



Hyderabad, Oct 2010

“CLEANTECH: END OF THE BUBBLE”

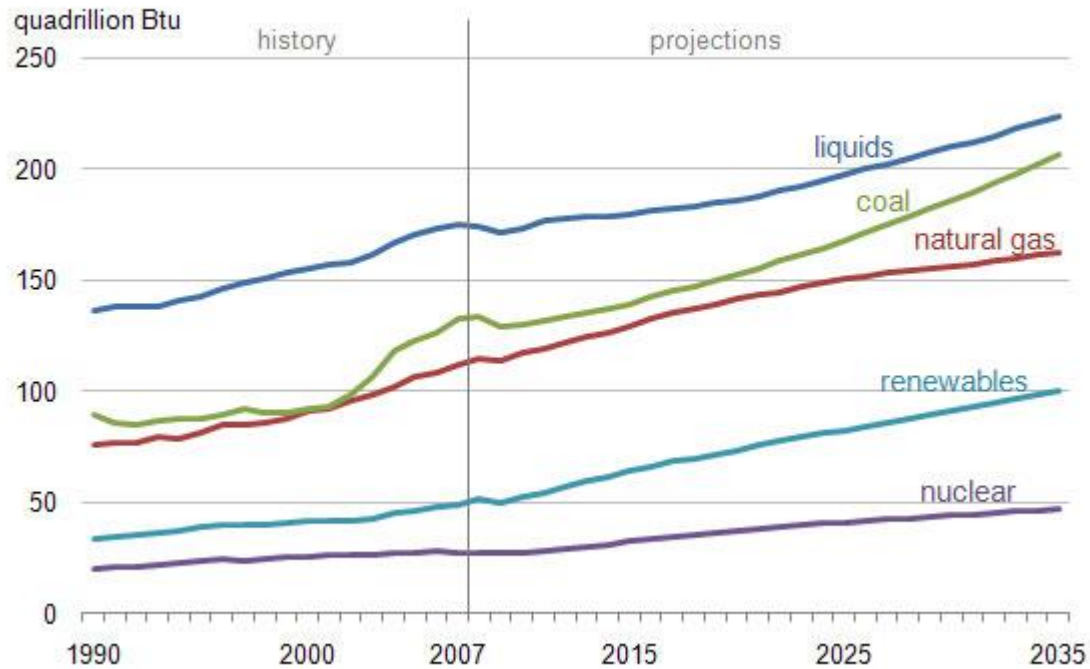
TIE-ISB CONNECT 2010

Satyam@NeoSilica.com



GLOBAL ENERGY USE PROJECTIONS

Figure 2. World marketed energy use by fuel type





“ET” vs. “IT”

- **“Energy Technologies” – ET vs. IT**
 - + ET – all forms of innovations and technologies in the Energy Sector
 - + Water is also an Energy – needs monitoring, management, ..
- **Analogs**
 - + Can't imagine any sector WITHOUT “IT” presence
 - + Energy is ALSO core to ALL – they'll ALSO need “ET”
 - + Observe the Evolution Map of IT over past 20-30 years
 - + ET has JUST STARTED in this Century



KEY OBSERVATIONS OF “ET”

- **Stark Differences ‘ET’ vs. ‘IT’**
 - + **‘ET’ requires in-depth knowledge**
 - **Customers, Legacy Systems, Protocols (evolving), Policy, Major Players**
 - + **‘ET’ is highly Multi-disciplinary**
 - + **Hardware PLUS Software**
 - + **Varying levels of skilled manufacturing**
 - + **More field installations and ongoing services**
- **Perfect opportunity for “ET” Services**
- **HIGH Requirement for MANY PARTNERSHIPS**



