

## CONFERENCE BY DAY

## Monday, April 16th

12:30-4:30 PM

**Cleantech Tour of Munich**

For the 4th year running, back by popular demand, we offer this pre-Forum networking opportunity to see some of the cleantech sights of our host city.

The tour will have a transportation focus and will first stop at BMW World. Here, we will receive a guided tour of the building, accompanied by project manager Manual Sattig, an expert on BMW's new mobility initiative, BMWi. We will then move to the nearby Lake Starnberg to see and test drive some pioneering electric motorboat outboards, developed by an upcoming local startup, Torqeedo. Here, we will be accompanied by Torqeedo CEO, Dr. Christoph Ballin.

4:30-8:00 PM

**Registration Opens**

GROUND FLOOR FOYER

5:00-6:15 PM

**Old Europe Revisited: Views From the Sidelines**

NYMPHENBURG I-II

The call for action throughout this event is about 'thinking different', about how cleantech innovation can help Europe achieve economic growth and progress (vorsprung), and work off its debt mountain. About some 'crazy guy' spirit and thinking the unthinkable. Our opening evening begins by giving the floor to a US and an Asian entrepreneur, to provide their perspectives from outside of the direction of two old industries, both important to Germany and Europe. One is the chemical/materials industry, the other the automotive.

Eben Bayer will provide his view on some of the industrial implications of making the shift from plastic omnipresence to fungal ubiquity in the materials we produce and use. Albert Lam will provide his perspective on the development of the global EV market and its implications for Europeans.

Our third and closing speaker of the evening will provide his investor viewpoints on the ongoing and hugely significant geopolitical and macro-economic shifts, impacting all investment theses and corporate strategies. Jochen Wermuth will focus on Russia – and the opportunities and challenges it represents, and why his asset management firm has launched an international cleantech fund, looking to invest in non-Russian clean technology companies with a strong match to Russia.

*Moderator:* **Sheeraz Haji**, CEO, Cleantech Group

*Speakers:* **Eben Bayer**, CEO & Co-Founder, Ecovative Design

**Albert Lam**, CEO, Detroit EV

**Jochen Wermuth**, CIO & Founding Partner, Wermuth Asset Management

6:15-8:00 PM

**Opening Reception**

GROUND FLOOR FOYER

Cleantech Forum attendees are invited to attend a special networking reception to bring together our international delegates with the Munich cleantech community in an informal, relaxed environment.

*Hosted by:* **Veolia Environnement**

## Tuesday, April 17th

7:30-6:00 PM

**Registration**

GROUND FLOOR FOYER

8:00-9:00 AM

**Breakfast Roundtable Discussions**

SCHWABING I-III

Digest the latest in international cleantech. Join a breakfast table hosted by select international guests and/or someone from Cleantech Group. Check the final list of table hosts and subjects, which will be posted in the room on the day, but to whet the appetite, the following hosts and subjects have been confirmed. Come join table discussions on: biomaterials; the latest, hot off the press, cleantech investment quarter; the M&A environment for European companies; cleantech in Russia; cleantech in Poland and other EU CEE countries; cleantech in China; corporate cleantech innovation sourcing: strategies and best practices; and the state of global cleantech innovation (from the co-author of the Global Cleantech 100 and the first cleantech innovation index of countries).

*Table Hosts:* **Richard Cave-Bigley**, Associate, Cleantech Group

**Adam de Sola Pool**, CEO, European Investment Partners II

**Vince Knowles**, Senior Analyst, Cleantech Group

**Greg Neichin**, Executive Vice President, Cleantech Group

**Pascal Siegwart**, Partner, Aster Capital

**Sara Strobe**, Vice President, Cleantech Group

**Eric Wang**, Managing Partner, GRC Sino Green

**Jochen Wermuth**, CIO & Founding Partner, Wermuth Asset Management

# CONFERENCE BY DAY

## TUESDAY CONTINUED

9:15-9:45 AM

### Cleantech Group: Welcome and Keynote

NYMPHENBURG I-II

Cleantech Group will set the stage with its analysis of the state of cleantech in April 2012, both in Europe and beyond, to contextualize what follows.

