

# Smart solutions in water markets



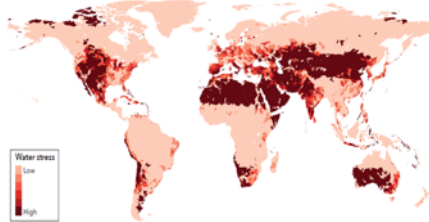
# An emergency situation loudly voiced by most stakeholders

- 📍 Urbanization
- 📍 Growth of population
- 📍 Emerging economies driving needs in drinking and waste water
- 📍 Continued industrialization
- 📍 Needs in agriculture
- 📍 Environmental awareness

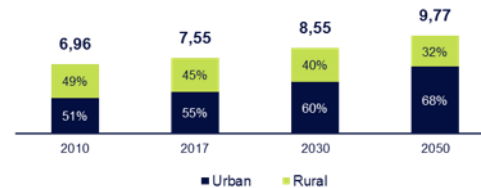


- 📍 Water shortages / hydro stress
- 📍 Radical disasters
- 📍 Care for new pollution

Water stress by region



Urbanization proportion evolutions (bn)



**Technologies will play a key role and new strategies based on reuse or desalination become necessary**

# Needs of water in agriculture : market overview



**~10bn**  
by 2050



**-17%**  
Farmland ha per  
capita by 2050



**+16%**  
Protein intake per  
capita by 2024



**-17%**  
Yield reduction due  
to climate change  
by 2050



**+60%**  
Productivity increase  
required to feed the planet  
by 2050

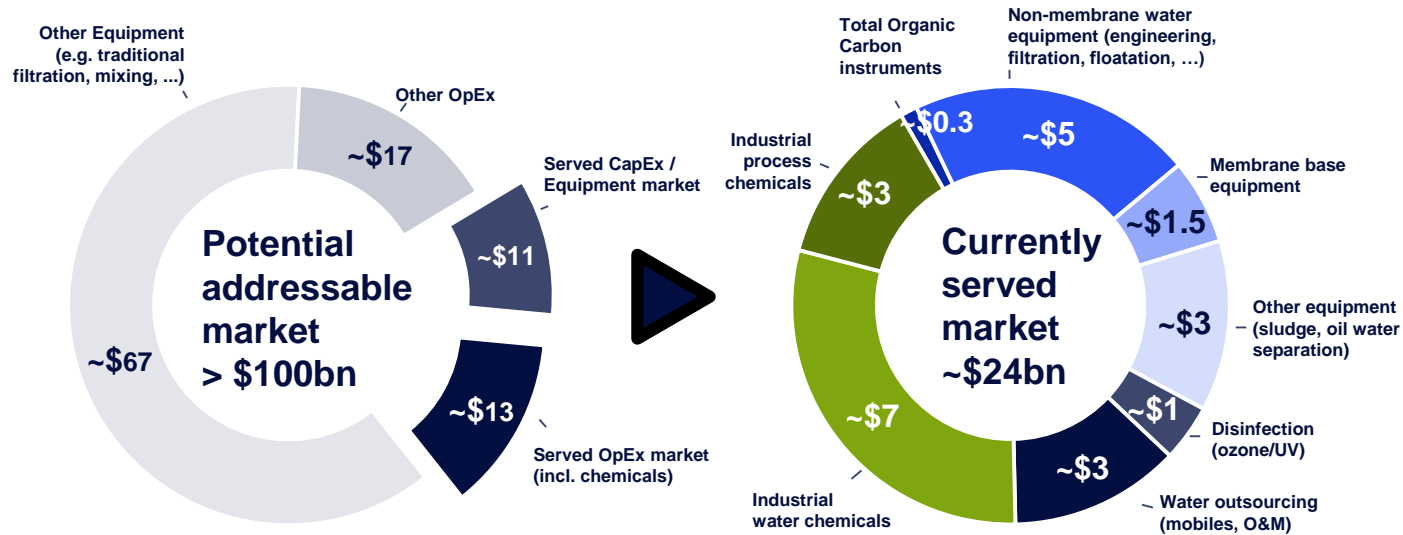


Environmental protection

**The agricultural market will face and respond to major challenges in the long run**

# Industrial water market is booming...

A large addressable market leaving room for further penetration



**A growth market with significant potential**

# Advanced Solutions: what for ?

📍 Advanced solutions to support regulated & non-regulated business in municipal market

