SALES WEBINAR ON INTERSOLAR INDIA 2018

TOPICS:

• Post Show 2017
• Market
• Exhibitions 2018 / 2019
• Selling Points
2017 FIGURES AND IMPRESSIONS

VISITORS
12,840

DELEGATES
759

EXHIBITORS
238

COUNTRIES
52

 SPEAKERS
119
EXHIBITOR POST SHOW RESULTS

<table>
<thead>
<tr>
<th>Top 5 Exhibitor Countries</th>
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</thead>
<tbody>
<tr>
<td>India</td>
<td>174</td>
</tr>
<tr>
<td>China</td>
<td>25</td>
</tr>
<tr>
<td>Germany</td>
<td>16</td>
</tr>
<tr>
<td>Korea</td>
<td>4</td>
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<tr>
<td>France</td>
<td>3</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Top 10 Exhibitor Indian States</th>
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</thead>
<tbody>
<tr>
<td>Maharashtra</td>
<td>79</td>
</tr>
<tr>
<td>Gujarat</td>
<td>23</td>
</tr>
<tr>
<td>Delhi</td>
<td>19</td>
</tr>
<tr>
<td>Kerala</td>
<td>14</td>
</tr>
<tr>
<td>Tamil Nadu</td>
<td>12</td>
</tr>
<tr>
<td>Karnataka</td>
<td>8</td>
</tr>
<tr>
<td>Telangana</td>
<td>7</td>
</tr>
<tr>
<td>Uttar Pradesh</td>
<td>3</td>
</tr>
<tr>
<td>Haryana</td>
<td>2</td>
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<tr>
<td>Madhya Pradesh</td>
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</tbody>
</table>
EXHIBITOR POST SHOW RESULTS

- **Internationality**: 26% international exhibitors from 16 different countries.
- **Overall Assessment**: 90% of the exhibitors were satisfied with their overall experience at Intersolar India.
- **Future Participation**: 93% expressed interest in exhibiting again in 2017.
EXHIBITOR POST SHOW RESULTS

Achievement of the top objectives from participation during the event:

- 98% Demonstrating market presence
- 97% Imaging building/increasing company recognition
- 94% Building customer relationships
- 93% Attracting new business contacts/customers
- 91% Gaining further information on new products and trends
- 86% Entering the Indian solar market
- 83% Introducing new products

Exhibitors' assessment of the exhibition in detail:

- 94% Reaching your targeted audiences
- 92% Quality of attendees
- 91% Visitor frequency
- 89% International nature of visitors
- 87% Exhibition atmosphere
WHAT EXHIBITORS SAY…

• Goldi Green Technologies: We get very good response and very good visitor quality
• Longi Solar: We expect a good business at this show and good customer footfall at our stall
• Recom: the quality of visitors was above our expectations
• L&T Construction: There is a lot of interest from prospective customers, developers and stake holders
• Hitachi: Every year we are participating and we are getting a good response throughout all 3-days
• Mondragon Assembly: We came last year as a visitor and decided to exhibit. We are having better prospects than what we were expecting in the beginning
VISITOR POST SHOW RESULTS

Visitors by Management Responsibilities (in %)

- 25% Senior Management
- 20% Executive Management
- 20% Other Management
- 15% Consultant
- 20% Other

Attendees by Business Activity (in %)

- 26% Manufacturer/Supplier
- 16% Project Developer/Planner, EPC
- 13% Distributor/Wholesale/Retailer
- 11% Installer/Integrator
- 11% Service Provider
- 23% Others

Top 20 Visitor Areas of Interest (in %)

1. Cells, Modules & Thin Film - 50%
2. Inverters - 48%
3. Power Plants - 43%
4. Batteries, Fuel Cells - 38%
5. Manufacturing Equipment, Materials & Components - 36%
6. Balance of Systems (BOS), Tracking and Mounting Systems - 35%
7. Off Grid Systems - 35%
8. Measurement & Control Technology - 34%
9. Smart Grid Technologies, Grid Management - 32%
10. Solar Thermal Technologies - 32%
11. Financing - 31%
12. Smart Home/Smart Buildings - 31%
13. Electricity Trading & Marketing - 29%
14. Energy Storage Stationary Systems - 24%
15. Solar Thermal Power Plants - 22%
16. Energy Storage Systems for Mobile Applications - 21%
17. Renewable Heating Technologies - 21%
18. Air Conditioning, Cooling - 21%
19. Virtual Power Plants - 21%
20. Information & Communications Technology, Software - 21%

