

Global Water Deregulation Report

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What's in this report?

- In depth description of the types of water and wastewater privatisation
- World survey of Water & Wastewater deregulation
- Coverage of deregulation in the water sector at the country and regional-level

NRG Expert Market Intelligence Report Highlights:

Water deregulation – the growth and the backlash

The world's population is averaging a growth rate of around 1.1% annually. This is creating a greater demand for improved water supplies and sanitation, especially in developing countries and urban areas. As stronger population growth is generally observed in these regions. They may also have more challenging requirements to meet the water target under the UN's Millennium Development Goals (MDGs). A target of reducing 'the proportion of people without sustainable access to safe drinking water and sanitation' for eligible countries by half by 2015.

Private sector

To meet the growing demand for safe water and sanitation private sector involvement will be needed in the water sector has increased. This is in the context of the developing countries. There is also a demand for repair to existing infrastructure and plants, and new facilities in the developed world. Due to the investment involved and expertise needed. The share of private companies in the water and wastewater market is forecast to increase from 8% of the global population in 2003 to 17% in 2015. A problem for the water industry is that water is perceived as a right and citizens are less willing to pay for water than they are for electricity.

Private sector opposition

Opposition to privatisation of the water sector is strong in some countries and the subject is contentious. The renationalisation of some assets has occurred with major water companies paying fines failing to comply with their contract, usually in terms of investment in infrastructure. In some countries there are moves to make water privatisation illegal. For example, there is a water privatisation ban in the Netherlands and Uruguay, and a draft law to make water privatisation illegal is under development in Italy. There has been an increase in Public-to-Public Partnerships (PUP) contracts for water projects, and the World Bank is softening its approach towards privatisation. The recent Arab spring also included protests against water privatisation. For example, in Rabat and Tetouan in Morocco there were demonstrations to terminate Veolia's contracts and Veolia's offices in Tanger were set on fire.

Water companies

In many countries, major water companies such as Veolia and Suez are involved in joint ventures to develop projects. Recently, Veolia publically announced that it plans to expand worldwide mostly through build-own-transfer (BOT) and management contracts, with fewer 'ownership' projects.

Key countries for the water sector in terms of future investments are China and India. A total of RMB 15 billion (\$2.2 billion) was spent on sewage treatment facilities in the first half of 2010 in China alone.

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Table of Contents

1. Executive Summary	9
Overview	9
2. Types of Water & Waste Privatisation	27
Why liberalise the water sector?	27
The perception of water	28
PSP - private sector participation models	29
PUPs - Public-public partnerships and ‘twinning’ in water and sanitation	32
3. World survey of Water & Waste Deregulation	41
World survey of water & waste deregulation	41
4. Europe	52
EU water and waste directives and investment	52
Western Europe	55
Austria	55
Belgium	58
Cyprus	60
France	61
Germany	75
Greece	84
Ireland	87
Italy	91
Luxembourg	97
Malta	97
Netherlands	98
Portugal	101
Spain	103
Switzerland	107
United Kingdom	108
4. Nordic Countries	129
Overview	129
Denmark	130
Finland	133
Iceland	136
Norway	137
Sweden	138
5. Central Europe	143
Overview	143
Czech Republic	144
Hungary	148
Poland	152
Slovakia	158
Slovenia	160
6. The Baltic Countries	161
Overview	161
Estonia	162
Latvia	164
Lithuania	165
7. Southeast Europe (Balkans)	167
Overview	167

Albania.....	168
Bosnia Herzegovina	171
Bulgaria.....	172
Croatia	175
Macedonia	176
Romania	177
Serbia Montenegro	179
Turkey	180
8. CIS	182
Overview	182
Armenia	185
Azerbaijan.....	186
Belarus.....	187
Georgia	188
Kazakhstan	191
Kyrgyzstan.....	193
Moldova	193
Russia.....	194
Tajikistan.....	204
Turkmenistan.....	205
Ukraine	206
Uzbekistan.....	210
9. Southeast Asia	211
Japan	211
Korea, South.....	217
Macao	220
Taiwan	221
China	223
Hong Kong.....	242
Cambodia	243
Indonesia	246
Malaysia.....	253
Myanmar.....	259
Philippines	260
Singapore	266
Thailand.....	268
Vietnam	271
10. Indian Sub-Continent	276
Bangladesh.....	276
India	281
Nepal	289
Pakistan	293
Sri Lanka.....	298
11. Asia Pacific	302
Australia.....	302
New Zealand.....	308
12. North America	309
United States of America.....	309
Canada	324
13. South America	327
Overview	327

