

# Cleantech: Imagining a Future Possible

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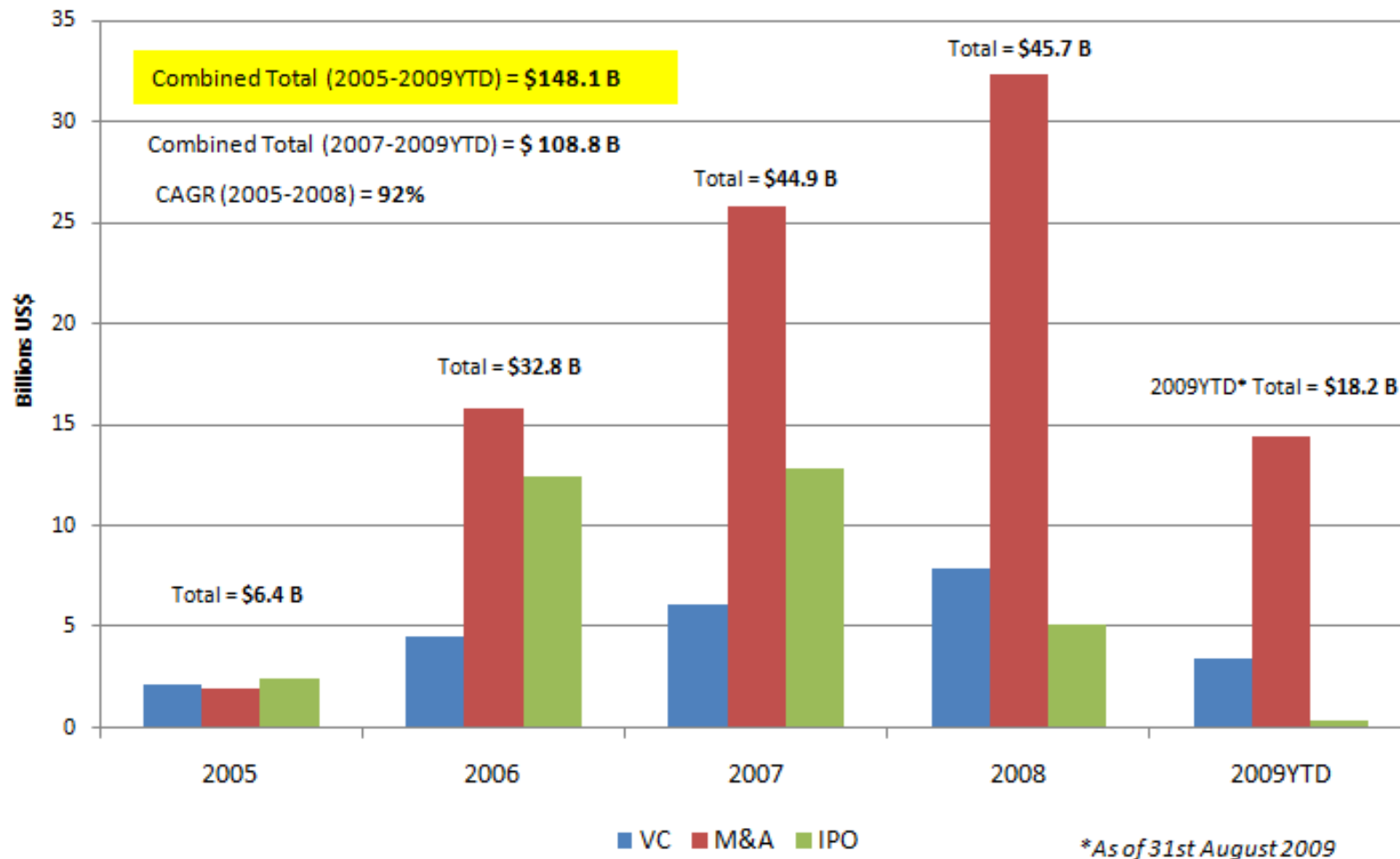
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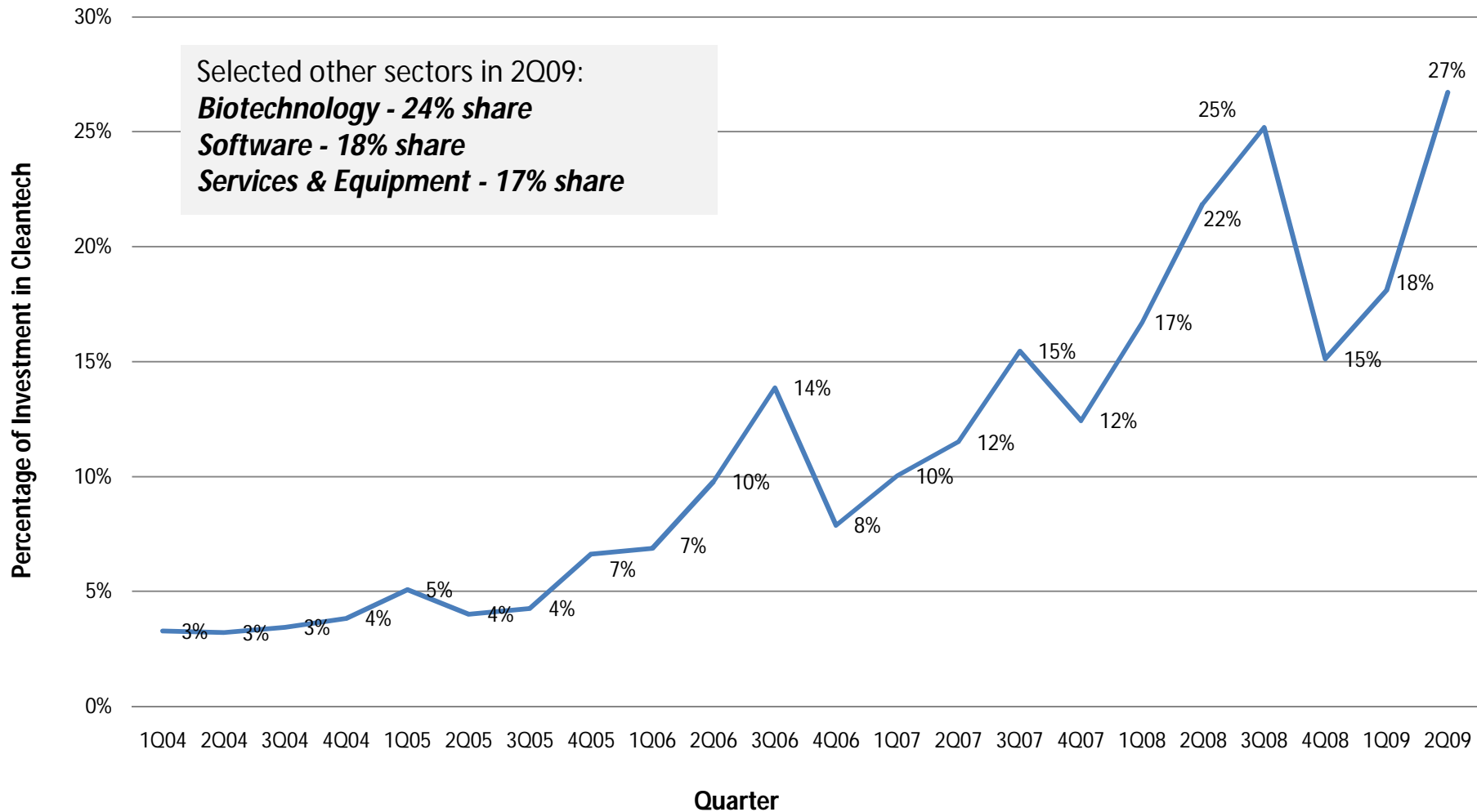