*Speakers:* **Sheeraz Haji**, CEO, Cleantech Group  
**Richard Youngman**, Managing Director, Europe & Asia Cleantech Group

9:45-11:00 AM

### New Times Requires New Thinking. Time to Think About the World Differently

NYMPHENBURG I-II

The call for action throughout this event is about 'thinking different', about how European companies need to re-engineer and re-invent themselves to achieve economic growth and progress (vorsprung), and work off its debt mountain. About how they could take advantage of key mega-trends such as Urbanization and Partnerships. This morning, leaders in industry and innovation, from a variety of backgrounds, provide views on the future of Europe (and beyond), and where they see opportunity (in capital-constrained times). In renewables, resource efficiency, mobility and the grid. In the intersections of technology areas and industrial areas.

Dr Grenz will kick off our 'new times' session with thoughts from Veolia on the opportunity set, as they see it, in how we model, plan and manage the evolution of territories (land spaces, in which cities are a part but not the whole) – in integrated ways. The focus will be on the creation of sustainable and financeable plans for regional development, involving all the stakeholders and open to innovation (from younger companies).

Pedro Miranda, head of Siemens One and leading Siemens' competence centre on sustainable cities, will provide his perspective on how the rules of global business have changed from the 2000's. How, because of rapid urbanization, and the need for sustainable economic development, there is need for innovation from companies, large and small, in how they interface with global customers and markets.

Dr W. Charlton (Chuck) Adams, on the board of the IEEE, will provide his perspective on what entrepreneurs and investors need to understand about the smart grid to benefit from the new market and service opportunities which will open up. The opportunity is enormous but very complex. Some opportunities will come to market much faster than others and some will require greater capital investments and longer investment cycles than others. Standards will be a critical enabler.

*Moderator:* **Richard Youngman**, Managing Director Europe & Asia, Cleantech Group  
*Speakers:* **Dr. Thorsten Grenz**, CEO, Veolia Environmental Services Germany  
**Pedro Miranda**, Corporate Vice President, Siemens AG  
**Dr. W. Charlton Adams Jr.**, Board Member, IEEE

11:00-11:45 AM

### Networking Break

LOWER LEVEL FOYER

During this break, the CEOs of Eight19 and NovaTorque, Simon Bransfield-Garth and Emily Liggett respectively, invite you to come by their exhibition tables to meet the companies and hear their investment propositions. Each CEO will be available to give an informal, hustings-style talk at 11:20 am, as appropriate.

*Hosted by:* **Eight19** and **NovaTorque**

11:45-12:45 PM

### Unlocking Capital in a Capital-Scarce World: The 2012 Outlook

NYMPHENBURG I-II

Straight-talking perspectives from leading investors in cleantech venture and private equity. Discover why capital is so tight for growing young companies, and what the prospects are of that changing. Hear the perspectives of leading Limited Partners – where they see potential to invest; where they will not and why. Hear the General Partner perspective – from one fund who successfully closed a second, albeit a much later-stage, cleantech fund during 2011 and another who is midway through the fundraising process. The views provided will draw upon the wider views collected from the European LP and GP Advisory Group meetings from the previous day.

*Moderator:* **Warren Pimm**, Partner, Sustainable Development Capital LLP  
*Speakers:* **Alois Flatz**, Partner, Zouk Capital LLP  
**Patric Gresko**, Principal, European Investment Fund  
**Jack Levy**, Co-Founder & Partner, Israel Cleantech Ventures  
**Dr. Ingo Marten**, Head of European Clean Technologies, Macquarie Group

### Sustainable Mobility: It's Not Just About the Vehicle!

NYMPHENBURG III

2011 saw the setup of two significant funds dedicated to smart mobility solutions: BMW iVentures, and Ecomobilité Ventures, a collaborative effort between SNCF, Orange, PSA Peugeot Citroën and Total. Other companies such as GDF Suez and Mercedes-Benz have also recently dedicated resources to thinking more about smart mobility innovation beyond cleaner vehicles and vehicle components. This session will provide insider viewpoints on the significance of smart mobility services as an emerging innovation and investment theme, as well as what that means for top-tier clean vehicle and component innovators, such as Punch Powertrain.

