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FiDiPro ´13 - ´16 – Towards Value Capture and Investability

# Emergence of Cross-Sectoral CleanTech Industry Ecosystems:

## How does your solution fit into the puzzle?

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# FINANCIAL INNOVATION FOR INDUSTRIAL RENEWAL

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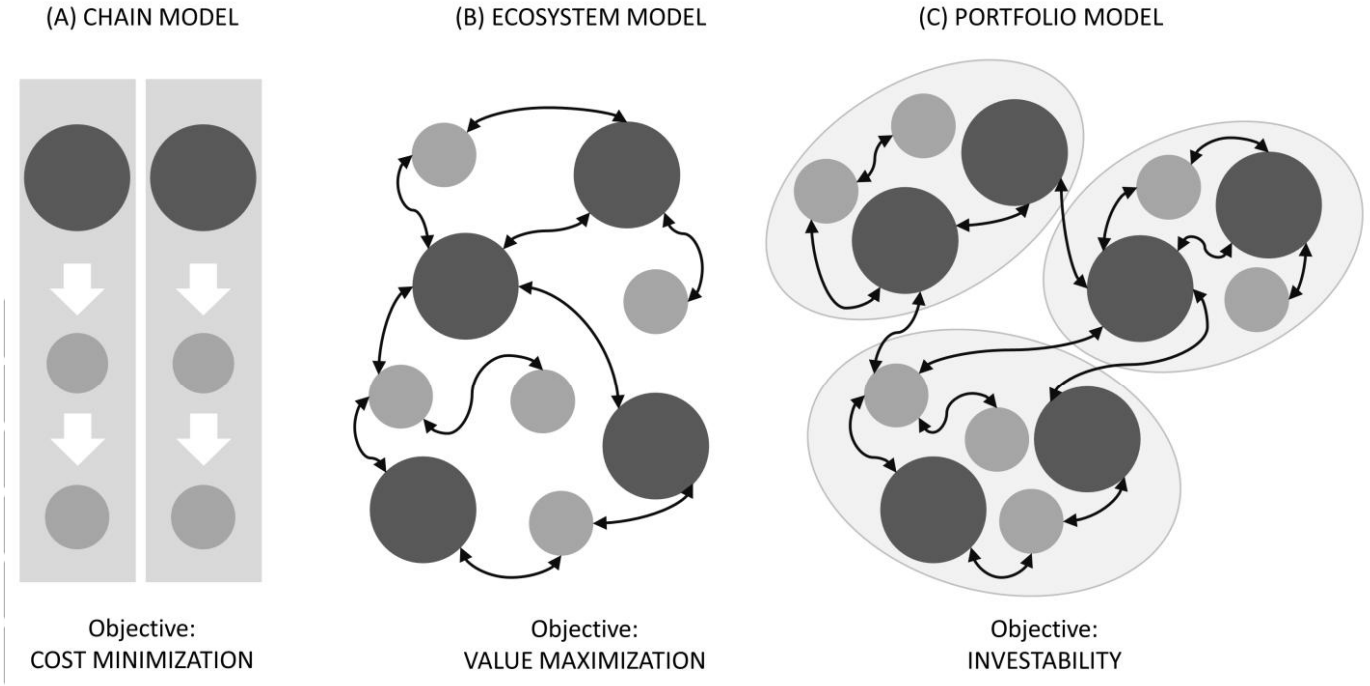
# Of Sectors, Matrices and Ecosystems