# Private Capital for Cleantech Innovation tops \$100B

## Innovation Financing in Global Cleantech 2005 - 2009 YTD\*



# Cleantech now largest U.S. VC Category.



Source: Cleantech Group, PWC MoneyTree Report

# Low Carbon Investment of \$200B+/Year Required

***Stern Review (2006)*** - Suggested committing 1% of GDP (\$350-480 billion per annum) to cut carbon emissions. In June 2008 Stern increased the estimate to 2% of GDP to account for faster than expected climate change. Amounts to approximately **\$9 trillion** between now and 2020.

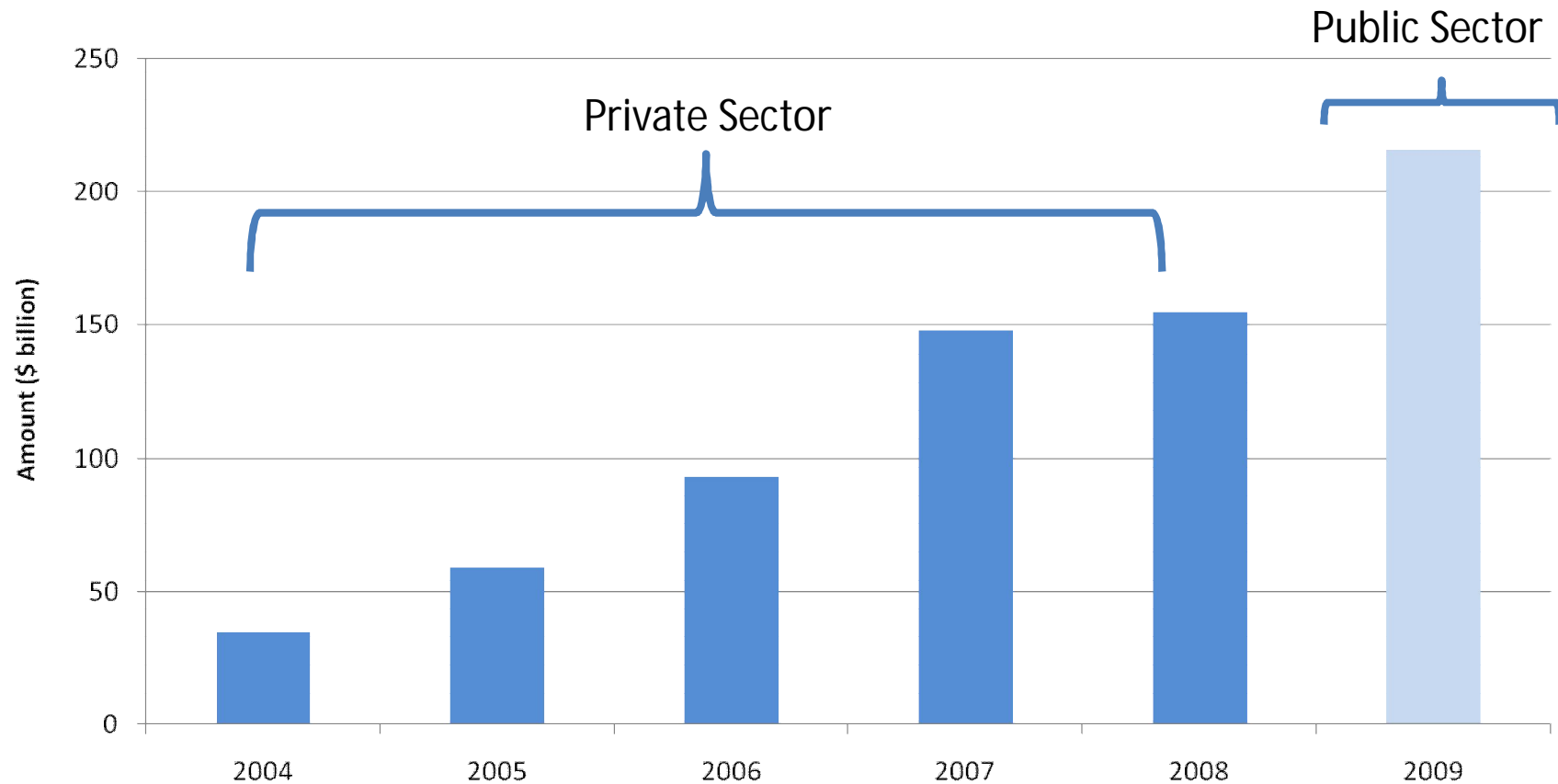
***UNFCCC (2007)*** - The United Nations Framework Convention on Climate Change said that to mitigate climate change, required investment is \$200 billion per annum or 0.3% of global GDP, until 2030. Amounts to approximately **\$2.2 trillion** between now and 2020.

***OECD (2008)*** – The Organisation for Economic Co-operation and Development estimates that climate change can be mitigated at a cost of 0.5% of estimated global GDP in 2030. Amounts to approximately **\$2 trillion** between now and 2020.

