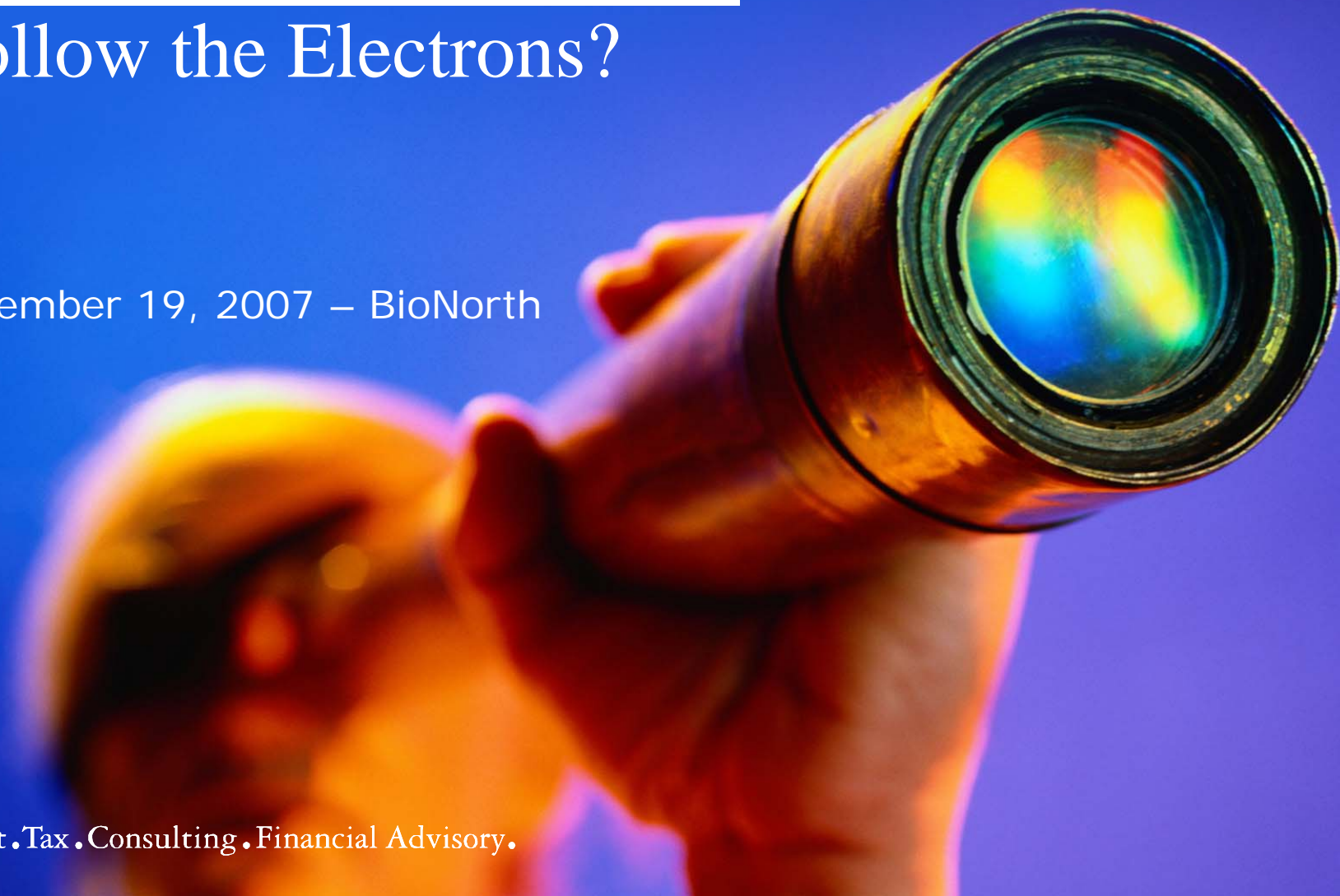


Deloitte.

Green Tech Trends: Follow the Electrons?

November 19, 2007 – BioNorth

Audit . Tax . Consulting . Financial Advisory .



The Death of Old Tech?

- Telecom guidance is for 0-5% (at best) in growing economy
- SIA growth for 2007 of 3.6%
- Enterprise license growth of ~5% is good these days
- Severe ASP pressure across the board...especially in PC ecosystem
- Dinosaurs don't move fast – these are 30 year old technologies

CleanTech/GreenTech

- GreenTech is proprietary intellectual property having to do with:
 - Fire (Energy), Earth, Water, Air
 - “free as the air, spend like water, cheap like dirt”
 - Economic value of energy is highest
- **Especially anything to do with Energy!**

The Greening of Tech - Fire

"I've said it before and I'll say it again, it's all about power; power generation, power transmission, power storage and power consumption. The most useful form of power in our modern electronic world is electricity, it can drive technologies that move us, assist us, inform us and ultimately protect us. With such a bright future for electricity shouldn't we be laser focused on finding better ways to generate it?"

Randy Mears, EDS Fellow

VCS pour \$1.74B into cleantech in Q3

By David Ehrlich -- Published October 25, 2007 - 8:09am

- Ann Arbor, Mich.-based Cleantech Network said today that venture capitalists handed out \$1.74 billion in the third quarter in North America and Europe.
- The research group said that's a **13 percent increase** over the same period in 2006.
- "**North American VC investments hit a new high of \$1.26 billion**, representing a 50 percent increase over the previous quarter and a 36 percent increase over Q3 2006.
- Venture capitalists in Europe invested \$472 million, up 206% over the second quarter, but down 13 percent from the same period last year.
- **Energy Generation led the pack at \$1.2 billion invested in Q3, with solar and biofuel taking in the most cash within that segment.**
- "While investments in energy generation remain strong, we're encouraged to see increasing interest in water and transportation technologies as pressures on fresh water supply and concern over CO2 emissions continues," said Parker.
- Water and wastewater financing increased 146 percent over the second quarter on both continents.
- The report also pointed out **a new record for cleantech in Canada**, with the country investing \$109 million in Q3, 85 percent higher than the entire first half of 2007.

The Greening of Tech - Energy

- Generation
- Transmission/Distribution
- Storage
- Consumption
- Metering
- Load Balancing

The Greening of Tech - Earth

- Cleaning up polluted soil (PCBs, etc)
- Cleaner mining techniques
- Reducing landfill needs (plasma)

The Greening of Tech - Air

- Reduce pollution and/or greenhouse gases
- GHG debate
- Lifecycle analysis
- Transportation –
- Telecommuting – is it green?

The Greening of Tech - Water

- Clean up dirty water
- Use less water (smart meters)
- Run of River generation
- Global scarcity of water due to global warming (hotter, drier, desertification, loss of glaciers)

Deloitte. Technology Green15

- 6NSilicon Inc.
- Azure Dynamics Inc.
- Distech Controls, Inc.
- EnviroTower
- GEEP Inc.
- Optimal Technologies
- Plutonic Power Corporation
- QuestAIR Technologies Inc.
- REGEN Energy Inc.
- Sempa Power Systems Ltd.
- Smartcool Systems Inc.
- Sustainable Energy
- VRB Power Systems Inc.
- Westport Innovations Inc.
- Xantrex Technology Inc.

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