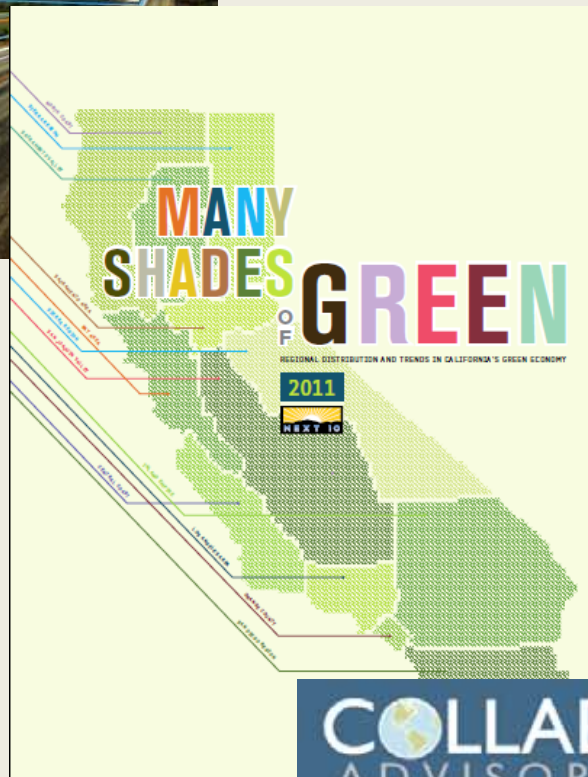


REAL OPPORTUNITY IN CALIFORNIA'S GREEN ECONOMIC DEVELOPMENT

Green California
Summit
April 19, 2011

Presented by
Doug Henton
CEO & Chairman



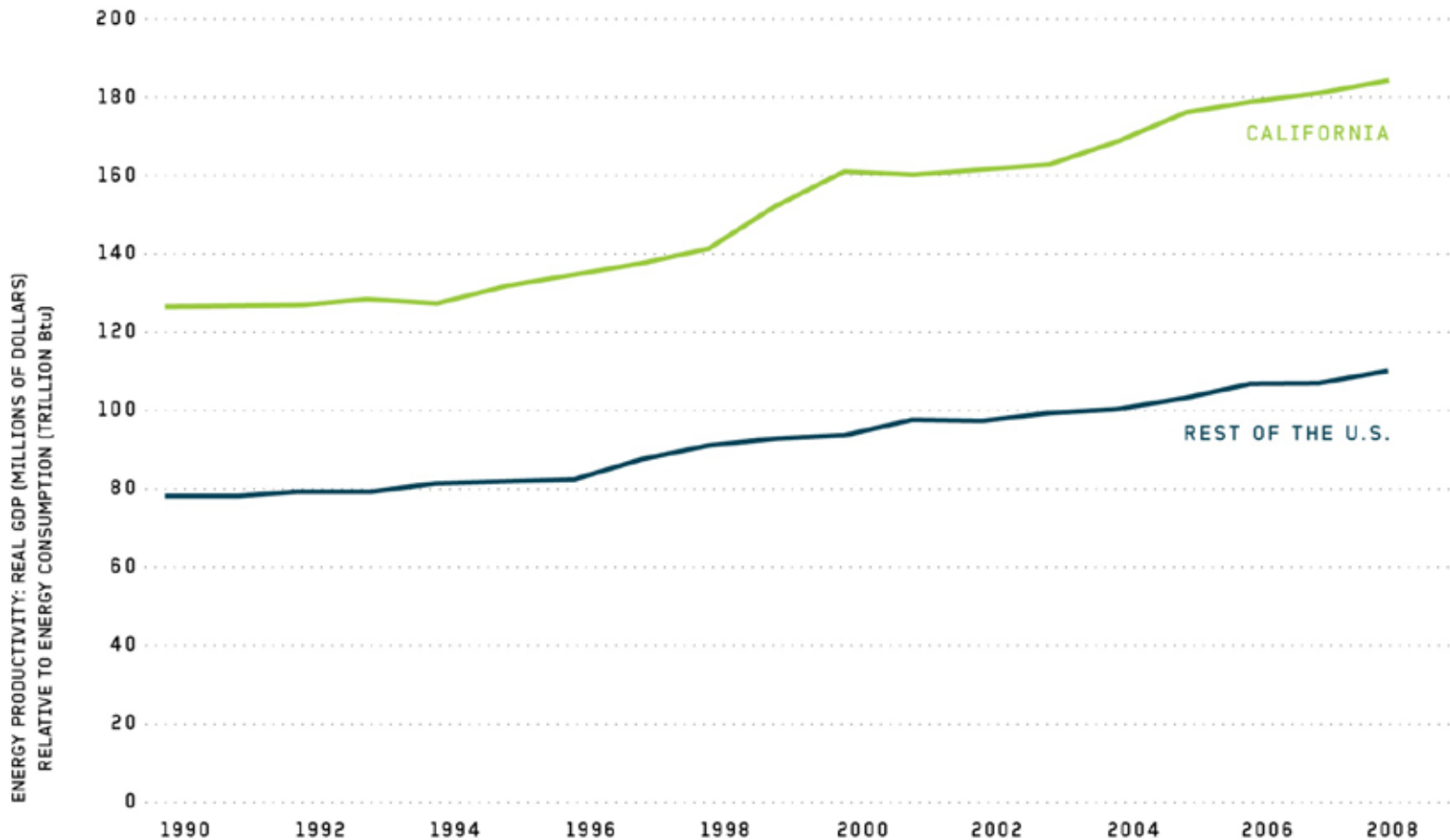
PIONEERING PUBLIC POLICY

- 1947 LA Air Pollution Control District
- 1967 CA Air Resources Board
- 1974 CA Energy Commission
- 1977 Appliance Efficiency Standards (Title 20)
- 1977 New Building Efficiency Standards (Title 24)
- 1982 Utility revenue decoupling
- 2002 CA Renewable Portfolio Standard
Vehicle Emission Standards (AB 1493)
- 2006 CA Global Warming Solutions Act (AB 32)
- 2008 CA Green Building Codes

