



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

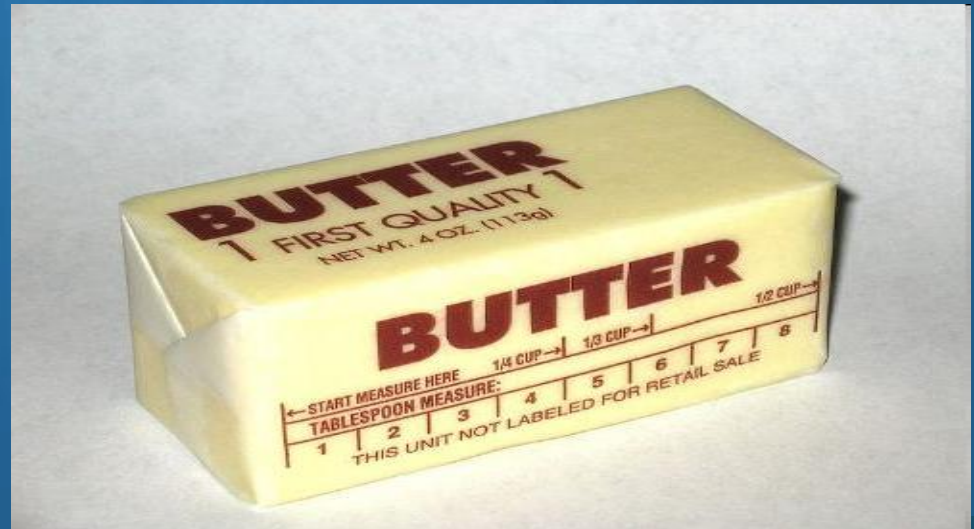


Brave Blue World

Water is a Local Issue



Re-thinking Water Systems Efficiency



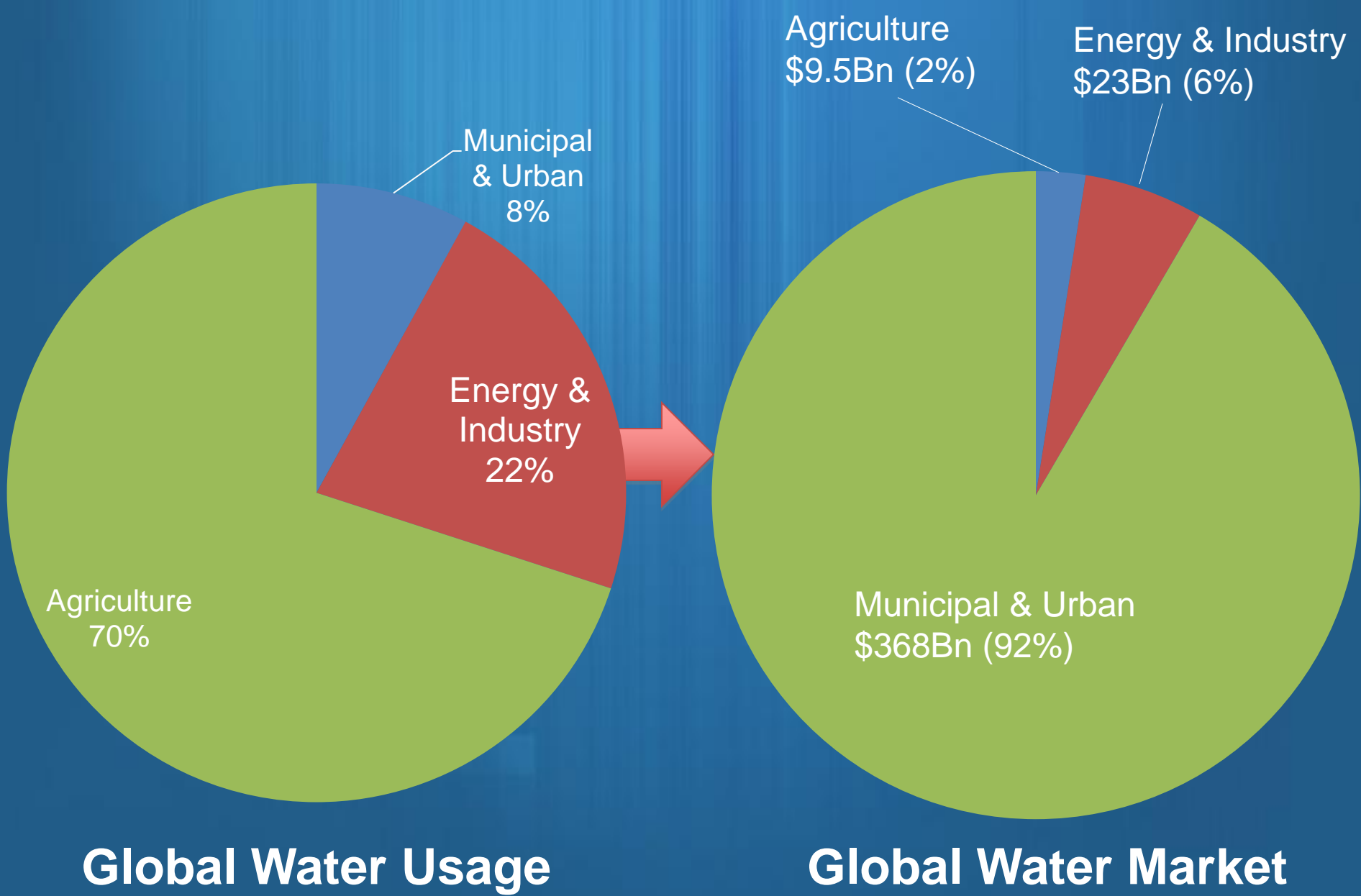
Providing water services... ...without water



