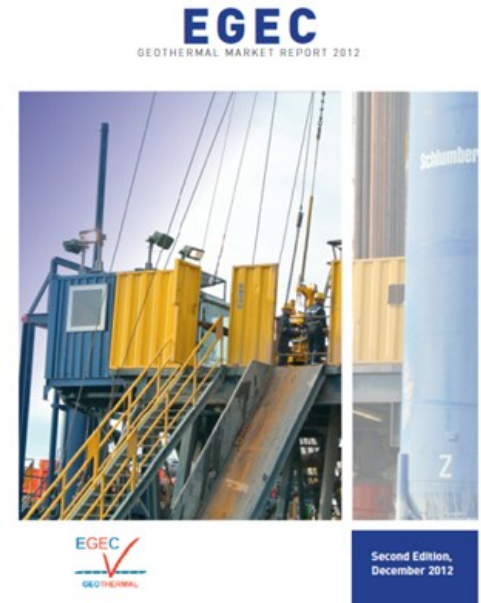




Geothermal District Heating Market in Europe

*Launch of the EGEC Geothermal
Market Report 2012
@ GeoPower Europe 2012*

Miklos Antics, GPC IP





Summary of Key Conclusions

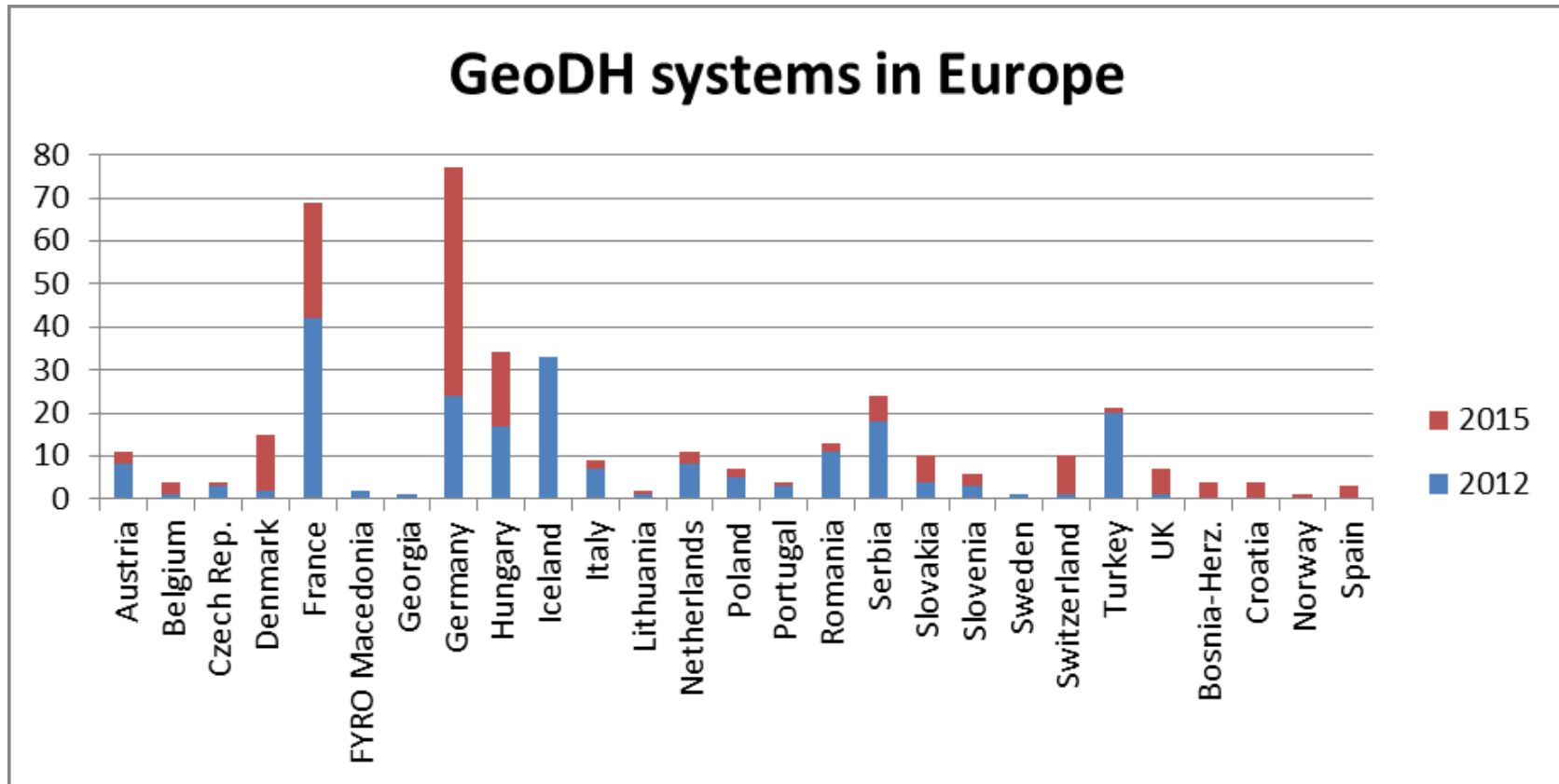
Increasing Momentum

- 216 GeoDH systems in operation in Europe
