

## It's the Final Countdown!

***30<sup>th</sup> of June is the deadline by which Member States have to release to the European Commission their National Renewable Energy Action Plans (NREAPs), a requirement of the Renewable Energy Directive. The NREAPs present the planned development of renewable energy technologies up to 2020 and detailed information on measures taken to reach the target. This article provides an overview of Member States' progress regarding these NREAPs in nineteen EU Member States.***

**National Renewable Energy Associations have also published “industry roadmaps” reflecting the renewable industry’s views on the content of the upcoming action plans, in the framework of an IEE- funded project “REPAP2020”. Links to the industry roadmaps are available in this article.**

### **Austria**

A broad consortium led by the Austrian Institute of Economic Research (WIFO) is responsible for the drafting of the action plan. In its [energy strategy](#) published in March, Austria demonstrated its intention to overachieve its renewable energy target of 34%, aiming now for 35.48 % RES in 2020.

### **Belgium**

Belgium is one of the few countries projecting not to reach its 2020 target. The difficulty in Belgium is the necessity to perform a target-sharing between 4 governments: Wallonia, Flanders, Brussels and the federal governments (for offshore). Internal target-sharing and regional strategies are likely to be adopted in late May.

The [Renewable Energy Association EDORA](#) provided [a 2020 scenario](#) aiming for more than 16% renewable energy in 2020. EDORA shows hereby that Belgium can reach more than its renewable energy target defined by the RES Directive.

### **Bulgaria**

Depending on its energy efficiency policies, Bulgaria could overachieve or underachieve its target. However, there is still no official working group or consultation of renewable energy industry stakeholders on drafting of the National Renewable Energy Action Plan.

The Bulgarian Renewable Energy Association (APEE) drafted [an industry roadmap for Bulgaria](#) to provide for expertise.

### **Czech Republic**

The Czech Ministry of Industry and Trade is preparing the National Renewable Energy Action

Plan. In the Czech Republic, there appears to be a lack of political will to push renewable energy developments forward as shown by the recent freezing by the DSO of new grid connection permits for wind and photovoltaic installations.

## Denmark

The Danish energy agency is drafting the input to the renewable energy action plan. Denmark currently assumes that it will not meet its 2020 target through domestic actions alone but it is very likely that with additional measures provided in the national action plan, Denmark could in fact reach its target.

## Estonia

The Department of Energy within the Economic Ministry is in charge of drafting the National Renewable Energy Action Plan. A working group has been set up, gathering representatives of various ministries (agriculture, finance, environment, etc.).

## France

The Ministry of Ecology, Energy, Sustainable Development and Marine Affairs is responsible for drafting the NREAP. France intends to reach its binding 2020 target with domestic action alone. However, partnerships and joint projects established in the context of the Mediterranean Solar Plan might lead France to import a certain amount of electricity produced from renewable sources from countries not members of the European Community. Key objectives for the renewable energy mix in 2020 have already set in the “Grenelle de l’Environnement”.

The French Renewable Energy Association ([Syndicat des Energies Renouvelables](#) ) has published a French Industry Roadmap [available on this link](#).

## Germany

After the German government announced its intention at the end of 2009 to reach 18.7% (instead of the binding target of 18%) of renewable energy in the gross final energy consumption, the Ministry for the Environment is currently drafting the NREAP, which is in the process of being agreed in inter-service consultation with other ministries.

On the basis of [the German Industry Roadmap](#), which was produced in the framework of the REPAP2020 Project, the [German Renewable Energy Association \(BEE\)](#) is in discussion with the ministries about the measures and level of ambition of the NREAP. BEE has shown that at least 28% of renewables in final energy consumption in 2020 is feasible.

## Ireland

The Department of Communications, Energy & Natural Resources is consulting industry

stakeholders on the Irish National Renewable Energy Action Plan. Ireland plans to reach its target with domestic action and could be interested in exporting electricity provided that the right grid reinforcements and interconnectors are in place.

## Italy

The Italian Ministry is working to define targets in cooperation with the GSE (the Italian energy system manager of green certificates) and ERSE (a publicly-controlled company developing research projects on the national electricity system).

