



IMAGINE |  | H<sub>2</sub>O

2019 | **Accelerator Overview**

THE LEADING PATH TO MARKET FOR WATER INNOVATION AND ENTREPRENEURSHIP

2018 IH2O Accelerator

- AQUAM
- change
- H2nano
- IntelliFlux Controls
- osmo systems
- Pipeguard Robotics

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to Str

- TRACTA
- IWR IslandWater
- water pigeon

IMAGINE



# Accelerator: Introduction



Imagine H2O's mission is to empower people to develop and deploy innovation to solve water challenges globally. The Imagine H2O Accelerator is the world's leading water-focused company development program. In 2018 alone, current and alumni IH2O companies have raised over \$140m to build sustainable solutions to pressing problems, from last-mile water access to next generation data analytics.

## A PROVEN PATH TO MARKET

 **82%**  
SURVIVAL RATE

 **90**  
PORTFOLIO COMPANIES

 **35+**  
APPLICANT COUNTRIES

 **1 in 10**  
DOLLARS OF EARLY-STAGE  
INVESTMENT IN WATER SECTOR  
SINCE 2009

 **35%**  
OF ALL EARLY STAGE  
INVESTMENT IN 2017

 **65**  
BETA PARTNERS IDENTIFYING  
PILOTS GLOBALLY

## Providing the resources to develop and scale water technology businesses



MENTORSHIP & INSIGHTS



CUSTOMER & INVESTOR ACCESS



INDUSTRY VISIBILITY



Emily Hicks | PRESIDENT, FREDSENSE



"Imagine H2O's Accelerator fundamentally changed the way we thought about growing our business. An absolute must for any entrepreneur in the industry."

# Creating An Unfair Advantage for Water Entrepreneurs



2018 marked Imagine H2O's ninth year empowering entrepreneurs and changemakers to unlock promising solutions for a water-scarce future. Below is an overview of our process, supporting entrepreneurs in person and remotely throughout the 10 month cycle.

## THE IMAGINE H2O IMPACT ENGINE

### 1 THE ACCELERATOR



- 12 startups selected from a global field
- 2,500+ comments provided to 2018 applicants
- 125+ judges (2 stages)
- 60 mentors
- 65 Beta Partners
- 200+ investors

### 2 DIRECT STARTUP SUPPORT & MENTORSHIP



JANUARY



CAPACITY DEVELOPMENT



CUSTOMER INTRODUCTIONS



INVESTOR INTRODUCTIONS



MARKETING & VISIBILITY

OCTOBER

### 3 IMPACT ON SUSTAINABLE RESOURCE MANAGEMENT



#### 2018 Highlights

- 2 million people monitored for vulnerability to flooding
- 150,000 miles of buried pipes surveyed for leaks
- 13,000 people with reliable access to clean water
- 500,000 liters of surface water protected from toxins
- \$44 million raised year to date



Ben Reeve | CTO, CUSTOMEM

"An incredibly valuable and intense process. We found more critical channel partners in SF Week than we had in the whole previous year. Brilliantly organised and absolutely invaluable for our growth and success."



# Accelerator: 2018 Progress Summary



The 2018 Accelerator companies have achieved record results, from fundraising to customer deployment. We expect the 2019 Accelerator companies to improve on the considerable rate of progress they have achieved.

## CURRENT ACCELERATOR METRICS YTD

Fundraising

**\$43M**

INVESTMENT RAISED

Investor Introductions

**41**

PER COMPANY

Customer Contacts

**67**

PER COMPANY

Webinars

**72**

COMPANY HOURS

Rate of Improvement

**42%**

FASTER PROGRESS WITH IH2O

Installations

**39**

TECH DEPLOYMENTS COMPLETE

Jobs

**19**

FULL TIME HIRES

Deployment

**37**

LIKELY DEPLOYMENTS FROM IH2O  
CONNECTIONS IN NEXT 6 MONTHS

### ALUMNI UPDATE

Investment

\$75M



\$25M

Exit



### BETA PARTNERS UPDATE

New Beta Partners



Customer Contacts

**110**

INTRODUCTIONS

Investor Contacts

**14**

INTRODUCTIONS

# of Beta Partner deployments projected EOY 2018

**22**

INSTALLATIONS

# Accelerator: 2018 Outcome Case Studies



Imagine H2O's support creates a range of outcomes for companies, from customer and investor introductions to mentor and advisor relationships.



