BLUEFIELD RESEARCH

Advancing Water Strategies in a Changing Landscape
Water supplies and existing assets are under pressure, impacted by changing weather patterns, pollution, and aging infrastructure in both developed and emerging markets.

**WATER SCARCITY**

1.2 billion people live in regions with physical water scarcity, and another 500 million are on the verge—mostly in emerging economies.

**AGING INFRASTRUCTURE**

$2.9 trillion of existing water, wastewater, and stormwater assets are under utility management in 31 developed countries.

**CLIMATE CHANGE**

7 years running, water supply and water crises have landed in the Top 5 Global Risks in terms of impact, including utility infrastructure.
of the world’s projected 10 billion population will live in cities by 2050, including a more water intensive, emerging middle class.

of global water consumption in 2040 will be from industrial consumption, up from 21%, today.

billion devices will be connected to the internet by 2020, driving up demand for information and connectivity to critical infrastructure.
typical OPTIONS

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

DO IT YOURSELF

• Less expensive and time consuming
• Overlooks opportunity cost
• Inherent analysis bias

GENERAL CONSULTANTS

• Easier, but expensive
• Educate-up the generalists on water
• Fail to capture industry nuances
our SOLUTION

Bluefield’s team of water experts address critical questions and opportunities with data-backed insights...

A team of business-focused analysts **exclusively focused on water** in the industrial and municipal sectors.

**Proprietary data** enabling independent, bottom-up and actionable intelligence backed by a transparent methodology.

A growing **roster of clients** across the value chain rely on Bluefield’s proven research model.
The water industry faces significant challenges—underinvestment and mounting threats to water quality and availability. Bluefield tracks demand drivers and opportunities for new solutions.
Supporting clients’ needs through independent insights:

- **We stand behind our research**, providing clients full support including follow-up research, clarification, and methodology reviews provided on a 24/7 basis.

- **A combination of primary research and an analytical model** stressing industry structure and dynamics, competitive analysis, and strategy drivers.

- **Exclusive focus on water**, allowing for business insights based on unique industry metrics and access to a network of industry contacts.

Vendors and utilities addressing water & wastewater as a business are increasingly confronted by unique challenges and opportunities requiring more informed, data-backed intelligence…
Annual Insight Service clients receive a stream of data-rich analysis of key market and competitive drivers, including business models, policy changes, forecast scenarios, and technology trends.
insight REPORTS

Bluefield’s reports are thorough, informative, and a great way for us to share knowledge across all levels and sectors of the company.

Kathleen Udasco,
Senior Communications Strategy Specialist, American Water

Available for instant purchase, Bluefield’s Insight Reports provide rich data, in-depth analysis, and industry metrics on specific water market segments.

Clients get the most out of Bluefield reports with added value, including:

› a full set of PDF, PPT and data XLS files

› updates for one year following purchase for select titles

› one-time analyst support to provide clarification, address specific questions following purchase

Thematic Reports

- Digital Water: Key Trends, Project Activity and Market Outlook
- U.S. Private Water Utilities: Drivers, Competitive Landscape and Acquisition Trends
- U.S. Municipal Water Infrastructure: Utility Strategies & CAPEX Forecasts
- U.S. Municipal Water and Wastewater Utility Rate Index
- Water for Hydraulic Fracturing: Forecasts and Trends in Water Management
- Opportunities in U.S. Industrial Water: Market Size, Trends, and Forecast
- Almost 50 Years with the Clean Water Act: Analyzing Federal and State Enforcement Approaches and Trends
- Where are the Best Opportunities in Industrial Reuse?
- Advanced Asset Management for Municipal Water: Global Trends & Strategies
- UK Municipal Water: Market Performance and Outlook
- Smart Water Down Under: Australia Water Utilities Deploy Advanced Technologies in Search of Operational Efficiency
- Water M&A: Key Trends in a Changing Global Landscape
- Veolia Water Strategy: Breaking Down Global Positions
- Global Industrial Water: Quarterly Briefing
- Sizing Industrial Water Markets: The BRICS and Select Emerging Markets
- Water and Mining: What in the World is Happening with Tailings?
**bluefield NAVIGATOR**

**The Challenge:**
Confronted with a lack of transparency across fragmented market sectors, companies and utilities in water and wastewater are challenged to secure clean, reliable data.

**Make More Informed Decisions:**
Bluefield’s data platform ties together a range of municipal, industrial, and digital water market datasets, to make stronger, more informed strategic decisions over time.

> We save considerable time and resources preparing for company presentations and board meetings by leveraging Bluefield’s team of analysts and their data and insights into key water sector trends.

Marty Kropelnicki. President & CEO California Water Service Group

---

**The Benefits of Data Navigator:**
- **Real-time updates** as soon as they are published.
- **Visualization** to help you identify key insights and trends.
- **Flexibility to drill down** into your specific data needs.
- **Save time and effort** you would otherwise use searching and sorting through Excel spreadsheets and pdfs.
- **Easy access** to our platform from your desktop, tablet, or smartphone.

---

**Interactive Data Dashboards**

- **Water M&A**
  - Digital Water
  - Technology, Equipment, & Services
  - Midstream Water
  - Investor Owned Utilities

- **Project Data**
  - O&M Contracts
  - Water Reuse
  - Global Desalination
  - Public-Private Partnerships
  - Public Funding Requests & Awards
  - Industrial & Municipal Consent Decrees
  - State Revolving Funds
  - Digital Tech. Projects

- **Company & Market Trends**
  - Venture Capital Investment
  - Desalination Ownership
  - Water Company Rankings
  - Investor Owned Utility Profiles
  - Military Management Contracts
  - Capital Improvement Plans
  - Employment & Construction Indicators

- **Market Forecasts & Scenarios**
  - Digital Water
  - Industrial Water
  - Water for Hydraulic Fracturing
  - Water Reuse
  - Utility OPEX
  - Utility CAPEX
  - Pipe Network & Materials

---

ADVANCING WATER STRATEGIES
When it comes to answering big questions or solving complex problems, having a partner like Bluefield Research can be a game-changer.

Greg Osthues, Water Service Line Director, Arcadis

### Addressing Critical Questions

#### What’s my company’s addressable market?
- 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.
- Develop market size and potential for base-of-pyramid focused water supply & treatment strategy.

#### 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).

#### 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.

#### Who are our potential partners and 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.
Bluefield’s team of experts has decades of experience in providing value-added insights to global energy, power, telecom, and water companies across their respective value chains. Our spheres of expertise include market entry strategies, competitive analysis, funding strategies, and benchmarking.

The team’s international business backgrounds enable Bluefield to support clients’ critical decisions with the big picture in mind amidst an increasingly competitive and evolving water landscape. This range allows Bluefield’s team to deliver unparalleled insights—supported by rich market and competitive intelligence—into the critical factors shaping industrial and municipal water markets.
Supporting companies across the value chain

Bluefield Research supports companies across the water value chain—both municipal & industrial—with authoritative, actionable water market intelligence.

Our relationship-driven business model, in which interactive analyst support is a central tenet, is structured to empower our clients to make the best strategic decisions in a changing global landscape.
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