



Geothermal Electricity Market in Europe

Launch of the E G E C Geothermal

Market Report 2012

@ GeoPower Europe 2012

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Summary of Key Conclusions

State of Play in 2012

- Total Installed Capacity in Europe: 1.7 GWe
- Producing 11,38 TWh of Electric Power

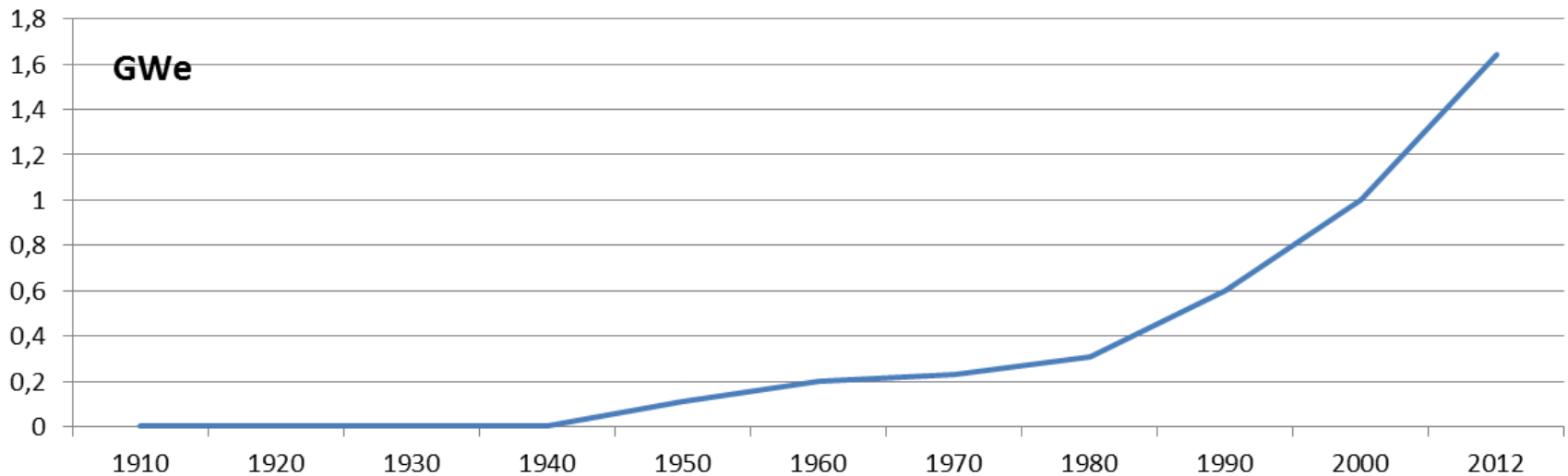
62 Geothermal Power Plants

- 48 in EU Member States
- EU Installed Capacity of 0.935 GWe



The present is neither the past nor the future !