* Multiple answers were possible.
VISITOR POST SHOW RESULTS

Achievement of the top visitor objectives during the event

<table>
<thead>
<tr>
<th>Objective</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Attracting new business contacts/customers</td>
<td>94%</td>
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<tr>
<td>Building customer relationships</td>
<td>94%</td>
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<tr>
<td>Gaining information about new technologies and market developments</td>
<td>94%</td>
</tr>
<tr>
<td>Evaluating opportunities for entry in the Indian solar market</td>
<td>93%</td>
</tr>
<tr>
<td>Closing business deals</td>
<td>91%</td>
</tr>
</tbody>
</table>

Overall Assessment

96% of visitors were satisfied with their overall experience at Intersolar India

Future Participation

95% expressed interest in exhibiting again in 2017.

Purchase Activities

90% reported that their visit would influence future purchase activities.
MARKET
MARKET INDIA

<table>
<thead>
<tr>
<th>Photovoltaics</th>
<th>Energy Storage</th>
<th>E-Mobility</th>
</tr>
</thead>
<tbody>
<tr>
<td>175 GW of renewable energy by 2022 - 100GW from Solar</td>
<td>The global electrical energy storage (ees) market is forecasted to double six times between 2016 and 2030</td>
<td>Current status: EV industry comprises less than one per cent of the total vehicle sales and is dominated by two-wheelers (95 %)</td>
</tr>
<tr>
<td>Indian Solar Installations Grew by 123% to Reach a Record 9.6 GW in 2017 (new large-scale (90%) and rooftop solar (10%) capacity / more than double the 4,313 MW installed in 2016 (India’s total installed capacity: 19.6 GW - 12/2017)</td>
<td>India together with USA and Japan is predicted to install 50% of energy storage systems by 2030</td>
<td>National Electric Mobility Mission Plan: 7 million vehicles by 2020 / EV Nation by 2030 / zero emissions by 2040</td>
</tr>
<tr>
<td>Shift in India’s power mix: Solar was the top source of new power capacity addition in 2017 with installed capacity of 9.6 GW accounting for 45 percent of total power capacity additions. This is the first-time coal was over taken</td>
<td>100 Percent EVs by 2030 can create $300 Billion market for EV batteries in India (could account for more than 1/3 of the global market for electric vehicle (EV) batteries)</td>
<td>EV sales in the country are expected to grow in the double digits until the year 2020</td>
</tr>
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MARKET INDIA

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<td>Solar power is witnessing a rapid pace of installation activity as its cost declines.</td>
<td>Energy storage technologies have strategic importance for India’s energy security and clean energy future</td>
<td>National E-Mobility Program: Energy Efficiency Services will issue fresh tender for additional 10,000 electric cars. Together, 20,000 e-cars will be used by government departments and agencies</td>
</tr>
<tr>
<td>MNRE Has Released $4.07 Million in Funds for Solar Cities Program, implemented in 60 cities across 26 Indian states to boost rooftop solar in India</td>
<td>Industry Players expect 2018 to be a breakthrough year for energy storage in India with demand largely driven by the telecom sector, grid applications, and electric vehicles</td>
<td></td>
</tr>
<tr>
<td>End of 2017 renewables accounted for 65 GW and a 19.4 percent share in India’s energy capacity mix, an increase of about 28 percent. India’s energy consumption is set to double over the next 6-7 years</td>
<td></td>
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</tbody>
</table>
India Solar Cumulative Installations By State (MW)

Cumulative installed large-scale solar capacity now stands at ~15.7 GW

Source: Mercom India Research (Nov 2017)
INDIA SOLAR INSTALLATIONS BY STATE IN 2017

The top four states including Telangana, Karnataka, Andhra Pradesh and Rajasthan, accounted for nearly 75 percent of the total utility-scale installations (8.6 GW) in India in 2017.
Solar Project Development Pipeline By State (MW)

Cumulative capacity for solar projects under development and to be auctioned now stands at just over 17 GW.