Italy assumes it will not be able to reach its renewable energy target in 2020 and plans to import about 1,1 Mtoe electricity by that date.

## Latvia

The Economic Ministry is in charge of drafting the NREAP. The Institute of Physical Engineering is giving some input for the Economic Ministry.

## Lithuania

A draft Renewable Energy Strategy will be provided by the Lithuanian energy agency to the government at the end of March proposing new measures including measures on renewable heat. New feed in tariffs are also currently being adopted. The NREAP will report on this upcoming RES strategy.

## Poland

The National Renewable Energy Action Plan for Poland has already been drafted. However, the Polish Government has not yet consulted RES organisations on the basis of this document. RES experts expect the document to be published as soon as possible so as to perform a public consultation on the Government's proposals. The [Polish Renewable Energy Association](#) (PIGEO) has published [a Polish Industry Roadmap](#).

## Portugal

On 16<sup>th</sup> of March, the Portuguese Government presented the National Energy Strategy up to 2020 (ENE2020). The key points of the Strategy are to achieve a share of 60% of renewable electricity by 2020, and increase the share of renewable energy in the Portuguese GDP from 0.8% to 1.7%. It sets targets for various renewable energy technologies. This strategy was welcomed by the [Portuguese Renewable Energy Association \(APREN\)](#) which has recently issued [its industry roadmap](#) showing that Portugal could reach a 34,8% share of RES in final energy consumption.

## Spain

According to the Spanish Energy Agency (IDEA) and the Ministry for Industry, Tourism and Trade, a first draft of the Action Plan might be published beginning of April 2010. This will be followed by an official consultation process where the stakeholders should be involved.

The Spanish Government plans to elaborate a new RES Plan during the course of 2010 for the period 2011-2020, which will look at RES planning for the next 10 years, in coherence with the Spanish action plan. Furthermore, the Spanish Government recently announced a general update of the RES-E promotion scheme until the end of 2010.

## Romania

The NREAP is being drafted by the Department of Energy within the Ministry of Economy. The Renewable Energy Law 220 which was adopted in November 2008 is currently undergoing state aid clearance procedure. The renewable energy industry hopes that this procedure will be concluded as soon as possible to set an appropriate legislative framework for investments.

## Slovakia

The Ministry of Economy is responsible for drafting the NREAP. According to insiders, a key problem is the lack of political will to develop wind energy and photovoltaics in particular. Stakeholders such as NGOs, Entrepreneurs' Associations or associations of municipalities will be consulted on the draft before final publication.

## Sweden

The Swedish energy agency released a draft renewable energy action plan for consultation until 1<sup>st</sup> April. The main drawback is the considerable increase in energy consumption. On the positive side, the new national target for 2020 for solar energy is promising. A Sweden-Norway joint support scheme is planned to be set up by January 2012. Principles have been set but details need to be sorted out. Each country will increase its share of RES by 12.5 TWh in 2020. It will be a technology neutral market. [The Swedish Renewable Energy Association \(SERO\)](#) has issued [a roadmap](#) showing that Sweden has the potential to reach 73% renewable energy by 2020.

## The Netherlands

The Dutch government is working on the assumption that the target of 14% set by the RES-directive (instead of the original Dutch target of 20%) is reachable with only existing laws and regulations. The NREAP is being drafted by the Ministry for Economical Affairs. Mid-April, a wide consultation with market groups will follow. The Renewable Energy Umbrella organization [DE Koepel](#) is working on the Netherlands Industry Roadmap, in the framework of the REPAP2020-Project. The DE Koepel wants to reach a target of minimum 16%.

However, it fears that if no additional measures to the current stimulation package are taken, the 14% target is not at all reachable by 2020 and market instability will remain.

### **United Kingdom**

The UK Government is likely to use the lead scenario set out in the Renewable Energy Strategy of July 2009 to fulfill its obligation to submit the NREAP. The action plan might be delivered earlier than 30 June 2010, given the General Election in early May.