

Agenda Investor Days Lisbon

Finance and Innovation in Sustainable Energy in Europe

November 2-3, 2016

VdA – Vieira de Almeida Associados – Sociedade de Advogados, SP RL

Av. Duarte Pacheco 26, 1070-110 Lisbon, Portugal

Investor Days is an interactive event that aims to develop a **community** of ESCOs and financiers dedicated to making energy efficiency the **new normal** across Europe.

The November 2nd workshop will provide a forum in which investors and contractors can learn from each other in order to foster future cooperation and investment. The day will feature players such as APESE, Âmago, Resilient Energy, Creara, SONINGEO, RdA - Climate Solutions, APPII, SI Capital, European Energy Efficiency Fund (EEEF), Grow Advisory, Joule Assets Europe, SUSI Partners, Vieira de Almeida, and more. The main focus of discussion will concentrate on the gap between viable project development, customer uptake and requirements for successful finance.

The agenda will allow ample opportunity for interactive exchange between project owners and investors with a focus on discussion and problem solving. The day will end with drinks and tapas for participants.

November 3rd will concentrate on informal group discussion on topics such as

- Project optimization opportunities across Europe
- Project valuation elements
- Project standardization processes
- Insurance criteria
- Customer acquisition
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Attendees will have the opportunity to test the SEAF IT Platform and brainstorm on its development during breakout sessions.

Speakers List

Wednesday, November 2nd 2016

Jorge Rodrigues de Almeida, CEO, RdA Climate Solutions; National Director ICP Europe
Vanda Cascão, Partner, Vieira de Almeida & Associados – Sociedade de Advogados, SP RL
Mike Gordon, CEO, Joule Assets Inc.
Jessica Stromback, Chair, Joule Assets Europe; Chair, Smart Energy Demand Coalition
Antonio Ciccarelli, CEO, Servizi Energia Ambiente
Jorge Araújo, CEO, SMARTWATT; President, APESE Association
João Raposo, CEO, Âmago Energia Inteligente
Daniel Silva, Electrotecnic Engineer, Amago Energia Ambiente
Sousa Duarte, Energy Director, Pestana Hotel Group
Marc Rechter, Co-founder and board member, Resilient Energy
Paolo Sonvilla, Senior Manager, Creara Energy Experts
Rui Faria, CEO, Energia Técnica
Mattia De Vecchi, CEO, Innowatio SpA
Hugo Santos Ferreira, Secretary General, APII
Bernardo Matos, Managing Partner, Grow Advisory
Tiago Almeida, Head of Project Finance, Banco BPI
Sebastian Waldburg, Founding Partner, SI Capital
Ruperto Unzué, CEO, SUMA Capital
Inigo Prior, Investment Advisor, EEEF
Alexander Rothlin, Director, SUSI Energy Efficiency AG
Paul Cullum, Product Development Manager, HSB Engineering Ltd

Thursday, November 3rd 2016

Jessica Stromback, Chair, Joule Assets Europe, Chair Smart Energy Demand Coalition
Rafael Gil, General Manager, SONINGEO
Rui Barroso, Executive Director, ADRAL; ICT Manager, CIMAC
Michael Pachlatko, Head of Operations, Joule Assets Europe
Stefan Dunjic, Research and Business Development Analyst, Joule Assets Europe
Dave Worthington, Managing Director, Verco
Paul Cullum, Product Development Manager, HSB Engineering Insurance Ltd
Andreas Symeonidis, Assistant Professor, Aristotle University of Thessaloniki
Kyriakos Chatzidimitrou, Software Architect, Aristotle University of Thessaloniki