Source: Mercom India Research (Nov 2017)
Solar Project Development Pipeline
India’s Solar Installation Outlook Based on Current Market Conditions

India Solar Demand Forecast (MW)

- Annual Rooftop Solar Installations (MW)
- Annual Utility-scale Solar Installations (MW)
- Cumulative Solar Installations (MW)

Source: Mercom India Research (Nov 2017)
DECLINE IN 2018 DUE TO CHALLENGES:

- 70 percent safeguard duty on imported solar cells and modules from China and Malaysia (on a temporary stay)
- Anti-dumping - The Directorate General of Anti-Dumping (DGAD) is expected to issue a recommendation in the second half of 2018.
- Port duty of 7.5 percent (plus education cess) since second half of 2017. The duty is creating an added, unexpected cost for developers.
INDIAN SOLAR IMPORTS

- Solar imports grew by 36 percent to $3.2 billion in FY 2016-17
- The massive uptick in imports is a direct result of higher installation activity in the country.
- Q2-Q3 2017: 40% Drop in Imports, still 44%+ compared to Q3 2016
- Drop reasons:
  - Peak in Chinese module prices
  - Pending anti-dumping case
  - PPA renegotiations in some states
  - Imported solar modules stranded at ports due to misclassification by port authorities
INDIAN SOLAR IMPORTS

Country-wise Breakdown of Indian Solar Imports (%)
FY 2016-17
- China, 88.1%
- Others, 0.6%
- USA, 0.3%
- Hong Kong, 0.5%
- Vietnam, 0.9%
- Singapore, 1.2%
- Taiwan, 1.8%
- Malaysia, 6.6%

Source: Department of Commerce
Mercom India

Country-wise Breakdown of Indian Solar Imports (%)
Jan-Sep 2017
- Others, 0.5%
- Switzerland, 0.2%
- Hong Kong, 0.3%
- Germany, 0.7%
- Vietnam, 1.0%
- Singapore, 1.0%
- Taiwan, 1.6%
- Malaysia, 6.7%

Data from Department of Commerce
Source: Mercom India Research
INDIAN SOLAR EXPORTS

- Solar exports declined by 60 percent, down from the $172 million to $69 million in FY 2016-17
- Q2-Q3 2017: 387% increase, 153%+ compared to Q3 2016
- The United States has exempted India from the levy of a 30 percent anti-dumping duty on its solar imports.
INDIAN SOLAR EXPORTS

Country-wise Breakdown of Indian Solar Exports (%)
(Jan-Sep 2017)

- Denmark, 15.3%
- South Africa, 1.9%
- Yemen, 2.0%
- Spain, 2.4%
- Niger, 2.7%
- Italy, 3.4%
- Croatia, 4.0%
- Senegal, 7.1%
- USA, 7.8%
- Belgium, 7.9%
- Germany, 13.9%
- Turkey, 17.2%
- Others, 14.4%

Data from Department of Commerce
Source: Mercom India Research
# PV MARKET IN THE STATE OF KARNATAKA

## Photovoltaics

| Karnataka’s estimated solar energy potential has been updated from 20 GW to 24.7 GW, and the targeted solar capacity has been increased to 6000 MW by March 2021, which was 4000 MW earlier. |
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| In 2017, Telangana and Karnataka installed over 2 GW each and accounted for approximately 50 percent of all installations across the India. |
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| Karnataka remains in the top for pipeline capacity |
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| BESCOM, power distributor in 8 districts of Karnataka targets 1,000 MW of rooftop solar energy by 2022 for Bangalore alone |
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| Karnataka owns the World’s Largest Solar Power Park - Pavagada - The first phase launched has 600 megawatts of capacity from six developers. – in total 2-2.7GW are expected |
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## E-Mobility and Energy Storage

| Karnataka (Bangalore) is the first state to launch a specific EV Policy / Also Maharashtra (Mumbai) launched their own EV policies |
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| Karnataka to Procure 640 Electric Vehicles Under FAME-India Program |
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| Government of Karnataka intends to make Bangalore – the Electrical Vehicle Capital of India with the Electric Vehicle and Energy Storage Policy 2017 |
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| - Karnataka to become a hub for EV production |
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| - The government will create charging infrastructure by subsidizing charging / battery swapping stations. |
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| - $4.8 billion expected to be poured into e-vehicle manufacturing, creating 55,000 jobs |
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| - Further Actions: skill development centre, joint initiatives with e-vehicle players. |
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ABOUT KARNATAKA – LEADING IN IT / TECHNOLOGY

- Home of many advanced engineering and high tech firms – The Silicon Valley of India
- 400 research and development centers
- Strong growth in GSDP and exports
- Preferred investment destination
- Karnataka has earned the label for
  - IT and technology hub of India
  - World-class research and innovation hub
  - Knowledge Capital of India
  - Known for its automobile industry
  - Many high-profile startups
EXHIBITIONS 2018 / 2019
**INTERSOLAR INDIA 2018 / 2019**

