D4.5 Final Policy briefings with key policy requirements for improved market uptake of biomethane (EU and 7 target countries)

Deliverable n.4.5

GREENMEUP

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Document control sheet

Project	**GreenMeUp - Green biomethane market uptake**
Call identifier	HORIZON-CL5-2021-D3-02: Sustainability and educational aspects for renewable energy and renewable fuel technologies
Grant Agreement n°	101075676
Coordinator	CRES - Centre for renewable energy sources and saving foundation
Work package n°	4
Work package title	Market uptake measures
Work package Leader	CRES
Document title	D4.5 Final Policy briefings with key policy requirements for improved market uptake of biomethane (EU and 7 target countries)
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Reference period	01/02/2024 - 31/07/2025
Due date **Delivery date**	31/03/2025 (Month 32) 31/07/2025 (Month 36)

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This project has received funding from the European Union's Horizon Europe Research and Innovation Programme under Grant Agreement No. 101075676.

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Chapter 1: Introduction

In the context of the GreenMeUp project, it is foreseen the design of market uptake policy measures and financial frameworks, which will allow the bioCH_4 markets to operate efficiently and effectively in the advanced and target countries where results could be replicated.

The achievement of the before-mentioned target will be carried out through the coordinated interaction of the foreseen activities within the framework of GreenMeUp project steering and enabling the development of more informed and targeted policies in the target countries and supporting them in building a robust and incentive-compatible bioCH_4 market in their final energy consumption by 2030 and beyond.

The aim of this deliverable is to provide a comprehensive list of policy briefings with key policy requirements for improved market uptake of biomethane in the seven target countries (Danube region, Czech, Greece, Latvia, Poland, Spain and Estonia) and at EU level.

The identification of the comprehensive list of policy briefings should be resulted with the actual and active involvement of key stakeholders so as to identify, outline and formulate the need and rationale of future policy interventions.

The applied methodology intends to provide insights to the following questions:

- Which are the key issues under consideration for bioCH_4 to contribute to EU/ national renewable targets for 2030 and the Fitfor55 ?
- Why is the government intervention necessary ?
- What are the policy objectives and envisioned results ?

Chapter 2 presents in detail the applied methodology, while the obtained results both for the examined countries and the different categories of stakeholders are presented analytically in Chapters 3 and 4 respectively. Finally, Chapter 5 summarizes the key findings and Annex in the final chapter illustrates the developed questionnaire, which was utilized in order to obtain the responses from the involved stakeholders.

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Chapter 2: Methodology

The objectives of the current deliverables have been fulfilled with the development of a specialized methodological approach, which consists of five different steps (Figure 1).

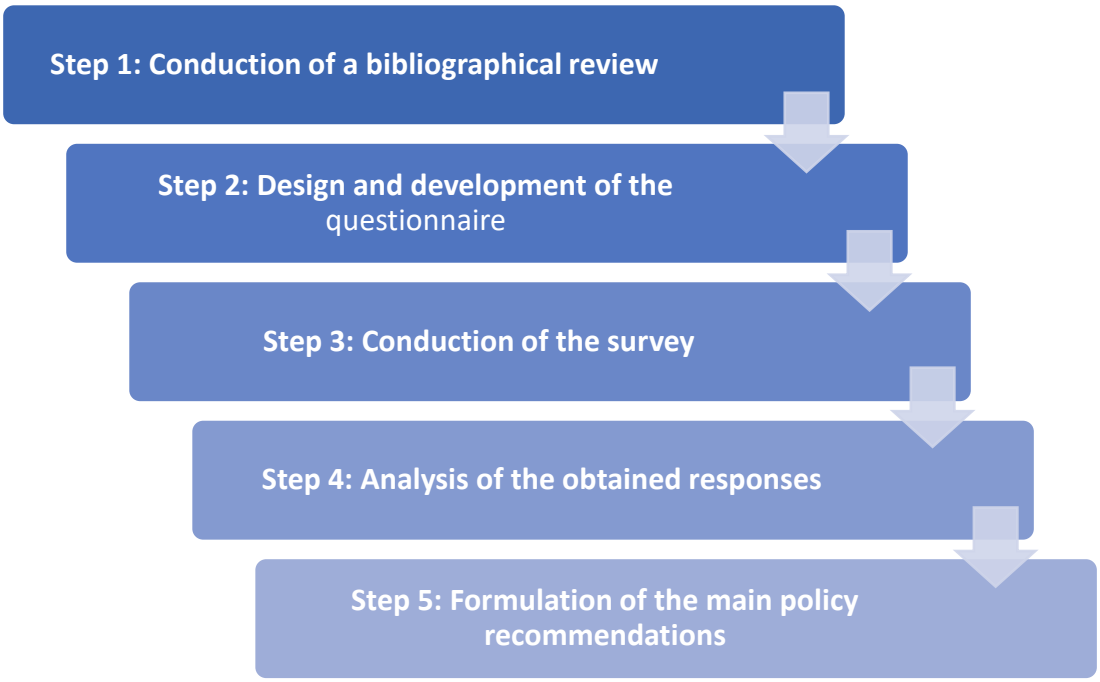

Figure 1 : Applied methodological approach.

Firstly, an in-depth bibliographical review was conducted in the 1st step focused on relevant scientific publications for the design of renewable gases. In the 2nd step, a questionnaire was developed incorporating the main identified aspects, which must be taken into consideration during the design of policies and measures so as to promote the biomethane. The developed questionnaire is presented in Annex including information about the utilized scales.

Then, the developed questionnaire was distributed to the different stakeholders in the 3rd step in order to elicit their perceptions and expectations in regards the penetration of biomethane. Totally 85 stakeholders participate into the conducted survey representing six countries (e.g., Czech, Danube region, Estonia, Greece, Latvia, Spain and Poland). The allocation of the collected questionnaires to the different examined countries is displayed in Figure 2. It should be noted that the involved stakeholders were classified into three different categories of stakeholders (e.g., decision makers, market players and society). The allocation of the collected questionnaires to the different categories of stakeholders is displayed in Figure 3.

The collected responses were analyzed thoroughly in the 4th step, while the obtained results were scrutinized taking into account the different countries and categories of stakeholders. Finally, the main policy recommendations were formulated in the 5th step taking into account the results of the previous step. It should be noted that the responses, which were assessed

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with a score higher than four, were taken mainly into account for the identification of the most important policy recommendations.

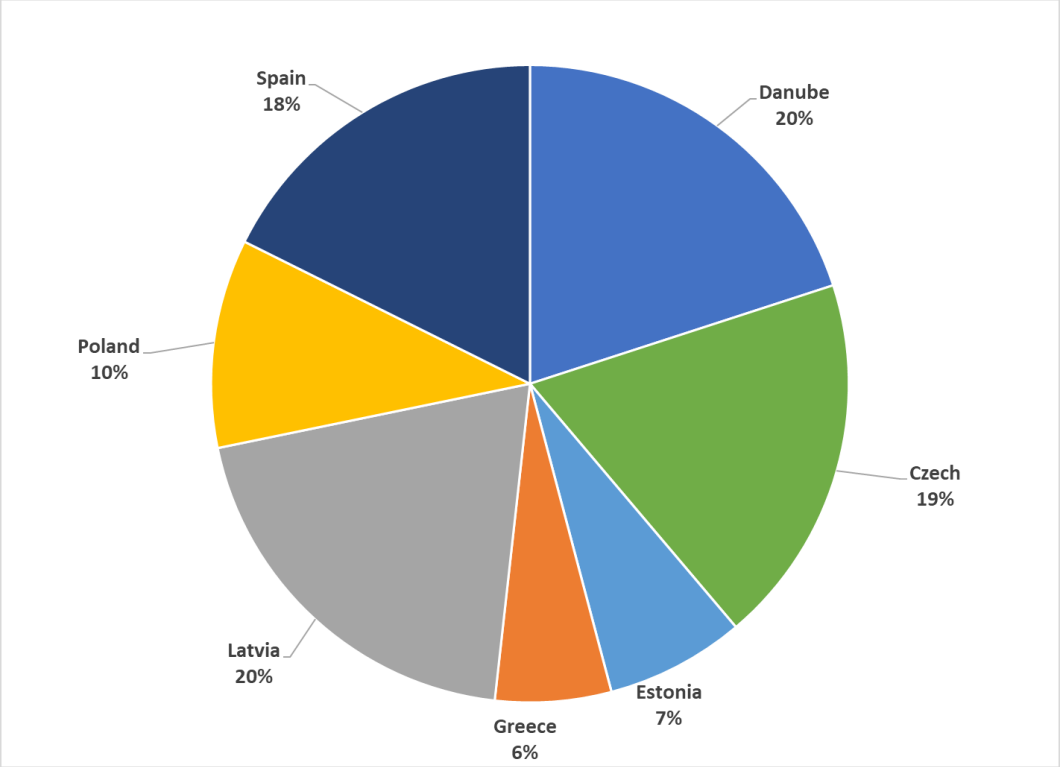

Figure 2 : Allocation of the collected questionnaires to the different countries.

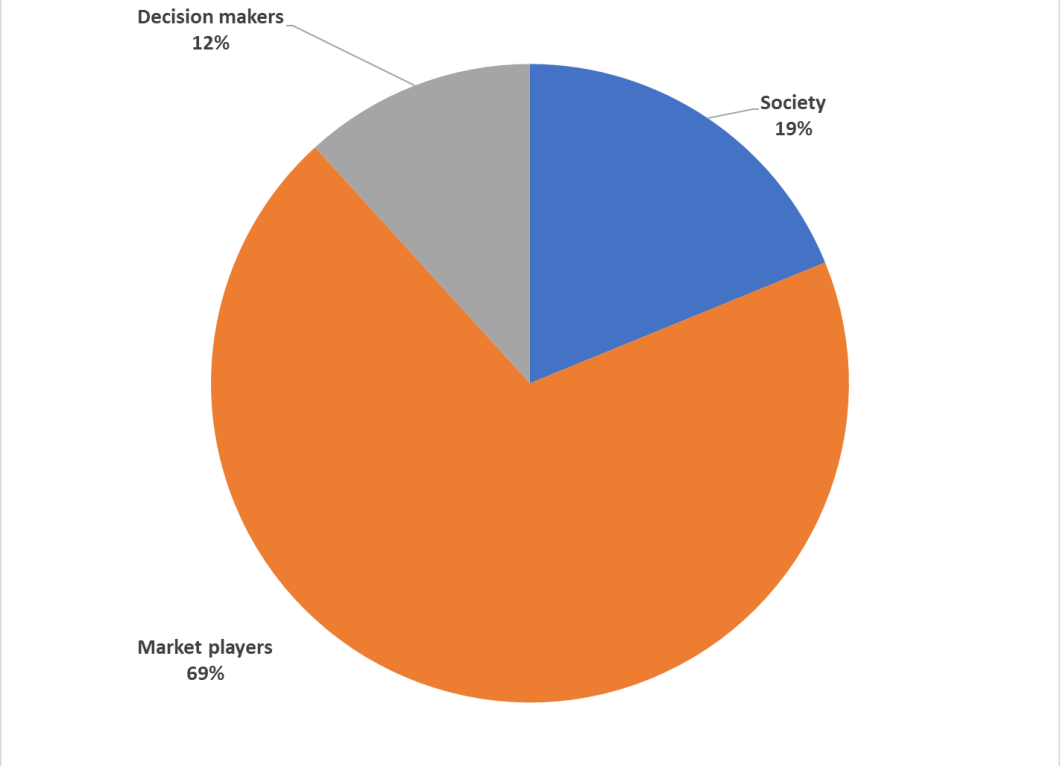

Figure 3 : Allocation of the collected questionnaires to the different categories of stakeholders.

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After the conduction of the applied methodological approach, the identified key policy requirements, as resulted by the 5th step, were discussed with the involved stakeholders with the framework of the established hubs in GreenMeUp project so as to co-agree about the final list with the key policy requirements.

The update of the current policy framework in the seven target countries in regards their key policy requirements was the main objective of the last step considering, assessing and incorporating the obtained outcomes from the applied methodological approach within the context of GreenMeUp project.

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Chapter 3: Key policy requirements according to the involved countries

Biomethane is considered as the most prominent alternative in all examined countries for the fulfillment of the 2030's energy and climate targets (Figure 4). Biogas will have also meaningful role in three countries (Danube region, Greece and Estonia), while BioLNG and BioCNG seem to have leading role in Czech, Estonia, Spain and Greece. Moreover, bioH_2 is expected to have a vital role also in Greece until 2030.

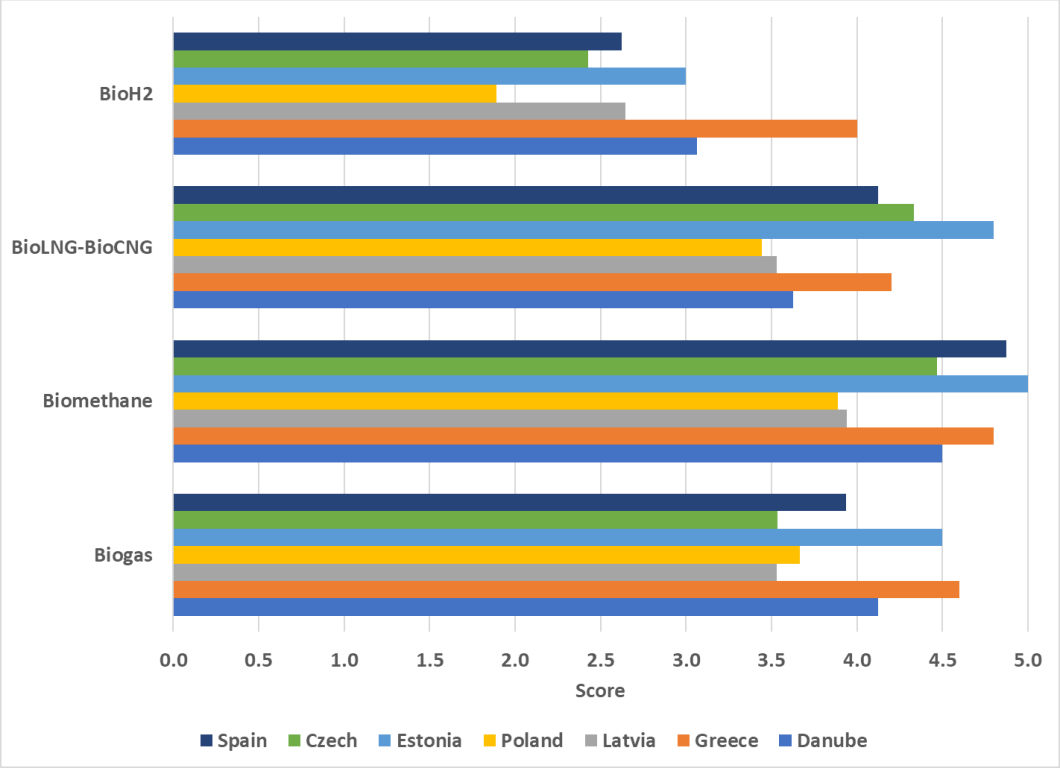

Figure 4 : Potential role of the different alternative fuels to the fulfillment of the 2030's energy and climate targets in the examined countries.

Biomethane will continue to be the most prominent alternative in all examined countries for the fulfillment of the 2050's energy and climate targets with the exemption of Estonia, which is expected to be the forerunner in the promotion of BioLNG and BioCNG (Figure 5). The penetration of biogas will be significant in Danube region, Estonia and Greece, while BioLNG and BioCNG will be deployed considerably in Greece and Spain also. Moreover, the prospects of the bioH_2 are auspicious for the case of Czech, Estonia, Spain and Greece.

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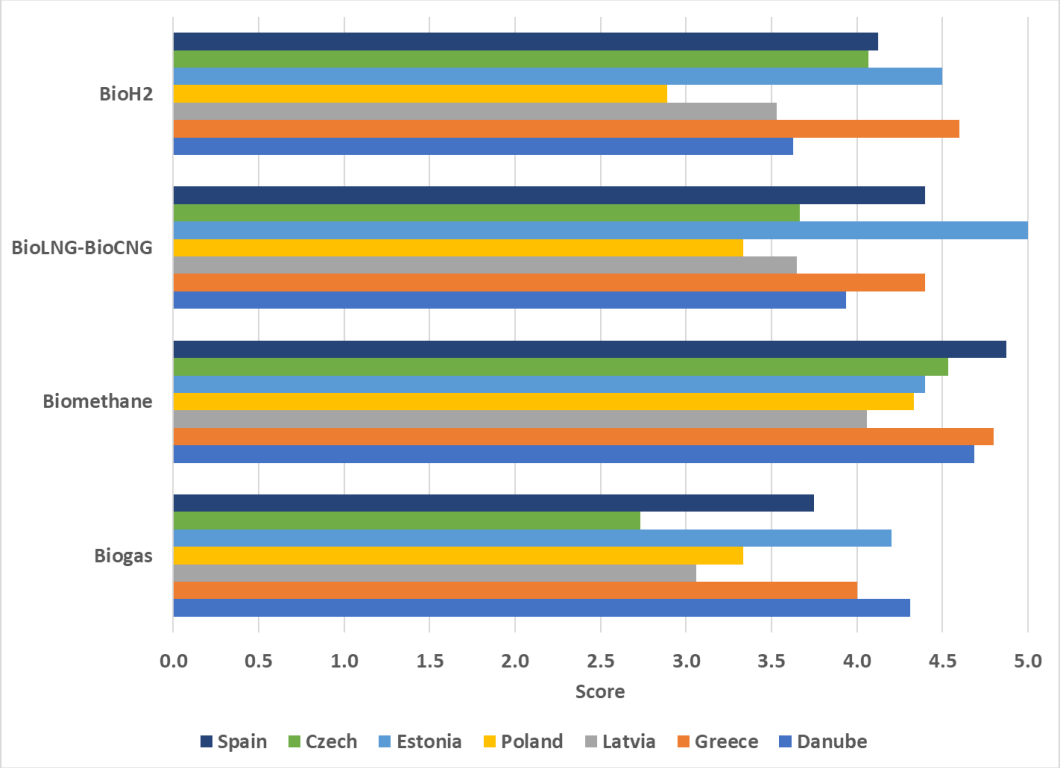

Figure 5 : Potential role of the different alternative fuels to the fulfillment of the 2050's energy and climate targets in the examined countries.