2010 CALIFORNIA GREEN INNOVATION INDEX

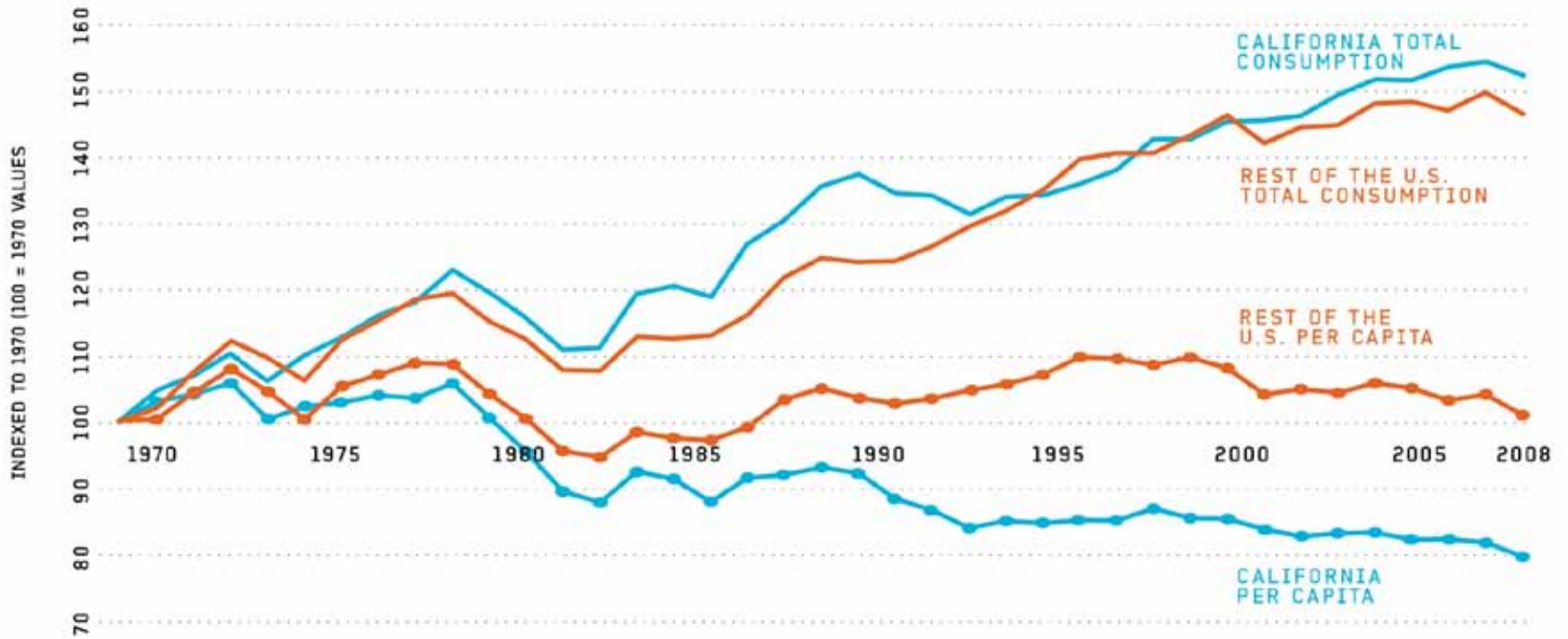
FIG 8. ENERGY PRODUCTIVITY

GDP RELATIVE TO TOTAL ENERGY CONSUMPTION / CALIFORNIA AND THE REST OF THE U.S.



2010 CALIFORNIA GREEN INNOVATION INDEX

FIG 9. TOTAL ENERGY CONSUMPTION RELATIVE TO 1970
TOTAL CONSUMPTION AND PER CAPITA / CALIFORNIA AND THE REST OF THE U.S.

