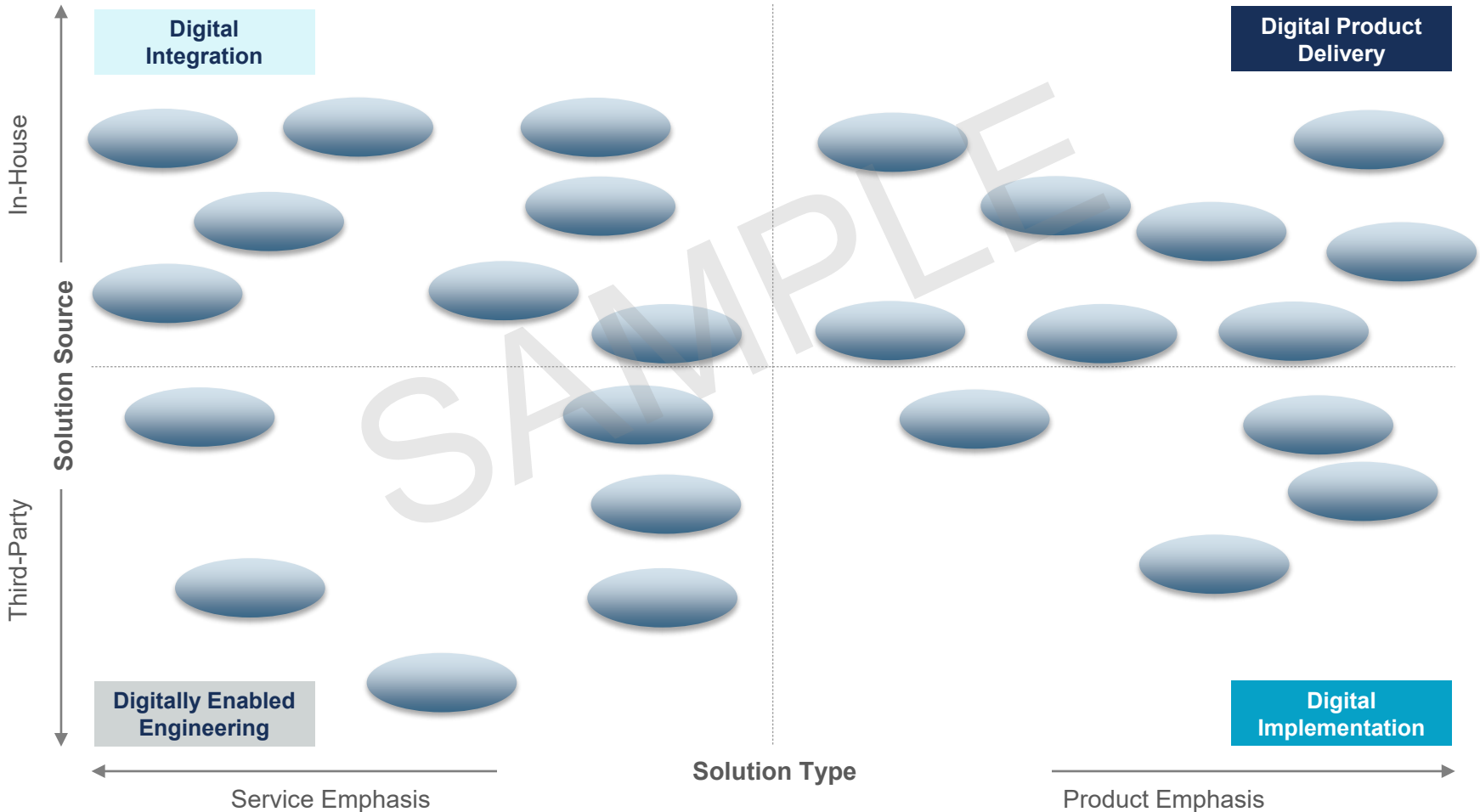


Competitive Positioning of EPCs in the Digital Water Market

Engineering consultancies have approached digital value creation in four primary ways, which differ in terms of their reliance on third-party vs. internally developed software, and their emphasis on products vs. services.

Digital Water Strategic Positioning by EPC Firm



Source: Bluefield Research

Digital Water Requires Rethink of EPC Business Model, Strategy & Structure

Engineering firms, digital vendors operate in fundamentally different ways, forcing EPCs to adopt new approaches to business & product development, sales & marketing, and organization & management to compete in digital.

	Engineering Consultancies	Digital Solutions Providers
Business Model	<ul style="list-style-type: none"> • XX • XX 	<ul style="list-style-type: none"> • XX • XX
Product Strategy	<ul style="list-style-type: none"> • XX • XX 	<ul style="list-style-type: none"> • XX • XX
Go-to-Market Strategy	<ul style="list-style-type: none"> • XX • XX 	<ul style="list-style-type: none"> • XX • XX • XX
Personnel & Corporate Structure	<ul style="list-style-type: none"> • XX • XX 	<ul style="list-style-type: none"> • XX • XX

Source: Bluefield Research

Company

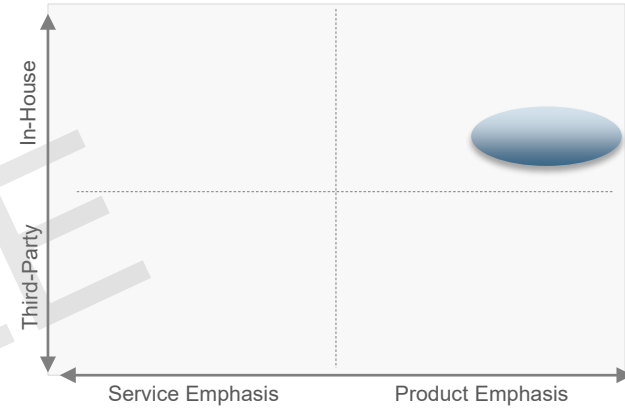
Digital Water Strategy

Overview

Key Innovation Projects

- Project overview
- Project overview

Digital Water Strategic Positioning



Key Partners

- Company
- Company

Organization/Management

- Details
- Details

M & A Activity/Partnerships

- Details
- Details

Source: Company, Bluefield Research