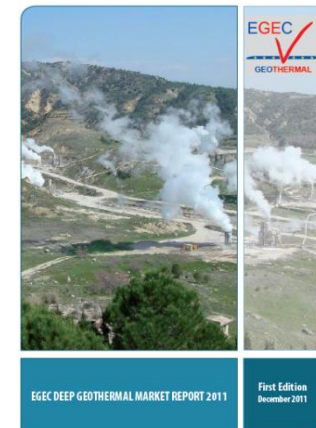




Geothermal Electricity Market in Europe

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



Jean Philippe Gibaud, Schlumberger/GeothermEX



Summary of Key Conclusions

State of Play in 2010

- Total Installed Capacity in Europe: 1.6 GWe
- Producing 10,9 TWh of Electric Power

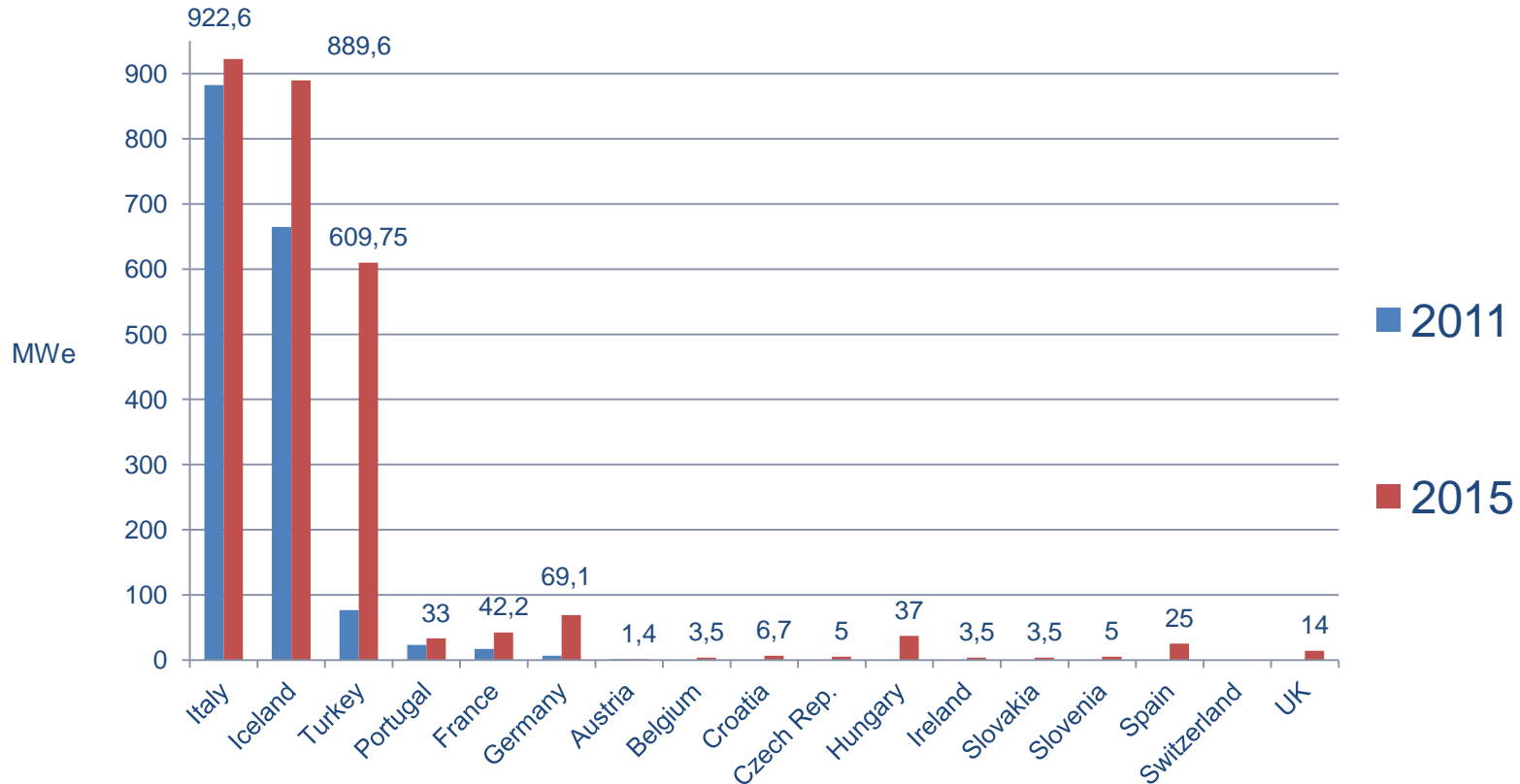
59 Geothermal Power Plants

- 47 in EU Member States
