BLUEFIELD RESEARCH

Why Companies Leverage Our Custom Water Insights
Vendors and utilities addressing water & wastewater as a business are increasingly confronted by unique challenges and opportunities requiring more informed, data-backed intelligence to...
WHY COMPANIES LEVERAGE OUR CUSTOM WATER INSIGHTS

**typical OPTIONS**

Decision-makers often turn to options that do not always match the challenge...

**Do it Yourself**
- Less expensive
- Overlooks opportunity cost
- Inherent analysis bias

**General Consultants**
- Easier, but expensive
- Educate-up the generalists on water
- Fail to capture industry nuances
WHY COMPANIES LEVERAGE OUR CUSTOM WATER INSIGHTS

better SOLUTION

Demonstrated water sector knowledge, data, and client endorsements enable greater confidence in presentations to customers, managers, board members, and investors…

WATER EXPERTS

A team of business-focused analysts exclusively focused on water & wastewater markets, companies, and trends full-time.

DATA-DRIVEN ANALYSIS

Proprietary data enabling independent, bottom-up, and actionable intelligence backed by a transparent methodology that clients can understand.

DEMONSTRATED MODEL

Validated by leading companies across the value chain addressing water as a business.

CLIENTS
### Select Clients Leveraging Bluefield Insights

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<th>Technology &amp; Equipment</th>
<th>Engineering &amp; Services</th>
<th>Public &amp; Investor Owned Utilities</th>
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### Segmenting Clients Across the Value Chain

- **Technology Vendors:** Leakage Management, SCADA, Meters, Asset Management
- **Hardware Suppliers & Distributors:** Pipes, Fittings, Valve Manufacturers
- **Engineering Firms:** Consulting, Design, Construction
- **Financial Players:** Investment Banks, Private Equity, Venture Capital, Corporate Investors
- **Utilities:** Public & Investor Owned Utilities
- **Outsiders Looking In:** Natural Gas & Electric Power Companies, Telecommunication Providers

Leading brands reliance on Bluefield’s water market intelligence demonstrate the added value...
delivering ANSWERS

Bluefield’s team of water experts is poised to strengthen your company’s decision-making by addressing your critical questions…

**What’s my company’s addressable market?**
- Model ten-year forecast of U.S. ductile iron pipe market by state, size, and capital expenditures.
- Global utility spending outlook for advanced oxidation technology and key drivers for growth.
- Size the North America and Europe markets for electric drives & motors in municipal water sector.

**When will approaching market shifts impact technology adoption?**
- M&A support for nutrient treatment technology solutions and potential for growth in select regions.
- Sensitivity analysis for supply & produced water management demand in Texas’ Permian Basin.
- Frame the digital water landscape and outlook for utility customer management solutions.

**How do we stack up against our peers?**
- Evaluate trench shoring hardware solutions & competitive landscape for new product entry (e.g. M&A).
- Analyze equipment financing programs across water industry for market entry strategy.
- Strategy review of engineering firms competing for UK utility management contracts (i.e. AMP)

**Who are our potential partners & customers?**
- Analysis of U.S., Australia, and UK telemetry, SCADA, and utility optimization opportunities.
- Benchmark European utility operations in support of smart meter rollout.
- Prioritize U.S. utility leakage management strategies and potential for new technology adoption.
WHY COMPANIES LEVERAGE OUR CUSTOM WATER INSIGHTS

core CAPABILITIES

Direct access to the market and ongoing analysis enables clients to stay in front of critical factors influencing decisions today and going forward…

Targeted Market Forecasts

- Geographic, sector-specific methodology & forecasts
- Technology adoption rates
- Alternative technology solutions
- Regulatory & policy sensitivity analysis
- Due diligence support for M&A & partnerships strategies
- Partnership identification & matchmaking
- Identifying channels to market

Ongoing Market Guidance

- U.S. & Canada Municipal Water Insight Service
- Global Municipal Water Insight Service
- Global Industrial Water Insight Service
- U.S. & Canada Industrial Water Insight Service
- Benchmarking operational and financial data
- Mapping innovative ecosystems & potential markets for growth
- Assessing the voice of the customer

Tailored Strategic Support

Quantifying Customer Perspectives

ADVANCING WATER STRATEGIES
Global companies across the value chain are developing strategies to capitalize on greenfield opportunities in water -- new build, new business models, and private investment. Bluefield Research supports a growing roster of companies across key technology segments and industry verticals addressing risks and opportunities in the new water landscape.

Companies are turning to Bluefield for in-depth, actionable intelligence into the water sector and the sector's impacts on key industries. The insights draw on primary research from the water, energy, power, mining, agriculture, financial sectors and their respective supply chains.

Bluefield works with key decision-makers at utilities, project development companies, independent water and power providers, EPC companies, technology suppliers, manufacturers, and investment firms, giving them tools to define and execute winning strategies.

Contact Bluefield Research

NORTH AMERICA
192 South St // Suite 550
Boston, MA 02111
T +1 617 910 2540

EUROPE
Carrer de Sant Joan de la Salle 42
Edifici Technova 2.12
08022 Barcelona Spain
T +34 93 681 4325

waterexperts@bluefieldresearch.com
www.bluefieldresearch.com