

ENOVOS TRENDWATCH

SMART HOME
SMART LIVING
2030

6 NOVEMBER 2014

PRESS RELEASE

ON OCCASION OF

 ENOVOS
FUTURE SUMMIT 2014

SUMMARY

More information about the following issues can be found in the Management Summary starting from page 8 of the ENOVOS **TRENDWATCH** or in detail on the pages indicated below.

ARE WE ON TRACK WITH ENERGY TRANSITION?

Luxembourg, Germany, France and Belgium are stuck half way in energy transition. No country is leading the way.

Details: see ENOVOS **TRENDWATCH** Chapter A1, page 19 et seq.

WHAT IS THE ATTITUDE TOWARDS ENERGY TRANSITION?

Energy transition is necessary, but most citizens and experts are not satisfied with the measures taken so far. In 2030, energy transition will not be completed.

Details: see ENOVOS **TRENDWATCH** Chapter A3, page 28 et seq.

ARE THE TARGETS SET BY THE EU ACTUALLY REALISTIC?

The targets set for greenhouse gas emissions are out of reach for Germany and Luxembourg. Targets of energy efficiency: cautious optimism in Luxembourg.

Details: see ENOVOS **TRENDWATCH** Chapter A5.2, page 78 et seq.

BARRIERS TO ENERGY TRANSITION

"Energy policy": High importance – High dissatisfaction – Improvement only hesitant.

"Prices and costs": Unstable energy prices and production costs for alternative energies are significant barriers – Dissatisfaction with present and future prices.

"Infrastructure": No key driver for energy transition.

"Applications and use of new forms of energy": Apart from Belgium this is seen as an issue of minor importance today and in the future.

Key role for research and development (R&D).

Building contractors, politics, private households, businesses, industry and energy providers are no strong stakeholders.

Details: see ENOVOS **TRENDWATCH** Chapter A4, page 42 et seq.

ENERGY-SAVING MEASURES: IS THE END OF ENERGY GUZZLERS IN SIGHT?

Energetic modernization will become a general building trend by 2030. Reducing energy consumption and increasing energy efficiency are seen as the main reasons for implementing energy-saving measures. Savings are offset by soaring energy prices.

Details: see ENOVOS **TRENDWATCH** Chapter B1, page 86 et seq.

BARRIERS TO ENERGY-SAVING MEASURES

Public funding is needed, but is hardly used due to a lack of knowledge – Energy Performance Certificates remain largely unknown.

Independent energy consultants enjoy the highest level of trust.

Details: see ENOVOS **TRENDWATCH** Chapter B2.4, page 120 et seq.

HOW FAST WILL SMART APPLICATIONS CHANGE OUR LIFE?

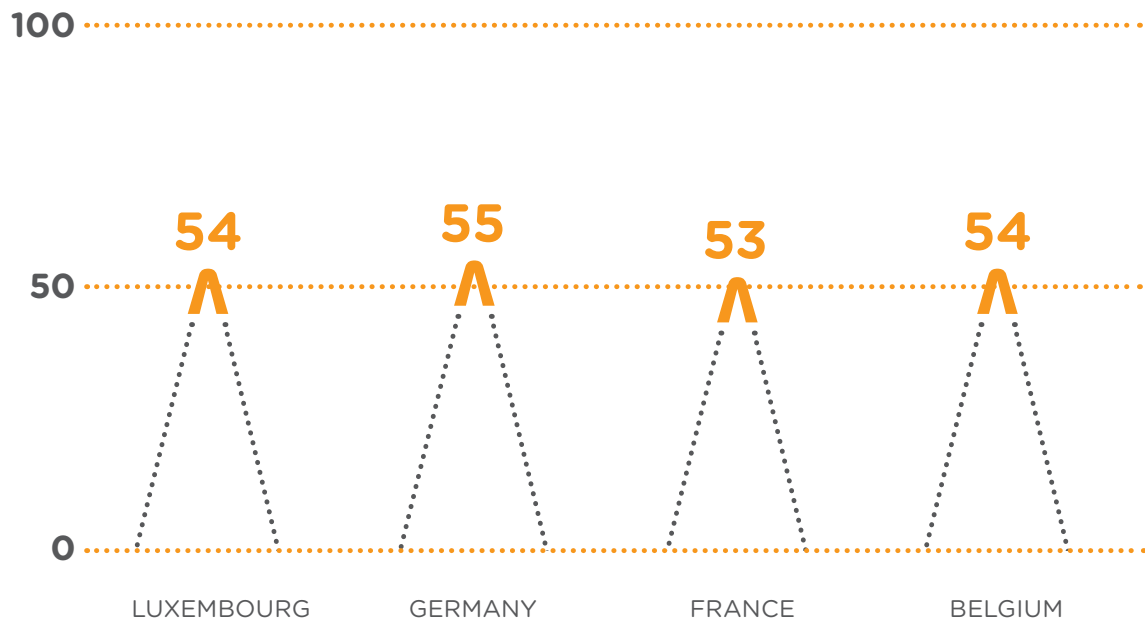
Breakthrough by 2030. More experts than citizens are convinced about their benefits.

