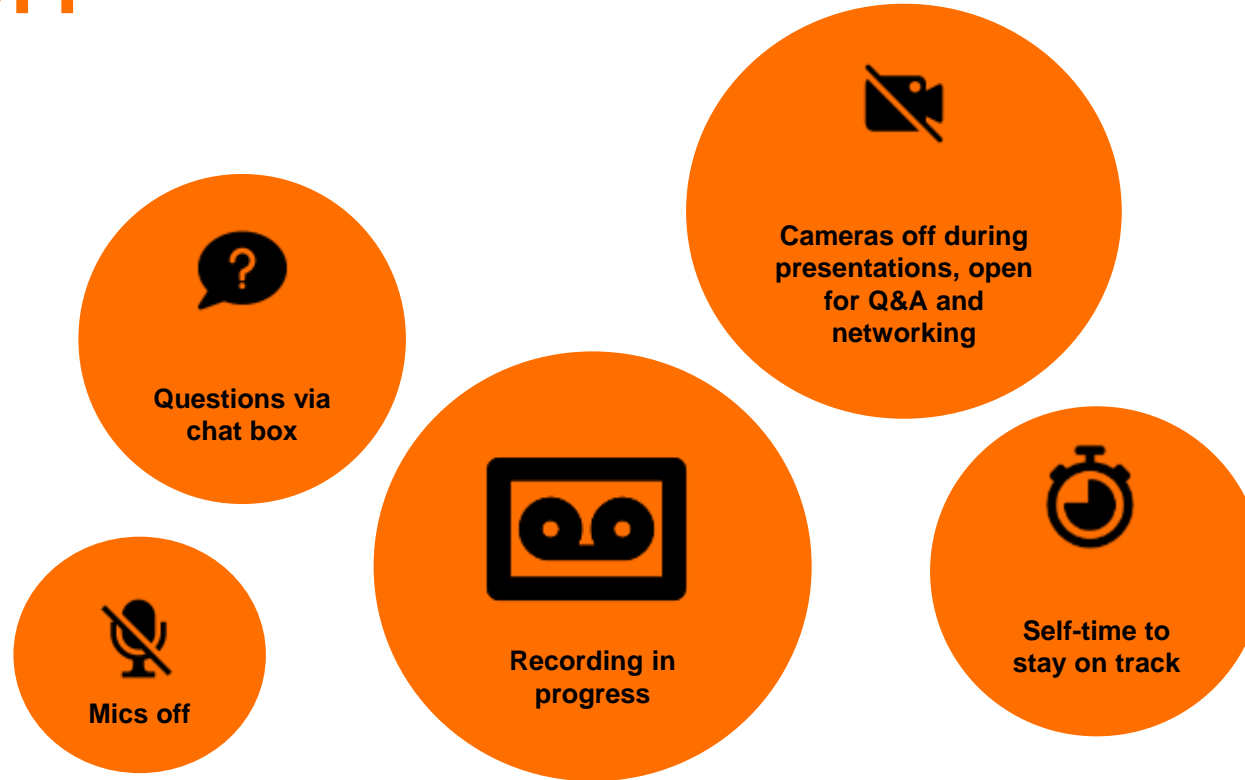


Help us make it a smooth session





Netherlands

Matchmaking mission Netherlands - Poland

21-23 June 2021



Agenda Monday 21 June

10:00 Opening

10:15 Presentation Water Management
market scan research report Poland

10:50 Break

11.00 Water Financing opportunities

13:30 Matchmaking

18:00 End

Netherlands

Sanne Kaasjager –

Trade Counselor and
Head of the Economic
Department of the
Embassy of the
Kingdom of the
Netherlands



Netherlands

Bianca Nijhof —

Managing Director
Netherlands Water
Partnership (NWP)



Netherlands Water Partnership (NWP)

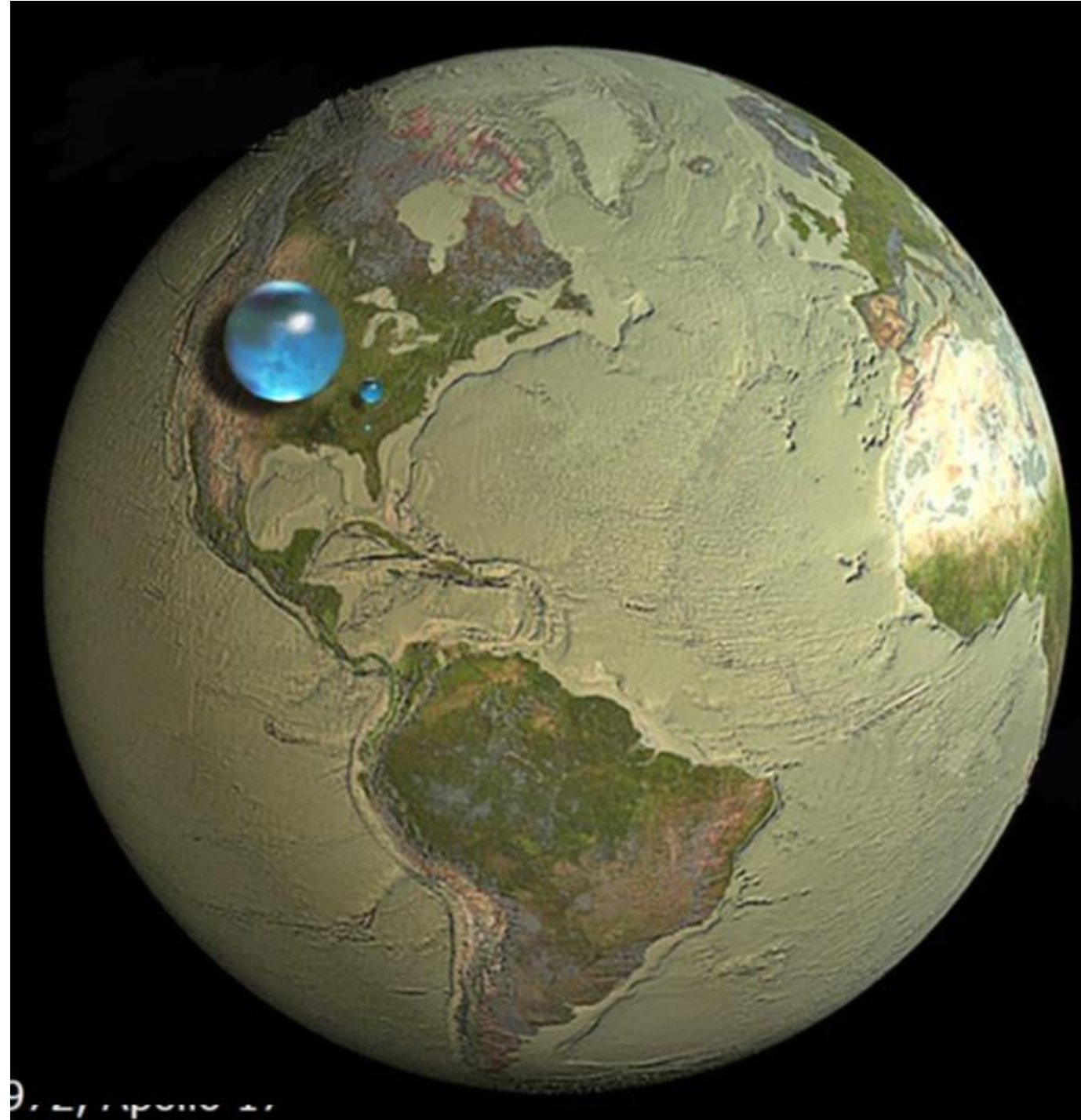
The largest international water network in the Netherlands

NWP unites Dutch water expertise and is the first point of call.

- Matchmaking
- Collaboration
- Events & Promotion
- World Wide Network



Water is one of the most pressing issues of our time.



Poland - Netherlands

- Long tradition on collaboration
- Strategic Partners

BaltExpo	2017
Trade mission Gdansk	2018
Urban Day	2018
Drought webinar	2020





Cooperation is key.
Let's work together!

