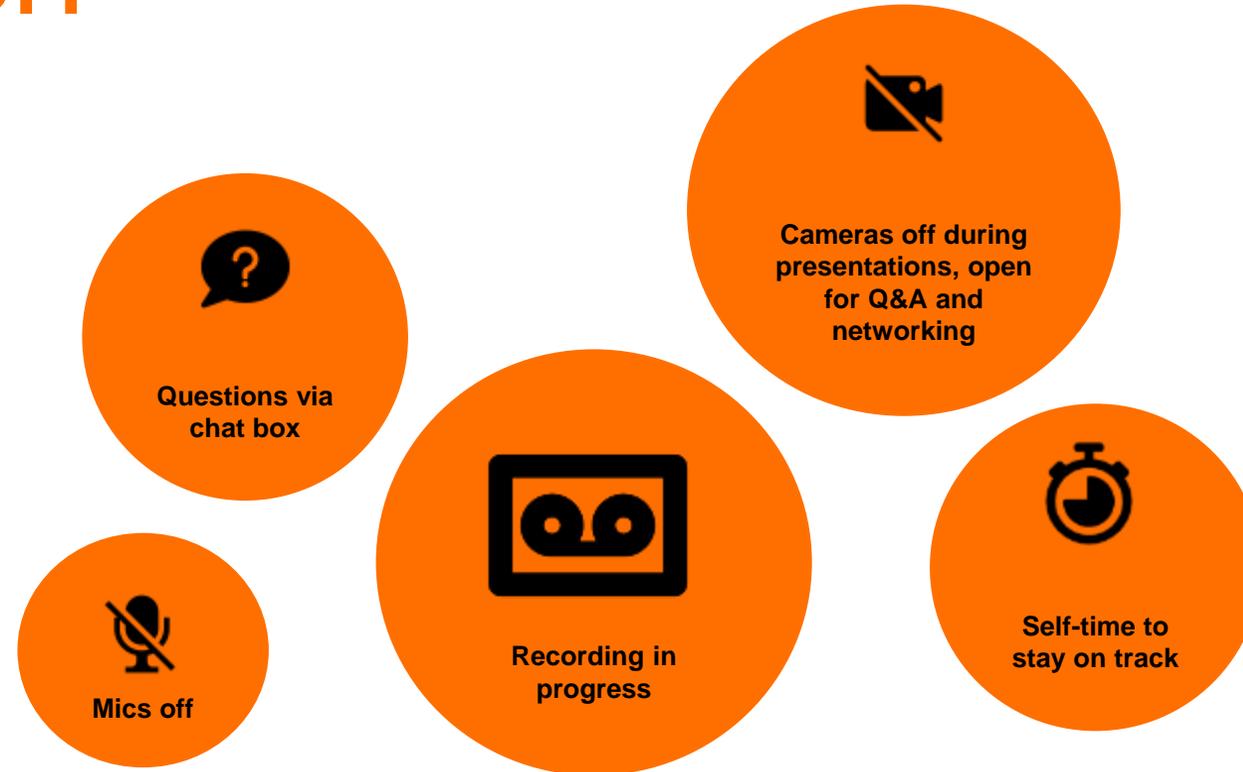


# Help us make it a smooth session



# NL

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

NL



Netherlands

# Bianca Nijhof –

Managing Director  
Netherlands Water  
Partnership (NWP)

