



18TH ENERGY COMMUNITY OIL FORUM

Beyond the Russian Grid

From Baltic Desynchronisation to Critical Energy Infrastructure Resilience

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From Strategic Dependence to Energy Independence

After EU accession, the Baltic power systems remained synchronously connected to the Soviet-designed IPS/UPS system.

THE SECURITY GAP

Frequency reserves and key transmission-control capabilities were outside the EU. Russia retained technical capacity to influence physical power flows.

9 FEBRUARY 2025

The Baltic States took full control of frequency management within the European system.



2007

Strategic direction



2019

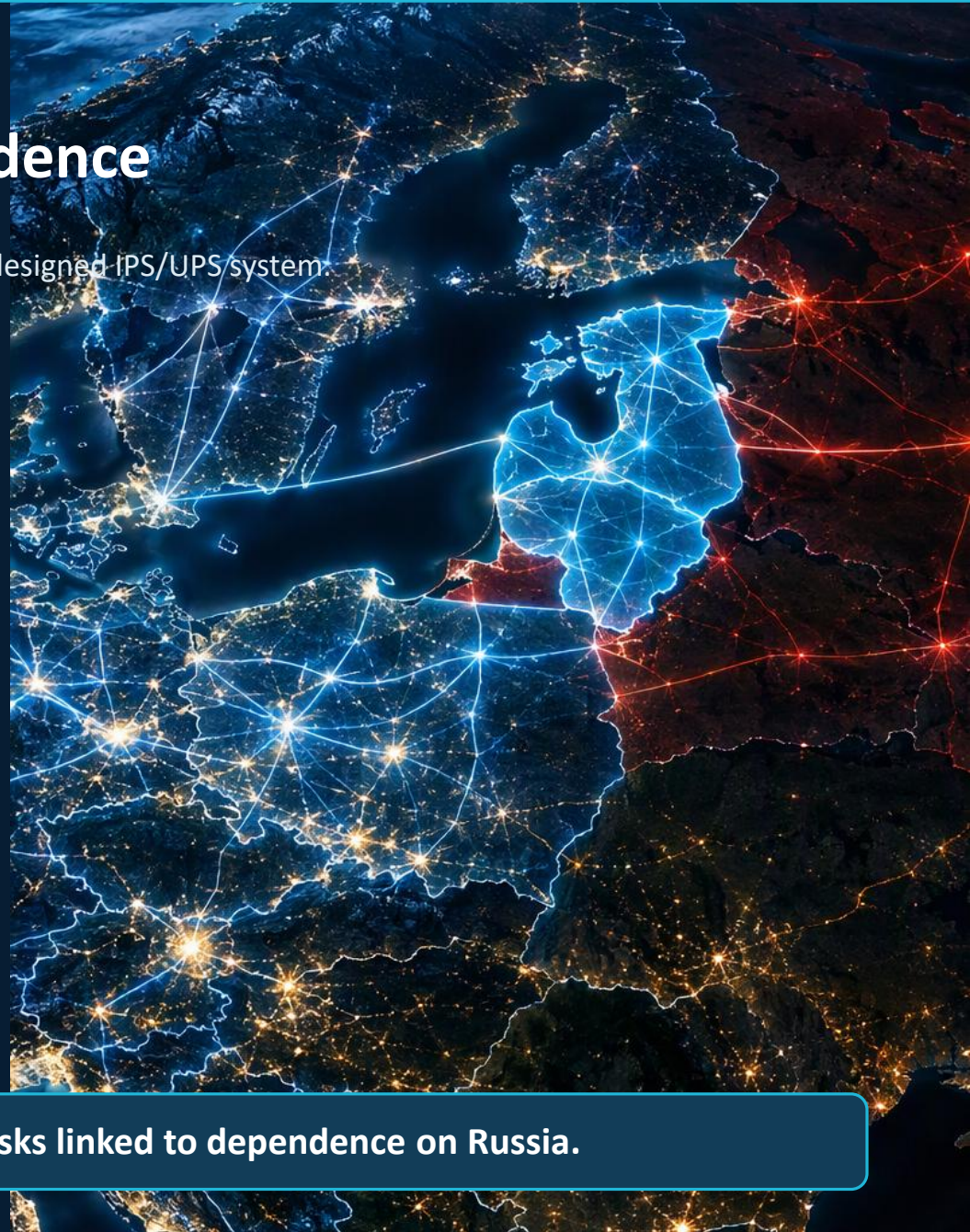
Connection Agreement



2025

Synchronisation completed

Desynchronisation reduced political, societal and economic risks linked to dependence on Russia.



Delivering a Megaproject Under Continuous Disruption

Interdependent delivery across four countries had to continue while the external environment kept changing.

