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MARKET INSIGHT – TABLE OF CONTENTS

Xylem Smart Water Strategy Breakdown: The Creation of a Market Leading Portfolio

July 2018

Summary

Background

Data driven "smart water" solutions are gaining traction with municipal utilities and industrial companies, which see data and analytics as critical tools for overcoming the age-old issue of aging water infrastructure and sustainability. At the root of this change is mounting pressure on municipalities to do more with less, financially, while industrial firms seek risk mitigation and bottom-line efficiencies.

The ubiquity of more advanced asset management and operation solutions have already begun to reshape critical infrastructure landscape, and the water sector, more broadly, is no exception. With more than US$2.9 trillion of municipal assets under management in 31 developed markets, alone, a growing roster of water-focused vendors are positioning to seize on this opportunity and more.

This Market Insight, which draws from Bluefield's *Digital Water Insight Service*, analyzes Xylem Inc.'s emergence as a leader in the smart water sector, while framing the market opportunities influencing the company's migration towards smart infrastructure solutions.

Since 2015, Xylem has made a series of strategic acquisitions in smart water, recasting itself as a diversified water infrastructure technology and services company. The company has executed seven smart water related acquisitions– totaling over US$2.19 billion in disclosed deal value – including a flurry of activity in the first quarter of 2018.

Smart water can be broadly defined as a group of emerging technological solutions that help water managers operate more effectively, while harnessing state-of-the-art hardware and software. This provides increasing levels of system intelligence, visibility, automation and control and enhances customer service through new channels of engagement. These technologies are increasingly being delivered via new business models, like software-as-a-service (SaaS), or through the cloud.

Mapping Company Strategies & The Competitive Landscape

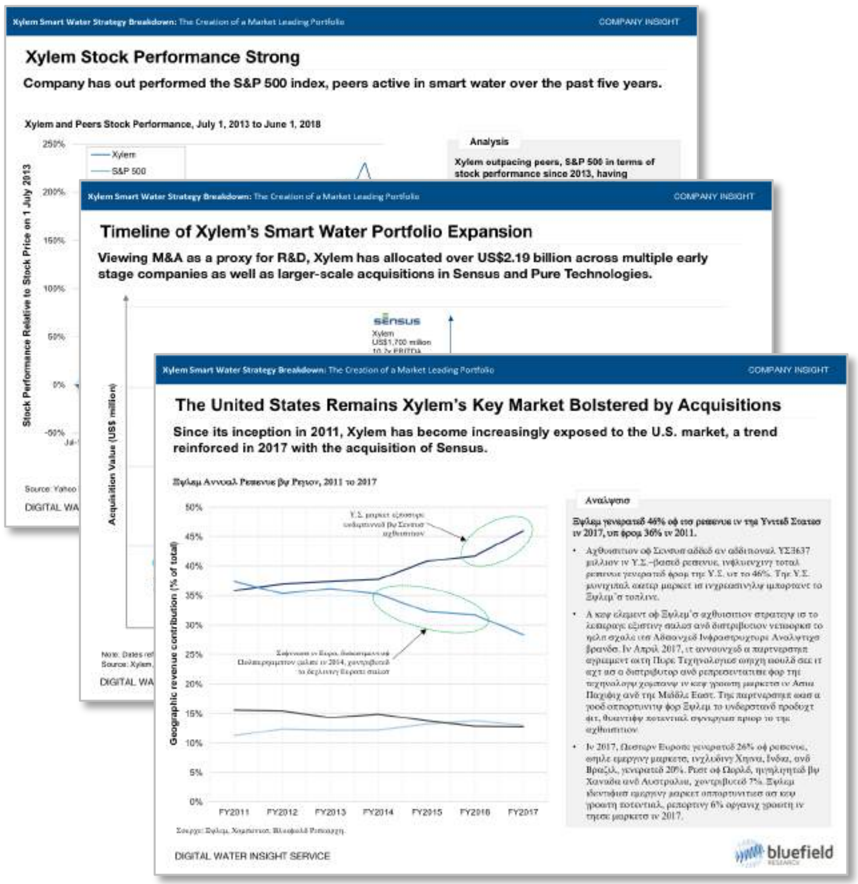

Table of Contents

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Xylem Smart Water Strategy Breakdown: The Creation of a Market Leading Portfolio

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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 strategies.

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