*Moderator:* **Dr. Jos Peeters**, Managing Partner, Capricorn Venture Partners NV  
*Speakers:* **Olivier Bordelanne**, Senior Project Manager, GDF SUEZ  
**Dominique Clarac**, CEO, Nodbox  
**Thorsten Mattig**, Head of Business Development Mobility Services, BMW AG  
**Elias van Wijk**, R&D Director, Punch Powertrain NV, Belgium

*Hosted by:* **Capricorn Venture Partners** and **GDF Suez**

## CONFERENCE BY DAY

## TUESDAY CONTINUED

12:45-2:15 PM

## Networking Lunch

SCHWABING I-III AND LOWER LEVEL FOYER

Network with peers while enjoying lunch.

2:15-3:15 PM

Fueling the Alternative  
Vehicle Fueling Ecosystem

NYMPHENBURG I-II

This session will examine how innovations are driving an emerging alternative vehicle fueling industry, particularly with respect to hydrogen and biofuels. The panel will discuss the market “drivers” (excuse the pun) as well as provide the audience with visions and practical viewpoints on existing deployments, existing go to market strategies, challenges, and the potential that these solutions have in changing the face of our transportation infrastructure over the next five-ten years.

**Moderator:** **Greg Neichin**, Executive Vice President, Cleantech Group

**Speakers:** **Dr. Juergen Friedrich**, Manager at Fuel Cell & Battery Drive Development, Daimler AG  
**Dr. Hans Kistenmacher**, Innovation Management, Linde Group  
**Dr. Andreas Opfermann**, Head of Clean Energy and Innovation Management, Linde Group  
**Gijs van Breda Vriesman**, Commercial Manager Europe, Shell Alternative Energy

**Hosted by:** Linde Group

Entrepreneur Showcase:  
Early-Stage Companies

NYMPHENBURG III

Five competitively selected CEOs from across the full cleantech spectrum present and pitch their investment opportunities. Most of the companies in this session are seeking a Series A venture round.

**Moderator:** **Erwin Burth**, Head of Cleantech Partner Program Europe, Autodesk

**Speakers:** **Anderson Knopp**, Manager, Bidatek  
**Rolf Ljunggren**, CEO, Cortus  
**Anil Raj**, CEO, Omnigrd Micropower Company  
**Sandra Sassow**, CEO, SEaB Energy  
**Gorka Retolaza Gavina**, General Manager, HBiO

**Expert Reviewers:**  
**Astorre Modena**, General Partner, Terra Venture Partners  
**Jamie Vollbracht**, Head of New Ventures, Innovation, Carbon Trust

**Hosted by:** Autodesk

3:15-4:15 PM

Balancing Security &  
Accessibility: Emerging Smart Grid Data Challenges

NYMPHENBURG I-II

The combination of monitoring, networking, and control technologies are opening up significant, new opportunities across the smart grid ecosystem. Utilities are gaining direct real-time visibility into not only smart meters, but intelligent transmission and distribution equipment that can help them optimize performance and reliability. The numerous benefits associated with this new tide of data come, however, with the hidden cost of increased security vulnerability.

Utilities of the future must ensure that customer and operational data is both secure and accessible to new analytics and control applications. Utility managers must coordinate with various third parties – renewable energy suppliers, demand response aggregators, field service partners – while taking ultimate accountability for servicing end customers in a safe and secure manner. Various global equipment vendors, as well as upstart venture-backed companies, are working hard to support utilities with this challenge and bringing innovative solutions to market. This session will explore how to balance the indispensable need for security with the promise of emerging smart grid applications.

**Moderator:** **Greg Neichin**, Executive Vice President, Cleantech Group

**Speakers:** **Stephan Gerhager**, Former Information Security Officer, E.ON Energie AG  
**Detlef Pohl**, Managing Partner, Siemens Venture Capital GmbH  
**Ingo Schoenberg**, CEO & Co-Founder, Power Plus Communications AG

**Hosted by:** Siemens Venture Capital

Entrepreneur Showcase:  
Mid-Stage Companies

NYMPHENBURG III

Five competitively selected CEOs from across the full cleantech spectrum present and pitch their investment opportunities. Most of the companies in this session are seeking a Series B venture round.

