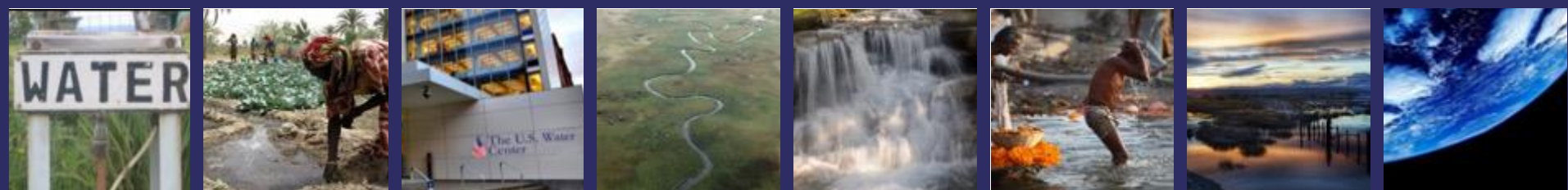
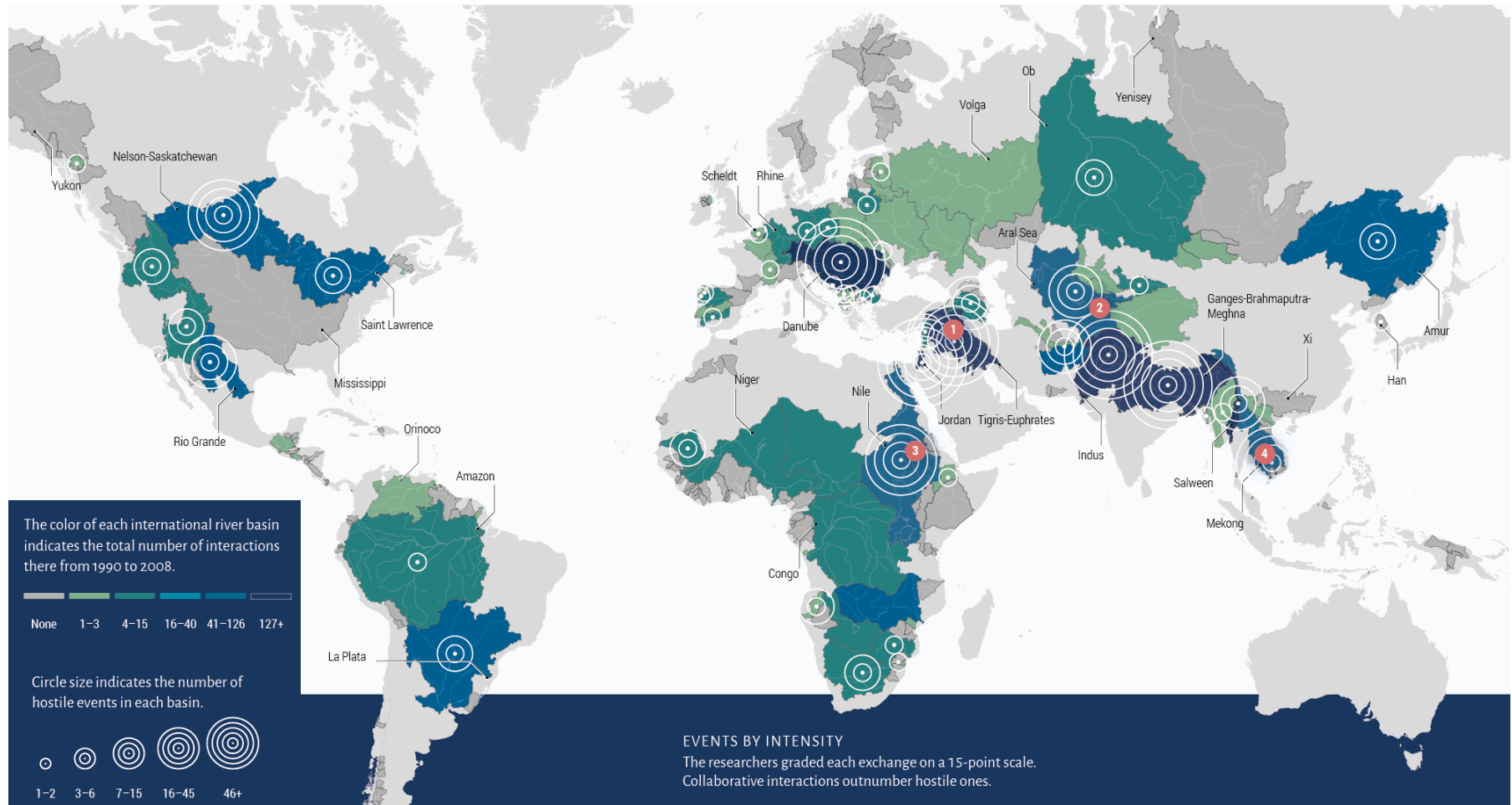


