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Renewable energy (RE) market potential

Technology	Connection capacity, 1 January 2025	Projected capacity, 2035	Development potential
SOLAR	906.7 MW	5,465 MW	+4,558.3 MW (about ×6)
WIND	1,232 MW	2,284 MW	+1,052 MW (about ×1.9)
HYDROPOWER	2,143 MW	2,307 MW	+164 MW (about ×1.08)
BIOMASS	102 MW	102 MW	No change
BIOGAS	No separate row in the 2025 table	62 MW	n/a
GEOTHERMAL	10 MW	128 MW	+118 MW (about ×12.8)
Total renewables	**about 4,394 MW**	**about 10,348 MW**	**+5,954 MW (about ×2.4)**



Principal focus:



Grid access

- Grid access is becoming one of the most valuable assets in the energy sector
- New tools to manage grid connection (flexible grid connection agreements)
- Tighter requirements to deter speculative projects

Energy storage

- Critical system assets capable of improving grid utilisation
- Dedicated investment support scheme already existing
- Dedicated operational support scheme is in pipeline
- By 2030, 1,620 MW at 17 locations chosen by the study's model, plus 854 MW at sites that already hold energy approvals

Accelerated permitting

- Changes in law expected in 2026/2027 to accelerate permitting
- Coordinated mapping for the deployment of renewable energy
- Creation of „go-to" zones (renewables acceleration areas)
- Creation of a single contact point during the entire permit-application and permit granting procedure

Principal focus:



Offshore wind

- A total offshore wind capacity of 17 GW
- Initailly three potential locations were considered
- A spatial plan for the Exclusive Economic Zone (EEZ) enacted in June 2026 rejected the posibility of offshore wind pharms in Adriatic.

Nuclear

- A specific nuclear energy dedicated law enacted in May 2026
- 30% of all electricity by 2040 should come from nuclear sources
- a Working Group for Nuclear Energy tasked with preparing studies on potential types and locations for nuclear units in the country

New grid infrastructure

- A new 400 kV transmission line running from south to north
- A new 400 kV infrastructructure and connection points
- Expected around 2040



How to Navigate the Development of Renewable Energy Projects in Croatia

Where to connect:
distribution vs. transmission



Distribution – HEP ODS

- **Operator**: Croatian distribution system operator (HEP ODS)
- **Voltage**: MV 10, 20, 30 and 35 kV; LV 0.4 kV
- **Projects**: projects below 10 MW – growing number of small and mid-scale renewables
- **Unit connection fee**: LV €193.00/kW; MV €106.00/kW

Transmission – HOPS

- **Operator**: Croatian transmission system operator (HOPS)
- **Voltage**: HV 110; VHV 220 and 400 kV
- **Projects**: all projects above 10 MW, incl. utility-scale solar and storage
- **Unit connection fee**: HV&VHV €19.00/kW

Practical notes

- **Up to 20 MW**: HOPS and HEP ODS may exceptionally agree a distribution connection
- **No private wires**: direct line or closed distribution system only with HERA approval
- **Fee calculation**: unit price × connection power; HERA unit prices of 27 April 2026

Securing the site:
land rights, spatial planning and EIA

Land rights

Rights in rem

- Ownership (Cro. *pravo vlasništva*)
- Building right (Cro. *pravo građenja*)
- Easements (Cro. *pravo služnosti*)

Contractual rights

- Lease (Cro. *zakup*) – common in early development

Spatial planning & environmental impact assessment

- Project must comply with the relevant spatial plans (national, regional, city/municipal and detailed-local level)
- Compliance confirmed by a spatial planning certificate from the planning authority
- No EIA without spatial plan compliance
- Environmental licensing comes first: EIA screening or full EIA, before the Energy Approval

Practical notes

- No formal land-rights requirement to reserve grid capacity
- Property-rights are typically secured before initiation of the construction stage

Permitting:
grid-related milestones

Energy Approval

1

- Issued by the Ministry of Economy, with or without tender
- Not required for simple construction (Cro. *jednostavne građevine*)
- Must be valid when requesting EOTRP data
- Valid max. 7 years – use permit needed within that period

EOTRP

2

- The Study of the Optimal Technical Connection Solution, which includes an estimate of the grid connection costs
- Prepared by a licensed third-party entity
- Network data request: 1–15 May only
- Operator issues the acceptability decision within 30 days

Grid Connection Agreement

3

- Governs all conditions for the grid connection (incl. deadline and the payment obligations)
- Reserves connection capacity
- Grid connection fee can be paid in instalments (HOPS: 50% / 40% / 10% – within 30 days of GCA, final location permit, final building permit)
- Security: 10% of EOTRP cost estimate (5% once fully paid)

EES

4

- Electro-energy consent: specific technical and connection conditions
- Used for location and building permits

Permitting:
construction and operation milestones



- Location permit first, based on the EES
- Main design confirmation (Cro. *potvrda glavnog projekta*) sufficient for simple constructions

- Request to the operator with proof of ownership and approved test programme
- HOPS: internal technical inspection within 45 days; HEP ODS: approved protection and grid-impact studies
- Concluded before energisation
- Offtake and balancing group arrangements before start of network use

- Start of network use, trial run and verification tests
- Operator's confirmation for permanent operation (HOPS: only once all fees paid; HEP ODS: within 30 days of final trial report)
- Use permit issued for an indefinite period

- Electricity production license issued by HERA – only after the use permit
- Issued within 30 – 60 days; valid up to 30 years
- Proof of technical, expert and financial capacity
- Separate storage licence if BESS

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