Agricultural residues will be the most prevalent feedstock type for biomethane production in 2030 for all the examined countries (Figure 6). Greece will be also the frontrunner in the exploitation of industrial (food and drink) feedstock, organic municipal solid waste and sewage for biomethane production in 2030. The industrial wastes will have a considerable potential in the Danube region, Poland, Spain and Estonia, while emphasis should be given on the sequential cropping in Estonia and on organic municipal solid waste on Spain.

The same conclusions can be derived also for the exploitation of the different feedstock types for biomethane production in 2050 (Figure 7) highlighting also the increased exploitation of sewage in the Danube region and the organic municipal solid waste and industrial waste in Czech.

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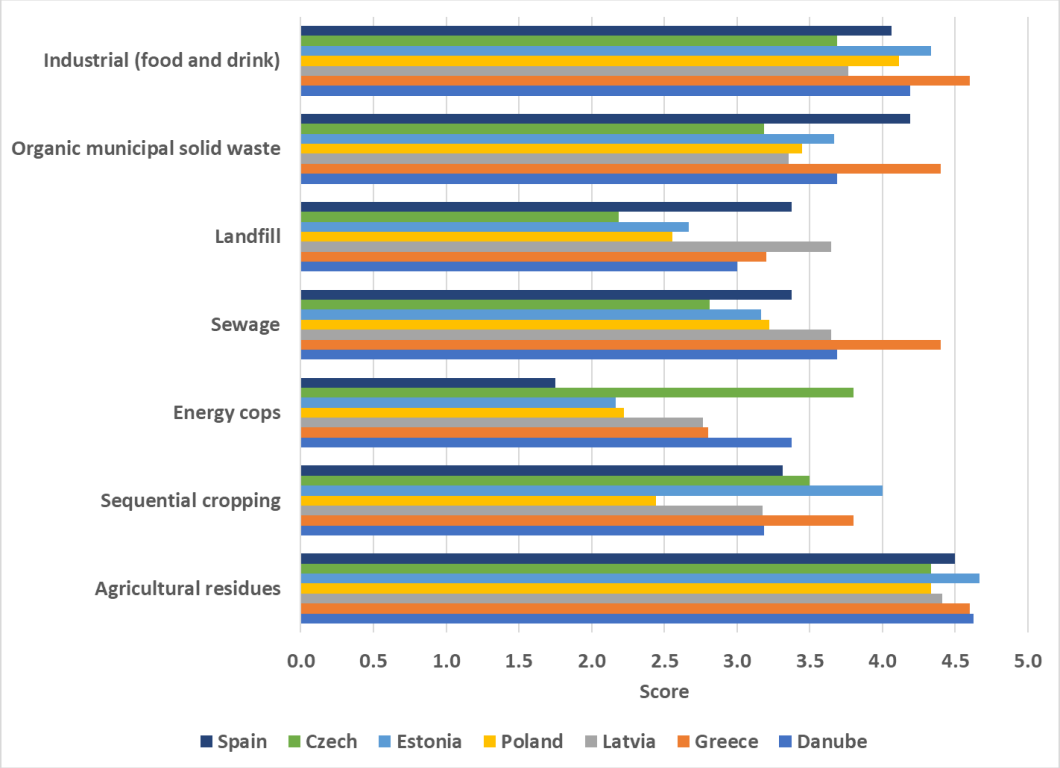

Figure 6 : Degree of exploitation of the different feedstock types for biomethane production in 2030 in the examined countries.

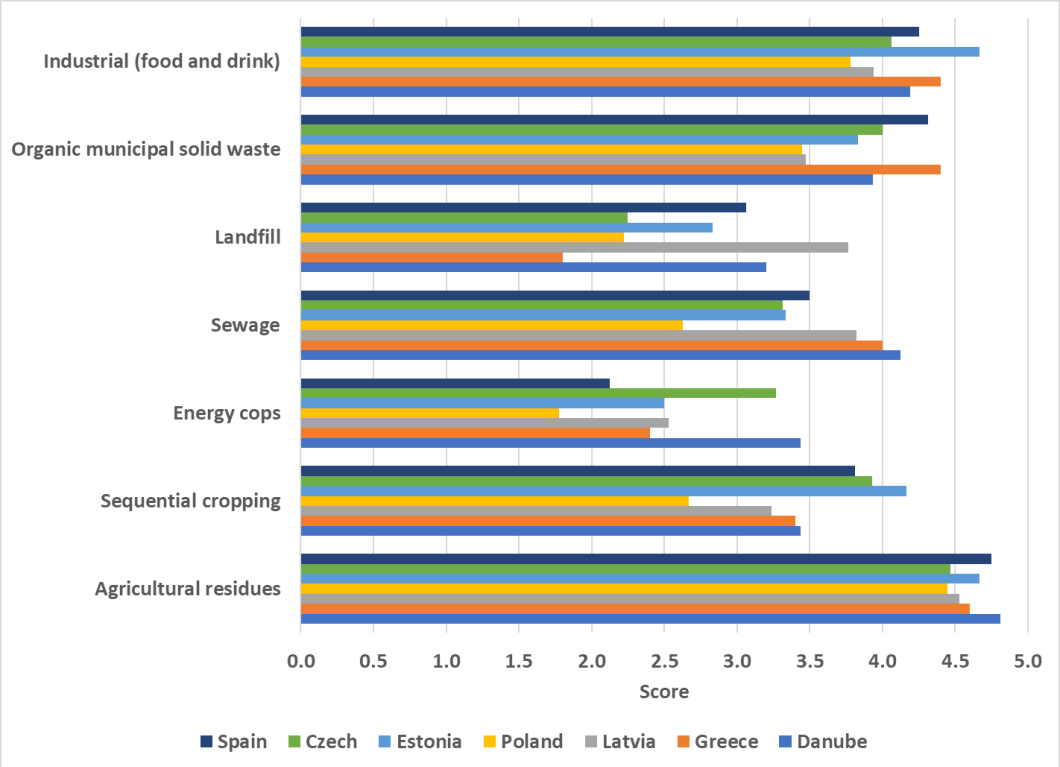

Figure 7 : Degree of exploitation of the different feedstock types for biomethane production in 2050 in the examined countries.

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Membrane separation is considered as the most prevalent upgrading technology for biomethane production in 2030 for all examined countries (Figure 8). Pressure swing adsorption is considered as the second most probable alternative option in Greece, Latvia, Spain and Estonia, water scrubbing in the Danube region and Greece, cryogenic separation in Czech and Poland and physical absorption in Spain.

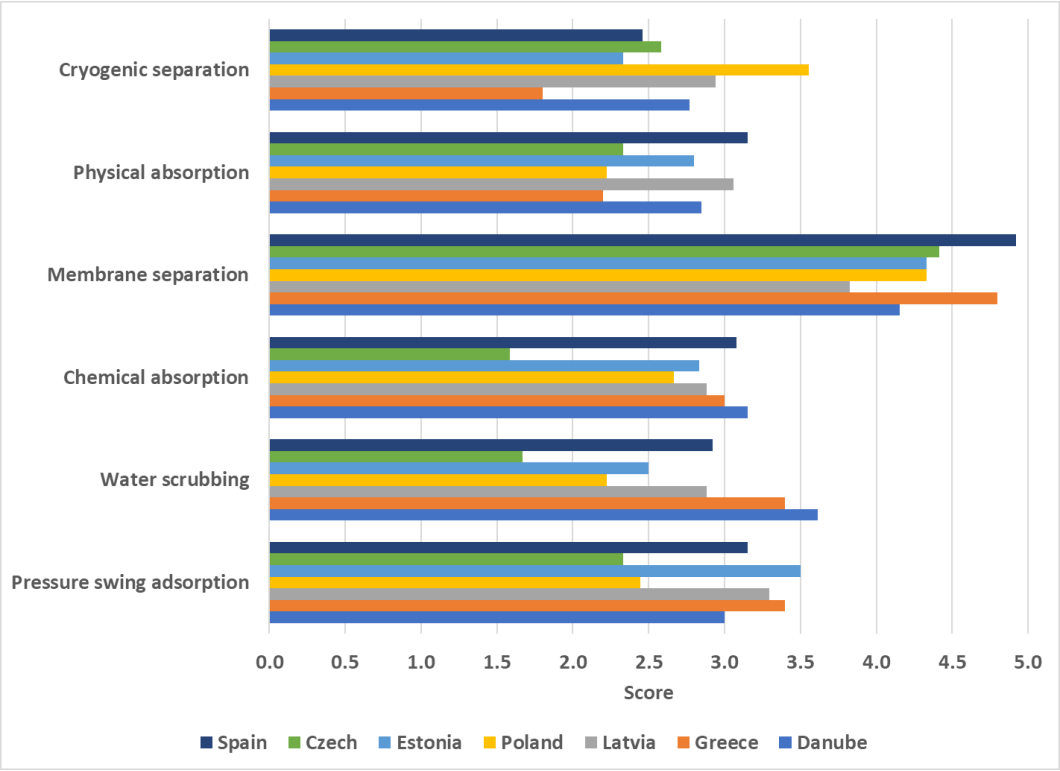

Figure 8 : Degree of utilization of the different upgrading technologies for biomethane production in 2030 in the examined countries.

Membrane separation will continue to be the most prevalent upgrading technology for biomethane production in 2050 for all examined countries (Figure 9). Pressure swing adsorption is considered as the second most probable alternative option in Greece, water scrubbing in the Danube region, chemical absorption in Estonia and Spain, membrane separation in Latvia and cryogenic separation in Czech and Poland.

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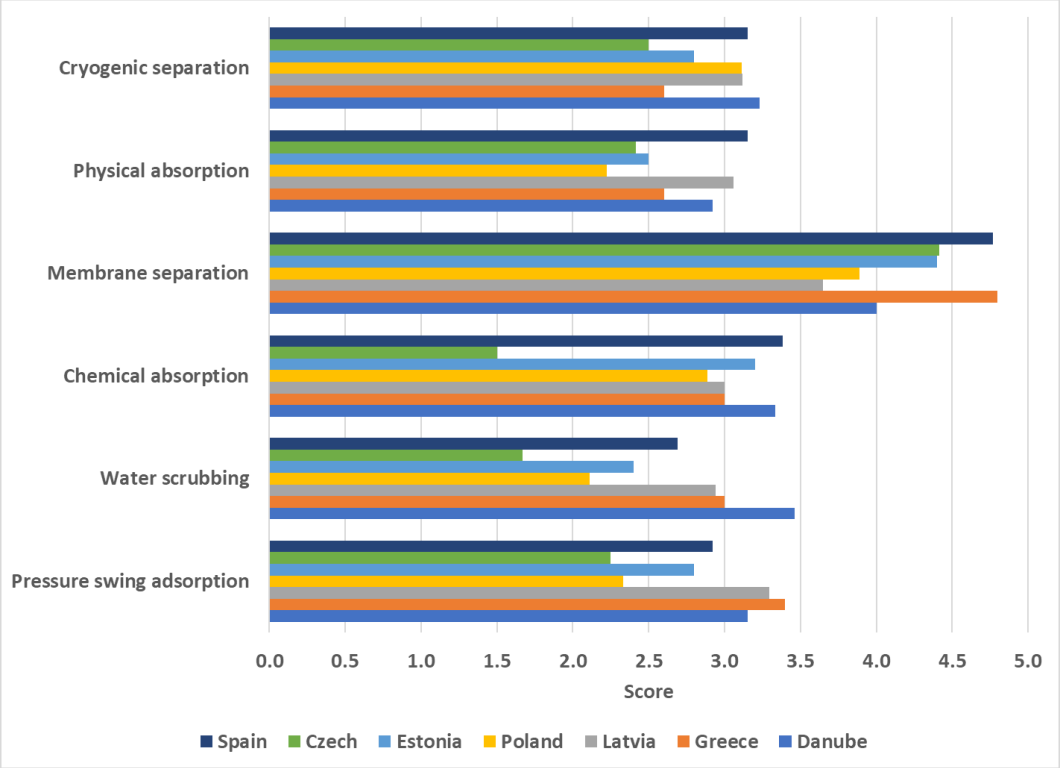

Figure 9 : Degree of utilization of the different upgrading technologies for biomethane production in 2050 in the examined countries.

The distribution of the biomethane will be carried out in 2030 mainly through the distribution grid in Czech, Greece, Estonia, Spain and the Danube region (Figure 10). The transport grid will be preferred in Greece, Spain, Latvia and Estonia, while Poland will avoid the potential connection with the existing grids.

The same conclusions can be derived also for the different connection types for biomethane distribution in 2050 (Figure 11). It should be noted that the utilization of the distribution grid will be increased for the case of Poland, while Estonia will promote biomethane with other means than the potential connection with the existing grids.

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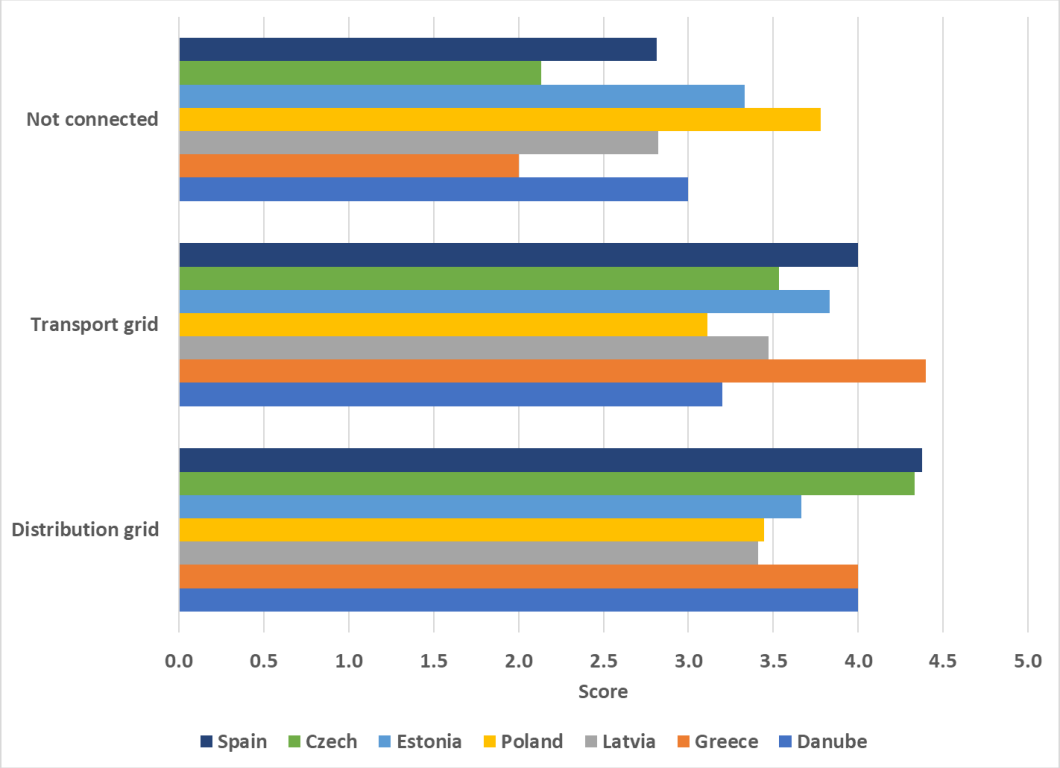

Figure 10 : Probability of using the different connection types for biomethane distribution in 2030 in the examined countries.

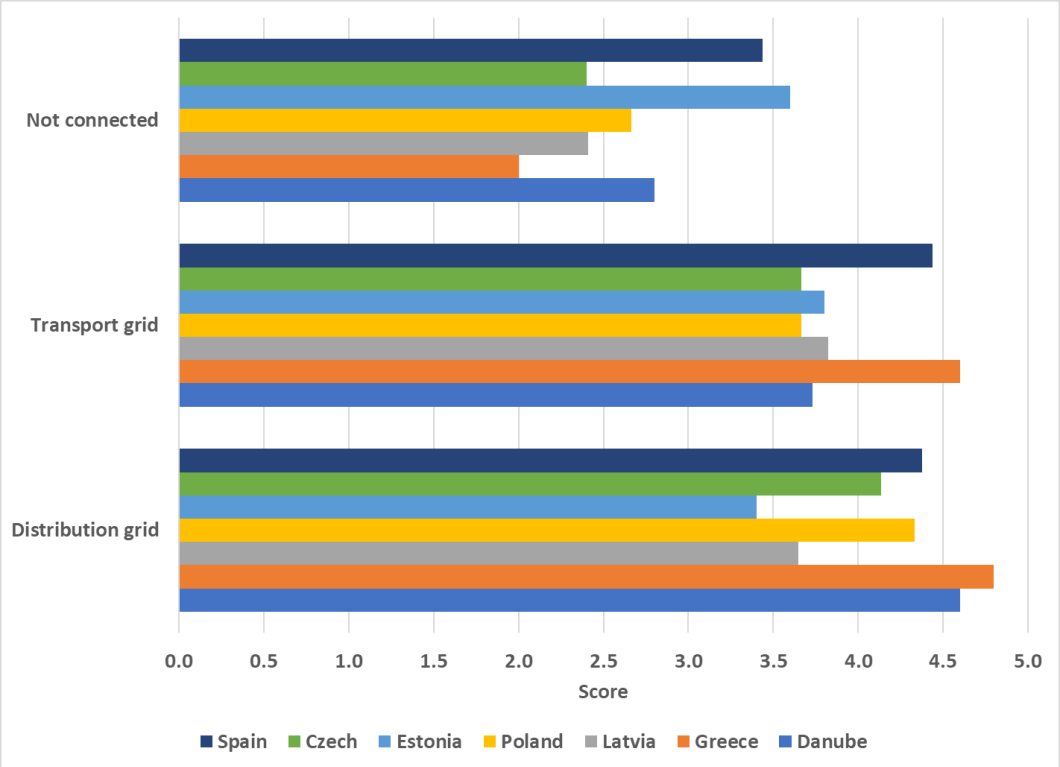

Figure 11 : Probability of using the different connection types for biomethane distribution in 2050 in the examined countries.