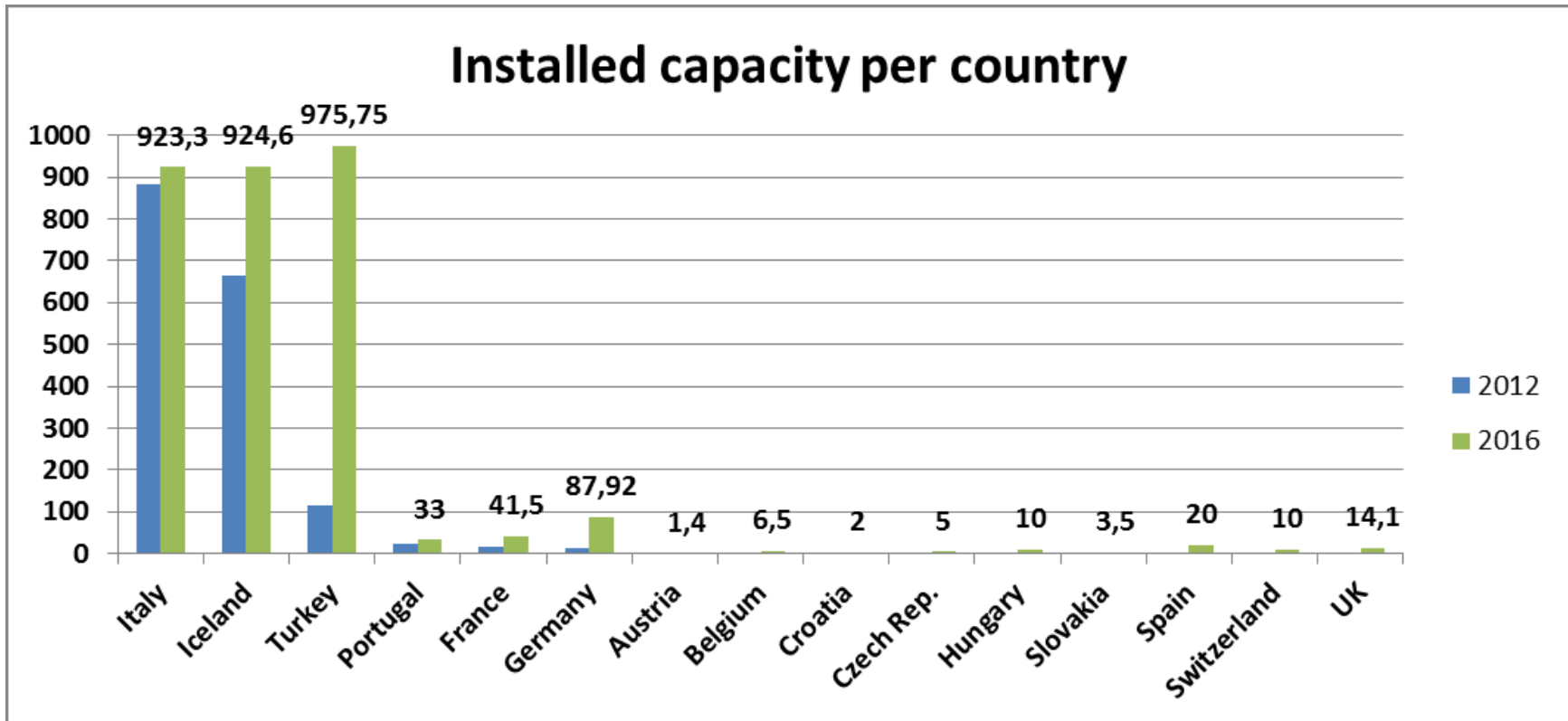
Geothermal Power - Installed capacity in Europe





Installed Capacity per Country

Looking to next 5 years...





Hot Facts

Geothermal sector has a great future: around 70 plants being developed and many project ideas (ca.100)

Turkey and Iceland are the two hottest markets in Europe

Geothermal development is also taking place in the Atlantic islands: Portugal, Spain and France

An important new entrant to the market is Germany, with 16 plants under development

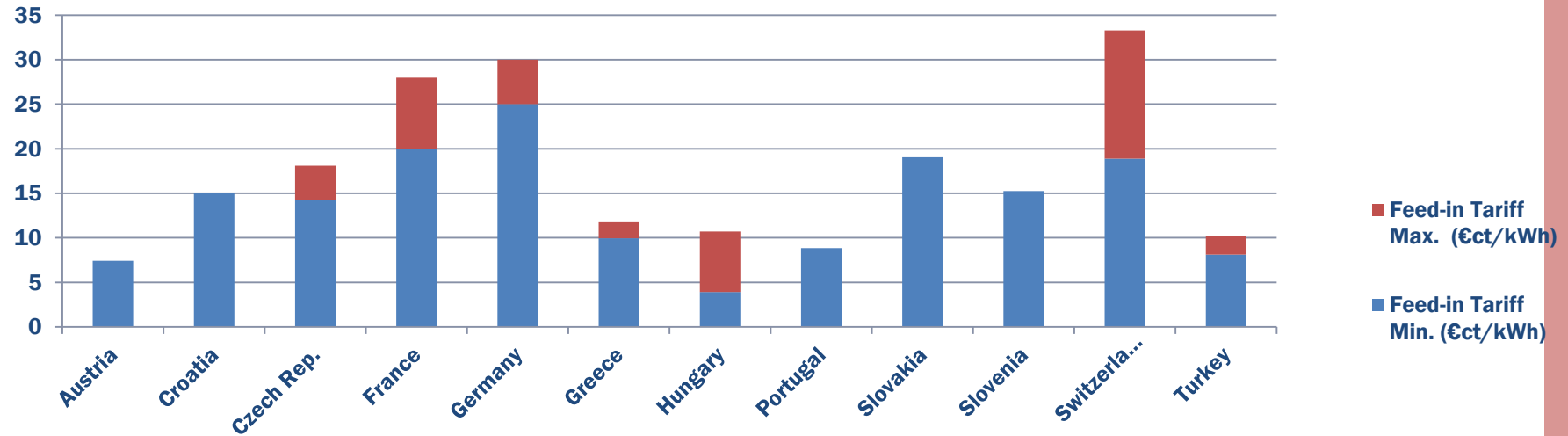
Greece seems to be the future newcomer to watch (13 project ideas)

EGS projects are being developed in Belgium, Czech Republic, France, Germany, Hungary, United Kingdom, Spain...