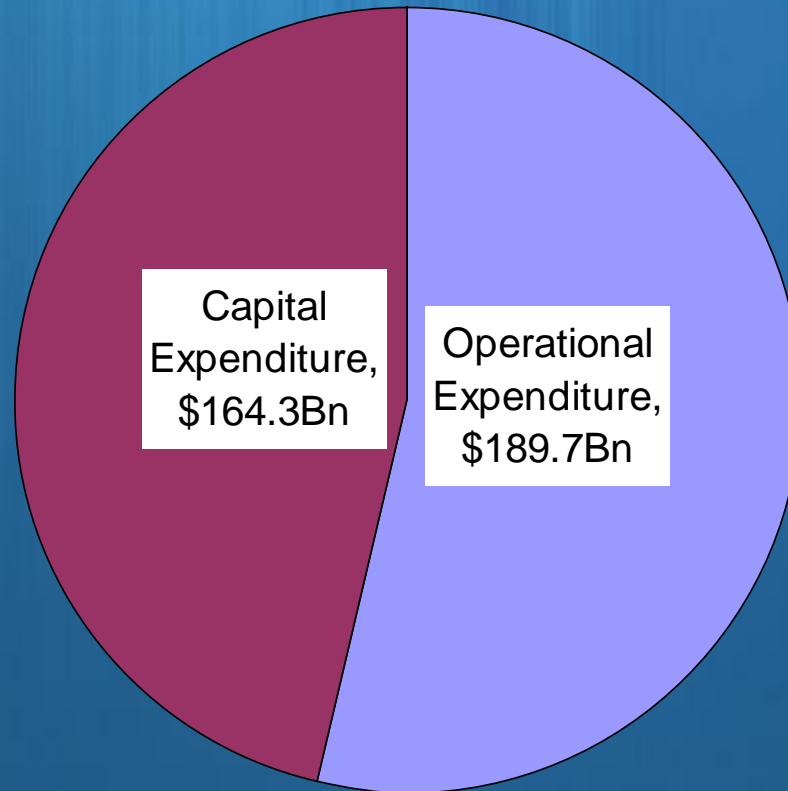
Global Water Use

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

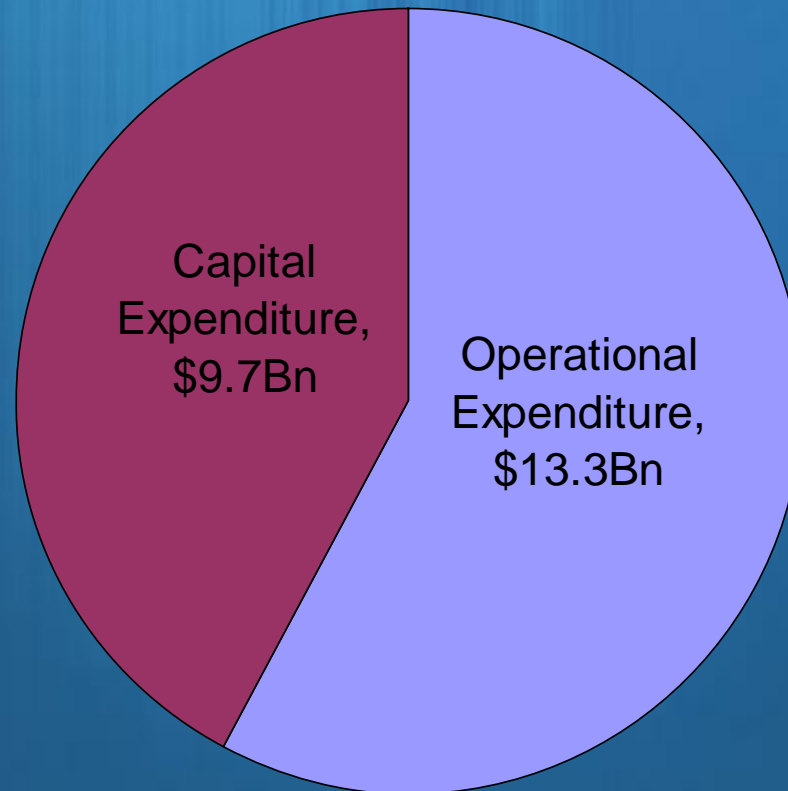