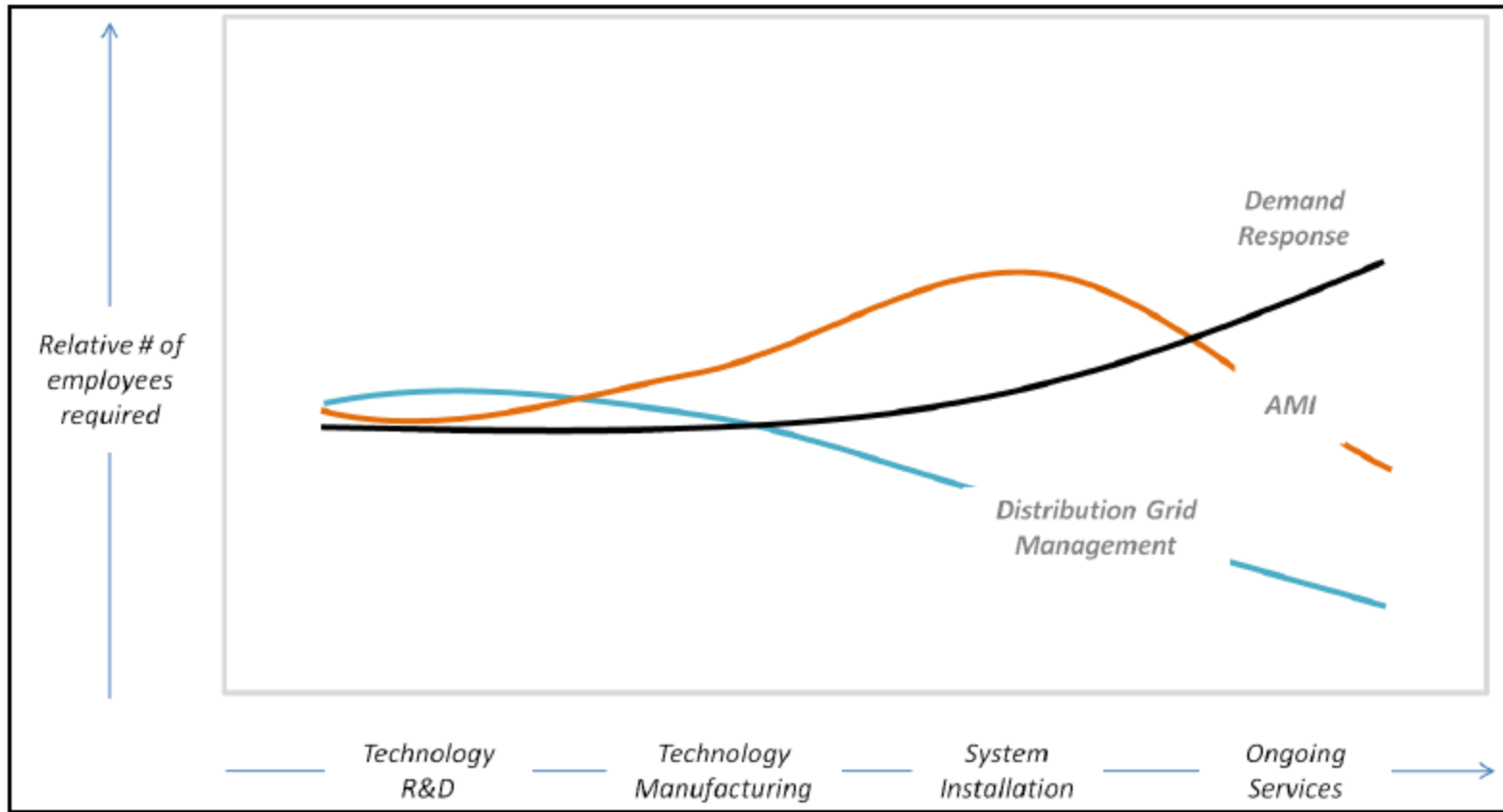
... KEY OBSERVATIONS OF “ET”

- **All major corporations are entering into ‘Energy’ sector**
 - + Cisco likes to provide ‘Energy Management’ in their routers
 - + AT&T likes to bundle ‘Energy Management’ services
 - + Google launched ‘PowerMeter’ for online Energy Lookup
 - + Microsoft has similar service with “HOHM”
 - + Oracle, SAP launched Energy Applications
- **Varied Expertise and many Inventions Required in**
 - Electrical, Mechanical, Electronic, Semiconductors, Nano, Chemical, ...



