Background

CleanTECH San Diego was created in 2007 to:

- Support Job Creation. Advance and diversify the San Diego region’s economic development goals

- Build a Common Agenda. Bring together the region’s diverse clean technology Stakeholders around a common agenda

- Prepare for the New Economy. Help San Diego prepare for and benefit from California’s proactive regulatory policies

- Mission: Accelerate the San Diego region as a world leader in the clean technology economy
Who We Are
Cleantech Macro Market Trends

- 80% of Fortune Global 50 companies are communicating publicly their sustainability management efforts… *Deloitte’s 2012 Study of Actions by Global 50*

- 34 US states impose mandates and/or funded EE requirements… *Bank of America’s 2012 Big Data C3 Overview*

- Energy efficiency market is >$280B in US… *Deutsche Bank-Rockerfeller Foundation*

- 46% of new generation capacity came online in ‘12 from renewables… *Federal Energy Regulatory Commission*

- 2012 global cleantech venture investment totals $6.46B, down 30% over LY with biofuels as leading sector by amount invested. $952MM… *CleanTech Group, 2012*

- California $100 MM charging infrastructure project: largest-ever investment in EV infrastructure with 10,000 hook-ups and 200 fast chargers.

- U.S Navy Secretary Mabus declares 50% of Navy’s energy consumption will come from renewables by 2020.
San Diego’s Cleantech Economy

875+ Cleantech Companies

• Robust, upward trending new company growth

• Over 400 innovator companies and over 450 market enabler companies

• County-wide distribution. Dense formation around universities, research institutes and colleges

• Strong activity in renewable energy, transportation, energy efficiency, energy storage and biofuels
Solar Energy: Leading Adoption, Innovation and Manufacturing

San Diego #1 Solar City
• Highest solar PV adoption rates in the state
• >200 solar companies
• Gov. Schwarzenegger Designates San Diego Solar iHub

Secured $154M in CREBS Allocation
• CleanTECH San Diego led a regional coalition enabling its 18 municipalities to install solar rooftops
• Earning 20% of national allocation

Soitec Selects San Diego for Manufacturer Facility
• Utility Scale Solar CPV Manufacturer
• Opened doors in December 2012

Economic Impact
• 450 direct jobs at the factory
• 1,000 indirect jobs
• Annual production capacity 200 MW
Biofuels: Training the Next-Gen Workforce

San Diego Biofuels Industry
- More than 50 biofuels companies
- Sapphire Energy: 5th largest national VC deal in 2012 at $140MM
- Imperial Valley link

EDGE Initiative
- Workforce training for biofuels industry
- $4MM for workforce development; one of five DOL grant recipients
- 300 trained; 100 placed
Clean Transportation: Trailblazing Toward Emissions-Free Mobility

San Diego’s Clean Transportation Industry
- Small and large companies: charging, metering, storage and fuel choice
- Home to over 40 clean transportation companies

EV Adoption is Here: San Diego is Out Front
- Nearly 2,500 EVs on San Diego streets; 200K by 2020
- ECOtality deploying $220MM DOE grant to install charging stations nationally
- Largest ever investment in EV infrastructure: $100MM NRG settlement to bring 200 fast charging stations to California
Energy Efficiency: Building ARRA Success Stories

San Diego EE Industry
- >50 energy efficiency companies

Street Light Working Group
- Consortium of CleanTECH San Diego, SDG&E and cities in San Diego County;
- 13 cities, 60,000 street light retrofits
- 40% kwh reduction; 20 million kWh annual savings
- $3 million annual taxpayer savings; $30 million over 10 year light life
- $25 million in local economic development/job creation
Smart Grid: Converging Technologies for Sustainable Solutions

Regional Leadership
• SDG&E – proactive advanced meter installations; 20.8% of energy from renewables in 2011
• UC San Diego – microgrid test bed; solar forecasting and grid stability research

New Collaborative: Smart City San Diego
• GE, SDG&E, City of San Diego, UC San Diego and CleanTECH San Diego partnership to:
  • Prepare region for one of largest EV deployments
  • Test key energy efficiency and smart grid solutions
  • Set measureable standard for sustainability
San Diego Innovation Providing Global Leadership

- Nation’s leader with most solar installations
- Hosts the nation’s first all electric car-sharing program through car2go
- Ranks in top 5 cities with the greenest cars – Forbes
- Hosts the nations first Zoo with a Solar to EV Project with 20 solar canopies to charge EVs
- UCSD’s world-renowned microgrid self-generates 95% of its total power consumption
- SDG&E ranks smartest utility - Intelligent IQ Magazine; deploys 2.2 M smart meters
- Camp Pendleton is one of the greenest armed force bases worldwide with its solar project
- California cleantech VC dollars in 2011 exceeded total of all 49 states combined – Clean Edge
Stay Connected

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Group: CleanTECH San Diego
See you next year at the 30th Economic Roundtable!

For today’s presentations, the County of San Diego Fact Sheet, other important information and resources, please visit:

http://www.sdcounty.ca.gov/economicroundtable/

Today’s event will be replayed on the County Television Network. For dates, time, and channels, please visit:

http://countynewscenter.com/video/schedule