



Elia's survey of 1,000 respondents reveals that 68% are ready to use electricity in a flexible manner if doing so will lower their energy bills

MAIN CONCLUSIONS OF THE SURVEY

- The survey's results demonstrate a clear rejection of fossil fuels and a preference for low-carbon energy generation.
- Respondents reported a willingness to spread out their use of electricity across time, provided that doing so means their bills are lowered.
- There is a discernible dichotomy between respondents' high expectations regarding their electricity supply and their willingness to pay for it.
- People generally think that electricity is the energy source of the future but also that the current power grid is not (yet) ready for an increase in electricity use.
- Answers show that respondents are more aware of the topic of energy independence and their own consumption habits due to the current geopolitical context.
- There is a need to raise awareness about the energy sector: knowledge about it is limited while the impact of the energy transition on everyday life is underestimated.

BRUSSELS | Belgian electricity transmission system operator Elia Transmission Belgium (ETB) has published the findings of a survey which was carried out to identify the knowledge, attitudes and behaviours held by Belgian residents regarding the use of electricity, the energy transition and the power grid. The main issues highlighted in the survey's findings are consistent with the main topics of the memorandum ETB drafted for policymakers. In particular, the survey's findings demonstrate the need for Belgium's future energy policy to be decided on today. Accessing carbon-free energy and competitive prices by deploying the appropriate infrastructure in good time was also highlighted by respondents, as were the need for flexibility and making it attractive to consumers. Finally, the survey revealed that technological development and respect for data privacy are important topics for consumers.

The survey, which was carried out by independent research firm Indiville between 14 and 26 February 2024, gathered responses from 1,057 Belgian residents over the age of 18 (with an estimated margin of error of 3.01%). It probed their knowledge about, attitudes towards and behaviours regarding the use of electricity, the energy transition and the Belgian electricity grid. It also assessed the extent to which respondents are aware of the challenges involved in ensuring a stable electricity supply in Belgium.

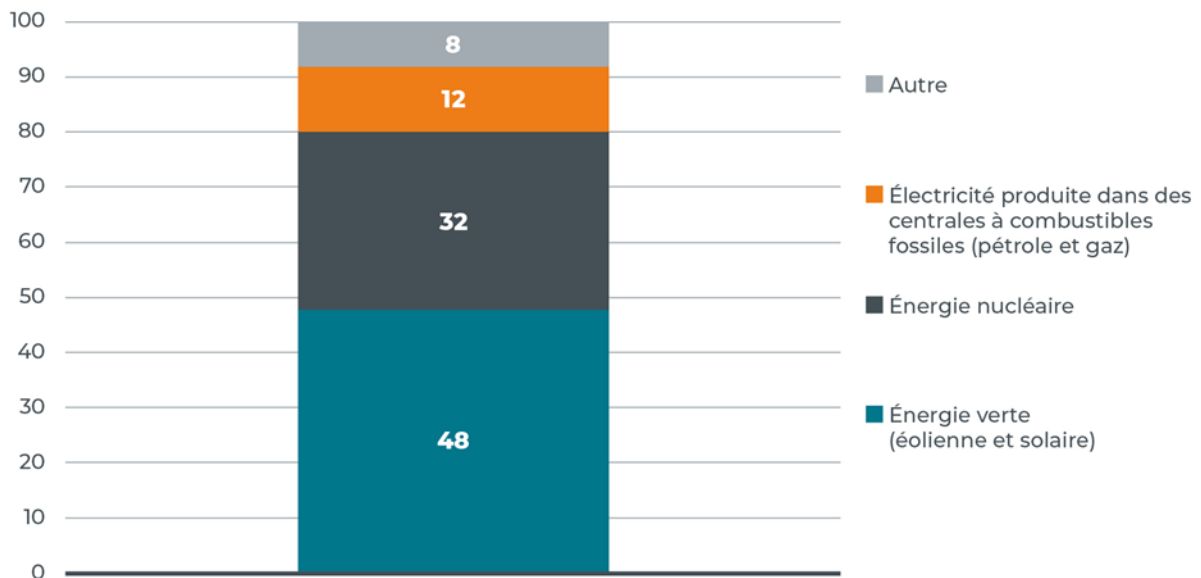
SURVEY RESULTS

Respondents identified the area of 'social security and health care' (42%) as the most important topic that requires action. This was closely followed by 'energy (the energy transition), climate and the environment' (32%), 'education' (31%), 'fighting crime' (30%) and 'fighting poverty' (30%).

