



Paul O'Callaghan
O₂ Environmental Inc
www.o2env.com

www.bluetechtracker.com

Technology Showcase Areas

1. Produced Water, Decentralised Treatment & re-use
2. Smart Infrastructure
3. Advanced Desalination
4. Energy & Resource Recovery



Brave Blue World

Water is a Local Issue



Re-thinking Water Systems Efficiency



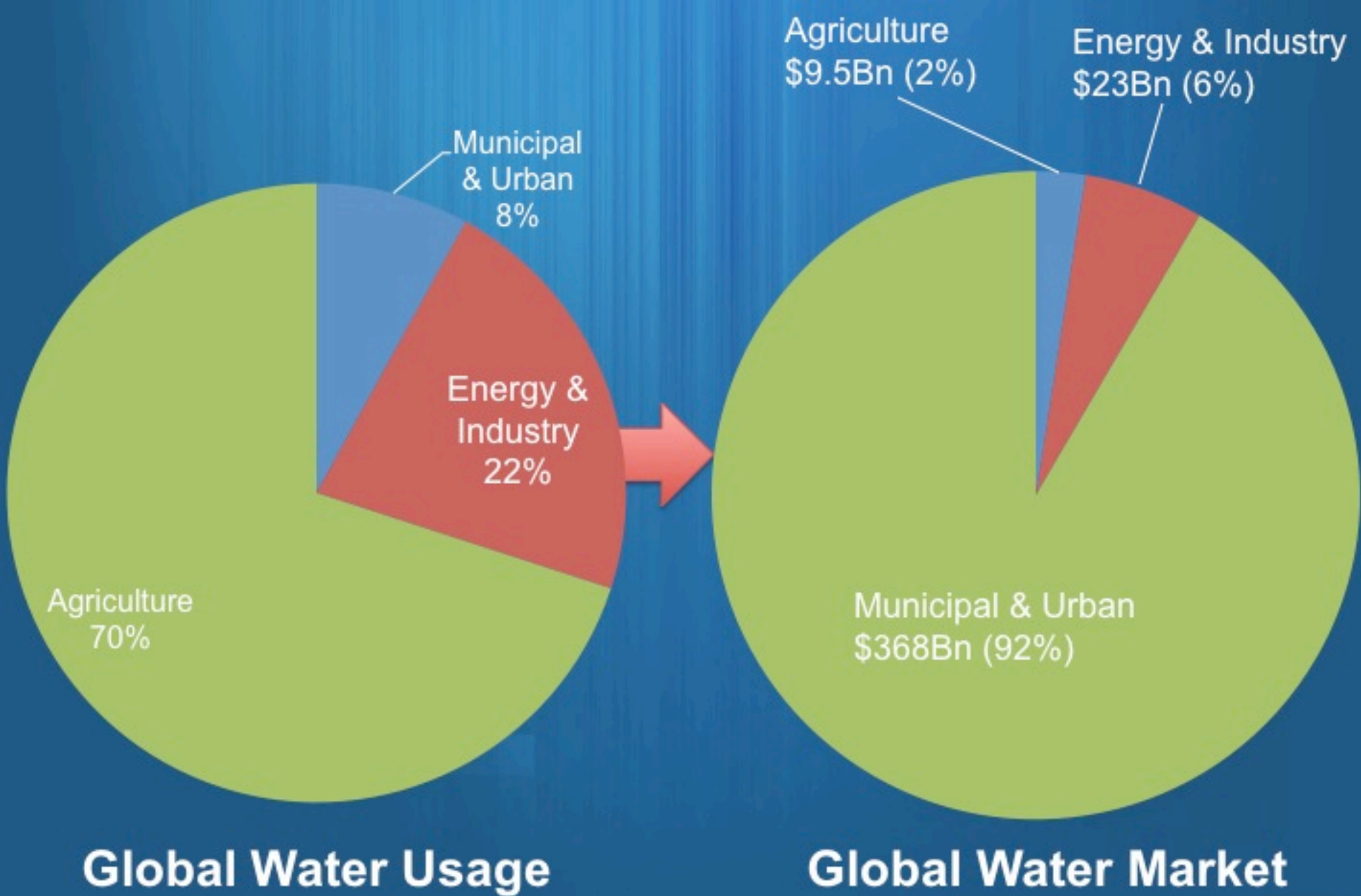
Providing water services... ...without water