Argentina	329
Bolivia	332
Brazil.....	335
Chile.....	341
Colombia.....	352
Ecuador	357
Paraguay	359
Peru	363
Uruguay	367
Venezuela.....	369
14. Central America and the Caribbean	372
Mexico	372
The Northern Triangle	380
Belize	380
Costa Rica	380
El Salvador	381
Guatemala	383
Honduras	384
Nicaragua	385
Panama	387
Puerto Rico.....	388
Caribbean	389
Bahamas.....	389
Barbados	389
Bermuda	389
Cuba	389
Dominican Republic.....	390
Haiti.....	392
Jamaica	393
St Lucia.....	394
Trinidad & Tobago	395
15. Middle East	396
Bahrain	396
Iran.....	397
Iraq.....	398
Israel	399
Jordan.....	401
Kuwait.....	402
Lebanon.....	403
Palestine	407
Qatar.....	408
Saudi Arabia	409
Syria.....	412
United Arab Emirates	413
Yemen	416
16. MENA - Middle East and North Africa - Mahgreb	417
Algeria.....	417
Egypt	419
Libya	421
Mauritania	421
Morocco	422

Tunisia	424
17. Sub-Saharan Africa	426
Overview	426
18. East Africa - Great Lake Region	435
Burundi	435
Djibouti	435
Ethiopia	435
Kenya	436
Mauritius	438
Rwanda	438
Somalia	439
Sudan	440
Tanzania	441
Uganda	441
19. Central Africa	443
Cameroon	443
Central African Republic	443
Chad	445
Congo, Republic (Brazzaville)	445
Congo, Democratic Republic (Kinshasa)	445
Gabon	446
Guinea Equatorial	446
20. West Africa	447
Benin	447
Burkina Faso	447
Cape Verde	447
Côte d'Ivoire	448
Gambia	448
Ghana	449
Guinea	451
Guinea-Bissau	452
Liberia	452
Mali	452
Niger	453
Nigeria	454
Senegal	459
Sierra Leone	459
Togo	460
21. South African Development Community	461
Overview	461
Angola	462
Botswana	462
Lesotho	463
Madagascar	464
Malawi	464
Mozambique	465
Namibia	470
South Africa	471
Tanzania	478
Zambia	478
Zimbabwe	479
22. Glossary	480

Table of Tables

Table 2-1: Public-public partnerships (PUPs) in water and sewerage	34
Table 3-1: World Survey of Water and Waste Deregulation	41
Table 4-1: Veolia subsidiaries in water in Europe	67
Table 4-2: Suez subsidiaries in water in Europe	69
Table 4-3: Saur subsidiaries in water in Europe.....	70
Table 4-4: Gelsenwasser subsidiaries in Europe	81
Table 4-5: Major Italian Aziendi water utilities	95
Table 4-6: Water supply companies in the Netherlands, 2009	99
Table 4-7: UK Water Company ownership.....	111
Table 4-8: Changes in water ownership in the UK and Ireland, 1970 - 2007	113
Table 5-1: Water concessions companies in the Czech Republic	146
Table 5-2: Concession companies in Hungary.....	149
Table 9-1: Water supply bodies.....	213
Table 9-2: Water Supply Plants and Pipelines 2000 - 2005.....	218
Table 9-3: Construction of Sewage Treatment Plants 2000 - 2005	218
Table 12-1: A Summary of the Law.....	311
Table 15-1: IWPs and IWPPs plants in Oman	405
Table 15-2: IWPPs in Saudi Arabia.....	411
Table 15-3: Water production in Abu Dhabi in the UAE, 2011	414
Table 17-1: Access to drinking water in 10 African cities	429
Table 17-2: Market share, earnings and employment in concessionaire and independent water and sanitation providers in Dakar and Bamako.....	432
Table 17-3: How the sanitation market works in African cities	433

Table of Figures

Figure 1-1: Private sector investments in water and sanitation projects in developing countries, \$ million, 1991 to 2010.....	10
Figure 1-2: Number of private sector investments in water and sanitation projects in developing countries, 1991 to 2010.....	10
Figure 1-3: PSP Options - A continuum	13
Figure 2-1: PSP Options - A continuum	29
Figure 4-1: Revision of EU Water Policy	53
Figure 4-2: Investment and employment related to EU environmental policy, 1990 – 2010	54
Figure 4-3: Dutch water companies	99
Figure 4-4: UK Water and Sewage companies	109
Figure 4-5: UK Water-only supply companies.....	110
Figure 12-1: States where American Water Works operates and their market conditions	322
Figure 17-1: Public water service in African cities	428



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