- EU Installed Capacity of 0.9 GWe



Installed Capacity per Country

Looking to next 5 years...





Hot Facts

Today, Italy dominates the market, with more than 50% of the European capacity.

Turkey and Iceland are the two hottest markets in Europe.

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

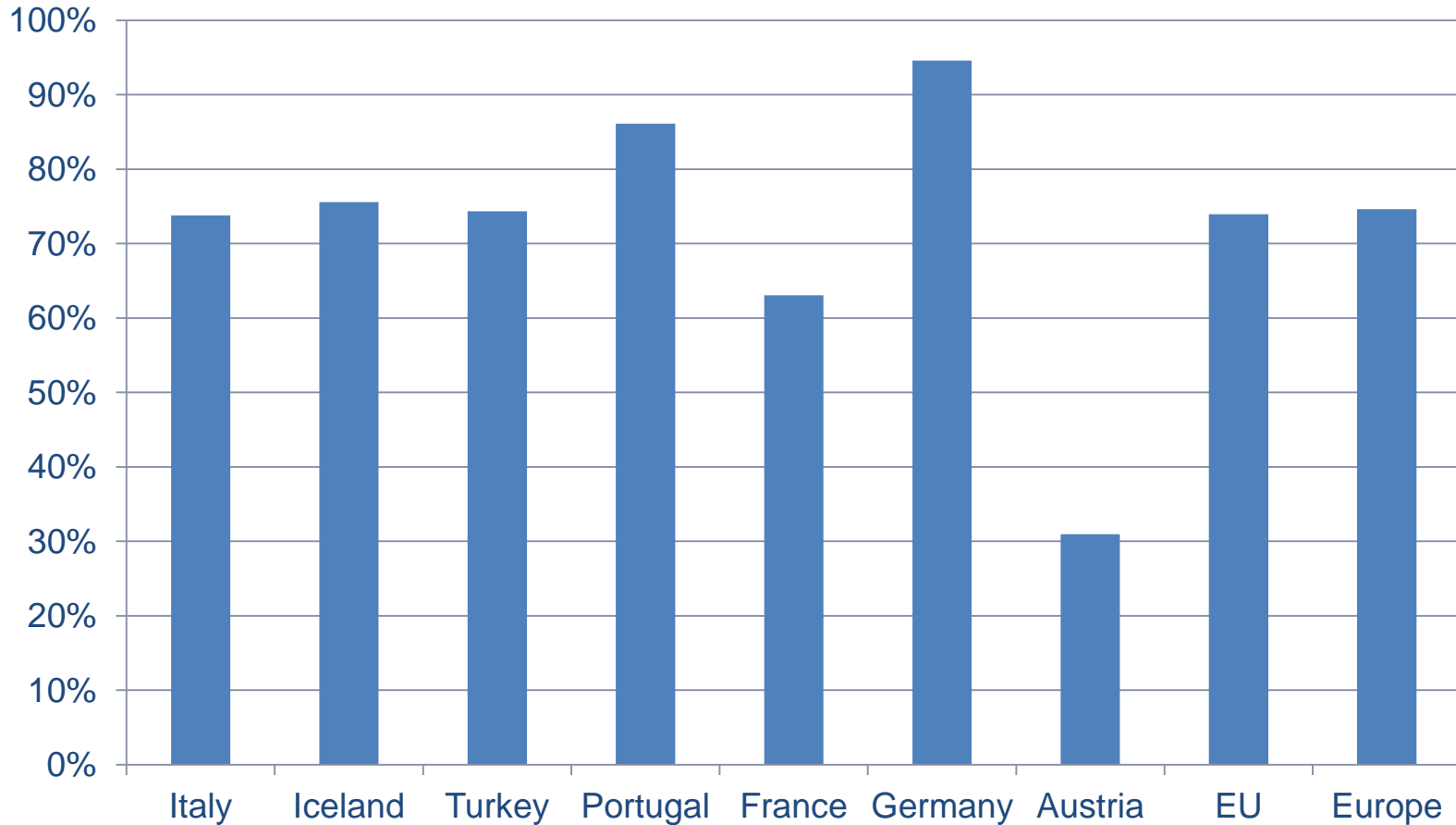
An important new entrant to the market is Germany, with 16 plants under development.