## PILOT



### Deploying with a sector-leading multinational

IntelliFlux Controls have embarked on a 6-month pilot with a confidential IH2O Beta Partner. The companies met during Imagine H2O SF Week.



## INVESTMENT



### Scaling artificial intelligence tools for utilities

IH2O Beta Partner Kurita purchased a majority stake in Fracta for \$37m, allowing the company to build their predictive maintenance prioritization tool for the long term.



## PILOT



### Affordable, quick smart meter retrofits

Water Pigeon is deploying a pilot with Imagine H2O Beta Partner Central Contra Costa Sanitation District, providing affordable meter reading for some of the district's toughest meters.



## INVESTMENT



### Improved wastewater management and energy recovery

Aquacycl closed a \$2m round of funding with two investors met during Imagine H2O SF Week.



## MENTORSHIP



### Reducing impacts on freshwater resources near fish farms

Osmo Systems continues to work with their first IH2O mentor, Mitchell Presser (Partner, Freshfields), on strategy, market development and domestic rollout.

# 2018 International Programming



Imagine H2O continues to expand the reach and impact of its accelerator program through new global initiatives and partnerships. Below is a sample of our 2018 engagements. 2019 Accelerator companies will benefit from Imagine H2O's enhanced global reach.



## URBAN DRINKING WATER CHALLENGE 2018

- \$1 million competition to deploy decentralized drinking water solutions globally launched (May '18).
- 160 startups registered from 30+ countries; 3 winners announced in Stockholm at World Water Week (Aug '18).



## IMAGINE H2O SMART WATER HUB @ AQUATECH CHINA

- 18 international startups showcased at IH2O-led pavilion at Aquatech China, Asia's largest water trade show.
- Mentorship and support included 6 market readiness webinars to prepare startups for China market.



## WORLD BANK GLOBAL LEARNING SESSIONS

- Led 2 innovation sessions to present IH2O vetted solutions to 250+ World Bank staff, clients and partners (Singapore & Addis Ababa).
- 1 confirmed World Bank deployment under discussion with IH2O portfolio company.



## IMAGINE H2O ASIA

- Partnership announced with Enterprise Singapore to support development of IH2O Accelerator activities in Southeast Asia.
- Initial program planned for 2018 at Singapore Week of Innovation and Technology.

# Accelerator: Process & Timeline



JANUARY



## CAPACITY DEVELOPMENT

Strategy & Planning  
4x Mentor Engagements



## CUSTOMER INTRODUCTIONS

60 Beta Partners  
Online & Offline Presentations



## INVESTOR INTRODUCTIONS

200+ Investor Network  
Online & Offline Presentations



OCTOBER

## MARKETING & VISIBILITY

IH2O Marketing  
Platform Network Events

### ADDITIONAL ACCELERATOR BENEFITS

- Cash awards and in-kind support from strategic partners
- Zero equity
- Remote-based program
- Showcased at IH2O's Water Gala, Innovation Forum, WEFTEC Innovation Pavilion and more
- Network of 60+ mentors, 90 program alumni
- Direct Investor & Customer Showcases (March, June, October)

### 2019 ACCELERATOR TIMELINE



Accelerator Kick-Off  
First Mentors Assigned



IH2O SF Week  
Water Gala '18



Customer & Investor  
Presentations



WEFTEC



Customer & Investor  
Presentations  
Watersmart Innovations

### IH2O WATER GALA '18



Imagine H2O's annual showcase event in March celebrates the Accelerator companies and introduces them to 350+ members of IH2O's network. Sponsored by Salesforce, Water Gala '18 attracted industry leaders from across the country.