Netherlands

Janine
Kaya-

Project Officer
International Innovation
|Enterprise Europe
Network

NL



Helping ambitious SMEs innovate and grow internationally

Janine Kaya | Netherlands Enterprise Agency





The world's largest support Network for SMEs with international ambitions



3000

LOCAL
EXPERTS



600+

LOCATIONS



60+

COUNTRIES
WORLDWIDE

17 key sectors

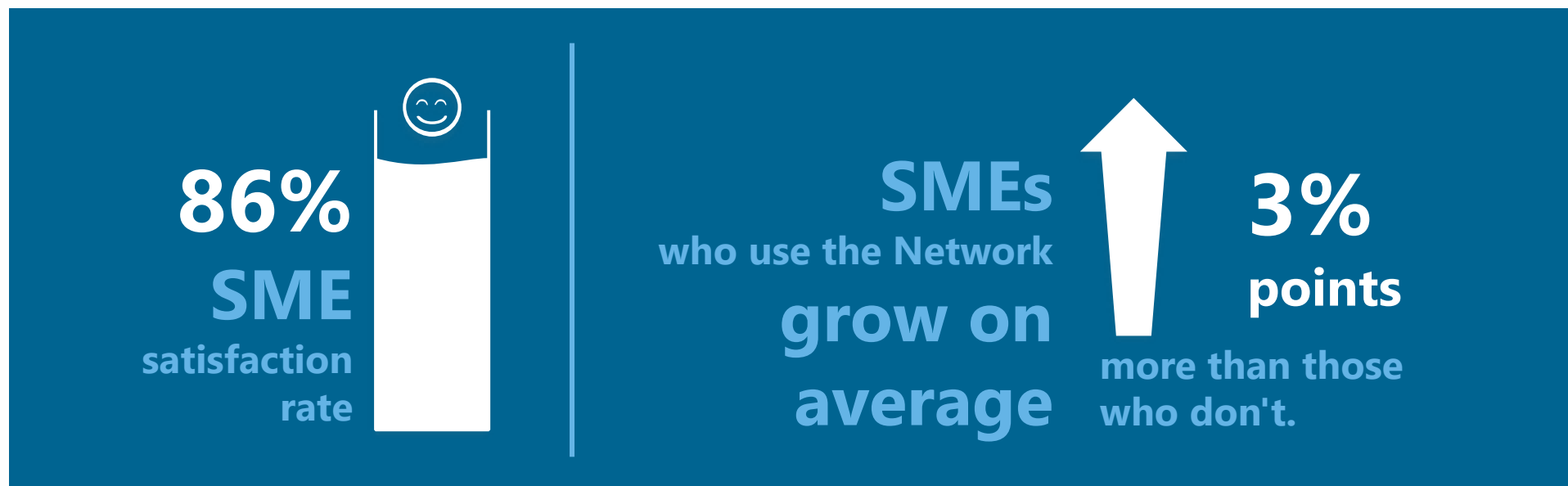
Network experts in 17 key sectors have teamed up to provide you with customised support.



A broad range of services for growth-oriented SMEs



It works! Satisfied, successful SMEs





How can we help you?

Contact us

Janine Kaya
Netherlands Enterprise Agency

E: Janine.kaya@rvo.nl

W: www.rvo.nl

W: een.ec.europa.eu
to find the Network near you



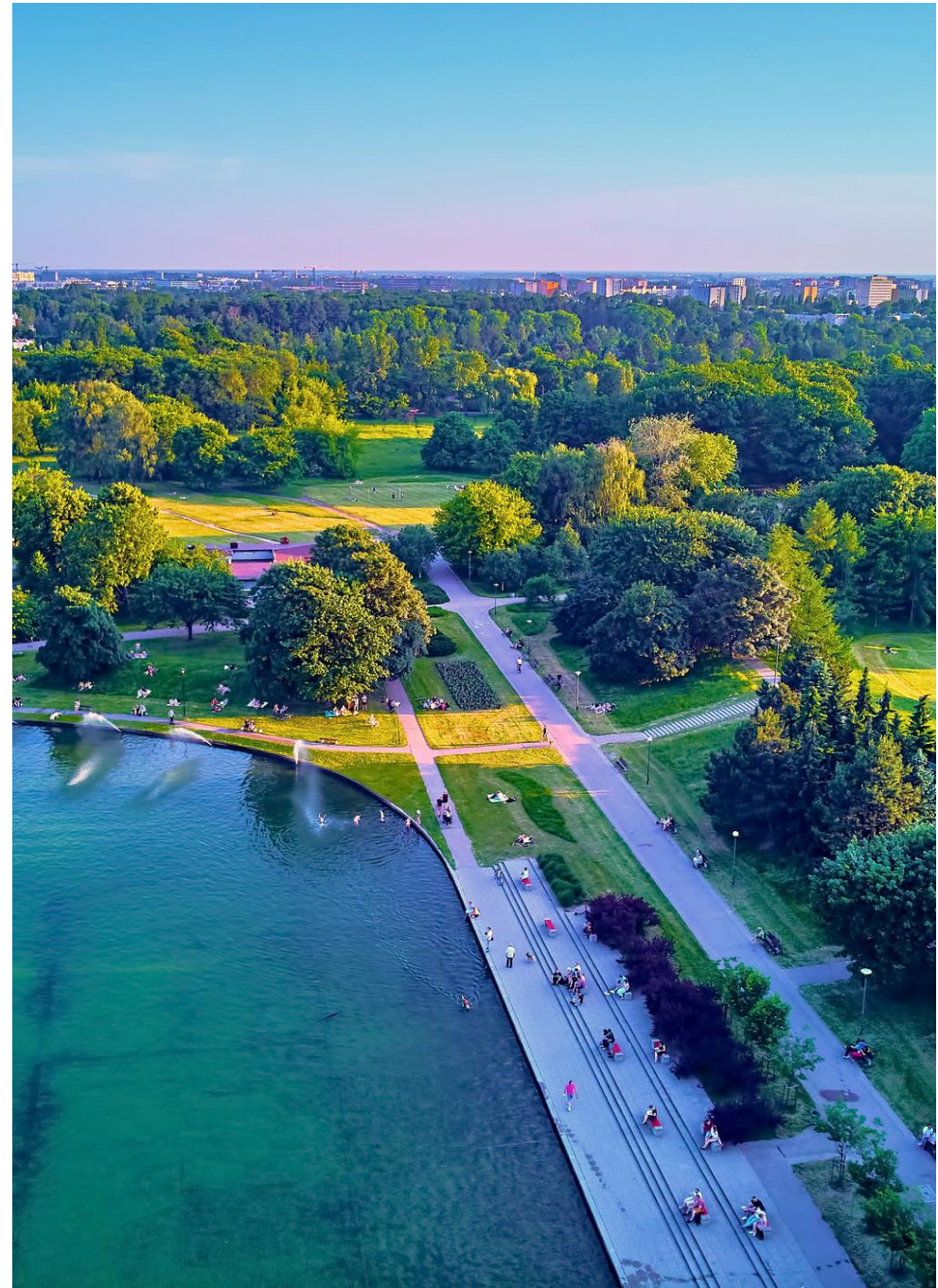
Netherlands

KRZYSZTOF
KUTEK

Water Division Director
at Arcadis

PATRYCJA
STAWARZ

Junior Water Specialist
at Arcadis



WATER MANAGEMENT MARKET RESEARCH REPORT

Krzysztof Kutek, Patrycja Stawarz



AGENDA

1. The organizational structure of water management sector
2. Key problems in the water management sector
3. Key stakeholders and leading players in the water management market in Poland
4. Public procurement law

An aerial photograph of a city, likely Budapest, showing a wide river (Danube) with large, flat floodplains on either side. The city is visible in the background with various buildings and green spaces. The image is overlaid with a semi-transparent orange filter.

THE ORGANIZATIONAL STRUCTURE OF WATER MANAGEMENT SECTOR

THE ORGANIZATIONAL STRUCTURE

The following institutions play an important role in this respect:

the Ministry of Infrastructure

**the State Water Holding Polish
Waters, local self-government units**

**the Ministry of Climate and the
Environment**

**the Ministry of Agriculture and Rural
Development**

**the Ministry of Internal Affairs and
Administration**



THE ORGANIZATIONAL STRUCTURE OF WATER MANAGEMENT

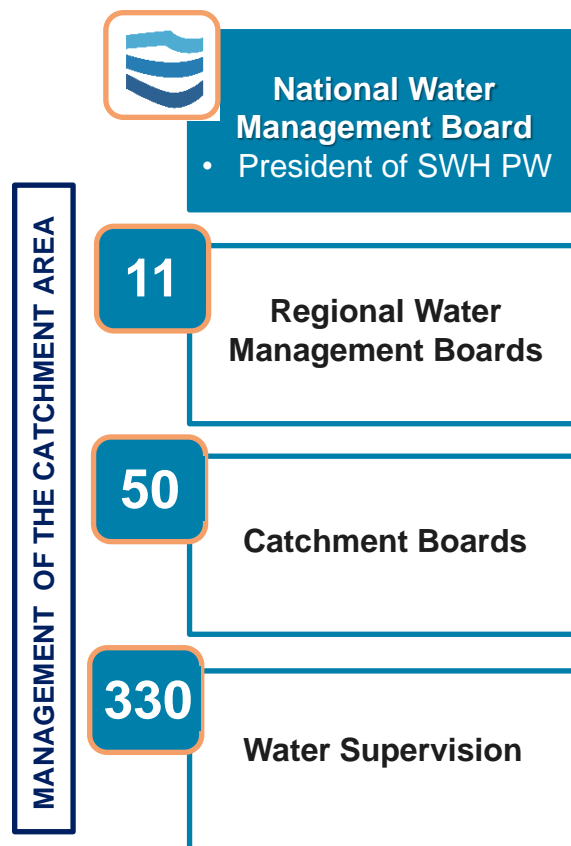


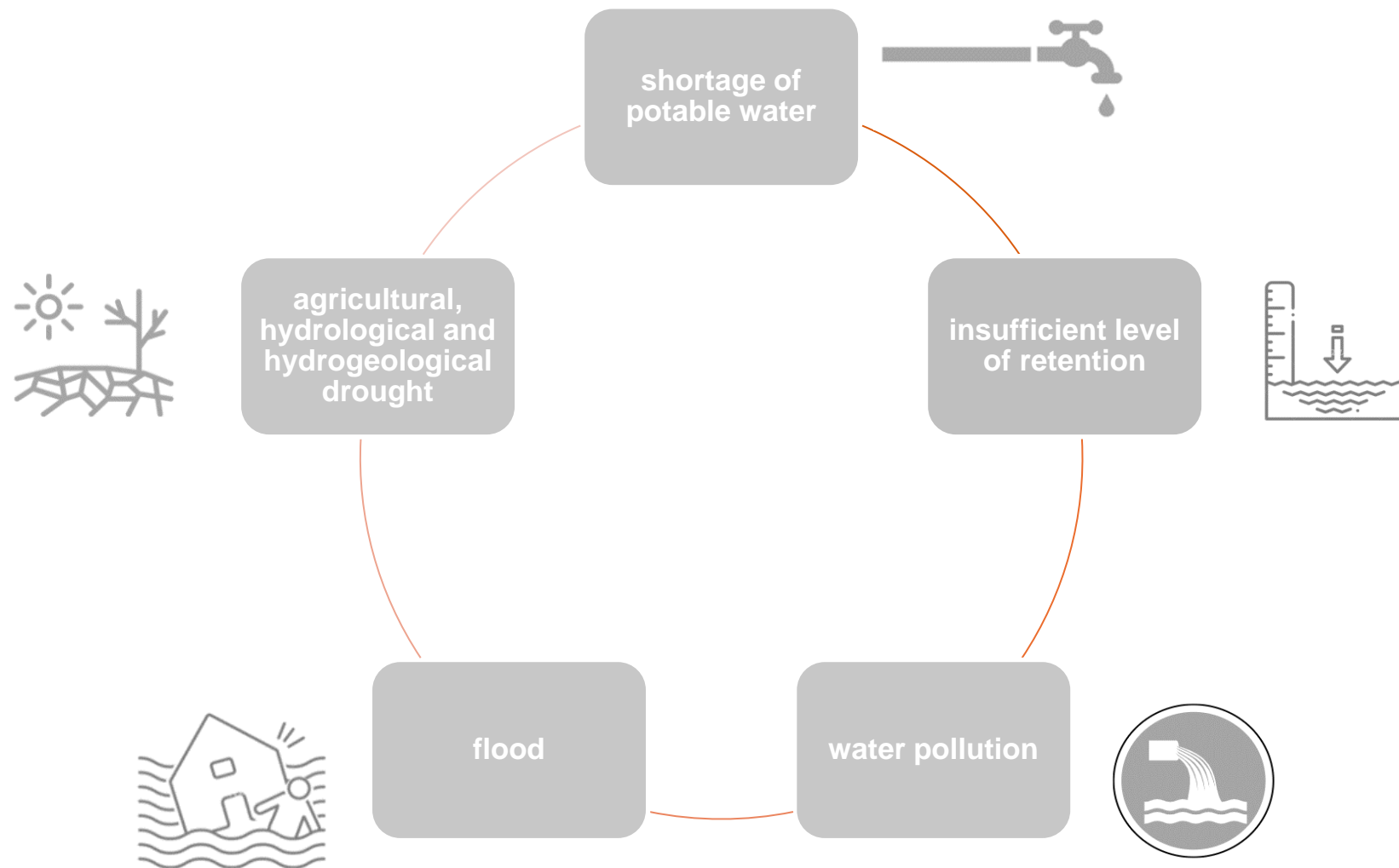
Figure 1 Polish water management organisational structure

Source: own study, based on: (The Official Journal of Laws 2017 item 1566, 2180(14)), (the Official Journal of Laws 2021 item 7(7)-(8))

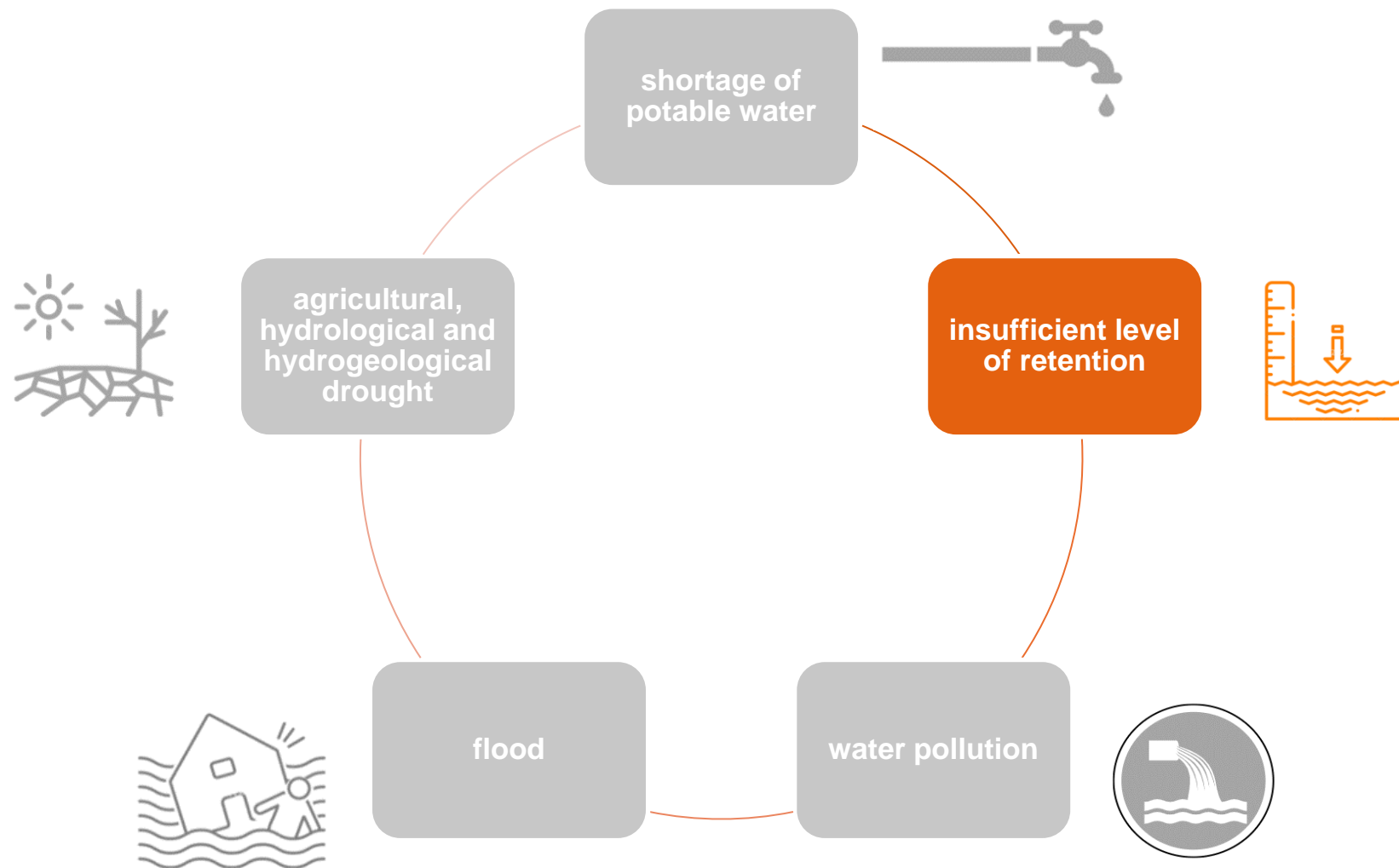


KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR

KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



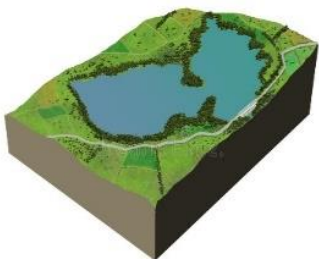
RETENTION – RESPONSE TO DROUGHT AND FLOOD

Physiographic conditions make it possible to store 15% of the average annual runoff of our water:

- in Poland, this indicator is about 6.5%,
- in the neighbouring countries this indicator is much higher than 10%.

Low level of water retention is mainly caused by:

- economic development in the areas prone to flooding;
- progressive urbanization, regulation of rivers and streams;
- locating dikes too close to rivers.



RETENTION IN RESPONSE TO DROUGHT AND FLOOD



The Drought Effects Counteracting Plan specifies a list of investments within the scope of:

- drought prevention - 78 actions,
- shaping the riverbed retention (small retention) - 334 tasks,
- actions reported during public consultations - 182 investments,
- the total value of these investments is over EUR 2.4 billion.