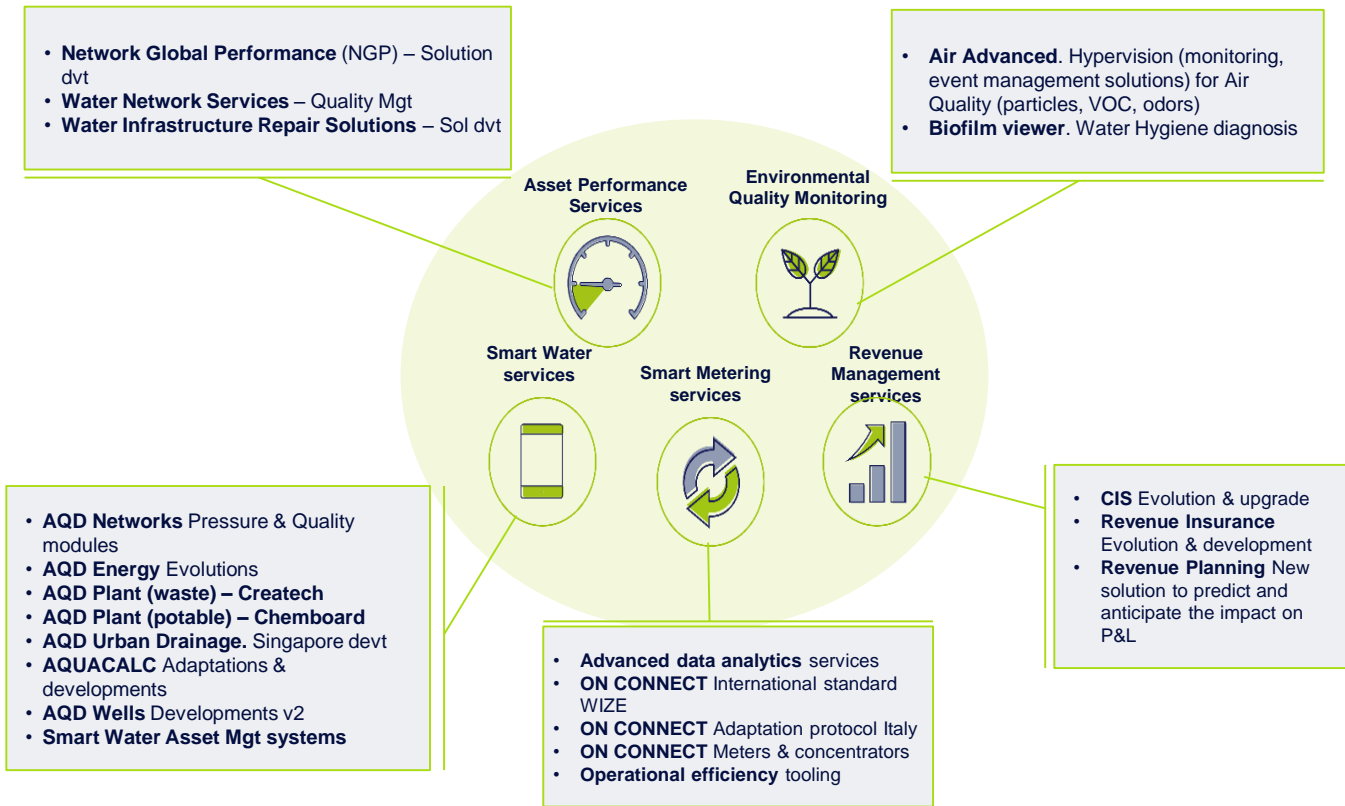
1. Performance based contracts → network efficiency
2. Maintenance programs → filters, meters, tanks
3. Digital based services → hypervision system

