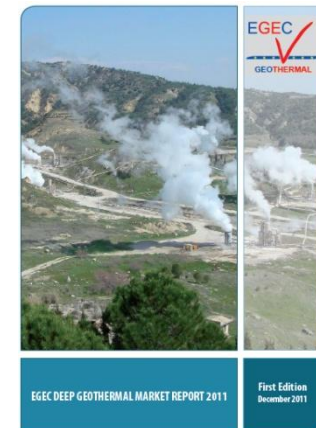




Geothermal District Heating Market in Europe

*Launch of the EGEC Deep Geothermal
Market Report @ GeoPower Europe 2011*



Christian Boissavy, AFPG



Summary of Key Conclusions

Increasing Momentum

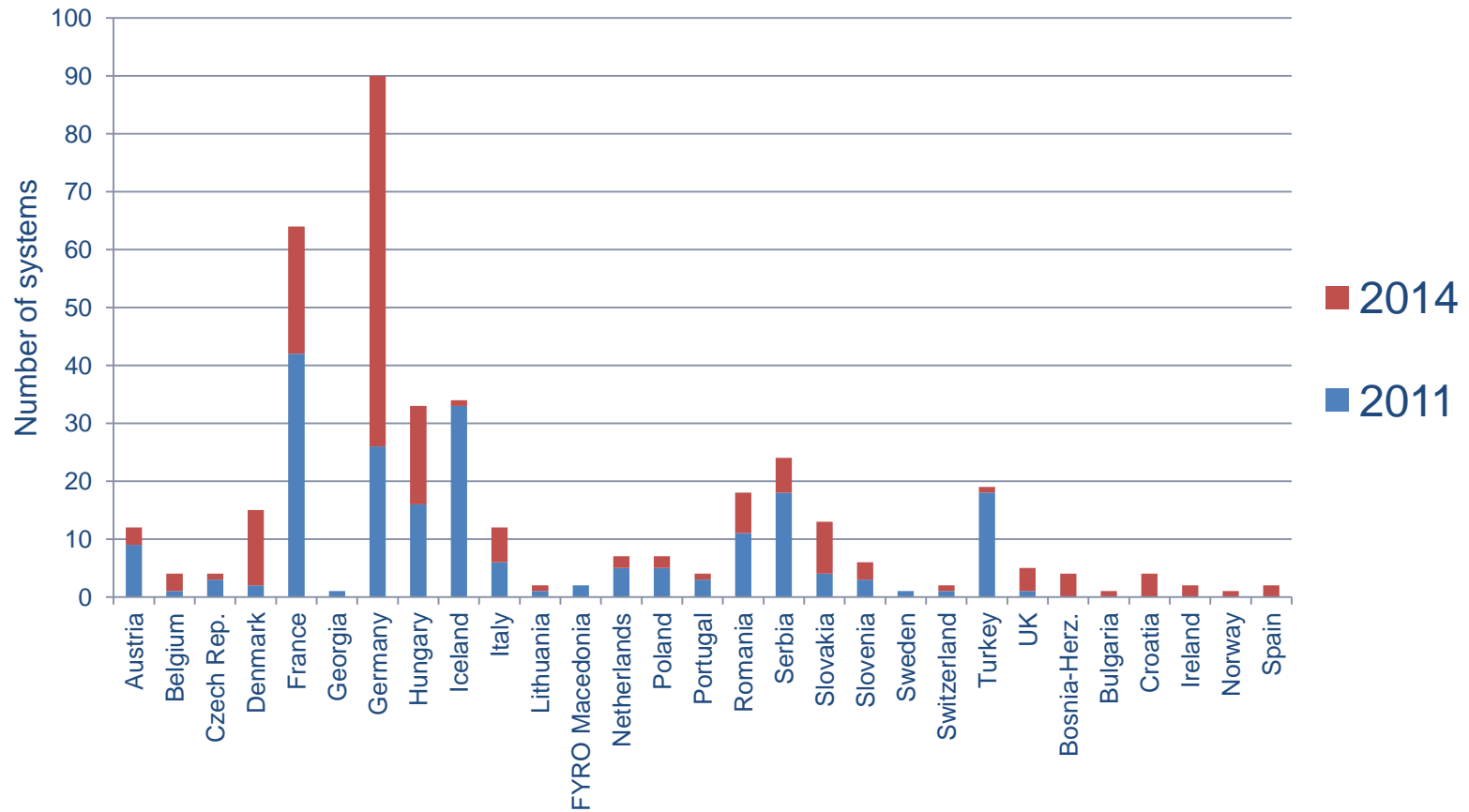
- 212 GeoDH systems in operation in Europe
- Total capacity of approx. 4,700 MWth

Geothermal Attractive Option for H&C

- Competitive
- Can be installed everywhere



GeoDH Systems in Europe





Hot Facts

Main GeoDH markets today are in France (42 systems), Iceland (33), Germany (26) and Hungary (16).

