.

Wind developers will need to combine the skills of traditional project developers with a much deeper understanding of the electricity system: grid constraints, flexibility, curtailment, market exposure and the value of electricity at different times and locations. For SMEs, this could be an opportunity rather than a disadvantage. Poland, like many other European markets, does not necessarily need bigger developers. It needs more projects that can actually be built.

If the new regulatory framework succeeds in making grid capacity more efficiently available while rewarding credible development and timely execution, it could help create precisely that environment.

The success of Poland's next wind cycle should therefore not be measured only in 'freed up' gigawatts of new capacity. It should also be measured by whether the market can turn existing development projects into an increasing number of operating wind farms. For companies with the expertise, pipeline and ambition to deliver, Poland's wind market may be opening a new door.

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