



Export Opportunities in International Water Markets

The Westminster Conference Centre, 1 Victoria Street, London, SW1H 0ET

USA WATER SECTOR OPPORTUNITIES CAPITAL IMPROVEMENT PROGRAMS

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USA Water Sector Opportunities Capital Improvement Programs

What are the USA Water Sector Opportunities?

- Mainly Public Water Sector Infrastructure: Renovation, Restoration, Repairs, New Build
- Municipal Water Authorities & Agencies, Public Works Departments, Private Operators
- USA Water Sector Opportunities CIP is a Campaign not a single project
- Capital Improvement Programs/Plans Comprise Multiple Projects over Multiple Years across Multiple US Regions

What is the Value?

- Ranging from ~\$1 Billion to \$25 billion; multi-year ranging from ~1 to 20 years
- Potential worth to British firms estimated at 1% of contracts are winnable

What are Our Activities?

- Webinars about specific Capital Improvement Programs
- Collaboration with Executive Infrastructure Club events in US Regions: “Bringing the UK to the US”
- Activities for UK & US Water Technology Companies including World Water-Tech Investment Summit 2017 in London: “Bringing the US to the UK”
- Missions to AWWA ACE June 2017 in Philadelphia
- Clean & Cool Mission, June 2017 in San Francisco
- WEFTEC, September 2017 in Chicago

The U.S. Water Industry: 2010-2015: \$161.5 Billion

Water Industry Segments	2010 (\$mil)	2011 (\$mil)	2012 (\$mil)	2013 (\$mil)	2014 (\$mil)	2015 (\$mil)	2015 Growth	2016-17 Forecast
Water Treatment Equipment	10,890	11,130	11,440	11,900	12,400	12,670	2.2%	3-4%
Delivery & Infrastructure Equipment*	11,750	12,150	12,550	12,900	13,370	13,640	2.0%	2-3%
Chemicals (Bulk & Speciality	4,290	4,450	4,670	4,900	4,920	5,020	2.1%	0-2%
Water Equipment & Chemicals	26,930	27,730	28,660	29,007	30,690	31,330	2.1%	2-3%
Contract Operations	2,910	2,990	3,080	3,180	3,240	3,320	2.6%	2-4%
Consulting & Design Engineering	9,430	9,820	10,300	10,740	10,430	10,790	3.5%	3-5%
Maintenance Services*	1,980	2,010	2,050	2,090	2,200	2,200	2.4%	2-3%
Water & Wastewater Services	14,320	14,820	15,430	16,010	15,820	16,310	3.1%	3-4%
Instruments	1,140	1,190	1,240	1,290	1,370	1,450	5.8%	5-7%
Analytical Services	920	950	980	1,010	1,000	1,020	1.5%	1-2%
Wastewater Treatment Works	45,220	47,390	50,870	53,160	55,860	57,590	3.1%	3-5%
Water Utilities	42,680	44,320	50,770	52,600	51,980	53,770	3.4%	2-4%
Total Water Industry*	131,210	136,400	147,950	153,770	156,720	161,470	3.0%	3-4%

SOURCE: Environmental Business International, Inc., San Diego, CA. * Delivery Equipment is pipes, fixtures, pumps and valves for treatment and delivery; Maintenance Service is mostly industrial & municipal plumbing contractors performing routine maintenance on lines and stations. This definition of the water industry does not include consumer products.

USA Water Sector Opportunities

Sacramento Regional County Sanitation District – EchoWater Program

- \$1.5-billion - \$2.1-billion wastewater improvement program comprising 12 major projects
- Design Phase: 2015-2019; Construction Phase: 2018-2023

Santa Clara Valley Water District – Expedited Purified Water Program

- \$640 million - \$1.6 billion water supply program 2016-2028
- Public Delivery Method: Design-Build & Design-Bid-Build; Public-Private Partnership (P3) Delivery

City of San Francisco Sewer System Improvement Program (SSIP)

- \$7-billion, 20-year infrastructure upgrades and renovation of pipelines, pump stations and treatment facilities
- Design-Build and Public-Private Partnerships

City of Chicago Capital Improvement Program

- \$3-billion replacement, rebuild and reline water mains, sewer mains and sewer structures

City of San Antonio Capital Improvement Program

- \$1.85-billion water and wastewater infrastructure improvements and upgrades

City of Houston Capital Improvement Program

- \$1.33-billion, four-year design-bid-build program with many small projects, rather than a few large projects

Miami-Dade County, Florida Capital Improvement Program

- \$12-billion, 15-20-year design-build and P3 opportunities
- Atkins NA won a £10 million contract for P3 Advisory Services in 2015/2016

Summary of Qualifications

- Potentially need to partner with known and trusted local consultancies
- Need to demonstrate proven track record, with reference projects in the U.S.
- Need to have a local business and contracting license, insurance and bonding certificates
- Understanding the importance of networking at key events and getting to know key staff on the ground
- Be prepared before bidding to have a local business presence established
- Access for foreign firms is welcome, but a local preference for contracts is preferred
- Local labour preference varies, but exists with most authorities



Thank You!

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