DEPENDENT DELIVERY CHAIN

PLAN

PROCURE

BUILD

INTEGRATE & SYNCHRONISE

ONE PROGRAMME

PHYSICAL SYSTEM

STABILITY & CONTROL

JOINT GOVERNANCE

EXTERNAL SHOCKS

COVID-19

SUEZ DISRUPTION

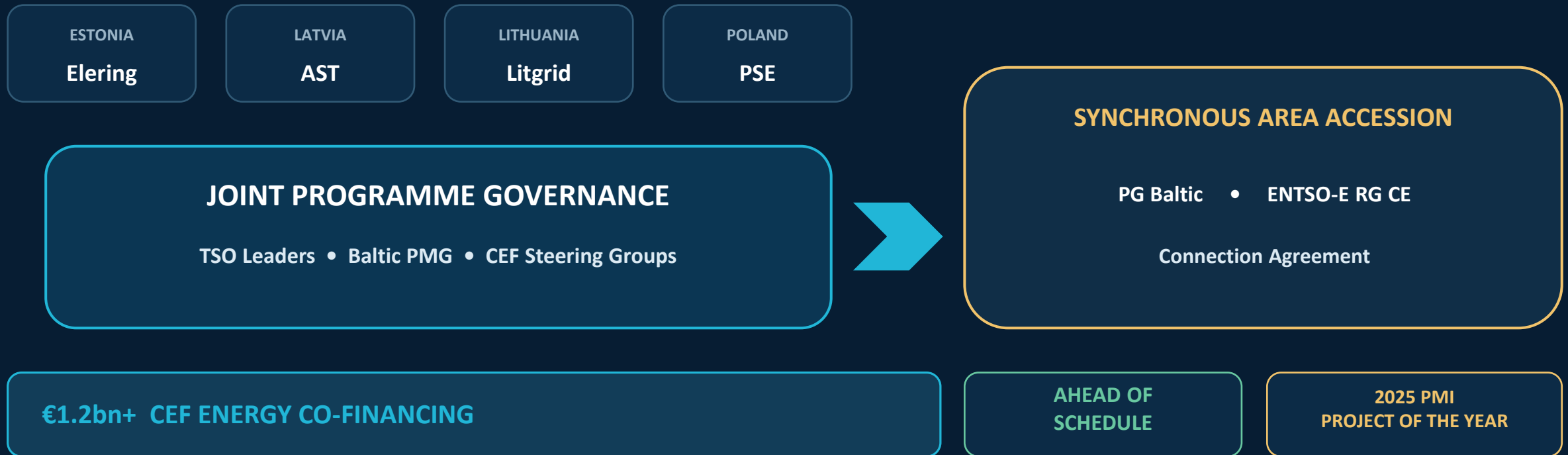
SUPPLY-CHAIN CRUNCH

WAR IN UKRAINE

Success depended on keeping the entire programme moving as one system.

One Programme. Four Countries. Four Independent TSOs.

A purpose-built governance model aligned delivery, European funding and Continental European accession requirements.



Independent organisations delivered one shared milestone through coordinated governance.

Europe Has Entered an Era of Persistent Hybrid Confrontation

Russia's hybrid campaign is intensifying while technology lowers the cost and threshold of attack.

ESCALATING INTENT

Sabotage • cyber • disruption

LOW-COST ACCESS

Drones • proxies • commercial tech

ACCELERATING CAPABILITY

AI • autonomy • scalable attacks

Attack is becoming cheaper, faster and more scalable. Protecting dispersed infrastructure is becoming more complex and expensive.

Persistent hybrid pressure requires a permanent resilience response.

The Resilience Gap Demands a Major Increase in Investment

Vulnerabilities must be reduced simultaneously at strategic and tactical levels.

STRATEGIC RESILIENCE

- REDUNDANT CORRIDORS
- DISTRIBUTED GENERATION
- FEWER SINGLE POINTS OF FAILURE
- STRATEGIC EQUIPMENT RESERVES
- CROSS-BORDER RECOVERY

TACTICAL PROTECTION

- HARDENED CRITICAL ASSETS
- MULTI-DOMAIN MONITORING
- COUNTER-UAV CAPABILITY
- RAPID-DEPLOYMENT PROTECTION
- TRAINED RESTORATION TEAMS

We cannot protect everything equally. We must invest where damage could become systemic failure.

Elering Is Investing Across the Full Resilience Cycle

A layered capability reduces the risk that local damage develops into systemic failure.

PROTECT

Harden critical nodes

DETECT

Monitor across domains

RECOVER

Restore rapidly

ADAPT

Update capability

€230m

CRISIS PREPAREDNESS & CIP

€51m

CEF CO-FINANCING

SYSTEMIC RESILIENCE

Prevent local damage from becoming systemic failure.

Resilience Must Become a Permanent Security Function

This is not a temporary investment programme. It is a lasting change in how critical infrastructure operators work.

PRIORITISE

Protect mission-critical functions first

PREPARE

Build restoration capability before the attack

PARTNER

Integrate operators with security and defence authorities

ADAPT

Continuously update technology, doctrine and investment

PERMANENT PREPAREDNESS

Critical infrastructure resilience is measured by our ability to withstand disruption and restore essential services.

Protection May Fail. Essential Services Must Not.

Build for disruption. Prepare for rapid recovery.

Thank you | Questions & discussion