71% of respondents believe that in the future we must focus as much as possible on low carbon energy generation

Respondents clearly want to reduce Belgium's dependence on fossil fuels. Regarding the country's future energy mix, respondents think the country should mainly invest in green energy (48%) and nuclear energy (32%).

GRAPHIC: In the years to come, what generation sources should Belgium invest in? Distribute 100 points among the following sources.

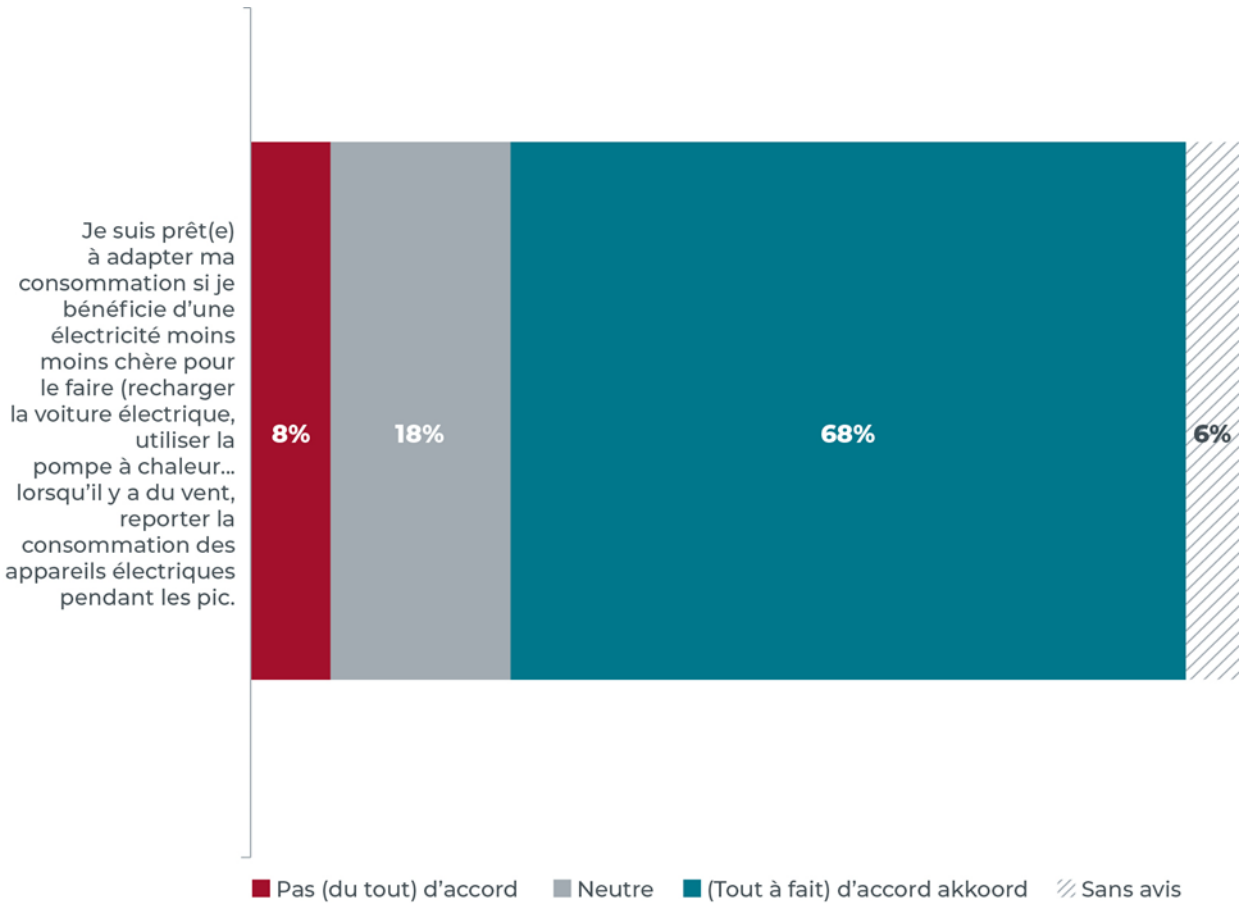


68% of respondents support flexible consumption if it can be made attractive

