



## ENOVOS TRENDWATCH

SMART FUTURE - SMART LIVING 2020

# ENOVOS TRENDWATCH 2020 PRESS RELEASE

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## **EXPERTS CRITICAL OF SHIFT IN ENERGIES - REALISATION TAKING LONGER THAN ANTICIPATED**

**Luxembourg / Munich, 22 November 2012** - 95% of experts regard wind power as the energy form of the future. / Development of renewable energies in accordance with EU specifications to 2020 only on track in Germany / 54% of experts regard comprehensive cover by smart grids as possible while 75% anticipate smart meters. / Two-thirds are of the opinion that 10% of turnover by energy suppliers will be achieved with smart building consulting services by 2030. / Practically all experts regard electric vehicles as being too expensive to enable them to assert themselves comprehensively. / 62% are of the opinion that private end consumers are paying for the shift in energies.

These are the most important results of the ENOVOS TRENDWATCH Future Study presented by TNS today at the ENOVOS FUTURE SUMMIT. 375 top experts representing the energy sector, key electricity-intensive industries, professional associations and politics collaborated on the study in Luxembourg, Germany, France and Belgium.

### **THE FUTURE LIES IN WIND POWER**

Experts in each of the countries agree on how they would like to design the energy landscape in 20 years' time. 95% of experts favour developing wind power, 81% are for geothermal energy and 76% for photovoltaic while 70% are for hydropower and biomass and/or biogas. Nevertheless, 42% are in favour of developing natural gas.

### **EXPERTS DISAGREE ON WITHDRAWAL FROM THE NUCLEAR ENERGY PROGRAMME**

83% want to reduce dependence on mineral oil, 76% would like to turn their back on coal and 71% favour withdrawing from the nuclear energy programme within the next 20 years. But 64% of French experts are of the opinion that full withdrawal from nuclear energy will "probably never" be achieved. Nevertheless, a third of French experts still think it's possible that this will happen by 2030.

### **EU TARGETS FOR RENEWABLE ENERGIES ARE TOO AMBITIOUS**

With the exception of the German experts, there is a consensus among all of the countries: the targets specified by the European Union regarding the proportion of energy supplies to be accounted for by renewable energies can not be achieved by 2020. 61% of French experts, 67% of Luxembourg experts and 42% of Belgium experts opine that their country-specific targets are too high. On the other hand, 82% of German experts believe that the share can be increased to 18% by 2020.

83% of all experts indicate the most important reason for non-attainment of the targets specified by the European Union as the fact that the measures introduced by their respective governments for a shift in energies are insufficient. "The shift in energies can not therefore be taken for granted", is how Dr. Sabine Graumann, TNS Infratest, sums up the results of the study.

### **DEVELOPMENT OF SMART GRIDS IS SLOW BUT CONSTANT - SMART METERS WILL ONLY ASSERT THEMSELVES WHERE THE OLD METERS ARE REPLACED FREE OF CHARGE**

The development of smart grids is only proceeding at a slow pace. Just over half of experts anticipate comprehensive availability of smart grids by 2030 while 33% do not envisage this until after 2030.

Three-quarters of experts are of the opinion that private households will avail of smart meters by 2030 while 18% anticipate that this will only be the case in the distant future. 86% of German and French experts but only 78% of Luxembourg experts and 65% of Belgian experts believe that smart meters will only assert themselves in private households if the old meters are replaced free of charge.

### **PRIVATE END CONSUMERS WILL PAY - WHETHER THEY WANT TO OR NOT**

62% of those surveyed are convinced that the private end consumer and not major industrial customers and companies will be obliged to pay for the shift in energies. In Germany, this opinion is in fact held by three-quarter of the experts. Only 27% of those experts surveyed believe that the end consumer is willing to pay significantly higher prices for documented “green products” and energy services.

### **SMART HOME AND SMART BUILDING: NEW BUSINESS AREAS FOR ENERGY SUPPLIERS**

Both in the case of purpose-built buildings such as office complexes and private residential buildings, smart building and living solutions will successively establish themselves. Two-thirds of those experts surveyed anticipate that by 2030 smart building service packages will account for as much as 10% of turnover by energy suppliers.

### **THE BREAKTHROUGH BY ELECTRO-MOBILITY IS SLOW IN COMING**

There's no real progress in the countries as regards penetration of the market by electric vehicles. None of the Belgian experts believes that one million electric vehicles will be registered by 2020. Nevertheless, 44% of the French experts are of the opinion that by then there will be as many as two million electric cars on the roads in France. 70% of the experts in all countries indicate that a competitive market price for electric vehicles is an essential driver for electro-mobility. 56% of experts regard a comprehensive charging station infrastructure as the most important driver ahead of uniform international standards and norms (46%).