Global Water Use

- Agriculture: 70%
- Energy & Industry: 22%
- Municipal and Urban: 8%

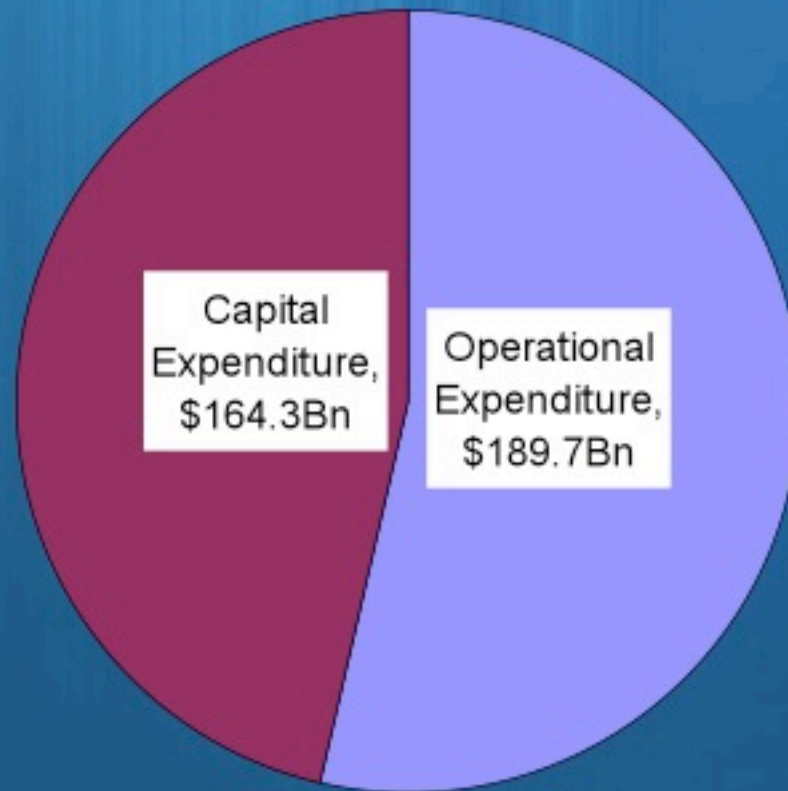




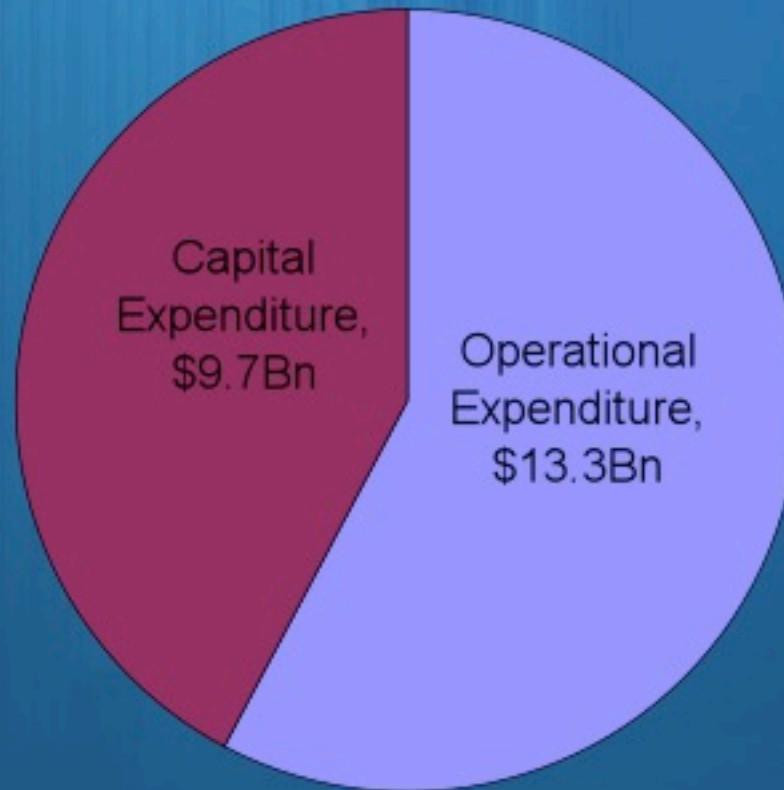
Global Water Usage

Global Water Market