A large proportion of respondents (68%) reported that they are prepared to spread out their electricity consumption in time if doing so will reduce the cost of electricity. Six out of ten solar panel owners (61%), or 35% of the individuals surveyed, often (42%) or always (19%) adjust their electricity consumption in line with the availability of electricity generated by their solar panels.

In Flanders, this mainly relates to owners who understand the impact of the capacity tariff on their electricity bills.

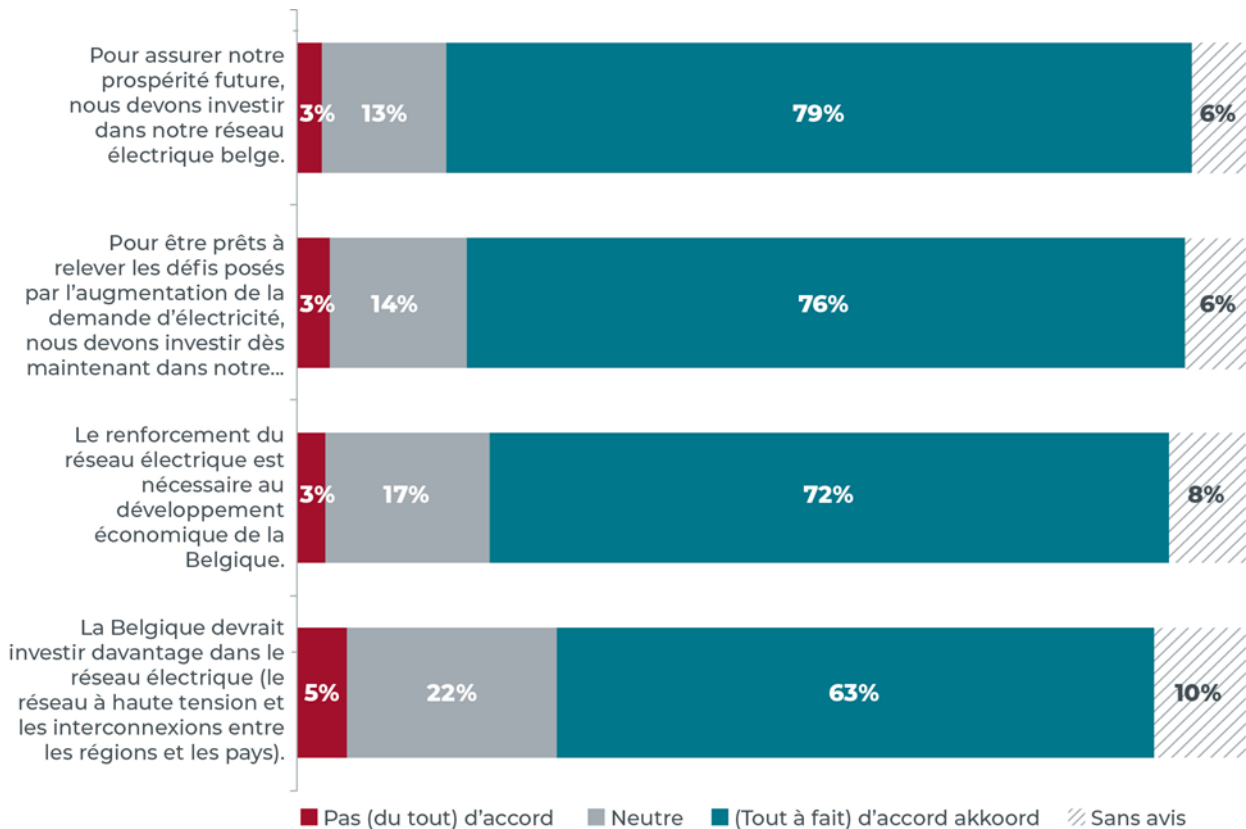
GRAPHIC: To what extent do you agree or disagree with each of the following statements?