### **ENOVOS TRENDWATCH FUTURE STUDY: SMART FUTURE - SMART LIVING 2020**

Within the framework of the ENOVOS TRENDWATCH Future Study and in collaboration with TNS Ilres, Luxembourg, TNS Infratest Business Intelligence, the TNS Group specialist in global market analyses, examined how far we have come en route to sustainable energy supplies in Luxembourg, Germany, France and Belgium. The study analyses the penetration speed of smart grids and meters, smart building solutions for private and purpose-built structures as well as electric vehicles, whereby the focus is on assessing innovative products and services until 2030 and beyond. The report analyses the drivers that will accelerate the shift in energies or the restraints and location-specific peculiarities that will characterise the future of energy supply.

# ENOVOS FUTURE SUMMIT

In September/October 2012, a survey was conducted among 375 female and male experts representing the energy sector, the information and telecommunications industry, key electricity-consuming industries such as automotive, chemicals or engineering, research and development, the relevant professional associations and government agencies, ministries or political organisations. The survey was conducted online and by phone in German, French and English.

The initial results of the survey were presented at the ENOVOS **FUTURE SUMMIT** on **22 November 2012**. The presentation papers can be downloaded from [www.enovos-future-summit.eu](http://www.enovos-future-summit.eu) as of **23 November 2012**. The full “**ENOVOS TRENDWATCH 2020**” report can be downloaded free of charge from this Website as of **2 February 2013**.