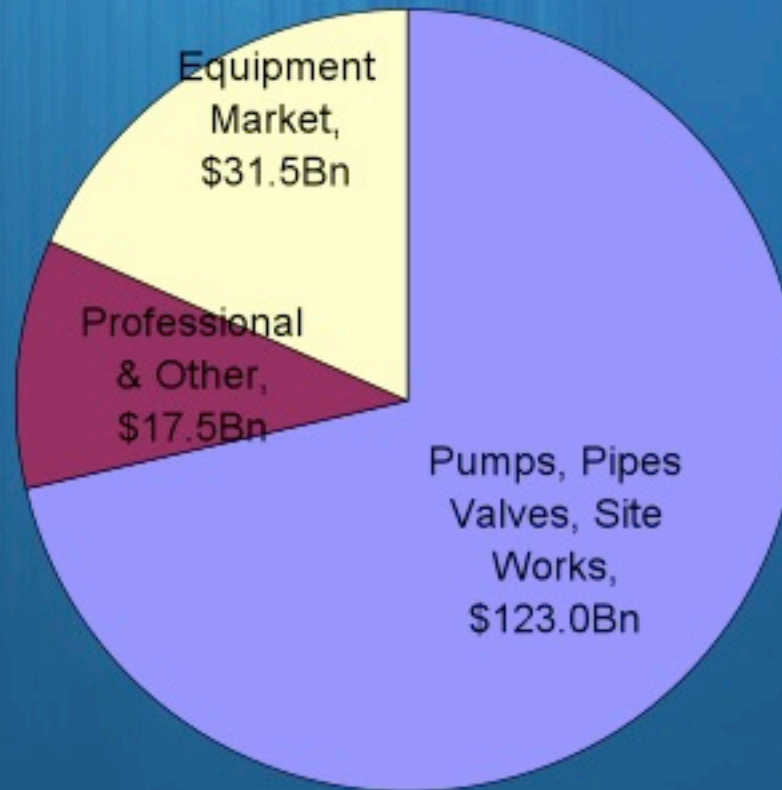
Global Water Utility Market: \$354Bn



Global Water Industrial Market: \$23Bn



Global Water Capital Expenditure: \$172Bn

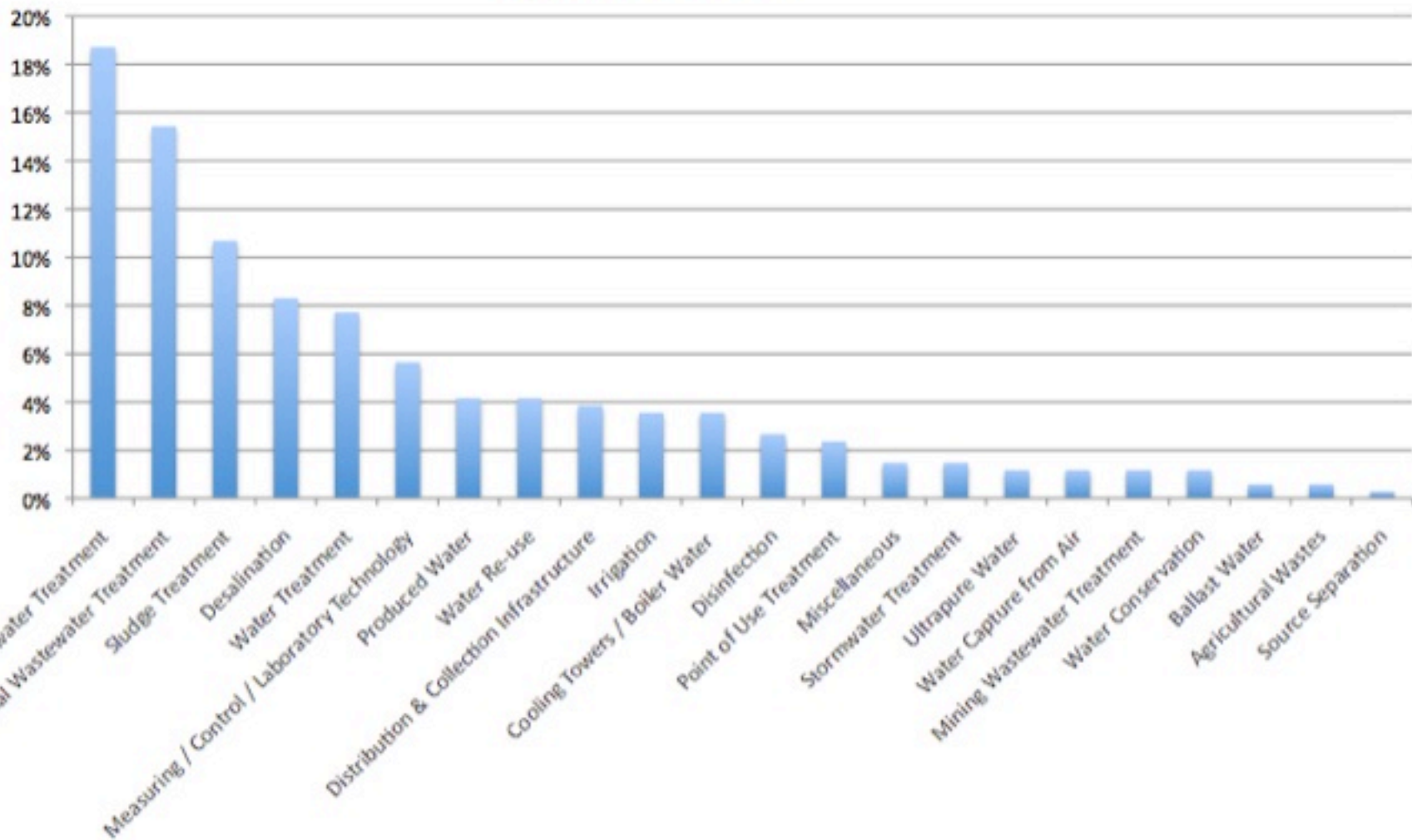


What Technologies are we likely to see?

- Technologies that deal with water issues locally
- Technologies that use 'butter knives' instead of chainsaws
- Technologies which provide water services, without using potable water, or using less water