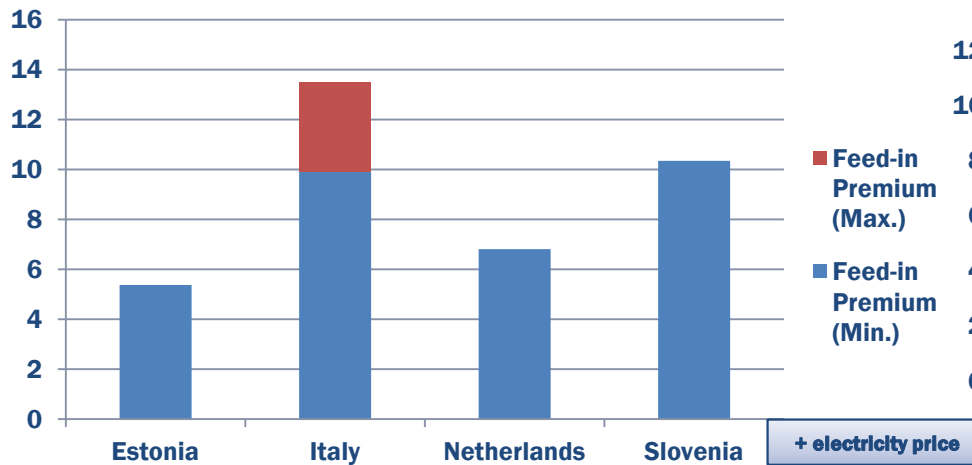


Operational support to geothermal electricity

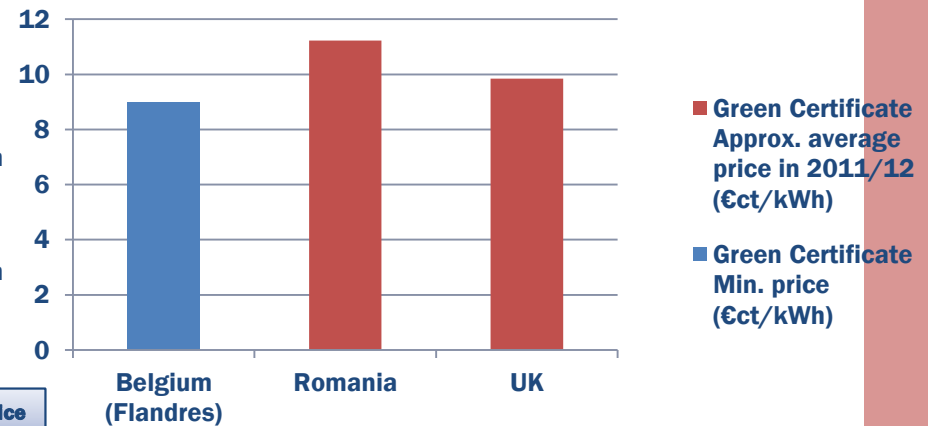
Feed-in tariff systems (€ct/kWh)



Feed-in premium systems (€ct/kWh)