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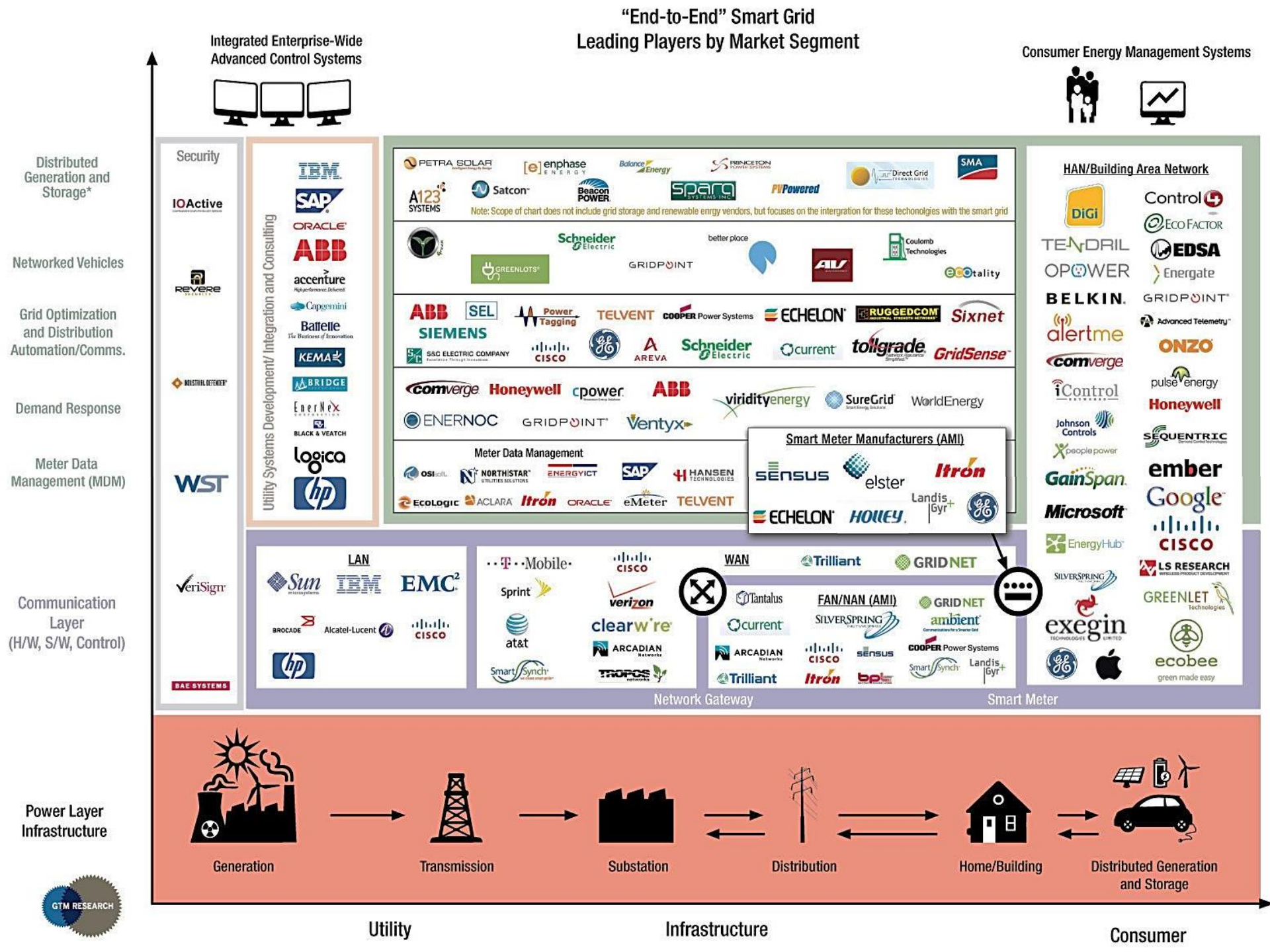
# SMART GRID

