ELWIND

CLOSER TO LATVIA'S FIRST OFFSHORE WIND PARK

2025

MISSION Latvia

Energy independence, economic growth and climate neutrality are not just slogans – they are concrete objectives that will determine Latvia's competitiveness in the future. This is why offshore wind energy is becoming a strategic solution, capable of simultaneously strengthening the national economy and reducing dependence on imported energy resources.

In 2025, the Investment and Development Agency of Latvia (LIAA) conducted several public opinion surveys, and the results confirm that an increasing number of residents see offshore wind energy as a long-term benefit for the country. This technology ensures more stable electricity generation throughout the year, higher efficiency, and a significant opportunity to diversify Latvia's energy mix. This means not only a more secure energy system, but also more stable electricity prices and new jobs in the regions.

The Latvian–Estonian joint project ELWIND is one of the most significant steps toward achieving this goal. It lays the foundation for long-term development – from the modernisation of ports and electricity grids to the growth of new competencies and industries in Latvia.

The year 2025 has also been particularly important from a research perspective. During this period, several Environmental Impact Assessment and technical studies were launched, which will provide Latvia with an unprecedented volume of data on the Baltic Sea environment, seabed conditions, biodiversity, and technical possibilities. These data will serve as a scientifically grounded basis for responsible policy decisions and the sustainable planning of offshore wind energy.

Offshore wind energy is not merely a future opportunity – it is a deliberate choice in favour of a secure, competitive, and modern Latvia.

Laura Štrovalde
Deputy Director of the LIAA – Director of the
Investment Promotion and Business
Development Department

About ELWIND

ELWIND is a cross-border project between Latvia and Estonia for the construction of an offshore wind park in the Baltic Sea. It is an ambitious and environmentally friendly renewable energy project with a total capacity of up to 2 GW across both wind parks.

The pre-development phase of the ELWIND project is scheduled to be completed by 2029, culminating in a planned auction, where the rights to use the offshore wind area will be awarded to a qualified developer. The offshore wind park is expected to be built and operational by 2035.

ELWIND Development Roadmap

2020–2022

Signing of the Memorandum of Understanding between the Ministry of Economics of the Republic of Latvia and the Ministry of Economic Affairs and Communications of the Republic of Estonia to initiate cooperation and select project areas.

2023

Submission of the project application to the Connecting Europe Facility (CEF) program, initiation of the Environmental Impact Assessment (EIA) process, and preparation of procurement documentation for necessary studies.

2024–2028

Carrying out the EIA and technical studies and preparing the auction terms and conditions.

2029

Auction of the offshore wind park area.

2030–2035

Construction of the wind park, establishment of grid connections, and commissioning.

Wind Energy Sector

20 %
of total electricity generated in Europe **comes from wind energy** [1]

By mid-2025, Europe's total installed **wind power capacity** reached

291 GW

254 GW
onshore

37 GW
offshore [2]

The offshore wind sector provides employment for approximately **100,000** [3] people

The onshore wind energy sector provides employment for approximately **343,000** people

By 2030, total employment in the **wind energy sector is expected to increase** from **443,000** to **600,000** [4]

A single offshore wind turbine can generate enough electricity to supply **16,000** households [3]

In 2025, Latvia's total installed wind power capacity stands at **137 MW**

Estonia
711 MW

Lithuania
1,893 MW

[1] Wind Energy Association Latvia, https://ej.uz/WEANozare
[2] WindEurope 2030 Outlook", https://ej.uz/WindEuropeDati
[3] "WindEurope", https://ej.uz/WindEuropePeril
[4] "Europe's Wind Energy Workforce Report", https://ej.uz/WindEuropeDarbaspeks

The Potential Impact of ELWIND on the Latvian Economy

Workforce

ELWIND has the potential to create a significant number of new jobs during both the construction and operational phases. The highest demand for workforce is expected during construction, with approximately 375 jobs projected.[5] Around 150 additional jobs could be created during the electricity generation phase, which is expected to last at least 25 years.

Well-paid jobs will be created in Latvia, especially along the Kurzeme coast, in sectors such as energy efficiency, transport and logistics, wind turbine maintenance, energy supply and storage.

