



Alternative Energy Session

Moderator: Carl L. Wilkins

Director, Renewables & Energy Efficiency



Our Panelists

- Richard Ashby, Chief Financial Officer, Renewable Energy Systems (RES) Americas Inc.



- Matt Ferguson, Principal and Practice Leader, Renewable Energy Practice, Reznick Group, P.C.



- Dana F. Flanders, President, Chevron Technology Ventures



Many Names of Energy

- Alternative Energy
- Green Energy
- Clean Energy
- **Renewable Energy**
- Carbon-free Energy
- **Clean Technology (Clean Tech)**

The Color of Renewable Energy

“The environment and profit go hand in hand. Investment in Clean Tech is all about the green, not the environment”

Ira Ehrenpreis

General Partner

Technology Partners

Clean Tech Investor Summit, February 2009

President Obama's 2009 State Of the Union Address

“We are a nation that has seen promise amid peril, and claimed opportunity from ordeal. Now we must be that nation again. That is why, even as it cuts back on the programs we don't need, the budget I submit will invest in the three areas that are absolutely critical to our economic future: **energy**, health care, and education. **It begins with energy.**

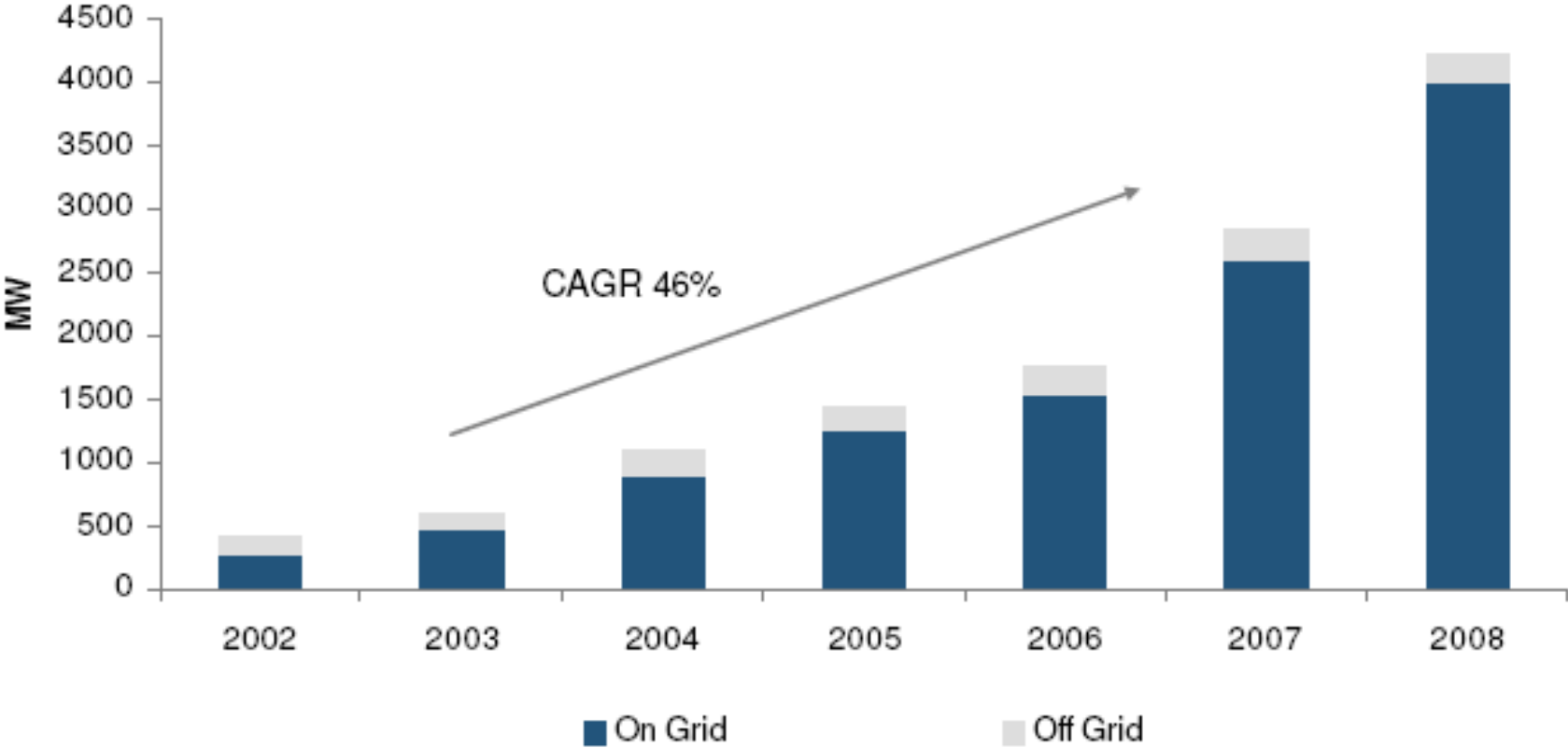
We know the country that **harnesses the power of clean, renewable energy** will lead the 21st century. And yet, it is China that has launched the largest effort in history to make their economy energy efficient. We invented solar technology, but we've fallen behind countries like Germany and Japan in producing it. New plug-in hybrids roll off our assembly lines, but they will run on batteries made in Korea. Well I do not accept a future where the jobs and industries of tomorrow take root beyond our borders – and I know you don't either. It is time for America to lead again. Thanks to our recovery plan, **we will double this nation's supply of renewable energy in the next three years.** We have also made the largest investment in basic research funding in American history – an investment that will spur not only new discoveries in energy, but breakthroughs in medicine, science, and technology. We will soon lay down thousands of miles of power lines that can carry new energy to cities and towns across this country. And we will put Americans to work making our homes and buildings more efficient so that we can save billions of dollars on our energy bills. But to truly transform our economy, protect our security, and save our planet from the ravages of climate change, **we need to ultimately make clean, renewable energy the profitable kind of energy.** So I ask this Congress to send me legislation that places a market-based cap on carbon pollution and drives the production of more renewable energy in America.”

