



Second Global Demand Conference

Demand dynamics in the major PV markets

Valencia, Spain. **September 2nd | 2008** International solar expert conference

Programme Information

The solar industry is growing at an amazing rate, but where do all the modules go? What are the demand-side dynamics and forecasts of the world's eight major PV markets? Is an oversupply likely in 2008 or 2009 and, if so, what might the implications be?

These and other questions are the topics on the agenda of the interactive conference on Tuesday 2 September in Valencia. Speakers from the world's major PV markets will present their vision of the demand side of the solar market. PV data guru Travis Bradford will offer his overview of the growth in the solar industry, and analysts from Deutsche Bank Securities, McKinsey & Company and an Industry CEO will take an in-depth look at global demand dynamics.

At last year's Global Demand Conference we discussed the question: "Will global demand continue to outpace the rapidly expanding PV industry, or does the PV industry face overcapacity?" This year we will discuss potential strategies and possible price implications for what looks like an unavoidable oversupply situation.



The program includes:

- Industry overview and outlook by PV data analyst Professor Travis Bradford
- Presentations by leading PV experts from Germany, the USA, Japan, Spain, Italy, Greece, and France
- Analysis of the global PV market and industry by Stephen O'Rourke from Deutsche Bank Securities in New York and Peter Lorenz from McKinsey's Houston Office
- Interactive networking lunch
- Presentation and discussion of the PV demand development survey among all participating experts
- Network drink reception



Registration

Anyone who's interested in learning more about the latest developments on global demand for solar can register. The registration fee for participation is €795 (excl. VAT). Early-bird registrations will receive a €100 discount.

Included are:

- Coffee breaks, lunch & cocktails
- Contact details of all participants
- Electronic copy of all presentations

Location

The location of the international solar expert conference on global demand for solar is the luxurious Westin Valencia Hotel. (Amadeo de Saboya, 16, Valencia). This five-star hotel offers first-class hospitality and is one of the most impressive structures in the city.

For room reservations please contact: events.valencia@westin.com (SolarPlaza conference; Second Global demand Conference)



Who should attend?

Business owners, entrepreneurs, marketing managers, financial analysts, investors, consultants and executives interested in developments and forecasts on global demand for solar energy

About SolarPlaza

www.solarplaza.com is the global PV marketplace providing free information and matchmaking services.

Past events of SolarPlaza

SolarPlaza previously organized 13 international PV events. Last year it organized The Global PV Demand Conference in Milan and in June this year it organized The Thin-film Future conference in Munich.

Cancellation Policy

Delegates cancelling before 25 August 2008 will receive a full refund. A 50% refund will be provided for cancellations received after 25 August.



SecondGlobalDemandConference

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Registration Form

Participation:	Cost:
<input type="checkbox"/> Yes, I want to attend this conference: Global PV Demand, 2 September 2008, Valencia	€795
Discounts for Early-bird registrations	
<input type="checkbox"/> €100 discount for registrations before 31 July 2008:	-/-
Discounts for SolarPlaza customers	
<input type="checkbox"/> €50 discount for attendees of a previous SolarPlaza event:	-/-
Your total price (excl. VAT)	

Company:	Company VAT no.:
Contact: Mr/Ms	Position:
Phone:	Email:
Company address:	
Postcode:	City:
Country:	Website:
Payment options (invoice by email): <input type="checkbox"/> Bank transfer: Account holder: SolarPlaza Bank: Triodos Bank Utrechtseweg 60 3700 AB Zeist (The Netherlands) Bank Account No: 21 24 98 428 For international bank transfers please use: IBAN: NL59TRIO0212498428 SWIFT (BIC): TRIONL2U please quote the invoice number and debtor number given on the invoice, which will be sent to you by email	<input type="checkbox"/> I authorise SolarPlaza to charge my credit card: <input type="checkbox"/> Euro/Mastercard <input type="checkbox"/> VISA Card No.: Cardholder: Expiry date: Security code: Signature:
Name:	Date:
(please include your signature!)	

