



Towarzystwo Elektrowni Wodnych



# Hydropower in Poland - looking forward for a new stimulus

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HYDROPOWER  
EUROPE

Nordic Workshop  
28-29 August 2019  
Lulea University of Technology  
Lulea-Sweden

- macroeconomic data of the country
- current status of the power sector
- hydropower potential and its use
- development trends
- challenges and opportunities
- projects under development

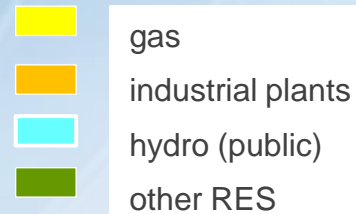
**Wloclawek HPP, 162 MW**

Vistula river, commissioning 1970  
the latest large classic hydropower plant in Poland



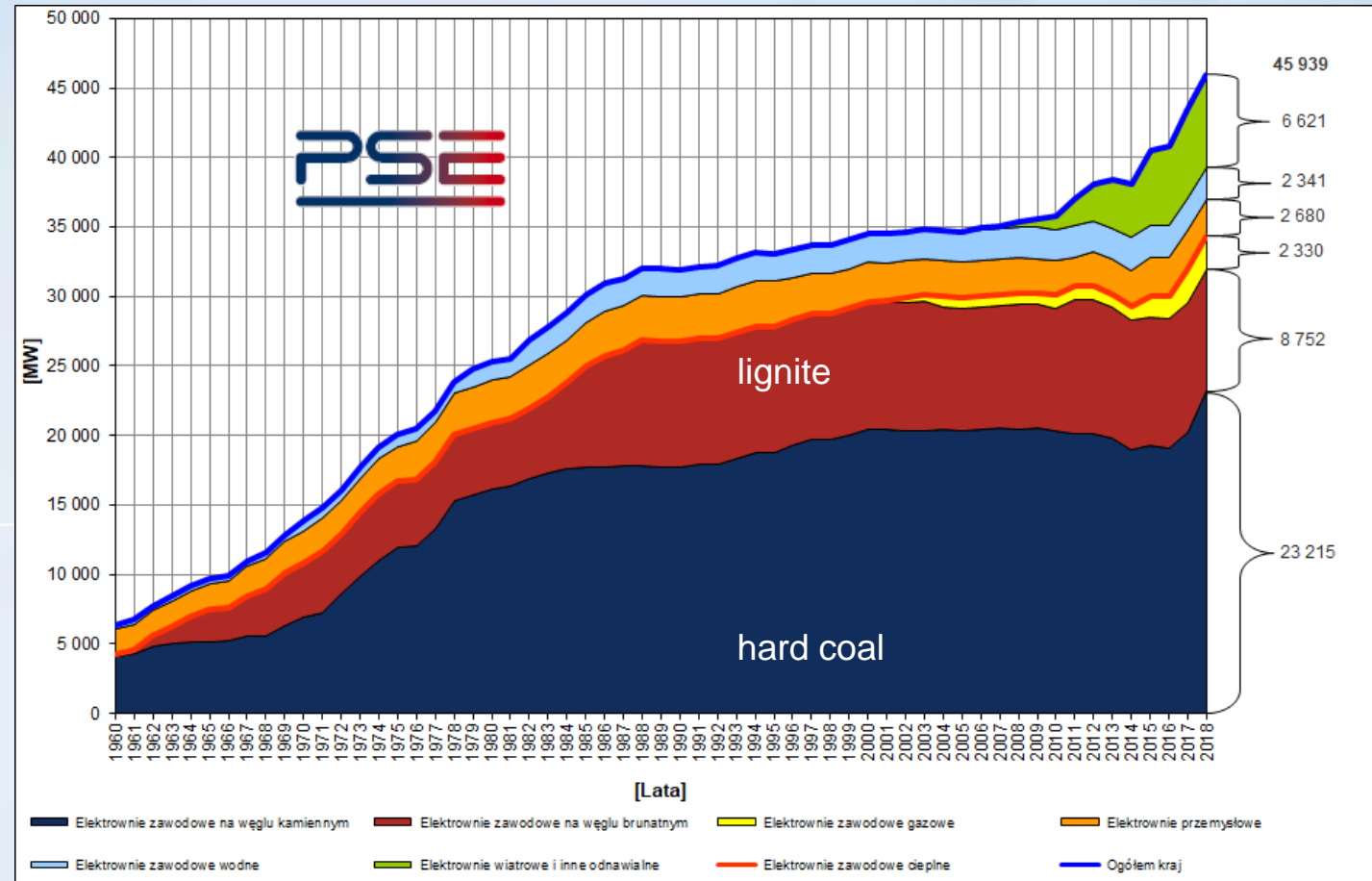
## Macroeconomic data

Surface	312 500 km <sup>2</sup>
Population	38,4 mln
GDP	466 mld EUR
Unemployment (2017)	7,0 %
Renewables share	10,9 %

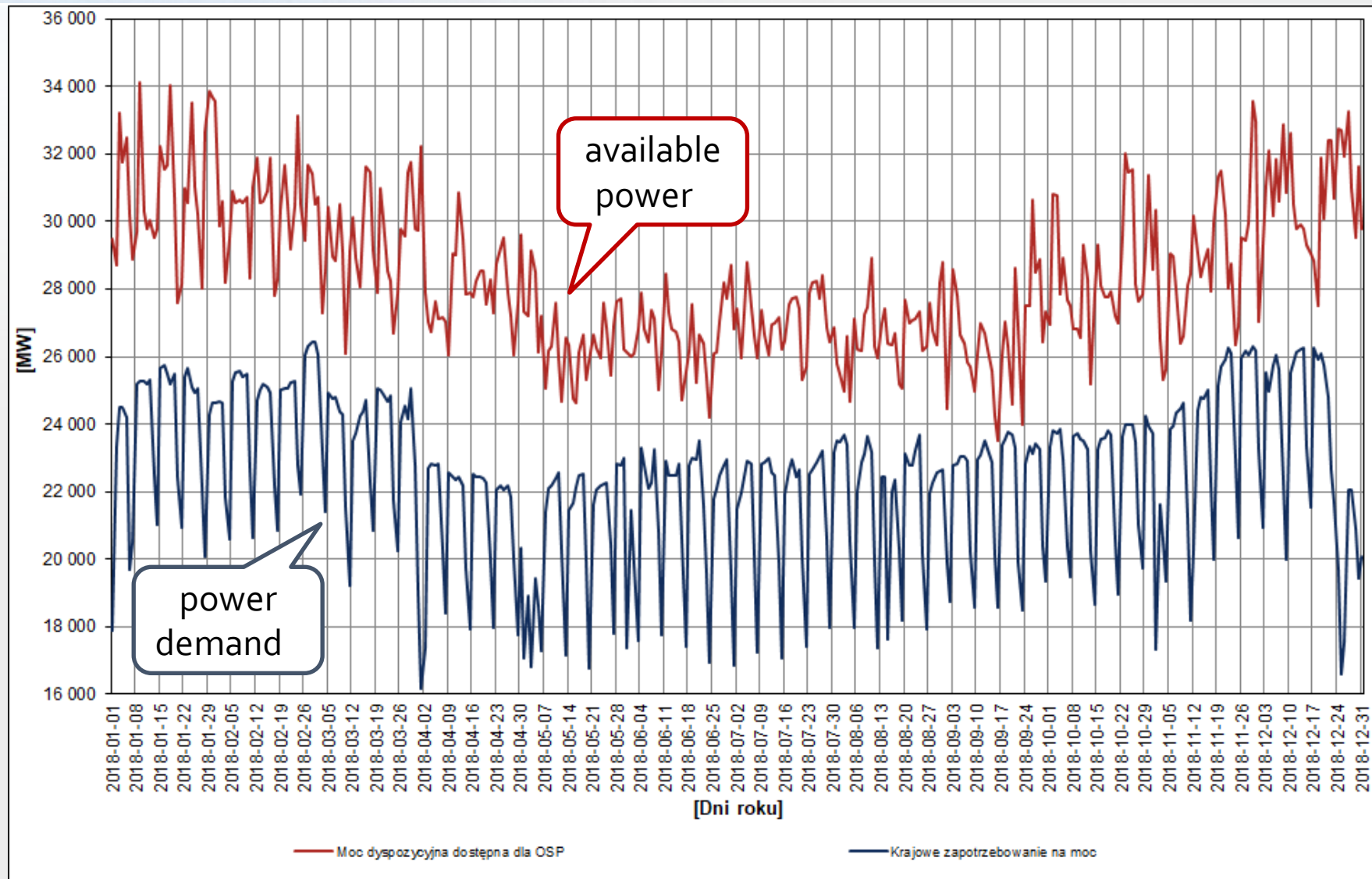


## Electrical power sector (2018)

installed power	45 939 MW
generation	165 214 GWh
consumption	170 932 GWh
renewables generation (2017)	24 122 GWh
renewables share (2017)	14,5 %



# Out of the PSE power balance for the year 2018



# Out of the annual PSE power balance for May 2019



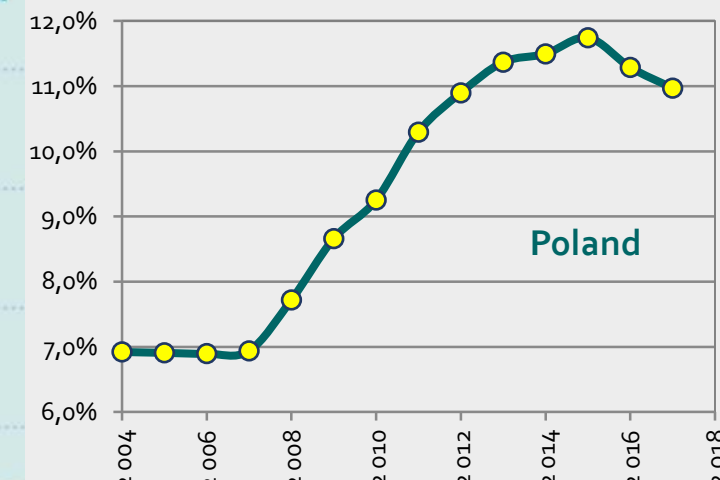
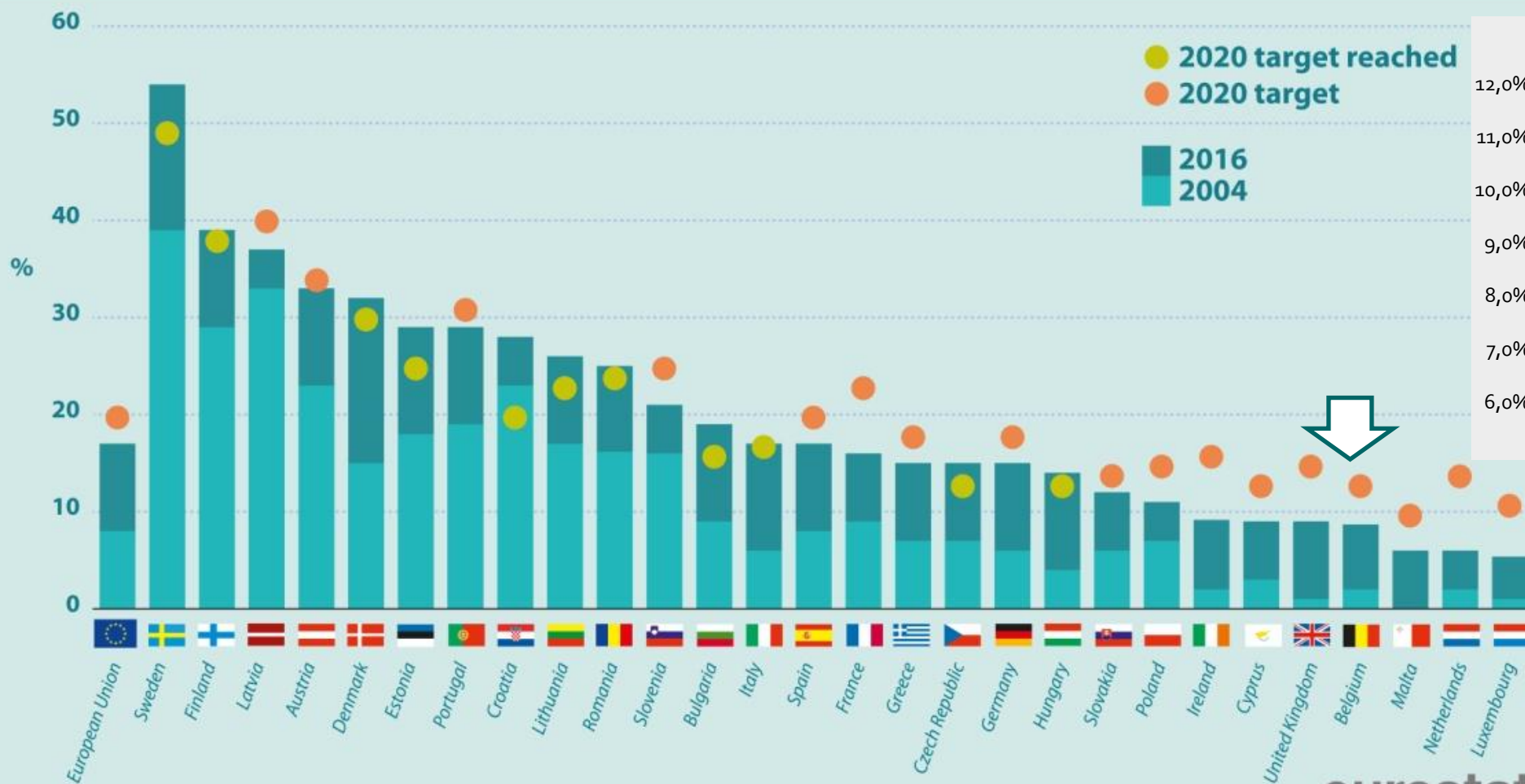
Attainable capacity of Polish power plants, MW	45 802
Attainable capacity of CD Units, MW	29 285
Attainable capacity of CD Thermal Units, MW	27 579
Attainable capacity of CD Hydraulic Units, MW	1 706
Attainable capacity of Wind Units, MW	5 917
CD Units capacity as available for the TSO, MW	22 640
Capacity of Polish power plants as available for the TSO, MW	26 742
Power demand of Poland, MW	22 750
Power surplus available for the TSO, MW	3 992
Power surplus required by the TSO, MW	4 095
Difference between the power surplus available and required by the TSO, MW	-103