- Total capacity of approx. 4,900 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 (24), Turkey (20) and Hungary (17).

Hot markets are mainly in Germany (53 new systems developed), France (27 new systems), Hungary (17) and Denmark (13).

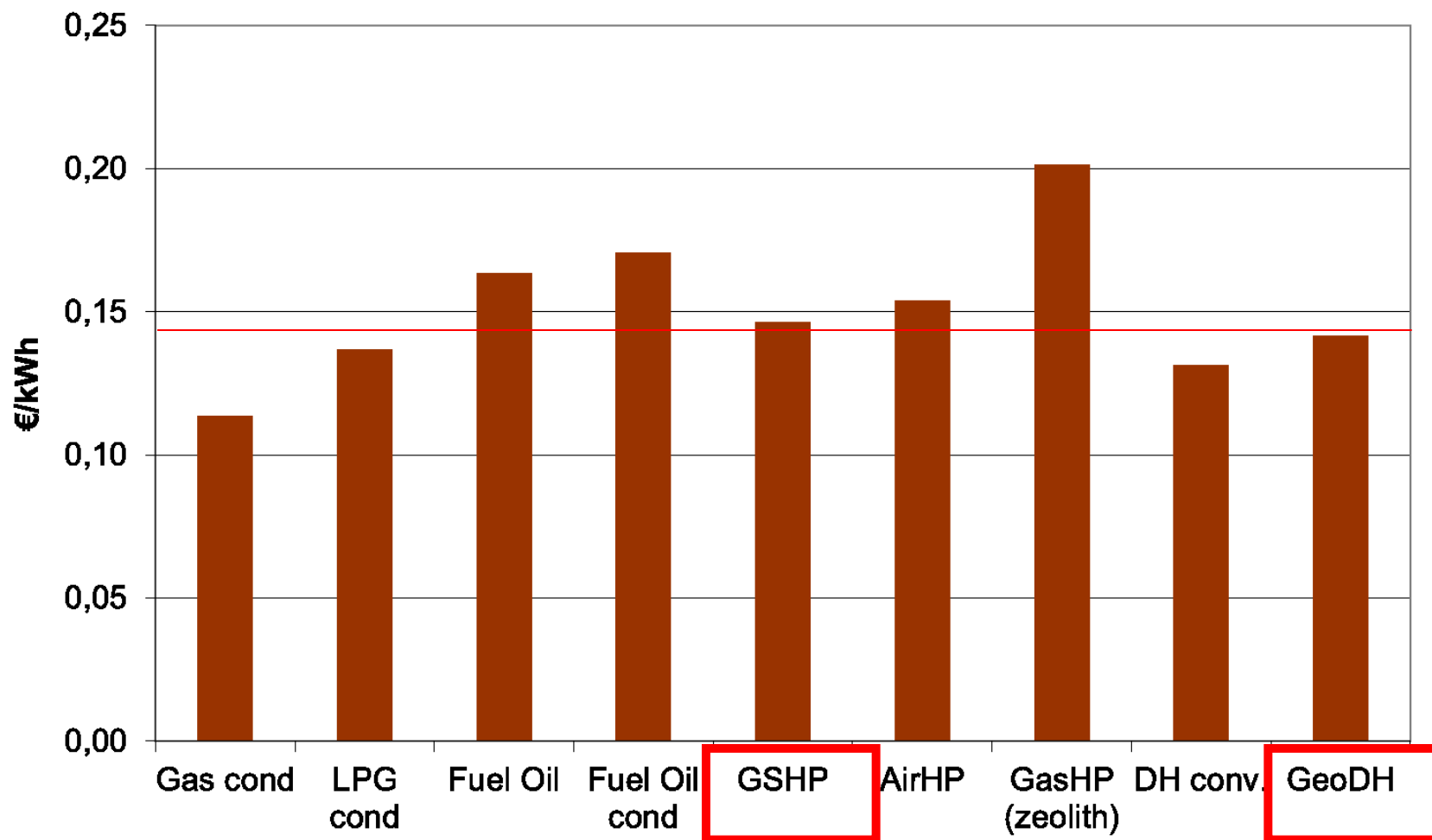
New entrants to the market are Bosnia-Herz., Croatia, Norway and Spain.