¹ Use one form per person. (For group reservations please contact SolarPlaza.)

There are limited places for this international event.

Disclaimer: SolarPlaza cannot be held responsible for any losses (including financial losses), health problems or damages as a result of participating in this solar energy conference.

An invoice with payment details will be sent to you by email.

Fax this form to: +31 10 2807265

SECOND GLOBAL PV DEMAND CONFERENCE 2008

“WHERE DO ALL THE MODULES GO?”

VALENCIA, 2 SEPTEMBER 2008

- 09:00** **Registration and coffee**
- 09:30** **Opening conference**
Chairman: Edwin Koot (CEO SolarPlaza)
- 09:45** **In perspective: the solar industry growth and global supply dynamics**
Travis Bradford; President Prometheus Institute (author of the book: The Solar Revolution)
- 10:15** **Germany: growth dynamics of the world's largest PV market**
Gerard Stryi-Hipp; Managing Director BSW (German Solar Industry Association)
- 10:40** **Spain: the world's second largest and rapidly growing PV market**
Javier Anta; President ASIF (Spanish Solar Industry Association)
- 11:05** **Coffee break**
- 11:45** **Japan: will Japan pick-up the growth curve again?**
Kaizuka Izumi; Manager, Overseas Division at RTS Corporation
- 12:10** **Greece: Will this country follow Spain with a spectacular growth?**
Stelios Psomas; Executive director HELAPCO (Greek Solar Industry Association)
- 12:35** **Italy: Analysis of the rapidly growing Italian PV market**
Gerardo Montanino; Director of Operations Department at GSE (Gestore Servizi Elettrici), managing the feed-in tariff applications
- 13:00** **Interactive joint business lunch**
- 14:45** **France: the emerging new Mediterranean tiger?**
Richard Loyer; Managing Director at Enerplan (l'association professionnelle de l'énergie solaire), the French Solar Energy Business Association (*invited*)
- 15:10** **USA: Market dynamics of the giant market just awakening ...**
Jigar Shah; Chief Strategy Officer and founder of SunEdison, one of the leading solar PV companies in the USA
- 15:35** **Tea break**
- 16:15** **The Wall Street translation of the Solar PV industry and market outlook**
Stephen O'Rourke; Analyst Deutsche Bank Securities in New York
- 16:45** **The economics of solar power; the growing competitiveness of solar power**
Peter Lorenz; Associate principal in McKinsey's Houston Office
- 17:15** **Presentation of global demand forecast based on survey + interactive debate with key-note speakers**
Travis Bradford, President Prometheus Institute
Stephen O'Rourke, Deutsche Bank Securities
Peter Lorenz, McKinsey
- 18:00** **Closing of event and informal drink**

Speakers

PV data analyst Professor Travis Bradford will present his outlook and elaborate on the industry's growth figures. Stephen O'Rourke from Deutsche Bank in New York will provide an analysis of the global PV market and industry. Other speakers at the conference will be leading PV experts from the world's major PV markets. They will discuss the current situation and forecast the growth in demand over the coming years in their markets.

Travis Bradford

Professor of Renewable Energy at University of Chicago and founder of Prometheus Institute (www.prometheus.org), a leading data analyst in the global PV market

Founded in 2003 by Travis Bradford, a former private equity and hedge fund executive, the Prometheus Institute was created to fill a need for reliable data, quantitative analysis and practical information about the solar energy industry. The Institute strives to be the world's leading source of publicly available primary data on the photovoltaic (PV) supply chain and end-markets through a series of data collection and dissemination projects and the publication of the industry's oldest newsletter, PV News. Travis Bradford is author of the book "the Solar Revolution" and of various in depth PV market and industry reports.



Gerard Stryi-Hipp

Managing Director of the BSW (German Solar Industry Association: www.solarwirtschaft.de)

BSW is the lobby group of the German solar energy industry, with over 600 member companies. As a strong community of companies, the BSW Solar acts as information provider and intermediary between the business, political and public sectors. It represents the common commercial interests of businesses across the solar energy value chain. Germany is still the world's largest PV market.