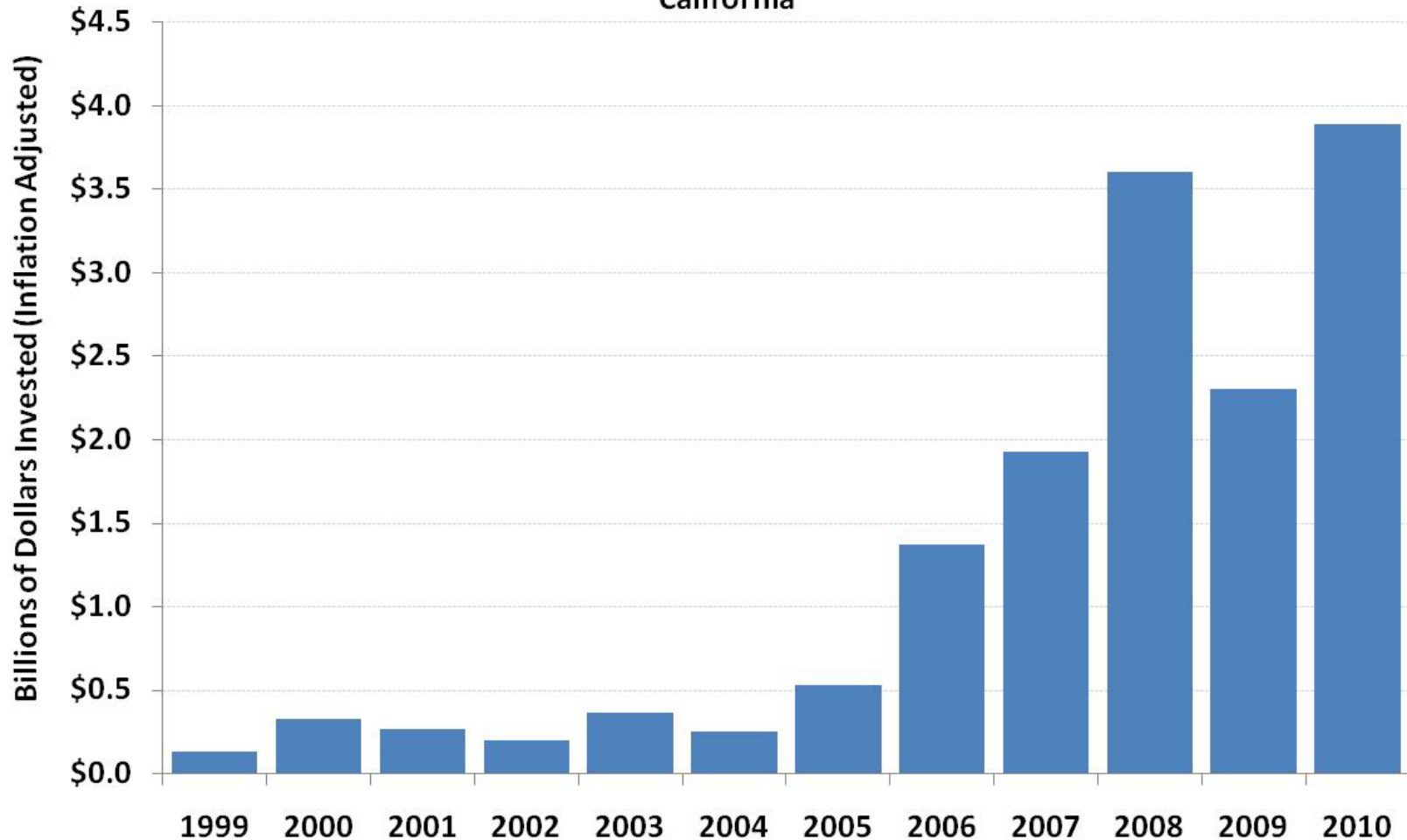


CA IS HUB FOR CLEANTECH INVESTMENT

Venture Capital