Renewable Energy Investment Climate

- Renewable energy policies have never been more favorable
- Limited credit availability and low appetite for risk
- Strong performance once credit loosens and economy rebounds

Growth of Solar PV

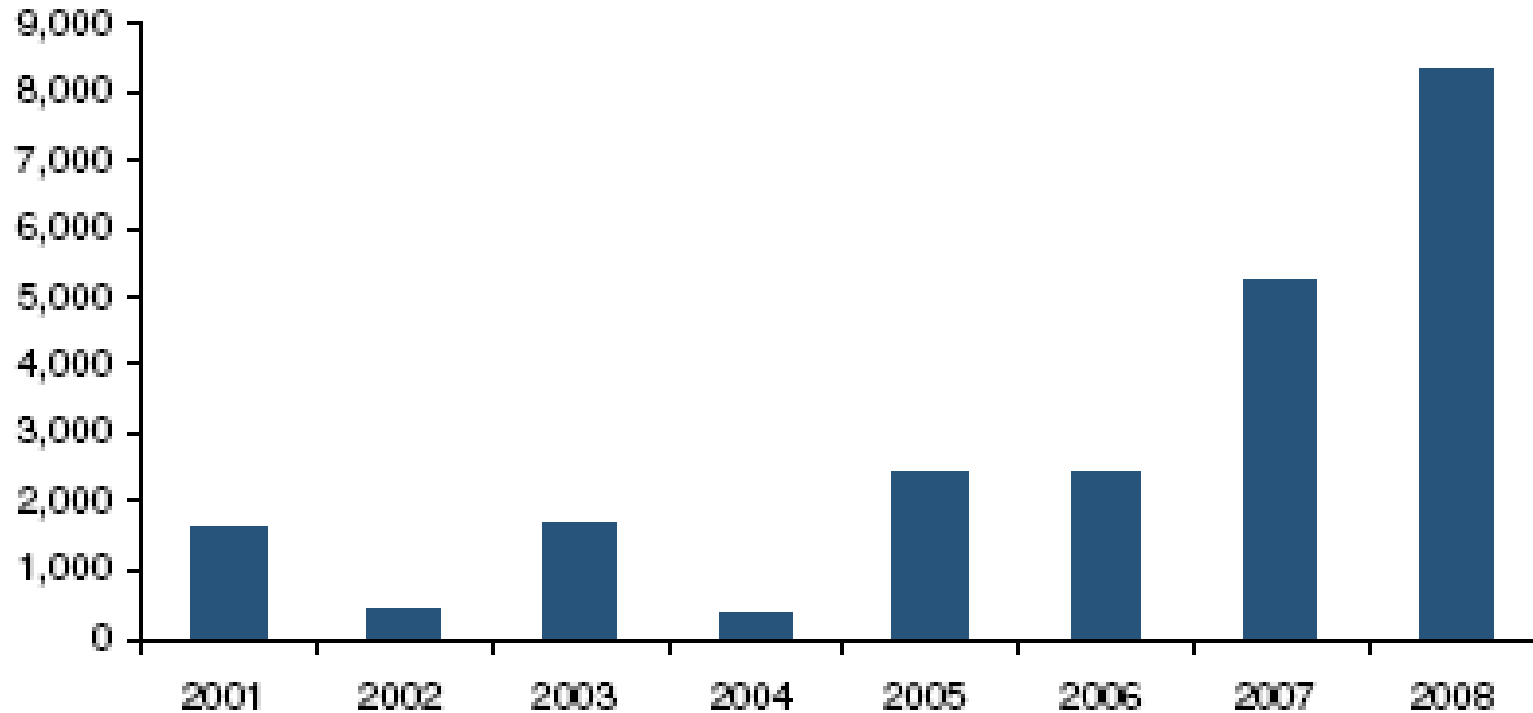
PV Installations



Source: www.solarbuzz.com & Jeffries & Co. Inc.