Citizens are more concerned about security issues and increasing dependency on technology.

Details: see ENOVOS **TRENDWATCH** Chapter B2.6, page 147 et seq.

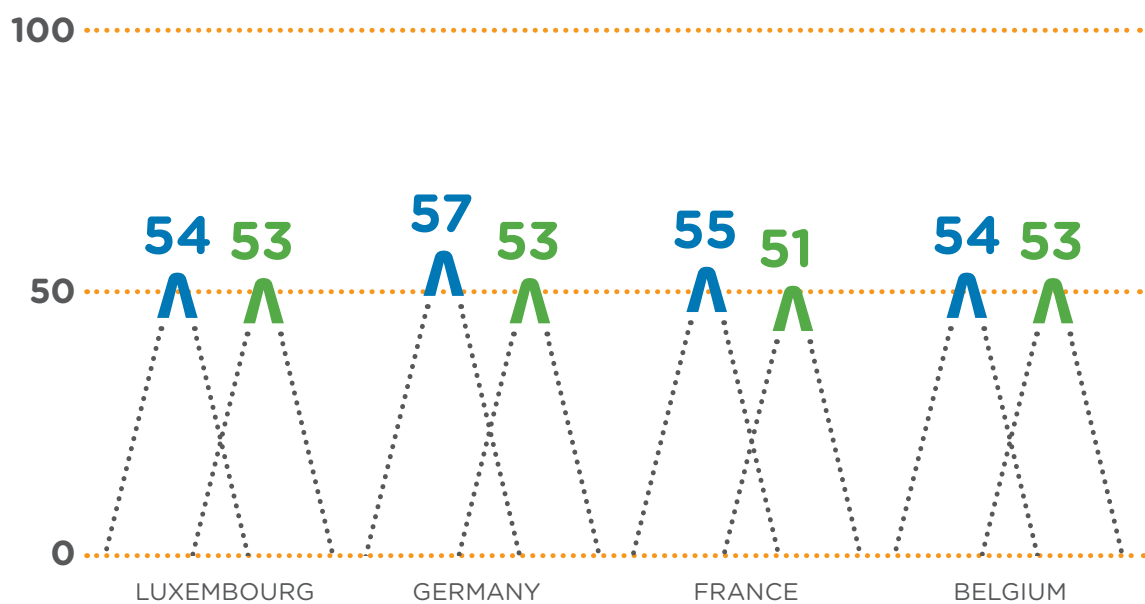
ARE WE ON TRACK WITH ENERGY TRANSITION?

ENOVOS READINESS INDEX 2014



ENOVOS READINESS INDEX 2014 IN DETAIL

IN ALL COUNTRIES, EXPERTS HAVE A MORE POSITIVE VIEW THAN CITIZENS.

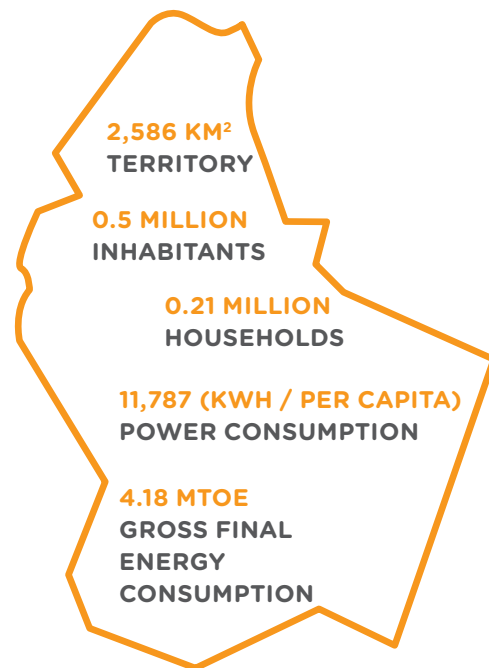


■ Experts ■ Population

LUXEMBOURG

54

of 100 points in the
ENOVOS READINESS INDEX
Ranked 2nd together with Belgium
among the four countries analysed.



90 %

of experts in Luxembourg think that
energy transition is necessary.

79 %

of citizens in Luxembourg agree that
energy transition is necessary.

54 %

of experts in Luxembourg are not satisfied
with the measures taken so far.

45 %

of citizens in Luxembourg are not satisfied
with the measures taken so far.