Investment in Clean Technology

Billions of Dollars

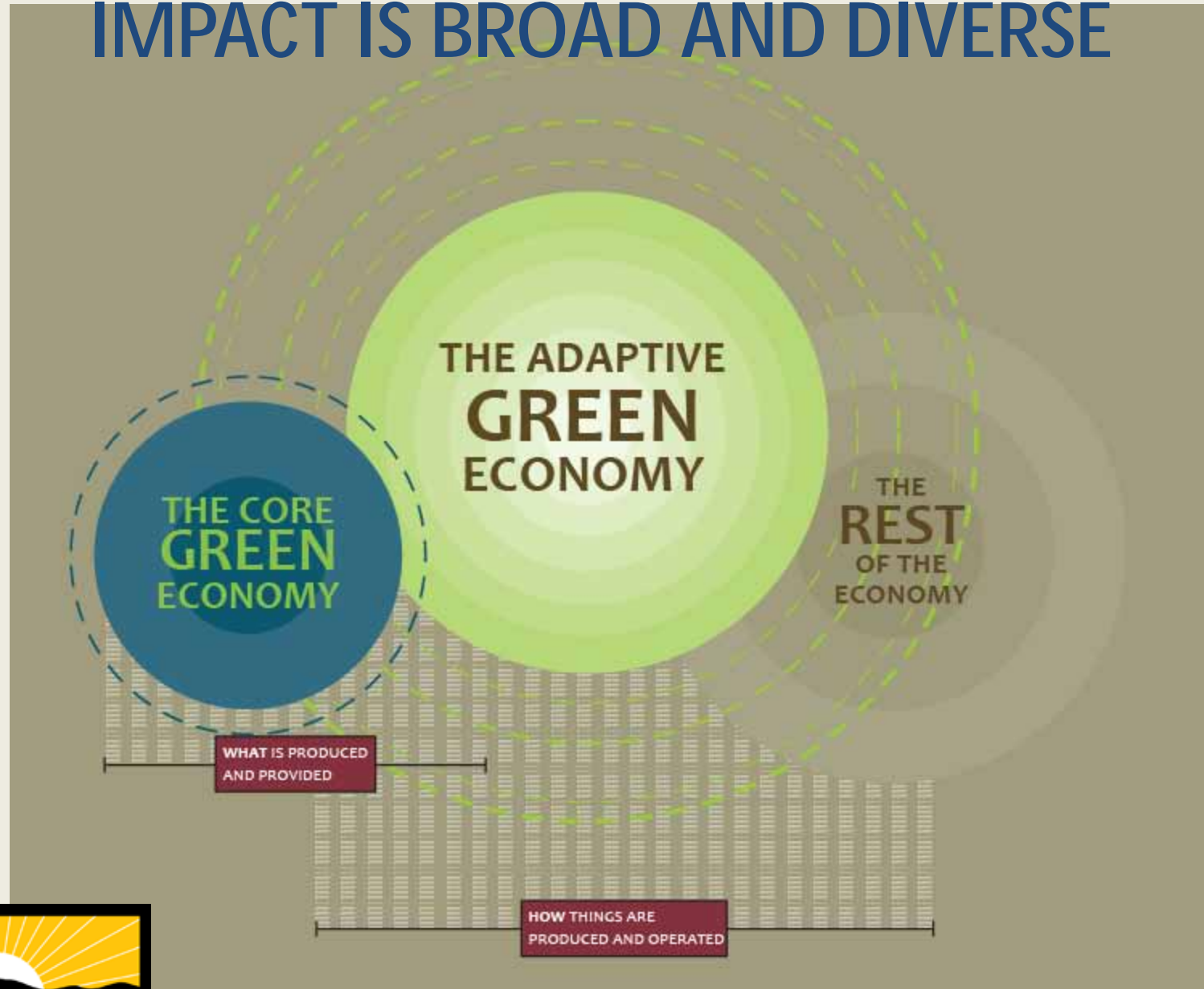
California