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The potential benefits triggered by the biomethane production and consumption are unquestionable in all examined countries (Figure 12). The improvement of the security of energy supply is considered as the most important benefits in Czech and Poland. The reduction of the CO_2 and CH_4 and potentially N_2O emissions are perceived as more significant in Greece, Spain and Estonia, while the increased waste management is considered as the most important one in Latvia. Finally, four different impacts are characterized as equally important in Danube region (improving the security of energy supply, reducing CO_2 and CH_4 and potentially N_2O emissions, enabling the energy recovery from waste and developing a healthier environment). The potential benefits are perceived generally with higher performance in Greece compared to the other examined countries.

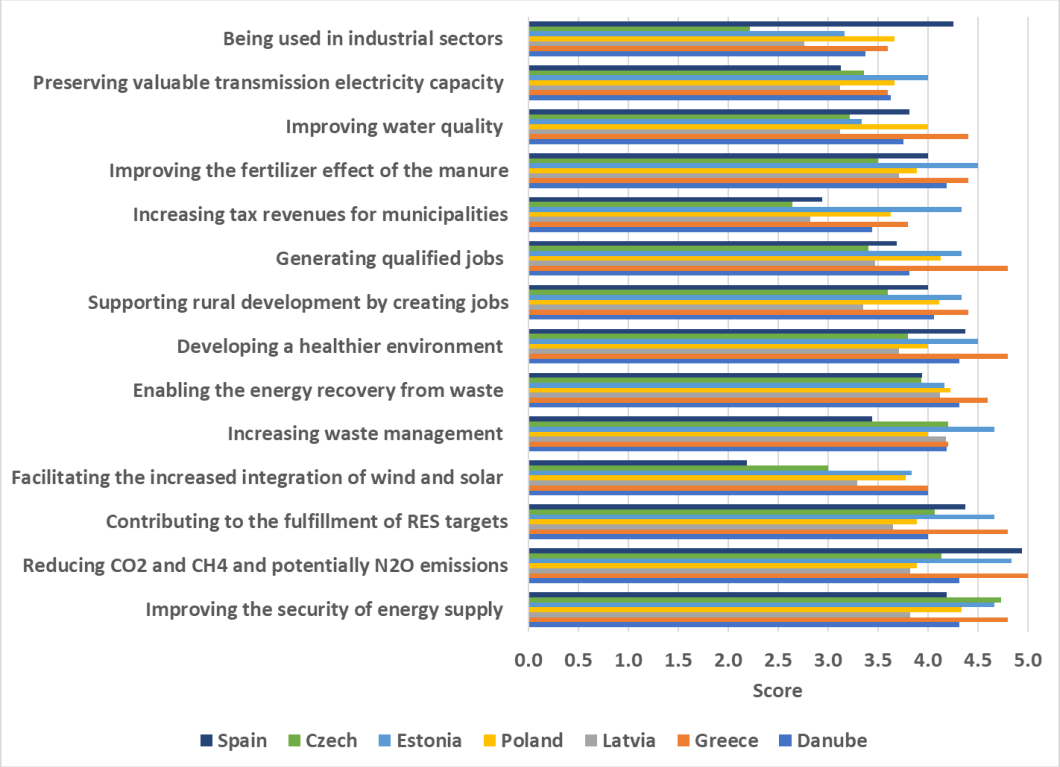

Figure 12 : Significance of the potential benefits triggered by the biomethane production and consumption in the examined countries.

The infrastructural challenges and the poor collection, improper segregation, lack of vehicles and adequate waste transportation have been identified as the most important technical barriers in almost all countries (Figure 13). Furthermore, the lack of specialized technical staff and expertise including the limited technical training and knowledge and the fulfilment of specific characteristics of biogas in Estonia have been pinpointed also as essential barriers. Poland assesses generally the potential technical barriers with higher severity compared to the other examined countries.

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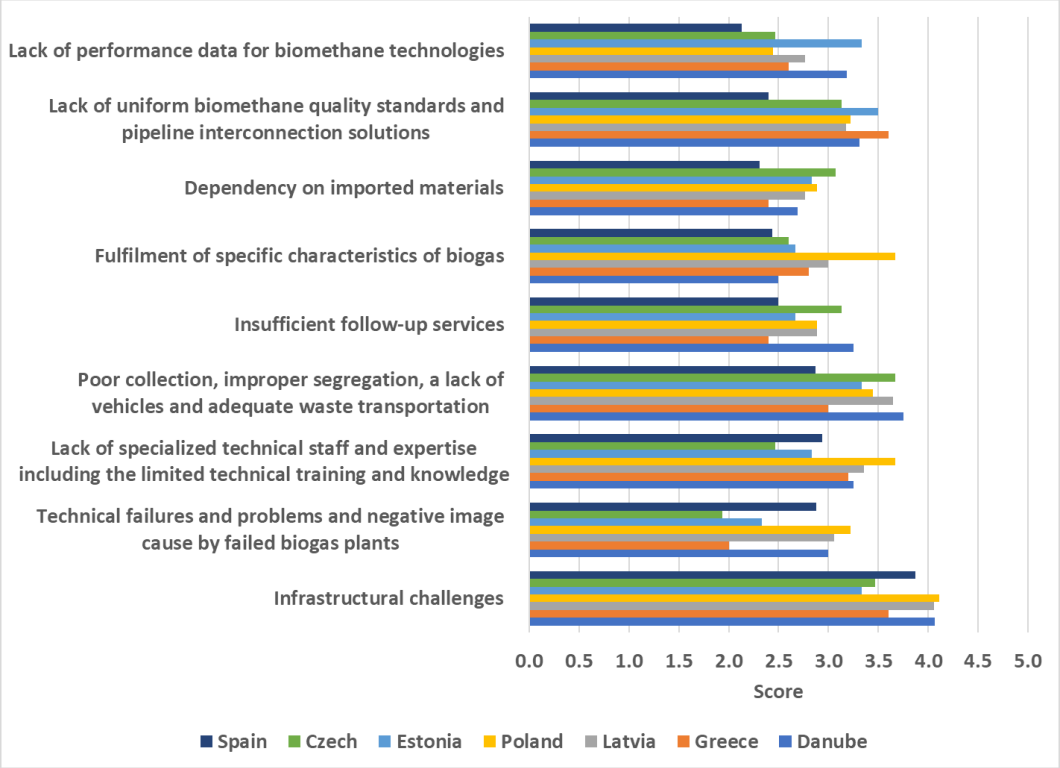

Figure 13 : Importance of the potential technical barriers affecting the biomethane production and consumption in the examined countries.

The most important economic barriers consist of the high investment cost, the lack of subsidies and financial support programmes on a long-term basis and the high cost to interconnect small biogas projects to natural gas pipeline in all examined countries (Figure 14). Moreover, the limited sustainable supply of feedstocks; securing and reliability of long-term supply in Danube region and Poland, the unavailability of bank loans in Greece and Estonia, the lack of R&D funding in Estonia and the difficulties to exploit the small-scale production of biomethane in Estonia and Spain have been characterized also as essential economic barriers.

The intensity of the potential economic barriers seems to be higher in Estonia compared to the other examined countries.

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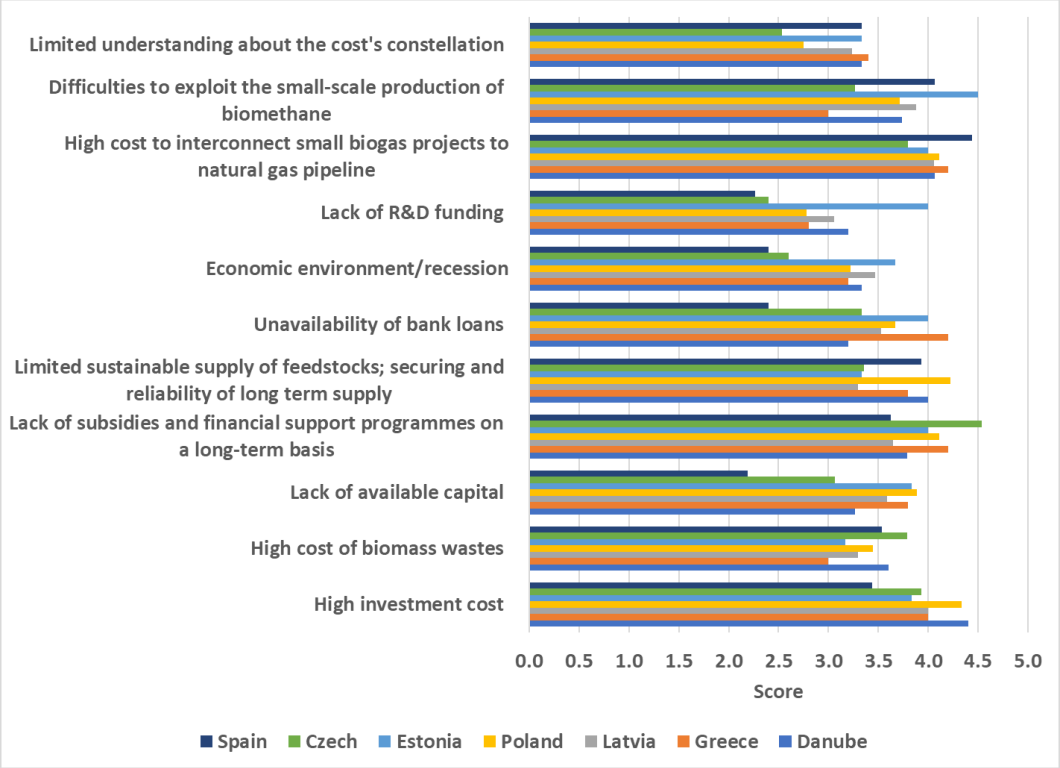

Figure 14 : Importance of the potential economic barriers affecting the biomethane production and consumption in the examined countries.

The high price of biogas/biomethane, the uncertainties and regulatory hurdles related to injection of biogas into the grid and the large amount of waste feedstocks that is currently not being separately collected and diverted for processing are considered as the most important market barriers in all countries (Figure 15). The lower prices of fossil fuels generally and the competition with other fuels/easy availability of fuelwood at zero private cost in Estonia should be taken into consideration also.

Danube region and Estonia evaluate the potential market barriers with higher severity compared to the other examined countries.

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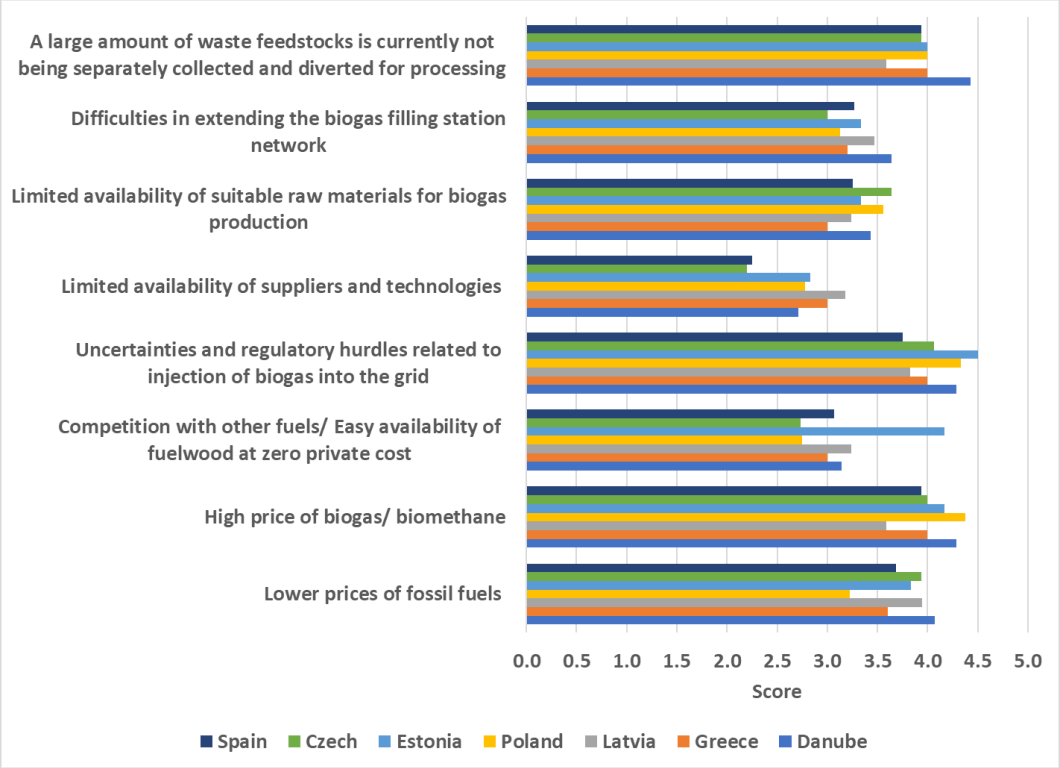

Figure 15 : Importance of the potential market barriers affecting the biomethane production and consumption in the examined countries.

The absence of coordinated policy-making across agriculture, waste management, energy and transport has been assessed as the most important institutional barriers affecting the biomethane production and consumption in all examined countries (Figure 16). The lack of political support/legislation is also significant barrier in all countries with the exemption of Estonia, while the high level of bureaucracy has been recognized in five countries (Czech, Greece, Poland, Spain and Estonia). The stop-start policy support in Danube region, Greece and Poland and the fragmented and conflicting legislative framework in Czech, Greece, Spain and Poland are considered also as crucial institutional barriers. Finally, the jurisdictional concerns in Danube region and the ineffective implementation of the Guarantees of Origin mechanism in Czech should be addressed also.

The potential institutional barriers are considered as more important in Poland compared to the other examined countries.

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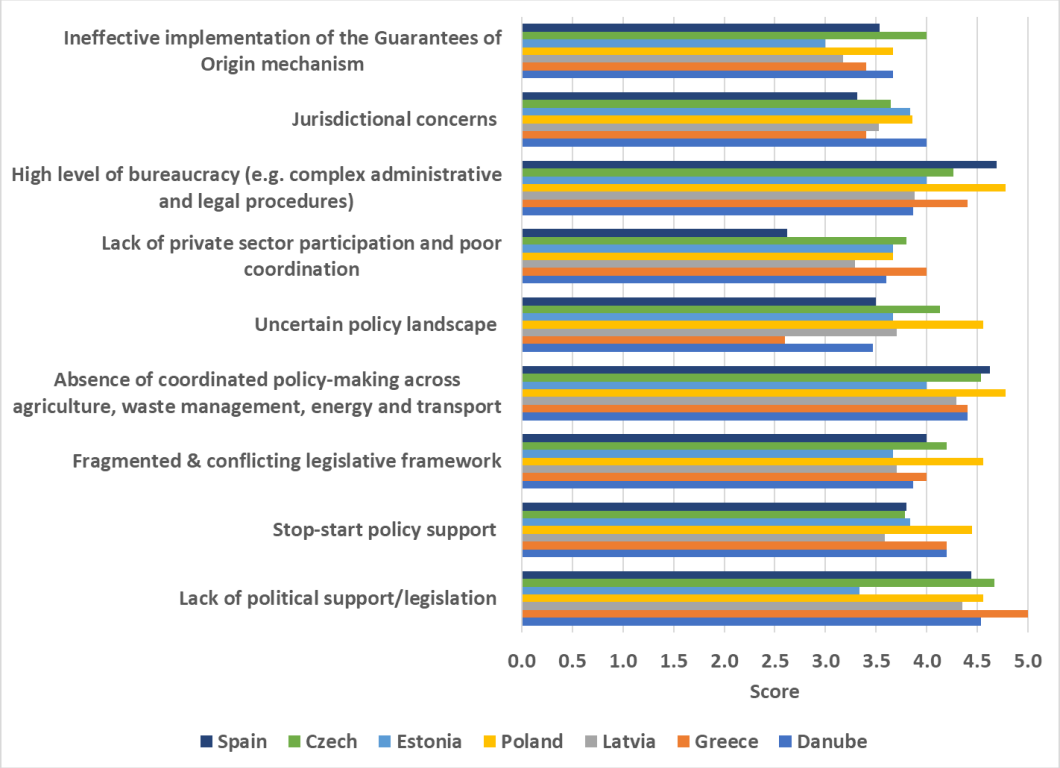

Figure 16 : Importance of the potential institutional barriers affecting the biomethane production and consumption in the examined countries.

The lack of public participation and consumer interest (Danube region, Czech, Latvia and Poland), the desire to maintain the status quo/Resistance to change (Danube region, Latvia and Poland) and the low level of knowledge and limited public awareness (Danube region, Greece, Latvia, Spain and Poland) constitute the most essential socio-economic barriers (Figure 17). Furthermore, the lack of information and information sharing in Danube region and Poland and the low level of education in Poland are recognized as important barriers.

The importance of the potential socio-cultural barriers is higher in Poland compared to the other countries.