**CDU** – Centrally Dispatched Unit

**TSO** – Transmission System Operator

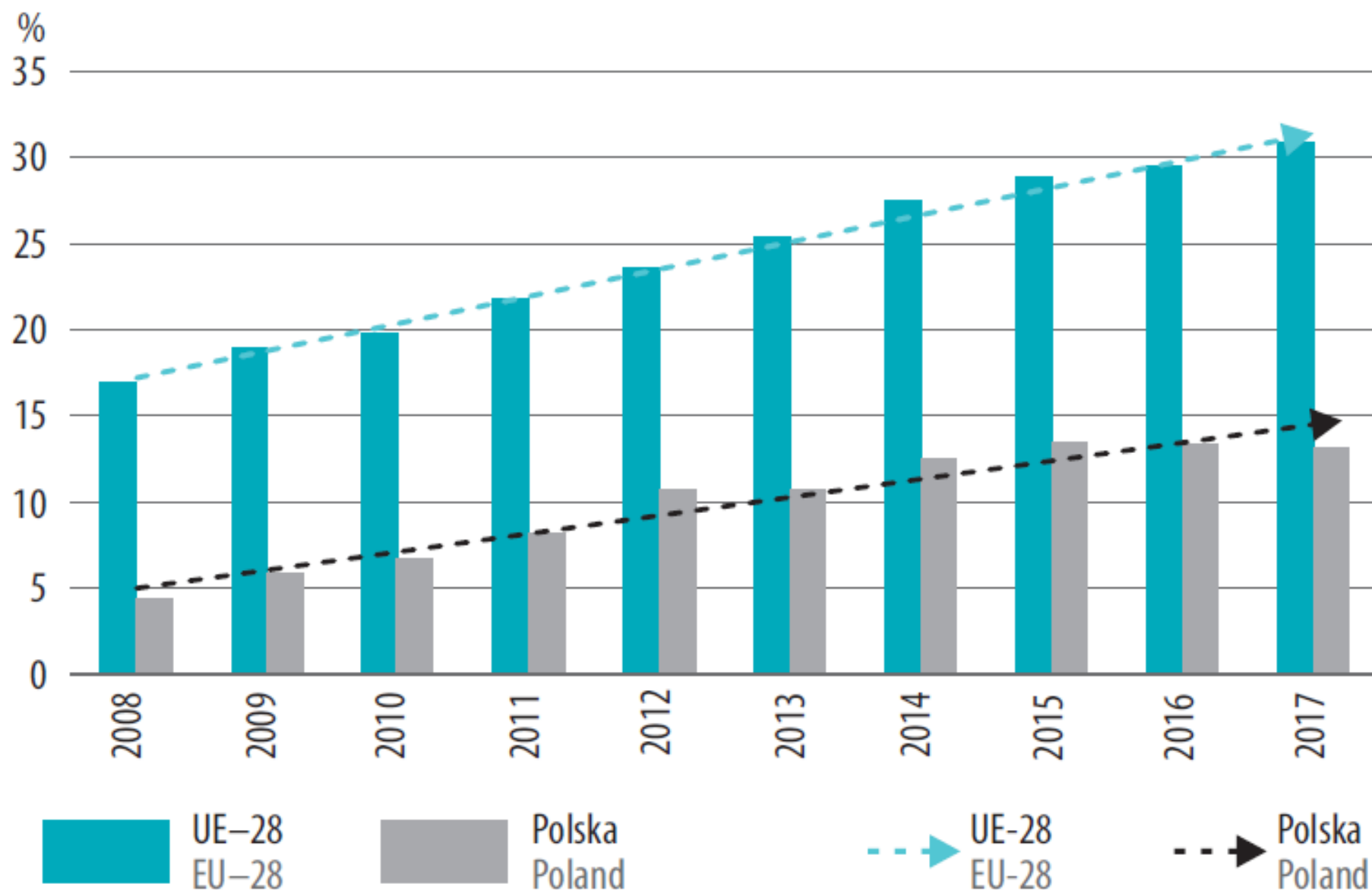
# Share of energy from renewable sources in the EU Member States

(in % of gross final energy consumption)



# Udział energii OZE w końcowym zużyciu energii brutto w elektroenergetyce w latach 2008-2017

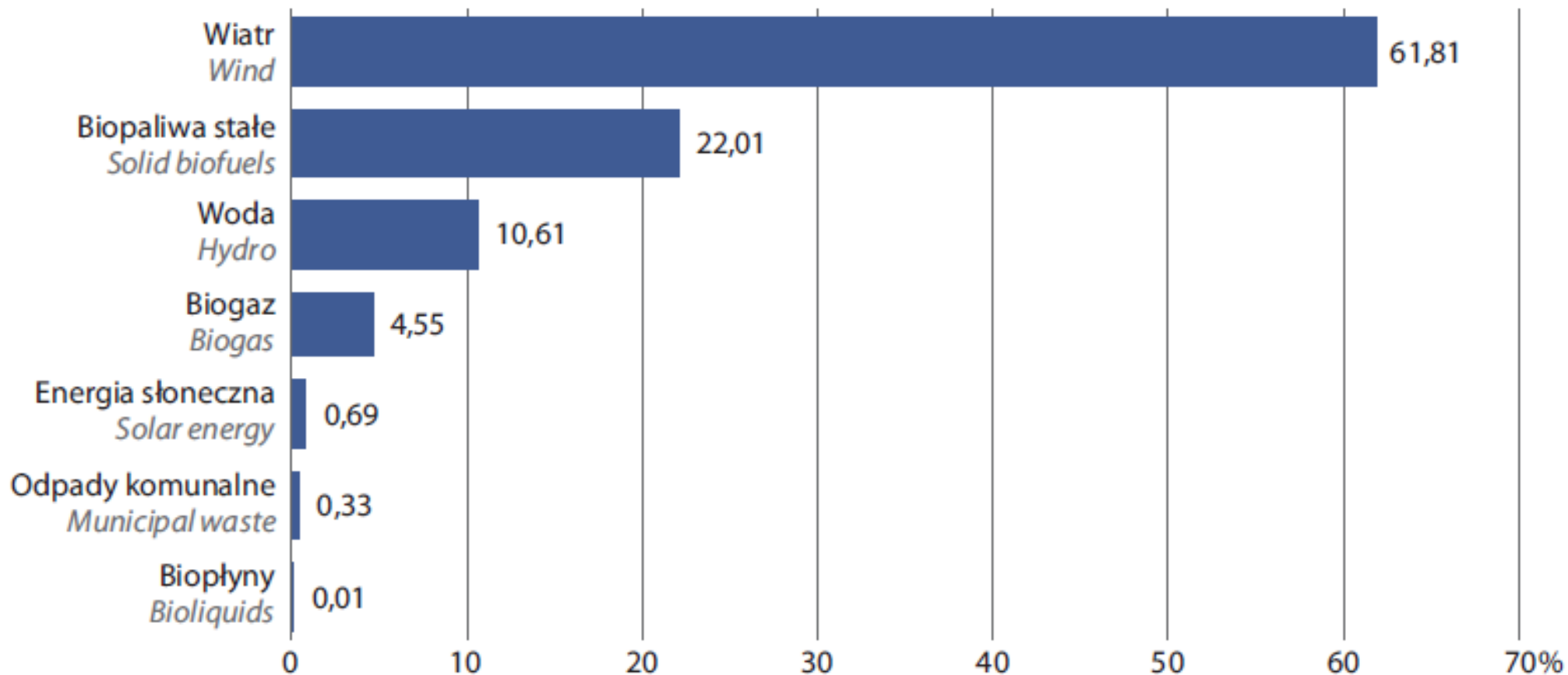
Share of renewable energy in final gross energy consumption of electricity in 2008-2017





## Wykres 39. Udział nośników energii odnawialnej w produkcji energii elektrycznej w 2017 r.

Chart 39. Share of renewable energy carriers in electricity production in 2017



GUS

Main Statistical Office

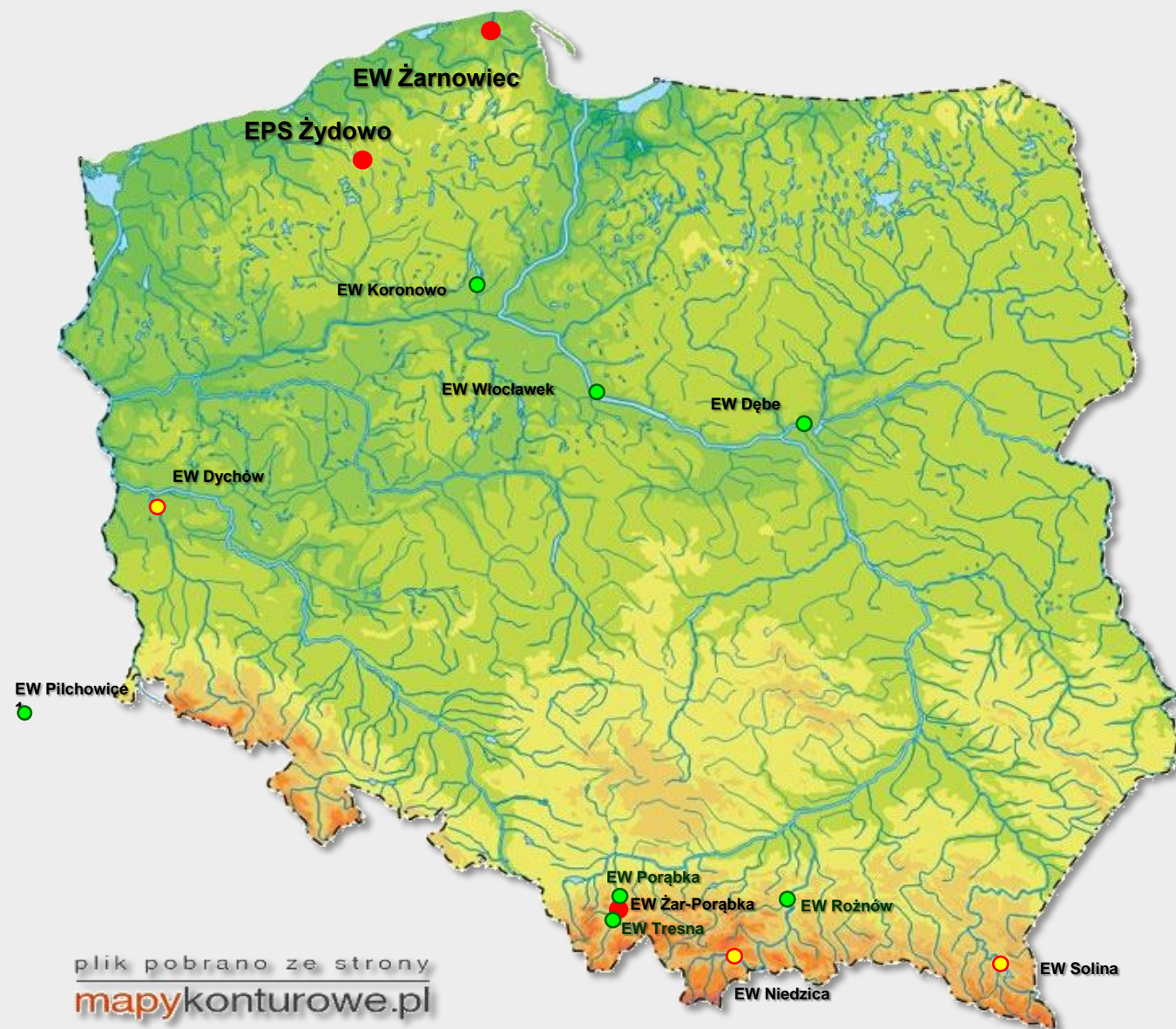
Warszawa Warszawa 2018

## Energia ze źródeł odnawialnych w 2017 r.

Energy from renewable sources in 2017

Power plant	Capacity, MW
Włocławek	160,2
Rożnów	50
Koronowo	26
Tresna	21
Debe	20
Pilchowice I	13,4
Porąbka	11
Solina	200
Dychów	91,5
Niedzica	91,5
mixed pumping total	383
renewable total	685
Porąbka-Żar	500
Żarnowiec	716
Żydowo	167
pumped storage total	1383
large hydro total	2068

