

TABLE OF CONTENTS

1	ORGANISATION OF THE REVIEW	7
2	SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS	9
3	GENERAL ENERGY POLICY	21
4	ENERGY AND THE ENVIRONMENT	39
5	ENERGY EFFICIENCY	57
6	OIL	75
7	NATURAL GAS	87
8	COAL	105
9	RENEWABLE ENERGY	113
10	ELECTRICITY	127
11	NUCLEAR	153
12	ENERGY TECHNOLOGY AND R&D	161
A	ANNEX: ENERGY BALANCES AND KEY STATISTICAL DATA	173
B	ANNEX: INTERNATIONAL ENERGY AGENCY "SHARED GOALS" ..	177
C	ANNEX: GLOSSARY AND LIST OF ABBREVIATIONS	179

Tables and Figures

TABLES

1. Energy Taxes in Spain, 2004	35
2. Spanish GHG Emissions Inventory, 1990 and 2002	39
3. CO ₂ from Fuel Combustion by Sector, 1990 and 2002	39
4. NAP Energy Sector Allocations in Mt CO ₂ for Large Generators in Spain	46
5. Forecast CO ₂ Emissions, Non-energy Sector, and the Spanish NAP ..	47
6. Sulphur Content Reductions in Fuel Use in Spain, 2005–2009 ...	51
7. Passenger Kilometres in Spain, 1990 and 2002	60
8. Freight Tonnage Kilometres in Spain, 1990 and 2002	61
9. TFC by Sector under the E4 Strategy, 2000 to 2012	65
10. Projected Energy Saving by Sector from the E4 Strategy by 2012	66
11. Projected Energy Supply by Fuel under E4, 2000 to 2012	67
12. Projected CO ₂ Emissions Avoided by the E4 in 2012	67
13. Spanish Oil Product Demand, 2001 to 2003	77
14. Regional Taxes on Motor Fuels	78
15. Spanish Refining Capacity, 2004	83
16. Imports of Natural Gas by Origin, 2002 and 2003	89
17. Regasification Plants on the Iberian Peninsula	90
18. Annual Investment and Expansion of the Spanish Gas Network, 1993 to 2003	94
19. Average Heating Values of Coal Used in Spain by Type	105
20. Total Coal Supply, 1980 to 2003	106
21. Spanish Mining Companies by Employees (end of 2003)	108
22. Total Coal Production by Type of Coal, 1998 to 2002	109
23. Spanish Hard Coal Producers (end of 2003)	109
24. Incremental Installed Capacity of Renewables, 1999 to 2003 ...	114
25. Feed-in Premium Tariff Levels and Annual Change for Selected Technologies, 2000 to 2004	121
26. Changes from the Special Regime to the Market Incentive, 2004 ...	123
27. Installed Capacity (31 December) and Peak Load	135
28. Annual International Trade Balance	136
29. Market Shares of the Ordinary Regime Market on the Peninsula, December 2004	142
30. Market Shares in Regulated and Competitive Markets, 2004	143
31. Regulated Costs in the 2004 Budget	144
32. Operating Nuclear Power Reactors in Spain	154

FIGURES

1. Map of Spain	20
2. Total Primary Energy Supply, 1973 to 2010	23
3. Energy Production by Source, 1973 to 2003	24

4. Total Primary Energy Supply in IEA Countries, 2003.....	25
5. Spanish Government Energy Policy Administration.....	27
6. CO ₂ Emissions by Fuel, 1973 to 2003	40
7. CO ₂ Emissions by Sector, 1973 to 2003	41
8. Energy-related CO ₂ Emissions per GDP in Spain and in Other Selected IEA Countries, 1973 to 2003.....	41
9. Development of New Vehicle Registrations by Fuel, 1990 to 2002	50
10. Energy Intensity in Spain and in Other Selected IEA Countries, 1973 to 2010.....	57
11. Total Final Consumption by Source, 1973 to 2010.....	58
12. Total Final Consumption by Sector and by Source, 1973 to 2010....	59
13. Total Final Consumption under BAU and E4 Scenarios, 2012	63
14. CHP in Spain: Development of Annual Growth and Accumulated Capacity, 1996 to 2001	69
15. Distribution of CHP Plants and CHP Capacity Installed by Industrial Sector in Spain, 2002	69
16. Supply of Oil by Sector, 1973 to 2010.....	75
17. Fuel Prices, 2004	79
18. OECD Unleaded Gasoline Prices and Taxes, Fourth Quarter 2004....	80
19. OECD Automotive Diesel Prices and Taxes, Fourth Quarter 2004....	81
20. Supply of Natural Gas by Sector, 1973 to 2010.....	88
21. Gas Network on the Iberian Peninsula and Island Communities, 2004	95
22. Natural Gas Prices in Spain and in Other Selected IEA Countries, 1980 to 2003	97
23. Gas Prices in IEA Countries, 2003	98
24. Final Consumption of Coal by Sector, 1973 to 2010.....	107
25. Renewable Energy as a Percentage of Total Primary Energy Supply in Spain, 1973 to 2003	116
26. Renewable Energy as a Percentage of Total Primary Energy Supply in IEA Countries, 2003	117
27. Comparison of Achievement by 2003 of the Plan for the Promotion of Renewable Energy to 2006 Targets	120
28. Final Consumption of Electricity by Sector, 1973 to 2010	131
29. Electricity Generation by Source, 1973 to 2010	133
30. Installed Capacity and Peak Load, 1999 to 2004	133
31. The Spanish Electricity Transmission Network, 2004	134
32. Interconnection Capacity, 2004	137
33. OMEL Day-ahead Spot Prices, Weekly and Yearly Averages	140
34. Electricity Prices in Spain and in Other Selected IEA Countries, 1980 to 2003	145
35. Electricity Prices in IEA Countries, 2003	146
36. IEA Government Budgets on Energy R&D per GDP, 2003	162