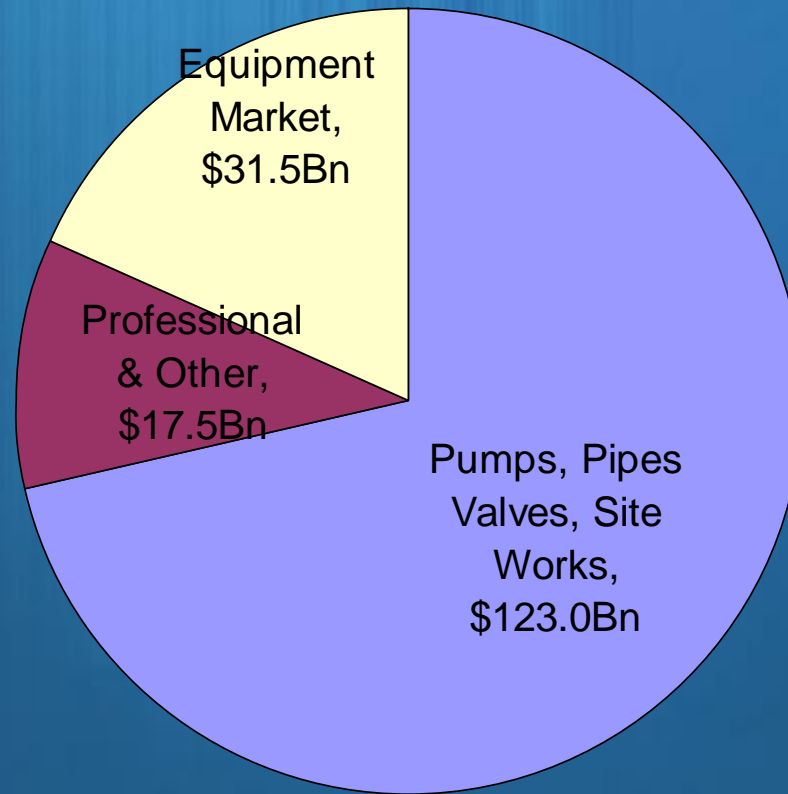
Global Water Utility Market: \$354Bn



Global Water Industrial Market: \$23Bn