Greece seems to be the future newcomer to watch.

11 EGS projects are being developed in Croatia, France, Germany, Hungary, Ireland, United Kingdom, Slovakia, Slovenia, Spain



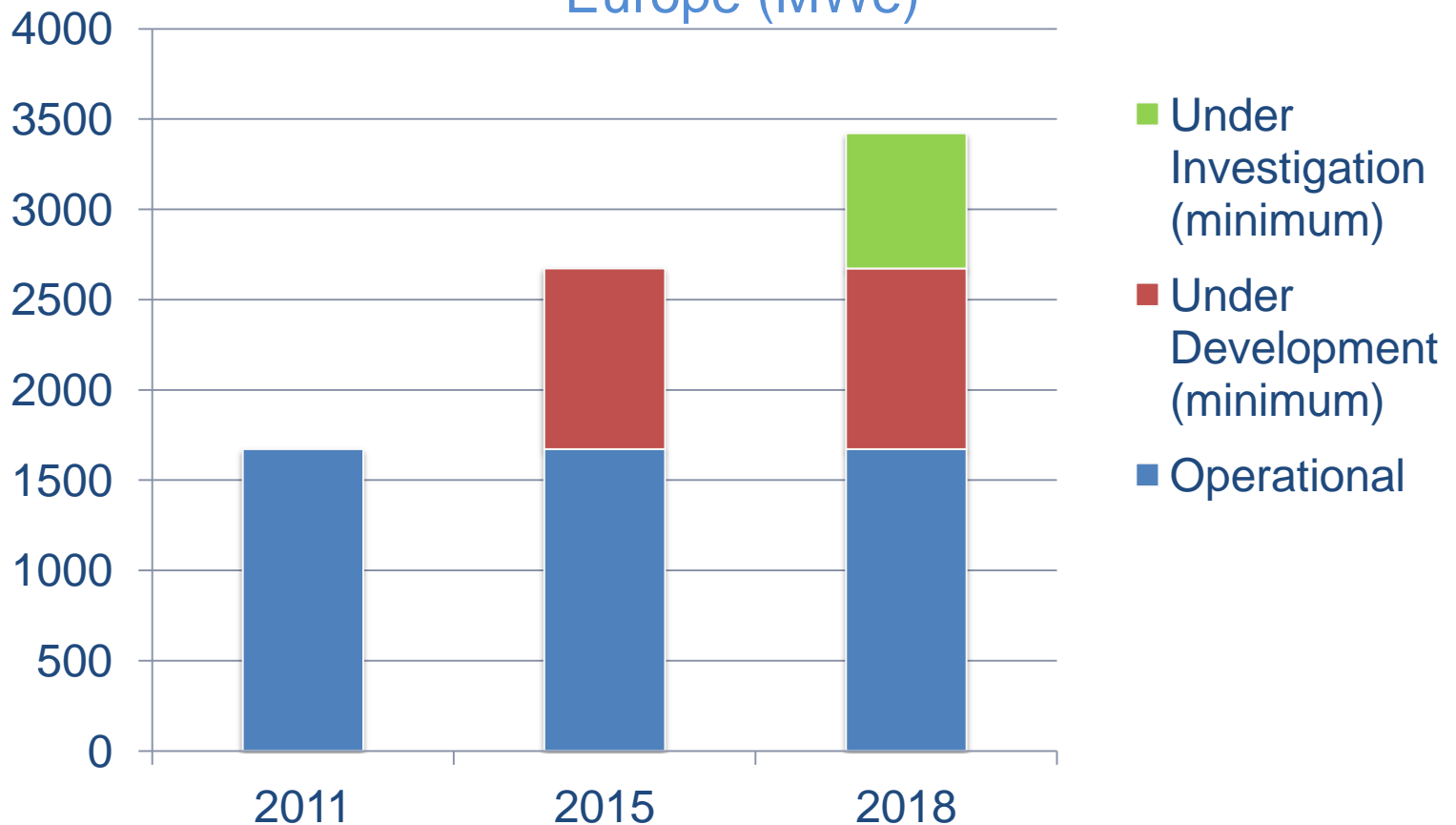
Installed Capacity Factor of Geothermal Electricity Plants in Europe