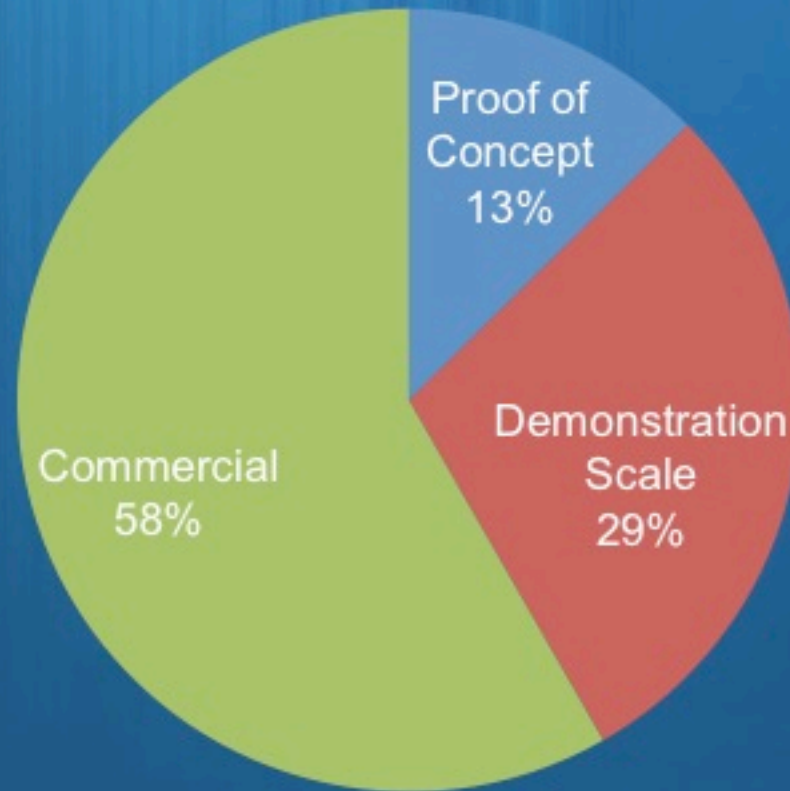
BlueTech Tracker Innovative Companies: Application Area