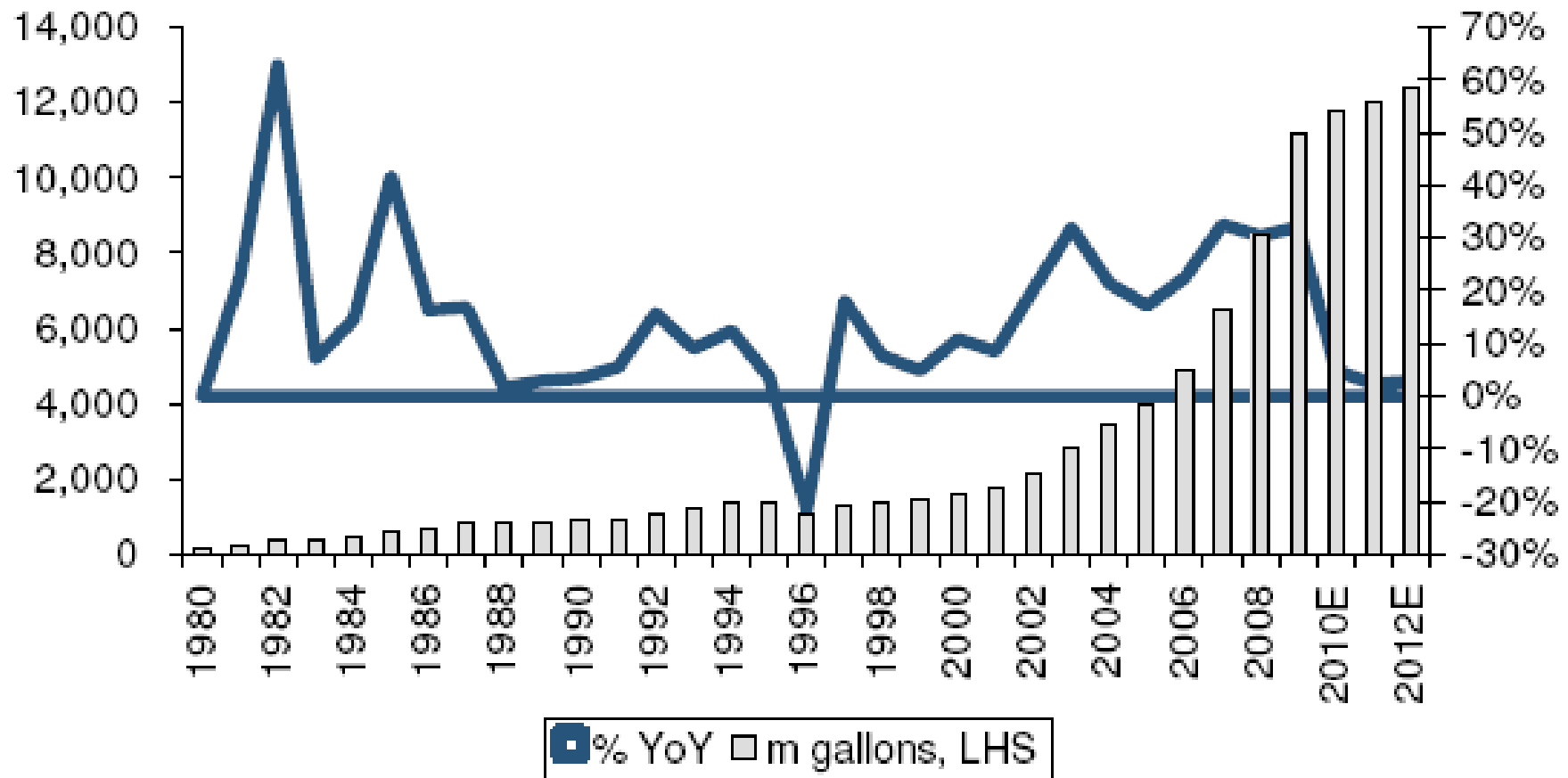


Wind Installations in U.S.