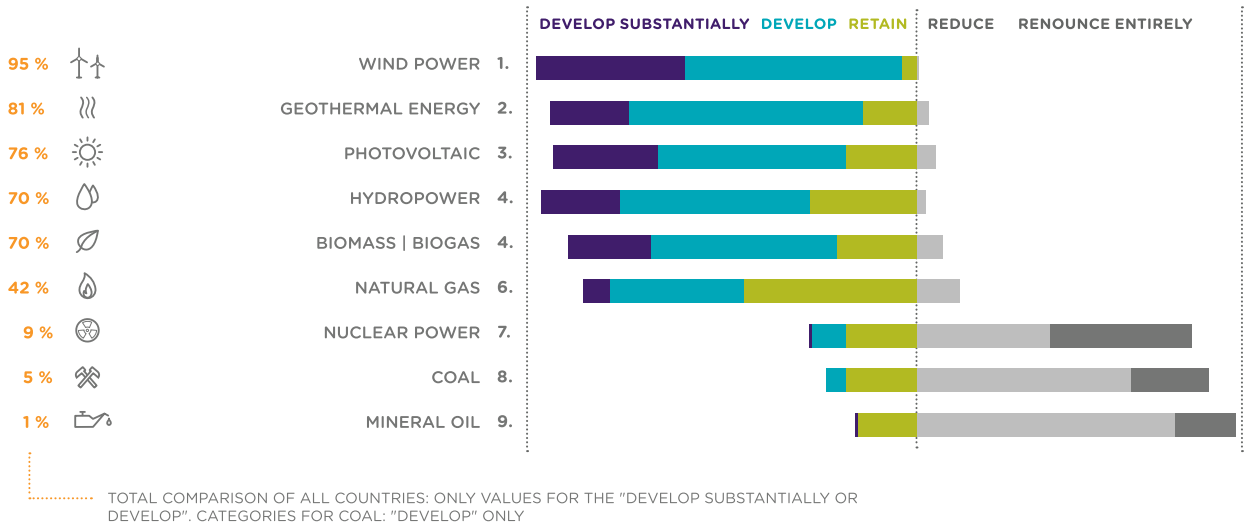
**Contact and further information:**

See cover sheet

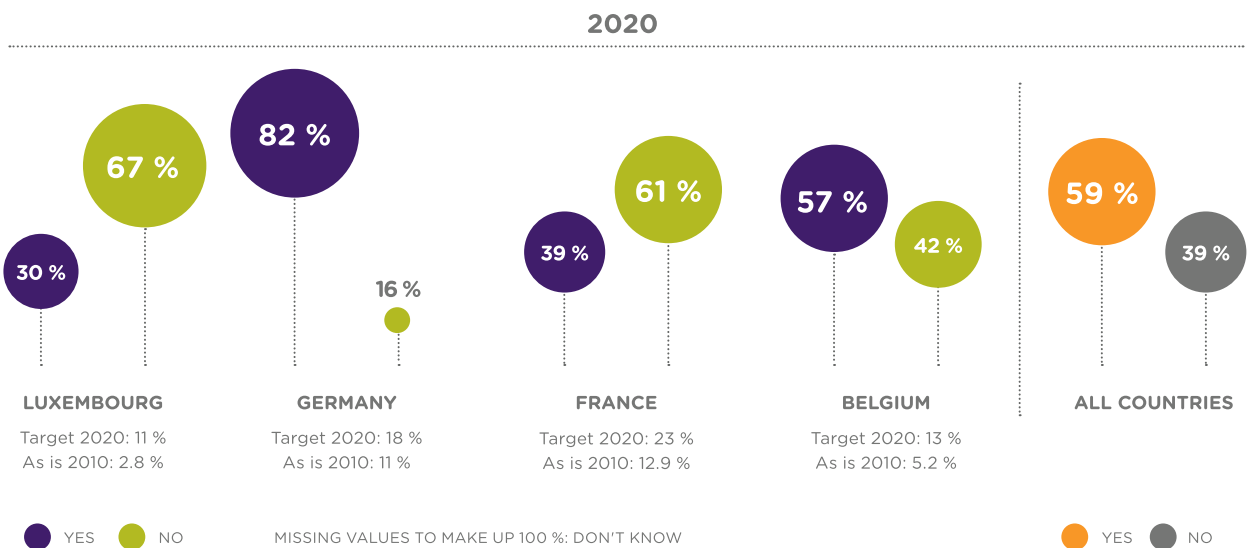
**Annex:**

Graphics from the presentation

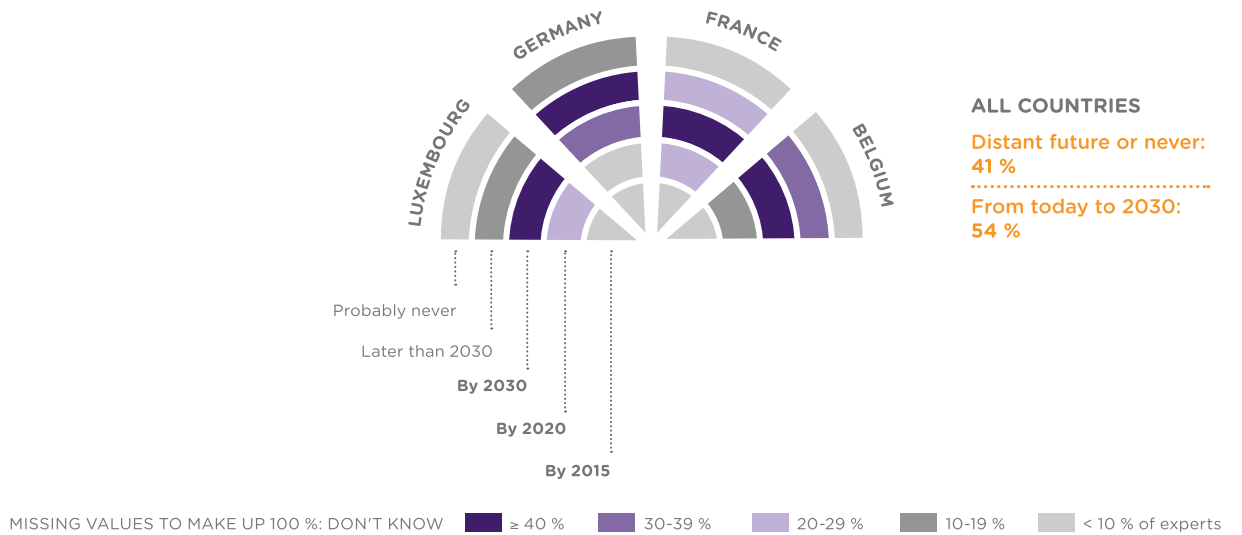
## WHAT TYPES OF ENERGY SHOULD BE DEVELOPED OR REDUCED IN THE NEXT 20 YEARS?