Intersolar India is the country’s most pioneering exhibition and conference for the solar industry

<table>
<thead>
<tr>
<th>Intersolar India Exhibition &amp; Conference In Bangalore, Karnataka</th>
<th>Intersolar India Exhibition &amp; Conference In Mumbai, Maharashtra</th>
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<tbody>
<tr>
<td>December 11-13, 2018</td>
<td>April 4-5, 2019</td>
</tr>
<tr>
<td>Bangalore International Exhibition Centre (BIEC), Hall 1+2</td>
<td>Bombay Exhibition Centre (BEC), Hall 3</td>
</tr>
<tr>
<td>10th Anniversary</td>
<td>11th Edition</td>
</tr>
</tbody>
</table>

**Targets**
- 300+ Exhibitors
- 17,000+ Visitors
- 1000+ Delegates
- 150+ Speakers

**Targets**
- 220+ Exhibitors
- 14,000+ Visitors
- 600+ Delegates
- 80+ Speakers
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<tr>
<td><strong>Areas of Focus</strong></td>
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</tr>
<tr>
<td>• Photovoltaics</td>
<td>• Photovoltaics</td>
</tr>
<tr>
<td>• PV Production Technology</td>
<td>• PV Production Technology</td>
</tr>
<tr>
<td>• Solar Thermal Technologies</td>
<td>• Solar Thermal Technologies</td>
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<tr>
<td>• Solar Plants</td>
<td>• Solar Plants</td>
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<tr>
<td>• Electrical Energy Storage</td>
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<tr>
<td>• Electric Mobility</td>
<td></td>
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<tr>
<td><strong>Conference Focus:</strong></td>
<td><strong>Conference Focus:</strong></td>
</tr>
<tr>
<td>• Global PV Market</td>
<td>• Global PV Market</td>
</tr>
<tr>
<td>• India’s Future PV</td>
<td>• India’s Future PV</td>
</tr>
<tr>
<td>• Energy Storage / E-Mobility Market</td>
<td>• Western / Northern Indian Solar Markets</td>
</tr>
<tr>
<td>• Southern / Eastern Indian Solar Markets</td>
<td>• Financing</td>
</tr>
<tr>
<td>• Technology</td>
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</tbody>
</table>
Solar Project Development Pipeline
Why does Intersolar India move to Bangalore?

Bangalore is the capital city of Karnataka. In 2017 the state of Karnataka was one of the most flourishing Indian solar markets and the first Indian state to launch a specific EV policy. Furthermore, Karnataka is known as India’s Silicon Valley and technology hub. The perfect location to promote not only the solar market but also new energy market opportunities, like the energy storage and electric mobility markets.

Why does Intersolar India take place twice?

Intersolar India wants to provide exhibitors and visitors with the possibility to get their footprint into 2 key markets in India:
1. Southern Markets in Bangalore - India’s Silicon Valley and solar technology hub
2. Western Markets in Mumbai – India’s hub for financing

Will each event have a conference? What program can be expected?

Each event will have a conference. The events will have a differentiated conference and exhibition program. The Bangalore conference and exhibition program will focus on India’s southern and eastern markets, technologies, innovations and new energy opportunities like energy storage and electric mobility solutions. The Agenda will be available in April / May 2018. The Mumbai conference and exhibition program will focus on western and northern solar markets and financial topics.

How are the facilities in Bangalore?

The facilities in Bangalore are very modern and highly developed, close to western standard. There is a separate conference area located next to the exhibition halls.
INTER SOLAR INDIA 2018 / 2019

Exhibitor Profile

- Manufacturers, suppliers, distributors and service providers
- System providers
- System integrators
- Project developers/EPC contractors
- Providers of grid infrastructure and solutions for the integration of renewable energy
- Certification institutes
- Research and development institutes
- Associations/societies
- Trade media, publishing
- Financial services

Visitor Profile

- Installers and Integrators
- Project Developers/EPC Contractors
- Manufacturers and Suppliers
- Distributors
- Energy Consultants
- Utilities
- Investors and Analysts
- Architects/Energy Planner
- Government Officials/Decision-makers
BANGALORE INTERNATIONAL EXHIBITION CENTRE
Marked reservations hold until April 10, 2018

Benefits of Exhibition Centre:
• "European-like" facility standard
• No Pillars
• Separate high quality conference facility
Any company which decides to exhibit at both Bangalore 2018 and Mumbai 2019 on or before 15th July 2018 will be given a 15% discount on the booth space fees at Intersolar India in Mumbai.