📍 Digital tools solutions for industrials allow to:

- reduce operating risk
- improve efficiency
- Leverage existing know how

**Advanced solutions transform O&M and services sector  
for the benefit of operators & clients**

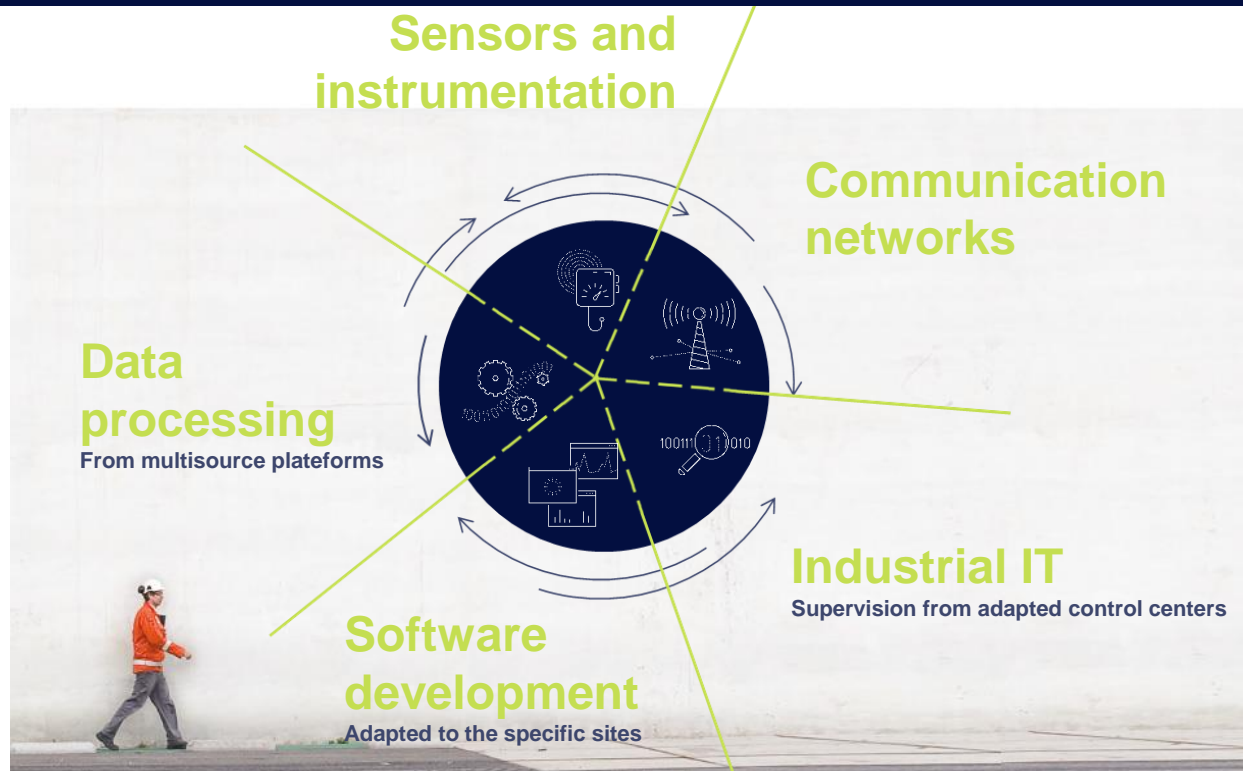
# Portfolio of advanced solutions in municipal water market