**Moderator:** **Erwin Burth**, Head of Cleantech Partner Program Europe, Autodesk

**Speakers:** **Ronald Rich**, CEO, Atmosphere Recovery  
**Antoine Millioud**, Chairman, NEP Solar  
**Dominique Surinx**, General Manager, Borit  
**Nicholas Gill**, Corporate Director, Aeristech  
**Maura Rosenfeld**, VP, Business Development, Advanced Mem-Tech

**Expert Reviewers:**  
**Nicholas Atkins**, Partner, Georgieff Capital  
**Cédric Latessa**, Investment Manager, Aster Capital

**Hosted by:** Autodesk

4:15-5:00 PM

## Networking Break

LOWER LEVEL FOYER

During this break, the CEOs of Eight19 and NovaTorque, Simon Bransfield-Garth and Emily Liggett respectively, invite you to come by their exhibition tables to meet the companies and hear their investment propositions. Each CEO will be available to give an informal, hustings-style talk at 4:40 pm, as appropriate.

**Hosted by:** Eight19 and NovaTorque

# CONFERENCE BY DAY

## TUESDAY CONTINUED

5:00-6:00 PM

### Invented in Europe. Financed and Deployed Outside. Thinking Differently About Capital-raising

**NYMPHENBURG I-II**

This session examines the shifts both in where end markets are for environmental products and in where available capital resides. This is distinct from where the more advanced technology is. There are an increasing number of funds in growing economies as different as Brazil, China, India, the Middle East and Russia that are looking to provide the bridge to bring lower-tech, proven technology from elsewhere to address their local and urgent needs, often with a different business model and price point to localize it.

'Technology transfer' to growth markets is a key mega-trend European cleantech companies need to embrace. The assembled panel, composed of two Shanghai-based fund managers and two European-based ones, with strong Asian ties, will discuss this theme, with its focus mostly on China, as a case study of this bigger trend.

*Moderator:* **Dr. Christoph von Einem**, *Partner, White & Case*

*Speakers:* **Nicolas Chaudron**, *Partner, Idinvest Partners*  
**Stephen Edkins**, *Managing Partner & Co-founder, Diverso*  
**Jean-Pascal Tranié**, *General Partner and co-founder, Aloe Private Equity*  
**Eric Wang**, *Partner, GRC Sino Green*

*Hosted by:* **White & Case**

### Entrepreneur Showcase: Growth-Stage Companies

**NYMPHENBURG III**

Five competitively selected CEOs from across the full cleantech spectrum present and pitch their investment opportunities. Most of the companies in this session are seeking a C venture round.

*Moderator:* **Erwin Burth**, *Head of Cleantech Partner Program Europe, Autodesk*

*Speakers:* **Ziv Gottesfeld**, *CEO, CellEra*  
**Stephan Mey**, *CEO, Agnion Technologies*  
**Alistair Higgins**, *CEO, PhotoSolar*  
**James McDougall**, *CEO, ReVolt Technology*  
**Frank Magnotti**, *CEO, Fluitec*

*Expert Reviewers:*

**Henrik Olsén**, *Managing Partner, Environmental Technologies Fund*

**Stéphane Villecroze**, *Partner, Demeter Partners*

*Hosted by:* **Autodesk**

6:30-10:00 PM

### A Special Treat: Offsite Reception and Dinner at the Residenz

**MAX JOSEPH SAAL, MUNICH RESIDENZ**

Cleantech Forum attendees are invited to relax and enjoy themselves at a combination networking reception and strolling dinner (a 'flying buffet' as our hosts would call it) following the day's activities. This will take place in the Munich Residenz (Münchner Residenz), the former Royal Palace of the Bavarian Monarchs in Munich's city center. Buses will be provided from 6:15 pm, to take Forum attendees to the venue. Forum badges will be required for entry. The last bus is scheduled to leave the Sofitel Hotel at 7:00 pm.

*Hosted by:* **Taylor Wessing and The Bavarian Ministry of Economic Affairs, Infrastructure, Transport and Technology**

## Wednesday, April 18th

8:00-4:00 PM

### Registration

**GROUND FLOOR FOYER**

8:00-9:00 AM

### Breakfast

**SCHWABING I-III**

During breakfast, representatives from the VC units of Gamesa and Iberdrola invite companies and investors to the Innobasque exhibition space to discuss with them over coffee about what start-up companies they are looking for and why.