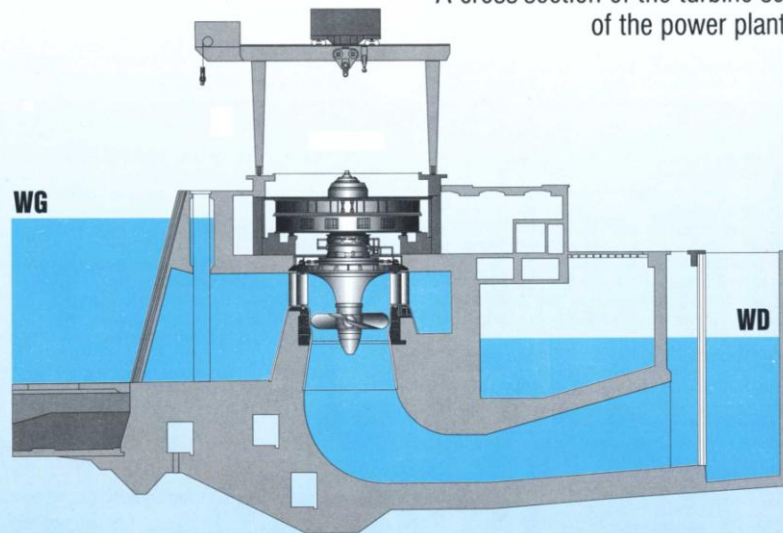
Current status: Large hydro in Poland







Przekrój poprzeczny elektrowni  
przez hydrozespół.  
A cross-section of the turbine set  
of the power plant.



**EW Włocławek, 162 MW**





## Żarnowiec

### Pumped Storage Power Plant (1983)

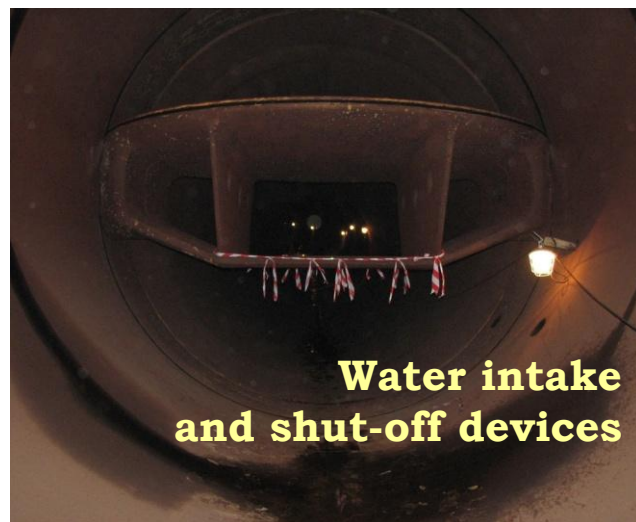
$H = 106 \div 126 \text{ m}$

$P = 4 \times 179 \text{ MW}$  (turbine mode)

$4 \times 200 \text{ MW}$  (pump mode)



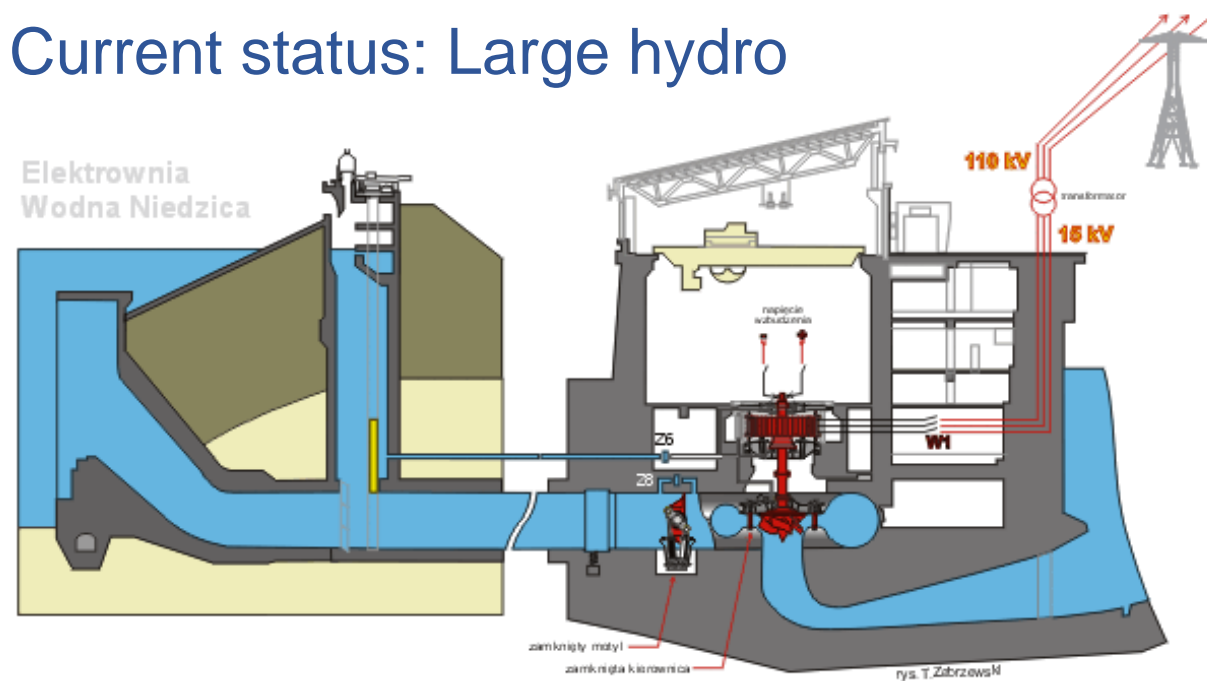




**Water intake  
and shut-off devices**



Current status: Large hydro



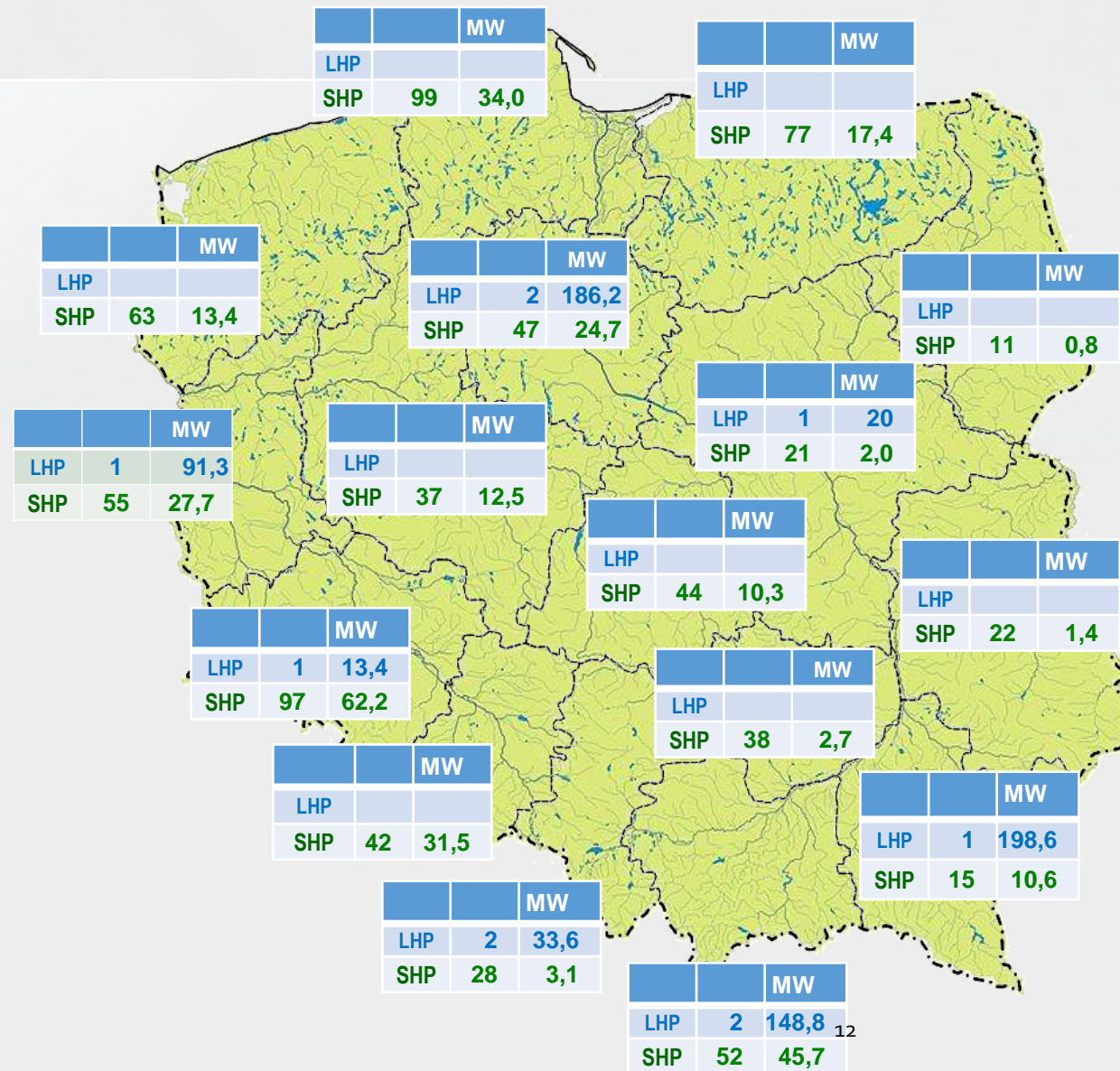
**EW Niedzica  
2 x 46 MW**



State of 31.12.2016

Category	No of plants	Capacity
$P \leq 0,3 \text{ MW}$	583	44,6
$0,3 \text{ MW} < P \leq 1 \text{ MW}$	97	58,7
$1 \text{ MW} < P \leq 5 \text{ MW}$	66	158,6
$5 \text{ MW} < P \leq 10 \text{ MW}$	6	48,3
<b>small hydro total</b>	<b>737</b>	<b>302,1</b>
classic large hydro	7	309,2
pumped storage with natural inflow	3	382,7
<b>renewable hydro total</b>	<b>747</b>	<b>994,0</b>
<b>2018</b>	<b>752</b>	<b>981,0</b>