**stop
suszy!**

RETENTION IN RESPONSE TO DROUGHT AND FLOOD



Feel the climate! - Urban Climate Change Adaptation Plans

- one of its key activities is shaping the urban spatial policy taking into account climate change,
- the Ministry of the Environment has decided to develop climate change adaptation plans for 44 largest urban centres,
- the vast majority of cities identified water management as a vulnerable sector requiring urgent action (29 out of 44 cities).

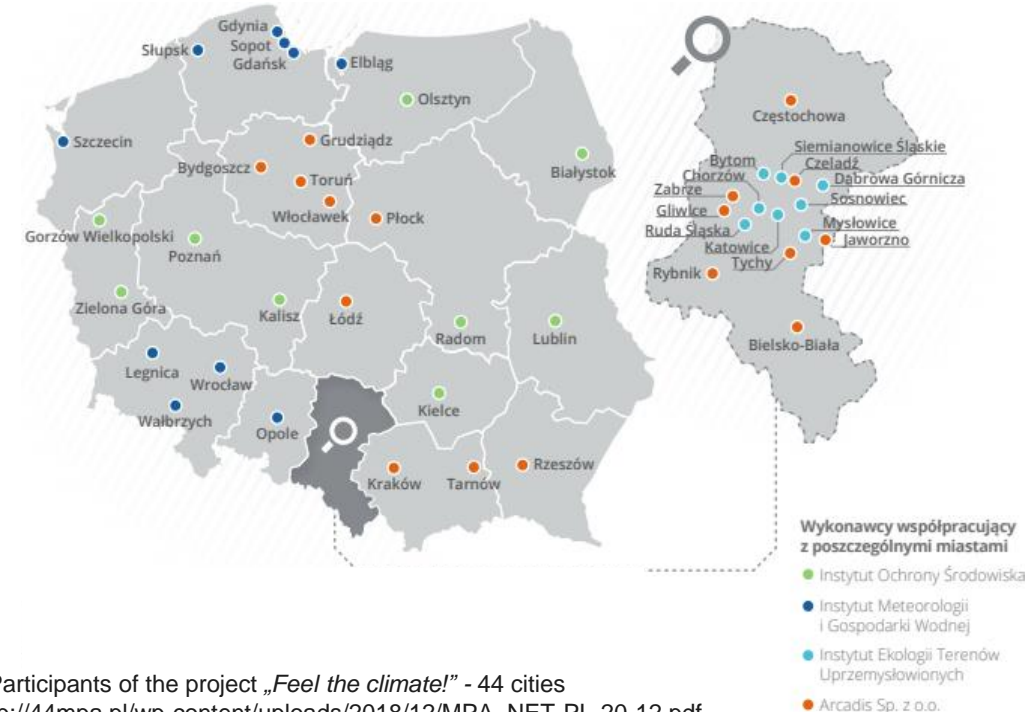


Figure 4 Participants of the project „Feel the climate!” - 44 cities
Source: http://44mpa.pl/wp-content/uploads/2018/12/MPA_NET-PL-20-12.pdf

RETENTION IN RESPONSE TO DROUGHT AND FLOOD



FOREST RETENTION

- The State Forests in Poland contribute to this protection of water management, and they mainly deal with the so-called small retention;
- The State Forests undertook the implementation of projects related to small forest retention in lowland and mountain areas, as a result of which 2,200 investments are expected to be completed by 2022.
- the organization does not plan another edition of this programme in the near future.



**FOR FOREST
FOR PEOPLE**

RETENTION IN RESPONSE TO DROUGHT AND FLOOD

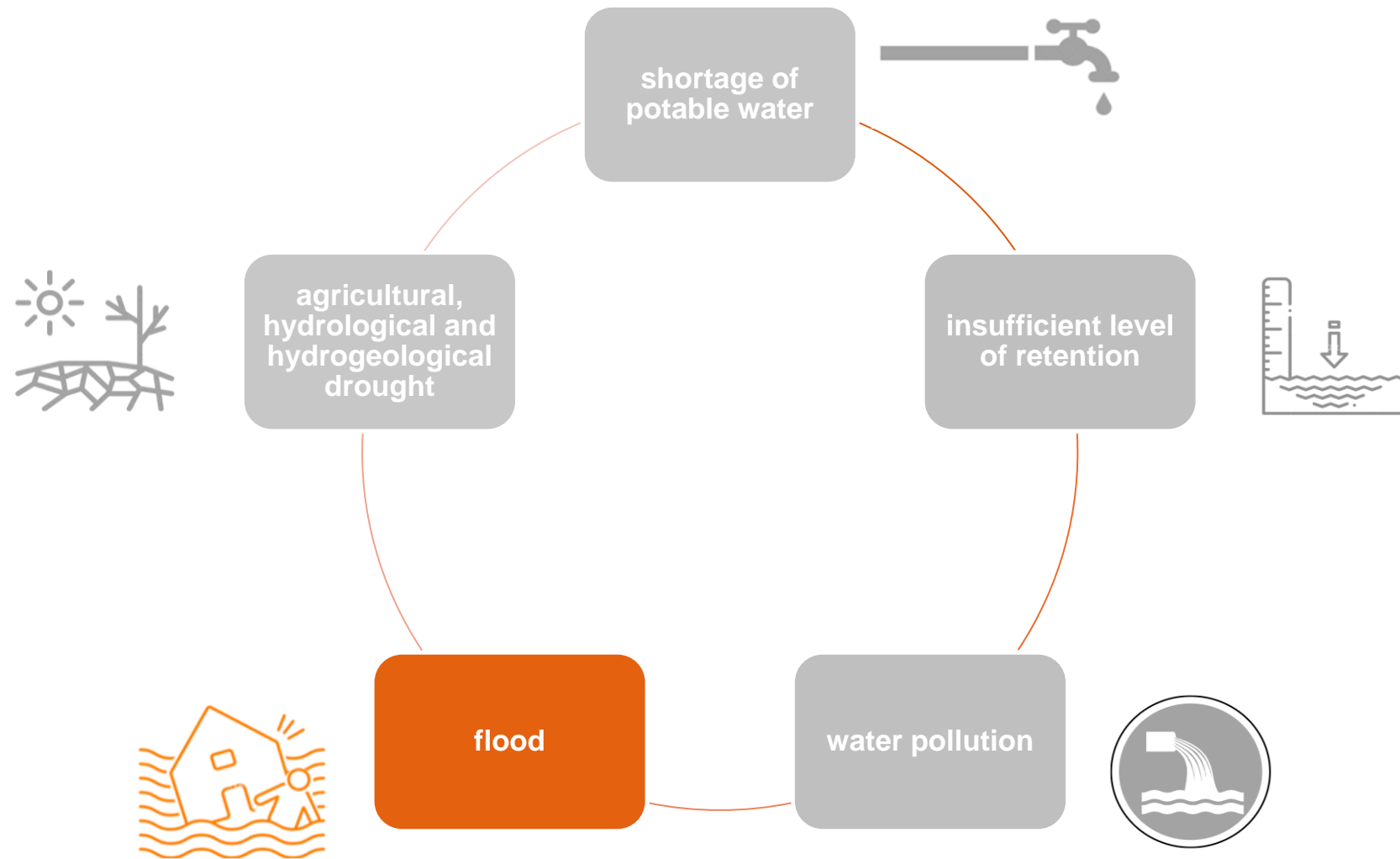


My Water 2.0

- EUR 22.5 million in activities contributing to mitigating effects of droughts by building household rainwater retaining installations
- the programme is dedicated to private owners and includes home installations.



KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



FLOODS



Key

- Flood risk areas 10%
- Areas at risk of flooding
- Medium flood risk areas
- Flood-free areas

Several problems related to securing flood-prone areas:

- poor condition of infrastructure,
- insufficient financial resources which could cover the costs of preventive measures,
- Polish cities are not at all prepared for sudden and intense rainfall and effective collection or discharge of large amounts of rainwater.