### IH2O/WATER ENVIRONMENT FEDERATION INNOVATION FORUM

On Thursday of SF Week, Imagine H2O holds the annual Innovation Forum alongside WEF. In 2018, 130 senior water executives gathered to discuss Deployment for Impact in the water sector. Accelerator companies pitch to the crowd, lead roundtable discussions with issue experts, and network with potential partners, customers and investors. In 2018, Accelerator companies reported 168 actionable connections from the day.

# Accelerator: IH2O SF Week March 2019



All companies participate in a week-long water innovation bootcamp culminating in the annual Imagine H2O Water Gala. IH2O SF Week is the only time participants are required to be in San Francisco. Participants benefit from interactive workshops, one-one-consultations with customers, investors and IH2O alumni, as well as working with each other.

## 2019 IH2O SF WEEK SCHEDULE

**SUNDAY 17**

**MONDAY 18**

**TUESDAY 19**

**WEDNESDAY 20**

**THURSDAY 21**

Welcome Dinner | Program Introductions

IH2O Programming (Strategy, Alumni 1-on-1s)

IH2O Programming (Strategy, Customer & Investor 1-on-1s)

Finalist Pitch & Judging | Final Sessions | External Meetings

IH2O/WEF Innovation Forum & Water Gala '19

## 1-ON-1 MEETING PARTICIPANTS

### FOUNDERS

**Nancy Hartsoch**  
CEO, AquaSeca

**Ashwin Madgavkar**  
CEO, Ceres Imaging

**Mark Peterman**  
CEO, OndaVia

**Peter Yolles**  
Founder, Watersmart Software

**Adam Tank**  
CEO, Industrial Optic

**Keri Waters**  
CEO, Buoy

**Anil Jha**  
Founder, Aquanovation

**Jimit Shah**  
CEO, Flow Labs

**Shahram Javey**  
Director, Badger Meter

**Robb Barnitt**  
CEO, DropCountr

### INVESTORS

**Andy Wales**  
Global Innovation Fund

**Marc van den Berg**  
DBL Partners

**Shrina Kurani**  
Better Ventures

**Kyle Kurpinski**  
Tencent

**Dan Martin**  
Syzygy West

**Noah Swartz**  
Gratitude Railroad

**Andy Wheeler**  
GV

**Geordan Hankinson**  
Renewal Funds

**Eric Desai & Pete Henig**  
Greenhouse Capital

**Henri Lambert**  
Apsara Capital