Optimizing the performance: a necessity

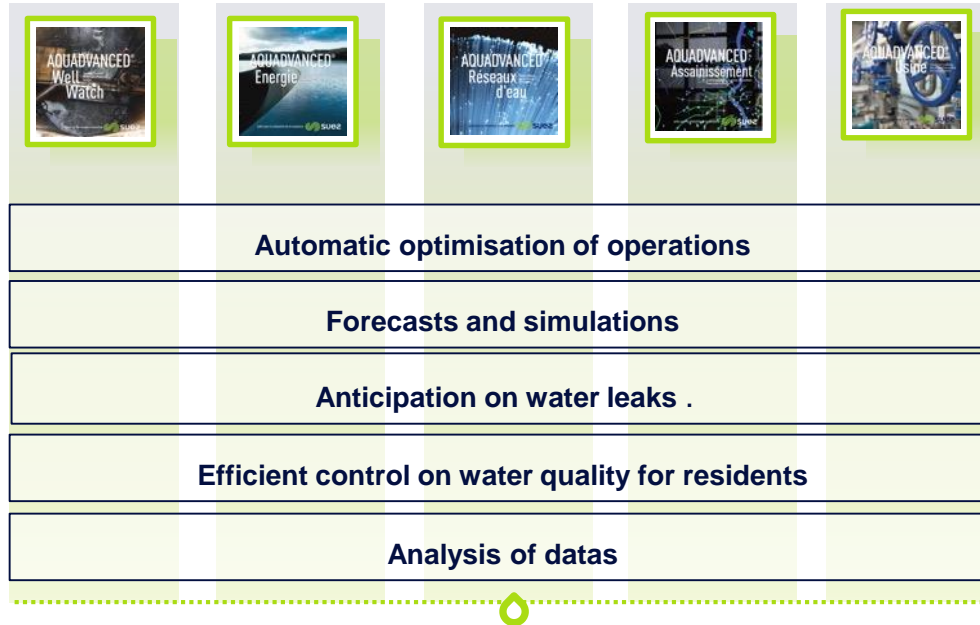
# A large and fast moving market estimated at 18bn€

Objective : to master all the value chain : management of « big data », connected items, digital solutions, networks pressure and quality...



A crowded and technology driven market with innovative offers

# First illustration: AQUADVANCED®...



**An innovative modular tool optimizing performance indicators relating to drinking water networks (flow rate, pressure, quality)**



## Bordeaux

diminished by more than 75% water which was rejected in la Garonne and thus protects the quality of the river



AQUADVANCED® waste water

## The region of Versailles

saves 200 000 m3 of water by better managing 1 000 km of network with a real time system helping to detect leaks and pollution



