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# INSIGHTS FROM THE INVENTORY OF SMART GRID PROJECTS IN EUROPE

## 2012 UPDATE

By Gianluca Fulli, Catalin Covrig and Miguel Olariaga

The electricity sector is continuously evolving to meet new policy goals and to satisfy the increasing energy demand while integrating more environmentally aware energy resources. Renewable energy sources, demand response, energy savings, security of supply, consumer involvement and advanced services are all part of today's EU agenda in the sector. Smart grids, or intelligent electricity networks, are at the core of this revolution, playing a key role in shaping those changes.

By the end of 2010 the Joint Research Centre, the European Commission's in-house science service, launched the first comprehensive inventory of smart grid projects in Europe<sup>1</sup>. The final catalogue was published in July 2011 and included 219 smart grid and smart metering projects from the EU-28 member states, Switzerland and Norway. The participation of the project coordinators and the reception of the report by the smart grid community were extremely positive. A close insight from this report was published in *Metering International* in 2011 (Issue 3 2011, p. 80).

Due to its success, the European Commission decided that the project inventory would be carried out on a regular basis so as to constantly update the picture of smart grid developments in Europe and keep track of lessons learnt and of challenges and opportunities. For this, a new on-line questionnaire was launched in March 2012 and information on projects collected up to September 2012. At the same time an extensive search of project information on the internet and through cooperation links with other European research organizations was conducted. The resulting final database is the most up to date and comprehensive inventory of smart grids and smart metering projects in Europe, including a total of 281 smart grid projects and 90 smart metering pilot projects and rollouts from the same 30 countries that were included in the 2011 inventory database. Projects surveyed were classified into three categories: R&D, demonstration (or pre-deployment) and deployment, and for the first time a distinction between smart grid and smart metering projects was made. The following is an insight into the 2012 report<sup>2</sup>.

### KEY MESSAGES

The analysis of the newly gathered data for the 2012 report has unveiled important key aspects that have been compared and correlated to the ones drawn from the 2011 analysis.

### PROJECT INVESTMENTS AND SCALE

The 281 smart grid projects account for a total investment of €1.8 billion. The average project duration is 35 months. Over 50% of the projects surveyed were started after 2010.

The level of investments committed in 2011 was remarkable mainly due to some large publicly funded projects, in particular the first batch funded by the ambitious Low Carbon Network Fund

(LCNF) in UK for a total of €120 million and a number of large scale demonstrators financed under FP7 or with European regional funding. The fact that the number and level of investments of the projects started in 2012 are well below that doesn't necessarily indicate a negative tendency but might only reflect the fact that the survey was closed by September 2012.

As important as the budget allocation is the size of the project. Smaller projects indicate more research and market exploratory work while larger projects might imply rollout or development of more consolidated and mature applications. Projects have been categorized into five different groups: 'very small scale' for projects under €2.5 million, 'small scale' for projects between €2.5 million and €7.5 million, 'medium scale' between €7.5 million and €20 million, 'large scale' between €20 million and €30 million, and 'very large scale' for projects over €30 million. Analyzing the available data from 2006, two tendencies can be noted: the 'small scale' cluster is increasing at the expense of the 'very small scale' cluster and the 'medium scale' cluster is shrinking in favour of the 'large' and 'very large scale' ones. In general, the size of projects is increasing, showing positive signs in terms of the scalability and maturity of related smart grid applications.

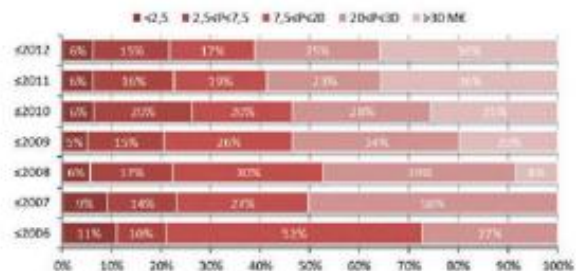


Figure 1 – Share of projects in each budget range across the years in terms of budget allocated.

### GEOGRAPHICAL DISTRIBUTION

70% of all projects are in only seven countries: Austria, Denmark, France, Germany, Italy, Spain and UK. Eastern European countries are significantly lagging behind.

In terms of spending, UK leads with 15% of the total, Germany and France around 12% each and Italy, Denmark and Spain around 10% each. The public sector has played a major role in starting new projects, especially in France through the Smart Grid program of the Agency for Environment and Energy Management (ADEME) and in Italy through the regulatory authority AEEG. Denmark is the leading country in R&D projects and also the country that invests most both per capita (over €30 per person) and per kWh (€0.5 per MWh) of consumed electricity.

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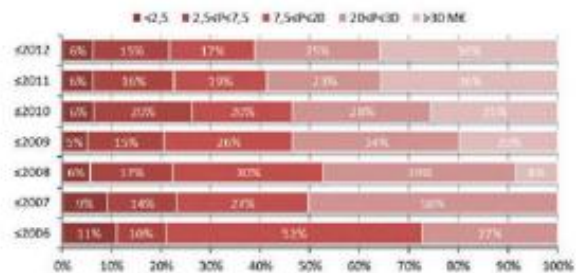


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