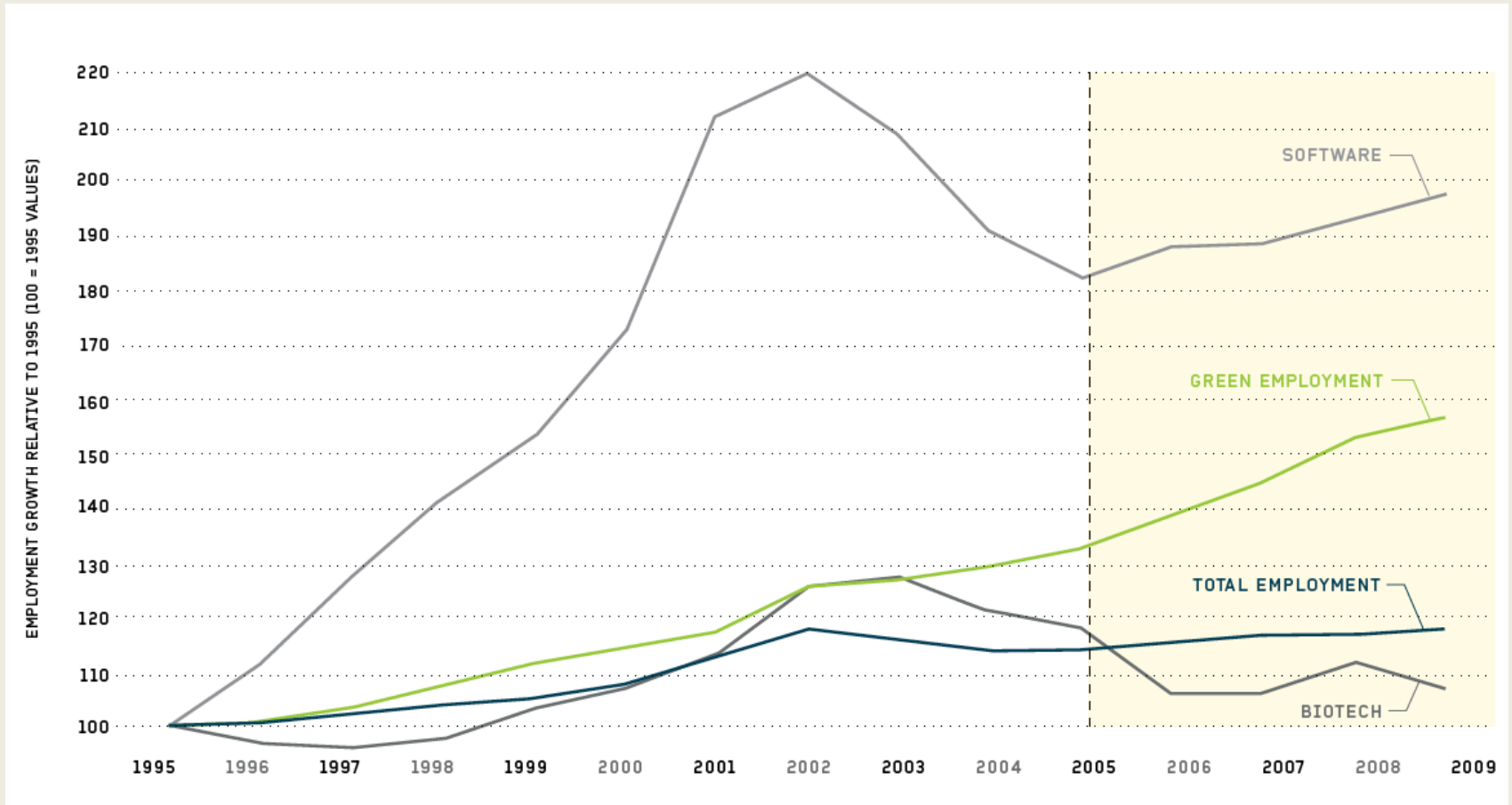
Data Source: Cleantech Group™, LLC (www.cleantech.com)