## Current status: Renewable hydro in Poland



## Current status: New small hydro installations at existing weirs



Kozielno low head SHP at Nysa Kłodzka river,  $P = 1,85$  MW



Current status: New small hydro installations at existing weirs

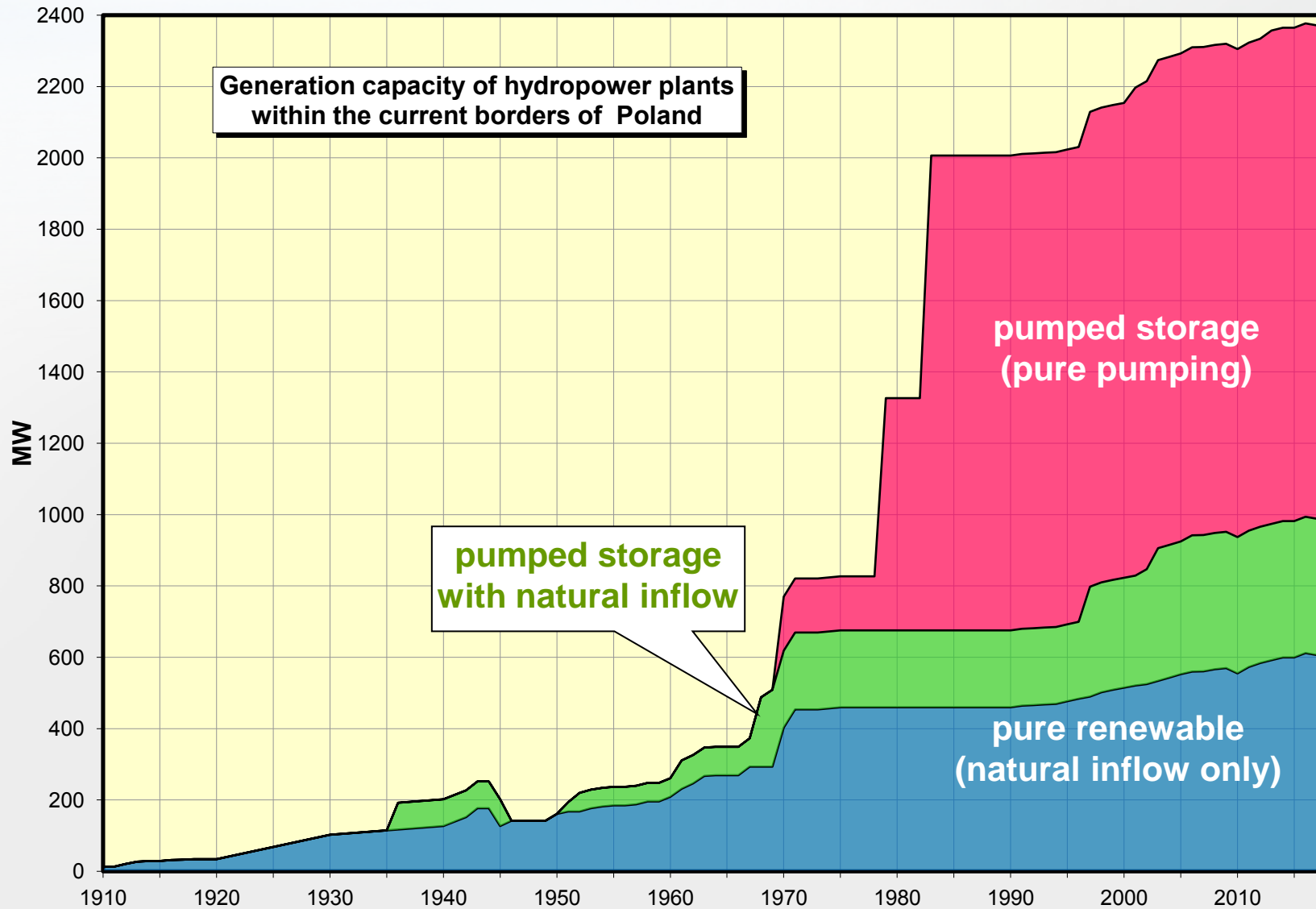
Zawada low head SHP at Upper Oder

$P = 1500 \text{ kW}$ ,  $Q_{\max} = 43 \text{ m}^3/\text{s}$

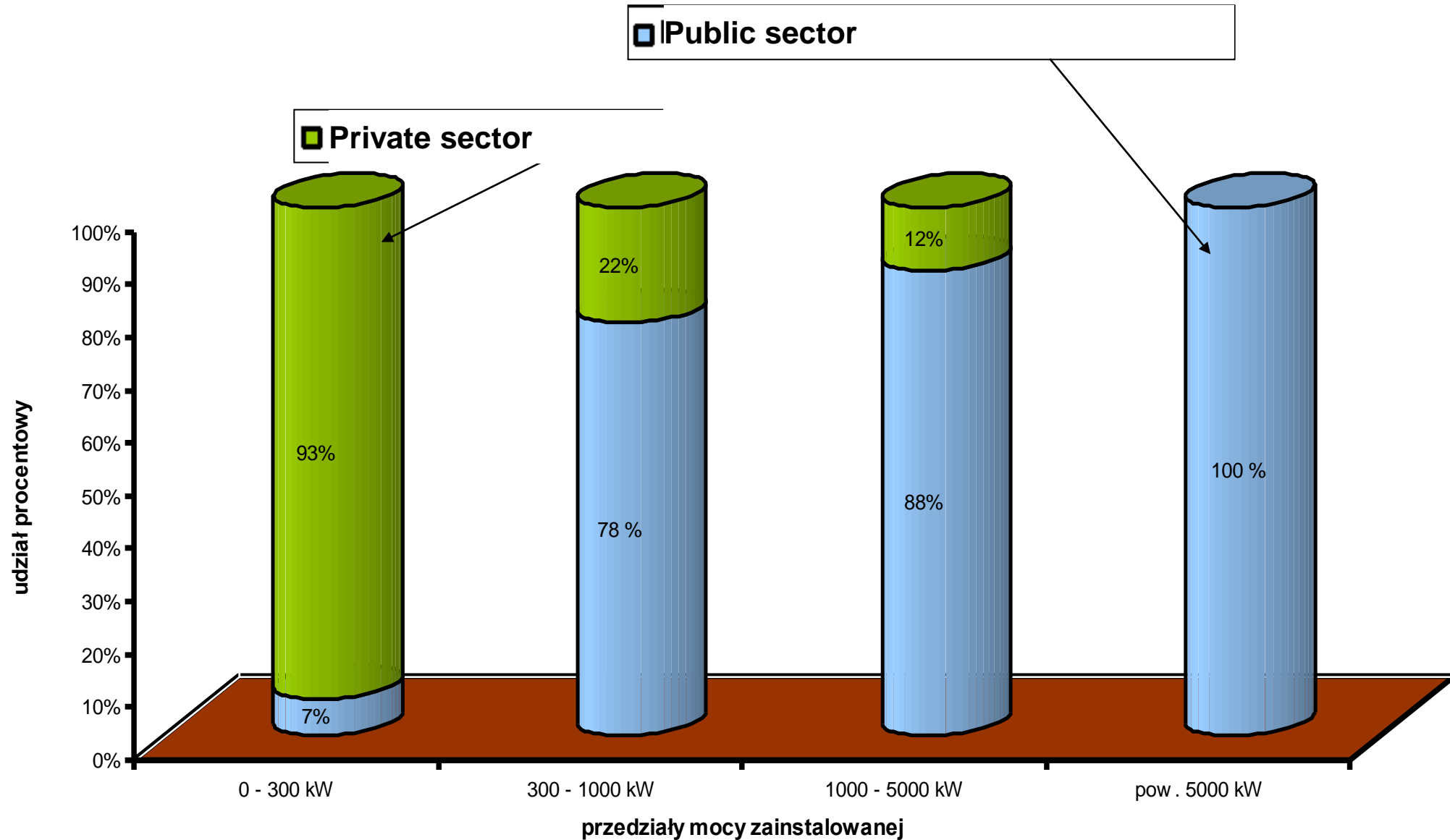




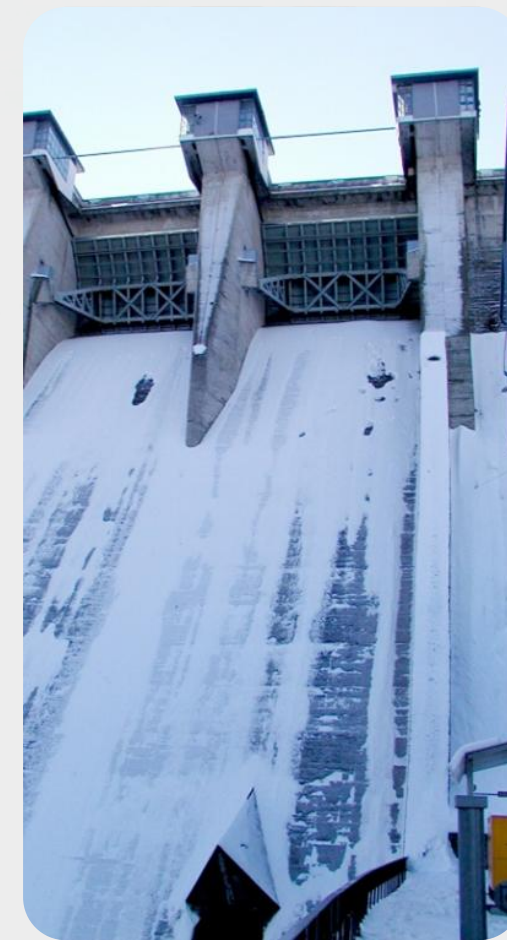
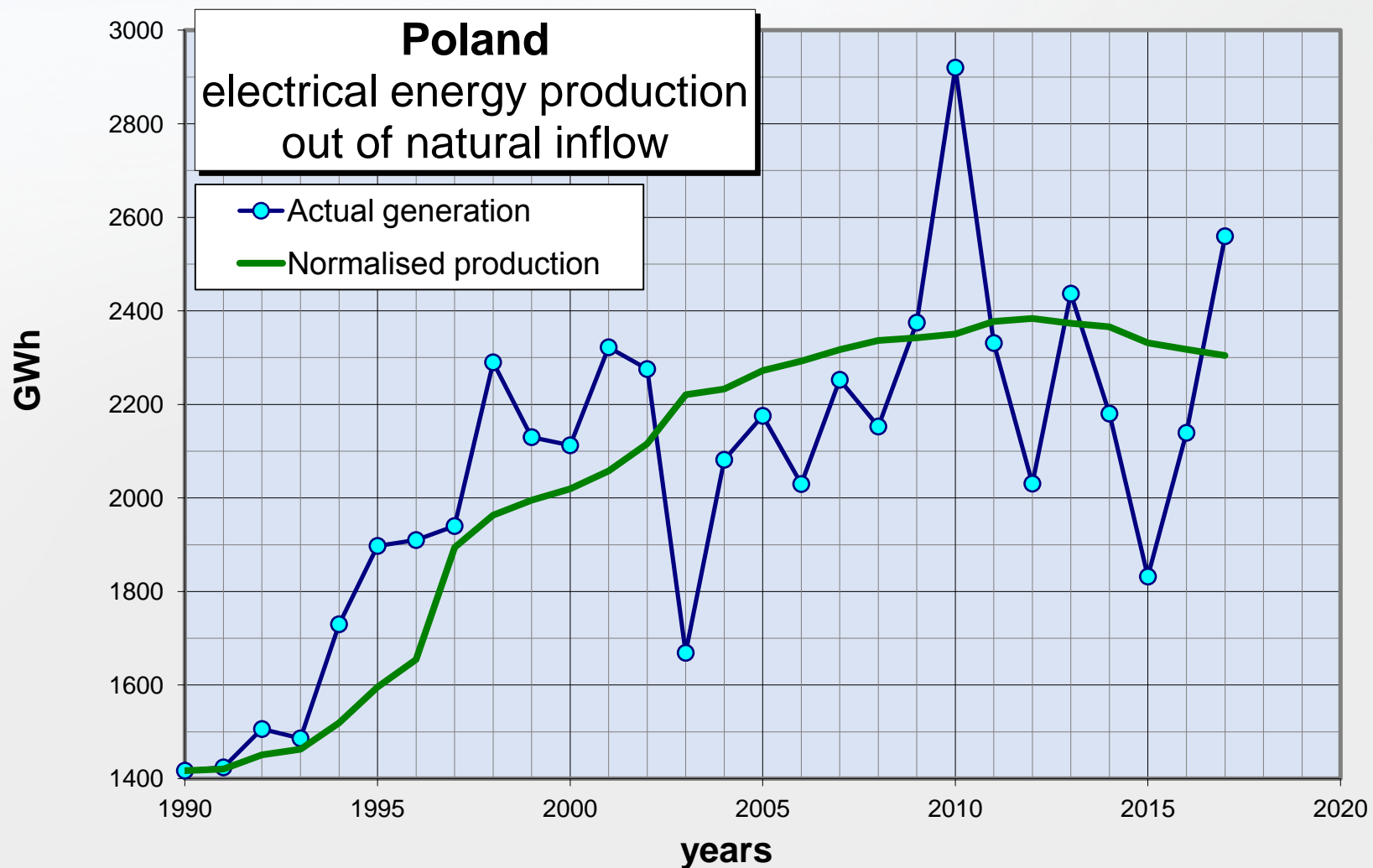
# Looking backwards – over 120 years of history (since 1896)