51 %

of experts in Luxembourg are
not sure if energy transition will
be completed by 2030.

49 %

of citizens in Luxembourg do not think
that energy supply will be dominated by
alternative sources of energy.

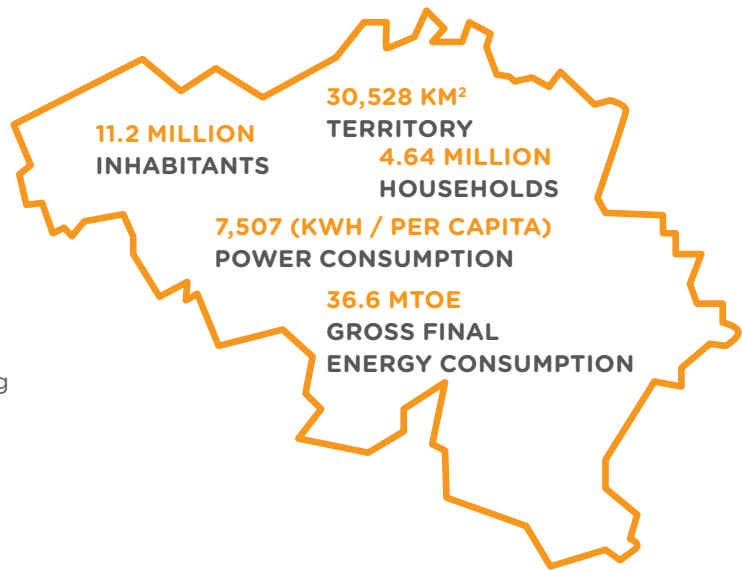
BELGIUM

54

of 100 points in the

ENOVOS READINESS INDEX

Ranked 2nd together with Luxembourg among the four countries analysed.



76 %

of experts in Belgium think that energy transition is necessary.

65 %

of citizens in Belgium agree that energy transition is necessary.

44 %

of experts in Belgium are not satisfied with the measures taken so far.

41 %

of citizens in Belgium are not satisfied with the measures taken so far.

37 %

of experts in Belgium are not sure if energy transition will be completed by 2030.

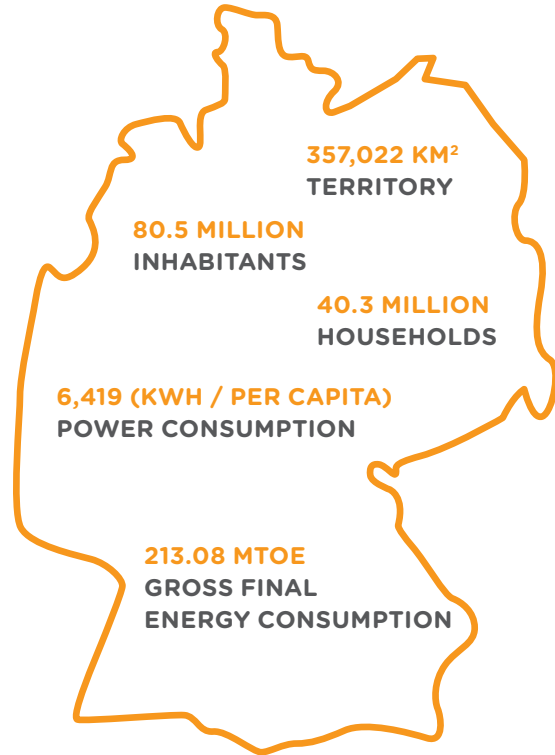
34 %

of citizens in Belgium do not think that energy supply will be dominated by alternative sources of energy.

GERMANY

55

of 100 points in the
ENOVOS READINESS INDEX
Ranked 1st together with the four
countries analysed.



75 %

of experts in Germany think that
energy transition is necessary.

74 %

of citizens in Germany agree that
energy transition is necessary.

33 %

of experts in Germany are not satisfied
with the measures taken so far.

47 %

of citizens in Germany are not satisfied
with the measures taken so far.

42 %

of experts in Germany are not
sure if energy transition will be
completed by 2030.