***World Economic Forum(March 2009)*** - Investment needs to reach \$500 billion a year by 2020. Amounts to approximately **\$3.9 trillion** between now and 2020.

# Global Stimulus Spending on Cleantech in 2009

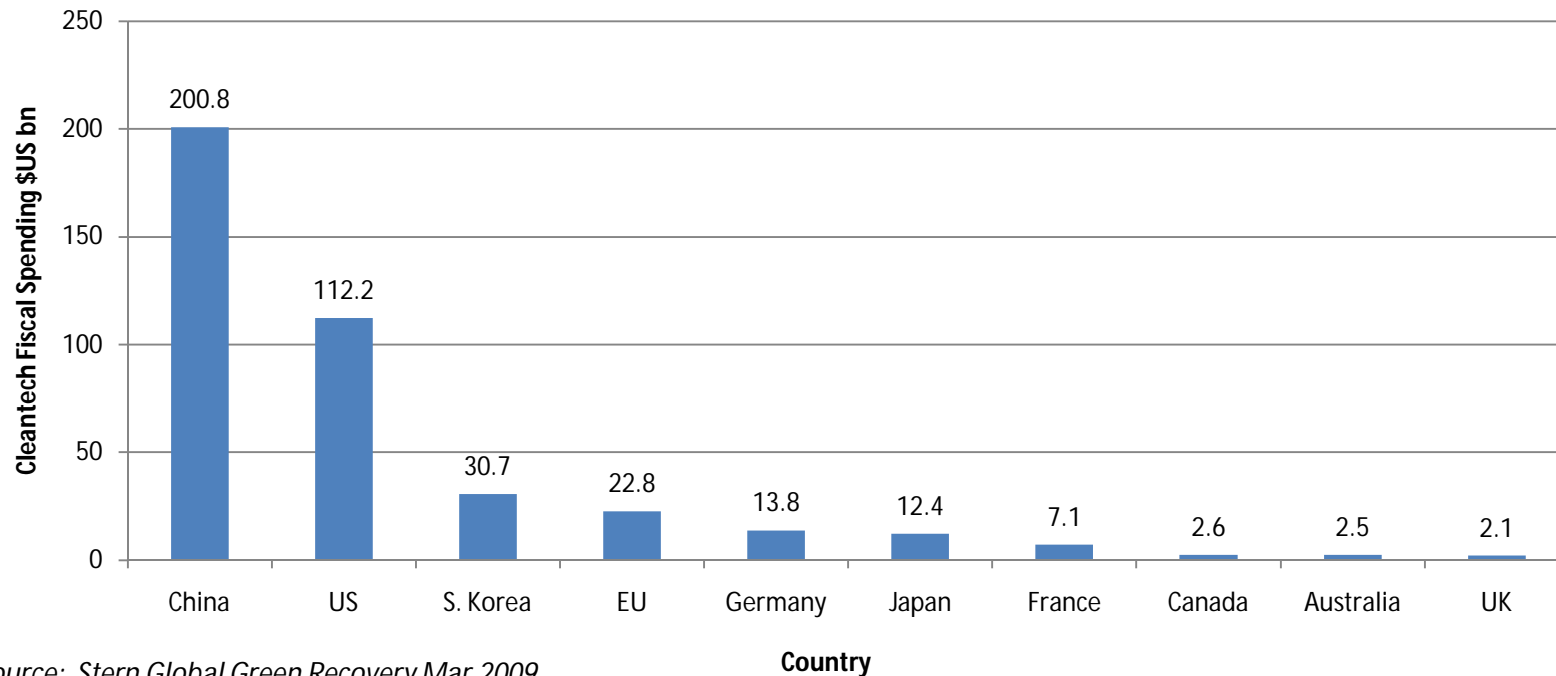
**Total Global New Investment in Clean Energy 2004-2008 and Projected Stimulus Spending in 2009**