# Share of public and private sector in the total number of hydropower plants in Poland



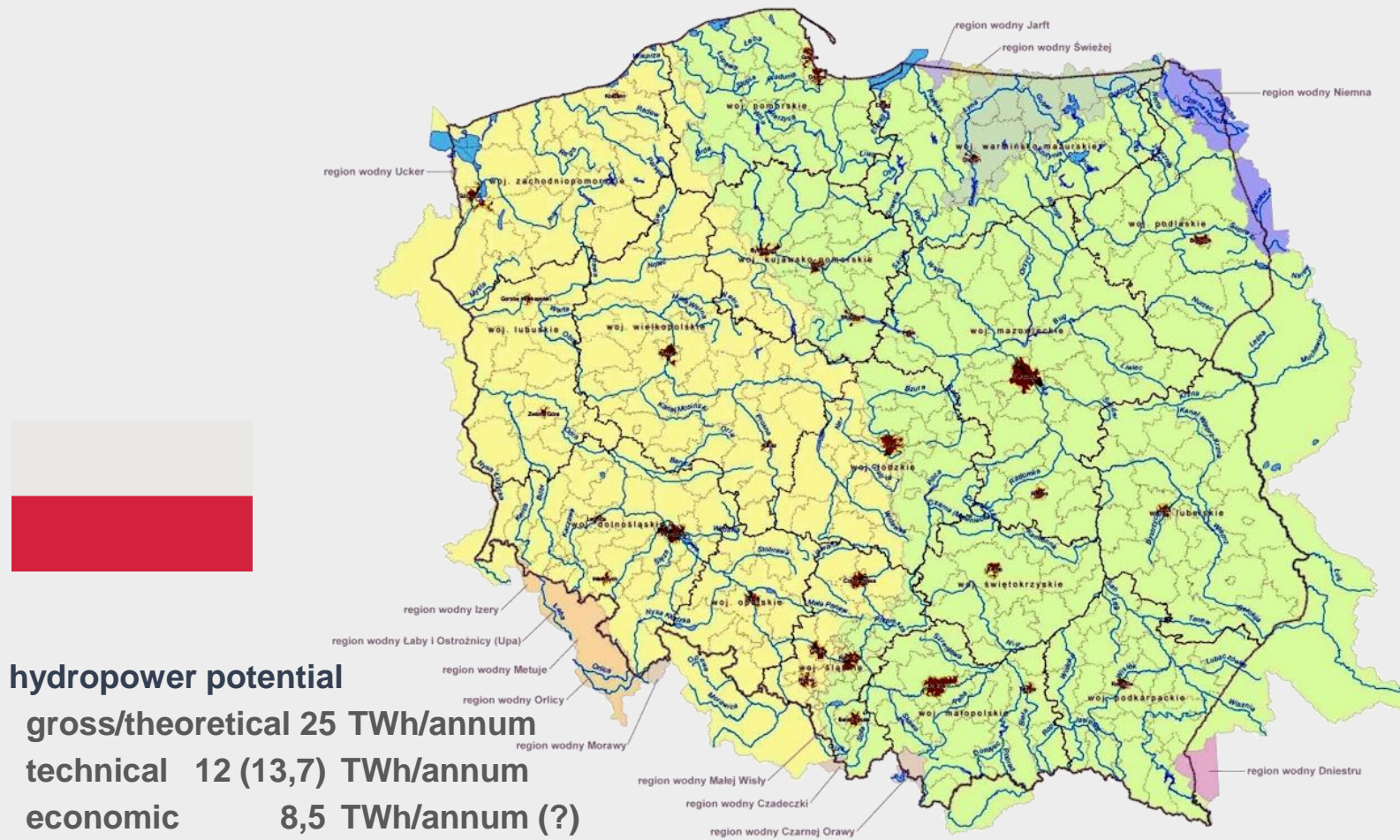
# Current trends in hydropower electricity generation





- a lowland country with modest hydropower potential

No.	Water system	Potential, GWh
1	Vistula + catchment basin	9 270
2	Vistula	6 177
3	Left bank tributaries	513
4	Pilica	170
5	Brda	119
6	others	224
7	Right bank tributaries	2 580
8	Dunajec	814
9	Wisłoka	126
10	San	714
11	Bug	309
12	Narew	179
13	others	438
14	Oder + catchment basin	2 400
15	Oder	1 273
16	Left bank tributaries	619
17	Nysa Kłodzka	134
18	Bóbr	320
19	others	165
20	Right bank tributaries	507
21	Warta	351
22	others	156
23	others (mainly small rivers in Pomerania)	280
Total (items 1+14+23)		11 950



**hydropower potential**

gross/theoretical	25 TWh/annum
technical	12 (13,7) TWh/annum
economic	8,5 TWh/annum (?)

**small hydro**

technical	5,1 TWh/annum
economic	2.5 TWh/annum

# Hydropower potential and its use in Poland and EU

Data source:  
HYDI, 2011



No.	Member State	Technical potential	Installed capacity (RES)	Normalised production (RES)	Utilisation of the technical potential	Specific investment costs	
						<10 MW	≥ 10 MW
		GWh/year	MW	GWh	%	k€/kW	k€/kW
1	Austria	73 000	8 380	38 746	53,1	4,5	no data
2	Belgium	400	119	370	92,5	2,5 ÷ 12	no data
3	Bulgaria <sup>1</sup>	4520	3 019	3693	92,5	1,4 ÷ 1,5	no data
4	Czech Rep.	4 880	1 531	2 253	46,2	6,8	3
5	Estonia	163	6,8	22	13,5	1,9	no data
6	Finland	16 916	3 049	14 000	82,8	3,5	no data
7	France	120 000	25 423	61 650	51,4	2,3 ÷ 4,5	2,0 ÷ 3,0
8	Germany	36 000	3 905	19 503	54,2	7,5	no data
9	Grecja	no data	3 200	5 239	b.d.	1,5	2
10	Ireland	847	241	788	93	3,0 ÷ 12	no data
11	Italy	160 000	17 721	44 092	27,6	4,5	b.d.
12	Latvia	5 360	1 553	2 963	55,3	2,6	no data
13	Lithuania	2 090	130	422	20,2	2,5	no data
14	Poland	12 000	945	2 353	19,6	6,5	>10
15	Portugal	19 440	5 039	11 380	58,5	2,5	no data
16	Romania	34 509	6 403	17 193	49,8	2,5 ÷ 3,5	4,0 ÷ 5,0
17	Slovakia	7 560	1 802	4 424	58,5	6,35	6,36
18	Slovenia	8 800	1 219	5 241	59,6	7	6
19	Spain	68 500	no data	28 230	41,2	1,5	no data
20	Sweden	130 000	16 934	68 071	52,4	3,1 ÷ 3,5	1,3
21	UK	27 203	1 542	4 965	18,1	3,0 ÷ 12	1,8

<sup>1</sup> Economic potential shown instead of the technical one.

# Economic constraints & support system

## **before 2004**

- feed-in-tariffs for small hydro (< 5 MW)
- wide use of ancillary services and energy storage (especially before mid 1990-ies)

## **2004-2015**

- green certificate system for all renewables
- low use of energy storage due to environmental and economic reasons

## **currently**

- green certificate system coming gradually to the end (till 2020)
- auction system for new and rehabilitated hydro up to 20 MW (15 years of guaranteed electricity price)
- feed-in-tariffs and premiums for small hydro below 1 MW (mini SHPs)
- low use of energy storage



# Threats for existing power plants

- **instability** of legal and economic conditions - lack of consequent, hydropower oriented policy
- **high risk** for a producer in the current auction system
- rehabilitation **projects undertaken just to receive a 15 years support period**
- **no guarantee of long-year profitability** for non rehabilitated installations or after 15 years of support
- **heavy** fiscal **burdens** and those related to maintenance of used multipurpose dams owned by water management authorities
- too high **electricity transmission prices** to justify energy storage in pumped storage installations on the buy-and-sell basis
- too **low price difference** to justify energy storage
- heavy **environmental requirements** and strong position of green lobby

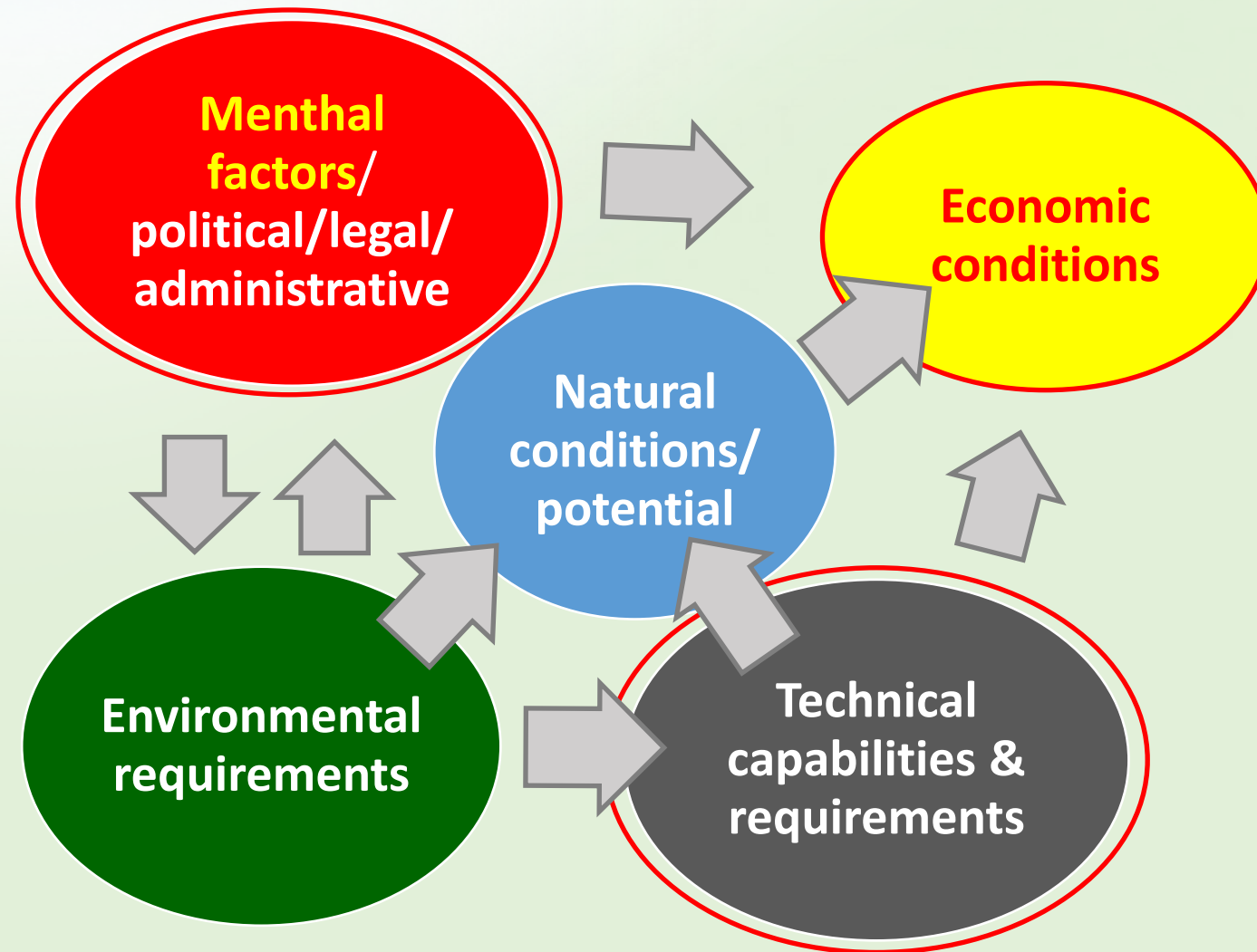
*The installed capacity of Polish hydropower plants has been falling down in 2017 and 2018 according to the national regulator data.*