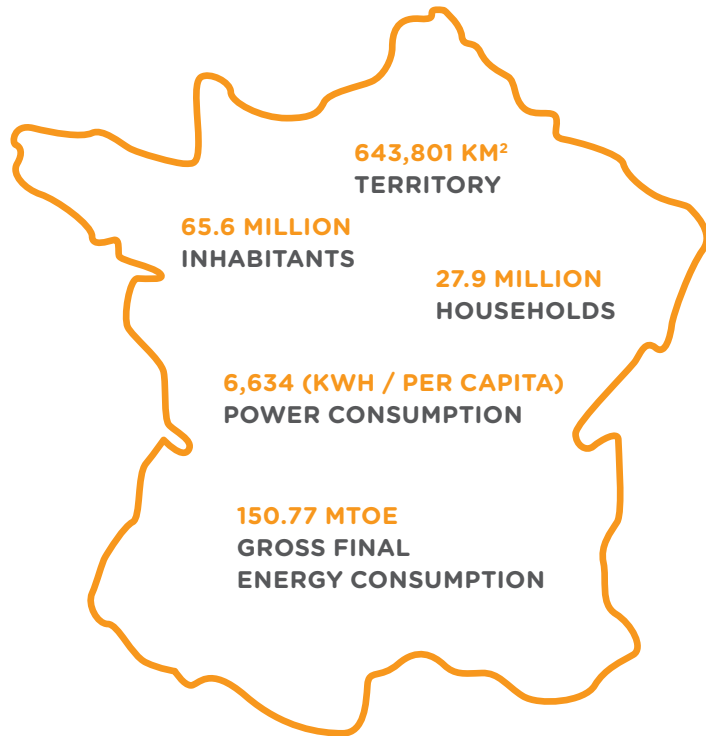
44 %

of citizens in Germany do not think
that energy supply will be dominated
by alternative sources of energy.

FRANCE

53

of 100 points in the
ENOVOS READINESS INDEX
Ranked 4th together with the four
countries analysed.



73 %

of experts in France think that
energy transition is necessary.

63 %

of citizens in France agree that
energy transition is necessary.

45 %

of experts in France are not satisfied
with the measures taken so far.

47 %

of citizens in France are not satisfied
with the measures taken so far.

40 %

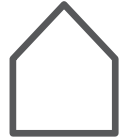
of experts in France are not
sure if energy transition will be
completed by 2030.

41 %

of citizens in France do not think that
energy supply will be dominated by
alternative sources of energy.



LUXEMBOURG



54 %

of house or apartment owners in Luxembourg have already refurbished by energy-saving measures.



80 %

of the population in Luxembourg think that public funding is necessary to drive energy-efficient modernization.



13 %

of the population in Luxembourg are well-informed about public funding options.



67 %

of experts in Luxembourg expect extreme increases in energy prices.

69 %

of the population in Luxembourg expect extremely rising energy prices.

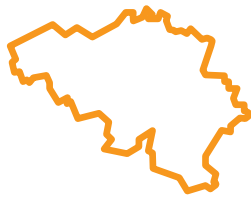


33 %

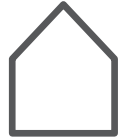
of experts in Luxembourg expect a growing demand for Smart Applications by 2030.

20 %

of the population in Luxembourg expect a growing demand for Smart Applications by 2030.



BELGIUM



57 %

of house or apartment owners in Belgium have already refurbished by energy-saving measures.



70 %

of the population in Belgium think that public funding is necessary to drive energy-efficient modernization.



18 %

of the population in Belgium are well-informed about public funding options.



74 %

of experts in Belgium expect extreme increases in energy prices.

59 %

of the population in Belgium expect extremely rising energy prices.

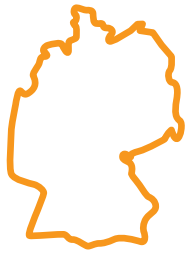


33 %

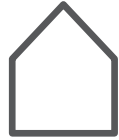
of experts in Belgium expect a growing demand for Smart Applications by 2030.

20 %

of the population in Belgium expect a growing demand for Smart Applications by 2030.



GERMANY



51 %

of house or apartment owners in Germany have already refurbished by energy-saving measures.



72 %

of the population in Germany think that public funding is necessary to drive energy-efficient modernization.



12 %

of the population in Germany are well-informed about public funding options.



70 %

of experts in Germany expect extreme increases in energy prices.

75 %

of the population in Germany expect extremely rising energy prices.

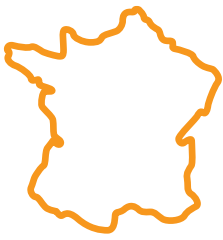


18 %

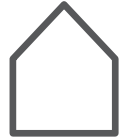
of experts in Germany expect a growing demand for Smart Applications by 2030.

12 %

of the population in Germany expect a growing demand for Smart Applications by 2030.



FRANCE



57 %

of house or apartment owners in France have already refurbished by energy-saving measures.



75 %

of the population in France think that public funding is necessary to drive energy-efficient modernization.



9 %

of the population in France are well-informed about public funding options.



69 %

of experts in France expect extreme increases in energy prices.

70 %

of the population in France expect extremely rising energy prices.



32 %

of experts in France expect a growing demand for Smart Applications by 2030.

26 %

of the population in France expect a growing demand for Smart Applications by 2030.

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