56% of Belgian residents are convinced that their electricity bills will increase if we do not invest in the energy transition

A majority of respondents communicated that they feel it is necessary to invest more in the power grid in order to ensure the country's future prosperity (79%), to be prepared for increased electrification (76%), and for the country's economic development (72%). Respondents reported that they generally think (48%) that electricity is the energy source of the future. However, 68% think that the current power grid is not yet ready for a future in which electricity use is higher than today. Around six out of ten respondents (57%) believe that everyone should be encouraged to generate their own electricity as much as possible.

GRAPHIC: To what extent do you agree or disagree with each of the following statements?



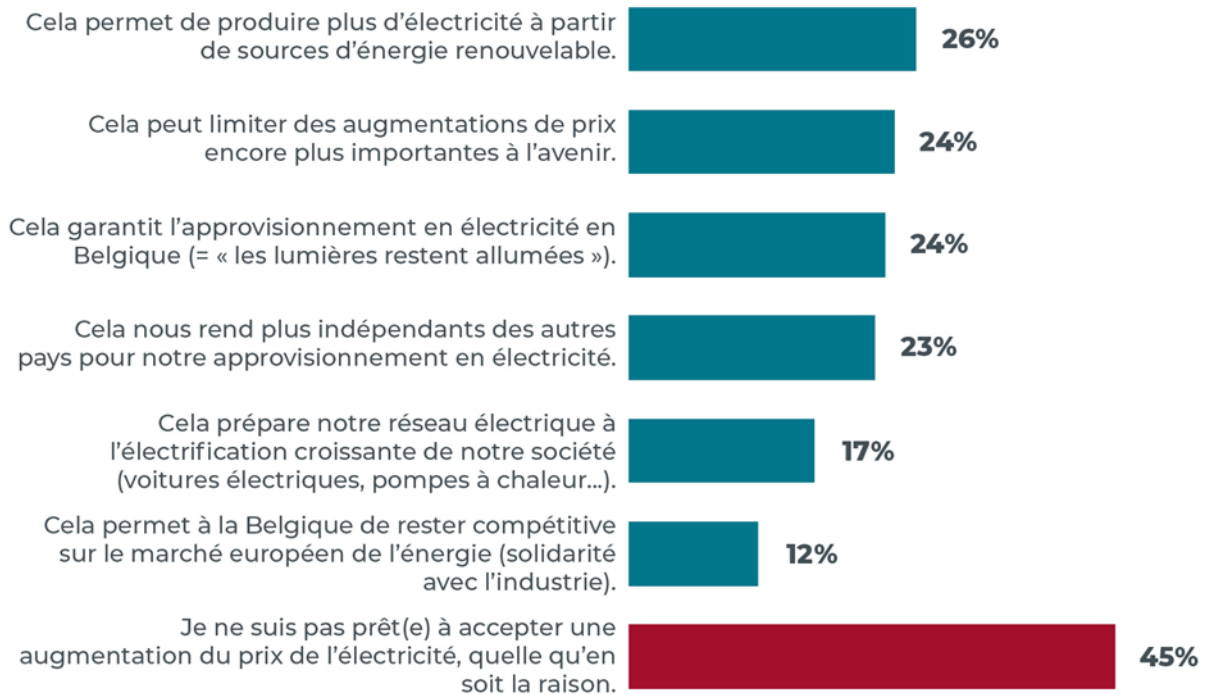
When asked to imagine a situation in which electrical facilities are going to be built near their homes, respondents reported being most opposed to fossil fuel power plants (57%), new nuclear power plants (46%) and high-voltage overhead lines (46%).

Although half of the respondents noted being annoyed by small groups of people who block energy projects in the interest of Belgian society, they still communicated a certain reluctance to limit the proceedings brought against them. 35% of respondents reported that they believe that actions taken by the opponents of major high-voltage projects will result in the country paying higher prices for electricity in the long term. 50% reported being neutral or having no opinion on the matter.