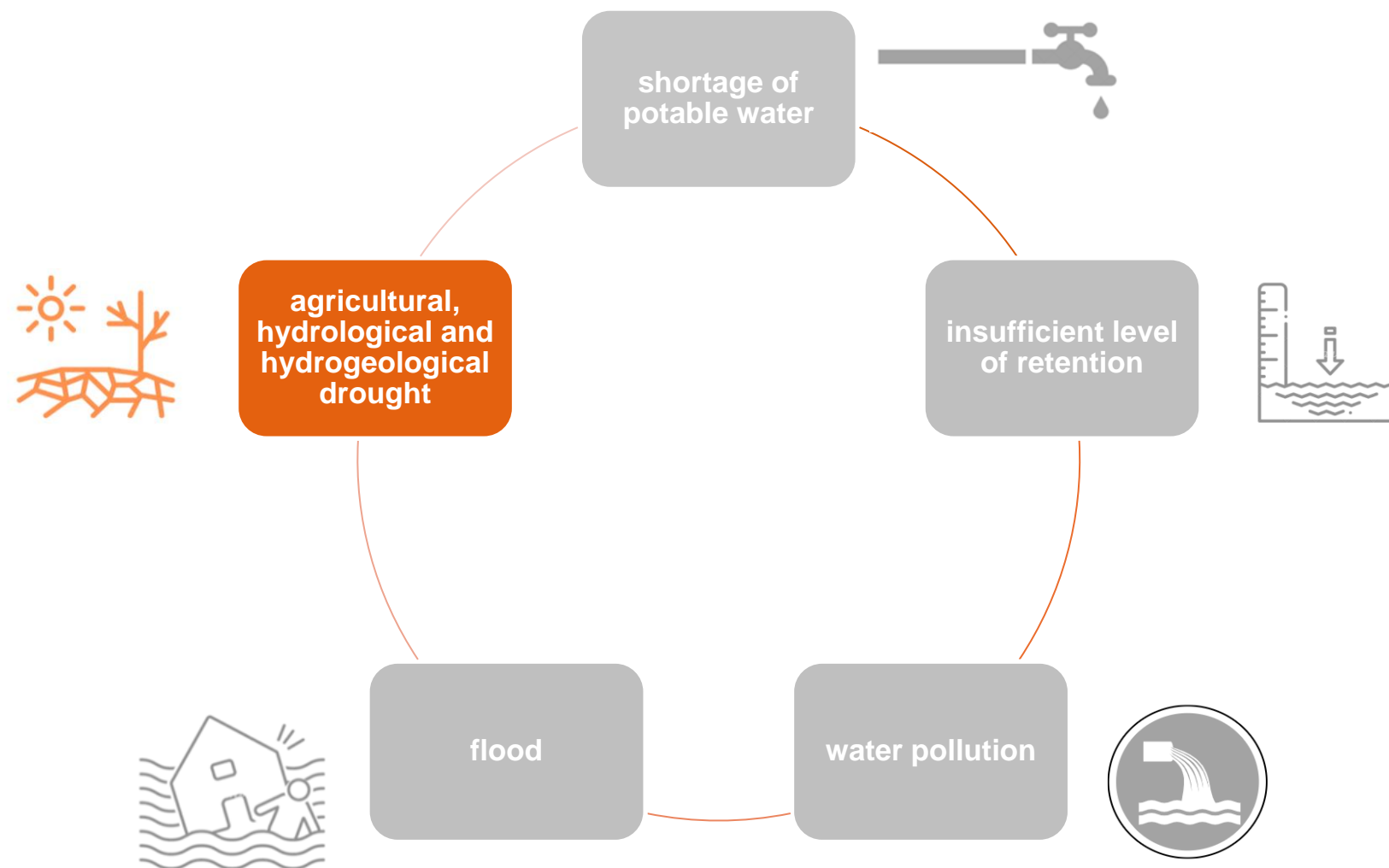
SOLUTIONS



Figure 2 A map of areas at risk of flooding

Source: own study, based on: <https://www.nn.pl/blog/posts/2020/powodzie-w-polsce-jak-sie-zabezpieczyc.html>

KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



DROUGHT

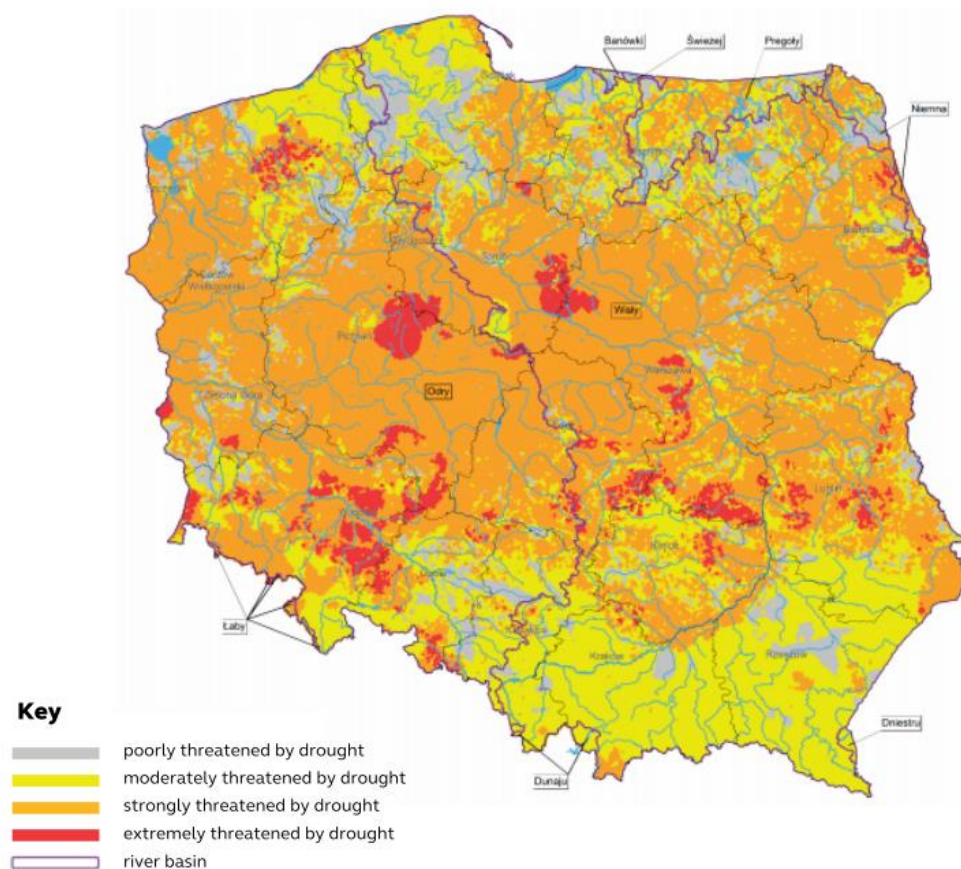


Figure 3 A map of the total risk of agricultural, hydrological and hydrogeological drought
Source: 'Stop Drought! 2020 - Report on the period from the worst drought for the last 50 years to the increase in retention'.

SOLUTIONS

small retention

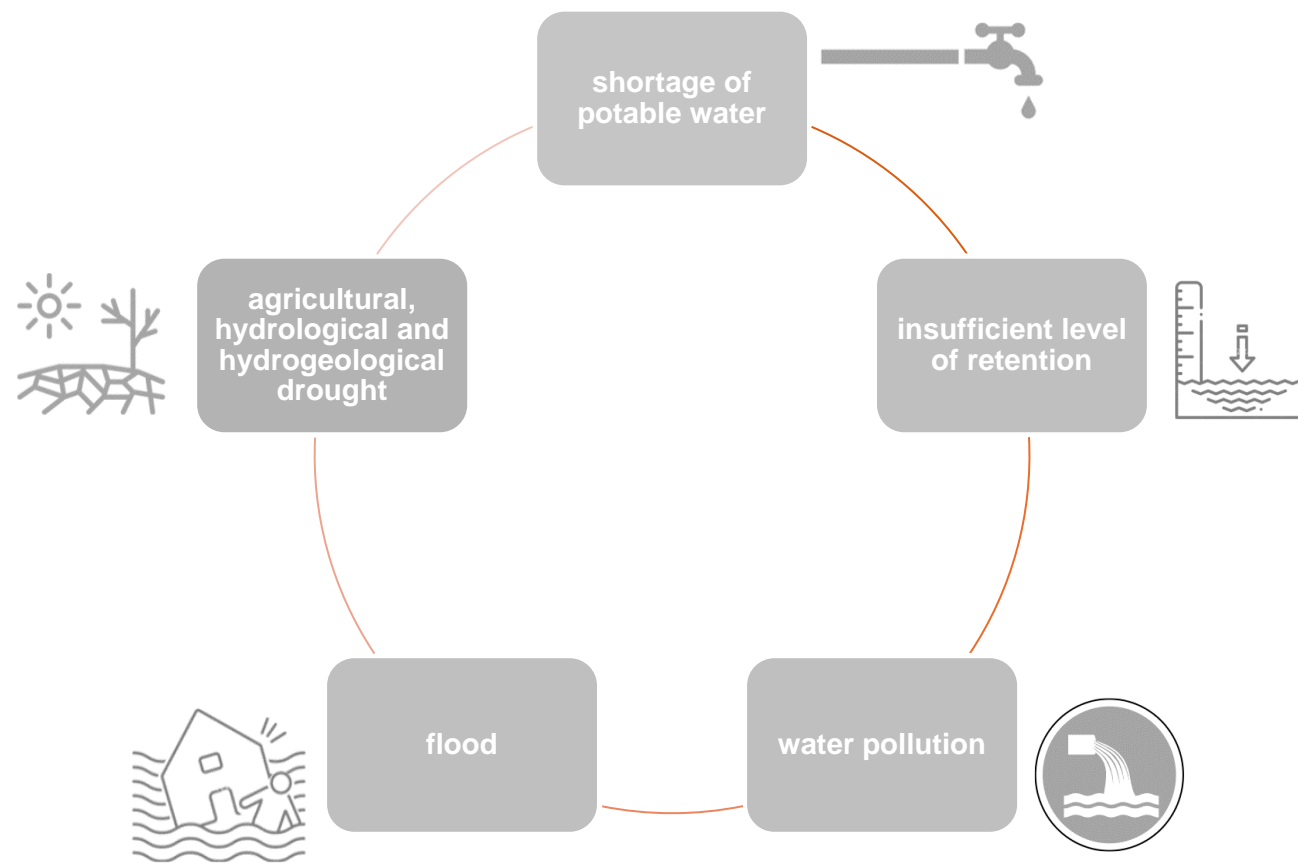
restoring rivers

small and large
multi-functional
reservoirs

The Drought
Effects
Counteracting
Plan

spatial planning
of agglomerations

KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



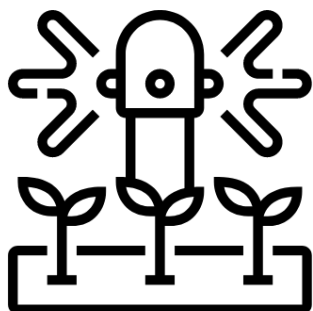
Niche areas



KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR

NICHE AREAS

AGRICULTURE IRRIGATION



- changing the approach;
- purchase of machinery and equipment for water abstraction, storage, treatment, recovery, or distribution;
- introduction of a closed water circuit.