**Danielle Keiser**  
Wincubator

### CUSTOMERS

**Ralph Exton**  
Suez

**Richard Harris**  
EBMUD

**Blair Palmer**  
UNICEF

**Jean-Marc Petit**  
Central Sanitation

**Lewis Harrison**  
SFPUUC

**Elan Emanuel**  
water.org

**Sameer Mithal**  
WaterHealth International

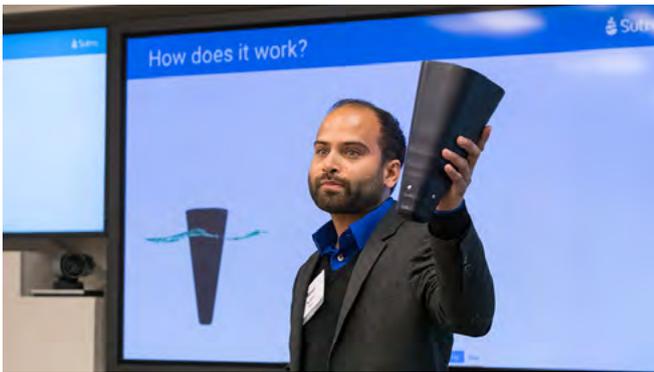
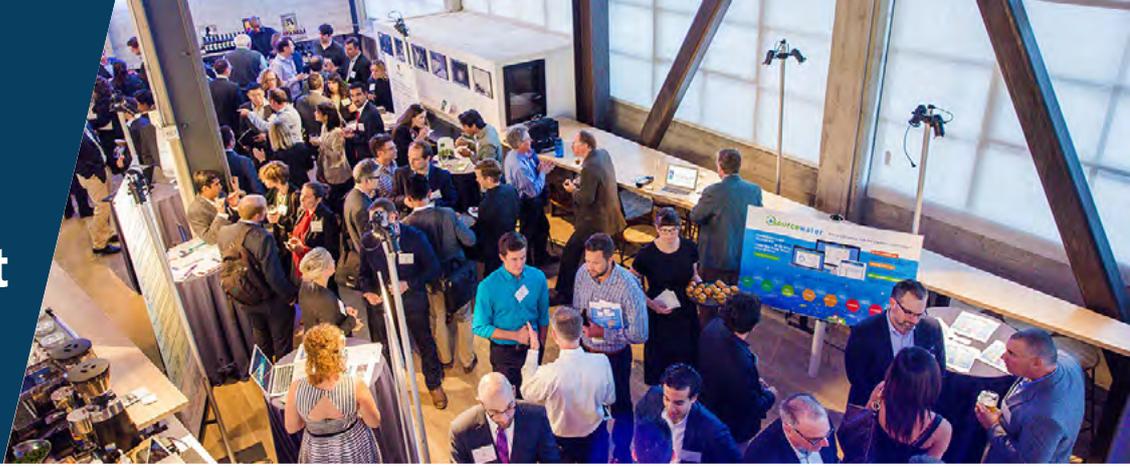
**Justin Kauffman**  
Aqua America

**Mia Javier**  
Veolia

**Jason Monnell**  
Tetra Tech

**Eric Willman**  
Pepsico

# Accelerator: Remote Support

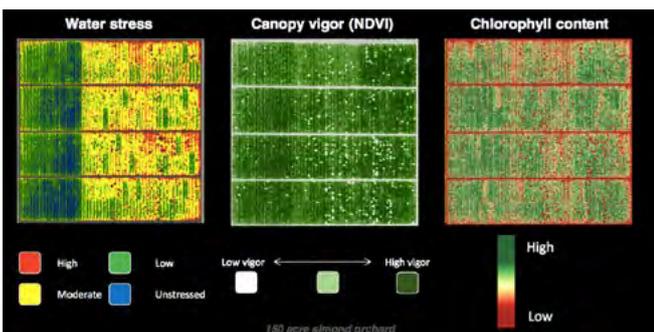


## MENTORSHIP

IH2O matches each participant throughout the year with 4 dedicated mentors drawn from the organization's mentor network of 60+ industry experts and thought leaders. IH2O works closely with each participant to identify the appropriate mentor as company needs and priorities evolve throughout the program.

## INNOVATION PAVILIONS

Since 2011, IH2O has hosted annual innovation pavilions at the largest drinking water and wastewater trade conferences both in the US and abroad. IH2O showcases its portfolio companies as well as spearheads workshops and pitch sessions to raise awareness about the water innovation opportunity. Thousands of delegates visit the innovation pavilions every year.



## ONLINE LEARNING AND ENGAGEMENT

IH2O designs and hosts invite-only webinars throughout the year for its portfolio companies and network of customers and strategic partners. This includes live pitches and capacity development sessions. Examples of recent webinars include: Selling to Utilities; Managing Channel Partners; Building a Data Company in Water; Understanding Term Sheets; Raising Money in Water.

## DEPLOYMENT FOR IMPACT

IH2O serves as a customer validation platform, providing 2018 accelerator companies with 39 deployments year to date. In 2018, IH2O will offer deployment awards to pilot technologies in underserved markets in the U.S.. This program will expand in 2019, including a range of potential activities linking Accelerator companies to new markets globally.



