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Investors Insights on *Hydrogen & Alternative Fuels*

26 January, 15:00 – 16:30 CET

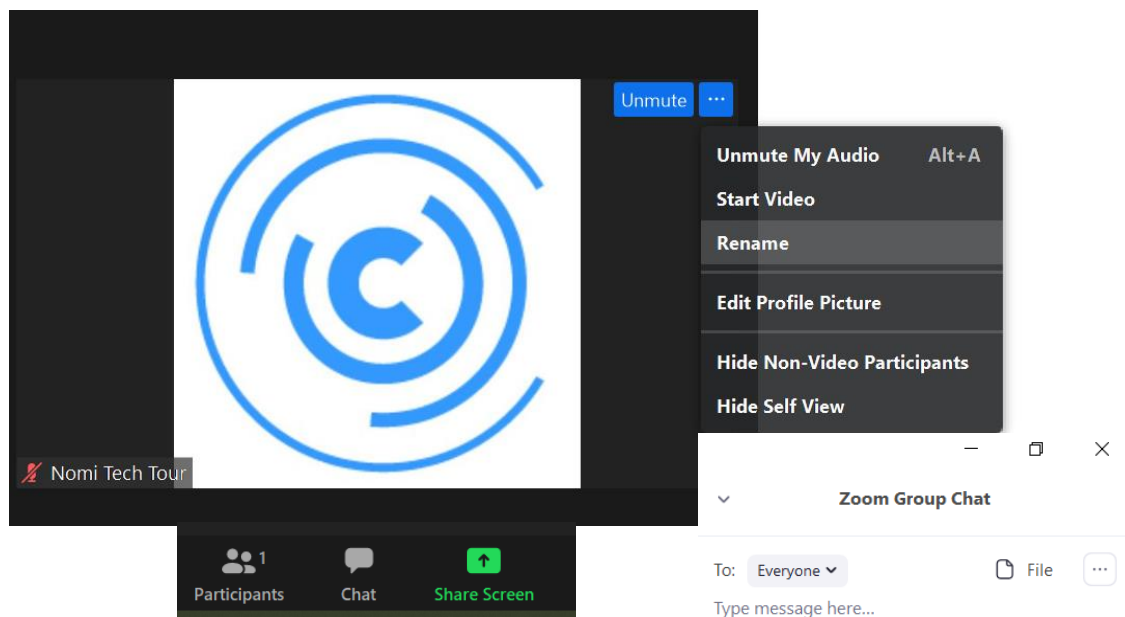
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Radostina Tsenova
Tech Tour Investors Club Lead
Facilitator



Aleksandra Angelova
Senior Project Manager,
leading Tech Tour Energy in Transition Programme
Support



- **Recording** the call
- **Rename yourself with** Name, Surname, Company
- **Turn on your camera** all the time
- **Turn off your microphone** – active only when invited
- **Chat functionality** – use it actively to ask in writing your Questions
- **Useful key combinations** you can use:
Alt + A for Mute/Unmute
Alt + H for opening the Chat

7 min

WELCOME – *by Radostina Tsenova and Leadership Team**Remy de Tonnac, ETF Partners, IVC Council Member – Chair of Tech Tour Investors Club (IVC)**Jasper Geselschaap, Innovation Quarter & ENERGIQ, Hosting Partner*

27 min

PART ONE: Topic Discussion with Speakers

- Main Speaker: **Thierry Lepercq**, President, Soladvent
- Government/Port's Hydrogen Strategy Speakers: **Randolf Weterings**, Port of Rotterdam and **Fred van Beuningen**, Chrysalix Ventures
- Corporate Speaker: **Nicholas Lawson**, BP

12 min

Discussion with the Speakers

16 min

PART TWO: Investor Presenters:

- **Robert Gallenberger**, btov Partners
- **Christina Karapataki**, Breakthrough Energy Ventures

6 min

PART THREE: Pitches

- **Elevator pitches** of [Selected Presenting Companies](#) in Hydrogen & Alternative Fuels tech track, part of Tech Tour Energy in Transition 2020 Programme

15 min

PART FOUR: Networking in breakout rooms:

- Breakout Room 1: “Building the investment eco-system” – hosted with a short presentation by **Christian Weinberger**, EC and **Pedro Guedes De Campos**, FCH JU
- Breakout Room 2: “Spotting the right investment opportunities” – hosted with a short presentation by **Jay Marathe**, Bryan, Garnier & Co
- Breakout Room 3: “Building hydrogen partnerships for scale” – hosted by **Andrew Hinkly**, AP Ventures