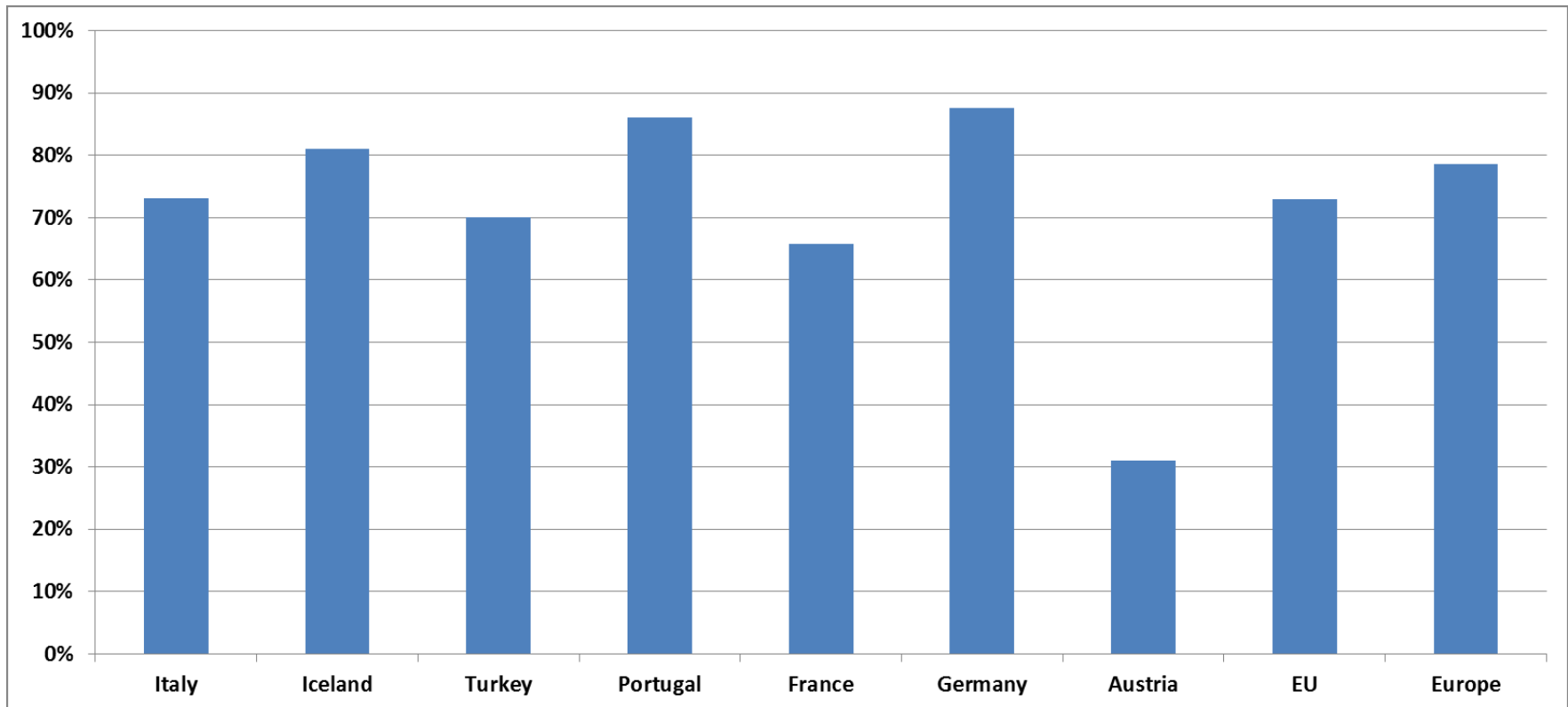


Price kWh from geothermal in Quota systems





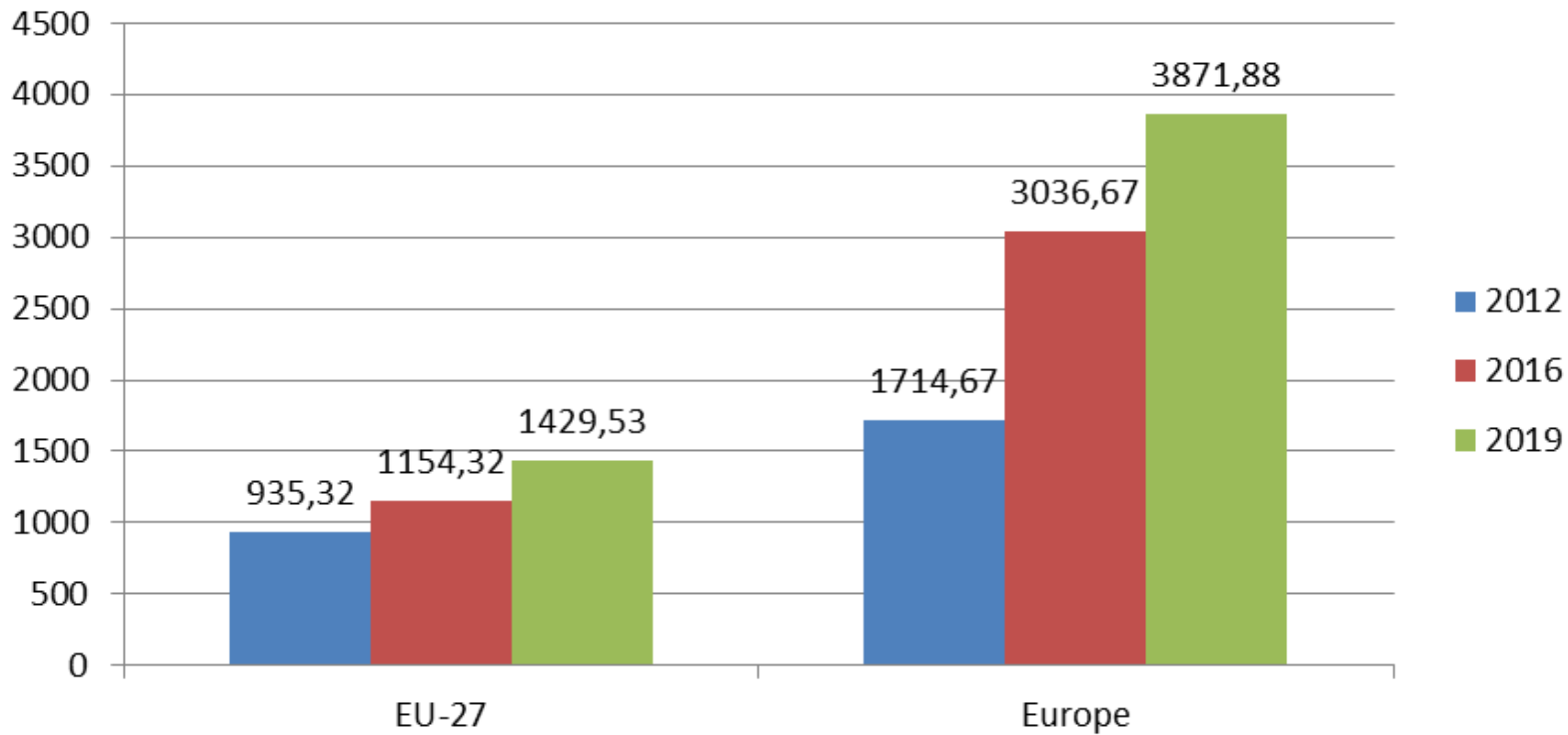
Installed Capacity Factor of Geothermal Electricity Plants in Europe





Looking to the future...

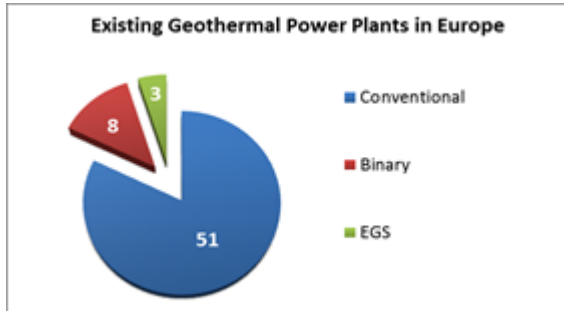
Installed capacity of geothermal electricity (MWe)