Global Water Capital Expenditure: \$172Bn

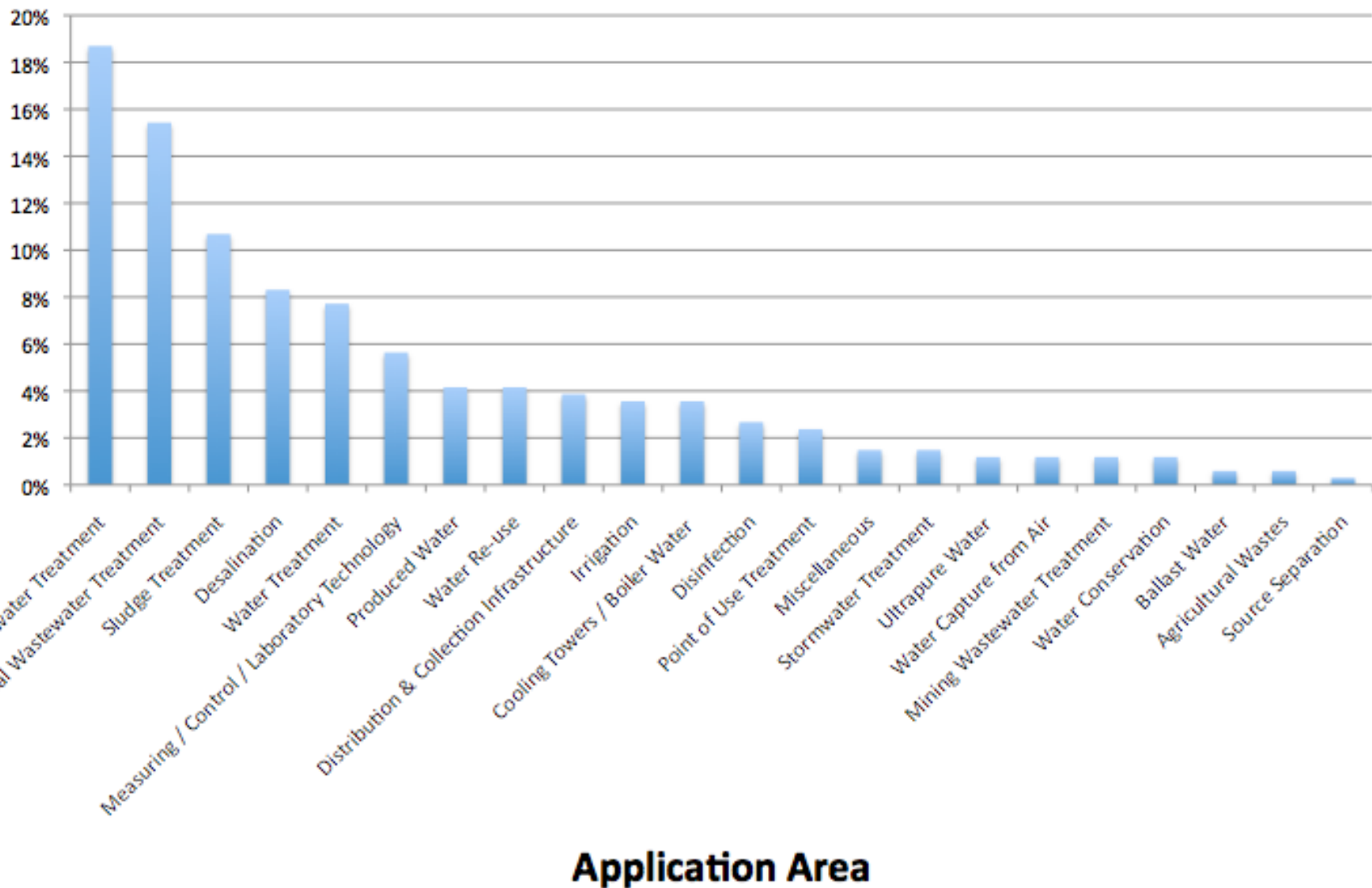


What Technologies are we likely to see?