Analysis: Collaborative Economics

THE ECONOMY IS CHANGING AND THE IMPACT IS BROAD AND DIVERSE



GREEN OUTPACES OVERALL GROWTH

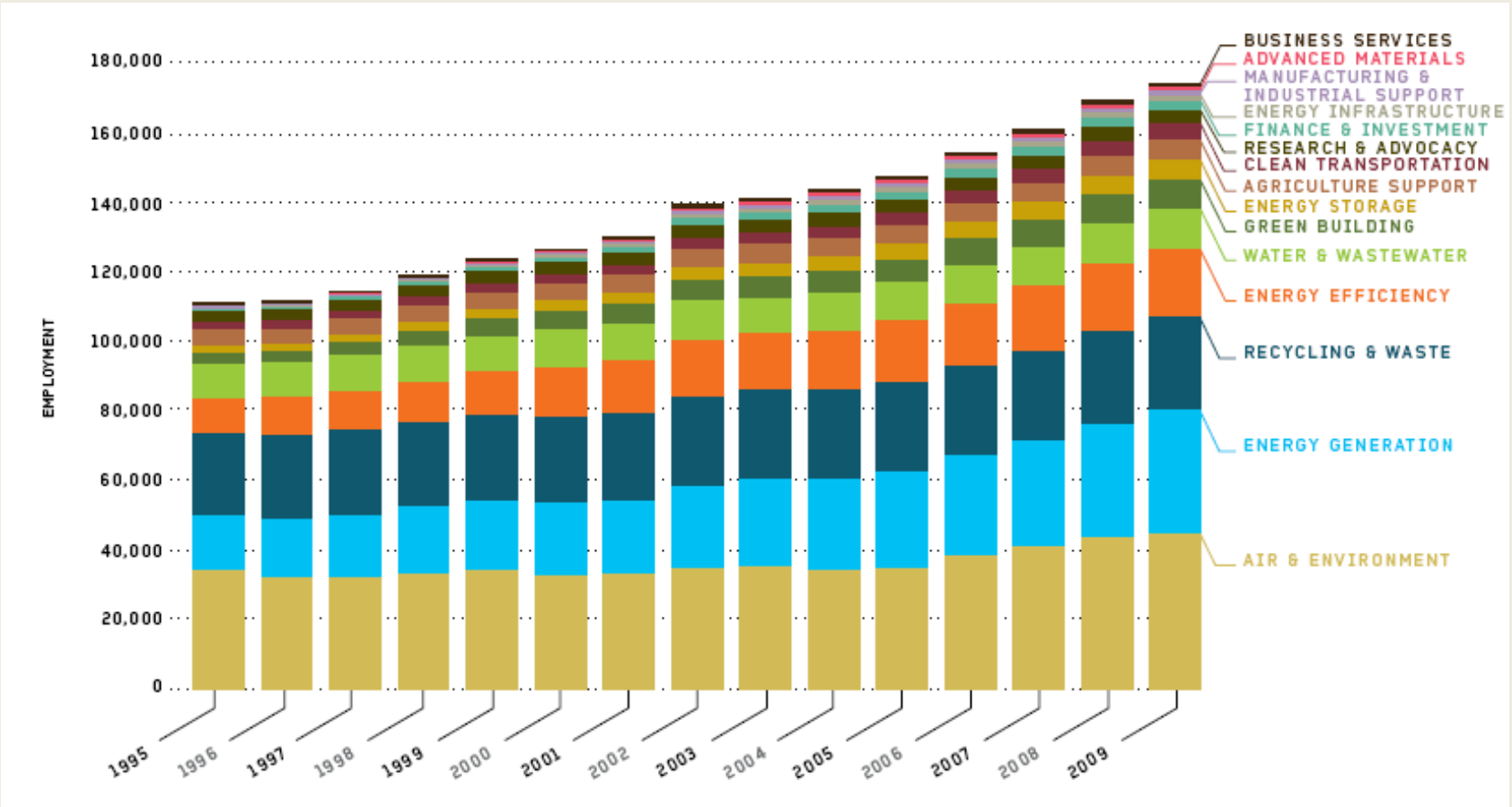


EMPLOYMENT 1995-2009
GREEN +56%
TOTAL +18%

15 SEGMENTS OF THE CORE GREEN ECONOMY

1. Energy Generation
2. Energy Efficiency
3. Transportation
4. Energy Storage
5. Air & Environment
6. Recycling & Waste
7. Water & Wastewater
8. Agriculture Support
9. Research & Advocacy
10. Business Services
11. Finance & Investment
12. Advanced Materials
13. Green Building
14. Manufacturing & Industrial Support
15. Energy Infrastructure

GROWTH VARIES BY SEGMENT & REGION



EMPLOYMENT 2008-2009
ENERGY STORAGE +11%
ENERGY GENERATION +8%

CORE GREEN ECONOMY BY REGION