Consumers are still very sensitive to costs

Generally (45%), respondents reported not wanting to pay for these investments, or only wanting to pay for them in a limited way. A quarter of those surveyed are of the opinion that an increase in grid investments is acceptable if this generates more electricity from renewable energy sources, guarantees the country's electricity supply and our energy independence and limits larger price increases.

GRAPHIC: I am prepared to pay more for electricity if...



73% of those surveyed understand why the energy transition is an important issue for society

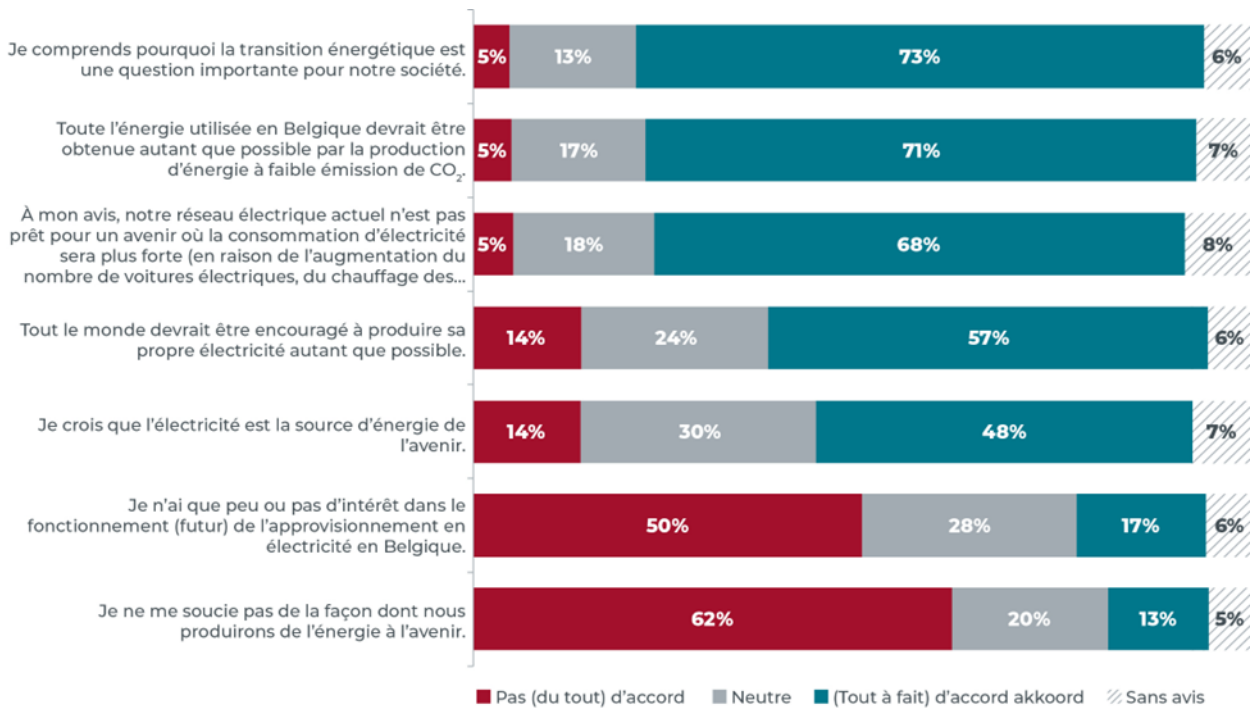
The energy transition was reflected as being an important societal issue for respondents. Furthermore, half of the respondents (strongly) disagreed with the statement that they have little or no interest in how electricity supply will work (in future) in Belgium and that they do not care about how we generate energy in the future.

54% of respondents believe that technological progress must go hand in hand with changes in behaviour. 24% reported believing that technological progress will go a long way towards mitigating the effects of climate change.

Energy-conscious respondents reported being primarily concerned about:

- the cost and affordability of energy;
- security of supply: will there always be enough electricity?
- dependence on other countries.

GRAPHIC: To what extent do you agree or disagree with each of the following statements?