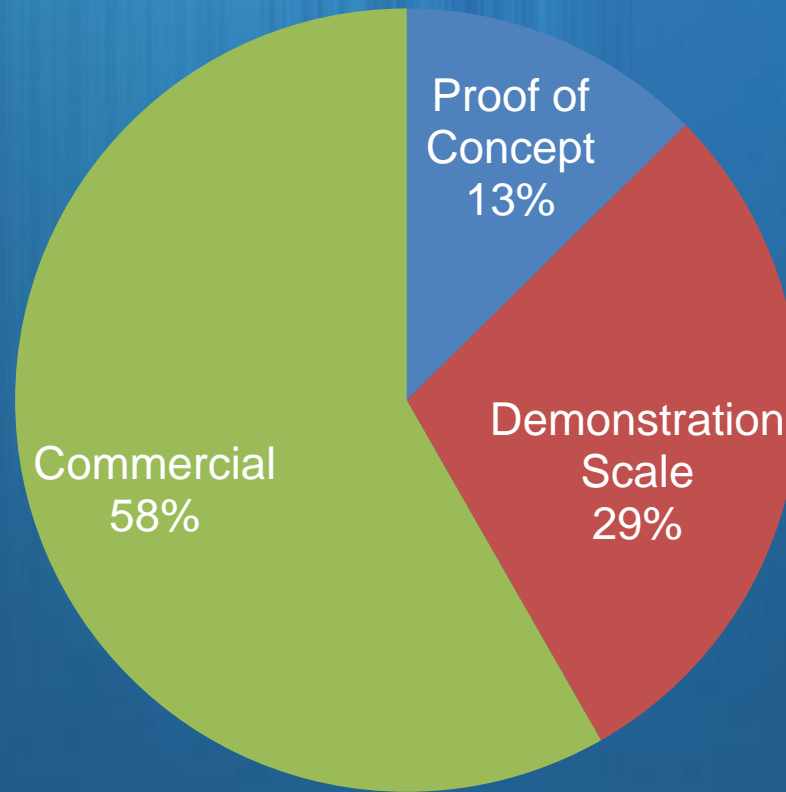
- Technologies that deal with water issues locally
- Technologies that use 'butter knives' instead of chainsaws
- Technologies which provide water services, without using potable water, or using less water