Source: BTM Consult, GWEC

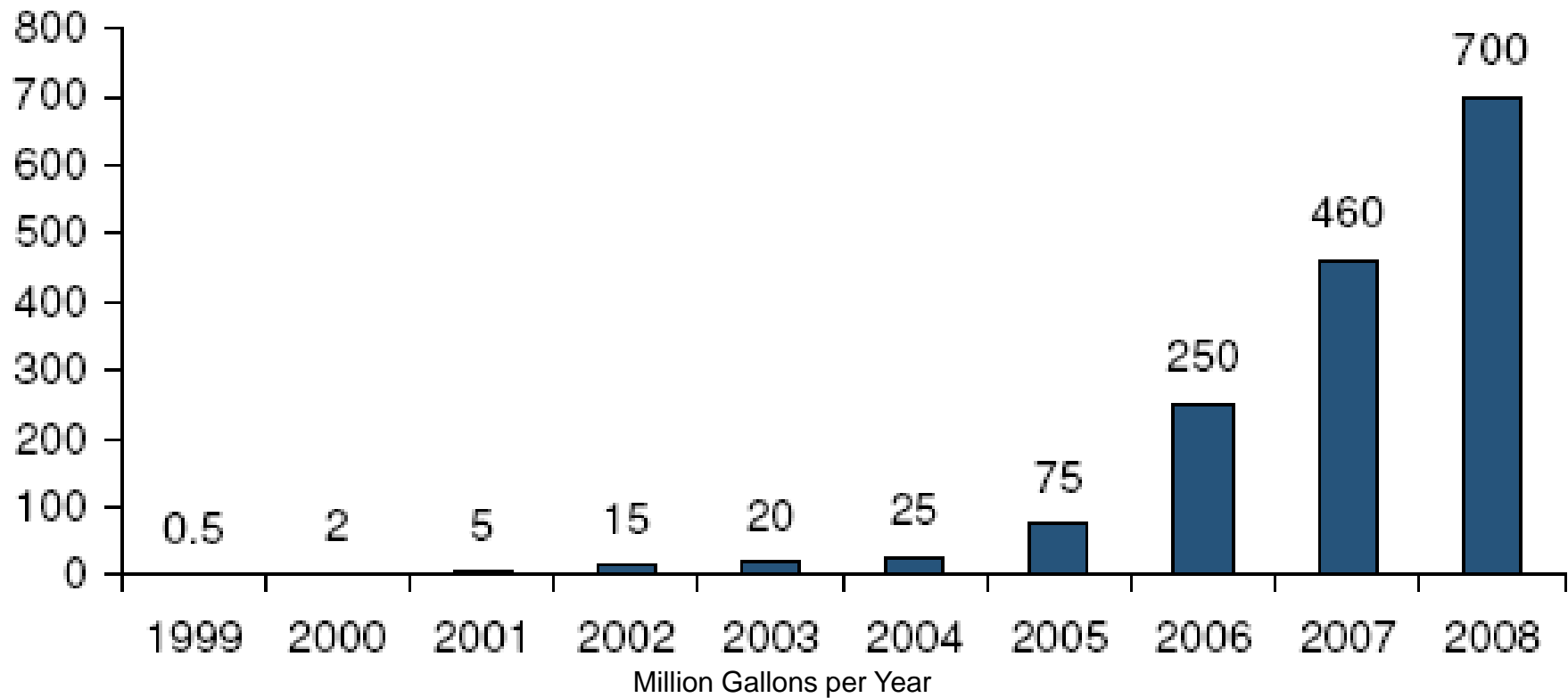
Ethanol Production in U.S.