# "End-to-End" Smart Grid
# Leading Players by Market Segment



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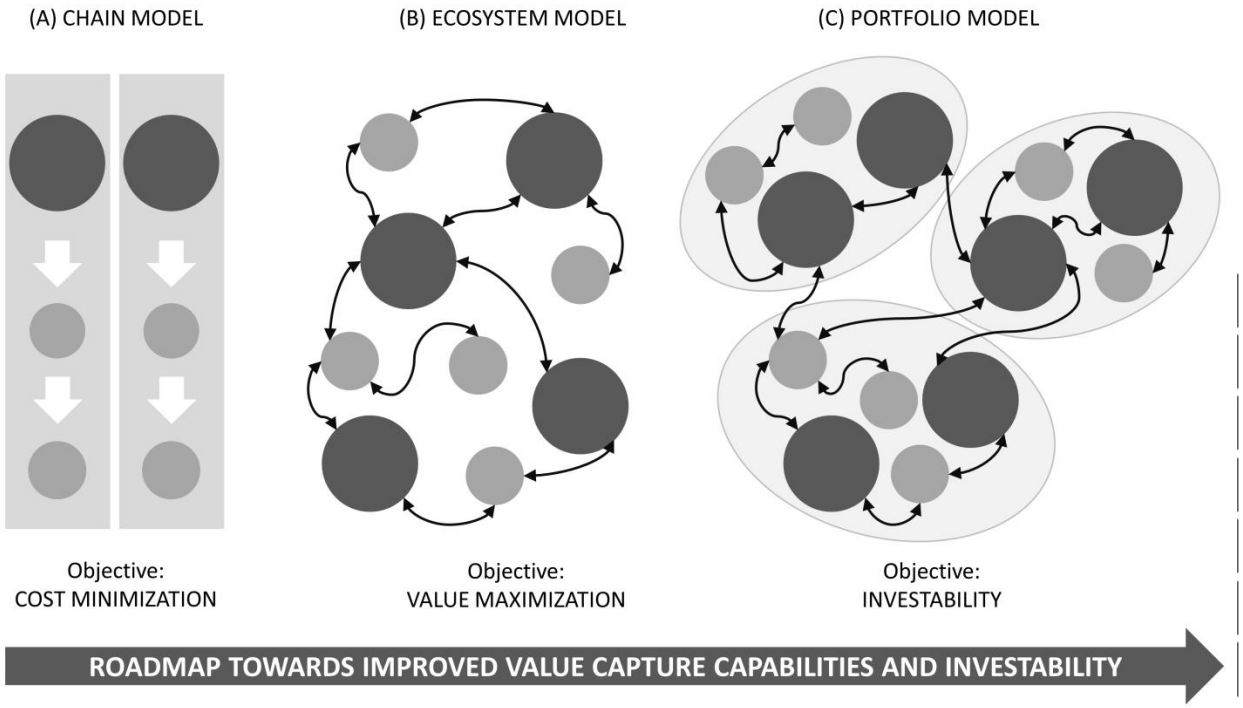


