



D2.4 First draft of final CHP roadmap **SPAIN**

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 Spain 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">• Ministerio de Industria, Energia y Turismo: La energia en Espana• IDAE: Plan for renewable energies 2011-2020• Royal Decrees 1/2012, 15/2012, 2/2013 about CHP• BCG: Assessment of Benefits Associated with CHP Development in Spain <p>Discussion and exchange documents with</p> <ul style="list-style-type: none">• Cogen Espana
Significant gaps	No specific gaps were identified. More information is needed to clarify and assess the effects of the new legislation. It regards tariffs, incentives and economic feasibility for building new plants as well as for restructuring old ones
Planned actions	Phone calls and a personal visit are planned for mid-July 2013. The objective is to gather missing data and to examine possible modifications of energy plans in Spain

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 COGEN Association
Significant gaps	Not identified yet
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
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 completely changed the barriers panorama. Everything seems to be immobile
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">• IDAE: Plan for renewable energies 2011-2020• Ministerio de Industria, Energia y Turismo. Anexo IV. Evaluacion del potencial de las Fuentes de energia renovables
Progress to date	Starting phase
Planned actions	Further discussions with experts are foreseen on the latest information and plans

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