# Expectations of public hydropower operators according to a recent TEW inquiry

- Payment for **water retention service** (rather unlikely)
- Verifying and re-ordering **the system of managing the hydropower related decisions**  
(Wody Polskie state enterprise is currently both a party and a decision maker in the administrative procedure)
- Waiving the water retention service providers of **the water use fee**
- Including restoration of **water retention capacity in existing reservoirs** in the currently prepared water retention development plan for the period of 2021-2030



# Development barriers in categories



# Hydropower development barriers - mental factors

- **Insufficient understanding of the need** to develop renewable energy sources
  - action taken only under the EU pressure
- **Underestimating hydropower potential of the country**
- **Prioritising local ecological goals over global ones** (mitigation of climate change effects, flood and drought protection, preserving fossil fuels for future generations, water and energy safety etc.) **by the green NGOs and some political powers**
- **Lack of understanding for the role of hydropower**  
in the electrical power grid penetrated by intermittent electricity sources
  - attempts to use electrochemical storage as basic energy storage technique
- **Inconsequent water management policy**
  - multidecade disregard of the increasing water deficit and flood threat
  - the same for preserving/development of inland navigation routes

*The national water management policy shows positive changes in recent years.  
It is only to be hoped that a national consensus on this issue is possible.*



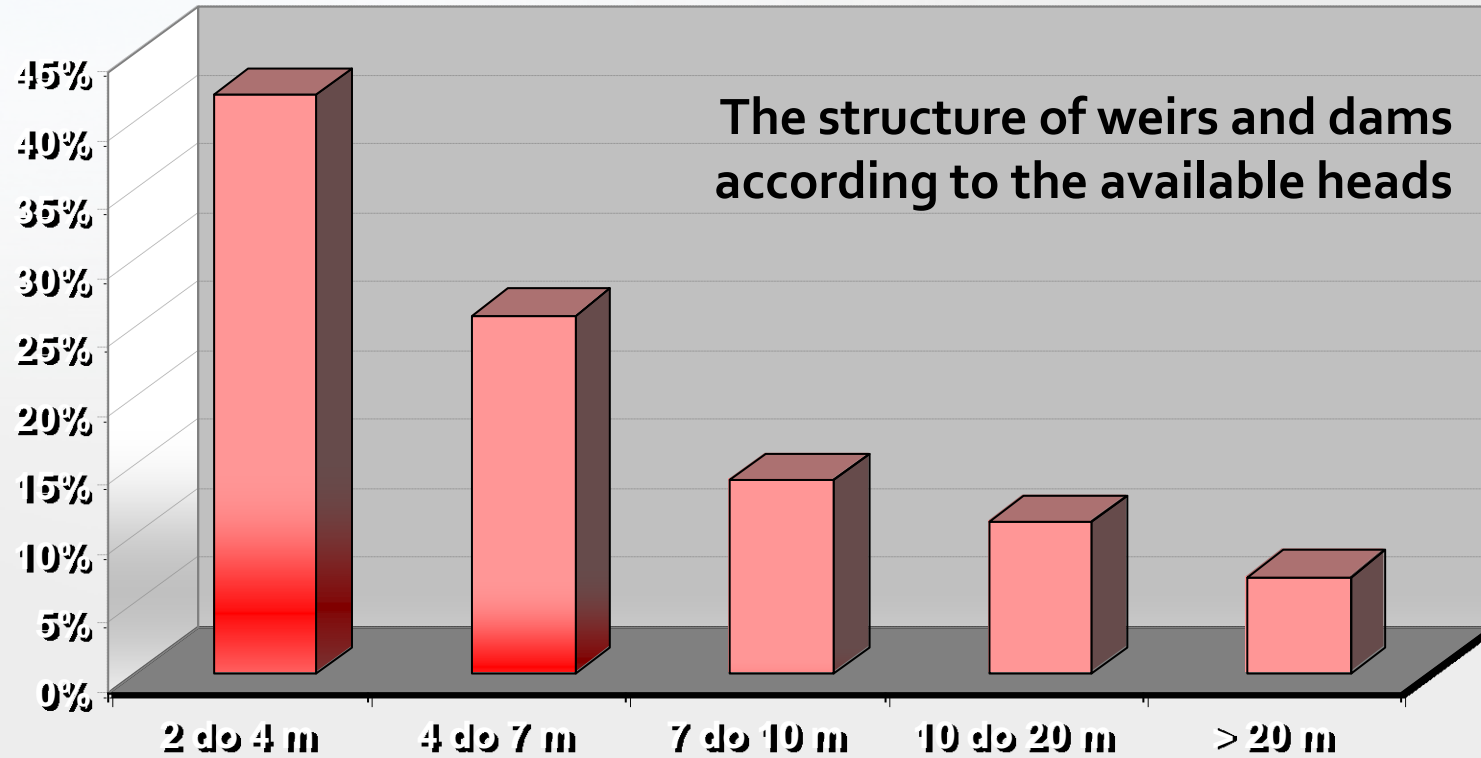
# New opportunities

- **Multipurpose projects**, including:
  - utilising the existing water barrages for hydropower purposes;
  - new projects under recently announced water management programme, including development of inland navigation routes.
- **Ancillary grid services**, including:
  - energy storage;
  - compensation of grid parameter fluctuations introduced by intermittent electricity sources.

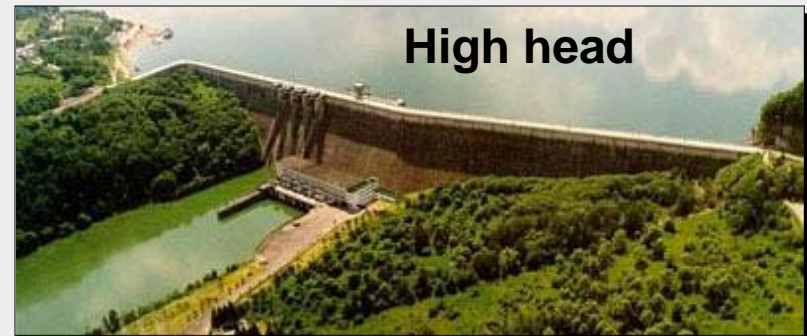
*The current situation in water and Energy sector and consequent EU policy may force political elites to continue supporting this development direction.*

# Opportunities

- installations at existing low-head weirs



Low head







## Opportunities

- installations at existing low-head weirs

*Most new SHPs are erected at the existing weirs.*

Low head weirs in administration of Water Management Authorities (RZGW) provide raw capacity of up to 3 MW.



# Opportunities - flood protection

**EW Niedzica**  
- „Millennium water” in July 1997  
**Flattening of the flood wave**  
by the Niedzica Dam





# Opportunities inland navigation routes

ECE/TRANS/120/Rev.4

ECONOMIC COMMISSION FOR EUROPE  
INLAND TRANSPORT COMMITTEE

EUROPEAN AGREEMENT ON MAIN INLAND WATERWAYS  
OF INTERNATIONAL IMPORTANCE (AGN)

DONE AT GENEVA ON 19 JANUARY 1996

ACCORD EUROPÉEN SUR LES GRANDES VOIES NAVIGABLES  
D'IMPORTANCE INTERNATIONALE (AGN)

EN DATE, À GENÈVE, DU 19 JANVIER 1996

ЕВРОПЕЙСКОЕ СОГЛАШЕНИЕ О ВАЖНЕЙШИХ ВНУТРЕННИХ  
ВОДНЫХ ПУТЯХ МЕЖДУНАРОДНОГО ЗНАЧЕНИЯ (СМВП)

СОВЕРШЕНО В ЖЕНЕВЕ 19 ЯНВАРЯ 1996 ГОДА

*Poland joined the agreement in 2017.*



UNITED NATIONS  
ОРГАНИЗАЦИЯ ОБЪЕДИНЕННЫХ НАЦИЙ

NATIONS UNIES

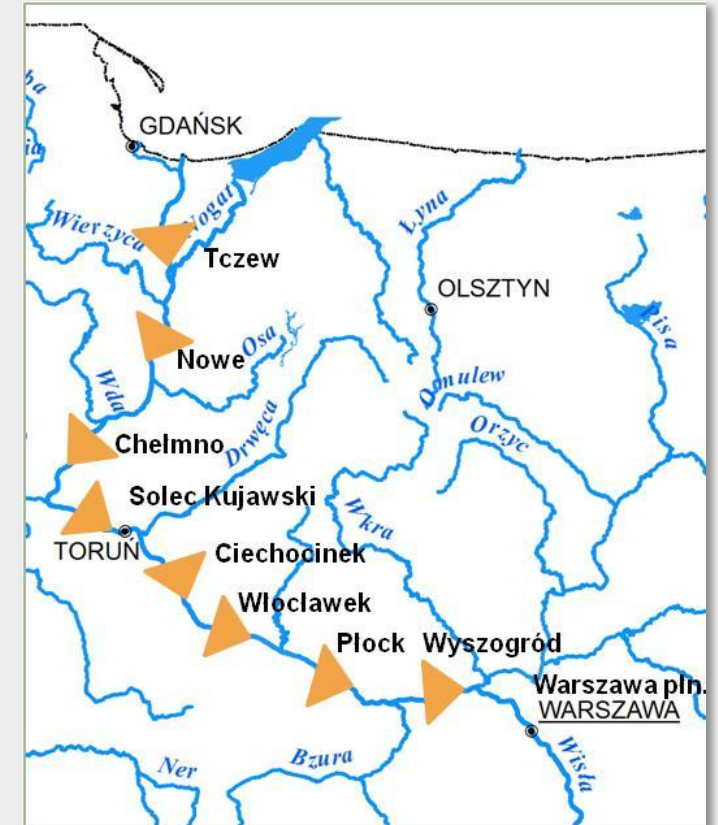
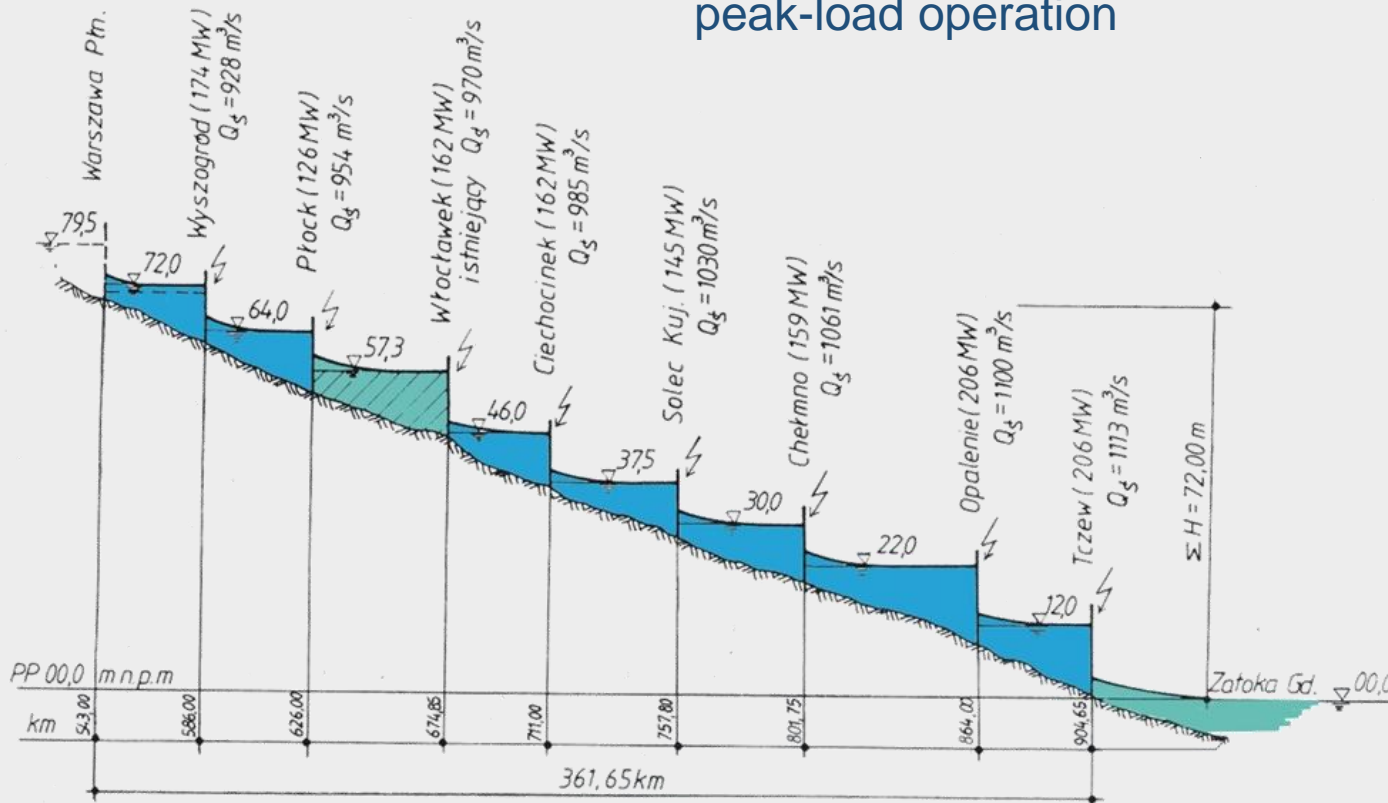