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# Smart Grid Industry

## Network density & financial exposure

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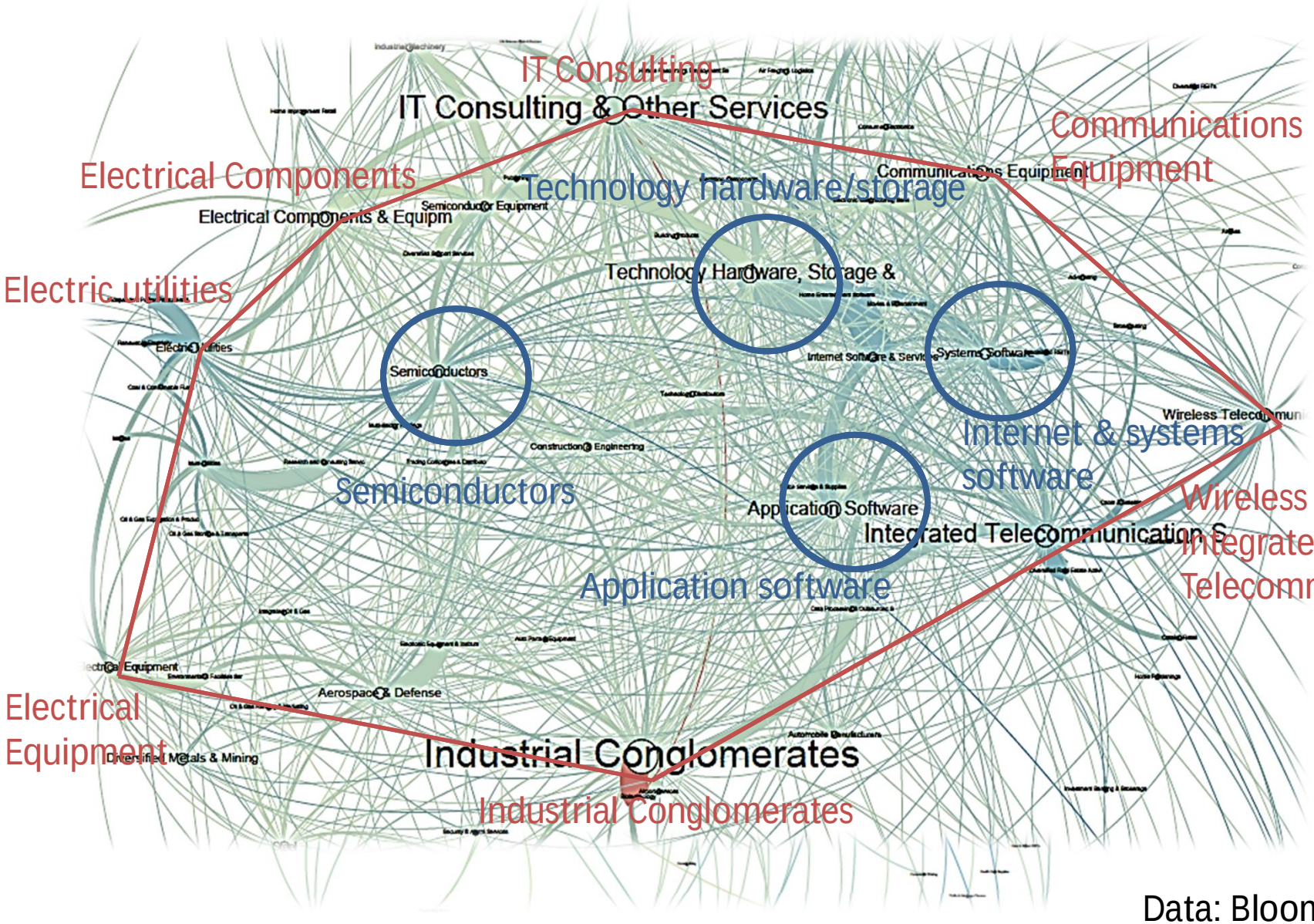