Percentage of Companies in the Tracker

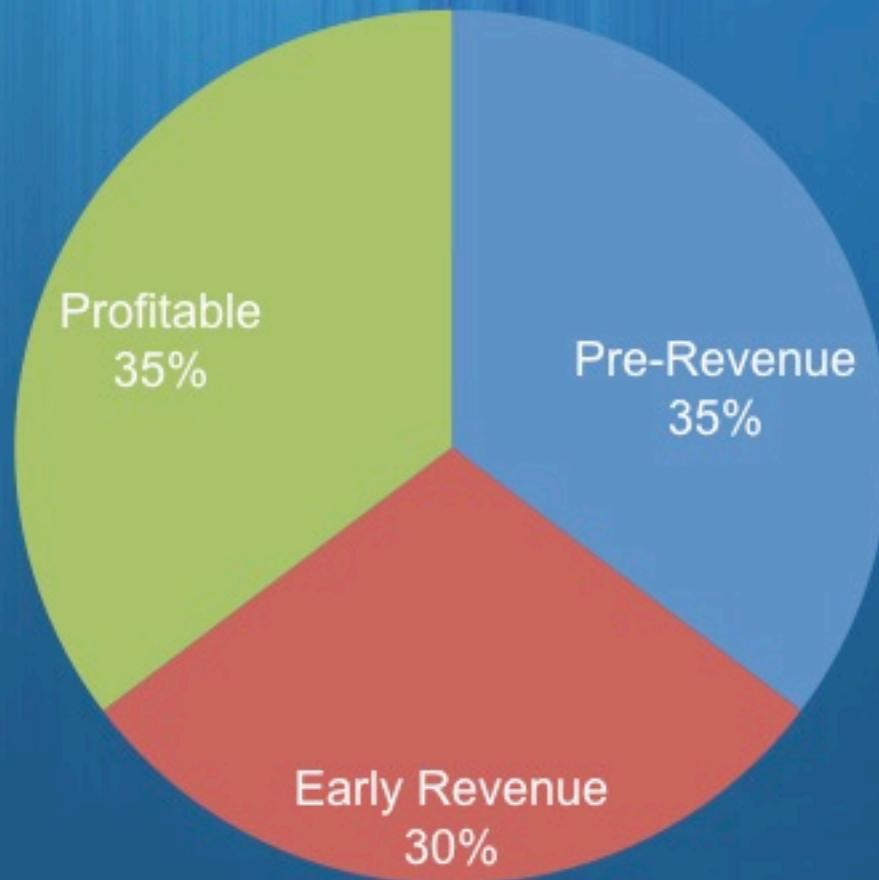


Application Area

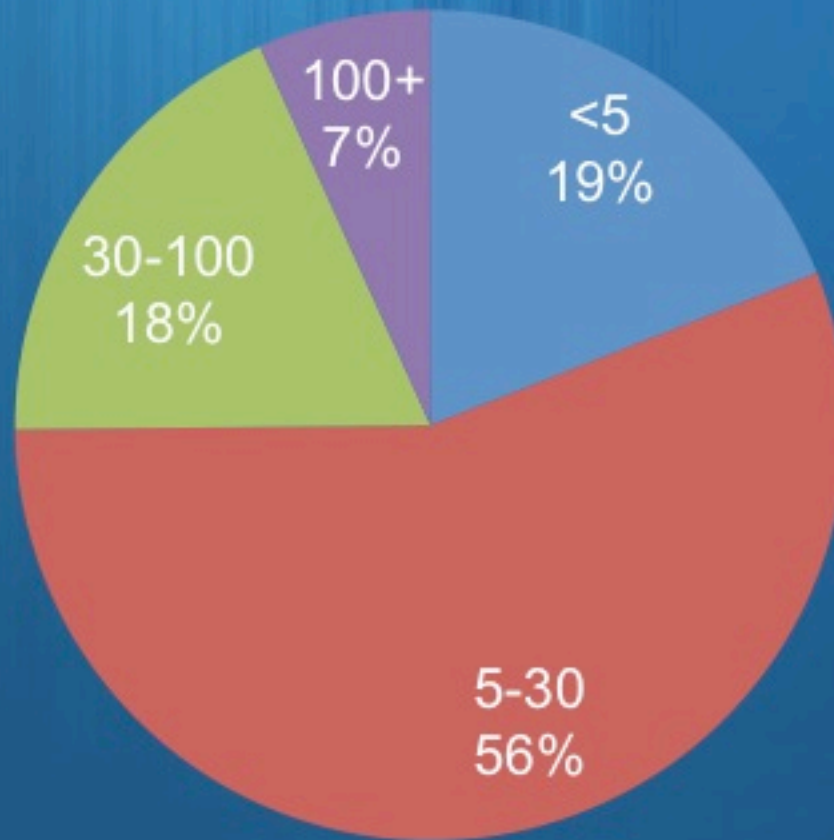
BlueTech Tracker Companies: Technology Development Stage