Sources: Cleantech Group, WEF, IEA WEO 2008 and HSBC

# What was pledged to cleantech during 2H08 and 1H09

## A Summary of Global Cleantech Fiscal Measures

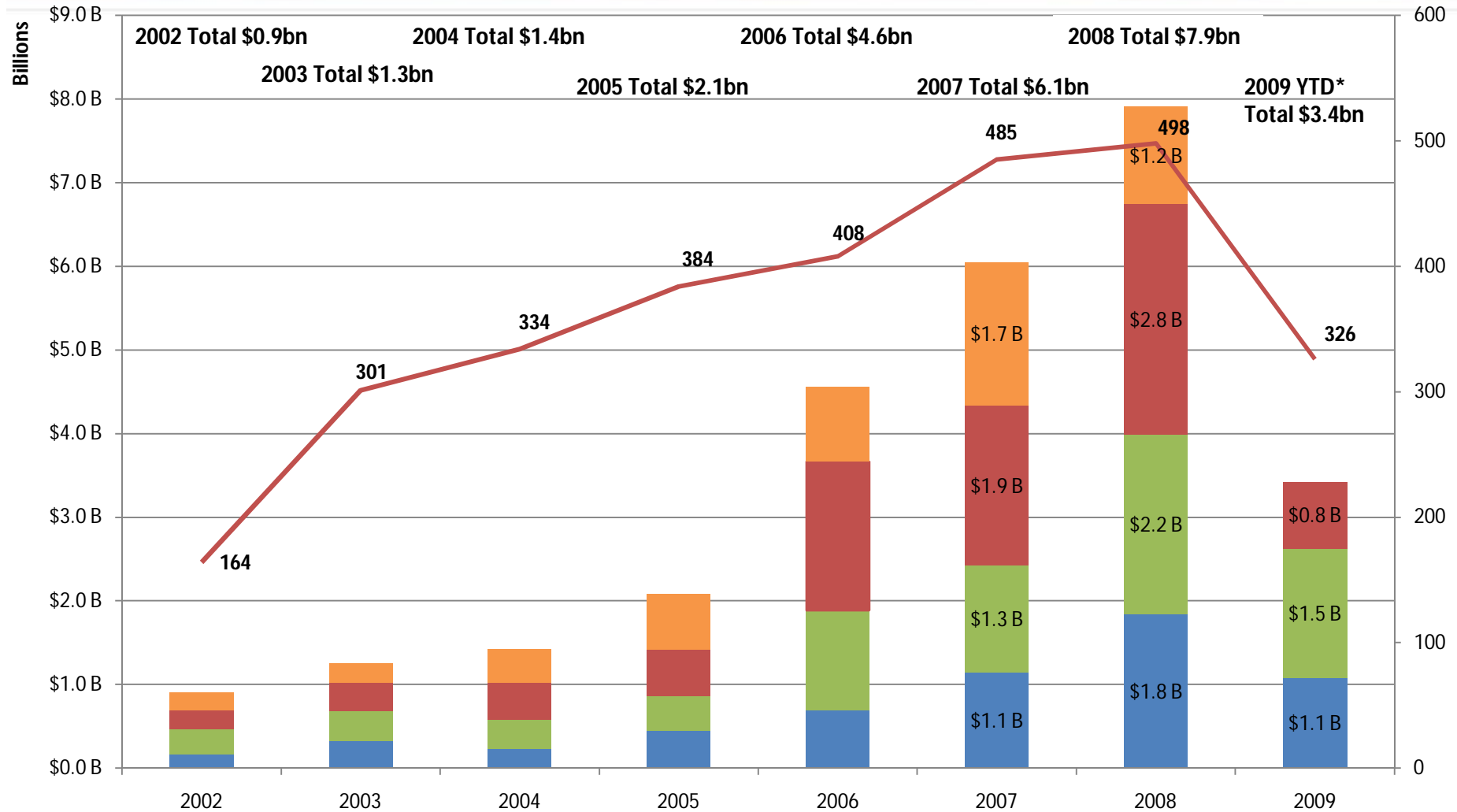


Source: Stern Global Green Recovery Mar 2009

“More than \$512bn of the global stimulus outlined so far will be devoted to green projects, although the full effect on clean technology companies will not be felt until the end of this year through to 2011. With expected multiplier effects, the total spending impact now tops \$1,000bn.”