CHP plants represent already a 900 MWth capacity for heating.

EGS development with CHP systems provides further opportunity for GeoDH systems (more than 150 MWth capacity).

Almost all European countries (29) have geothermal activity.

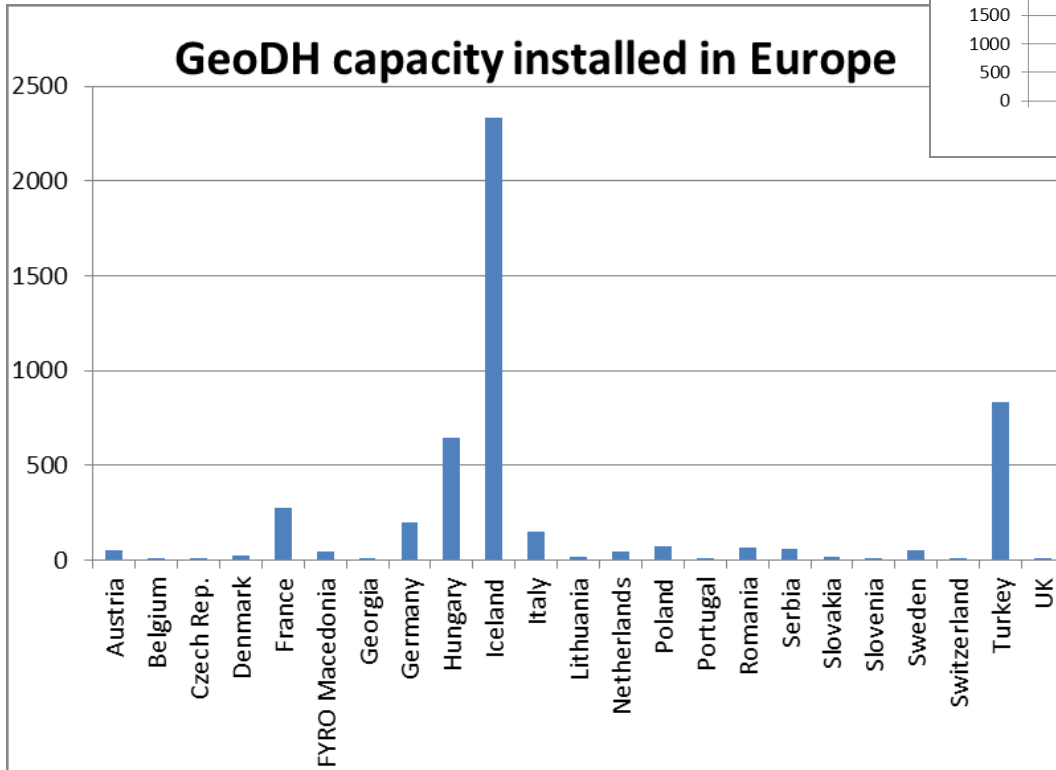
Full cost of Heat, calculated for small building or flat



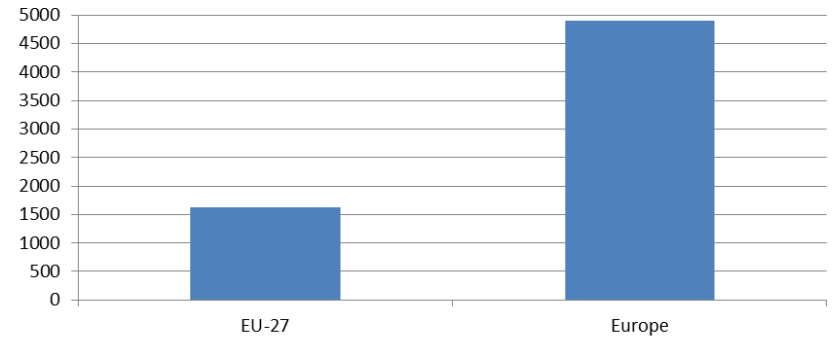


GeoDH Installed Capacity in Europe

GeoDH capacity installed in Europe



GeoDH Installed capacity in Europe and the EU (MWth)





