

Session Introduction

9:15 - 10:30 am Morning Panel - Water Clusters: Building Capacity through Collaboration

Over the past few years, water technology "clusters" have popped up across the globe, fuelled by the promise of a \$560 billion global water market. How are these clusters benefiting economic growth, innovation adoption, and environmental protection? Are they really lending to a more cohesive sector? What are the current goals and models for these clusters? In this session, learn how clusters from Canada, the United States, and Europe are making a difference.

Meet Our Panelists



Peter Gallant, President and
CEO, WaterTAP
(Ontario, Canada)

Hein Molenkamp, Managing
Director, Water Alliance
(Netherlands)



Bryan Stubbs, Executive
Director, Cleveland Water
Council (Cleveland, OH, USA)

Today's Questions:

Cluster Organizations: Why? How? & What?

- Hein, Bryan and Peter will present brief (10 minute) overviews of their respective Innovation cluster organizations – the “Why, How and What”
- What keeps cluster leaders awake at night?
- Panel discussion around the “value add potential” of these organizations.

Post-Panel Discussion Questions

- Are cluster/hub organizations really adding value to the sector?
- Are we effectively addressing key barriers to innovation in the water sector?
- Any thoughts as to how the water/wastewater sectors will evolve in the next 5 years?
- Audience questions / discussion.



WaterTAP
Technology Acceleration Project

WaterTAP: Ontario, Canada Developing a World-Class Water Sector Innovation Accelerator: Goals & Challenges

Dr. Peter Gallant
President and CEO, WaterTAP
Canadian Water Summit Panel
June, 2015

Building a World-Class Innovation Accelerator in Water

Why?

- Recognition of the unique and strategic value of water and wastewater in the municipal / national / global economy.
- To facilitate growth in what is a traditionally fragmented industry sector.

WaterTAP is unique:

- Incorporated by legislation – the Water Opportunities Act, 2010 (Ontario).
- Not-for-profit.
- Financially supported by the Province of Ontario during initial operating period (approx. \$1.5 million / year)

Ontario: By the Numbers...

950+

766

100

100+

8,000+

Ontario: Major Center for Water Innovation

950+ water related companies with **22,000** employees

766 water and wastewater facilities

100 technology incubators

100+ water related research institutes

8,000+ post secondary graduates in water related field each year

Diverse and multi-cultural population

Gateway to North, Central, South America

Majority of assets in close proximity

What do we do?

The 4 Pillars of WaterTAP

Pillar 1: Supporting Emerging Water Technology Companies

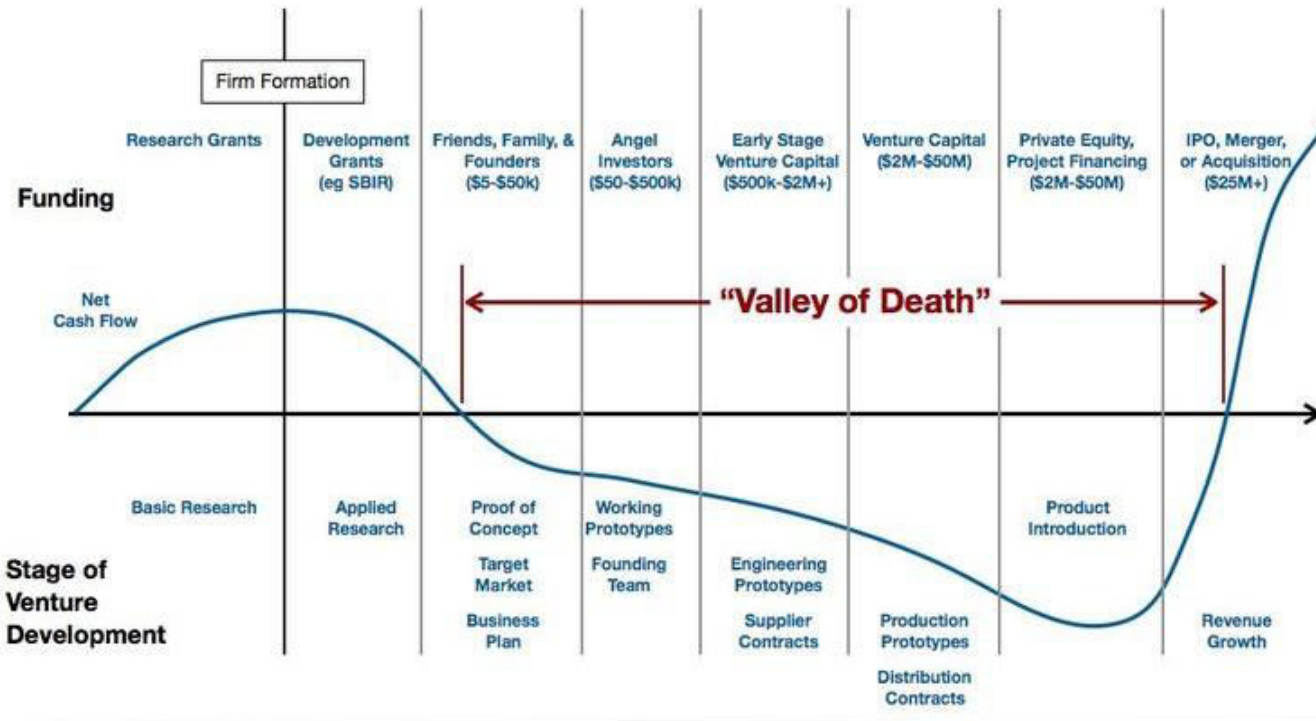
Pillar 2: Bringing New Water Opportunities to Ontario