1. Raw space is the rental of floor space only and does not include any utilities, services, walls, carpet or furnishings. Included with each booth space: web listing with link to your exhibitor website, free listing in the official event directory, complimentary visitor brochures, free visitor registration for your customers and exhibitor badges (4 badges per 9sqm).

2. Participants of the Intersolar Membership Program who exhibit in at least one additional exhibition (Intersolar/ees Europe, Intersolar/ees North America, Intersolar South America, Intersolar Middle East) within the last 12 months as well as Intersolar India 2017 exhibitor qualify for the member rate. Please be aware: a retroactive discount is not possible.

3. A minimum booth size of 18 sqm is for an individual booth construction required.
BOOTH CONSTRUCTION

Basic Booth Design 1
For example 9 sqm, €35 per sqm:

- Stand height: 2.50 m
- Carpet, needle punch, grey (standard)
- Wall panels, white, 2.5 m height, system
- 1 Counter (table) (white), 1,080 x 540 x 750 mm
- 2 Chairs
- 1 Waste paper basket
- 3 x 100 W spotlights
- 1 x 13 A/220 V, 500 W power socket (power up to 1 KW per socket)
- Company name on Fascia
BOOTH CONSTRUCTION

Basic Booth Design 2
For example 9 sqm, €45 per sqm:

- Stand height: 3 m
- Carpet, needle punch, grey (standard)
- Wall panels, thick 2.5m height, system
- 1 Square table, white, (H-750 x W-945 x D-400 mm)
- 4 Chairs
- 1 Cabinet (H-750 x W-945 x D-400 mm)
- 1 Waste paper basket
- 3 x 100 W spotlights
- 1 x 13 A/220 V, 500 W socket (power up to 1 KW per socket)
- Backlit Fascia
BOOTH CONSTRUCTION

Basic Booth Design 3
For example 18 sqm, €80 per sqm:

- Stand height: 4 m
- Carpet, needle punch, grey (standard)
- Seamless wall panels, 2.5 m height, system
- Branding option (H-3 m x W-0.5 m) companies logo (H-1 m x W-2.5 m)
- 2 Square tables, white, (H-750 x W-750 x D-750 mm)
- 8 Visitor chairs
- 1 Counter table, white
- 2 Waste paper baskets
- 9 x 100 W spotlights
- 2 x 13 A/220 V, 500 W sockets (power up to 1 KW per socket)
- 1 Cabinet (H-750 x W-945 x D-400 mm)
- Plexi Glass Fascia with company logo (H-1,500 mm x W-3,000 mm)
WHY EXHIBIT AT INTERSOLAR INDIA

- Karnataka is the best location for solar, energy storage and emobility promotion (Bangalore)
- Maharashtra is the financial hub and the best state to find out about western solar markets
- Most Pioneering Solar Exhibition and Conference since 10 years
- High quality of business professionals with 80% decision-makers
- Internationality: Visitors from 52 countries and Exhibitors from 16 countries
- 94% of exhibitors reached their target groups
- High visitor frequency – 54 Visitors per Exhibitor
- High satisfaction of visitors and exhibitors with the overall experience
- Cross-sector opportunities: PV meets Energy Storage and E-Mobility at the special exhibitions ees India and ees Power 2 Drive India
- 1/3rd of Visitors are interested in new Segment Energy Storage
- Exhibition and Conference facilities are close to European Standard and do not have pillars (in Bangalore)
- High caliber conference and workshops with focus on solar, energy storage and emobility
- Buyer-Seller Forum: opportunity to meet investors and attract new business customers prescheduled b2b meetings for the exhibitors
- Part of the Intersolar global series with 27 years experience
- Services for exhibitors: Intersolar AWARD, Global membership program, marketing opportunities, company presentation on the exhibition Stage
SALES TIMELINE

- Ongoing: Calls of old exhibitors (2015-2017) and Sponsorship Sales
- March: Post Show Report and Exhibitor brochure available
- Mid of April: Postmailing of the Exhibitor brochure and calling campaign
- June: Postmailing of postcards, sales mailer and calling campaign
- July 15, 2018: deadline to receive a 15% discount on Mumbai if both events are booked.
- End of October: Entry deadline for Event Directory
CONTACT INFORMATION

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Fax: +49 7231 58598-28
feth@solarpromotion.com
THANK YOU FOR YOUR SUPPORT

WELCOME TO INTERSOLAR INDIA