Hot markets are mainly in Germany (64 new systems developed), France (22 new systems), Hungary (17) and Denmark (13).

New entrants to the market are Bosnia-Herz., Bulgaria, Croatia, Ireland, Norway and Spain.

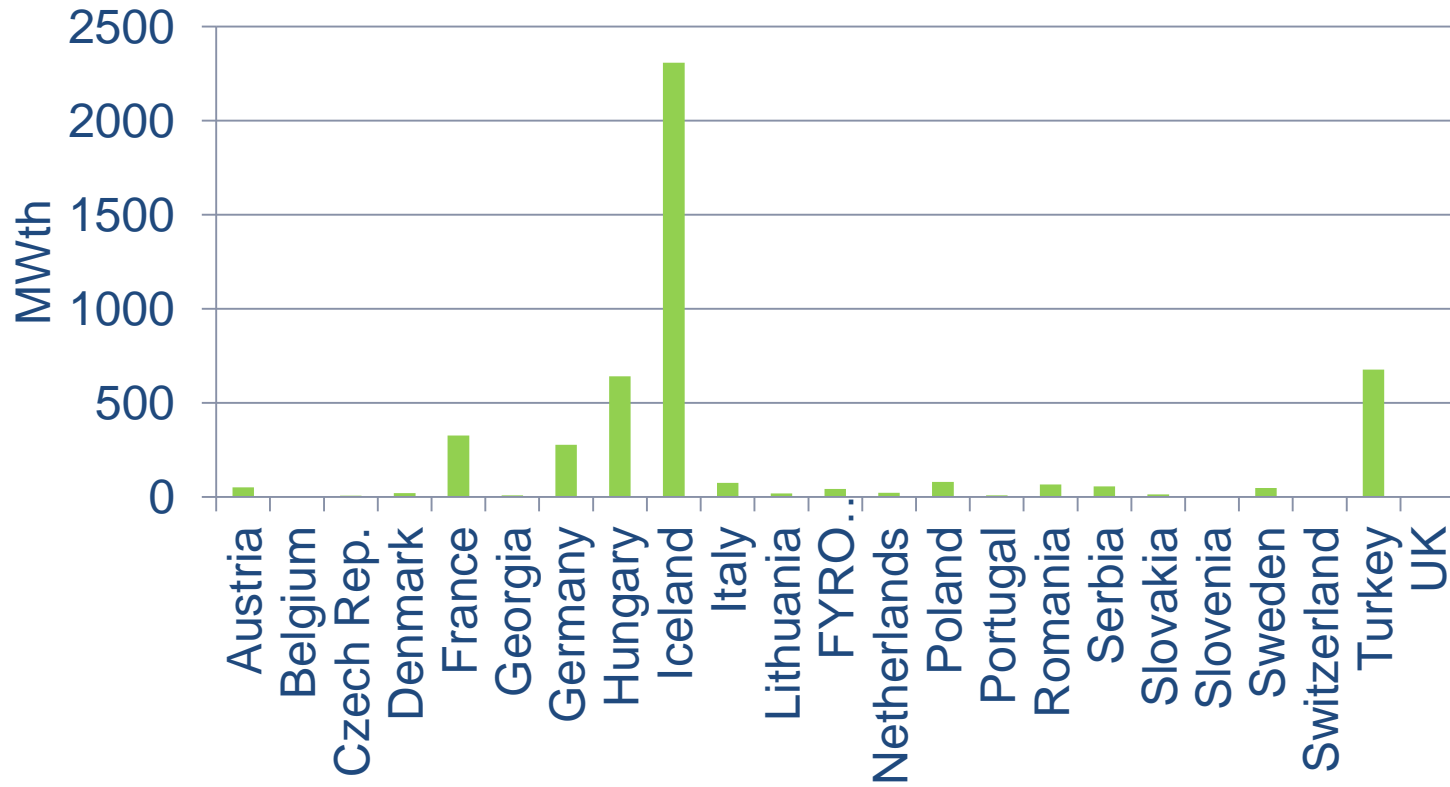
CHP plants represent already a 500 MWth capacity for heating.

EGS development with CHP systems provides further opportunity for GeoDH systems (more than a150 MWth capacity).

Almost all European countries (29) have geothermal activity.



GeoDH Installed Capacity in Europe





Future of GeoDH in Europe

By 2015



200 New
Plants



Ca. 4,000
MWth



Conclusion: 3 Factors....