Data: Bloomberg

# BIOECONOMY

# Biobased chemistry

## Examples close to consumers:

Paints containing binders based on vegetable oils

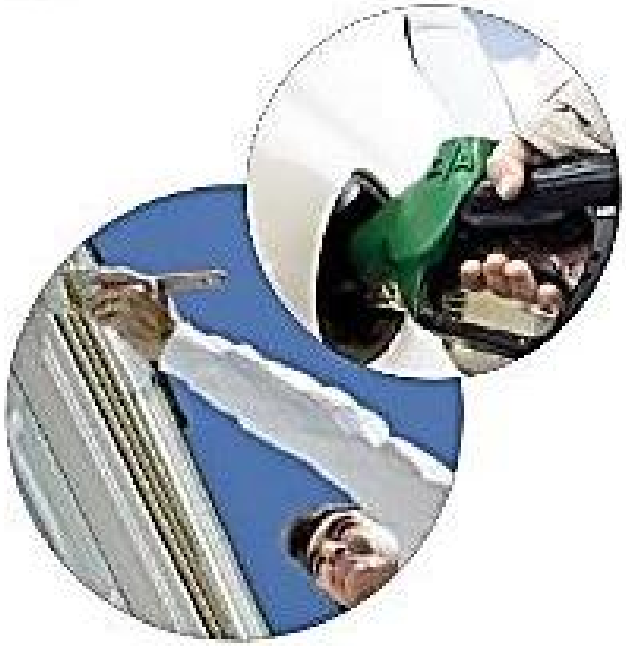
Advanced biofuels

Cellulose gum as yoghurt thickening agent and tall oil products for glues

Car tyres containing natural rubber and oils

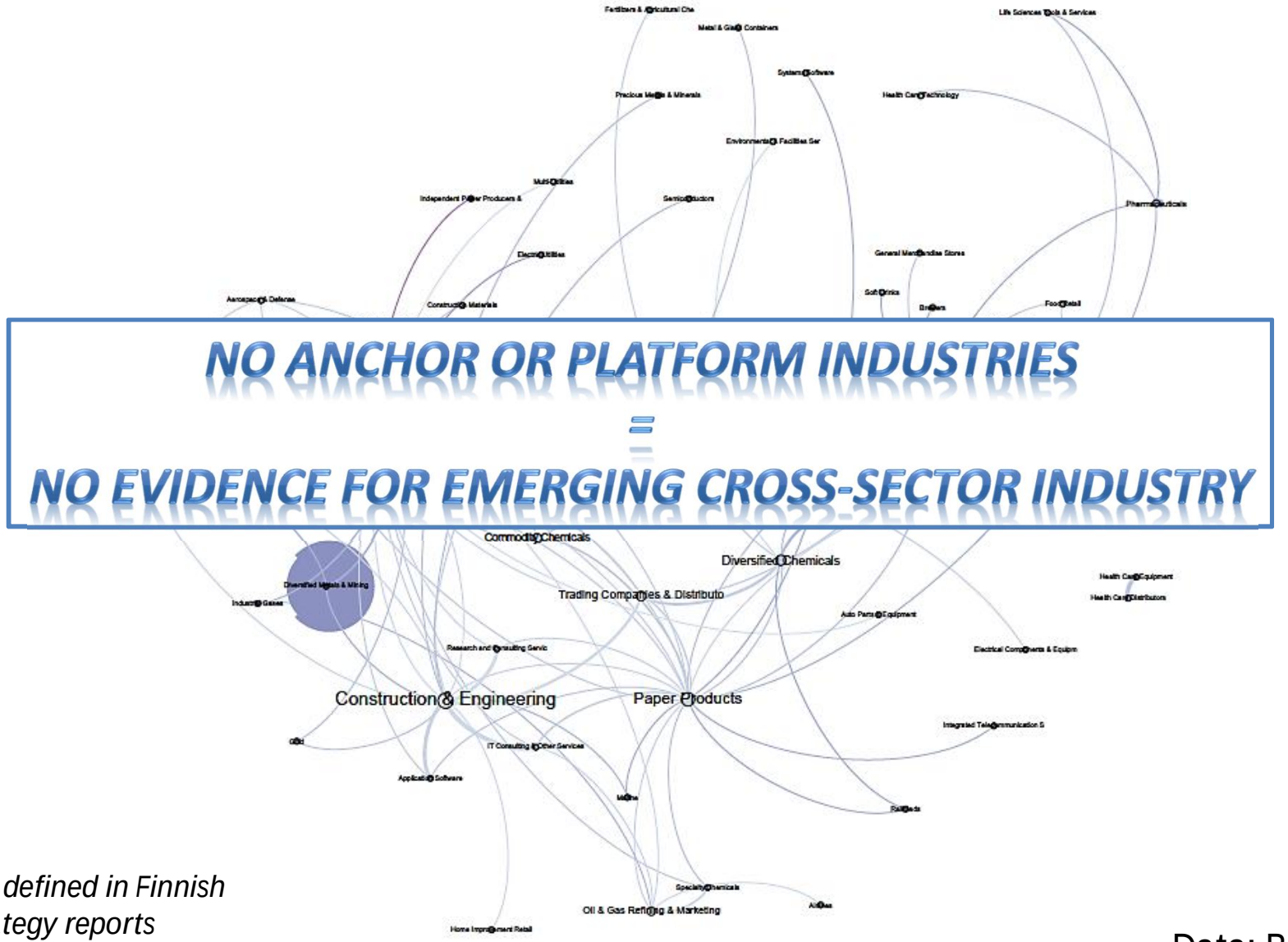
Cosmetic creams containing forest berry ingredients