3 min

Next Steps

Total: 90 min



Welcome

Remy de Tonnac,

Chair of Tech Tour Investors Club (IVC),
ETF Partners





Welcome

Jasper Geselschaap,

Innovation Quarter & ENERRGIQ,
Hosting Partner, VP Selection Panel





Moderator

Andrew Hinkly,

**AP Ventures,
Head of SP Hydrogen & Alternative Fuels**



AP Ventures
ADVANCE & PIONEER



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Poll 1: Setting up the stage



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Part One: Topic Discussions

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Keynote Speaker

Thierry Lepercq,

President, Soladvent





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Poll 2: Speaker's Question



Randolf Weterings

Port of Rotterdam



Fred van Beuningen

Chrysalix Venture Capital

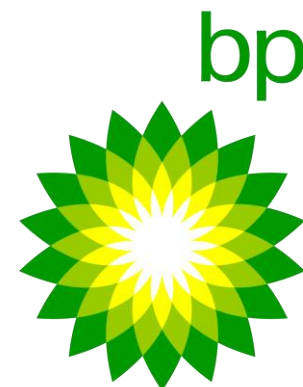




Corporate Speaker

Nicholas Lawson

BP





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Discussion with the Speakers

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Moderator
Andrew Hinkly,

AP Ventures,
Head of SP Hydrogen &
Alternative Fuels



Thierry Lepercq,

Soladvent



Randolf Weterings

Port of Rotterdam



Fred van Beuningen

Chrysalix Venture Capital



Nicholas Lawson

BP





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Part Two – Investor Presenters

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Investor Presentation

Robert Gallenberger

btov Partners





An early stage perspective on hydrogen-related investments

bto v Industrial Technologies Fund



We see a very significant wave of political will & public support programs shaping up



Examples:

- EU Hydrogen Strategy
(<https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0301&from=EN>)
- German Hydrogen Strategy
(https://www.bmwi.de/Redaktion/EN/Publikationen/Energie/the-national-hydrogen-strategy.pdf?__blob=publicationFile&v=6)
- Bavarian Hydrogen Strategy
(<https://h2.bayern/en/bavarian-hydrogen-strategy/>)

Industry involved in “pilot” projects of new orders of magnitude, up to 100’s MW



Examples:

- H2giga
(Thyssen-Krupp, Siemens, Linde/ITM-Power, MAN/HTEC, Sunfire, Schaeffler, Evonik, Shell)
- 100+ MW in Hamburg Moorburg
(Shell Mitsubishi, Vattenfall)
- Up to 250MW in project „H2 Global“
(ThyssenKrupp, Siemens, BASF, Bayer,...)

For us still an open question where to invest on the value chain



Examples:

- Upstream
(High Temp. Electrolysis, AEM, ...)
- Midstream
(LOHC, MOF, ...)
- Downstream
(fuel cells, hydrogen turbines, alternative fuels, ...)

Looking for sufficient technological edge but short time to market to catch the current wave



Examples:

- Innovative components
(mostly material innovation?)
- New production processes
(helping to scale production to larger volumes, drive down cost curves)
- Pick and shovel business
(flow simulation SW?, virtual PP SW?)

**b
to
v**

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Investor Presentation

Christina Karapataki

Breakthrough Energy Ventures





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Part Three – Elevator Pitches

Elevator Pitches: Selected Companies from Energy in Transition 2020 Programme



DIVIGAS

Andre Lorenceau
DiviGas (Singapore)



Christopher Brandon
EH Group Engineering (Switzerland)



HOELLER
THE STACK COMPANY

Matthias Kramer
Hoeller Electrolyzer GmbH (Germany)



Benjamin Britton
Ionomr (Canada)



SKYRE

Trent Molter
SKYRE, INC. (United States)



Joe Beach
Starfire Energy (United States)



Michael LEVY
Vice President
STOR-H Technologies SA (Switzerland)



Aleksandr Smotritskiy
CEO
Visesoila UAB (Lithuania)



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Part Four – Parallel Networking Breakouts

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Breakout Room 1: “Building the investment eco-system”, hosted by:



Christian Weinberger

European Commission



European Commission



Pedro Guedes de Campos

FCH JU



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Breakout Room 2: “Spotting the right investment opportunities”, hosted by:



Jay Marathe

Bryan, Garnier & Co



BRYAN, GARNIER & CO

Breakout Room 3: “Building hydrogen partnerships for scale”, hosted by:



Andrew Hinkly

AP Ventures



APVentures
ADVANCE & PIONEER

Breakout Room 1: “Building the investment eco-system” – hosted by
Christian Weinberger, EC and Pedro Guedes De Campos, FCH JU

Breakout Room 2: “Spotting the right investment opportunities” – hosted by
Jay Marathe, Bryan, Garnier & Co

Breakout Room 3: “Building hydrogen partnerships for scale” – hosted by
Andrew Hinkly, AP Ventures



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Poll 3: Instant Feedback



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What is next?



Future21 Event Details

24, 25, 26 March 2021, PM CET



join the path of European tech leaders

discover

Europe's 500 best growth enterprises and scale-ups, investors, corporations, clusters & advisors

share

the ambition of Europe's tech leaders and discuss investment partnerships

grow

your opportunities with scouting, insights, meetings and peer recognition

meet Europe's 500+ leading Teams

250 selected entrepreneurs

- growth 50 (G50)
- growth (series A+, B)
- scale-ups (Series A)
(best of Tech Tour 2020)

100 investors

- partners
- directors
- analysts

100+ corporations

- innovation
- venturing
- business

50+ clusters

- regional
- tech sectors
- topical

25+ advisors

- transactions
- strategic
- legal & talent

500+ organisations with their **Team of 5**
= [1 Presenter + 1 Expert + 1 Participant] + 2 Friends [investor + corporation]

500+
Presenters

500+
Experts

1,000+
Participants

1,000+
Friends

= **3,000+**
Participants



the collaborative network of
**entrepreneurs
& investors**

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Investors Club Membership

techtour.com/investorsclub

An investor-only Community of Venture Capital, Corporate and Government investors facilitating co-investment and funding relationships, run by Tech Tour.

Independent VC Fund Managers



Corporate Investors



Institutional & Government

**Chair of the Council****Remy de Tonnac**Managing Partner
ETF Partners**Carl Gressum**European Open
Innovation Team Lead
Samsung**Sarah Fisher**Director Global Market
External Innovation
Johnson & Johnson**Osman Kent**Venture Partner
Atlantic Bridge**Nico Goulet**Managing Partner
**Adara Venture
Partners****Petri Laine**Managing Partner
Innovestor Ventures**Maurizio Petitbon**General Partner
Kreos Capital



**Quality
Selection**



**Insightful
Strategies**



**Trusted
Meetings**



**Valuable
Recognition**



**Passionate
Service**

*Across **Regions, Sectors, Tracks & Stages***

Online

Intelligence

on tech companies,
investors & partners
*enhances investments,
valuations and returns*

Insights

and benchmarks with/ of
peer strategies
*reduce risks and save losses
and time*

Meetings

with, and intros active
(Co-)Investors & Partners
*builds trust and leads to
solid deals and partnerships*

Honours

Earned with peers across
the Community across
regions
*builds brand visibility and
partnership leads*

Service & Network

Across the eco-system with
personalised service, *saves
time, costs, travel and
frustrations and allows
fun.* 😊

+ Onsite Meetings [when safe]



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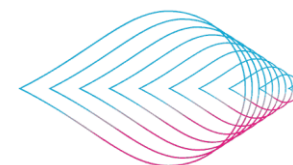
Closing Remarks



Closing Remarks

Andrew Hinkly

AP Ventures



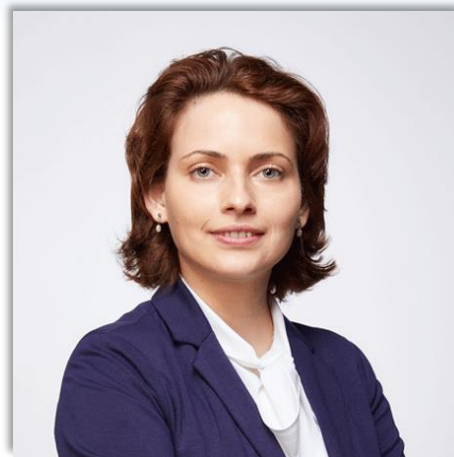
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ADVANCE & PIONEER

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Group Managing Director

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