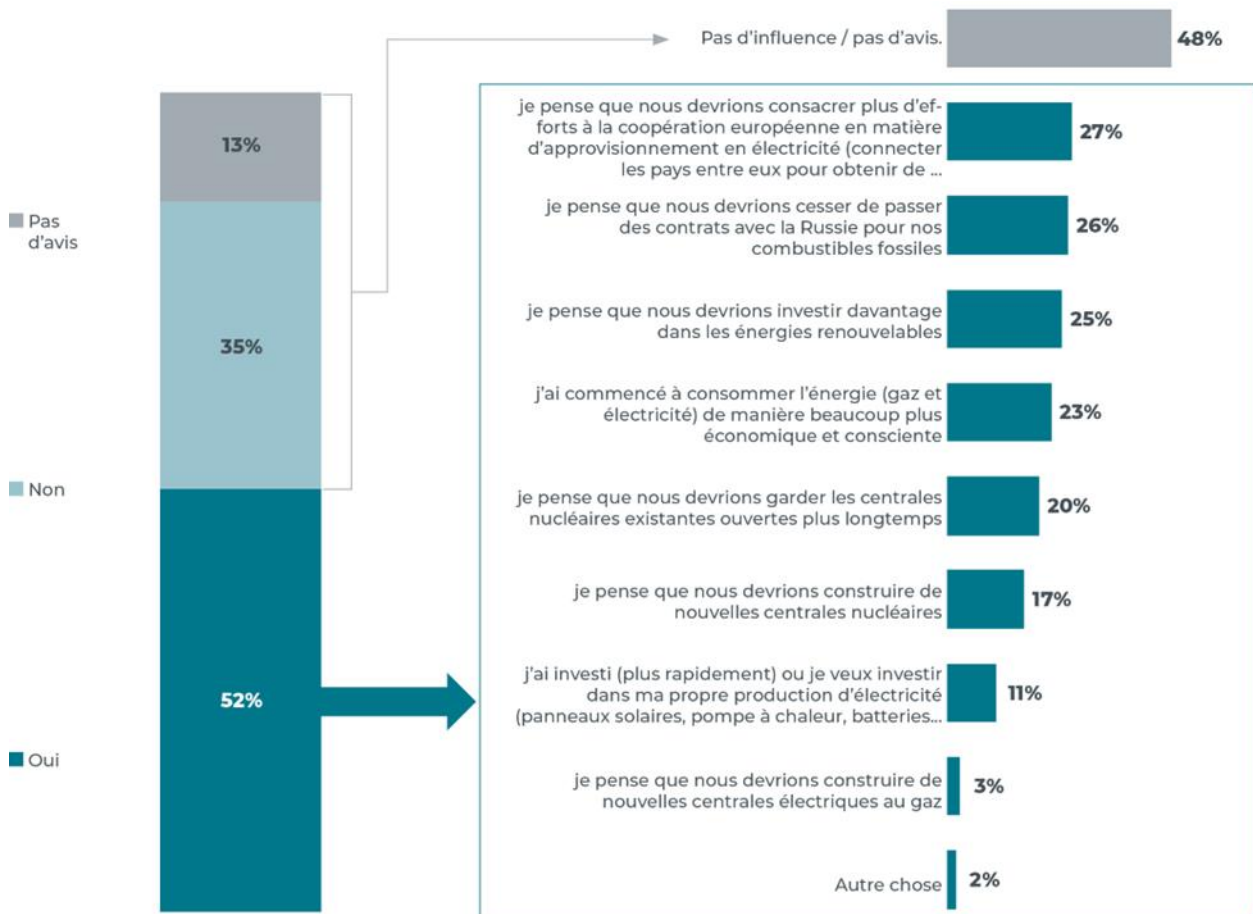


Just over half (52%) of respondents noted that the war in Ukraine has influenced their opinions about our energy supply and/or energy consumption

Such respondents believe we should devote more work to European cooperation for our electricity supply (52%) and that we should stop procuring fossil fuels from Russia (50%). 22% of those surveyed have started to consume gas and electricity in a more economical and conscious manner. 10% have even invested earlier in solar panels, a heat pump and/or batteries.