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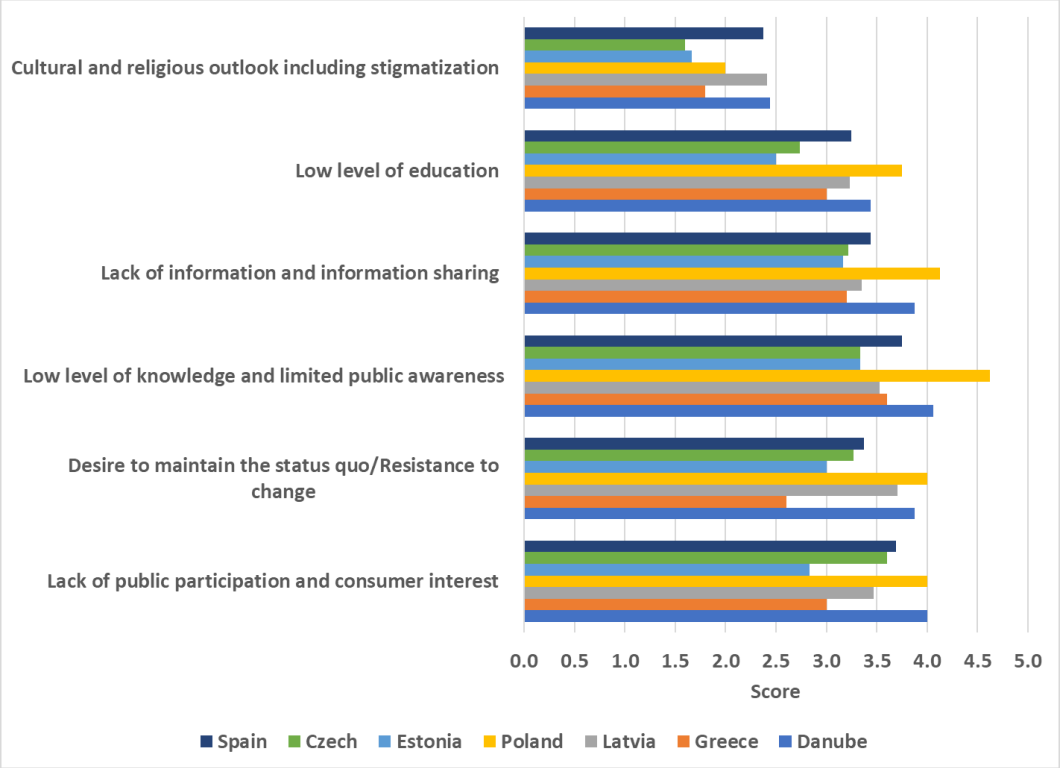

Figure 17 : Importance of the potential socio-cultural barriers affecting the biomethane production and consumption in the examined countries.

The non internalization of the environmental benefits is considered as the most important environmental barrier in the Danube region, Czech, Latvia and Estonia, while the lack of environmental data for biomethane technologies has been stated a barrier in Greece and Estonia (Figure 18). Moreover, the odour and flying insects' complaints is perceived also as significant barrier in Czech, Spain and Poland.

The intensity of the potential environmental barriers is generally higher in Spain compared to the other examined countries.

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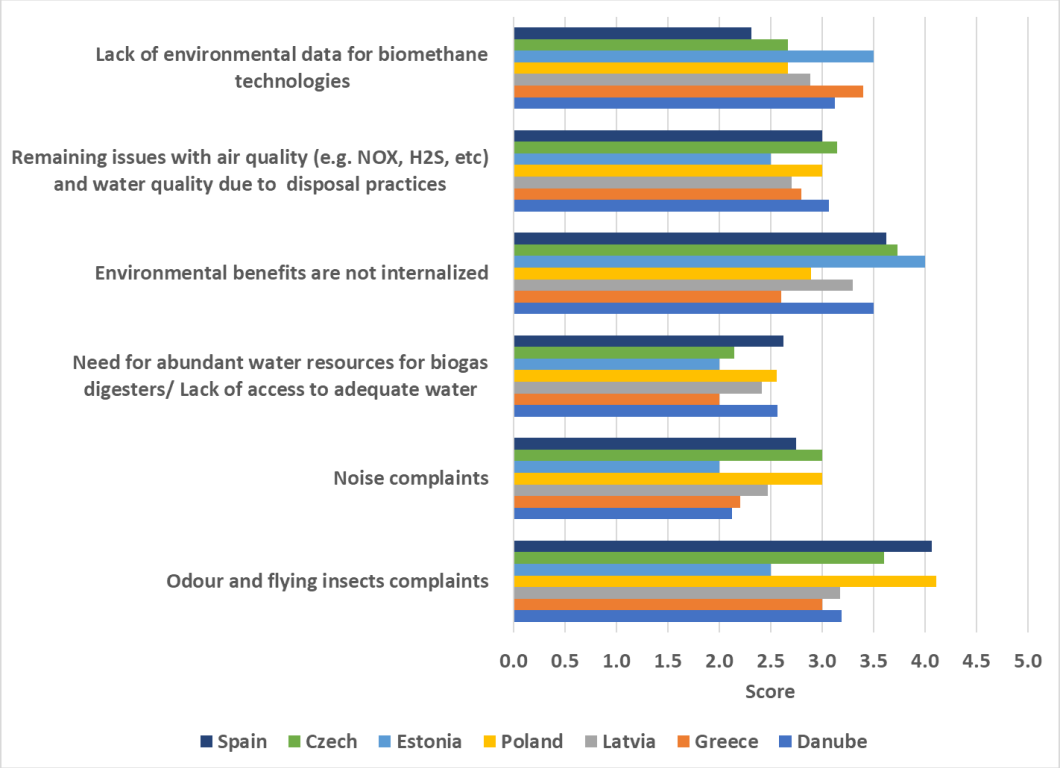

Figure 18 : Importance of the potential environmental barriers affecting the biomethane production and consumption in the examined countries.

The replacement of the natural gas so as to be utilized through the grid constitutes the most popular type of use in all examined countries (Figure 19). Moreover, it is foreseen the substitution of the natural gas for transport fuel usage in Czech, Poland, Spain and Estonia. The production of heat and/or steam is expected in the Danube region and Greece, while the CNG and diesel replacement by bio-CNG for transport fuel usage will be fostered in Czech, Latvia, Poland and Estonia and the LNG replacement by bio-LNG for transport fuel usage in Czech, Poland, Spain and Estonia. Finally, the commercial exploitation of the recycled fertilizers in Estonia and the production of branding agricultural products with a carbon-neutral label in Poland and Spain are considered as alternative options.

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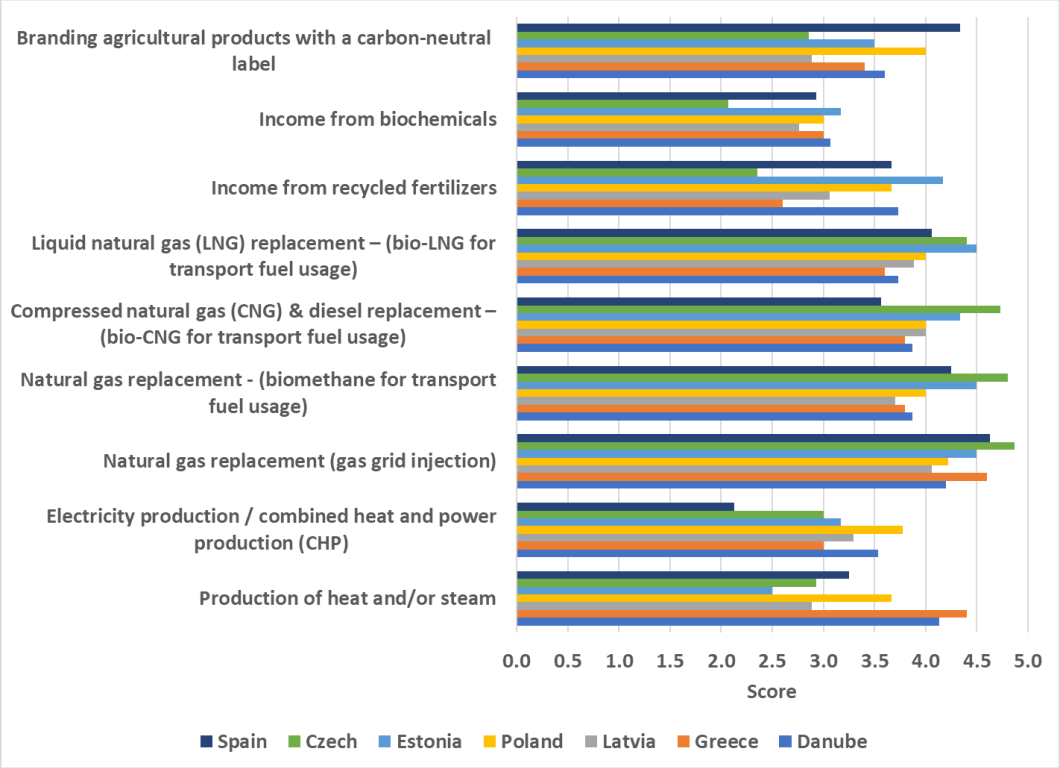

Figure 19 : Probability to utilize the biomethane for the different uses in the examined countries.

The imposition of a stricter CO_2 emission target at European level will facilitate significantly the further penetration of biomethane according to the obtained responses in Czech, Poland, Spain and Estonia (Figure 20). The same impact will have the specification of a stricter RES and CO_2 target at European level and a stricter RES target at national level as stated in the same countries including Greece. The imposition of a stricter energy efficiency target at European level and national level is not expected to lead to the massive penetration of biomethane for all countries with the exemption of Estonia and Greece respectively. The adoption of a target feedstock management policy (Greece and Estonia), digestate policy (Greece, Poland, Spain and Estonia) and biogas utilization policy (Czech, Greece, Poland, Spain and Estonia) can trigger the further deployment of biomethane plants.

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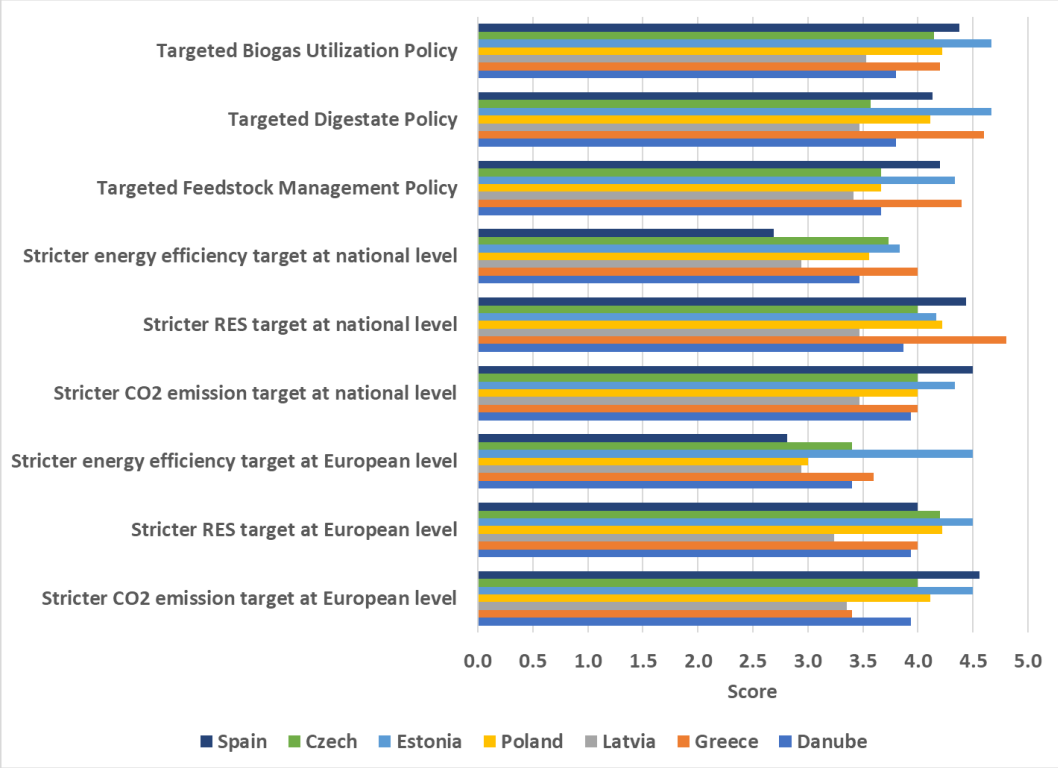

Figure 20 : Effectiveness of the various factors/drivers to the biomethane penetration in the examined countries.

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Chapter 4: Key policy requirements according to the different categories of stakeholders

Biomethane is considered as the most prevailing alternative in all examined categories of stakeholders for the fulfillment of the 2030's energy and climate targets (Figure 21). A similar role was attributed to BioLNG-BioCNG and biogas by the involved stakeholders with the exemption of decision makers, who recognize more significant role for biogas compared to BioLNG and BioCNG. Finally, bioH_2 has considerably lower prospects until 2030.

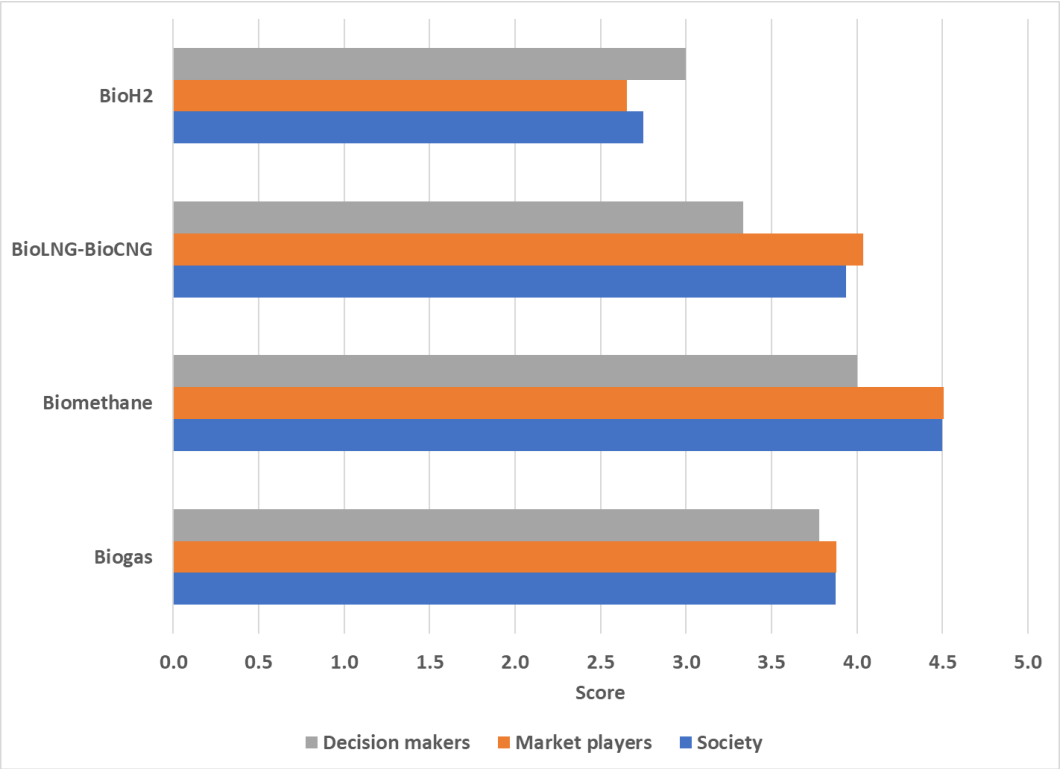

Figure 21 : Potential role of the different alternative fuels to the fulfillment of the 2030's energy and climate targets in the examined categories of stakeholders.

Biomethane will continue to be considered as most prevalent alternative in all examined categories of stakeholders for the fulfillment of the 2050's energy and climate targets (Figure 22). Nevertheless, the penetration of bioH_2 will be reinforced presenting similar performance compared to BioLNG-BioCNG, while the society shows a stronger preference to biogas.

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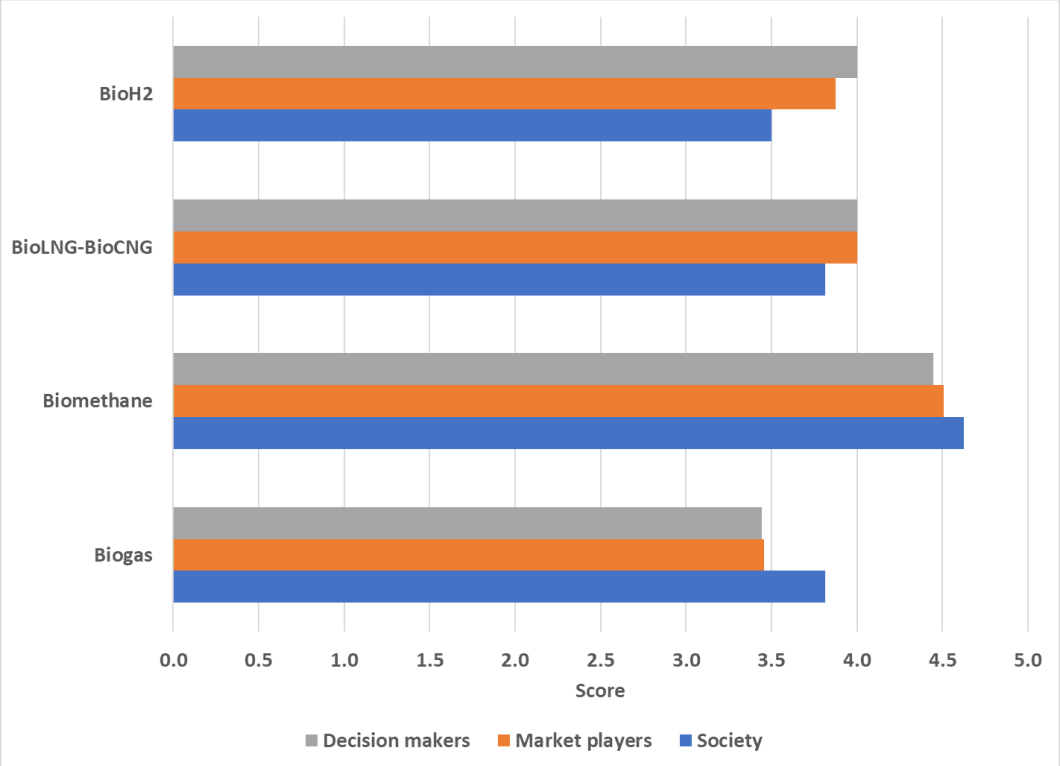

Figure 22 : Potential role of the different alternative fuels to the fulfillment of the 2050's energy and climate targets in the examined categories of stakeholders.