Background Briefing AccelerateH2O Investors Forum June 2016



Water Conflict Risk



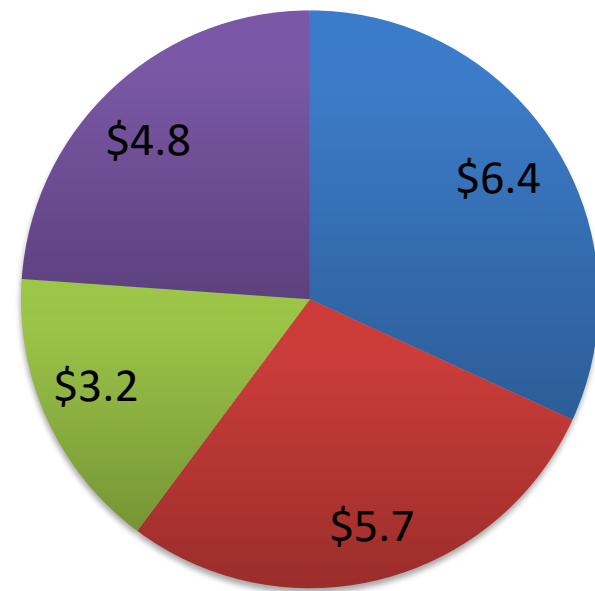
Water was ranked as the #1 Global Risk at the World Economic Forum in 2015 by over 750 leaders from around the world

Sizing the Market for Water

“The total **Base of the Pyramid (BOP)** in emerging water markets in Africa, Asia, Eastern Europe, and Latin America and the Caribbean, including all surveyed countries, is estimated to be **\$20 billion**, accounting for the spending of **3.96 billion people.**”

Source of quote and chart data: The International Finance Corporation (IFC) and the World Resources Institute, "The Next 4 Billion," 2007.

**BOP Spending on Water
(in Billions)**



- Asia (7)
- Africa (11)
- Eastern Europe (5)
- Latin America & the Caribbean (7)

Water Investment

- Water is essential, generally underpriced and less exposed to economic downturns than other assets.
- Water is the key input to agriculture, energy, industry, mining and urbanization.
- Spending on water infrastructure is expected to be over \$1.8 trillion over the next two decades, double that of electricity, road and rail combined.
- Estimated more than a quarter of global corporate profitability would be at risk if water was priced to reflect its true delivered value.

Source: *Trucost Research*.

Combined Price of Water and Wastewater in Major U.S. Cities



Infographic Source: Circle of Blue, "Price of Water 2015"

The USWP National Executive Committee

Unprecedented
engagement of
a High-Level
network to
address water
challenges.

Honorary Co-Chair



*The Honorable Madeleine
K. Albright*

Honorary Co-Chair



*The Honorable General
Colin Powell*

Vice Chair



Amb. Paula J. Dobriansky



*Amb. Rich
Armitage*



*Amb. Harriet
Babbitt*



*Amb. Lincoln
Bloomfield*



*Amb. Elizabeth
Frawley-Bagley*



Sherri Goodman



Hank Habicht



*Henrietta
Holsman Fore*



Gen. Jim Jones



Maria Otero



*G. Ruffner Page,
Jr.*



William K. Reilly



*Gen. Gordon
Sullivan*

Our Response

Mission: To unite and mobilize best of U.S. expertise, resources and ingenuity to address global water challenges, with a special focus on developing countries where needs are greatest.



“We must develop a comprehensive national water security strategy. It must be a forward-looking, detailed, data-driven blueprint laying out the economic, political, commercial and innovation lines of effort required to achieve long-term resource sufficiency at home and globally.”