BlueTech Tracker Innovative Companies: Application Area

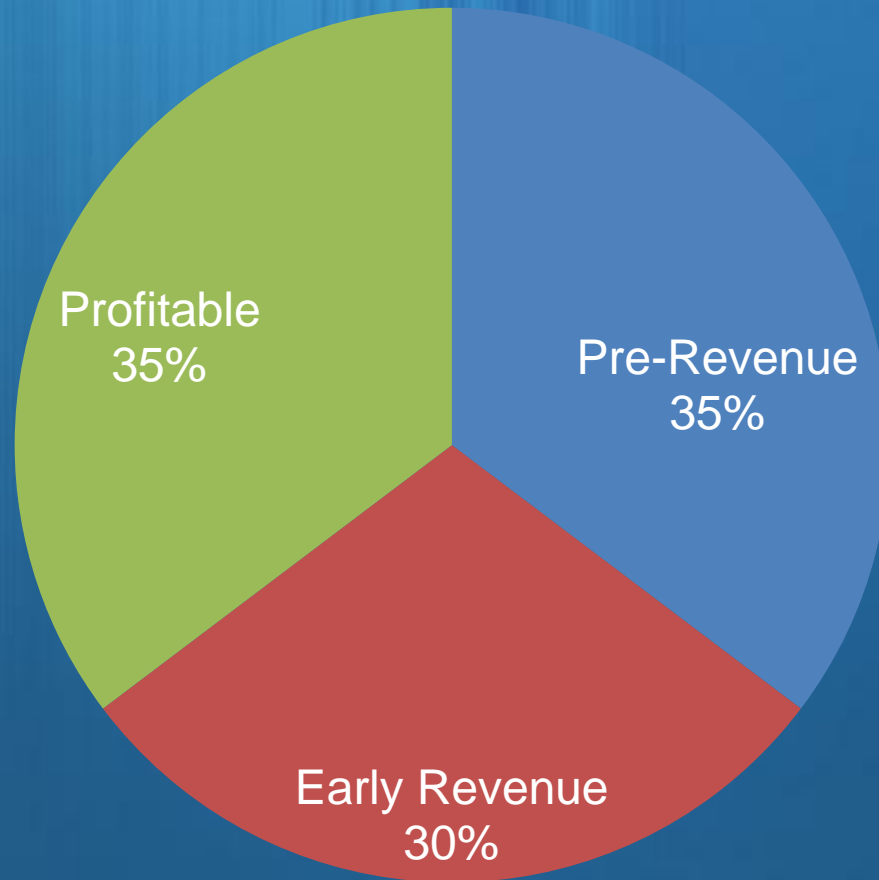
Percentage of Companies in the Tracker



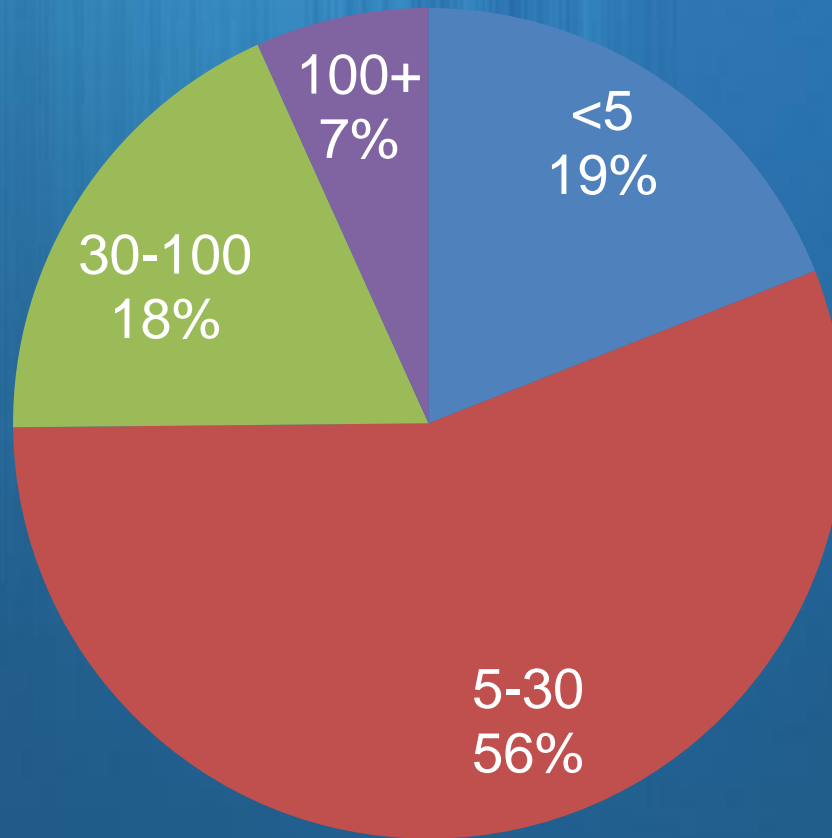
BlueTech Tracker Companies: Technology Development Stage