Future of GeoDH in Europe

By 2015



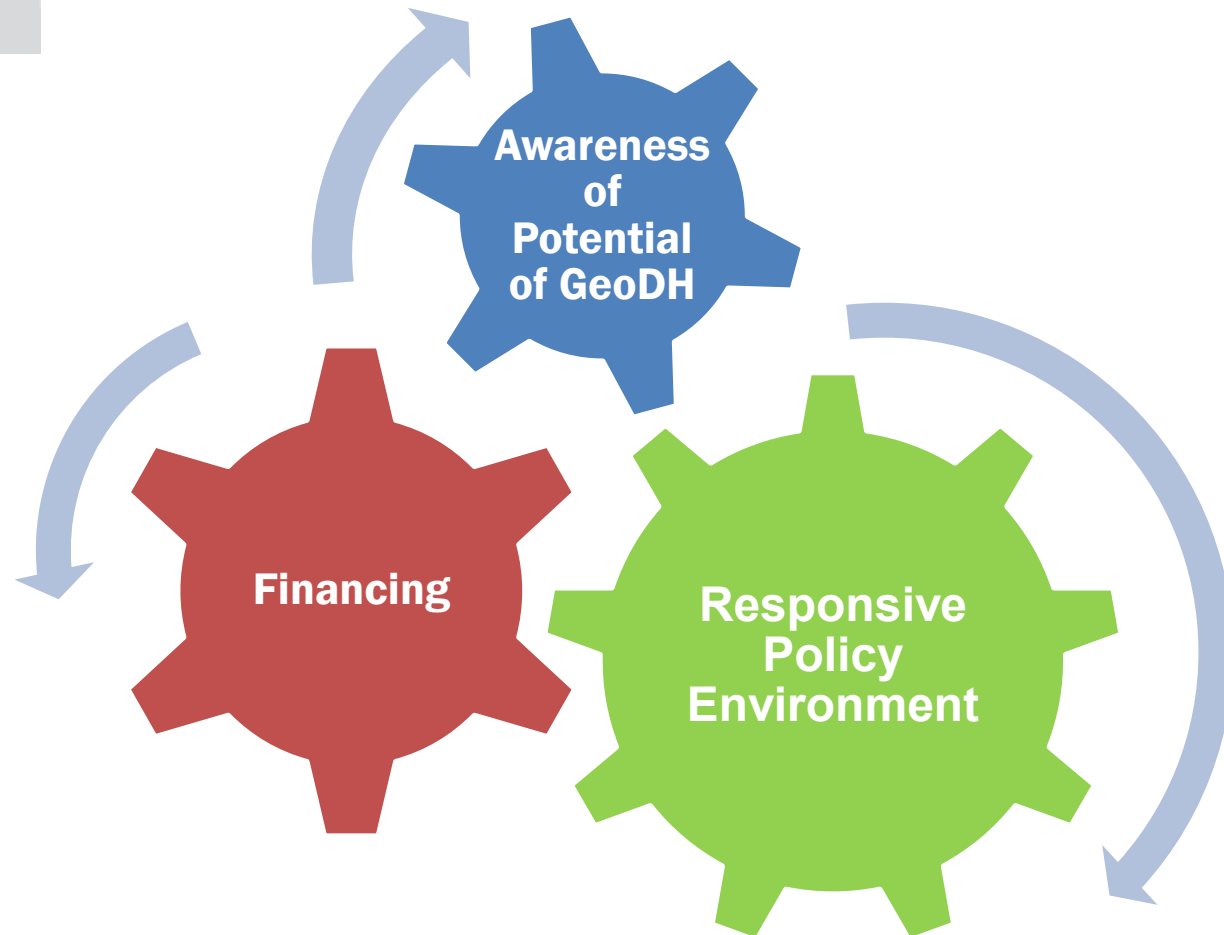
170 New
Plants