OBSERVE “ET” SERVICES REQUIREMENT

Relative Job Distribution By Category



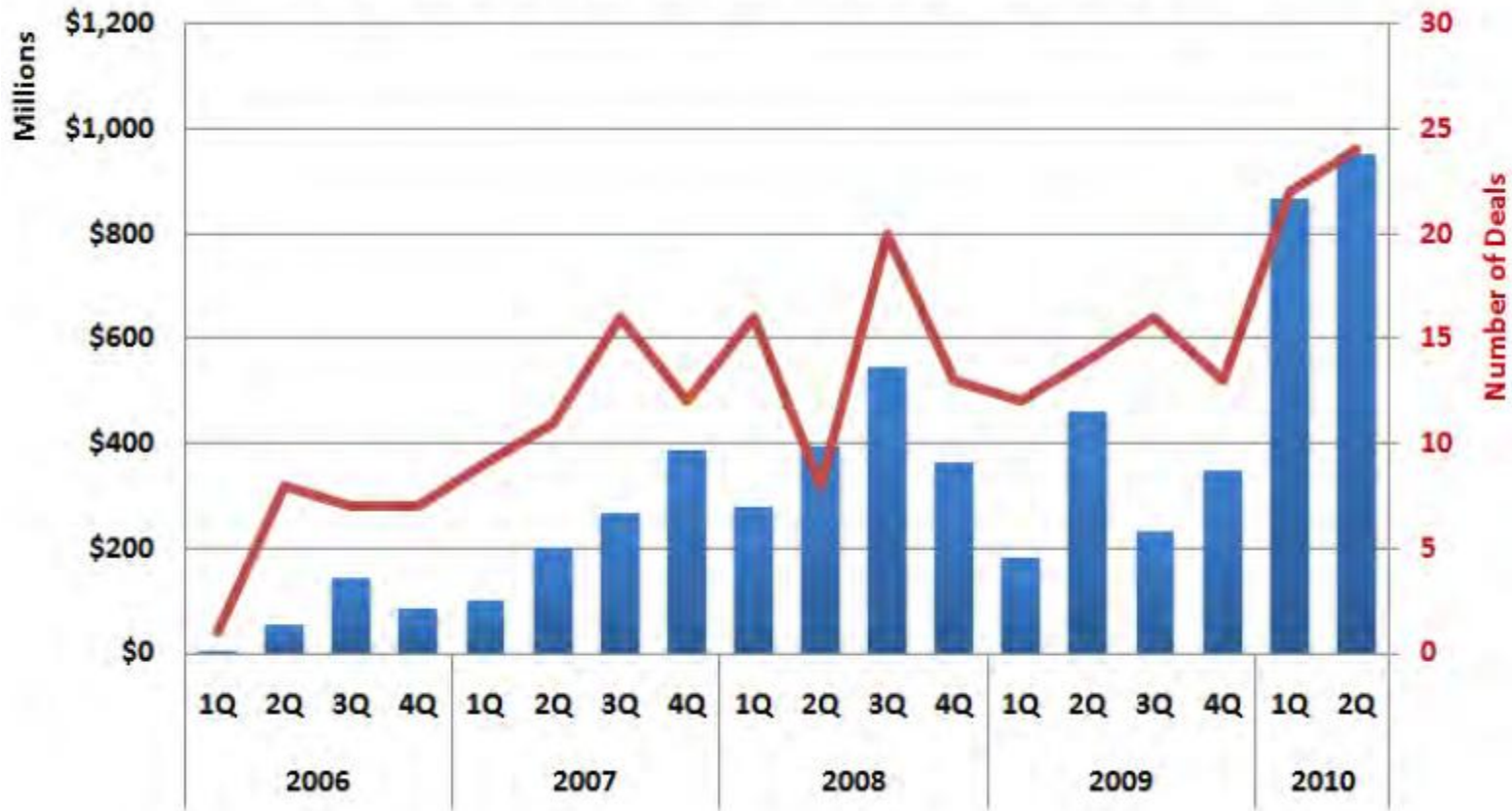
Source: Cleantech Group Analysis



RAISING “VC” INVESTMENT

Does this give a CLUE for ENTREPRENEURS?

VC investment in the Global Cleantech 100





INDIAN SCENARIO

Planning Commission targets to spend (by 2030)

\$2.3 Trillions = 1 Crore Crores

- Energy priorities are:
 1. Improve Energy Efficiency
 2. Change Composition of Energy
- R-APDRP is spending 51,000 crores on AMR, efficiency,
- Renewable Energy Certificates (REC)

In IT – we still talk about Billions!!