BlueTech Tracker Companies: Company Revenue Stage



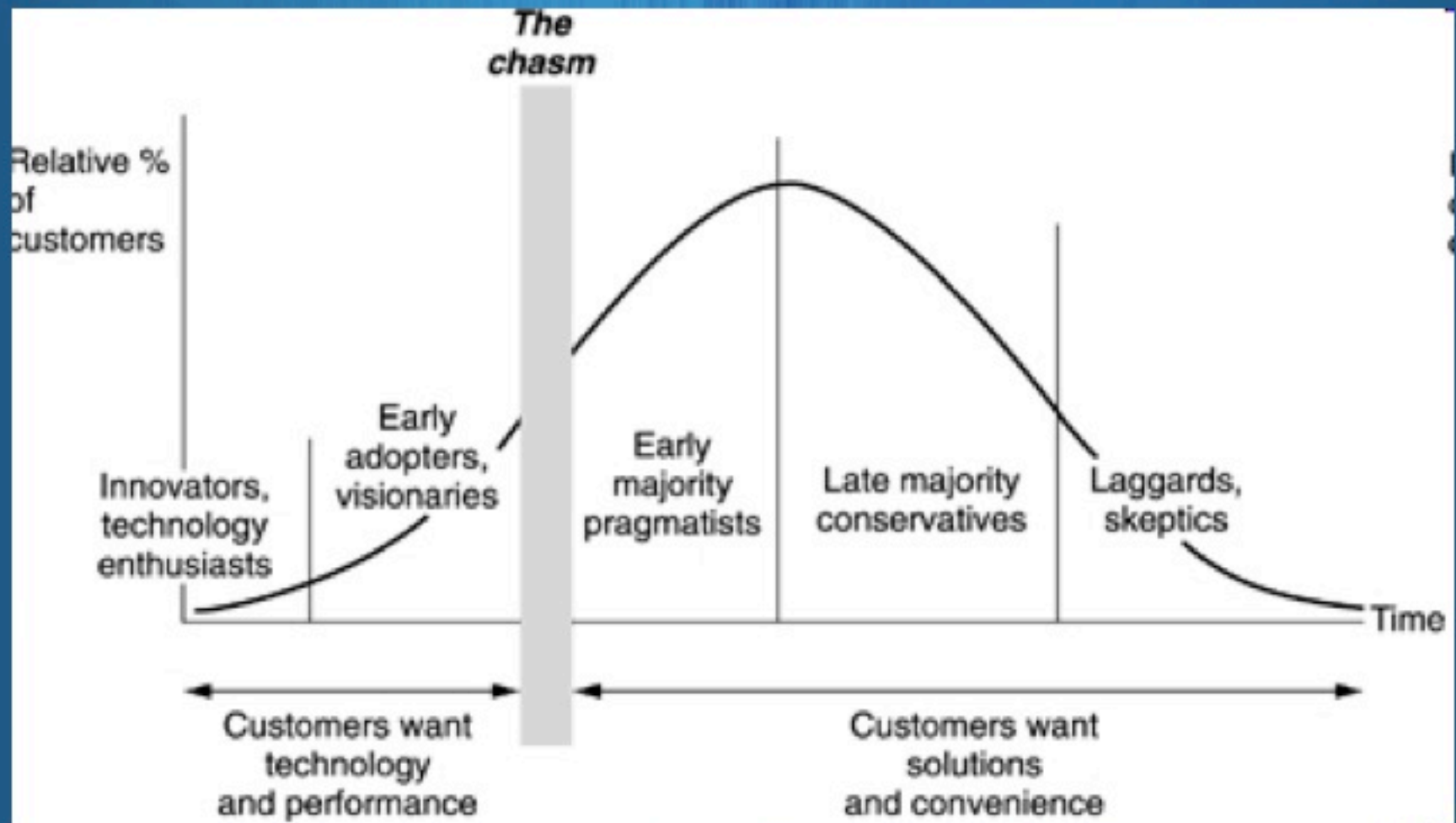
BlueTech Tracker Companies: Number of Employees per Company



How is the water technology market likely to Change?

- Pressures are driving early adopters
- New technologies will then move to the 'Early Majority' section of the market
- Overall the rate of adoption of new solutions will accelerate

Technology Adoption Curves



Straws in the Wind

- Increase in Research:
 - *Up 30% each year between 2000 & 2009* (Elsevier)
- Increase in Patent Filings
 - Desalination Technology Patents in 2010 almost double those in 2005 (O2 Environmental)
- Investments and Acquisitions
 - 2009- record high, 50 deals, 60% early-stage (Cleantech)
- Water Centres for Excellence
 - Proliferating at an alarming rate
- Water Conferences!

BlueTech Tracker

To sign up for our free newsletter:

www.BlueTechTracker.com

Europe:

Phone: +353 21 240 9133

Unit 1201, City Gate Mahon, Cork, Ireland

www.o2env.com

North America:

Tel: +1 604 676 3581

15th Floor, 701 West Georgia
BC, V7Y 1C6, Canada

www.o2env.com

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Water Technology Market Intelligence

BlueTech Tracker provides intelligence on water technology innovation. We are focused on what is changing, how new approaches, new technologies, and new needs, are re-shaping the water technology market.



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