Ca. 4,000
MWth

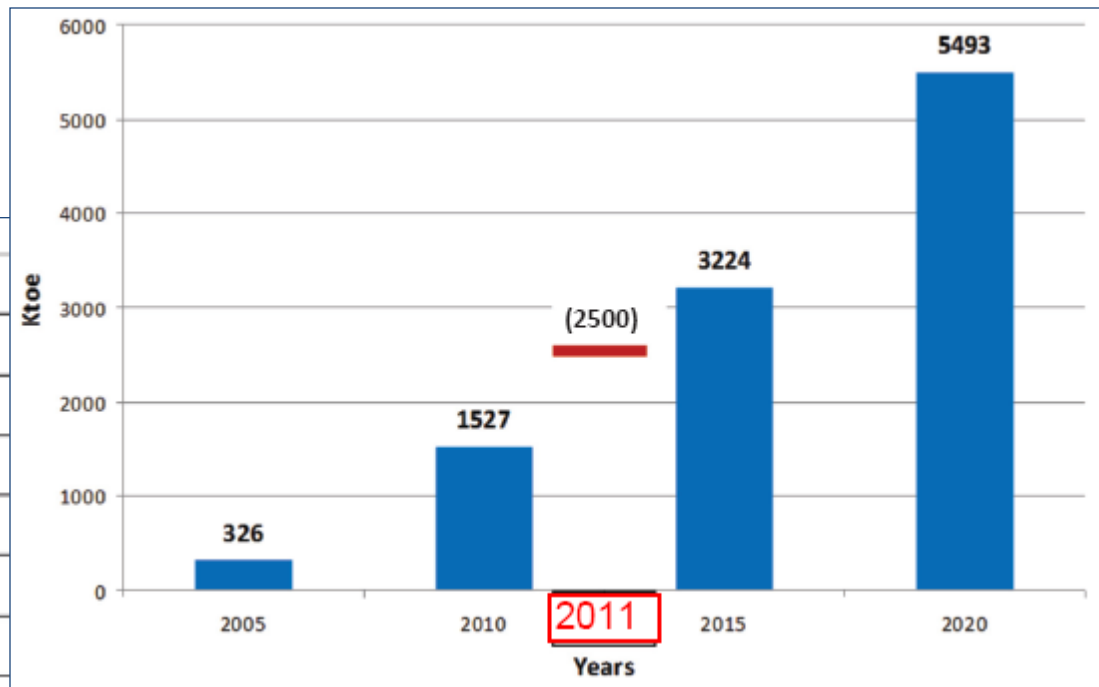
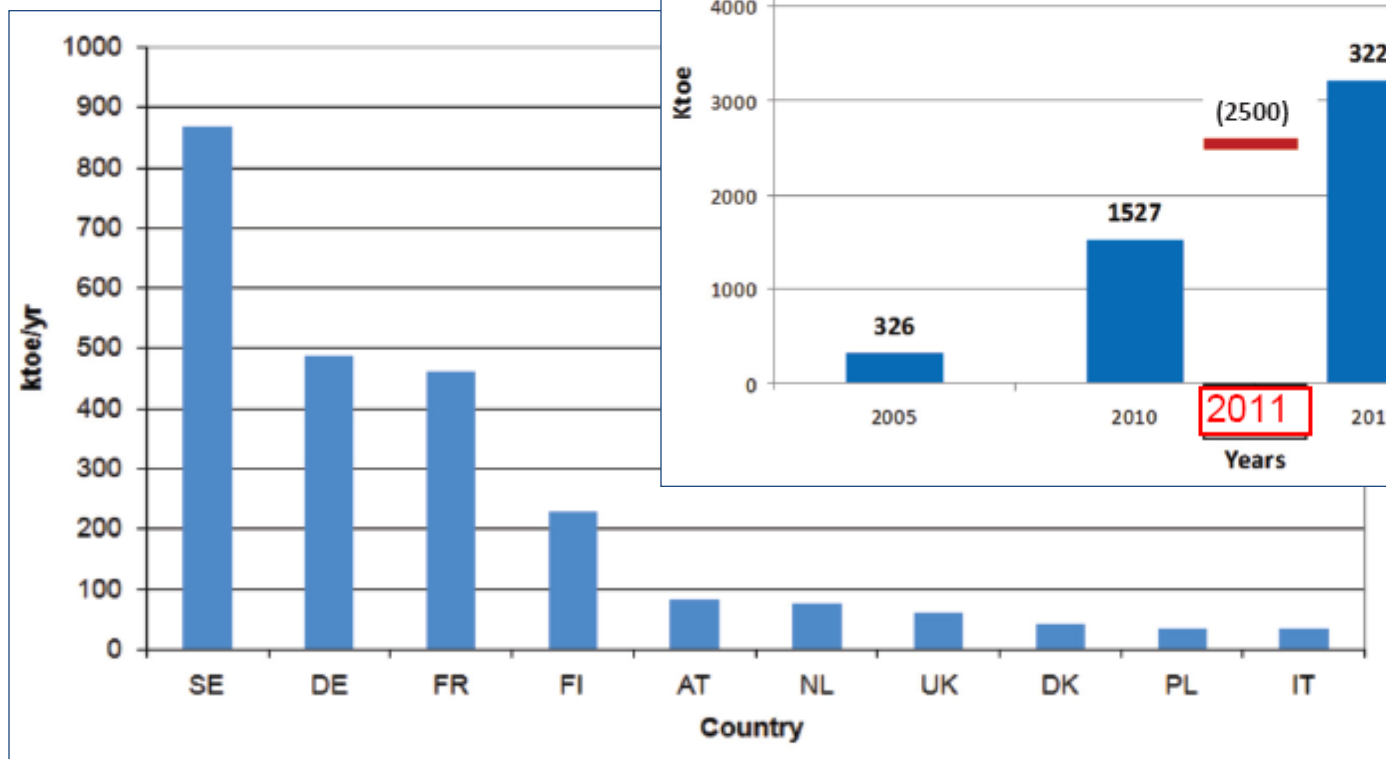