Source: Renewable Fuels Association



Biodiesel Production in U.S.

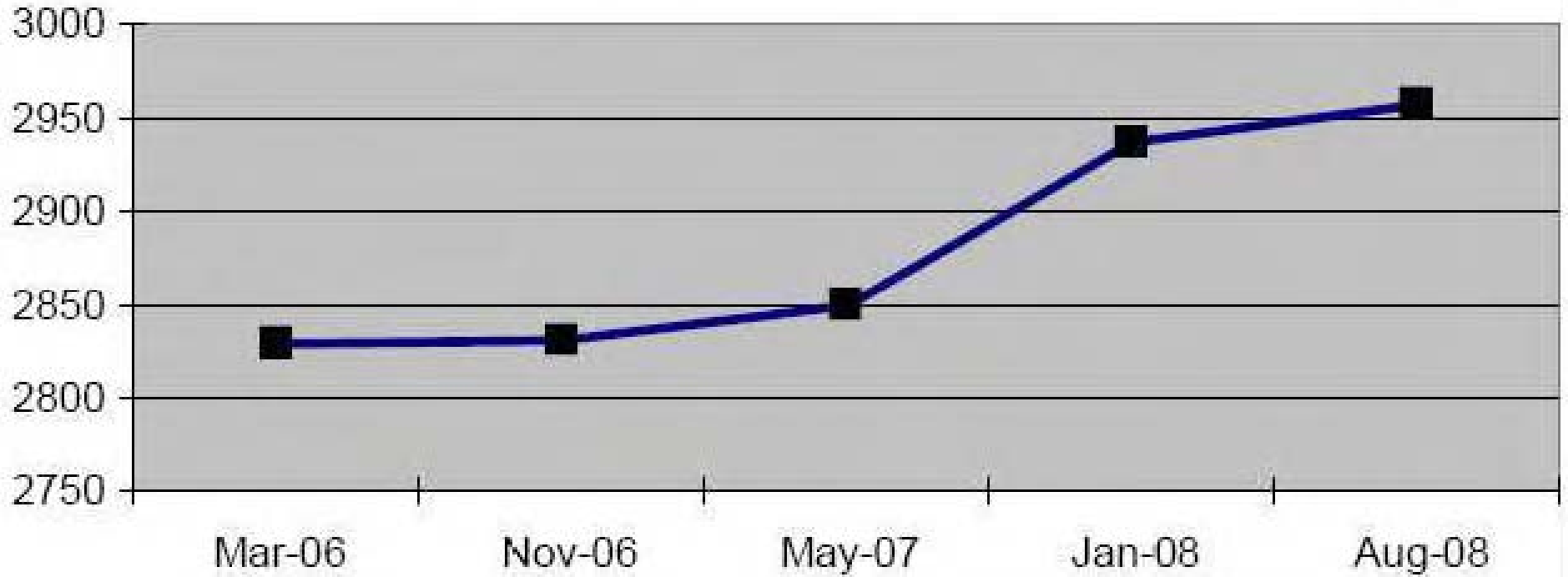


Compared to 60 Billion Gallons per Year consumption



Growth of Geothermal in U.S.