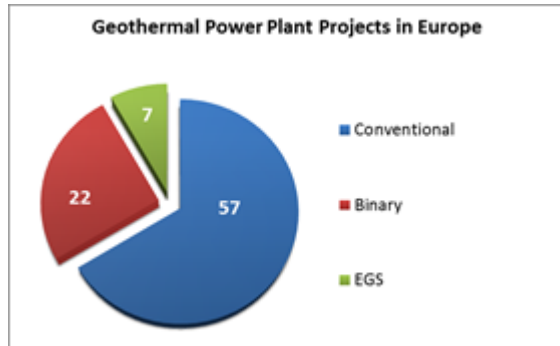
EGS in Europe...



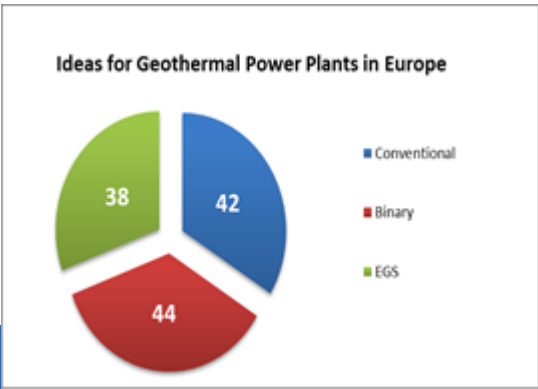
Evolution of Geothermal Power Plants in Europe



Conventional = 82%
Binary = 13%
EGS = 5%



Conventional = 66%
Binary = 26%
EGS = 8%



Conventional = 34%
Binary = 35%
EGS = 31%

Conclusion: 3 Factors....