Javier Anta

President of ASIF, the Asociación de la Industria Solar Fotovoltaica (Spanish Solar Energy Industry Association: www.asif.org)

More than 490 Spanish companies involved in solar PV are currently members of this organisation, which was founded in 1998. Mr Javier Anta is a veteran of the Spanish solar energy market and, as an advisor on behalf of ASIF, is involved in all discussions with the Spanish government about the new feed-in tariff. Spain is currently the world's second-largest PV market.



Jigar Shah

Chief Strategy Officer, SunEdison. Jigar Shah is a founder and board member of SunEdison (www.sunedison.com)

SunEdison delivers solar energy services, not solar equipment, with no upfront costs. Jigar Shah has extensive experience in both the solar PV and wind industries. Before founding SunEdison in 2003, Shah worked in mergers & acquisitions, corporate strategy and sales (specialising in national commercial accounts) for industry giant BP Solar. As well as working for the Department of Energy on alternative vehicle and fuel cell programmes, Shah has worked in an engineering capacity for both AstroPower, the largest publicly traded pure-play PV solar company, and the Atlantic Orient Corporation, a leader in the medium-sized wind turbine market. Shah has a BS in Mechanical Engineering from the University of Illinois, Champaign-Urbana, and an MBA from the Robert H Smith School of Business at the University of Maryland.



Stelios Psomas

Policy Advisor, HELAPCO (Hellenic Association of Photovoltaic Companies) (www.helapco.gr)

Mr. Stelios Psomas is Director of HELAPCO, the Hellenic Association of Photovoltaic Companies. HELAPCO is a non-profit organisation that was set up by representatives of Greek photovoltaic companies in 2002. Mr Psomas is a highly reputed expert in the Greek PV market and industry and one of the initiators and promoters of the feed-in tariff system, which is currently generating enormous interest in new PV applications and power plants in Greece. Mr Psomas is a former executive director of Greenpeace in Greece.



Hiroshi Matsukawa

Dr Hiroshi Matsukawa works for the RTS Corporation (www.rts-pv.com), the leading organisation for consultancy and expertise in the Japanese PV market

Founded in March 1983, RTS has been investigating and studying PV, and acting as an international information exchange, for more than 20 years. RTS studies and analyses technical developments and trends in the PV market. Its customers are Japanese government agencies, leading PV cell/module manufacturers in Japan and overseas, major electric utilities, major silicon companies, companies using PV systems and electric power equipment companies. RTS provides a monthly report containing comprehensive current information on PV activities in Japan, and publishes an annual PV market report on Japan. Dr Matsukawa graduated from Professor Kurokawa's laboratory and has a wide knowledge of PV technology, and the PV market and industry in Japan.



Gerardo Montanino

Director of the Operations Department at GSE s.p.a. (Gestore dei Servizi Elettrici), the organisation managing the feed-in tariff applications for PV systems

The company has the most comprehensive picture of Italian PV market developments, such as feed-in tariff demand in all market segments and forecasts of further market developments. GSE plays a central role in promoting, incentivising and developing renewable energy sources in Italy. The company has a single shareholder: the Ministry of Economy and Finance. Since 2005 GSE has focused on managing, promoting and incentivising renewables in Italy. GSE plays a key role in Green Certificates and issues the Guarantee of Origin and RECS (Renewable Energy Certificate System) certificates.



Stephen O'Rourke

Senior analyst at Deutsche Bank Securities in New York (www.db.com)

As a PV industry expert, Stephen O'Rourke predicts that the solar photovoltaic industry will achieve grid parity — standalone economic viability without incentives — within five years. He believes that the current strong growth in industry capacity will soon lead to an oversupply situation, probably beginning in 2009, when there will be a more than adequate supply of polysilicon. For the long term, he forecasts explosive growth and a potential undersupply situation.