# Opportunities

## Large hydro projects

### Lower Vistula Cascade (1980)

installed power: 1340 MW  
annual production: 4300 GWh  
peak-load operation



### Recently (2016)

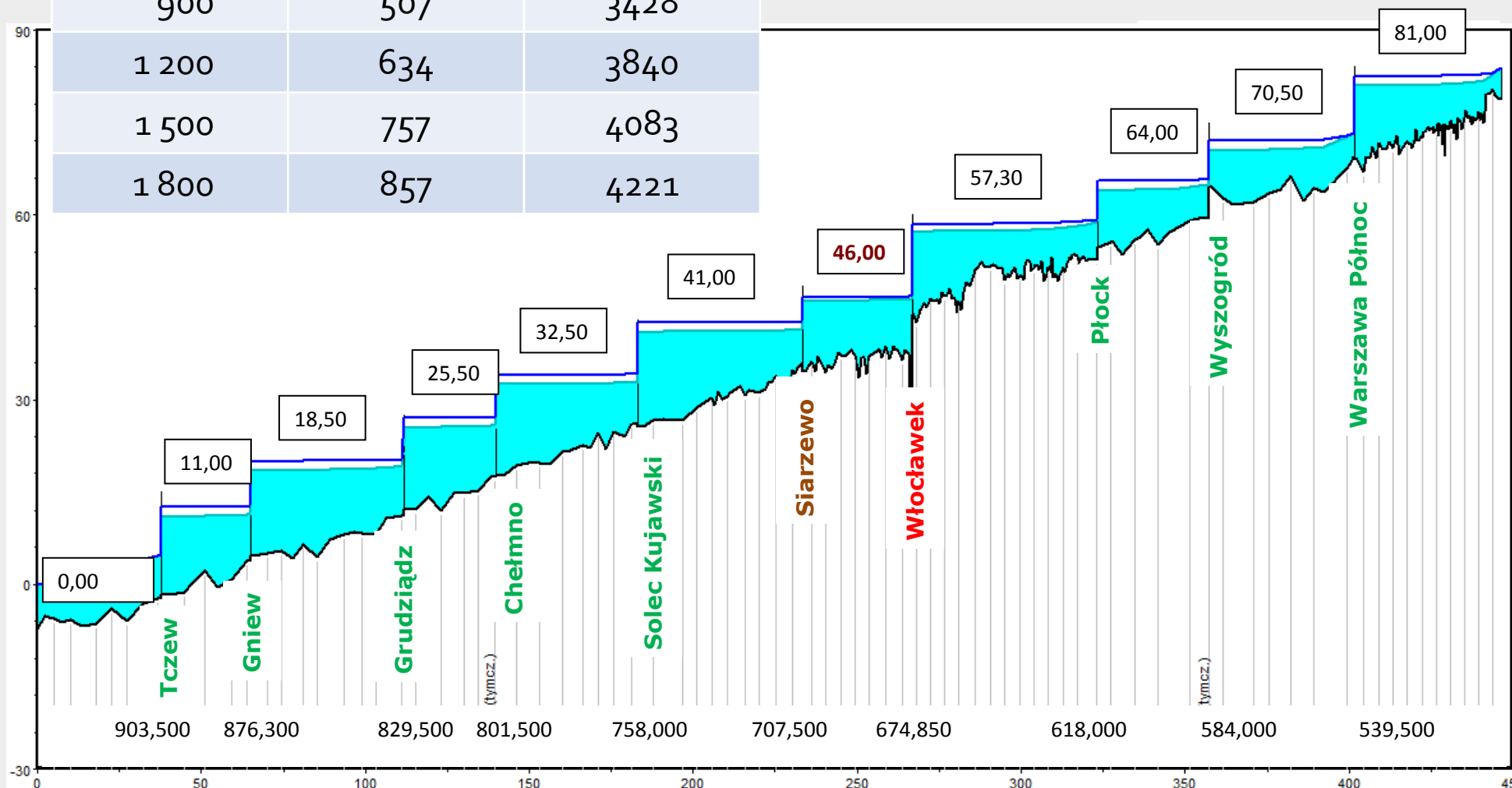
installed power 857 MW  
annual generation 4200 GWh



Discharge	Capacity	Generation
$Q_{\max}, \text{ m}^3/\text{s}$	$P_{\max}, \text{ MW}$	$E, \text{ GWh}$
900	507	3428
1 200	634	3840
1 500	757	4083
1 800	857	4221

# Opportunities

Lower Vistula cascade:  
options under consideration (2017)



# Socio-economic impact of the development of the lower Vistula



Direct energy  
related profit  
- only 12-14 %  
of the total one!

Krystyna Wojewódzka-Król  
Ryszard Rolbiecki



**Economic Net Present Value in 30 years** **100,0 bill. zł;**

- increase of sea harbours revenue **40,7 bill. zł;**
- decrease of flood related losses **21,8 bill. zł;**
- increase of tourism profits **17,0 bill. zł;**
- increase of profits due to electricity generation **9,7 bill. zł;**
- decrease of drought losses in agriculture **7,3 bill. zł;**

