

7th Annual
tech
INVESTOR SUMMIT

CLEAN EDGE

HOME AGENDA ADVISORY BOARD SPEAKERS RESOURCES VIDEOS CONTACT REGISTRATION & HOTEL

Agenda



Tuesday, January 18th, 2011

5:00PM - 6:30PM **Welcome Reception Hosted by: Ernst & Young**

Wednesday, January 19, 2011

7:00AM - 9:00AM **Registration & Networking Breakfast Hosted by: Deloitte**

9:00AM - 9:45AM

Welcome

Conference Chairman's Opening "State of the Clean-Tech Industry"

Ira Ehrenpreis, General Partner, Technology Partners

9:45AM - 10:30AM

Fireside Chat: Inside D.C. – Clean Energy, Global Competition, and the Role of Government Policy

Cathy Zoi, Acting Under Secretary for Energy and the Assistant Secretary for Energy Efficiency & Renewable Energy, US Department of Energy

In conversation with:

Ira Ehrenpreis, General Partner, Technology Partners

10:30AM - 11:00AM

Networking Break & Innovation Showcase sponsored by Autodesk

11:00AM - 11:45AM

Tech Trend: Natural Gas and Renewables: A Perfect Match or Misguided Concept?

One of the biggest hurdles facing solar, wind, and some other renewables is their intermittent nature. Pairing renewables with base-load natural gas (especially in areas lacking large hydro and geothermal sources) is a potential option for enabling the growth of utility-scale renewables, but it includes both promises and pitfalls. On this panel, industry insiders explain how plans are moving forward for these strange bedfellows, who the key players are, and what it might mean for the future of renewables and natural gas. The panel will also look at the intersection of technology, policy, and finance in growing the renewables, natural gas, and efficiency triangle.

Moderated by **Dan Reicher**, Executive Director, Steyer-Taylor Center on Energy Policy and Finance, Stanford University

Andrew Littlefair, President and CEO, Clean Energy Fuels

Carl Pope, Chairman, Sierra Club

Vikram Rao, Former CTO, Halliburton and current Executive Director of RTEC (Research Triangle Energy Consortium)

11:45AM - 12:15PM

Corporate Keynote:

Malcolm Unsworth, President and CEO, Itron Inc.

Concerns for our climate, dwindling energy and water supplies, aging or limited infrastructure, and strains on the economy are impacting utilities around the globe — in very unique and challenging ways. These challenges are driving regulatory and environmental mandates and accelerating the rate at which utilities need to respond. Itron CEO Malcolm Unsworth will focus on these issues and highlight how Itron, and the energy and water intelligence marketplace, are responding to a new and rapidly changing environment.

12:15PM - 2:00PM

Luncheon with Keynote and book signing Hosted by: Orrick

John Hofmeister, Former President, Shell Oil Company; Founder and CEO Citizens for Affordable Energy, Inc.; and Author, *Why We Hate the Oil Companies*

2:00PM - 2:45PM

Dialogue: The New GM and Clean-Tech Innovation

In conversation with **Andrew Shapiro**, Founder and President, Green Order

Jon Lauckner, GM Vice President and President General Motors Ventures, LLC

After holding a number of leadership roles at General Motors over the last two decades, Jon Lauckner recently became President of GM Ventures, the company's venture capital arm, which was formed in June 2010. Earlier, Jon played a key role in developing the award-winning Chevrolet Volt electric vehicle. Jon will engage in a candid dialogue with Andrew Shapiro of GreenOrder, a firm that has worked with many leading companies on environmental innovation, to discuss the new GM, its venture activity, and the role of clean technology in its strategy.

2:45PM - 3:15PM

Networking Break & Innovation Showcase sponsored by Autodesk

- 3:15PM - 4:15PM **Point/Counterpoint: Nuclear Power: A Critical Solution or a Costly Mistake?**
- In January of 2006, Ralph Cavanagh and Peter Schwartz had an intellectual, inspiring, and heated conversation exploring the pros and cons of nuclear power at the Herbst Theater in San Francisco. Now, five years later, we are bringing them together again for a conversation as important as ever. Is nuclear power required to meet the challenges of climate change and potential planetary collapse? Or are there better pathways, is it too expensive, and is it quite literally, explosive? Ron Pernick, of Clean Edge and the Clean-Tech Investor Summit, will moderate this important and timely conversation.
- Moderated by: **Ron Pernick**, Managing Director, Clean Edge, Inc. and Co-Author, *The Clean Tech Revolution*
- Ralph Cavanagh**, Co-Director, Energy Program, Natural Resources Defense Council
- Peter Schwartz**, Co-Founder and Chairman, Global Business Network and Partner, Monitor Group
- 4:15PM - 5:00PM **First Day Closing Keynote: IPO Spotlight**
- Elon Musk was named the 2010 Auto Executive of the Year and one the 100 most influential people of 2010 by *Time Magazine*. In this year's IPO Spotlight, hear directly from the man who co-founded Tesla and led the company through its recent initial public offering (IPO) – the first for a U.S. car company since Ford Motor Company's IPO in 1956. Tesla's stock began trading on the NASDAQ stock market in late June 2010 and the company's market cap is now valued at around \$3 billion.
- Elon Musk**, Chairman, Product Architect, and CEO, Tesla Motors
- 5:00PM - 7:00PM **Cocktail Reception and Dinner Hosted by: Baird**
- 7:00PM - 9:00PM **Evening Entertainment & Casino Night Hosted by: Wells Fargo**