**NL**



# Netherlands Water Partnership (NWP)

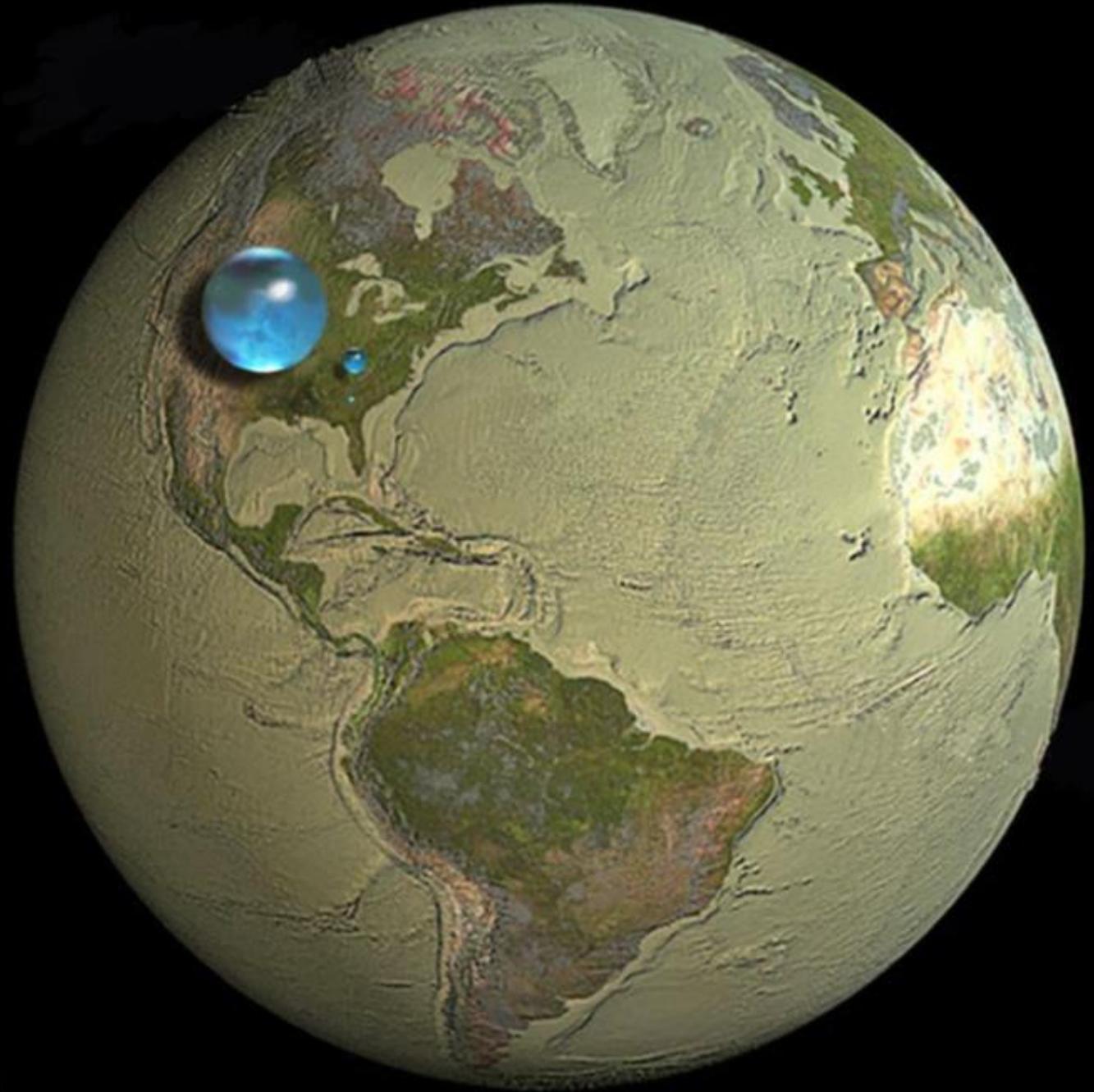
The largest international water network in the Netherlands

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.

 Aeronautics and space	 Agrofood	 BioChemTech	 Creative Industries	 Environment	 Healthcare
 ICT Industry & Services	 Intelligent Energy	 Maritime Industry and Services	 Materials	 Mobility	 Nano and micro technologies
 Retail	 Sustainable Construction	 Textile & Fashion	 Tourism and Cultural Heritage	 Women Entrepreneurship	

# 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](mailto:Janine.kaya@rvo.nl)

W: [www.rvo.nl](http://www.rvo.nl)