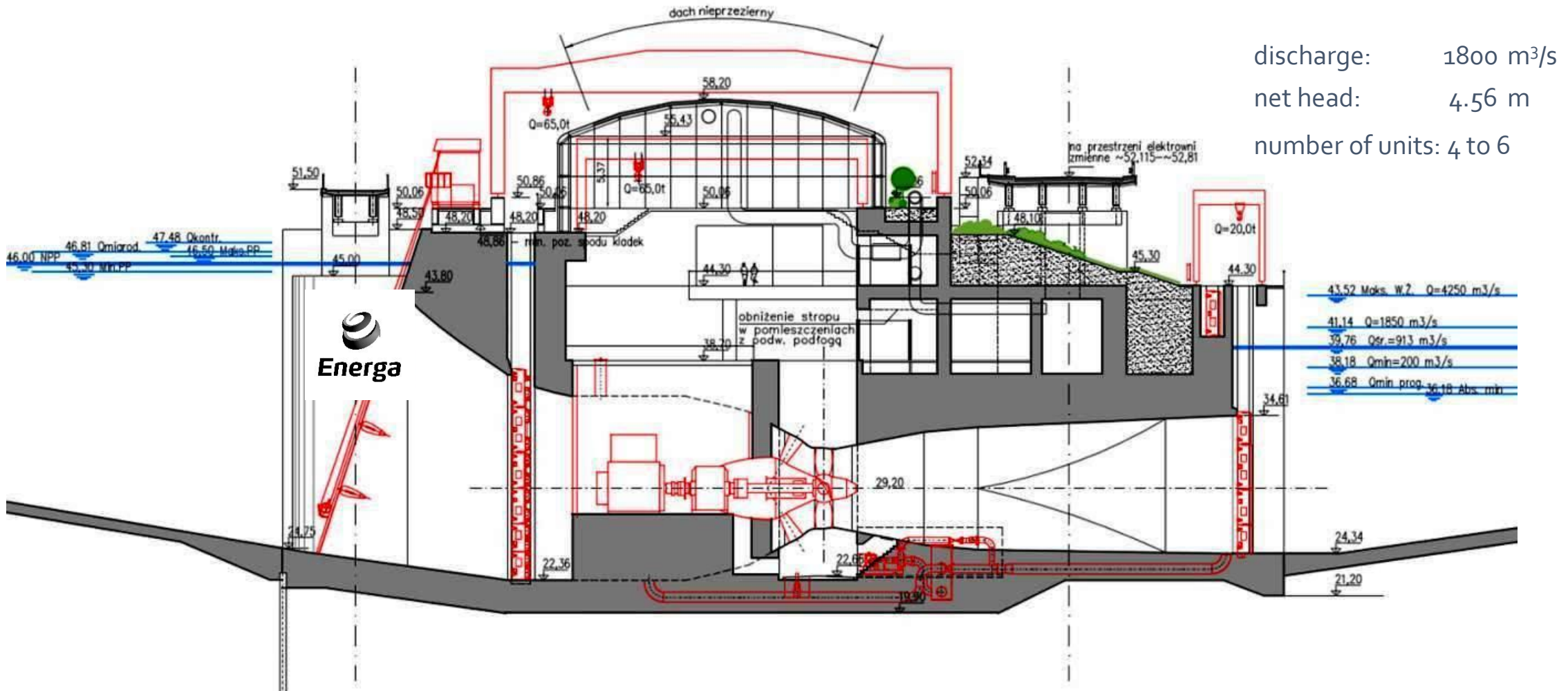
**1 EUR = 4,3 PLN (zł)**

## Main quantitative profits



# Opportunities

## Siarzewo Dam in the Lower Vistula cascade – one of concepts







## Lower Vistula Cascade

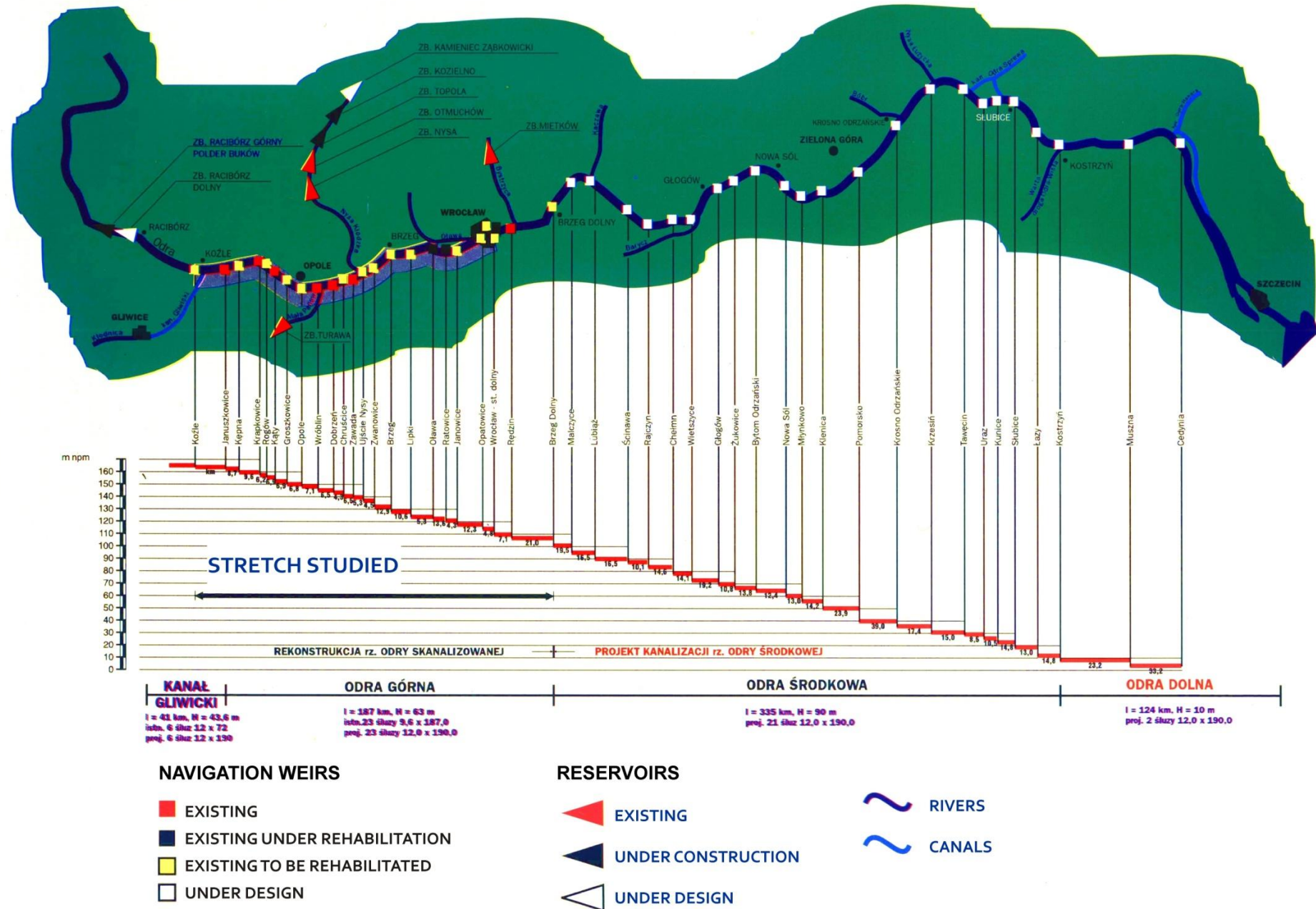
Siarzewo Dam & Power Plant: 70÷90 MW

environmental consent granted in the end of 2017



# Development of Oder river according to the Oder 2006 roadmap

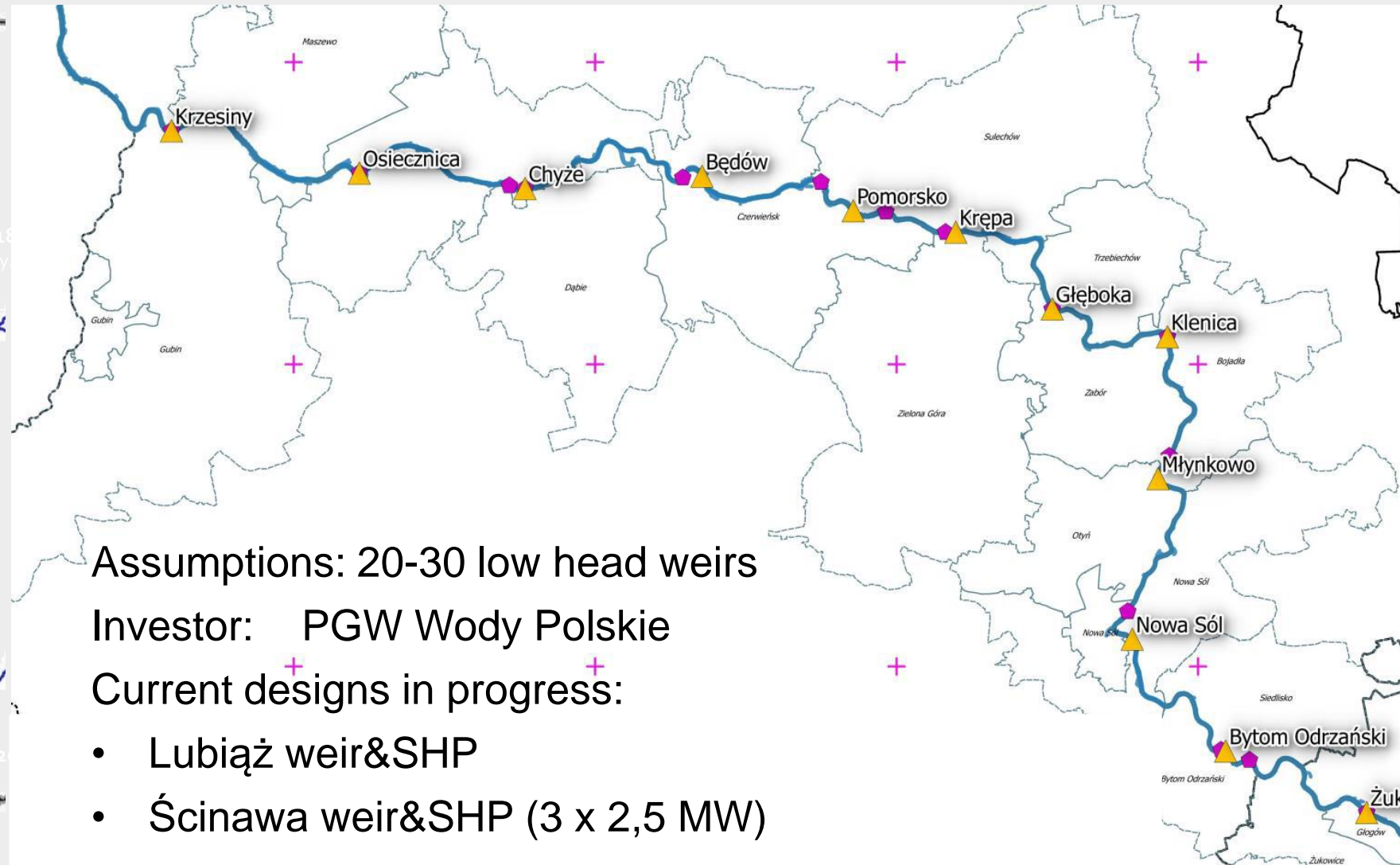
## Opportunities





# Opportunities

Development of Oder Inland Navigation Route  
according to the plans of the Ministry of Maritime Economy and Inland Navigation

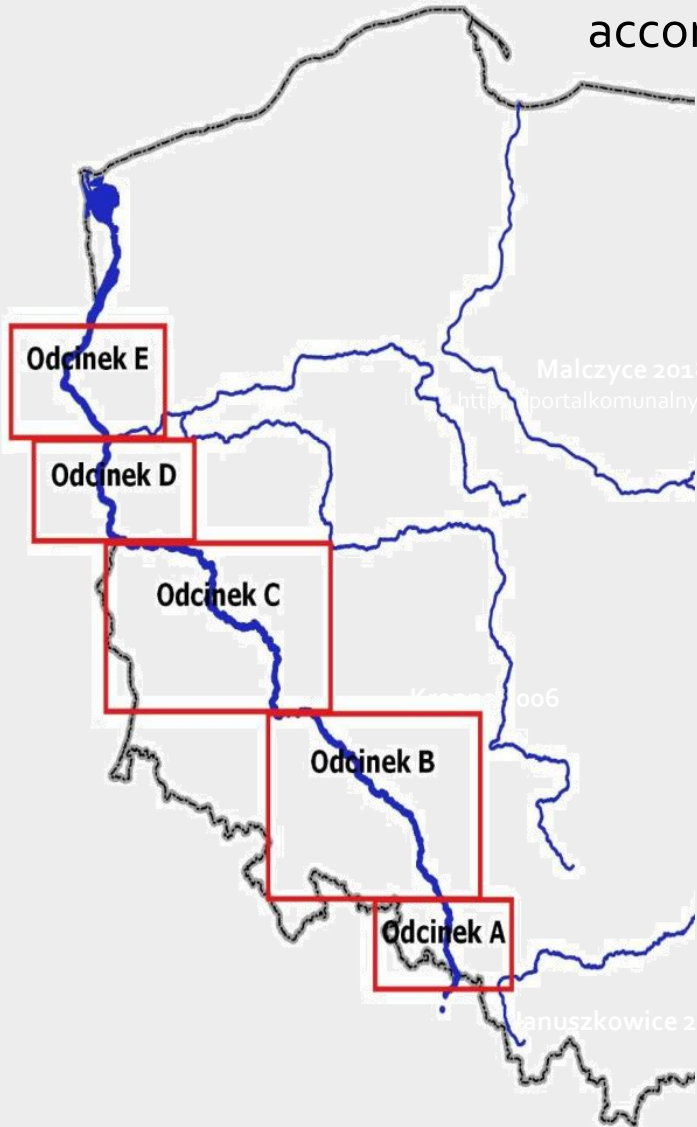


Assumptions: 20-30 low head weirs

Investor: PGW Wody Polskie

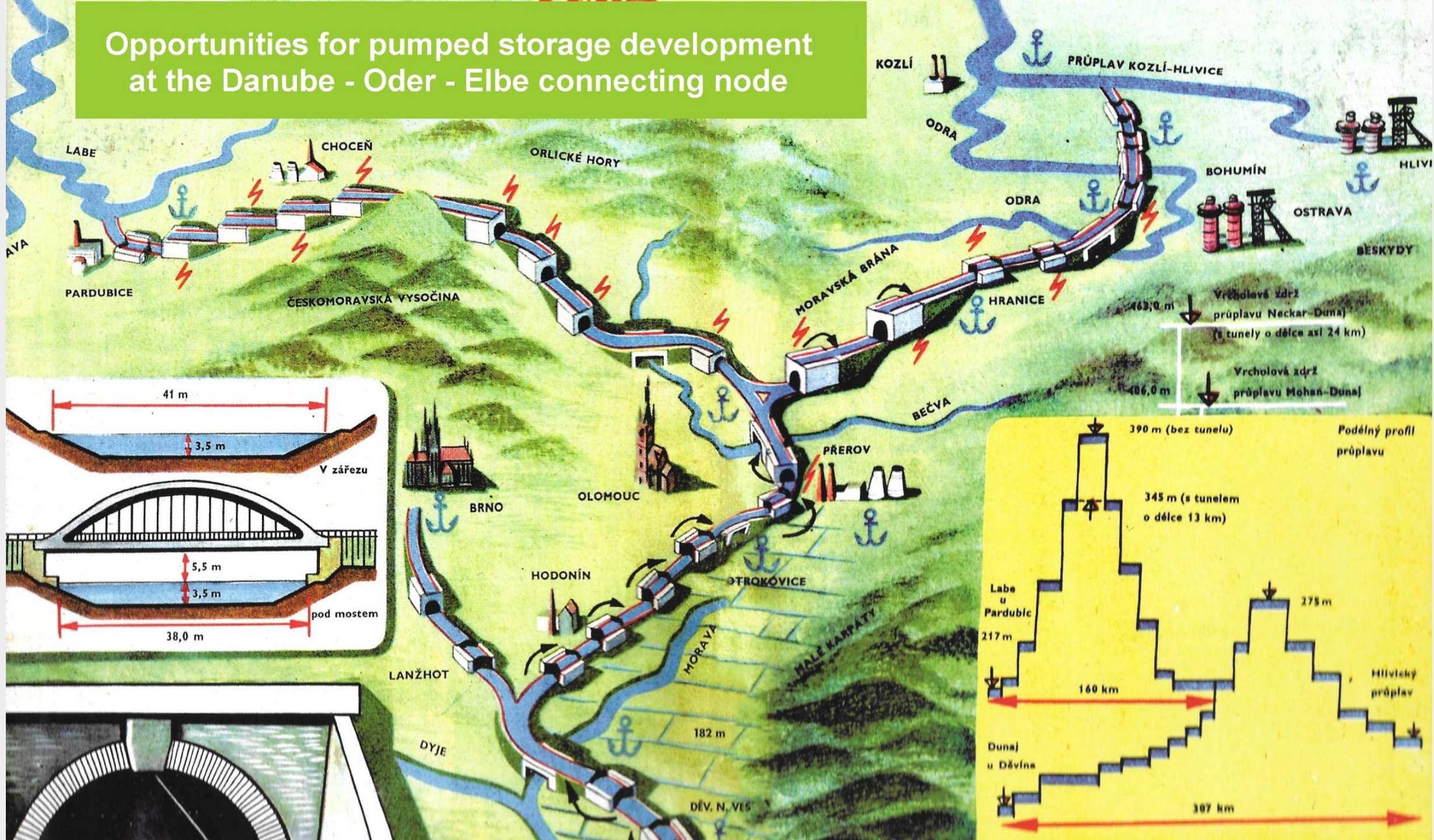
Current designs in progress:

- Lubiąż weir&SHP
- Ścinawa weir&SHP (3 x 2,5 MW)





# Opportunities for pumped storage development at the Danube - Oder - Elbe connecting node





# Opportunities

## Investment memorandum of the Wroclaw Regional Water Management Authority

River	No. of plants	Capacity kW	Annual generation, MWh
Bóbr	4	1500	6 930
Bystrzyca	5	576	3 055
Kwisa	6	870	3 915
Nysa Kłodzka	4	1510	8 050
Oder	5	4987	29 403
others	4	149	924
<b>Total</b>	<b>28</b>	<b>9 592</b>	<b>52 276</b>



Januszkow



## Other projects studied

- Kadyňny Pumped Storage Plant (PGE)
- Pumped storage  
using excavated lignite mine caverns
- Pumped storage in abandoned coal mines
- Other pumped storage locations

*Existing opportunities are often disregarded by the policy-makers  
both in their activities and public statements.*



## Key message

- Poland has lost several decades and experience of its specialists after stopping development of its hydropower sector in the beginning of 80-ies and allowing to restore merely the SHP sector later on.
- The contemporary challenges, and especially the climate change with all its consequences require much higher attention to be paid to the water and energy storage and management.





Solina Dam (82 m) and Power Plant (200 MW)

*Thank you for your attention!*