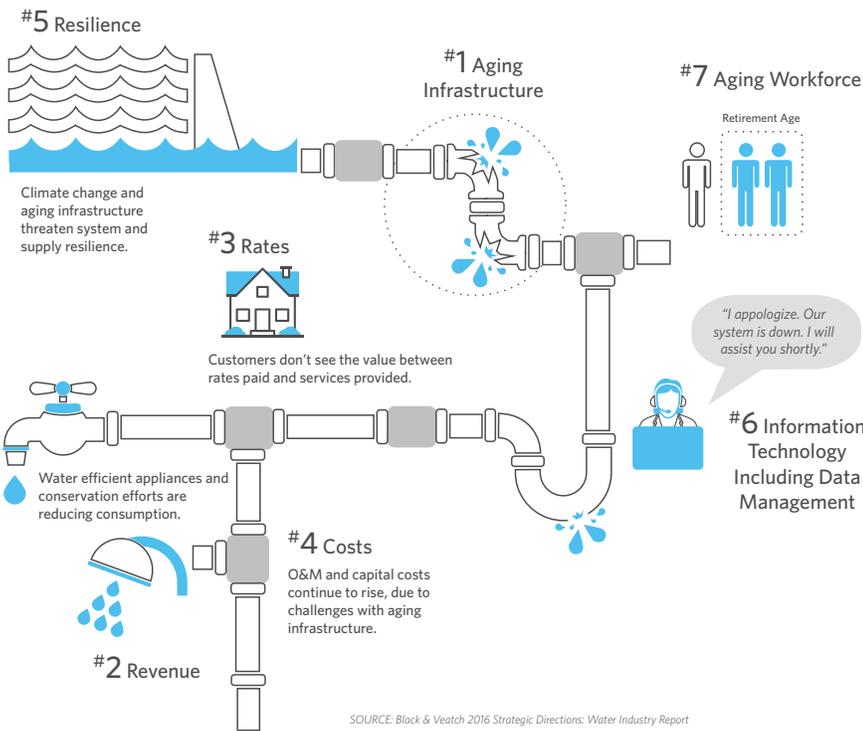


The Water Industry

Our mission is to collaborate, innovate and lead in creating sustainable and resilient water resources in the face of major changes in demographics and climate, delivered via an increasingly aging infrastructure.

As "Owner's Advisor" to Utilities, we will facilitate delivery of water resources through aligned project focus to these solutions.

TOP WATER INDUSTRY ISSUES



SOURCE: Black & Veatch 2016 Strategic Directions: Water Industry Report

KEY FACTS

- The U.S. wastes 6B gallons each day, or 14% of total use, because of leaky pipes in need of repair
- U.S. drinking water Infrastructure upgrades will total \$384B over the next 20 years
- Investment in resilient stormwater infrastructure is estimated at \$2.1B annually currently, and growing
- Average residential water bills have increased at three times the average rate of inflation driven by the need to meet regulatory requirements and infrastructure needs creating an affordability crisis.
- America's 2018 Water Infrastructure Act authorizes over \$6B in federal spending for water infrastructure.

THE CHALLENGES

- Conservation programs are reducing water demand and revenue while costs for water services are increasing
- Extreme weather events raising awareness of sustainability and resilience as key issues
- Rising rates challenging affordability, drives need for public awareness of the value of water systems and services
- Regulatory uncertainty from political turmoil
- Need to influence customer behavior pointing to better customer engagement
- Increased need for capital and asset management to replace aging infrastructure

MC SOLUTIONS

Coordinated Market Solution	Offering/Project Focus
Connected Enterprise	AMI Strategy to-Operations
	Security Risk Assessments
	EADM Solutions
New Water Economy	Customer Meter-to-Cash Products and Services
Capital Efficiency	Rate Studies and Independent Engineering Reports
	Storm Water Assessments