AQUADVANCED® network

## Northumbrian Water

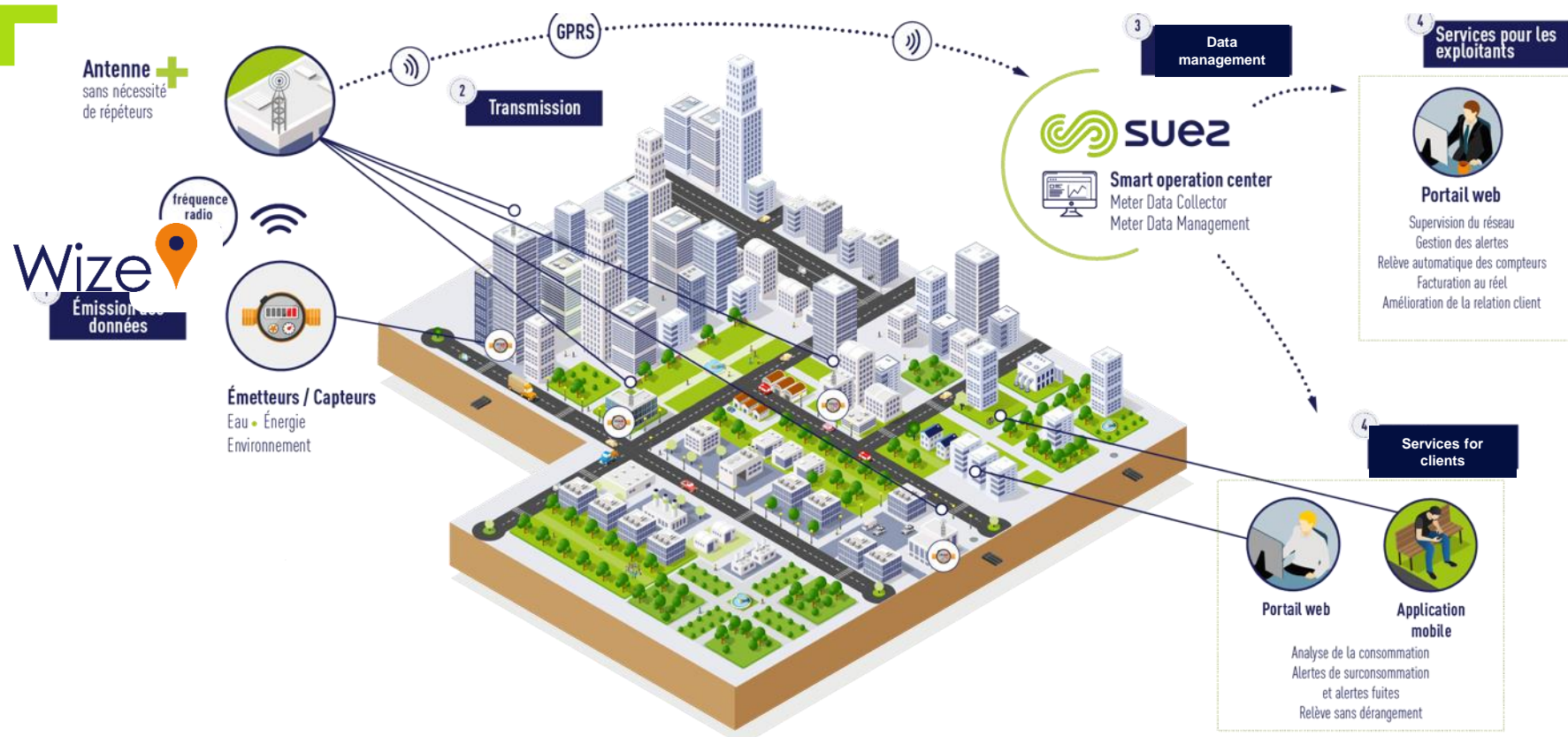
1 million d'euros of savings per year with savings in energy consumption



AQUADVANCED® Energie

Key references to be duplicated

# Second illustration: ON'connect™ from sensors to services...



## Water Service Corporation de Malte

Manages 250 000 smart meters which help to manage the scarcity of water and to control the flows



ON'connect™ metering

## Dunkerque

Propose services to its residents to limit the water consumption and reduce their carbon footprint



ON'connect™ coach

## Nice

Use smart meters to be able to keep seniors at home while checking in real time any issue on change in behaviour (consumption)



ON'connect™ generation

# Next step: The smart and sustainable city of tomorrow



## 📍 Dijon métropole, France

- an unprecedented smart city project based on remotely managing urban equipment of all the metropolis' 23 municipalities from a connected control centre.
- It processes around 630 daily calls received at the telephone portal dedicated to citizens'
- It manages the urban equipment of the metropolis 23 municipalities such as traffic lights, street lighting, CCTV or road services

1

Unique connected center

65 %

energy savings at the end of the contract

205

geolocated vehicles and 130 equipped with radios communication sets

+ 34 000

Renovation with 100% LED lighting units

# Industrial water and digital platforms

## Workforce & supply chain optimization

- Increased customer collaboration
- Faster proposal generation
- Elevated on-site service
- Streamlined fulfillment



## Customer engagement

- 24/7 digitized access
- Customized solutions
- eCommerce

## Asset performance management

- Utilize data and advanced analytics
- Optimize performance of customer assets
- Automate data collection and reporting

**Digital tools to enhance productivity and maximize value**

# Conclusion

- **Future generations and roll out of new technologies will play a key role in addressing the water issues of our century**
- **Reconciliation of the industrial challenges and environmental protection will be at the heart of the equilibria world wide**
- **Various solutions and underlying business models will have to be available to tackle all needs**
- **Will to provide access to basic needs to everyone and development of green investments**
- **Change in water value perception ; this resource is very much valuable and has a price**