Pillar 3: Leveraging Water as an Economic Growth Driver for Ontario

Pillar 4: Serving as a Trusted Advisor to Government

Pillar 1: Supporting Emerging Water Technology Companies

Water sector has a Significant Valley Of Death...

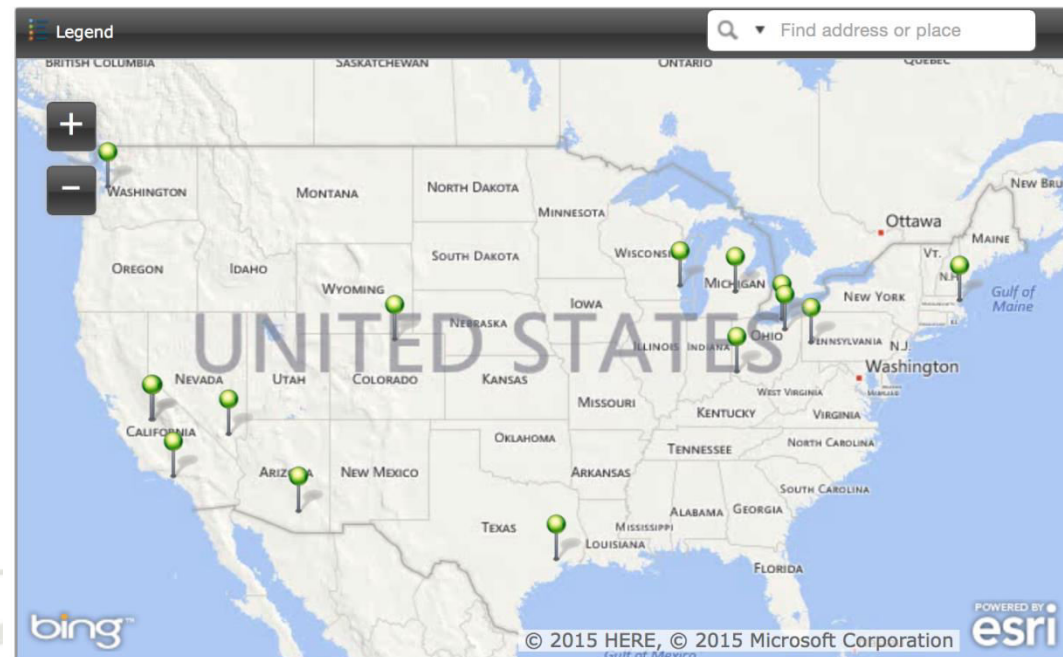


Pillar 2: Bringing New Water Opportunities to Ontario

- Make the case for foreign water technology companies to choose Ontario as their North American Base.
- Numerous “Cluster Organizations” emerging.
- How to differentiate?

Clusters Map

Click on the map below to locate U.S. environmental technology clusters.



Pillar 3: Leveraging Water as an Economic Growth Driver for Ontario

- Ontario has a lot of water (relatively!)
- Leverage water as part of supply chain risk management and infrastructure decision-making.
- **Translation:** get water-intensive industries to choose Ontario due to excellent track record in water supply, treatment, sustainability and water stewardship.