[5] "Guidance on assessing the socio-economic impacts of offshore wind farms", https://ej.uz/vattenfalldati

Opportunities for New Businesses

ELWIND can stimulate Latvia's economy and encourage the establishment of new businesses through the development of the offshore wind park. The project will foster the creation of new products and services in areas such as:

- wind turbine maintenance, monitoring, and cybersecurity,
- new technologies for the production, storage, and transportation of hydrogen products,
- energy storage and accumulation technologies, including the development of battery solutions.

Attracted Investments

In addition to direct investments in the project itself, ELWIND can serve as a catalyst for further investment in the region. A large-scale renewable energy project can stimulate related industries, such as the production of hydrogen products and green ammonia, sustainable aviation fuel (SAF), the development of data centres, as well as the establishment of energy-intensive manufacturing facilities.

Development of Local Supply Chains

The ELWIND project can promote sustainable economic growth by developing local supply chains. To support the project's needs – including logistics, design and engineering services, the supply of locally sourced materials, construction works, and other activities – the involvement of local businesses will be essential.

According to calculations available to LIAA, local supply chain participation – meaning the involvement of domestic resources in the project – could account for approximately 12% of total investments. The overall benefit to local suppliers during the wind park's construction phase and 25 years of operation could reach around **EUR 915 million, while additional tax revenues for Latvia could amount to approximately EUR 344 million.**

Research and Development

ELWIND can stimulate research and development (R&D) projects, driving technological advancements in the renewable energy sector. It opens up broad opportunities for marine and maritime technology research, the expansion of scientific institutions' activities, and the creation of industry start-ups.

Education, Training, and Educational Programs

To encourage greater involvement of the local community and workforce, Latvian educational institutions already offer training in skills and professions required for wind farm construction and maintenance, including wind turbine mechanics and technicians, renewable energy specialists, programmers, smart electrical engineering experts, environmental engineers, robotics specialists, and more.

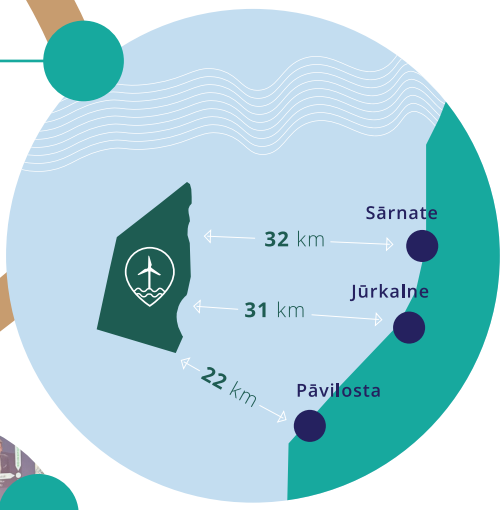
Enhanced Energy Security

ELWIND will help ensure stable and affordable electricity prices for households and businesses by diversifying electricity generation sources and strengthening the country's energy independence.

Overview of ELWIND Project Activities in 2025

February

The Cabinet of Ministers approves a 200 km² offshore research area for the ELWIND wind park, where LIAA will carry out the studies necessary for the project's pre-development phase.



March

An ELWIND representative speaks at a panel discussion during the Baltic Sea *Offshore Wind Summit* in Gdańsk, sharing Latvia's experience and exploring the opportunities that offshore wind supply chain development offers to countries around the Baltic Sea.

At the beginning of 2025, a survey was conducted on Latvian residents' attitudes toward offshore wind parks and the plan to build an offshore wind park in Kurzeme.

In a survey carried out by *Norstat Latvia*, 62% of respondents indicated that they support or rather support the development of wind energy in Latvia through the establishment of wind park. Overall, 70% believe that the sea is fully or rather suitable for the development of wind energy parks. Read more: https://ej.uz/elwindaptauja2025eng

70 % % Latvian population consider the sea to be the best place for wind parks.

28 % Definitely support

12 % Definitely don't

10 % Hard to say

42 % Rather support

7 % Rather not support

ELWIND signs a contract with the Polish company *3Bird* to study the potential impact of the offshore wind park on bats.