Agricultural residues will be the most prevalent feedstock type for biomethane production in 2030 for all examined categories of stakeholders (Figure 23). Moreover, the potential of the industrial wastes is also meaningful. Finally, the organic municipal solid waste will have a significant role according to the marker players.

The same conclusions can be derived also for the preference on agricultural residues and industrial wastes for biomethane production in 2050 (Figure 24). The sequential cropping, sewage and organic municipal solid waste present increased significance in 2050 compared to 2030 for all the examined categories of stakeholders.

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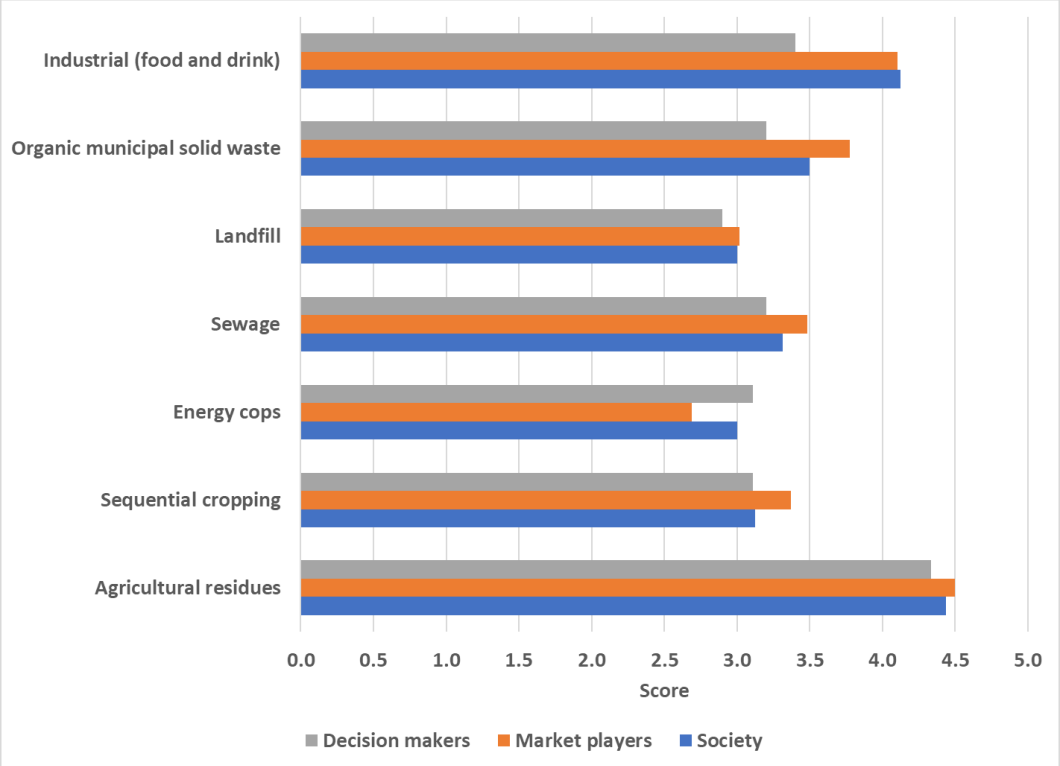

Figure 23 : Degree of exploitation of the different feedstock types for biomethane production in 2030 in the examined categories of stakeholders.

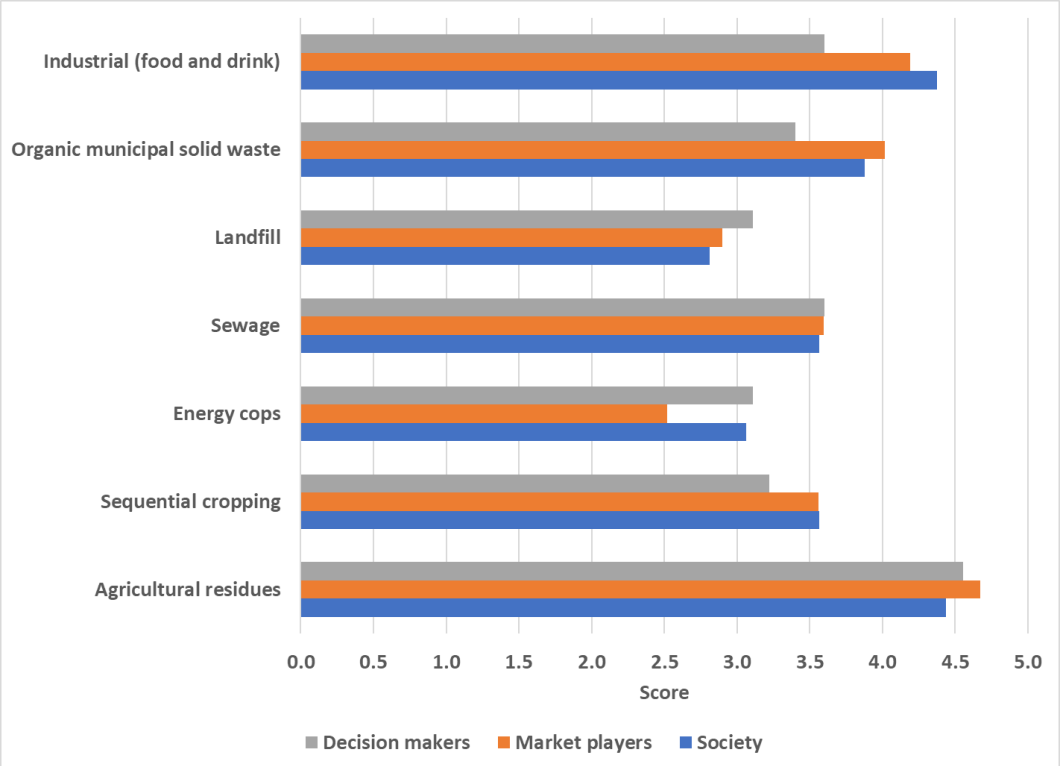

Figure 24 : Degree of exploitation of the different feedstock types for biomethane production in 2050 in the examined categories of stakeholders.

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Membrane separation is considered as the most prevailing upgrading technology for biomethane production in 2030 for all examined categories of stakeholders (Figure 25). Pressure swing adsorption is expected to have a satisfactory penetration according to the decision makers.

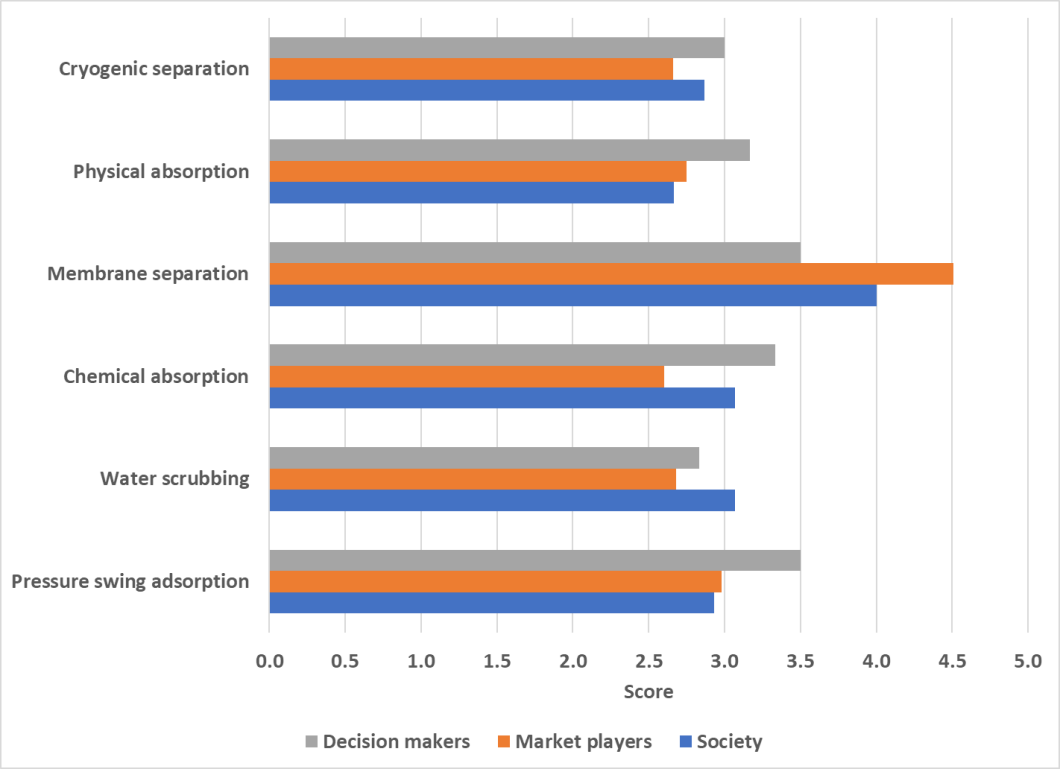

Figure 25 : Degree of utilization of the different upgrading technologies for biomethane production in 2030 in the examined categories of stakeholders.

Membrane separation will continue to be the most prevalent upgrading technology for biomethane production in 2050 for all examined categories of stakeholders (Figure 26). Pressure swing adsorption and chemical absorption are considered as probable alternative options according to the decision makers.

Generally, all the different upgrading technologies have been assessed with higher performances from decision makers compared to the other categories with the exemption of membrane separation.

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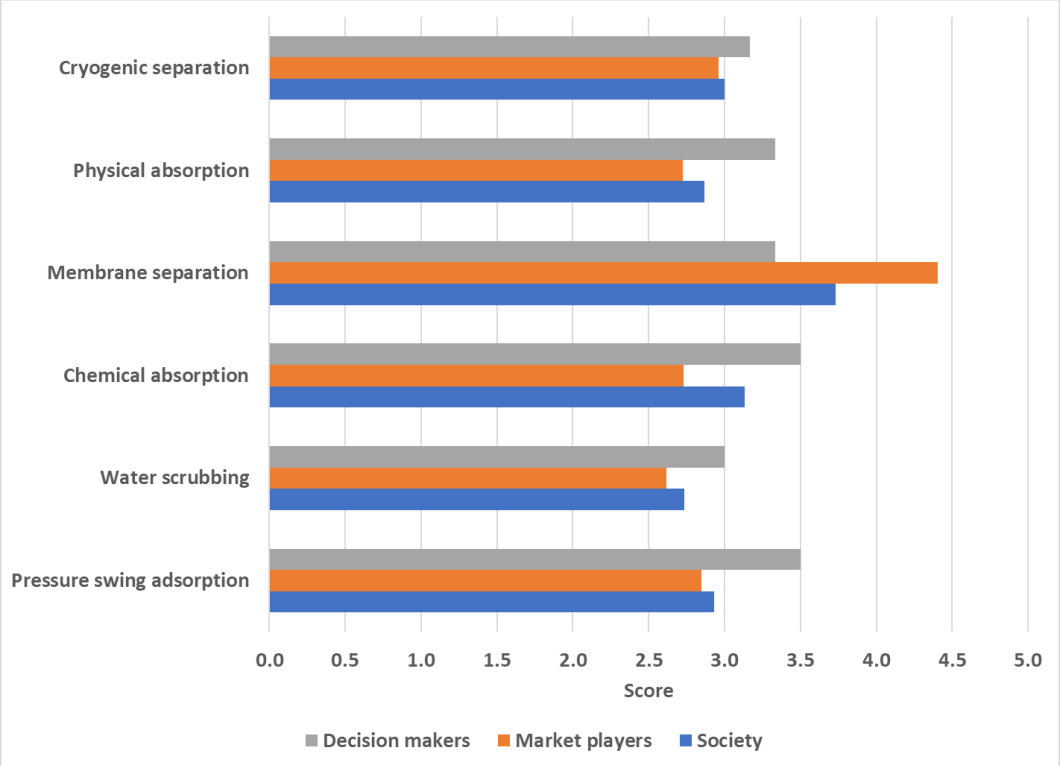

Figure 26 : Degree of utilization of the different upgrading technologies for biomethane production in 2050 in the examined categories of stakeholders.

The distribution grid concentrates the highest probability to be utilized as the main mean for the distribution of biomethane in 2030 from all categories of stakeholders (Figure 27). Moreover, the transportation grid is considered also as an alternative option according to the market players for the period until 2030.

The same conclusion can be derived also for the different connection types for biomethane distribution in 2050 (Figure 28). Nevertheless, the role of the transportation grid will be reinforced significantly in 2050 according to the decision makers and market players. The society does not foresee any essential prospects to the other connection types than the utilization of distribution grid.

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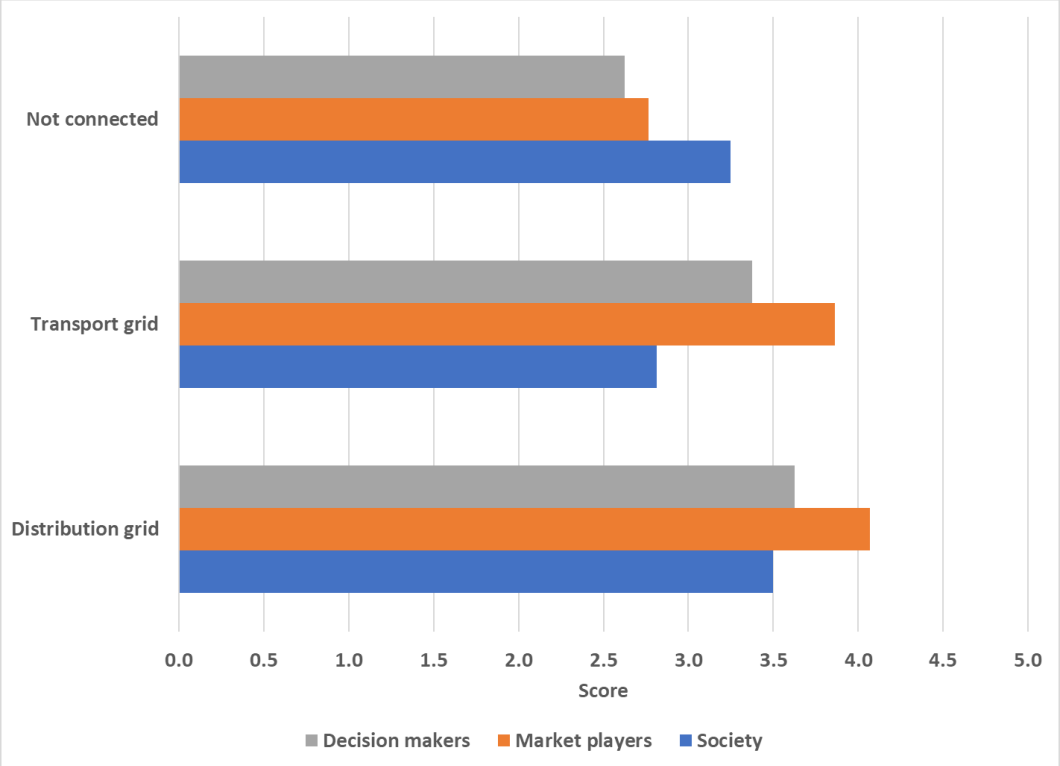

Figure 27 : Probability of using the different connection types for biomethane distribution in 2030 in the examined categories of stakeholders.

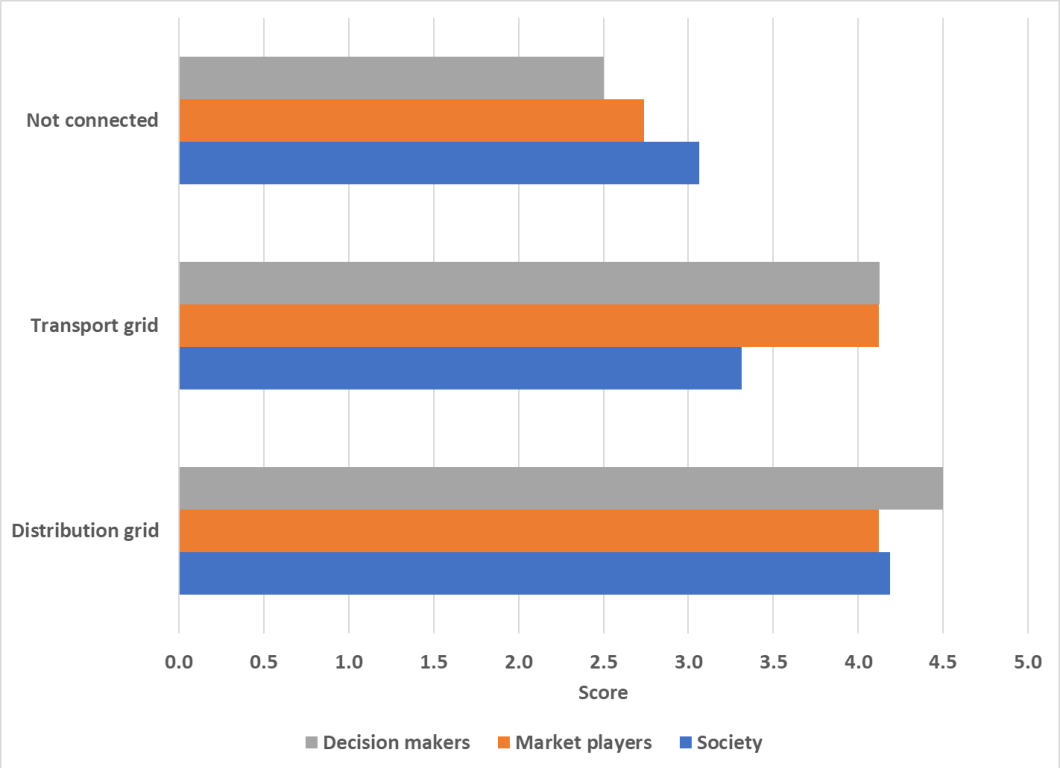

Figure 28 : Probability of using the different connection types for biomethane distribution in 2050 in the examined categories of stakeholders.