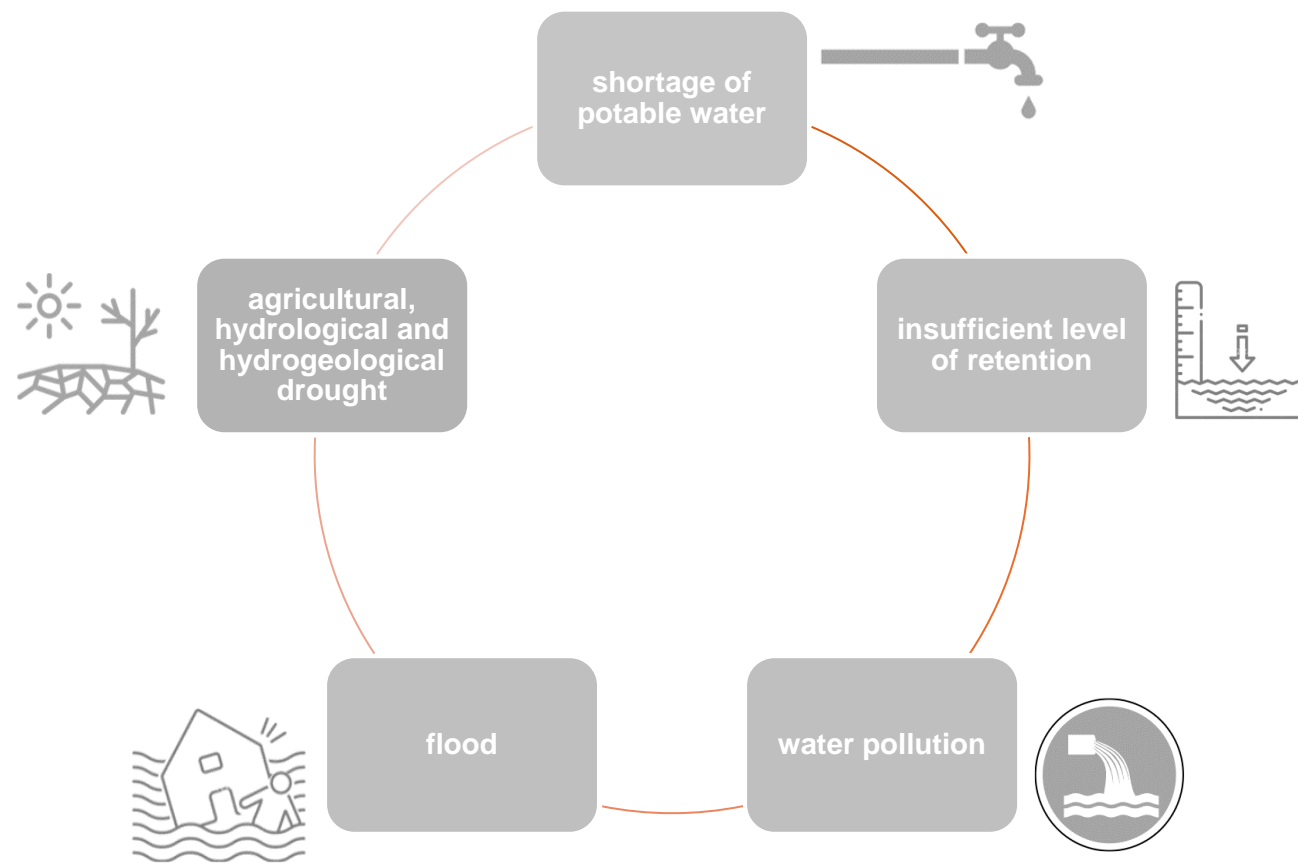


CIRCULAR ECONOMY



- improving the efficiency of its use in the form of grey water;
- collecting and storing rainwater in households;
- saving water as a resource in the commune economy,
- reducing consumption of primary raw materials, including water, in production processes per production unit.

KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



Shortage of funds



FINANCING SOURCES OF INVESTMENTS IN WATER MANAGEMENT

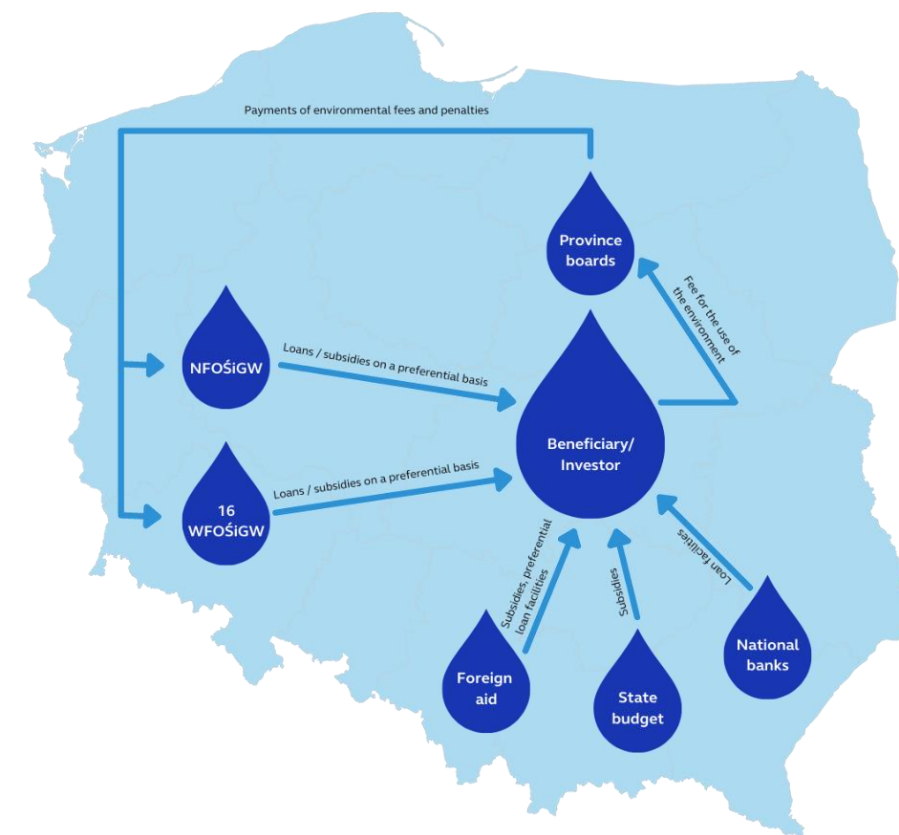
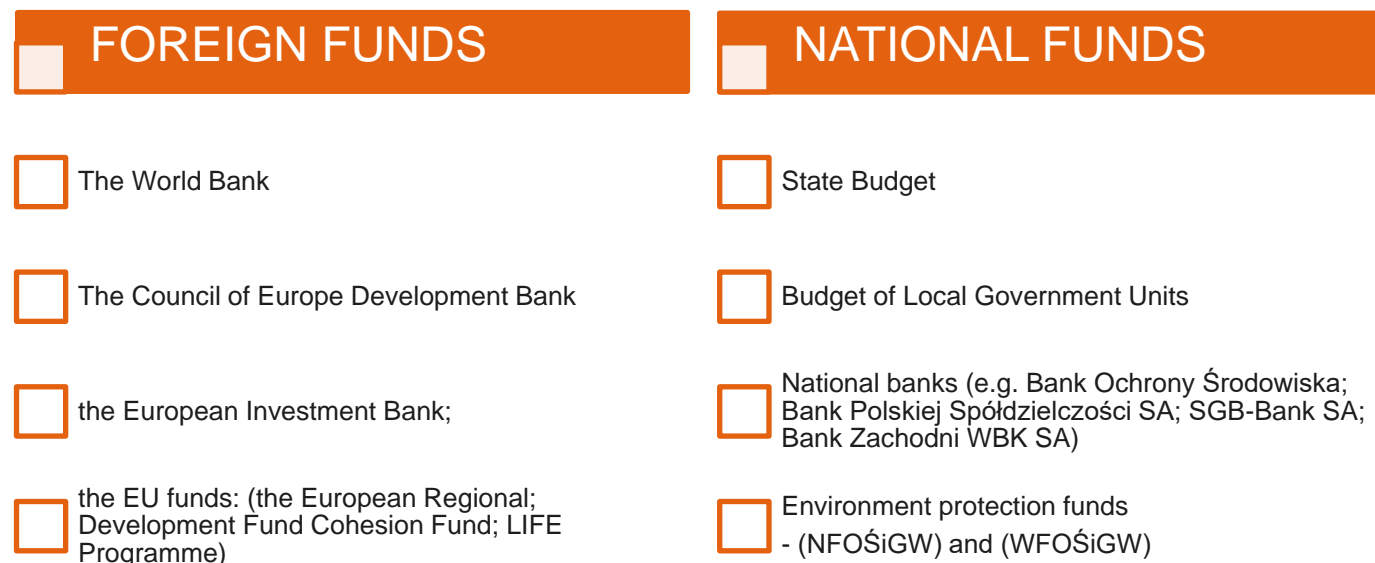