**HSBC analyst, Nick Robins (August 24<sup>th</sup> 2009)**

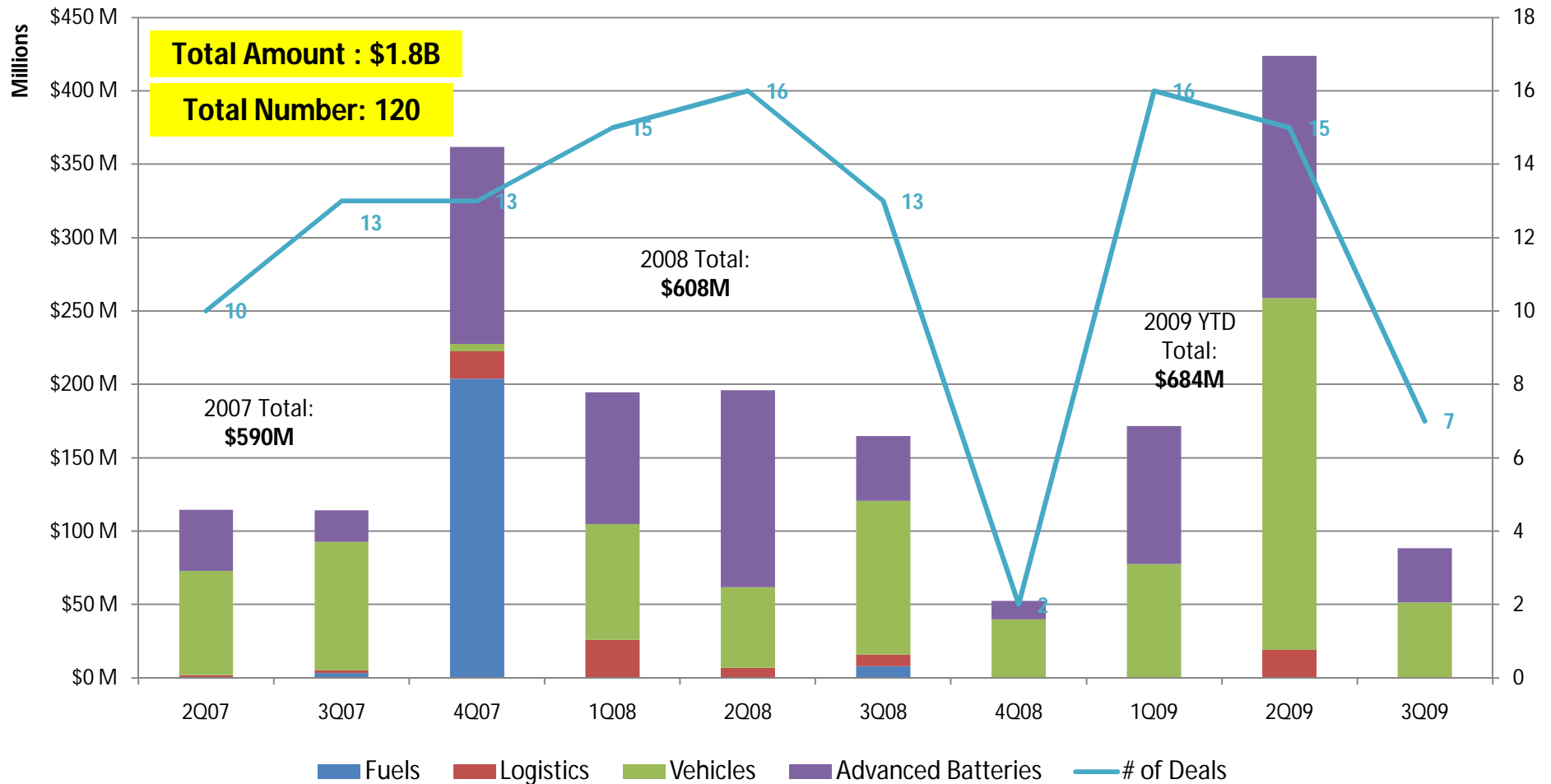
# Global Cleantech VC Investments 2002-2009 YTD\*