BlueTech Tracker Companies: Company Revenue Stage



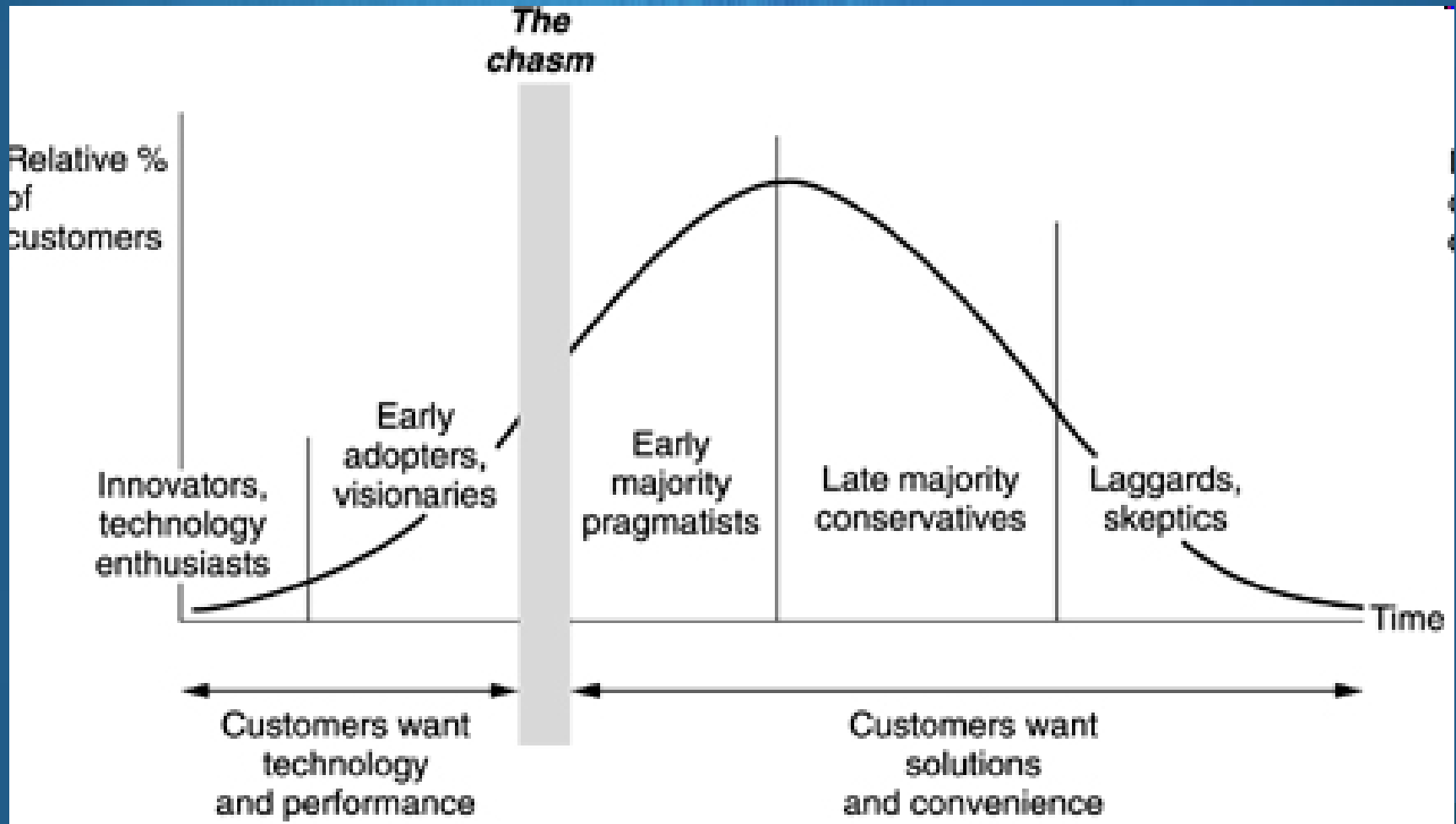
BlueTech Tracker Companies: Number of Employees per Company



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

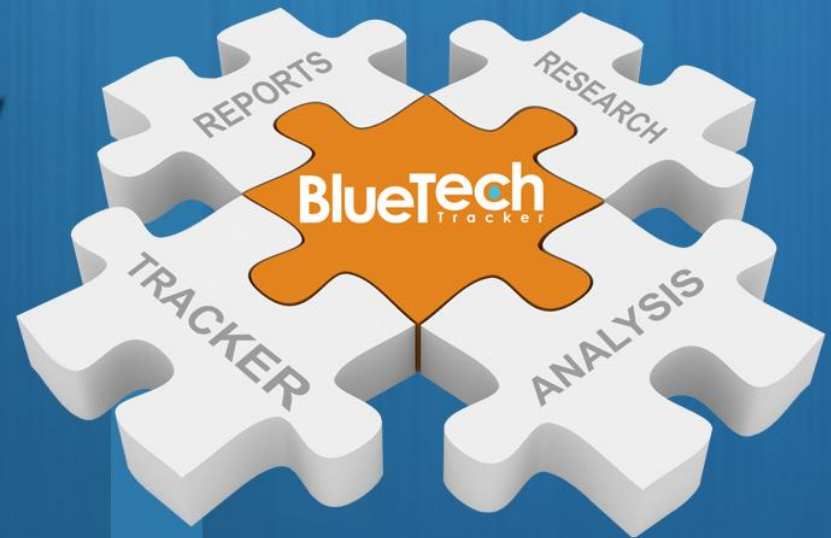
www.o2env.com



Real intelligence.
Real experts.
Real time.

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.



For Plans & Pricing visit: www.BlueTechTracker.com

a product of

O₂ Environmental Inc