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The potential benefits triggered by the biomethane production and consumption are unquestionable by all the examined categories of stakeholders (Figure 29). The improvement of the security of energy supply, the reduction of the CO_2 and CH_4 and potentially N_2O emissions and the energy recovery from waste have been outlined as the most important benefits unanimously by all the involved stakeholders. Moreover, the market players have highlighted the triggered benefits due to the increased waste management, the development of a healthier environment and the fertilizer effect of the manure. Finally, the society recognizes the development of a healthier environment and enhancement of the rural development by creating jobs locally.

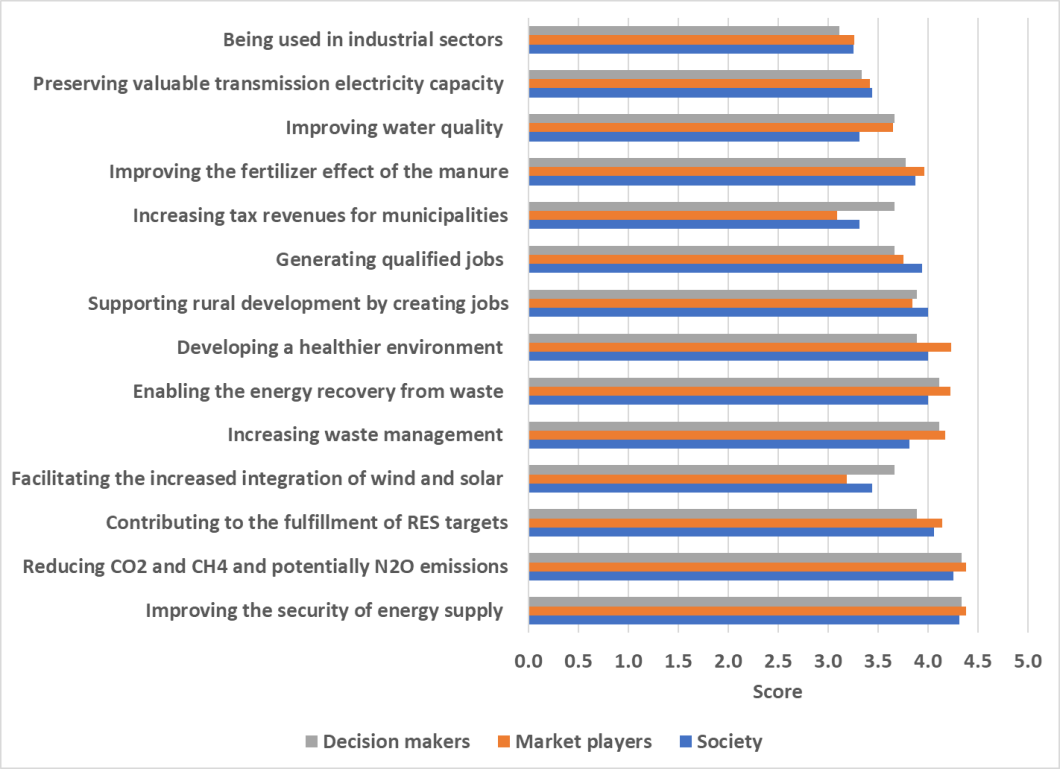

Figure 29 : Significance of the potential benefits triggered by the biomethane production and consumption in the examined categories of stakeholders.

The infrastructural challenges have been identified as the most important technical barrier by all the examined categories of stakeholders (Figure 30). Furthermore, the lack of specialized technical staff and expertise including the limited technical training and knowledge (from decision makers' point of view), the poor collection, improper segregation, lack of vehicles and adequate waste transportation (from society and market players' point of view) and the lack of uniform biomethane quality standards and pipeline interconnection solutions (from society's point of view) have been mapped as additional barriers.

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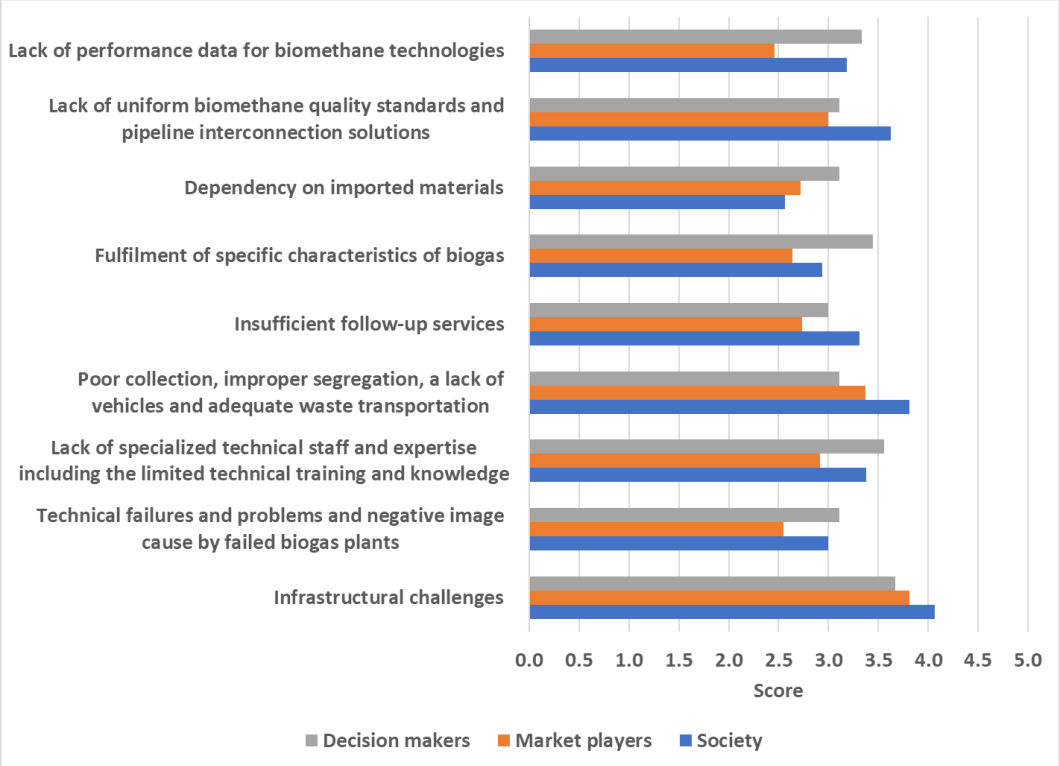

Figure 30 : Importance of the potential technical barriers affecting the biomethane production and consumption in the examined categories of stakeholders.

The most important economic barriers consist of the high investment cost and the high cost to interconnect small biogas projects to natural gas pipeline in all examined categories of stakeholders (Figure 31). Moreover, the lack of subsidies and financial support programmes on a long-term basis has been highlighted by the society and the market players, while the difficulties to exploit the small-scale production of biomethane should be addressed according to the concern that have both the society and the decision makers. Finally, the limited sustainable supply of feedstocks on a long-term period may hinder the further penetration of biomethane according to the society and the decision makers.

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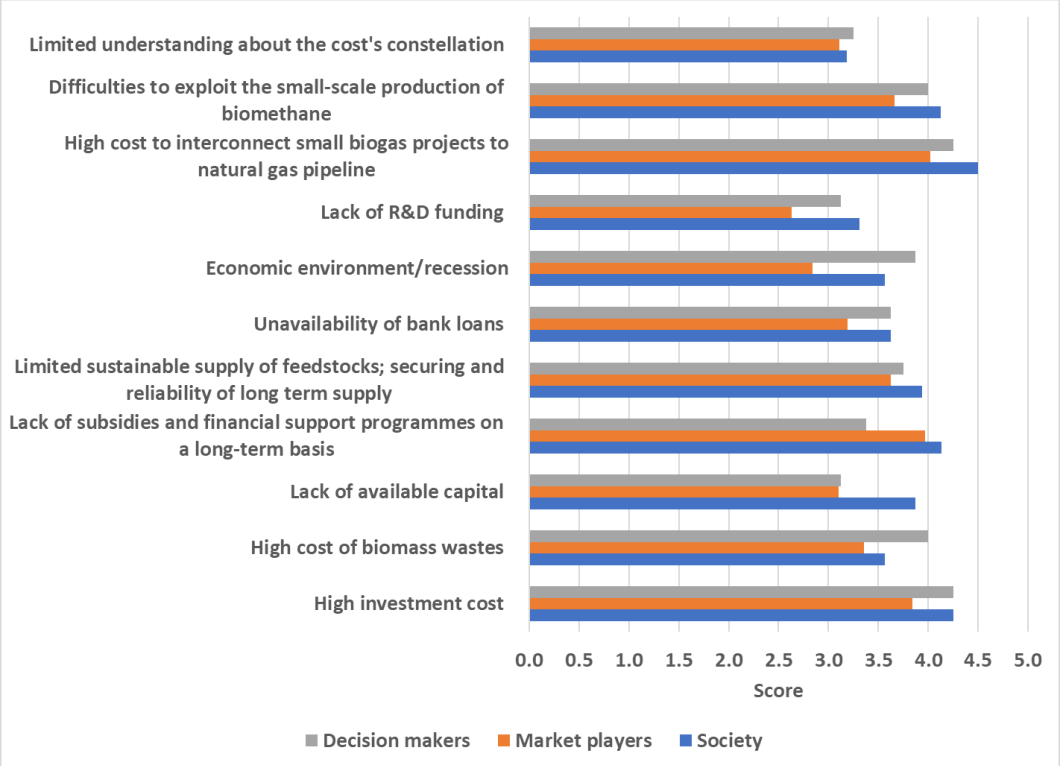

Figure 31 : Importance of the potential economic barriers affecting the biomethane production and consumption in the examined categories of stakeholders.

The high price of biogas/biomethane and the uncertainties and regulatory hurdles related to injection of biogas into the grid have been recognized as the most important market barriers in all examined categories of stakeholders (Figure 32). The large amount of waste feedstocks that is currently not being separately collected and diverted for processing have been identified as barrier by the society and the market players, while the lower prices of fossil fuels have been mentioned by all the stakeholders to a lower extend as a potential market barrier.

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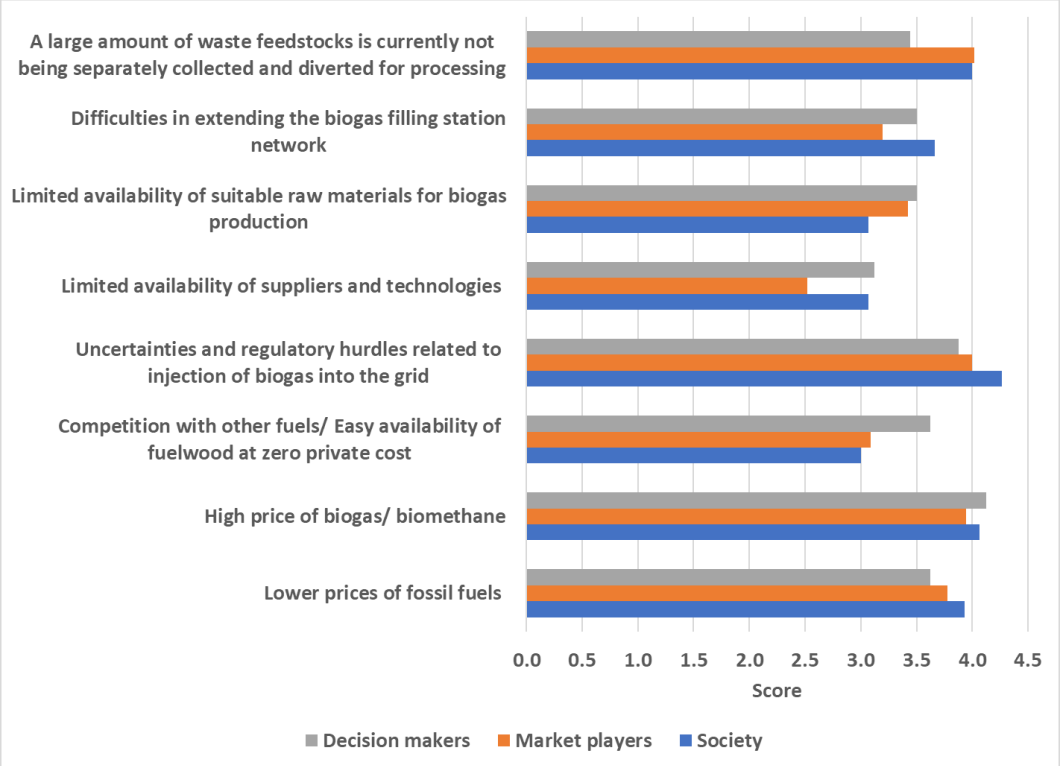

Figure 32 : Importance of the potential market barriers affecting the biomethane production and consumption in the examined categories of stakeholders.

The absence of coordinated policy-making across agriculture, waste management, energy and transport and the lack of political support/legislation have been assessed as the most important institutional barriers affecting the biomethane production and consumption as stated unanimously by all the different categories of stakeholders (Figure 33). The stop-start policy support, the fragmented and conflicting legislative framework and the high level of bureaucracy are considered as important barriers mainly by the society and the market players, while the uncertain policy landscape and the ineffective implementation of the Guarantees of Origin mechanism have been pinpointed by the society as additional barriers.

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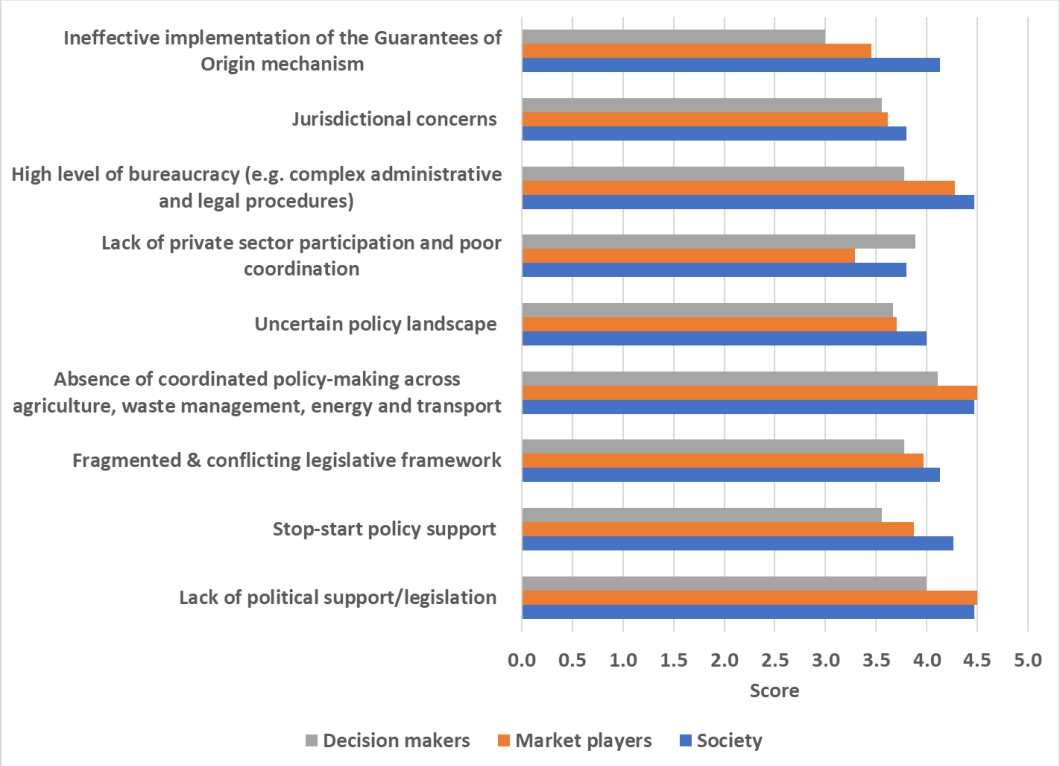

Figure 33 : Importance of the potential institutional barriers affecting the biomethane production and consumption in the examined categories of stakeholders.

All the examined socio-cultural barriers present similar performance irrespective the category of the stakeholders with the exemption of the cultural and religious outlook including stigmatization (Figure 34). It should be noted that the low level of knowledge and limited public awareness has been identified as the most significant barrier from the society and the market players, while the lack of public participation and consumer interest has been highlighted also by the market players. The decision makers perceive almost all the different barriers with equivalent significance.

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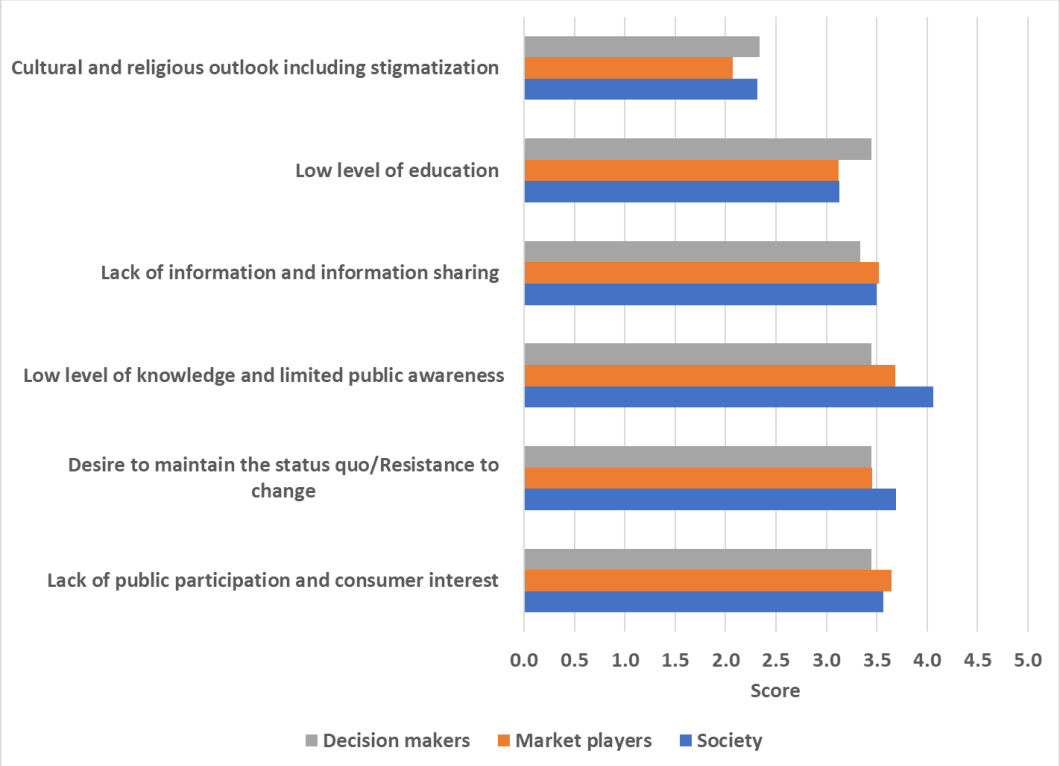

Figure 34 : Importance of the potential socio-cultural barriers affecting the biomethane production and consumption in the examined categories of stakeholders.