Megawatts

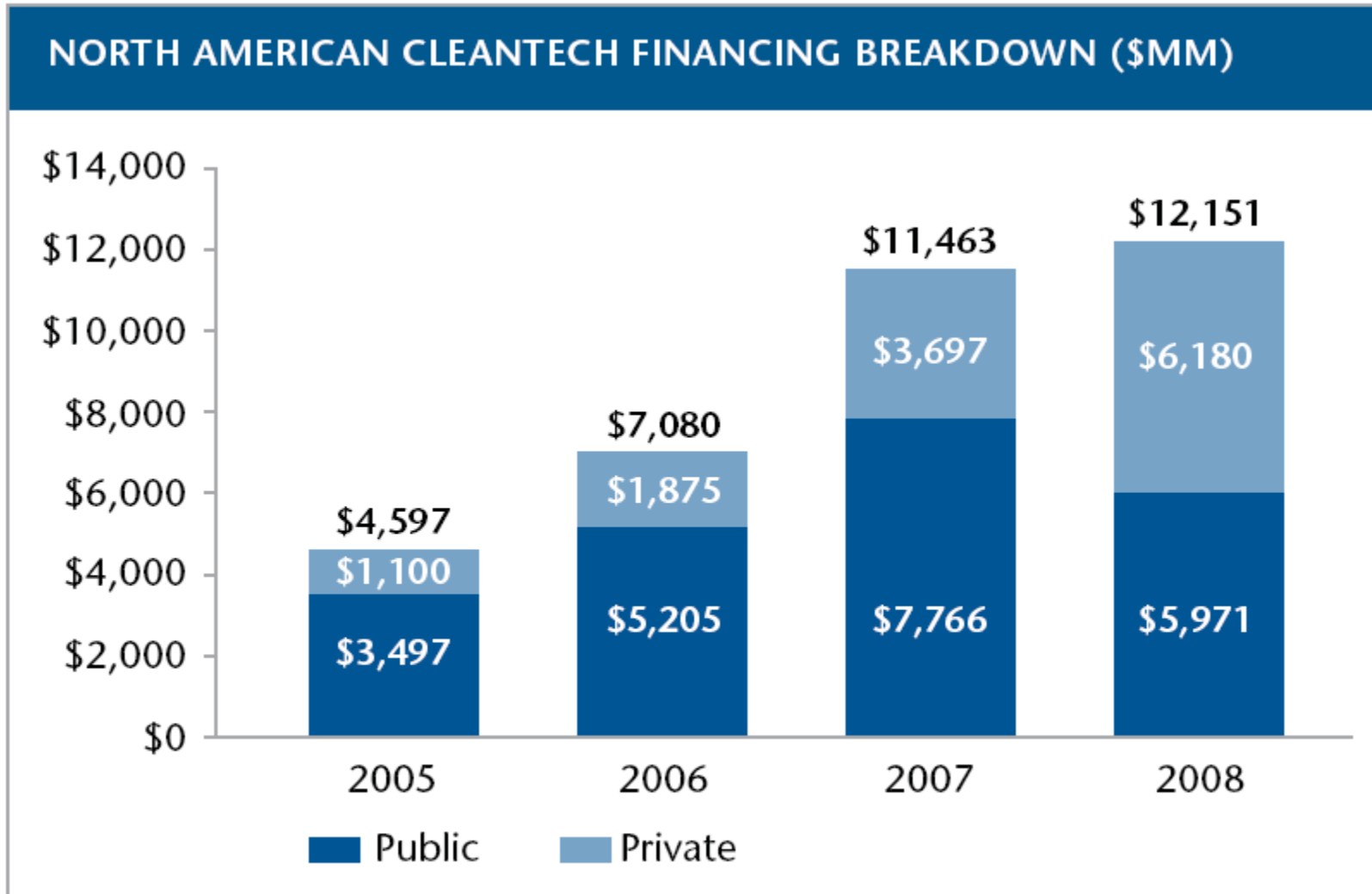


Alaska	California	Hawaii	Idaho	Nevada	New Mexico	Utah	Total
0.4 MW	2555.3 MW	35 MW	13 MW	318 MW	.24 MW	36 MW	2957.94 MW