Pillar 4: Serving as a Trusted Advisor to Government

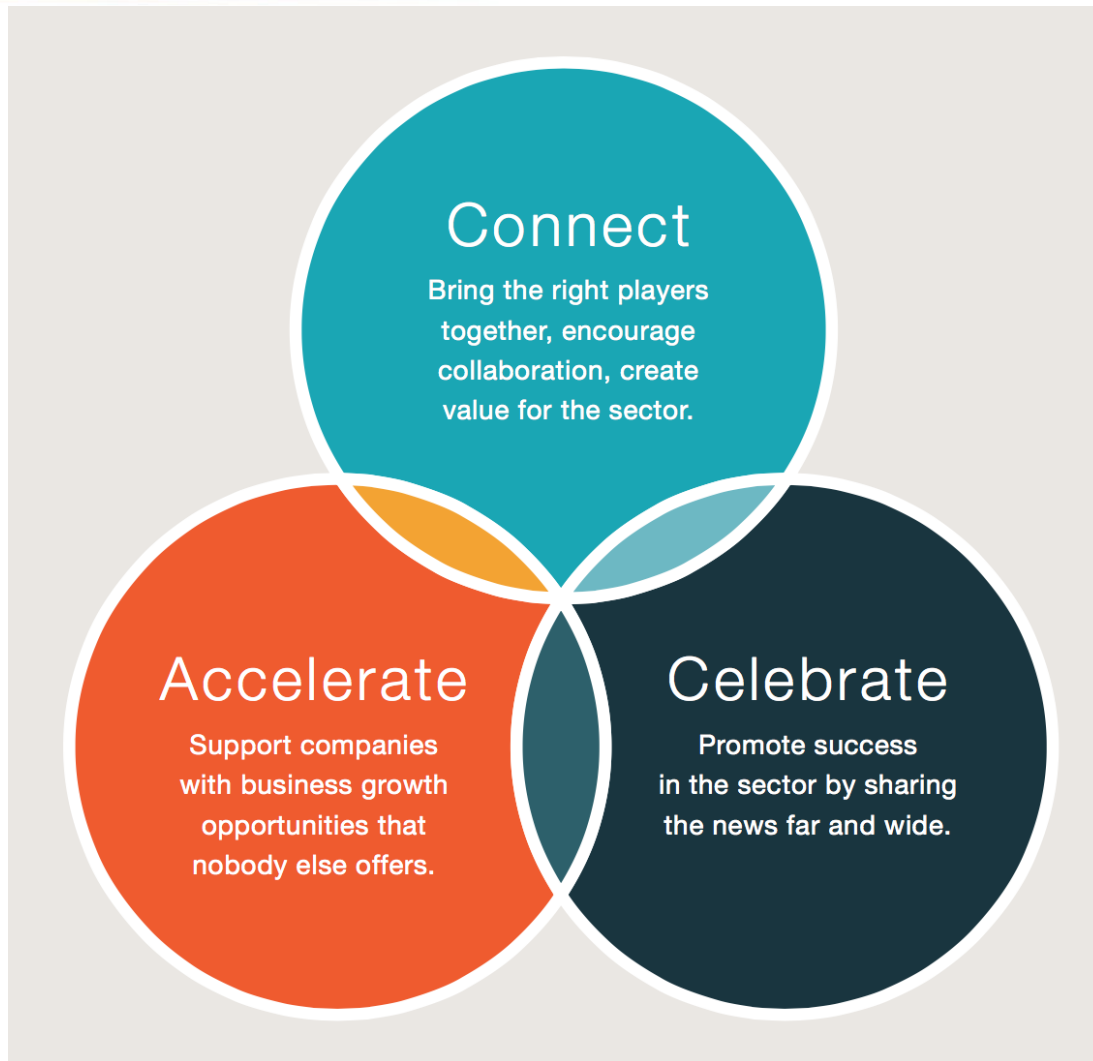
Act as the:

- **Trusted**
- **Highly Responsive**
- **Knowledgeable**

advisors to the Province (and Federal + Foreign Governments) on water policy and regulatory affairs.

Unique role / positioning of WaterTAP within the “water policy ecosystem” due to our unique relationship with government – created by legislation.

How do we deliver on our Value Promise?



How do we deliver on our Value Promise?

- Over 15 programs to support emerging water technology companies:
 - Executive education (university partnership).
 - Marketing and Business User Groups – share experiences and best practices
 - Embedded executive
- Host the World Water Tech North America Summit (again in 2015) – brings world-class water leaders together in Toronto.
- Thought leadership – leading/participate in sessions at 10+ major conferences worldwide.
- In 2015, launching enhanced Executive Support program to deliver **highly focused direct assistance** to emerging companies on strategic and tactical business planning and execution.

Measuring Our Impact

The Province's average
annual investment in
WaterTAP of

\$1.5 MILLION
has yielded

\$25 MILLION
in economic
value,

representing a

13 × return on
investment

WaterTAP Value Promise in Action

Making Deep Connections that Drive Real Business



“WaterTAP’s support at IWA has generated real business for MANTECH. We have several projects in the pipeline for the next year, and in the last two months we’ve had six orders for PeCOD™, five of which are from Europe. That’s a concentration of orders we didn’t previously have.”

Robert Menegotto | President and CEO, MANTECH INC.

Measuring Our Impact



Ontario companies that worked with WaterTAP experienced

54%

greater revenue growth than companies not yet working with WaterTAP.

Running a “Cluster Organization” ...

What keeps me “up at night”?



- ① Ensuring that we continue to deliver real value in tangible ways.
- ② How to measure the value we deliver.
- ③ Fair, equitable and defensible resource allocation process (public resources).
- ④ Transition from 100% provincial funding to financial self-sustainability.

Contact Information

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#OntarioWater