The non internalization of the environmental benefits and the odour flying insects' complaints are considered as the most important environmental barriers according to the obtained responses by all examined categories of stakeholders (Figure 35). Furthermore, the lack of environmental data for biomethane technologies has been highlighted also by the decision makers presenting the highest performance among the examined barriers.

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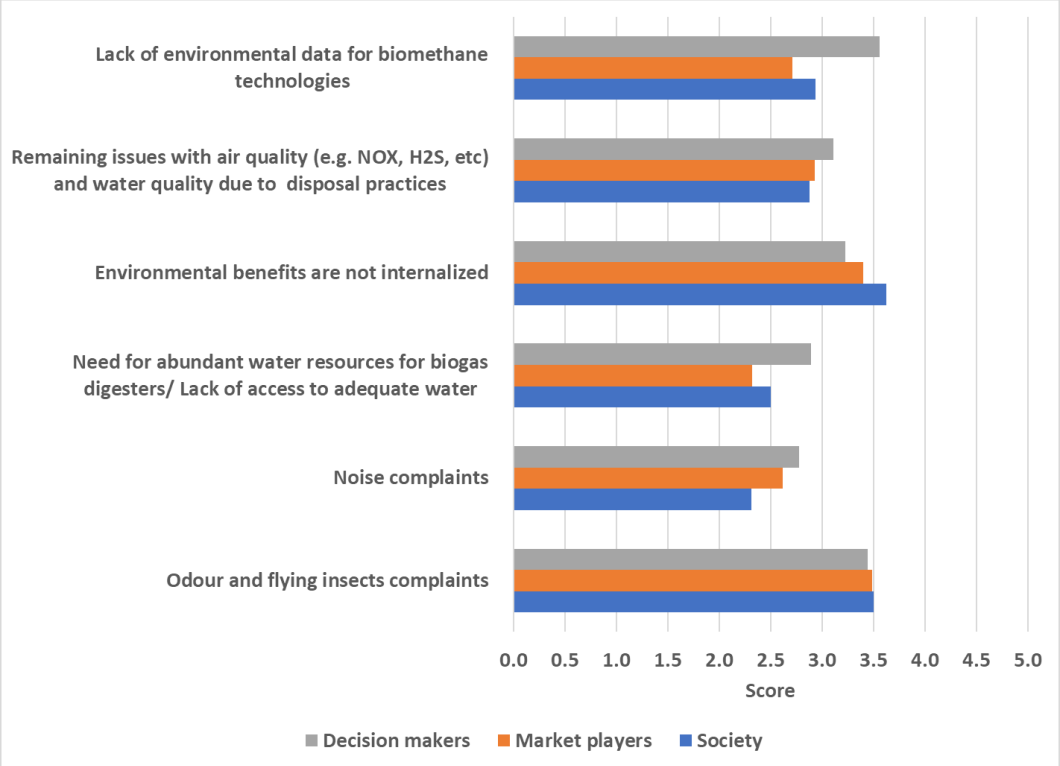

Figure 35 : Importance of the potential environmental barriers affecting the biomethane production and consumption in the examined categories of stakeholders.

The replacement of the natural gas as resulted by the injection of the biomethane into the distribution grid is supported by all examined categories of stakeholders (Figure 36). Moreover, the substitution of the natural gas and the CNG and diesel replacement by bio-CNG for transport fuel usage is preferred also to a lower extend compared to the injection of the biomethane into the distribution grid. The decision makers tend to support the electricity and the combined heat and power production, while the LNG and diesel replacement by bio-LNG for transport fuel usage is supported also by the market players.

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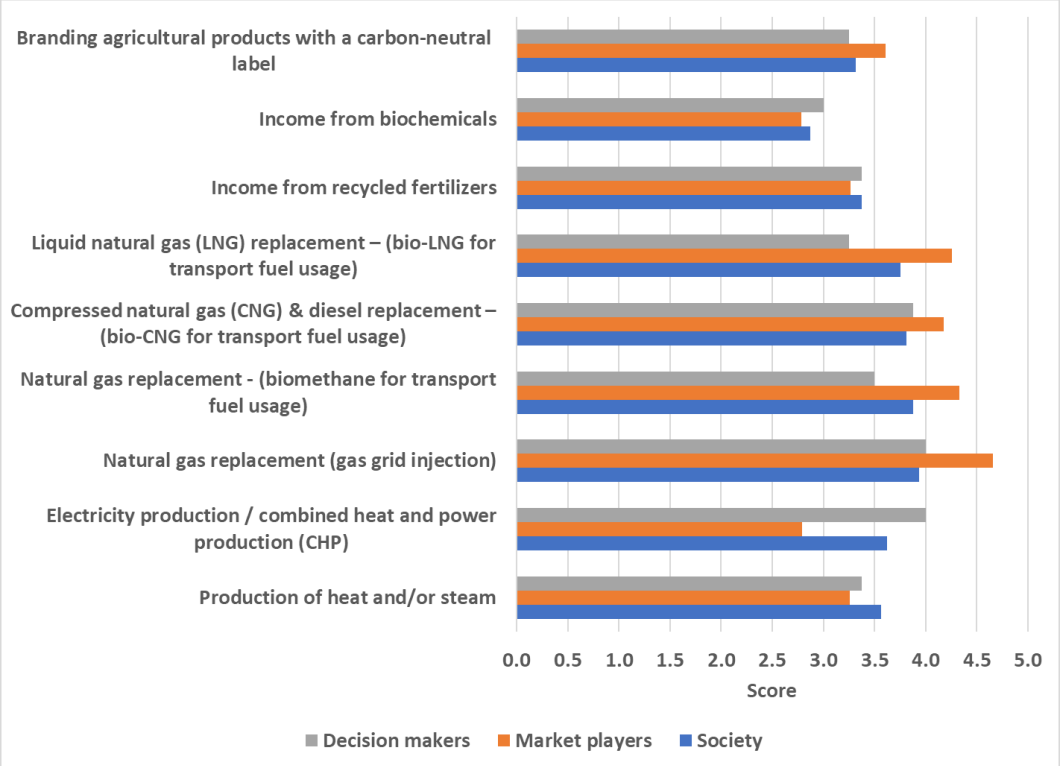

Figure 36 : Probability to utilize the biomethane for the different uses in the examined categories of stakeholders.

The different factors/drivers, which affect the biomethane penetration, seem to have similar performance with minor fluctuations for the all the examined categories of stakeholders (Figure 37). The decision makers believe that the adoption of stricter targets at European level (both CO_2 and RES target) will accelerate the penetration of biomethane, while the introduction of targeted management policy, digestate policy and biogas utilization policy is preferred by the market players along with the imposition of a RES target at national level. Finally, the society supports the specification of stricter CO_2 targets both at European and national level along with the adoption of a targeted biogas utilization policy.

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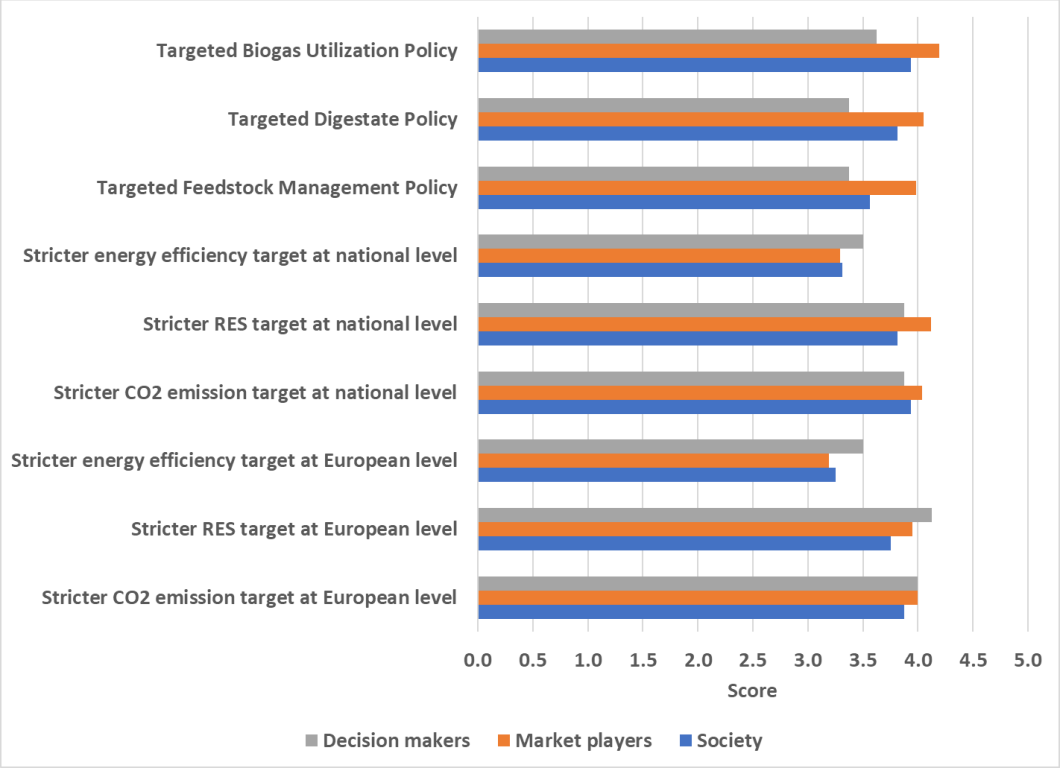

Figure 37 : Effectiveness of the various factors/drivers to the biomethane penetration in the examined categories of stakeholders.

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Chapter 5: Main concluded key policy requirements from the applied methodological approach

The implemented analysis led to the following policy recommendations, which must be taken into consideration during the design of policies and measures for the promotion of the biomethane:

Production side:

- Facilitate the effective exploitation of the agricultural residues, which is the most prevalent feedstock type for biomethane production.
- Focus also on the utilization of industrial wastes, organic municipal solid waste and sewage for biomethane.
- Promote the utilization of membrane separation as the most prevalent upgrading technology for biomethane production.
- Support the maturation and commercialization of other innovative upgrading technologies (e.g., pressure swing adsorption, water scrubbing and cryogenic separation).
- Facilitate the injection of the biomethane into the distribution grid.
- Enable both the injection of the biomethane into the transportation grid and the mobilization of off-grid applications.
- Ensure the sustainable supply of feedstocks on a long-term basis.
- Ensure the acquisition of the environmental data for biomethane technologies.
- Handle the potential odour and flying insects' complaints with transparency and arguments.

Policy and demand side:

- Promote biomethane in order to fulfil 2030's energy and climate targets in all countries.
- Continue the massive penetration of biomethane until 2050.
- Foster the penetration BioLNG-BioCNG and bioH_2 until 2030.
- Prioritize the production of BioLNG-BioCNG and bioH_2 along with the biomethane after 2030.
- Communicate with a coordinated approach all the unquestionable benefits triggered by the biomethane production and consumption.
- Focus on the delivered benefits due to the increased waste management and the exploitation of the various by-products.
- Design measures so as to address the main technical barriers (e.g., the infrastructural challenges and the poor collection, improper segregation, lack of vehicles and adequate waste transportation).
- Reinforce the existing level of knowledge and the skills of the technical staff with the provision of dedicated technical training.
- Launch financial instruments to confront the main economic barriers (e.g. the high investment cost, the lack of subsidies and financial support programmes on a long-

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term basis and the high cost to interconnect small biogas projects to natural gas pipeline).

- Address the main market barriers (e.g., the high price of biogas/biomethane, the uncertainties and regulatory hurdles related to injection of biogas into the grid and the large amount of waste feedstocks that is currently not being separately collected and diverted for processing).
- Establish a coordinated policy-making framework across agriculture, waste management, energy and transport.
- Ensure the continuous political support for the promotion of biomethane and avoid the adoption of the initiation of a fragmented and conflicting legislative framework.
- Reduce the bureaucracy during the construction and operation of the biomethane plants.
- Co-design the required policies and measures with the organization of public consultation procedures so as to increase the interest of the end-users.
- Enhance the existing level of knowledge and the public awareness.
- Internalize the environmental benefits into the fuel prices so as to improve the competitiveness of the biomethane compared to the fossil fuels.
- Expand the type of use so as to include additionally to the replacement of the natural gas from the grid alternative uses, such as indicatively to use bio-CNG or bio-LNG as transport fuels, to produce heat and/or steam, to exploit the recycled fertilizers and to produce branding agricultural products with a carbon-neutral label.
- Adopt stricter CO_2 emission and RES targets at national level than those are foreseen at European level accompanied by targeted feedstock management, digestate and biogas utilization policies.

It should be mentioned that the conducted analyses for the different countries and the different categories of stakeholders led to similar conclusions without major differences.

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Chapter 6: Final list of the key policy requirements in the target countries

After the implementation of the applied methodological approach, the concluded key policy requirements, as resulted by the 5th step, were discussed thoroughly with the involved stakeholders with the framework of the established hubs in GreenMeUp project.

The main objective of these meetings was the update of the current policy framework in the seven target countries considering, assessing and incorporating the most suitable outcomes from the applied methodological approach for each target country separately as presented in Deliverable 2.4 of the GreenMeUp project.

Emphasis was given on identifying the most critical issues, which must be addressed and taken into consideration during the design of the required policy measures, the necessary governmental interventions and the main objectives that should be attained including the expected results and outcomes in the seven target countries.

The final list of the key policy requirements is presented in Table 1 for each target country separately.

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Table 1: Final list with the key policy requirements in the seven target countries.

	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
Czech	Necessity to ensure the existence of a certain level of public support Limited opportunities for indirect support in the biogas/biomethane sector No specifically favorable conditions for PPAs High investment and operating costs of the hydrogen production technologies as well as technologies for the production of bioLPG Considerably high biomethane potential Agricultural and environmental policy is trying to move away from energy crops and replace them with waste in particular, but it is problematic as the energy crops have the highest conversion factor of all feedstocks	Set up financial and institutional support for the development of renewable gas production both for the transformation of existing biogas plants for biomethane production and new biomethane plants, synthetic gas plants and hydrogen production plants, including their connection to the gas grid	No specific target for the biomethane production within the National Energy and Climate Plan Continue the penetration of biomethane The strategy of the Ministry of Agriculture allows for an increase in the energy use of agricultural biomass by up to 20% by 2030, but only on condition that the strategic level of agricultural production for food use is maintained. Emphasis is placed on maximizing the use of bio-waste, including biodegradable municipal waste
Danube region	The untapped potential for biomethane production from industrial waste and sewage remains underutilized By 2030, distribution is expected to rely primarily on the gas grid, underscoring the need for infrastructure readiness Technological adoption remains a challenge, requiring stronger support and advancement The region also faces key environmental and strategic energy issues, including enhancing energy security, cutting greenhouse gas emissions, recovering energy from waste, and raising public awareness	Provide support on the production side to increase the use of industrial waste, sewage, and other feedstocks, along with deploying efficient upgrading technologies like membrane separation and water scrubbing Facilitate biomethane injection into grid and off-grid systems, ensuring sustainable feedstock supply, and strengthening environmental monitoring are critical steps Address the technical barriers such as infrastructure gaps and limited waste transport capacity through targeted investments and workforce training	The envisaged objective of policy interventions is to increase biomethane production and distribution in the Danube region by 2030, with continued growth until 2050 Expected results include strengthened energy security, meaningful reductions in greenhouse gas emissions, improved waste management, and broader environmental benefits By addressing economic, technical, market, and social barriers, these

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
	Economically, securing a stable, long-term feedstock supply is critical, alongside high investment costs and insufficient financial support mechanisms Market barriers include high biomethane prices, regulatory uncertainty around grid injection, and inadequate organic waste collection and processing Policy instability and bureaucratic hurdles further delay project implementation Gaps in policy frameworks include the lack of clear methodologies for biomethane application across sectors, the absence of mandatory blending obligations for natural gas, and the need for regulations on odor control and digestate use Socially, low public awareness, resistance to change, and poor information flow hinder progress Failure to reflect environmental benefits in pricing remains a major obstacle	Promote financial interventions, including long-term support instruments and subsidies to mitigate the high costs Initiate market-based measures to tackle pricing and regulatory uncertainty Establish improved organic waste collection systems to help secure feedstock availability Develop policy frameworks to consider biomethane as a key tool for achieving 2030 and 2050 climate goals, supported by cross-sector coordination across energy, agriculture, waste, and transport Strengthen on the social side public engagement through awareness campaigns and transparent communication Expand biomethane use to transport, heating, steam, fertilizers, and climate-friendly agriculture—and reflect its environmental value in fuel pricing so as to enhance its competitiveness and impact Include the definition of clear methodologies for biomethane applications in (heavy) industry, transport, and energy Strengthen the legal provisions on odor management and facility sitting Facilitate the collaboration between public authorities, private companies, and civil society	overarching policies would develop a robust and competitive biomethane sector that contributes to national climate targets and delivers long-term sustainability for the region To achieve societal acceptance, better alignment with the needs and values of local communities is required Building public trust requires early and inclusive engagement with stakeholders For environmental objectives, the use of digestate can support land bioremediation and promote circular agriculture, while it will improve waste management practices In terms of market development, fostering innovation and facilitating knowledge sharing across sectors can create a supportive ecosystem for the expansion of biomethane

