

Minnesota Water Technology Cluster Interview Due Diligence

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The following work was paid for by Greater MSP.

Interview Information

- 22 interviews conducted during Summer/Fall 2014
- 20 companies/groups interviewed
- 32 individuals interviewed
- Companies included:
 - 3M
 - Aeration Industries
 - Aspen Research
 - Cartwright Consulting
 - Creative Water Solutions
 - Dow
 - Ecolab
 - EcoWater
 - General Electric
 - Mainsail Global
 - Met Council
 - Pentair
 - Prime Membrane Partners
 - RWL Water USA
 - TechKnowledgey
 - Tonka Water
 - Toro
 - University of Minnesota
 - Watasso Ventures
 - Wenck Associates

Two Key Points about the water technology industry

- \$150B industry with \$100B coming from user fees
- Fortune 500 headquartered companies not largest water employers in the state

Five Key Findings

- Urgency of Action
- Minnesota's Unique Opportunity in the Global Water Technology Marketplace
- A Willingness to Get Organized
- The Need for Coordination
- The Need for Focus

Finding: Urgency of Action

- Minnesota's strong economic position in water technology is threatened by effective and aggressive efforts by other regions
- Need a local water technology brand
- Partnership with WI and OH to lead national dialogue advocating national economic growth via water technology industry

Finding: Minnesota's Unique Opportunity in the Global Water Technology Marketplace

- Importance of water huge opportunity
- Minnesota has a legacy water industry but not a brand
 - “We aren’t making it up”
 - “We aren’t trying to grow something that isn’t here”
 - “We aren’t trying to create the future”
- Basic organizing efforts within water industry could yield huge economic opportunity

Finding: A Willingness to Get Organized

- “If Minnesota is in 10th place with exports and we aren’t organized, what would happen when we get organized?”
- Major, deep, long-standing presence in water technology, but because Minnesota is not organized and lacks a brand, we are not recognized as an industry leader

Finding: The Need for Coordination

- Within Minnesota's industry
- Of to the Minnesota industry to the U
- Of the Minnesota industry to the world
- Need a 'Minnesota water CEO'
- Strong advocates for the creation of a new organization but each lacked one or more of the following: a leadership position, time or resources

Finding: The Need for Focus

- Within water industry –or- economic growth
- Water technology is an industry of industries
- No organization identified that focuses on economic growth and prosperity
- Leverage existing industry initiatives to begin conversation

Additional Thoughts

- EPA Letter of Collaboration to support Minnesota's cluster