Biobased materials for packaging and medicine



# Bioeconomy*:

## Network density & financial exposure




**As defined in Finnish Strategy reports*

Data: Bloomberg

# Green Chemistry Industry:

## Network density & financial exposure

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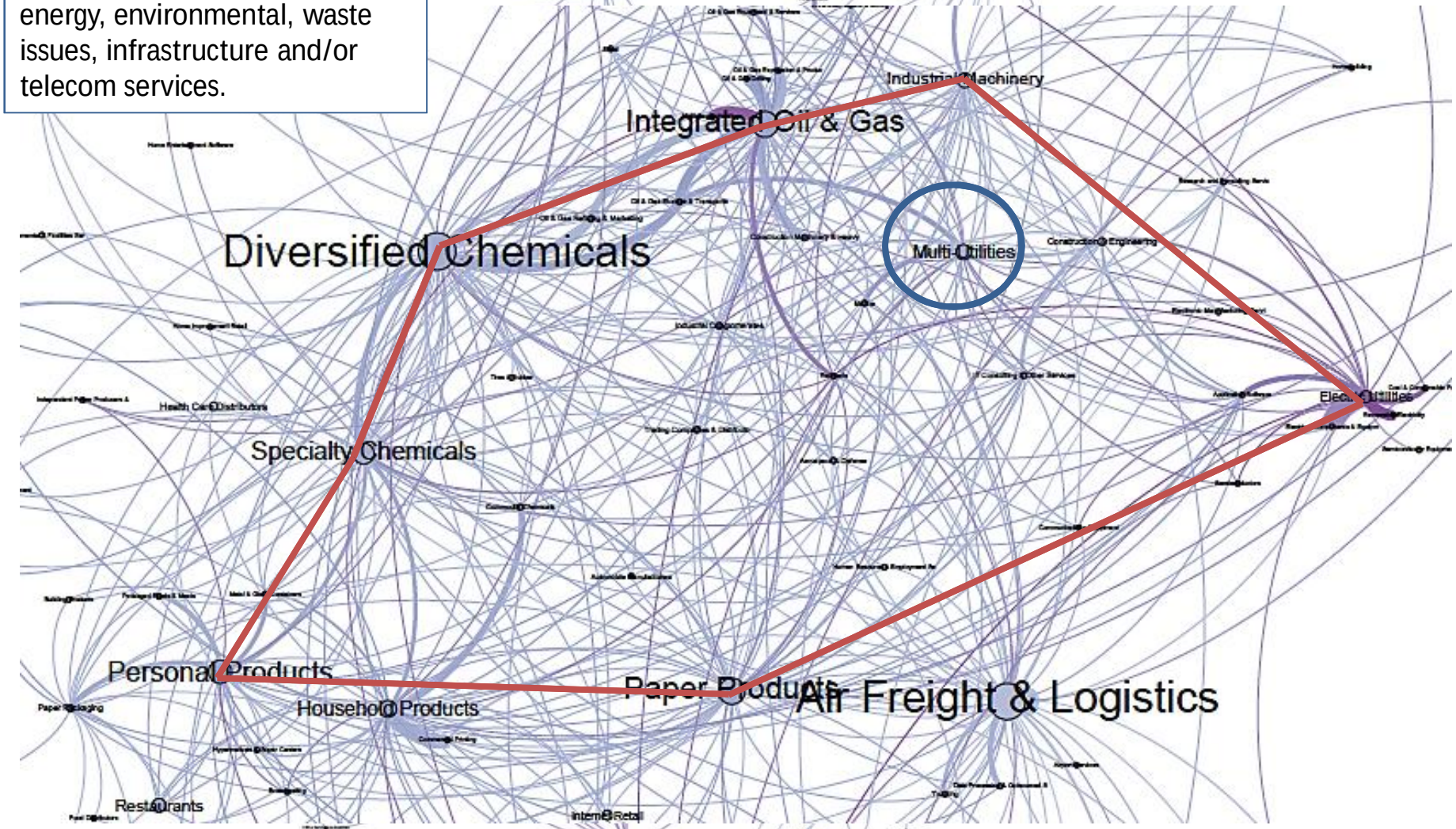
Multi-utility: companies offering energy, environmental, waste issues, infrastructure and/or telecom services.