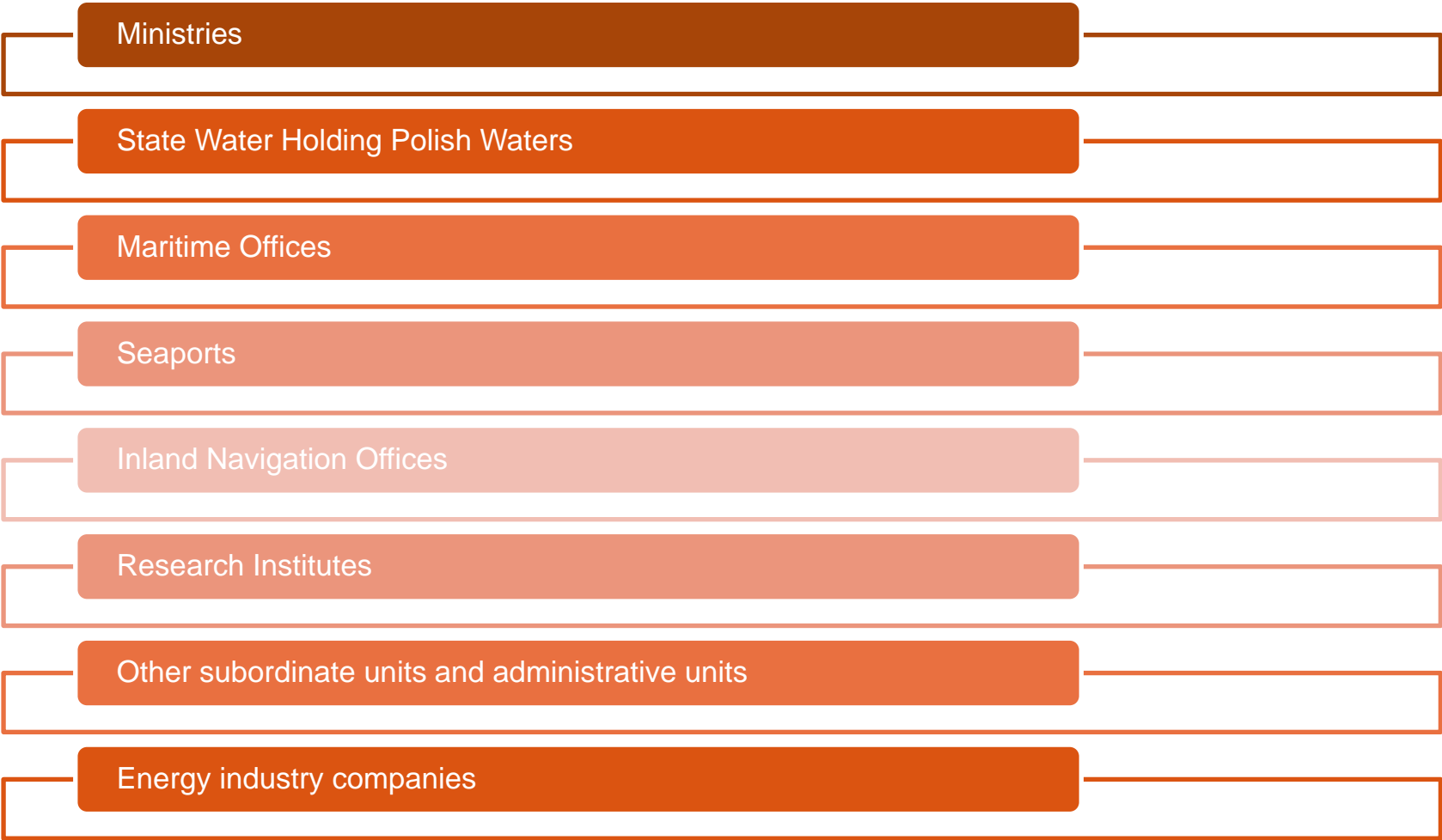
Figure 5 A general diagram of the system and main sources of financing of water management in Poland

Source: own study, based on the Environmental Protection Financing System in Poland

An aerial photograph of a large, calm lake surrounded by lush green hills and a small town with red-roofed houses. The sky is filled with soft, white clouds. The text is overlaid in the center-left of the image.




KEY STAKEHOLDERS AND LEADING PLAYERS IN THE WATER MANAGEMENT MARKET IN POLAND

Key clients



Leading contractors in the water management market in Poland

Explanations:

	Competences held
	No clear information
	No information on conducting activities within this scope

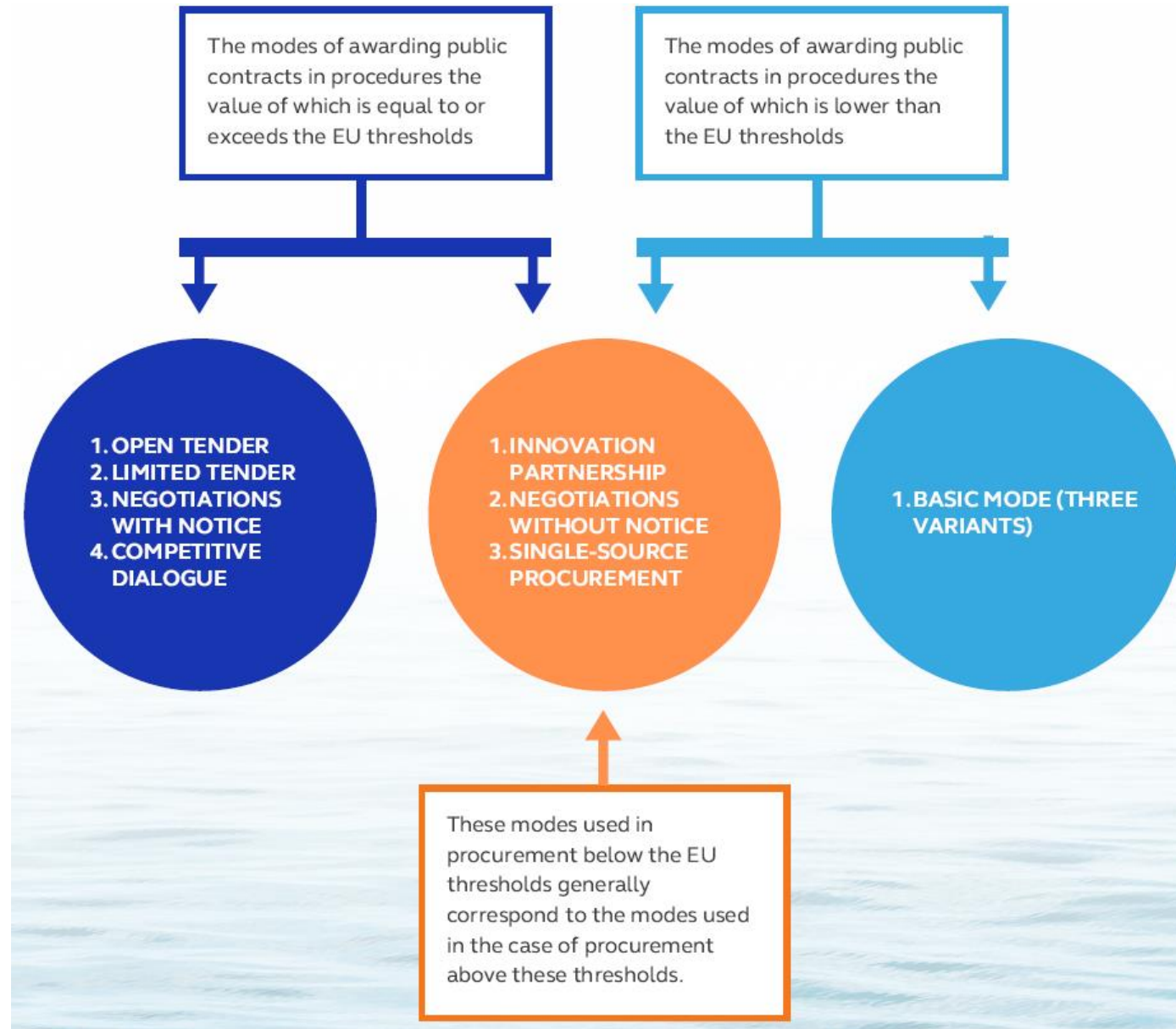
Name	Country	strategic document	hydrotechnology	water quality	RES	sewage systems, water supply	surface water	climate change
AECOM ← click	USA							
Antea Group ← click	The Netherlands							
AQUA SA ← click	Poland							
AquaSEEN ← click	Poland							
ARCADIS ← click	The Netherlands							
ARUP ← click	The UK							
CDM Smith ← click	USA							
COWI Poland ← click	Denmark							
DHI ← click	Denmark							
Ekonctrum ← click	Poland							
Ekovert ← click	Poland							
FPP ENVIRO ← click	Denmark							
GRUPA NDI ← click	Poland							
HaskoningDHV Poland Sp. z o.o. ← click	The Netherlands							
Hydroconsult ← click	Poland							
Hydroprojekt Wrocław ← click	Poland							
ILF ← click	Austria							
Institute of Meteorology and Water Management - National Research Institute ← click	Poland							
Institute of Environmental Protection - National Research Institute ← click	Poland							
RES Institute ← click	Poland							
Jacobs Engineering Group Inc. ← click	USA							
MGGP ← click	Poland							
Mott MacDonald Polska Sp. z o.o. ← click	The UK							
Multiconsult ← click	Norway							
Nijhuis WT ← click	The Netherlands							
Pectore-Eco ← click	Poland							