The aim of the study is to determine whether bats are present in the open sea, how frequently and during which seasonal periods they occur, and how they may coexist with the ELWIND wind park.

The first phase of the study was carried out in both Estonian and Latvian territorial waters from 1 May to 20 September 2025, covering both offshore wind park areas and a 4 km buffer zone around them.

Observations indicate that bats appear mainly on a seasonal basis – during spring migration and with the highest activity in autumn, particularly under favourable weather conditions (warm, calm nights).

April

ELWIND participates in the annual *WindEurope 2025* conference, where it is recognised that defence is a priority area in which wind energy plays an important role in strengthening Latvia's security and energy independence.

During meetings with industry investors, existing and future partners, as well as other visitors at the project stand, LIAA emphasises that the Baltic region is attracting increasing investor attention – a promising sign for the further development of offshore wind energy.

The conference *WindWorks. Powering Economy 2025*, powered by LIAA, takes place in Riga. The event brings together the Baltic States for joint discussions and cooperation, providing a platform to explore the future of wind energy.

The ELWIND team participates in the conference, takes part in a panel discussion on offshore wind energy, and presents the project to various delegations, industry professionals, and stakeholders.

May

ELWIND signs a contract with *Workboats Consulting OÜ* to conduct bird studies in Latvian territory. The research is being carried out in cooperation with the German company *BioConsult* and the Estonian Ornithological Society.

The study consists of several survey components: data collection on bird species and their activity within the ELWIND areas, as well as radar surveys analysing seasonal patterns in bird flight intensity.

The objective of the observations in Latvia is to identify seasonal species, their abundance, and flight characteristics, providing essential data for the EIA process. The surveys fulfil nature protection requirements and generate data to support impact mitigation and monitoring measures in the subsequent phases of the ELWIND project.

The data collected will allow conclusions to be drawn regarding the species present, their numbers, seasonal variations, and flight patterns – including flight altitudes and whether birds pass through the rotor-swept area of the planned wind turbines. The study will be completed at the end of 2027.

June

A seminar dedicated to European Maritime Day, *Marine environmental research on the Latvian coast and marine waters*, takes place in Riga. During the event, the ELWIND Project Manager provides an overview of the upcoming environmental studies within the project and discusses their potential broader impact on research in the Baltic Sea.

ELWIND participates in the international conference *Seaenergy 2025* in Paris, where the Deputy Director of LIAA, Laura Štrovalde, highlights the Baltic Sea's potential for offshore wind development. She emphasises that an attractive environment has been created for investors to implement energy-intensive projects, supported by a clear regulatory framework, favourable conditions for port development, and the establishment of "green" corridors.

August

ELWIND signs a contract with the Latvian Institute of Aquatic Ecology (LHEI) to carry out a Benthic ecology study and a suspended particles and water quality study.

The benthic ecology study within the ELWIND offshore wind park area will identify seabed habitats and benthic communities, assessing the potential impact of the planned infrastructure on the ecosystem, including the possible "reef effect." Meanwhile, the suspended particles and water quality study will analyse the dispersion of particles caused by seabed disturbance and their impact on the physical and chemical parameters of the water. The studies are scheduled to be completed in spring 2027.

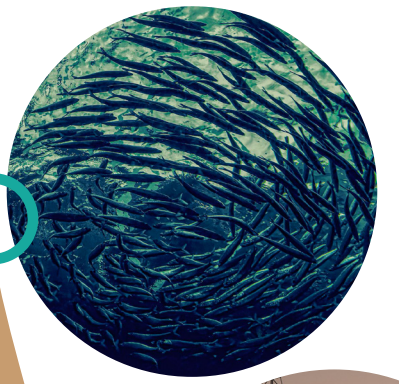
September

The geophysical survey of the ELWIND wind park territories has begun and is being carried out by the Belgian company *G-TEC*. This is a comprehensive seabed investigation aimed at obtaining data for the development and design of the offshore wind park.

The main objectives of the survey are to gain an accurate understanding of seabed conditions, the geological environment, and soil properties essential for foundation design; to identify natural features and unpredictable seabed conditions; to map the seabed environment; to obtain data for optimizing geotechnical investigations; and to reduce design risks. The study is scheduled to be completed in spring 2027.