# Applying to Imagine H2O



Any company offering a solution that meets our qualifications is welcome to apply. In particular, Imagine H2O seeks innovative, commercially viable solutions from anywhere in the world that represent a step-change in progress against the following issues:



## SCARCITY & SAFETY

Increased reliability, safety, and security of access to water



## WATER EFFICIENCY

Reduction of the water intensity of industry and agriculture



## MONITORING & TREATMENT

Improved treatment and testing of water and wastewater streams



## UTILITY OPERATIONS

Cost-effective upgrades in infrastructure, maintenance, supply chain, and operational performance



## DATA & ANALYTICS

Increased reliability, safety, and security Improved management, analysis and communication of water data of access to water

## KEY DATES



## KEY QUALIFICATIONS FOR APPLICANT COMPANIES

01

Founded after Jan 1, 2014

02

Less than \$10m in outside capital raised

03

Less than \$5m in annual revenue

IH2O's process evaluates each applicant's potential or demonstrated ability to identify a beachhead market, successfully sell into such markets, and achieve scale. The process favors companies that merge a strong technology (either emerging or proven) with an innovative business model. For the full terms and conditions please refer to the 2019 Accelerator Application Form (link on final page).

# Judges, Events & Beta Partners



## IMAGINE H2O JUDGING PANEL

**Steve Kloos** | True North Venture Partners  
**Chris Morrison** | Independent  
**Debra Coy** | XPV Water Partners  
**Andy Wheeler** | Google Ventures  
**Paul Gagliardo** | Independent  
**Adam Tank** | GE Water & Process Technologies  
**Nick Dyner** | Heartland Technology Partners  
**Tao Bindslev** | Rebel Impact Lab  
**Snehal Desai** | Evoqua  
**Rob Leclerc** | AgFunder  
**Mitchell Presser** | Freshfields  
**Dirk Brusis** | Skion  
**Mike Sesko** | Independent  
**Sameer Mithal** | Waterhealth International

**Leslie Shoemaker** | Tetra Tech  
**Peter Williams** | IBM  
**Karen Golmer** | MIT  
**Graeme Jarvis** | Johnson Controls  
**Biju George** | DC Water  
**Sead Bajrovic** | Grundfos  
**Catherine Ricou** | Suez  
**Helge Daebel** | Emerald Technology Ventures  
**Danielle Keiser** | Wincubator  
**Andy Wales** | Global Innovation Fund  
**Reinhard Hübner** | Skion  
**Hendrik Laursen** | AMI Global  
**Nicole Neeman Brady** | Renewable Resources Group  
**Pierre Côté** | COTE Membrane Separation

## MEET US - REMAINING 2018 EVENTS

Imagine H2O will be present at the following 2018 events:



SAN FRANCISCO / SEP 12-14



SINGAPORE / SEP 17-19



NEW ORLEANS / SEP 29 - OCT 3



LAS VEGAS / OCT 3-5



**Orianna Bretschger** | CEO, AQUACYCL

"SF Week resulted in more useful introductions to customers, investors and potential partners than we had been able to achieve in over one year of operations."



INDUSTRY



WATER UTILITIES & AGENCIES



ALLIANCE PARTNERS



# Imagine H2O Supporters



## HEADLINE SPONSOR



## FOUNDING URBAN DRINKING WATER CHALLENGE SPONSORS



## CORE SPONSORS



## IH2O ASIA TRACK PARTNER



## PHILANTHROPIC PARTNERS



## LAW FIRM SPONSOR OF THE 2018 ACCELERATOR



## INDUSTRY PARTNERS



## ACCELERATOR PARTNERS



## CHINA STRATEGIC PARTNER





# Building an unfair advantage for water entrepreneurs

JOIN THE LEADING  
ACCELERATOR FOR  
WATER INNOVATION

APPLY NOW

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