Source: Cleantech Group

# Transportation at all-time high

## Venture Investment in Transportation (including Batteries)

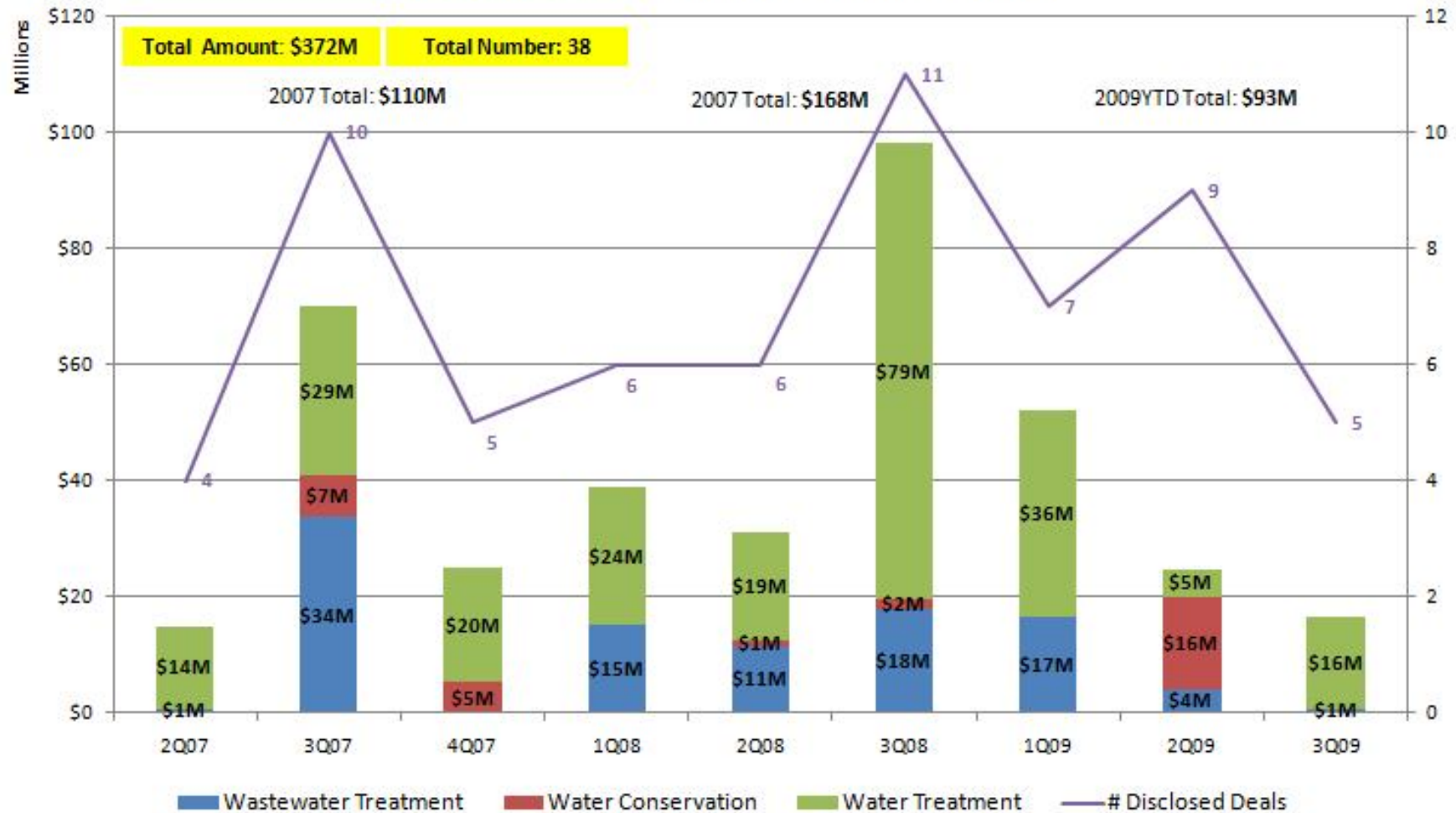


Source: Cleantech Group



# Water still at low levels relative to need

## Venture Investment in Water Technologies



## 3.0 Clean Economy Transformative Institutions

- History shows up to 2 dozen are required. Candidates:
  - Wal\*Mart
  - White House
  - GE
  - Veolia
  - UAE
  - Singapore
  - P8
  - International Finance Corporation
  - The Entrepreneurial Families
  - McKinsey & Co.

## Other cleantech investment areas:

- Other sectors:
  - Green building: 2008: \$370M
  - Recycling: 2008: \$286M – focus on plastic/rubber recycling