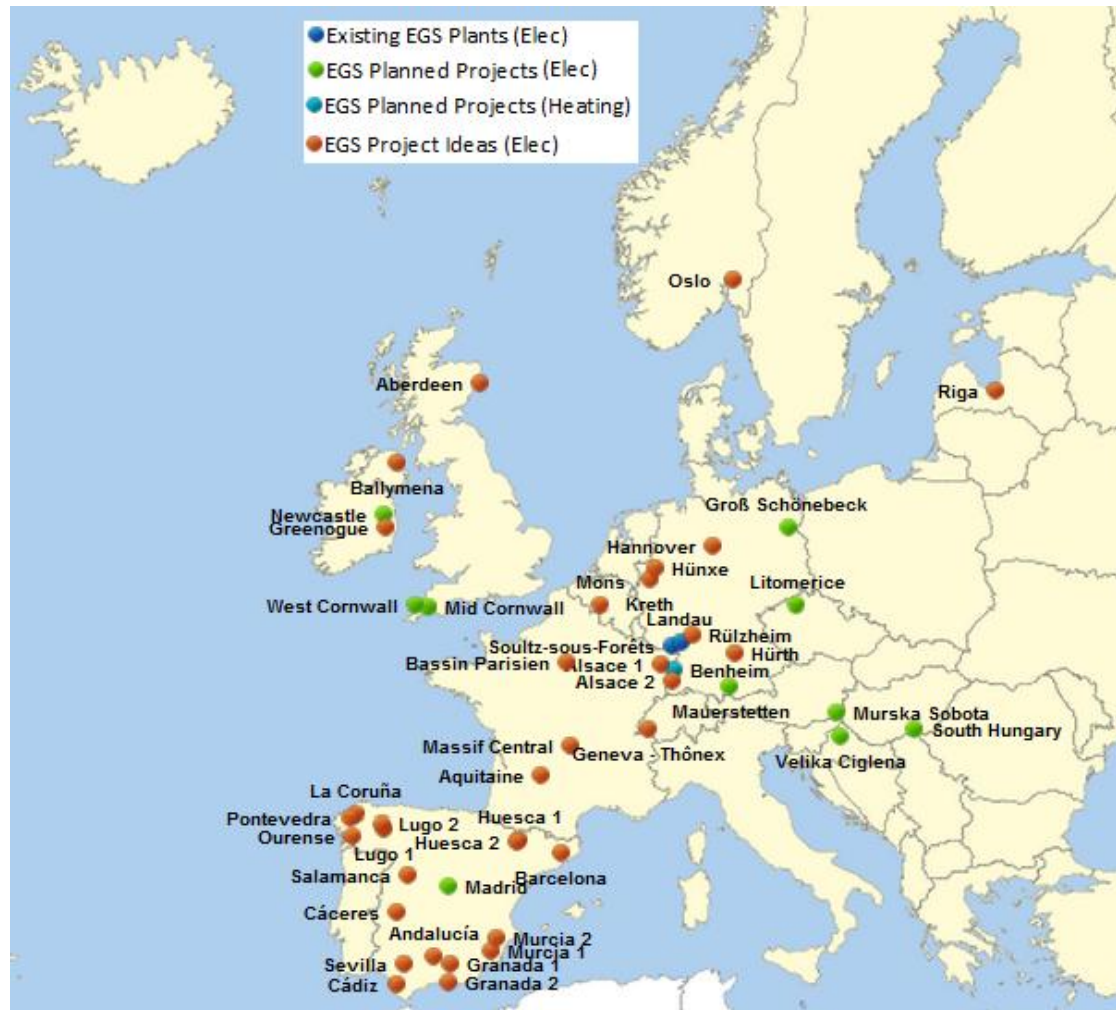
Looking to the future...

