



Moldova

Edition · March 2026

Frontier Market · Solar PV · Onshore Wind · BESS

EXECUTIVE SUMMARY

Moldova is emerging as a frontier renewable energy market, driven by structural dependence on energy imports, accelerating EU alignment, and early-stage regulatory development. Total installed renewable capacity reached 932.81 MW by end-October 2025 — solar-dominated at 72%, with wind at 26% — after a growth cycle that compressed several years of development into 18 months. The January 2025 energy crisis transformed renewable energy from policy aspiration to operational imperative. Pioneer positioning is available — but this is a structuring market, not a scale market.

MARKET AT A GLANCE

Installed RES	932.81 MW (end-Oct 2025): ~665 MW solar (72%), ~244 MW wind (26%)
First auction	Aug 2025: 165 MW across 11 projects; 15-yr fixed-price, Energocom offtaker
Round 2 (live)	~173 MW wind with mandatory BESS co-location; bids due March 2026
Wholesale market	OPEM exchange launched DAM 10 Dec 2025 — coupled to Romania's OPCOM

Strategic view

Moldova is not a mature renewable market — it is a strategic entry play. The fundamentals (structural import dependency, policy urgency, EU alignment, IFI financing access) are sound. The execution risks are real but manageable with the right structuring approach and on-the-ground intelligence.

This is the executive summary. The full report is shared directly.

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