9:00-10:00 AM

### Think Differently about Mature Industries: Wind Services

**NYMPHENBURG I-II**

A soon to be released report into the European wind industry argues that the wind services business is set for a new wave of development and that the industry is likely to see new company formation. Opportunity exists for private equity to participate in the strong growth prospects in this segment of the maturing wind industry. Deloitte and Taylor Wessing will present highlights from their study and moderate a panel discussion, that will look to take in the perspectives of OEMs, independent service providers, investors and wind park operators.

*Moderator:* **Carsten Bartholl**, *Partner & Head of Renewable Energy, Taylor Wessing*

*Speakers:* **David Krueger**, *Partner & Germany Cleantech Leader, Deloitte*  
**Javier Barcena**, *Head of Origination, Analysis and Activation, Gamesa*

*Hosted by:* **Deloitte and Taylor Wessing**

(The additional speakers were not confirmed before the print deadline. Please refer to the event app or the online agenda for details)

## CONFERENCE BY DAY

## WEDNESDAY CONTINUED

10:00-11:00 AM

**Cleantech in Southern Europe: NYPHENBURG I-II  
The Reinvention of an Industrialized Hub**

A cleantech hub is emerging in Southern Europe with a committed pool of capital, industry, and a history of engineering and reinvention. Several initiatives, R&D centres, and venture capital funds have recently emerged with a clear focus on further developing the Southern Europe cleantech ecosystem. The session will hear from how and why corporates and research units from the Basque Country are engaging with the cleantech innovation paradigm in the fields of clean and efficient energy, sustainable mobility, and eco-design of equipment.

**Moderator:** **Leire Bilbao**, *Business Innovation Director*, Innobasque

**Speakers:** **Javier Barcena**, *Head of Origination, Analysis and Activation*, Gamesa

**Eduardo Beltrán de Nanclares**, *Innovation & Technology Director*, Mondragon

**Diego Díaz Pilas**, *Head of Disruptive Initiatives*, Iberdrola SA

**Raquel Pinan**, *Internationalization Manager*, Automotive Intelligent Center (AIC)

**Borja Zarraga**, *Power & Environment Manager*, SENER

**Hosted by:** Innobasque

11:00-11:45 AM

**Networking Break**

LOWER LEVEL FOYER

During this break, Innobasque welcomes you to their exhibition booth area to experience some of the finest food from the Basque Country. Michelin star chef, Josean Alija will speak about the creative, eco-innovative processes used in his kitchen based in the Guggenheim Museum Bilbao and bring a couple of dishes to illustrate how environmentalism has influenced the cuisine.

11:45-12:45 PM

**Cool Finlandia: A Showcase of Finnish Cleantech Companies NYPHENBURG I-II**

This session introduces four innovative cleantech companies from Finland, in search of future capital and strategic partners. The Cool Finlandia session will also demonstrate the new SOLVED expert service – aiming to be the world's leading cleantech community. SOLVED presents at the moment more than 100 Finnish cleantech experts ready to discuss and answer cleantech related questions. Cleantech Finland also invites you to join them for pre-lunch drinks at the Finnish stand after the session.

**Moderator:** **Santtu Hulkkonen**, *Executive Director*, Cleantech Finland

**Speakers:** **Kimmo Irpola**, *CEO*, AkkuSer

**Alex Michine**, *CEO*, MetGen

**Kaj Ronnlund**, *CEO*, There Corporation

**Tomi Ristimäki**, *Manager, Sales and Marketing*, Visedo

**Hosted by:** Cleantech Finland

**New Energies, New Times NYPHENBURG III  
Different Thinking Required for a Smarter Grid**

Germany's energy mix is set to change radically in the coming years, with nuclear phased out and renewables scaled up. To meet the demands of recent legislation and the requirements being specified by the regulator, the German grid will go through significant change. From what we can see in Q1 2012, the German grid is showing the exciting potential of achieving real 'vorsprung' in the race to a real 'smart grid', as it plans to achieve real-time communication, and lay the conditions to enable true integration – between the meters at users' sites and the grid operators, and between all forms of energy (electricity, gas and heat). The challenges and opportunities inherent in the vision are large in equal measure, and are worthy of all our attention. Whilst grids elsewhere won't develop in exactly the same ways, nevertheless we could all learn from studying what Germany is planning and how it executes. This session will examine the emerging picture of the future German grid, exploring the opportunities that will present themselves for both innovation and investment, and the challenges to be overcome.