Installed Capacity of Geothermal Electricity in Europe (MWe)



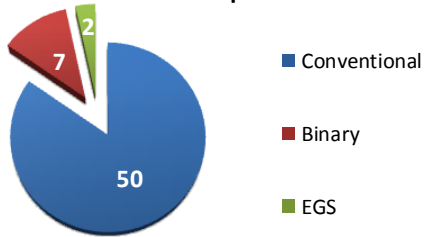


EGS in Europe...



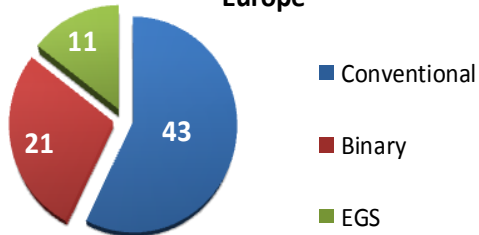
Evolution of Geothermal Power Plants in Europe

Existing Geothermal Power Plants in Europe



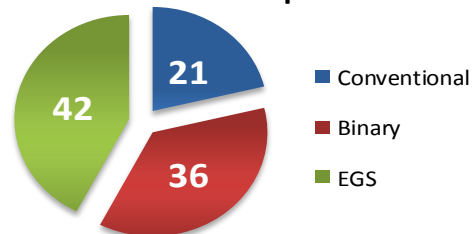
Conventional = 85%
Binary = 12%
EGS = 3%

Geothermal Power Plant Projects in Europe

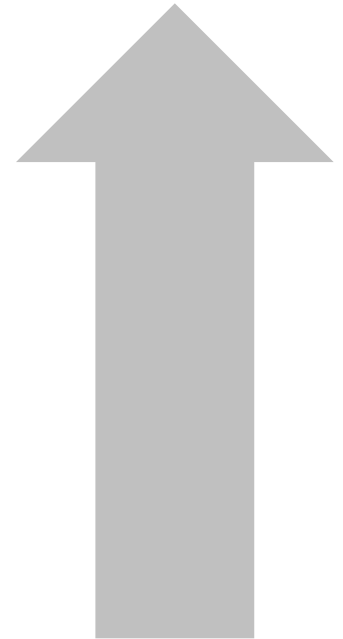


Conventional = 57%
Binary = 28%
EGS = 15%

Ideas for Geothermal Power Plants in Europe



Conventional = 21%
Binary = 36%
EGS = 43%





Conclusion: 3 Factors....