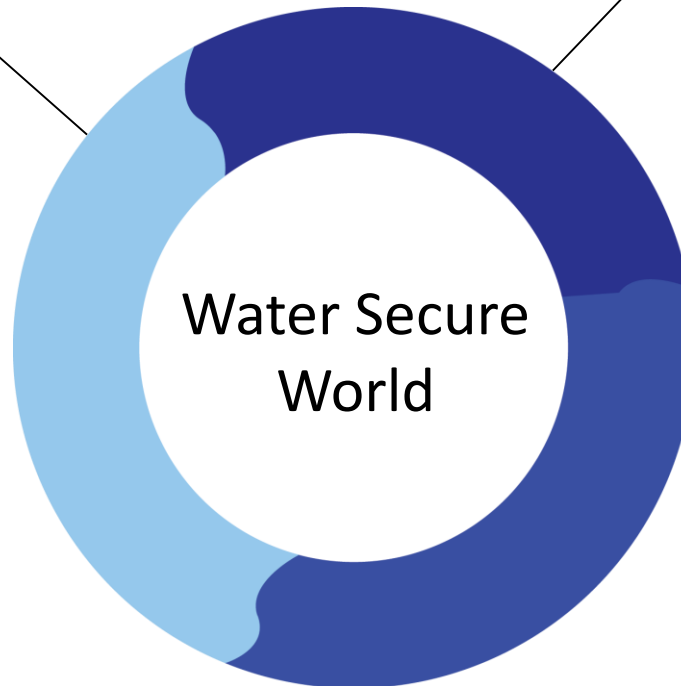
General Jim Jones, 32nd Commandant, U.S. Marine Corps, retired

Our Priorities

The USWP works with its partners to leverage a catalytic platform for collective action approaches focused on three key areas:

Elevating Water as a National Priority

The USWP and its partners are developing a “roadmap” for developing a U.S. Global Water Grand Strategy to provide a vision for America’s global water activities. Potential issues the strategy would include are infrastructure financing, climate change resilience and water technologies.



Improving Access to Expertise

With support from the U.S. Department of State, the USWP developed H2info, a web portal that is providing international stakeholders with easy access to the best of U.S. water data and information.

“Lead and Learn” Exchanges

The USWP builds capacity with various governments to provide solutions that address their key water challenges through programs such as the Water Consultants Program.

We deliver on issues such as food-energy-water nexus, resilience, technology innovation and utility strengthening through these service offerings.

The USWP works with 112 members to build a water secure world

Government



Private Sector & Foundations



Civil Society



Disruptive Resilience Conference

Chief Technology Officers mapped America's 2030 Water Future. Outcomes included:

- Synthesis Report identifying priorities and recommendations to promote water technology commercialization.
- Registry of water technology experts to inform decision makers.
- Statement of Principles from key U.S. Technology Leaders on America's Water Security.
- Water challenges to engage private sector, start-ups, government, and civil society on water technology

Co-conveners:



TECHNOLOGY FOR AMERICA'S WATER FUTURE DISRUPTIVE RESILIENCE



Ambassador Paula J. Dobriansky, Vice Chair, USWP National Executive Committee (left) and
Ms. Felicia Marcus, Chair, California Water Resources Control Board (right)

Potential Next Steps and 2016 Timeline

- **The National Conversation on Integrated Water Information for the 21st Century (July 12 – 14, 2016)**
- **Global Water Security Summit and Assessment Report (March 21, 2016 and ongoing report)**
- **WaterTech for Resilient Cities Conference follow-up activities (e.g. prizes/challenges to be announced)**

2016 Timeline

June

- Water Council Water Summit
- US Water Alliance One Water Summit
- WCP Exchange to South Africa

August/September

- Stockholm World Water Week session on drought resilience
- Concordia Summit

July

- National Conversation on Integrated Water Information for the 21st Century

October

- Caribbean Water and Wastewater Association Climate Change – Food Water Energy Nexus

Benefits of Your Membership

- Aligning your priorities and investments with other private and public sector organizations to increase the impact of your work and minimize risk
- Developing thought leadership opportunities to showcase your expertise and capabilities
- Accessing U.S. and international government, NGO and private sector decision makers
- Offering select commercial opportunities