Agenda Investor Days Lisbon

Wednesday, November 2nd, 2016

- 09:30** **Registration and networking**
- 10:00** **Welcome address**, Jorge Rodrigues de Almeida, CEO, RdA Climate Solutions;
National Director, ICP Europe
- 10:10** **Investing in Energy Efficiency in Portugal: the Legal Framework**, Vanda
Cascão, Partner, Vieira de Almeida & Associados – Sociedade de Advogados,
SP RL
- 10:20** **Growing the Energy Efficiency Financing Market in Europe**, Jessica
Stromback, Chair, Joule Assets Europe; Antonio Ciccarelli, CEO, Servizi Energia
Ambiente
- 10:45** **The Portuguese ESCO Market** - Jorge Araújo, CEO, SMARTWATT, President
APESE Association
- 11:00** **Coffee**
- 11:30** **Project Owner Panel: The challenge of market uptake, real life business
models**
- Jorge Araújo, CEO, SMARTWATT, President APESE Association
 - Daniel Silva, Electrotecnic Engineer, Amago Energia Ambiente
 - Sousa Duarte, Energy Director, Pestana Hotel Group
 - Marc Rechter, Co-founder and board member, Resilient Energy
 - Paolo Sonvilla, Senior Manager, Creara Energy Experts
 - Rui Faria, CEO, Energia Técnica
 - Mattia De Vecchi, CEO, Innowatio SpA
 - Antonio Ciccarelli, CEO, Servizi Energia Ambiente

13:00 **Lunch – Dom Pedro Palace Hotel Lisboa**
Av. Eng. Duarte Pacheco 24, 1070-109, Lisbon

14:30 **Investor Panel: Key criteria for successful Energy Efficiency projects**

- Hugo Santos Ferreira, APII
- Bernardo Matos, Grow Advisory
- Tiago Almeida, Head of Project Finance, Banco BPI
- Sebastian Waldburg, Founding Partner, SI Capital
- Ruperto Unzué, CEO, SUMA Capital
- Inigo Prior, Investment Advisor, EEEF
- Alexander Rothlin, Director, SUSI Energy Efficiency AG
- Jessica Stromback, Chair, Joule Europe

16:30 **Coffee**

17:00 **Valuation, Standardization, Insurance – lowering barriers to finance**, Jessica Stromback, Chair, Joule Europe

17:15 **The building blocks of Energy Efficiency Finance and the experience of the ICP Project**, Jorge Rodrigues de Almeida, CEO, RdA Climate Solutions; National Director, ICP Europe

17:30 **Developments in Insurance and Risk Assessment for Energy Efficiency**, Paul Cullum, Product Development Manager, HSB Engineering Insurance Ltd

17:45 **Wrap up of discussion and main conclusions of the day**, Mike Gordon, CEO, Joule Assets Europe

18:00 **Networking Drink – Dom Pedro Palace Hotel Lisboa**
Av. Eng. Duarte Pacheco 24, 1070-109, Lisbon

Interactive Discussion and Platform Testing

Thursday, November 3rd, 2016

- 9:30** **Welcome and Key Messages from Day 1**, Jessica Stromback, Chair, Joule Assets Europe
- 9:45** **Project Owner and Developer Case Study: Alentejo Central Intermunicipal Energy Efficiency Project Funded by EEEF (CIMAC – Comunidade Intermunicipal do Alentejo Central) on ICP Certification: Project Owner and Developer Insights**
- Rafael Gil, General Manager, SONINGEO
 - Rui Barroso, Executive Director, ADRAL; ICT Manager, CIMAC
- 10:15** **SEAF - ICP Standardized Project Implementation Module**, Dave Worthington, Managing Director, Verco
- 10:30** **SEAF - Data Capture for the Insurance Solution Module**, Paul Cullum, Product Development Manager, HSB Engineering Insurance Ltd.
- 10:45** **Developing the SEAF Platform: SEAF Contractor and Investor Use Cases**, Michael Pachlatko, Head of Operations, and Stefan Dunjic, Research and Business Development Analyst, Joule Assets Europe
- 11:00** **Coffee**
- 11:50** **Discussion Sessions**
- Business models: What makes a successful ESCO?
 - Where are the real risk areas for investors in project development?
How to mitigate risk without killing the project
- 13:00** **Conclusions of discussions, feedback and wrap up**, Jessica Stromback, Chair, Joule Assets Europe

Directions from Vieira de Almeida to Dom Pedro Hotel for Lunch and Drinks



- Head south on R. Prof. Sousa da Câmara toward R. Prof. Sousa da Câmara
- Turn left toward Av. Eng. Duarte Pacheco
- Turn left onto Av. Eng. Duarte Pacheco
- **Dom Pedro Palace Hotel, Lisboa, Avenida Engenheiro Duarte Pacheco 24**
1070-109 Lisboa, Portugal