ELWIND team attends the 8th *Conference on Wind energy and Wildlife impacts (CWW 2025)* in Montpellier, France. The conference brings together experts from the fields of energy, ecology, and nature conservation to explore how renewable energy can be responsibly expanded while protecting biodiversity.

ELWIND signs a contract with the Scientific Institute of Food Safety, Animal Health and Environment *BIOR* to conduct a fish and fisheries study. The study will identify fish species, their seasonal distribution, and their significance within the specific project area. The research will continue until early 2028.



ELWIND signs a contract with *Haskoning Nederland B.V.* to determine and assess potential grid connection points, identify cable routes, and conduct a grid configuration study.

The company will carry out a qualified technical and legal assessment of possible electricity grid connection points, as well as identify potential cable routes and their lengths, taking into account potential risks and constraints related to cable installation.

ELWIND signs a contract with *EOLOS Floating Lidar Solutions S.L.* to carry out meteorological and marine measurements in the Estonian and Latvian wind park areas until spring 2027.

The purpose of the measurements is to provide accurate and validated data on meteorological and oceanographic conditions within the respective ELWIND offshore wind park territories.

October

ELWIND signs a contract with *Geoprovider AS* to conduct a review of meteorological, geological, unexploded ordnance, and archaeological documentation. *Geoprovider AS* is carrying out the study within the Latvian territory of the ELWIND project, analysing available literature and other data sources.

ELWIND Project Manager participates in the *LIFE REEF* conference in Liepāja, titled “The Future of Marine Spatial Conservation: From Science to Policy,” which focuses on advancing marine conservation across Europe.

Participants were introduced to ELWIND’s approach – seeking a balance between offshore wind development and marine biodiversity. The project representative also took part in the closing panel discussion on stakeholder engagement and sustainable planning.

November

ELWIND team visits the Faculty of Law at the University of Bergen to discuss the pre-development phase of the joint Estonian–Latvian cross-border offshore wind project and the legal framework supporting offshore wind development in both countries.

Participants were introduced to the project's progress, key challenges, and recent legal developments in Latvia and Estonia aimed at ensuring compliance with EU regulations.

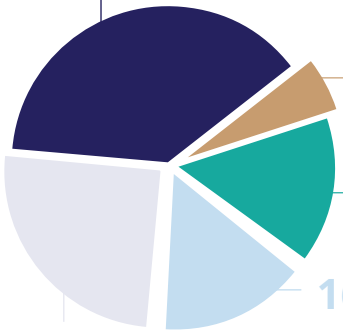
In November, with the support of the Netherlands Enterprise Agency (RVO) and the Embassy of the Netherlands, ELWIND team attends the *Offshore Energy Exhibition & Conference 2025* in Amsterdam to gain insights into how the Netherlands is shaping its offshore wind strategy, promoting marine biodiversity and circular economy principles in offshore wind farms, and addressing other key sector issues.

In November 2025, an omnibus survey was conducted to assess Latvian residents' views on the benefits of an offshore wind farm. 25% of Latvian residents believe that an offshore wind park would provide greater economic benefits for Latvia (compared to 9% for an onshore wind park).

Meanwhile, 43% would support the development of an offshore wind park along the Kurzeme coast if the benefits were shared by society as a whole.

The survey results also show that 42% of Latvian residents would feel proud if Latvia surpassed its neighbours – Lithuania and Estonia – in wind energy production. Read more: https://ej.uz/elwindomnibuss2025eng

43 % of Latvian residents would support the development of an offshore wind park on the Kurzeme coast if it **benefited society as a whole**



6 % if it would benefit their **municipality**

17 % if it would benefit the **country**

16 % if it would benefit them or their **family**

31 % hard to say

25 % of Latvian residents believe that an **offshore wind park** would bring greater economic benefits for Latvia.

9 % of Latvian residents believe that an **onshore wind park** would bring greater economic benefits for Latvia.

ELWIND

Project Developers

https://www.liaa.gov.lv/en

Investment and Development Agency of Latvia

https://kik.ee/en

ENVIRONMENTAL INVESTMENT CENTRE

Learn more at
www.elwindoffshore.eu

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