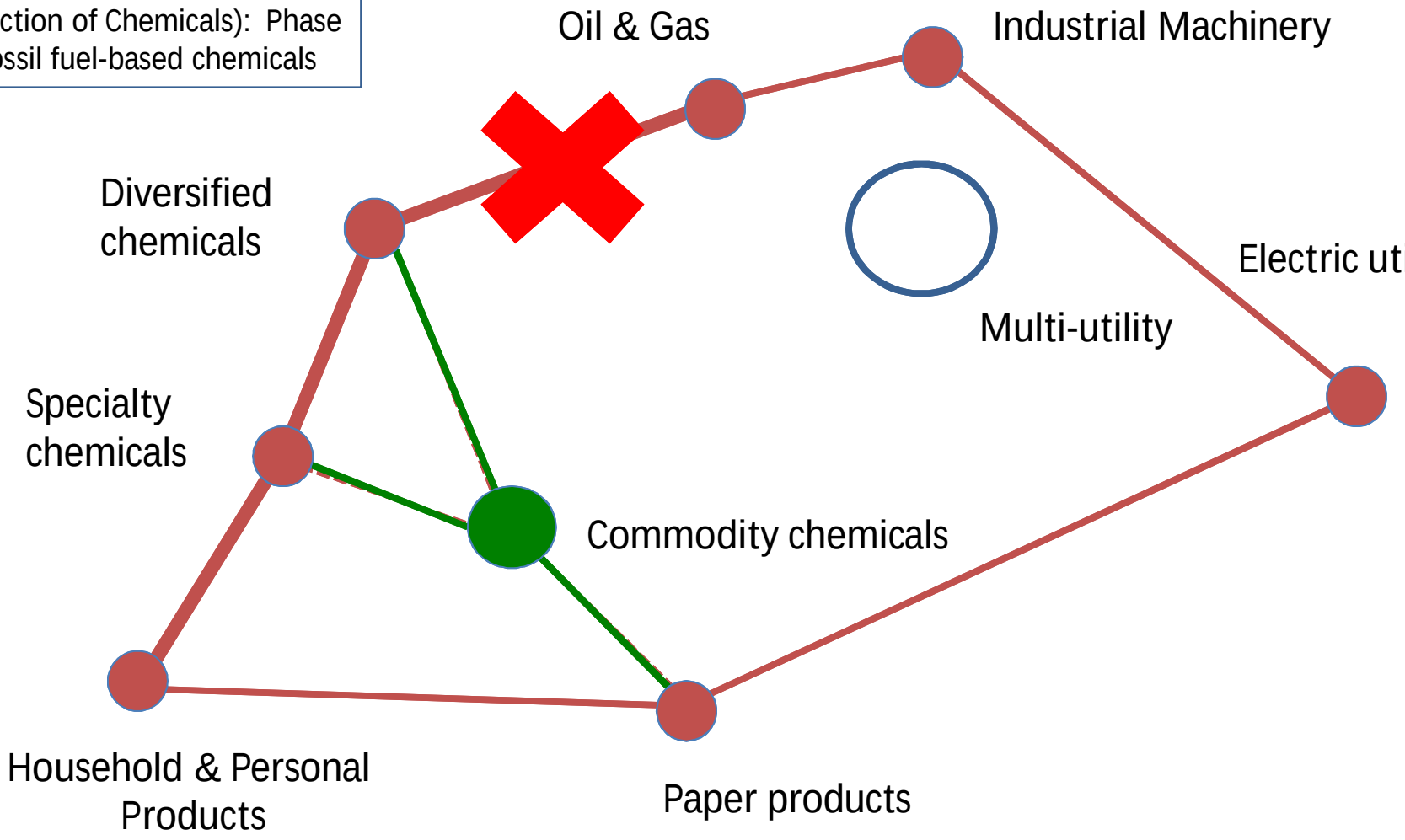



Data: Bloomberg

# Green Chemistry Industry:

## Nascent connectivity – A Policy Opportunity?

EU REACH (Registration, Evaluation, Authorization and Restriction of Chemicals): Phase out fossil fuel-based chemicals




Source: Bloomberg & CleanTech Group i3 Platform

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# Conclusions

1. To understand the structure of emerging industry ecosystems, one should look at factual relationships.
2. These ecosystems consist of interconnected anchor and platform industries.
3. Smart grid and new mobility industries are evolving because of internal- and market-driven demands, enabled by IT and big data infrastructure.
4. The bioeconomy is static and does not constitute an emerging industry. Green chemistry industries will need to be driven by policy design.