The war has also changed people's positions on nuclear energy. Among the respondents who indicated that the geopolitical context influences their opinions regarding Belgium's energy supply and/or consumption, 20% believe that we should keep existing nuclear power plants open for longer and 16% are of the opinion that we should build new nuclear power plants.

GRAPHIC: How have the war in Ukraine and the resulting geopolitical tensions influenced your views regarding our energy supply or the way you regard the topic of energy? You can provide multiple answers if you wish. "Because of the war..."



Now more than ever, it is necessary to raise public awareness about energy-related issues

It is necessary to raise awareness about various areas of the energy sector.

For example, in terms of respondents who reported already owning a digital electricity meter (42%), 40% use apps to track their own electricity consumption. 36% of respondents noted that they know it is possible but don't actually do it. Almost one in five respondents (18%) do not know it's possible.

Another finding from the survey relates to the capacity tariff. A quarter (26%) of individuals residing in Flanders reported that they have never heard of the capacity tariff. 37% of people who have heard of it reported not knowing exactly what it is and what its impact on their electricity bills is.

73% of respondents confirmed that they understand that the energy transition is an important issue for society. Those surveyed know that it is linked to the climate, but rarely made the connection between this and sustainable industrialisation. They were not able to properly estimate its impact on their daily lives.

Respondents who already have a digital meter at home reported having a much more favourable opinion of them (48% compared to 34% on average). The four aspects that respondents raised most often with respect to digital electricity meters were positive: having a better overview of their own consumption (42%); the possibility of being billed based on the actual volume of energy they consume (38%); automatic meter readings (36 %); and clear overview of consumption data (35%).

However, 44% of respondents noted being concerned about the amount of personal data transmitted via digital meters. Only 36% of respondents explicitly trust that companies and institutions with access to their personal data handle it responsibly.

Just under half of respondents who do not yet have a digital electricity meter want to keep it that way for as long as possible. This figure rises to 76% when it comes to the owners of solar panels.

ETB's memorandum, entitled **POWERING BELGIAN SOCIETY - FOR A CLEAN AND COMPETITIVE FUTURE**, can be accessed below:

French version: <https://www.poweringbelgium.be/fr>

Dutch version : <https://www.poweringbelgium.be/>



About Elia Group

One of Europe's top five TSOs

Elia Group is a key player in electricity transmission. We ensure that production and consumption are balanced around the clock, supplying 30 million end users with electricity. Through our subsidiaries in Belgium (Elia) and the north and east of Germany (50Hertz), we operate 19,460.5 km of high-voltage connections, meaning that we are one of Europe's top 5 transmission system operators. With a reliability level of 99.99%, we provide society with a robust power grid, which is important for socioeconomic prosperity. We also aspire to be a catalyst for a successful energy transition, helping to establish a reliable, sustainable and affordable energy system.

We are making the energy transition happen

By expanding international high-voltage connections and incorporating ever-increasing amounts of renewable energy into our grid, we are promoting both the integration of the European energy market and the decarbonisation of society. We also continuously optimise our operational systems and develop new market products so that new technologies and market parties can access our grid, thus further facilitating the energy transition.

In the interest of society

As a key player in the energy system, Elia Group is committed to working in the interest of society. We are responding to the rapid increase in renewable energy by constantly adapting our transmission grid. We also ensure that investments are made on time and within budget, with a maximum focus on safety. In carrying out our projects, we manage stakeholders proactively by establishing two-way communication channels between all relevant parties very early on in the development process. We also offer our expertise to different players across the sector in order to build the energy system of the future.

International focus

In addition to its activities as a transmission system operator, Elia Group provides consulting services to international customers through its subsidiary Elia Grid International. In recent years, the Group has launched new non-regulated activities such as re.alto - the first European marketplace for the exchange of energy data via standardised energy APIs - and WindGrid, a subsidiary which will continue to expand the Group's overseas activities, contributing to the development of offshore electricity grids in Europe and beyond.

The legal entity Elia Group is a listed company whose core shareholder is the municipal holding company Publi-T.

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