Thursday, January 20, 2011

- 7:30AM - 9:00AM **Networking Breakfast Hosted by: Deloitte**
- 9:00AM - 9:30AM **Keynote: Beyond Climate: Driving Clean-Tech Growth Through Pure Economics**
- T.J. Rogers**, Founder and CEO, Cypress Semiconductors
- Growth of the Clean-Tech industry is being driven by politics, not science, in many cases. Too often, it seems, the government is bailing out or subsidizing companies or industries that it deems "too big to fail," "green," or "for the common good." Is it right for the government to pick and choose which industries should survive by artificially supporting them with subsidies? Is this a good use of taxpayer dollars, or should taxpayers be fed up with how the government is spending its money? T.J. Rodgers makes the case that in a successful economy, companies or industries should thrive or fail based solely on their performance and classic supply and demand principles.
- 9:30AM - 10:00AM **Straight from the Source: U.S. Loan Guarantees – Where They've Been and Where They're Headed**
- Jonathan Silver**, Executive Director, U.S. Department of Energy's Loan Guarantee Program
- 10:00AM - 10:45AM **Funding Growth Panel: Case Studies and Examples**
- In Conversation with **Ira Ehrenpreis**, General Partner, Technology Partners
- John Woolard**, CEO, Brightsource
- Tom Tiller**, CEO, Abound Solar
- 10:45AM - 11:15AM **Networking Break & Innovation Showcase sponsored by Autodesk**
- 11:15AM - 11:45AM **Innovators' Hot Seat**
- Warner Philips**, Co Founder, Lemnis and President, Lemnis Lighting USA
- Solid state lighting could be the wave of the future. It overcomes many of the issues associated with compact fluorescents (CFLs) such as mercury content, and provides greater efficiency and longer life. But LED bulbs currently cost around 10X CFLs. This year we are excited to have Warner Philips, the great grandson of the man who founded Dutch lighting giant Philips, and cofounder of global LED manufacturer Lemnis. Could this Philips heir give the big guns at GE, Siemens, and yes, even Philips, a run for their money? In this year's Innovators' Hot Seat we'll give Warner 15 minutes to tell his innovators' story and the promise and perils of LEDs – and then we'll open up the mic for 15 minutes of questioning from Summit board members and the audience.
- 11:45AM - 12:30PM **Exit Panel**
- All signs are pointing to a strong year for clean-tech IPOs, perhaps the first of several such years on the horizon. On this panel, we will explore the U.S. IPO market, starting first with the outlook on the buy side in 2011. Next, we'll investigate international markets for liquidity and M&A more broadly. Finally, we'll discuss what investors need to be doing to prepare their portfolio companies for exit.
- Moderator: Erik Straser**, General Partner, Mohr, Davidow Ventures
- Panelists:**
- Jeff Adams**, Managing Director, Goldman Sachs
- Adam E. Bergman**, Director, Clean-Tech Investment Banking, Deutsche Bank Securities
- Russ Landon**, Managing Director, Clean Technology Practice, Keybank
- Gary D. Vollen**, Managing Director, Investment Banking, Robert W. Baird & Co.

12:30PM - 1:30PM

Luncheon with Keynote Hosted by: PWC**Thomas Steyer**, Founder and Co- Managing Partner, Farallon Capital Management, LLC

Steyer, asset manager, philanthropist, and environmentalist, recently led the charge in defeating Prop 23 and is responsible for funding the creation of the TomKat Center for Sustainable Energy at Stanford University. He is a leading investment manager and in 2010, Steyer and his wife, along with Warren Buffett and Bill Gates, signed the Giving Pledge to donate half their fortune to charity. Hear him talk about the major defeat of Prop 23 in California, the emergence of clean tech as an investment, policy, and educational driver, and where he sees things going in 2011 and beyond.

1:30PM

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