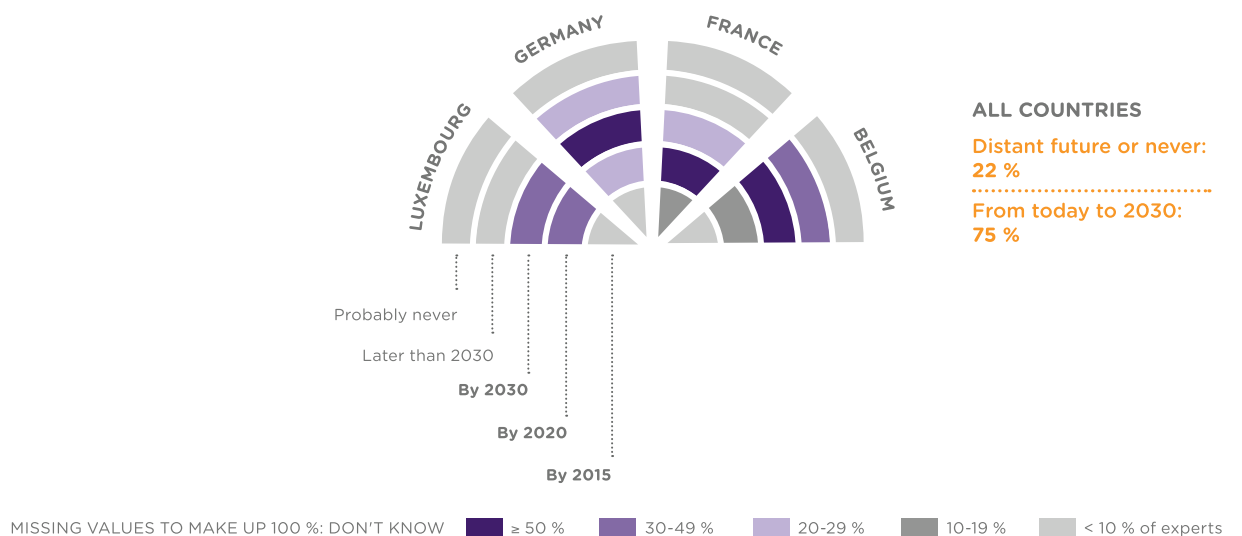
## WILL THE TARGETS SPECIFIED BY THE EU FOR INCREASING THE SHARE OF RENEWABLE ENERGIES BE REACHED?



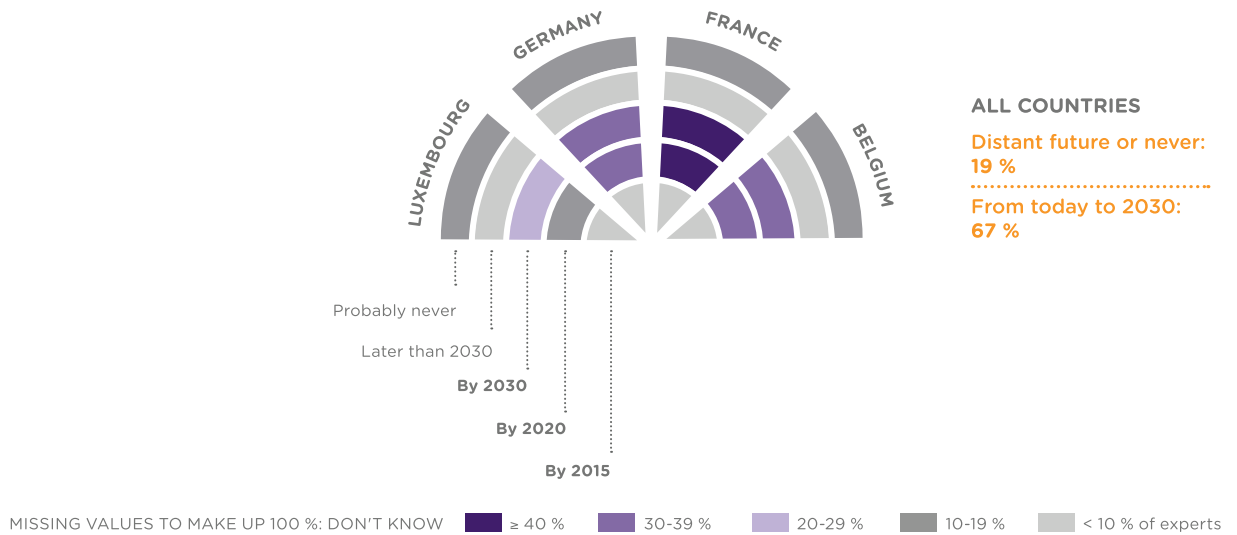
## BY WHEN WILL THE COUNTRIES BE FULLY EQUIPPED WITH SMART GRIDS?



## BY WHEN WILL SMART METERS BE USED IN MORE THAN 90% OF PRIVATE HOUSEHOLDS?



## BY WHEN WILL ENERGY SUPPLIERS ACHIEVE AT LEAST 10% OF THEIR TURNOVER WITH SMART BUILDING SERVICE PACKAGES?



## WILL THE TARGETS SPECIFIED BY GOVERNMENTS CONCERNING THE NUMBER OF ELECTRIC VEHICLES BE REACHED IN 2020?