Source: GEA

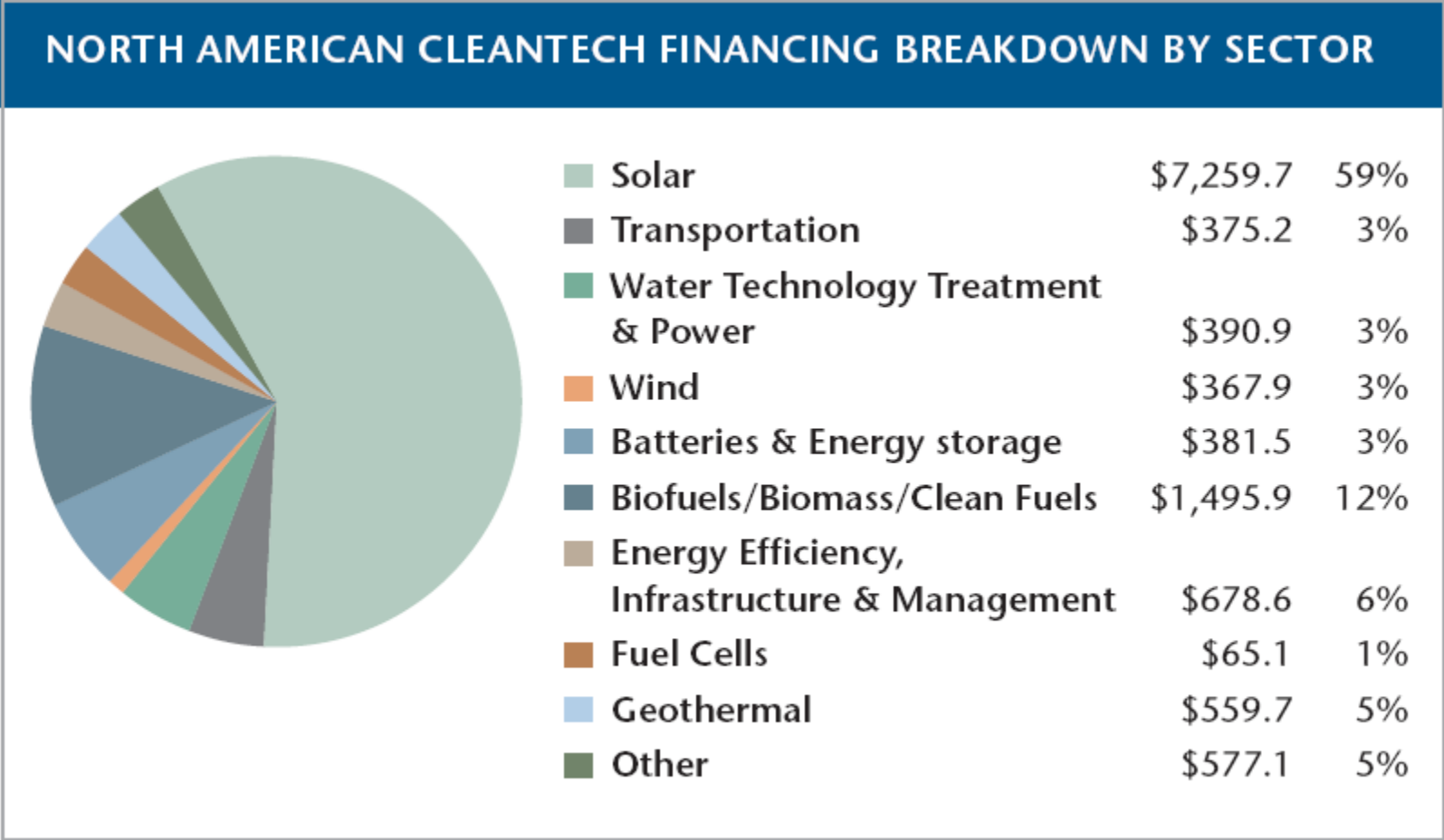


Investment in Clean Tech



Source: Bloomberg, Capital IQ, Factiva, Jefferies and New Energy Finance.

Clean Tech Investment Sectors



Source: Bloomberg, Capital IQ, Factiva, Jefferies and New Energy Finance.



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Quanta Services

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- ◆ **Publicly traded company (NYSE: PWR)**

* Source: McGraw-Hill ECN



Organization

