

# CODE2

**Cogeneration Observatory  
and Dissemination Europe**



## *D2.4 First draft of final CHP roadmap* **PORTUGAL**

**May 2013**

*The South Western Europe CODE2 Region draft roadmap for non-pilot Member States.*

*The CODE2 Region 'South Western Europe' comprises the following Member States:  
France, Italy, Malta, Portugal, Spain.*



## Introduction

The draft Roadmap for the non-pilot Member State Portugal in the South Western Europe CODE2 Region is submitted separately. The following update covers the non-pilot Member States.

A three parts structure has been agreed for the roadmaps:

- 1) Where are we now? Background and situation of cogeneration in the Member State
- 2) What is possible? Cogeneration potential and market opportunities
- 3) How do we arrive there: the Roadmap

Following the South Western Europe CODE2 Region Workshop, the format and final content outline for the individual non-pilot Roadmaps will be finalised. All of the Roadmaps for the Region will be available in September 2014.

What follows gives an overview of the progress on the Roadmaps for non-pilot Member States in the Region following the structure of the final Roadmap.

## Chapter 1 - Where are we now? Background and situation of cogeneration in the Member State

### 1.1, 1.2, 1.3 Current status, Energy and Climate Strategy, Policy Development

Status of information gathering	<p>General literature review:</p> <ul style="list-style-type: none"><li>• MEID - Ministro da Economia, da Inovação e do Desenvolvimento IDAE:<ul style="list-style-type: none"><li>○ Plano Nacional de Ação para a Eficiência Energética 2013-2016 PNAEE 2016</li><li>○ Plano Nacional de Ação para as Energias Renováveis 2013-2020 PNAER 2020</li></ul></li><li>• ADENE Agencia para a Energia</li><li>• Decree -Law nº 23/2010 (25.03.2010)(Transposes Directive 2004/8/EC)</li></ul> <p>Discussion and documents exchange with</p> <ul style="list-style-type: none"><li>• Cogen Portugal</li></ul>
Significant gaps	No specific gaps were identified. More information is needed to assess the effects of the new legislation. The latter seems to have pushed for a change of tariffs that has made CHP not a profitable option anymore. It has also cut incentives for older plants
Planned actions	Mails and teleconference calls are foreseen in the near future so to better understand the current situation and to propose possible solutions

## 1.4 Awareness

Process of developing awareness assessment	Information gathering based on standard CODE2 awareness form
Status of analysis	Starting phase, a questionnaire has been addressed to the National CHP Association
Significant gaps	No relevant gaps encountered
Planned actions/key milestones	An experts list is being compiled in order to contact them by July

## 1.5 The economics of CHP

Process of developing economics assessment	Collection of energy data and economic assessment by CODE2 developed tool. Also, the current CHP market situation is being discussed
Status of analysis	Starting phase
Significant gaps	Updated data are missing, particularly regarding recent laws that heavily affect remuneration
Planned actions/key milestones	Further discussion with associations and experts is needed to draw a complete and updated picture

## 1.6 Barriers to CHP

Process of developing barriers assessment	Historic barriers' literature analysis
Status of analysis	Starting phase
Significant gaps	The economic crisis has widely changed the barriers panorama making recent plans challenging to fulfil
Planned actions/key milestones	Further discussion with associations and experts is needed to draw a complete and updated picture

# Chapter 2 - What is possible? Cogeneration and market opportunities

## 2.1 Market opportunities

Method of assessment of opportunities	Current potential assessment will be used, particularly: <ul style="list-style-type: none"><li>• PNAEE from the Ministry</li><li>• ADENE Energy survey</li></ul>
Progress to date	Still in an initial phase
Planned actions	Further discussion with associations and experts is needed to draw a complete and updated picture

## 2.2 Considering the framework of the EED

This section will be developed following the first Member State workshop and will be based on the regional pilot roadmap and the outputs from the workshops.

## Chapter 3 - How do we arrive there: the Roadmap

### 3.1 Overcoming existing barriers and creating a framework for action

Status	Starting phase
Planned actions	Further information gathering and discussions with experts on proposed actions and measures

### 3.2 Possible paths to growth

Status	Starting phase
Planned actions	Final conclusions and recommendations will be prepared at the end of the Road map process