Conclusion: 3 Factors....





A glimpse at Geothermal Heat Pumps (GSHP) in Europe



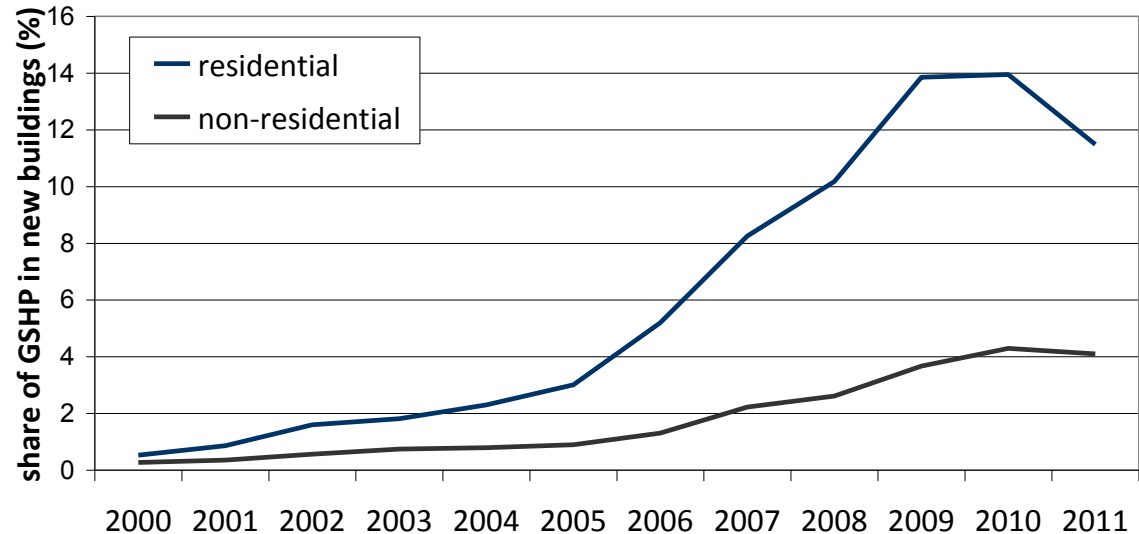
Summary of heat production from GSHP as given in the NREAPs

Heat produced by Geothermal Heat Pumps in the 10 EU-countries with the largest numbers



Hot Facts on GSHP

**share of GSHP In
new construction
in Germany**



**A great future can be expected for this sector,
with good trends for the next ten years**

Shallow geothermal is on track for reaching the targets for 2020 set forth in the NREAPs, with about 2'500 ktoe actually produced in 2011

Future markets comprise: large systems in Germany, France and UK; small and large systems for heating and cooling in the Mediterranean