An aerial photograph of a city, likely Bratislava, Slovakia, showing a dense urban area with many buildings and a river (Danube) flowing through it. A bridge crosses the river, and a roundabout with a central monument is visible in the foreground. The text 'PUBLIC PROCUREMENT LAW' is overlaid in large white letters.

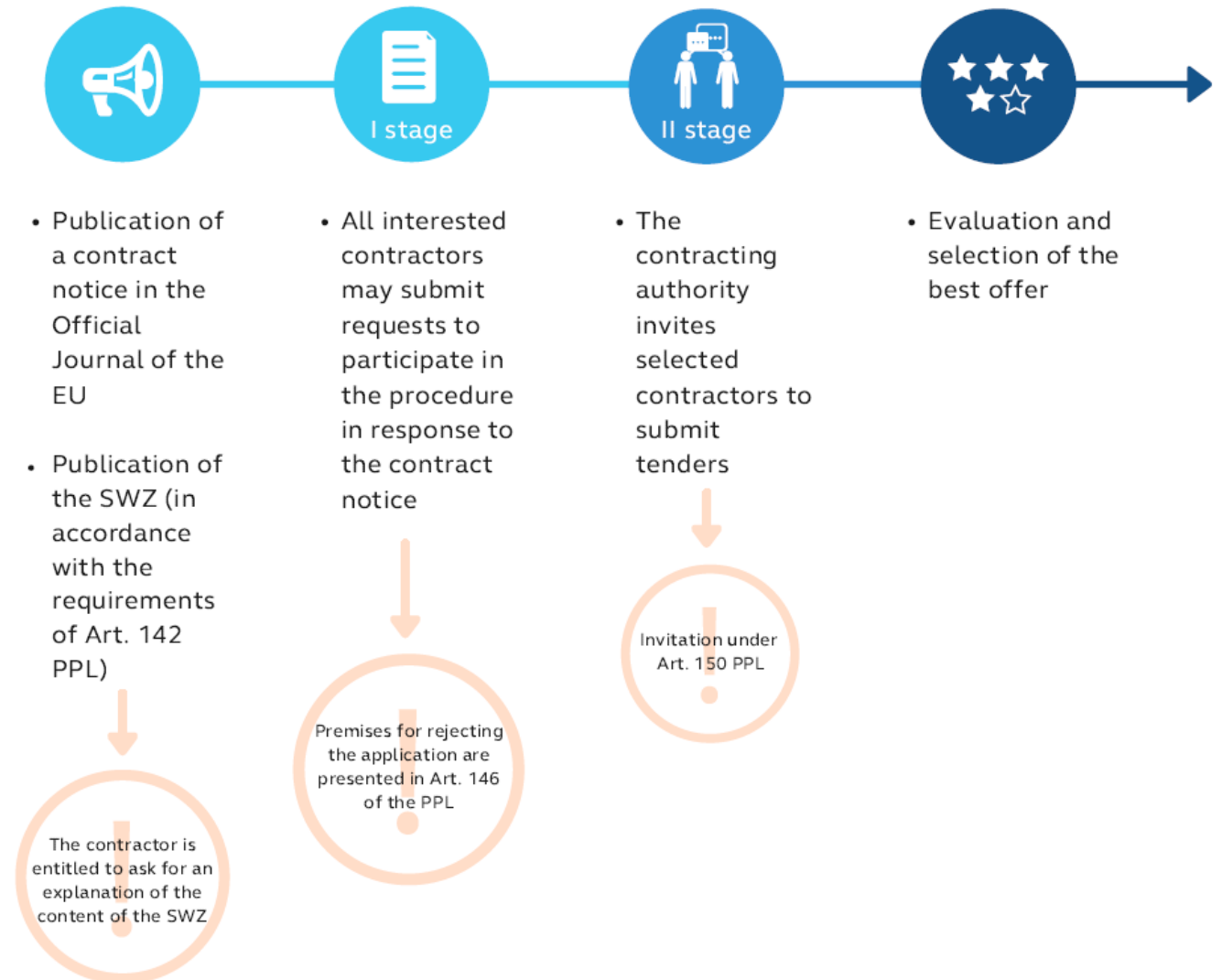
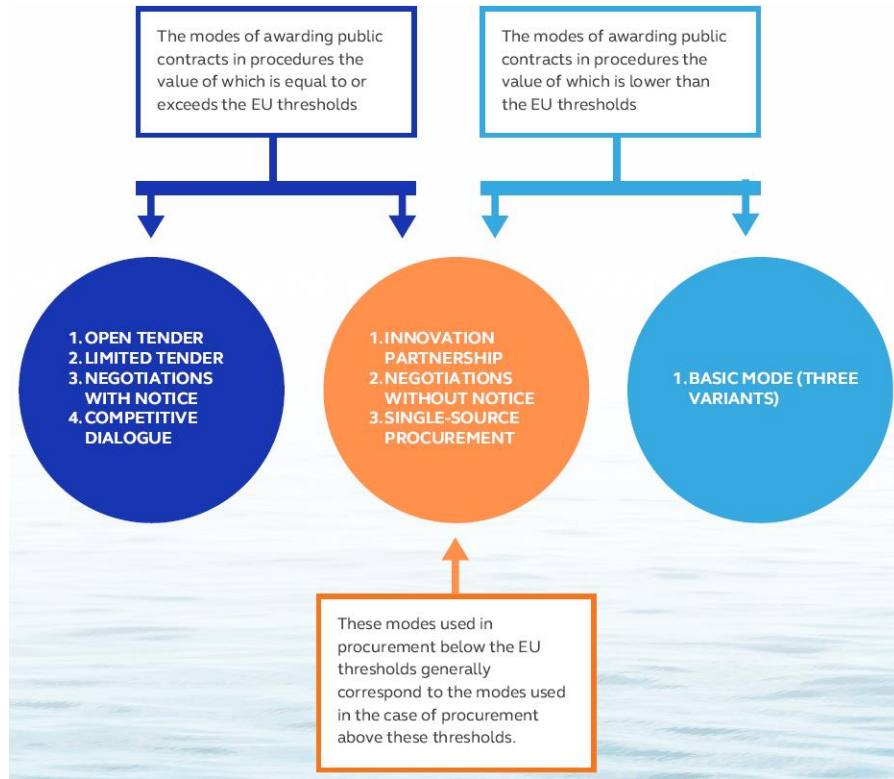
PUBLIC PROCUREMENT LAW

- Modes of awarding public contracts
- Participating in tender procedures
- Summary and recommendations

PPL– modes of awarding public contracts



PPL– modes of awarding public contracts



PARTICIPATING IN TENDER PROCEDURE – step by step

1. Searching for a public procurement notice

2. Analysis of the content of the notice and the Terms of Reference (SWZ)

3. Preparing an offer

4. Submission of the offer

5. Termination of the procedure

Summary and recommendations



THANK YOU FOR YOUR ATTENTION



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Improving quality of life.

Agenda Monday 21 June

10:50 Break

11.00 Water Financing opportunities

13:30 Matchmaking

18:00 End

Agenda Tuesday 22 June

10:30 – 11.30 Drought management

10:30 – 11.30 Water Smart City solutions

13:00 Matchmaking

17:00 End