**Moderator:** **Dr. Peter Bachmann**, *Partner*, Noerr

**Speakers:** **Dr. Thomas Becks**, *Head of Technology and Innovation*, VDE

**Bruno Derungs**, *Partner*, Climate Change Capital Private Equity

**Dr. Frank Pawlitschek**, *Managing Director*, Ubitricity

**Oliver Stahl**, *CEO*, Entelios

**Hosted by:** Noerr

# CONFERENCE BY DAY

## WEDNESDAY CONTINUED

12:45-2:00 PM

### Networking Lunch

SCHWABING I-III AND LOWER LEVEL FOYER

Network with peers while enjoying lunch.

2:00-3:00 PM

### Commercializing Lighting Innovation: A Spotlight on Routes to Market

NYMPHENBURG I-II

Innovation in lighting presents the opportunity for great energy efficiency gains, across residential and a range of commercial markets. The global cost for lighting exceeds \$230 billion and is the single largest item on the public energy bill for many cities and communities. However LEDs are on a downward cost journey, just as PV cells have been, and the market is dominated by a small number of large incumbents. These factors present clear challenges to companies developing new lighting technologies and limit options in reaching the large market that is potentially accessible.

This session explores the different routes to market for innovation companies in lighting. It will explore the different lighting applications, value chain positions and approaches to partnership that bring success to companies in the sector.

**Moderator:** Robert Schrimppf, German Partner, Novusmodus

**Speakers:** Nati Freiberg, CEO, BEEMTech

Liam Kelly, CEO, Nualight

François Xavier Oliveau, COO, Lucibel

Stephan Schulz, CEO, Dilitronics

**Hosted by:** Novusmodus

### From Recourse to Non-Recourse: Charting a Path to Bankability for Newer Technologies

NYMPHENBURG III

The scarcity of bank debt generally and the difficulty in raising non-recourse finance for building asset-intensive businesses, based on technologies without 'bankable' track records, are part of the harsh reality for growth companies operating today in certain areas of clean technology. Figuring out ways forward will be among the key factors in separating out the winners.

This very practical session will draw out lessons learned from specific experiences. The panel will look at case studies of companies to break down the different risks and the possible solutions. Trying to get from A to B in one move is utopian. A path needs to be charted – and paths do exist. Finding them requires patience and ingenuity and contacts in non-traditional homes for project risk.

The panel consists of a CFO with deep experience in dealing with a number of such situations, an equity investor who has lived this journey with a portfolio company and the CEO of a biomass company who is in the eye of this particular storm – right now.

**Moderator:** Richard Youngman, Managing Director Europe & Asia, Cleantech Group

**Speakers:** Edmee Kelsey, Former CFO, Main Street Power

Stephan Mey, CEO, Agnion Technologies

Bill Weil, Chief Investment Officer, Ludgate Environmental

3:00-4:00 PM

### Re-Thinking the Opportunity Set for German and European Solar Companies

NYMPHENBURG I-II

Germany and Europe may be where it all began, but times change. Cleantech Group has invited a panel to come with their different perspectives and their different experiences with European solar companies, to close the event with some provocative perspectives on 'what next' and 'where next'? Where do they see the opportunities for European solar companies, and why? In which global markets? In which parts of the value chain do opportunities remain? What and where to avoid?

**Moderator:** Kevin Reed, Head of Advisory Services, Cleantech Group

**Speakers:** Simon Bransfield-Garth, CEO, Eight19

Michael Heck, Former VP Marketing & Sales, DEGERenergie

Dr. Markus Hehn, Head of Green Tech Services, Deloitte Tax & Consulting S.a r.l.

Frank Siebke, Former Director, Good Energies

4:00-4:15 PM

### Closing Remarks

NYMPHENBURG I-II

A brief recap of key takeaways from the conference as the Forum concludes.