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
Estonia	Absence of regulations that would oblige biowaste or agricultural residues treatment into biogas Uncertainty about biomethane production subsidy Procedures for environmental assessment, building permit, certification of digestate and spatial plan for urban areas are taking too long and hinder sectorial development Concentration of the CNG filling stations in big cities and rural areas are still lacking of CNG/CBM filling options Limited number of LNG/LBM does and as a result many international haulage companies are not upgrading their fleet to LNG/LBM trucks Underdeveloped natural gas grid and lack of sufficient development plans and framework for up-taking the options of biomethane grid injection High investment and operational costs Digestate, which could be treated into valuable fertilizer does not have enough market opportunities and is mostly given back to substrate suppliers for free Certification for digestate takes up to 12 months and is often too complicated so producers are not considering it to be additional revenue stream Long-term profitability of the biomethane units hindering their financing	Set a target for the production of biomethane in 2030 Set the target for 2030 for vehicles using methane and the number of methane filling Support the use of biogas in pilot projects for the use of solid oxide fuel cells (SOFCs), in particular for small-scale installations at source Exempt and differentiate 40% -80% of heavy goods vehicles consuming methane fuel from road tolls in Estonia on the basis of EURO classes Introduce purchase aid for the use of local gas vehicles Exempt of heavy goods vehicle tax for gas vehicles and differentiation on the basis of EURO classes Implement the business tax rebate for biomethane consumption Use of more environmentally friendly biomethane-based transport when purchasing public services Give preference to methane-powered buses in public transport procurement and to build methane filling stations in areas where this is not available for public transport Participate actively in the development of an international quality standard for biomethane Create opportunities for the partial replacement of natural gas with biomethane, synthesis gas or hydrogen in the production of heat	No specific target for the biomethane production within the National Energy and Climate Plan Continue the development of the biomethane market up-taking it from governmental, producer and off-taker side Facilitate the larger usage of biomethane in transport sector the consumption will most likely grow even more in next decades and it will keep creating room for more green gas on the market

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
	Agricultural residues is considered as the main source of the available potential	Establish a functioning incentive scheme for the sorting of municipal and agricultural waste in all municipalities Allow the use of vehicles of higher weight and length in road transport Promote digestate based biofertilizer certification, to support digestate based biofertilizer export. Support power-to-gas technological innovations to double biomethane production Use green CO2 from biomethane upgrading units mixed with green hydrogen (wind, PV, hydro based) Promote liquefied biomethane production (Bio-LNG) with objective substitute LNG by 2050 100%. Promote green hydrogen production from biomethane or via mixing green hydrogen with green biomethane to increase heating value of biomethane not increasing volume and pressure Build state-owned biomethane injection points to natural gas transmission network, which is precondition for biomethane export Use LNG tanker for storage of the liquefied biomethane, to establish state-owned 1 central biomethane liquefication unit	
Greece	Lack of legislative and regulatory framework for the utilization of biomethane	Remove the potential barriers and develop the required legislative and regulatory framework	According to the provisions of the National Energy and Climate Plan the production of biomethane is expected to

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
	Lack of balanced energy cost of biomethane and other incentives to investors Absence of biomass market No regulatory framework for the imposition of gate fee Lack of supply chain of biogas/biomethane Limited number of biogas units (only 38 units out of the 78), which are in close proximity to the natural gas distribution network Difficulties in collecting raw materials (biomass), small units, long distances The estimation of the biomass potential is a difficult process, due to the particularities it presents, and specifically to the difficulty of estimating and recording the elements of the raw material (quantity, availability) with precision and completeness	Provide the appropriate financial incentives to interested investors through a support scheme Specify lighthouse areas and renewable go-to areas for the installation of biomethane production stations at a short distance from the biomass production sites and biomethane injection into the PV distribution networks, in order to limit the biomass storage needs as well as the costs and losses during transport Prioritize the use of biomethane in the distribution networks in relation to natural gas Impose lower charges to end users in relation to the price of natural gas Promote renewable gas certificates from the biomethane produced Create a supply chain through the implementation of targeted actions to collect the required raw materials Design pilot actions for the promotion of compressed and liquefied biomethane in areas not covered by natural gas transmission and distribution systems Conduct information and awareness-raising actions for all interested stakeholders for the further promotion of biomethane Promote and create innovative networks at the local level from the development of biomass/biomethane supply chains with the participation and representation of all interested parties	be equal to 2.1 TWh in 2030, 3.6 TWh in 2040 and 4.6 TWh in 2050 Initiate and increase the penetration of biomethane

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
Latvia	Absence of well-defined roadmaps Absence of short-, medium-, and long-term ambitious and binding biomethane production targets Lack of initiatives to minimize public resistance Delays in the adoption of the Transport Energy law and in the full transposition of RED II Lack of incentives to support the biomethane or biogas production Absence of legislation to promote biomethane in the transport sector Fragmented availability of agricultural feedstock Insufficient biowaste management practices limiting the utilization of the available feedstock Significant bureaucratic burden during the utilization of feedstock for biogas production Non-fixed short-term contracts with feedstock providers Constraints by the oxygen volume limits (≤0.02% for international pipelines) when connecting to the transmission system Constraints by the consumption capacity in the distribution system High connection cost to the gas grid without any existing incentives for biomethane producers Absence of an established certification mechanism or national registry for biogas/biomethane	Develop a comprehensive biogas and biomethane strategy Design and implement supportive policies and regulatory frameworks Promote the conversion of existing biogas facilities to biomethane Conduct awareness and education campaigns Enhance the involvement of public procurement and local governments as catalysts in initiating the development of the biomethane market Strengthen the legal framework pertaining to nutrient recovery, encompassing responsibilities, rights, and incentives Enhance the accessibility of biogas and biomethane in the transport sector, potentially through the implementation of guarantees of origin and sustainability certificates Adjust the procurement support for heavy transport and municipal public transport vehicles, incorporating the obligation to utilize biogas during the initial years Foster an increased demand for biomethane for industrial applications Exploit the significant portion of the overall potential, which is attributed to the processing of livestock manure	No specific target for the biomethane production within the National Energy and Climate Plan Foster the development of the biomethane market Support the utilization of the biomethane in the transport and heat sectors, with a focus on replacing natural gas

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
	Uncertainty about the accounting of the injected biomethane The predominant practice among biogas plant operators involves utilizing self-produced feedstock, consisting of crop residues and animal manure. In many cases feedstock is sourced from neighbouring farms and supplied to biogas plants through long-term contracts, employing volume-based pricing mechanisms		
Poland	Quite complex process to invest in biogas/biomethane installation is a, from the technical, logistic, economic and legal point of view Significant delays in the introduction of regulations; lack of support system for larger biomethane installations (> 1 MW)/ Problems with obtaining administrative permissions Problems with obtaining conditions for connection to the electricity and gas grids Technical problems with the new technology, which has not been serviced in Poland so far Termination of acceptance of biomethane into the gas grid in case of minimal quality deviations - disruption of supplies to customers Lack of knowledge in the society about the importance, potential and environmental and economic impact of this type of plant, lack of acceptance for biogas plants (not in my yard attempt)	Introduce support for new investments Adapt the gas infrastructure to receive biomethane Promote the use of digestate in agriculture Legislative and financial facilitation of the planned investments Raise awareness among local communities	Initiate and increase biomethane production - target increase in biomethane production capacity adopted according to the draft National Energy and Climate Plan (of 2024) from 1335 ktoe (15 TWh) in 2030 to 3483 ktoe (40 TWh) in 2040

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
	– more than 100 protests against biogas plants in their village/ municipality) Lack of knowledge in society about the importance, potential and environmental and economic impact of this type of plant is causing protests against building of biogas plants in several locations Large biomethane potential resulting e.g. from agri-food industry, the main supplier of the substrates for biogas plants		
Spain	Specification of unambitious targets Minor developments have been initiated Limited financial support is provided, which is not aligned with the provisions of the EC Absence of the GoO system Too complex and slow permitting processes, due to high atomization of delegation of competences and lack of skills of civil servants in charge of Limited number of electrical biogas plants which could be converted to biomethane plants without any financial support Request for approving support mechanisms for renewable gas and its injection into the gas grid Growing social rejection, headed by ecological organizations, mainly against large biomethane projects	Implementation of a biomethane consumption quota system for gas traders, similar to the obligations already established for liquid biofuels Provide financial support for accelerating the consumption of biomethane (e.g. such as indicative subsidies, fiscal measures etc.) Adopt a stable regulatory framework Adopt a robust legal framework for sanitary and environmental control, covering both input materials and the storage and application of digestate Provide incentives for biogas upgrading infrastructures and biomethane injection infrastructures Encourage the operation of Reverse Flow Units Introducing waste management policies Establish the GoO system Draft a realistic roadmap	The biomethane target is established within the framework of the National Energy and Climate Plan as “minimum” 1% biomethane over gas consumption by 2030 Nevertheless, the annual biomethane production/consumption can be increased to 10% over gas consumption by 2030

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	Key issues under consideration	Type of examined governmental interventions	Policy objectives and expected results
	High additional potential capacity to produce biomethane until 2030 No plan regarding indirect investment and production support and demand side incentives	Due to gaps in Spanish regulation in safety and risk management, it is advisable to adopt safety protocols from leading EU countries, using stricter benchmarks where national rules are still under development Initiate clear, replicable and homogeneous permitting processes Early-stage collaboration is essential for overcoming social resistance and accelerating permitting Need for greater coordination to biogas/biomethane integrated solutions to joint problems (environmental + agricultural + livestock + demographics + energy + climate change)	

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Annex: Questionnaire: Identification of the key policy requirements for biomethane market uptake

Name of the stakeholder:	
Institution/Organisation:	
Position:	
Country:	
1. Please assess the potential role of the following alternative fuels to the fulfilment of the 2030's energy and climate targets. ***(Scale for scoring 5: Very important, 4: Important, 3: Medium important, 2: Unimportant, 1: Very unimportant)***	
Biogas	
Biomethane	
BioLNG-BioCNG	
$BioH_2$	
Additional comments (please insert):	
2. Please assess the potential role of the following alternative fuels to the fulfilment of the 2050's energy and climate targets. ***(Scale for scoring 5: Very important, 4: Important, 3: Medium important, 2: Unimportant, 1: Very unimportant)***	
Biogas	
Biomethane	
BioLNG-BioCNG	
$BioH_2$	
Additional comments (please insert):	
3. Please assess the degree of exploitation of the following feedstock types for biomethane production in 2030. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Agricultural residues	
Sequential cropping	
Energy cops	
Sewage	
Landfill	
Organic municipal solid waste	
Industrial (food and drink)	
Other (please specify):	
Additional comments (please insert):	
4. Please assess the degree of exploitation of the following feedstock types for biomethane production in 2050. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	

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Agricultural residues	
Sequential cropping	
Energy cops	
Sewage	
Landfill	
Organic municipal solid waste	
Industrial (food and drink)	
Other (please specify):	
Additional comments (please insert):	
5. Please assess the degree of utilization of the following upgrading technologies for biomethane production in 2030. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Pressure swing adsorption	
Water scrubbing	
Chemical absorption	
Membrane separation	
Physical absorption	
Cryogenic separation	
Other (please specify):	
Additional comments (please insert):	
6. Please assess the degree of utilization of the following upgrading technologies for biomethane production in 2050. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Pressure swing adsorption	
Water scrubbing	
Chemical absorption	
Membrane separation	
Physical absorption	
Cryogenic separation	
Other (please specify):	
Additional comments (please insert):	
7. Please assess the probability of using the following connection types for biomethane distribution in 2030. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Distribution grid	
Transport grid	
Not connected	
Other (please specify):	
Additional comments (please insert):	
8. Please assess the probability of using the following connection types for biomethane distribution in 2050. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	

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Distribution grid	
Transport grid	
Not connected	
Other (please specify):	
Additional comments (please insert):	
9. Please assess the significance of the potential benefits triggered by the biomethane production and consumption. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Improving the security of energy supply by increasing indigenous production and reducing dependence on fossil fuel	
Reducing CO_2 and CH_4 and potentially N_2O emissions	
Contributing to the fulfilment of RES targets	
Facilitating the increased integration of wind and solar by proving flexibility	
Increasing the cost-effectiveness of waste management by using organic waste	
Enabling the energy recovery from waste	
Developing a healthier environment for future generations	
Supporting rural development by creating jobs in the rural economy	
Generating qualified jobs in planning, engineering, operating and maintaining of biogas and biomethane plants	
Increasing tax revenues for municipalities	
Improving the fertilizer effect of the manure by degasifying it and as a result increases the crops yield	
Improving water quality by reducing nitrogen discharge	
Preserving valuable transmission capacity for the delivery of wind and solar energy and optimizing public investments due to the fact that existing natural gas pipelines are utilized	
Being used in industrial sectors (e.g. iron-ore reduction processes and	

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production of short chain olefins in chemical industries)	
Other (please specify):	
Additional comments (please insert):	
10. Please assess the importance of the potential technical barriers affecting the biomethane production and consumption. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Infrastructural challenges (e.g. plant size, lack of resource availability, limited number of gas filling stations)	
Technical failures and problems and negative image cause by failed biogas plants	
Lack of specialized technical staff and expertise including the limited technical training and knowledge	
Poor collection, improper segregation, a lack of vehicles and adequate waste transportation	
Insufficient follow-up services	
Fulfilment of specific characteristics of biogas	
Dependency on imported materials	
Lack of uniform biomethane quality standards and pipeline interconnection solutions	
Lack of performance data for biomethane technologies	
Other (please specify):	
Additional comments (please insert):	
11. Please assess the importance of the potential economic barriers affecting the biomethane production and consumption. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
High investment cost of biogas production, transportation, clean-up, and upgrading	
High cost of biomass wastes (and other feedstock for co-digestion) including the high transportation cost of these feedstocks	
Lack of available capital	
Lack of subsidies and financial support programmes on a long-term basis (incl. fossil fuel subsidization)	

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Limited sustainable supply of feedstocks; securing and reliability of long-term supply	
Unavailability of bank loans (incl. with preferential terms)	
Economic environment/recession	
Lack of R&D funding	
High cost to interconnect small biogas projects to natural gas pipeline	
Difficulties to exploit the small-scale production of biomethane due to the fact that the natural gas grids have been designed to transport gas from large point sources to densely populated regions	
Limited understanding about the cost's constellation of the procedures for the production and injection of biomethane	
Other (please specify):	
Additional comments (please insert):	
12. Please assess the importance of the potential market barriers affecting the biomethane production and consumption. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Lower prices of fossil fuels	
High price of biogas/ biomethane	
Competition with other fuels/ Easy availability of fuelwood at zero private cost	
Uncertainties and regulatory hurdles related to injection of biogas into the grid	
Limited availability of suppliers and technologies	
Limited availability of suitable raw materials for biogas production	
Difficulties in extending the biogas filling station network	
A large amount of waste feedstocks is currently not being separately collected and diverted for processing	
Other (please specify):	
Additional comments (please insert):	

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13. Please assess the importance of the potential institutional barriers affecting the biomethane production and consumption. *(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)*	
Lack of political support/legislation	
Stop-start policy support	
Fragmented & conflicting legislative framework	
Absence of coordinated policy-making across agriculture, waste management, energy and transport	
Uncertain policy landscape (incl. political instability)	
Lack of private sector participation and poor coordination between the public and the private sectors	
High level of bureaucracy (e.g. complex administrative and legal procedures)	
Jurisdictional concerns should be addressed regarding waste ownerships, disposals, landfill gas concessions etc.	
Ineffective implementation of the Guarantees of Origin mechanism	
Other (please specify):	
Additional comments (please insert):	
14. Please assess the importance of the potential socio-cultural barriers affecting the biomethane production and consumption. *(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)*	
Lack of public participation and consumer interest	
Desire to maintain the status quo/Resistance to change	
Low level of knowledge and limited public awareness	
Lack of information and information sharing	
Low level of education	
Cultural and religious outlook including stigmatization	
Other (please specify):	
Additional comments (please insert):	
15. Please assess the importance of the potential environmental barriers affecting the biomethane production and consumption. *(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)*	

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Odour and flying insects complaints	
Noise complaints	
Need for abundant water resources for biogas digesters/ Lack of access to adequate water	
Environmental benefits are not internalized	
Remaining issues with air quality (e.g. NOX, H_2S, etc) and water quality due to disposal practices	
Lack of environmental data for biomethane technologies	
Other (please specify):	
Additional comments (please insert):	
16. Please assess the probability to utilize the biomethane for the following uses. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Production of heat and/or steam	
Electricity production / combined heat and power production (CHP)	
Natural gas replacement (gas grid injection)	
Natural gas replacement - (biomethane for transport fuel usage)	
Compressed natural gas (CNG) & diesel replacement – (bio-CNG for transport fuel usage)	
Liquid natural gas (LNG) replacement – (bio-LNG for transport fuel usage)	
Income from recycled fertilizers	
Income from biochemicals	
Branding agricultural products with a carbon-neutral label	
Other (please specify):	
Additional comments (please insert):	
17. Please assess the effectiveness of the various factors/drivers to the biomethane penetration. ***(Scale for scoring 5: Very high, 4: High, 3: Medium, 2: Low, 1: Very low)***	
Stricter CO_2 emission target at European level	
Stricter RES target at European level	
Stricter energy efficiency target at European level	
Stricter CO_2 emission target at national level	
Stricter RES target at national level	

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Stricter energy efficiency target at national level	
Targeted Feedstock Management Policy	
Targeted Digestate Policy	
Targeted Biogas Utilization Policy	
Other (please specify):	
Additional comments (please insert):	

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