W: [een.ec.europa.eu](http://een.ec.europa.eu)  
to find the Network near you



Netherlands

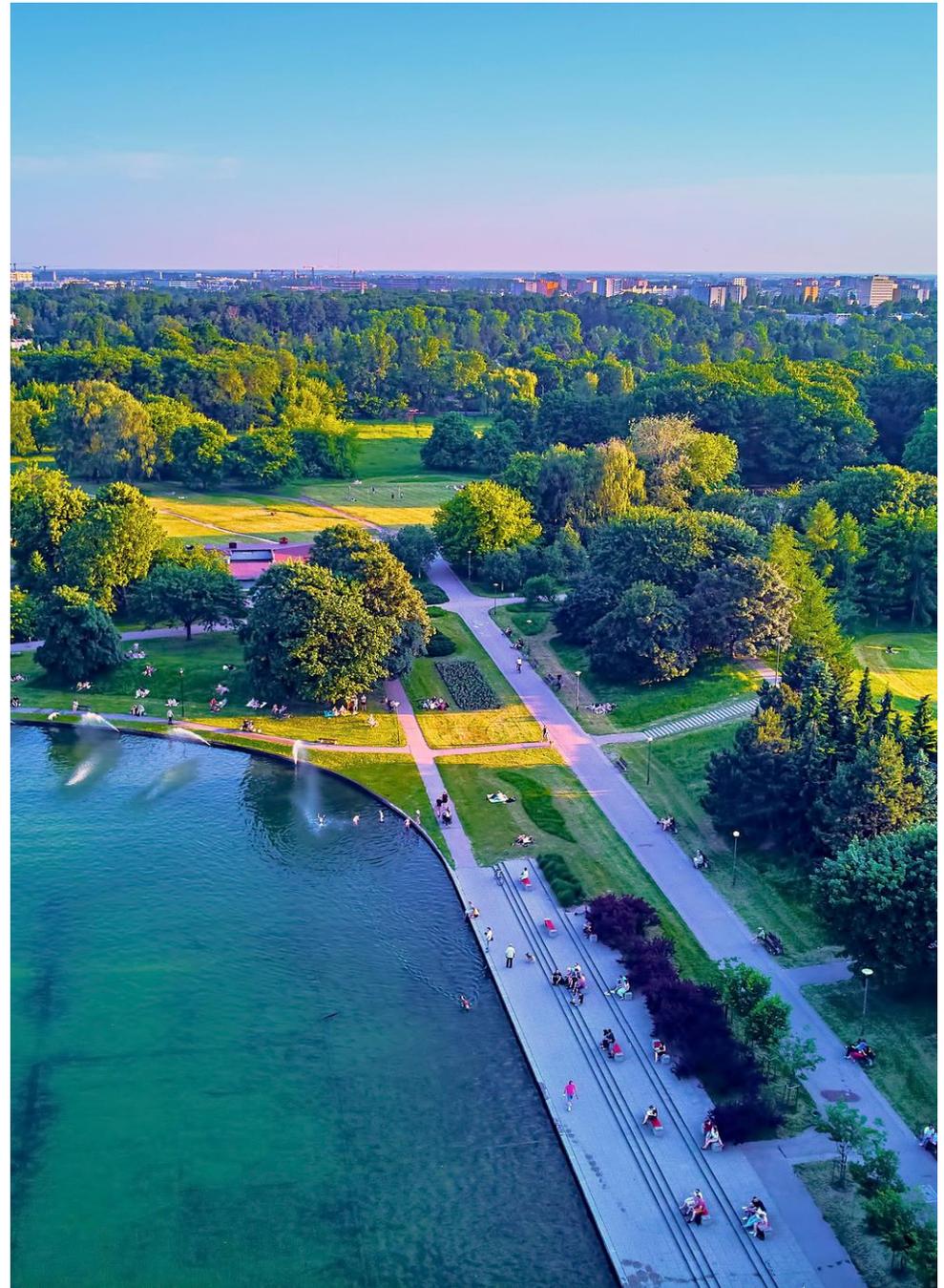
KRZYSZTOF  
KUTEK

Water Division Director  
at Arcadis

PATRYCJA  
STAWARZ

Junior Water Specialist  
at Arcadis

NL



# 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 with a wide river flowing through it. The river is flanked by green spaces and trees. In the background, there are residential buildings and a bridge. The sky is clear and blue.

# 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**

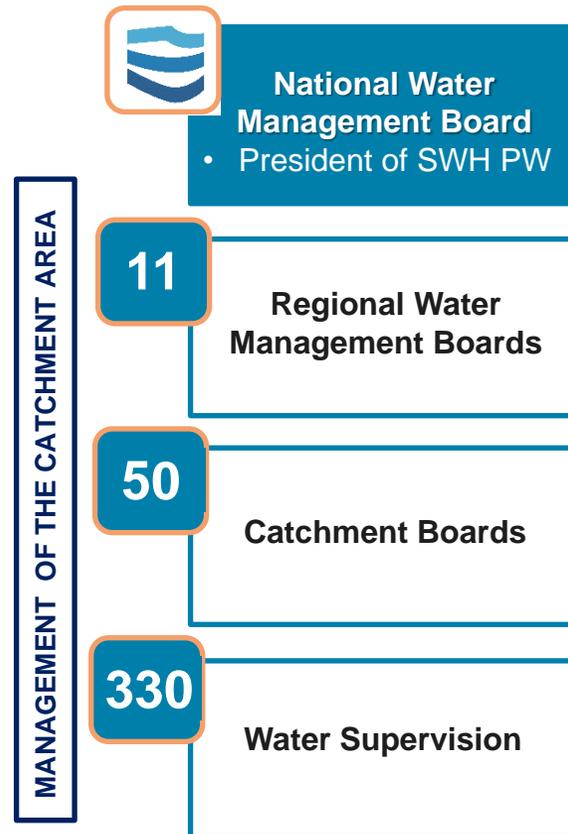
**the Ministry of Climate and the Environment**

**the Ministry of Agriculture and Rural Development**

**the Ministry of Internal Affairs and Administration**



# THE ORGANIZATIONAL STRUCTURE OF WATER MANAGEMENT



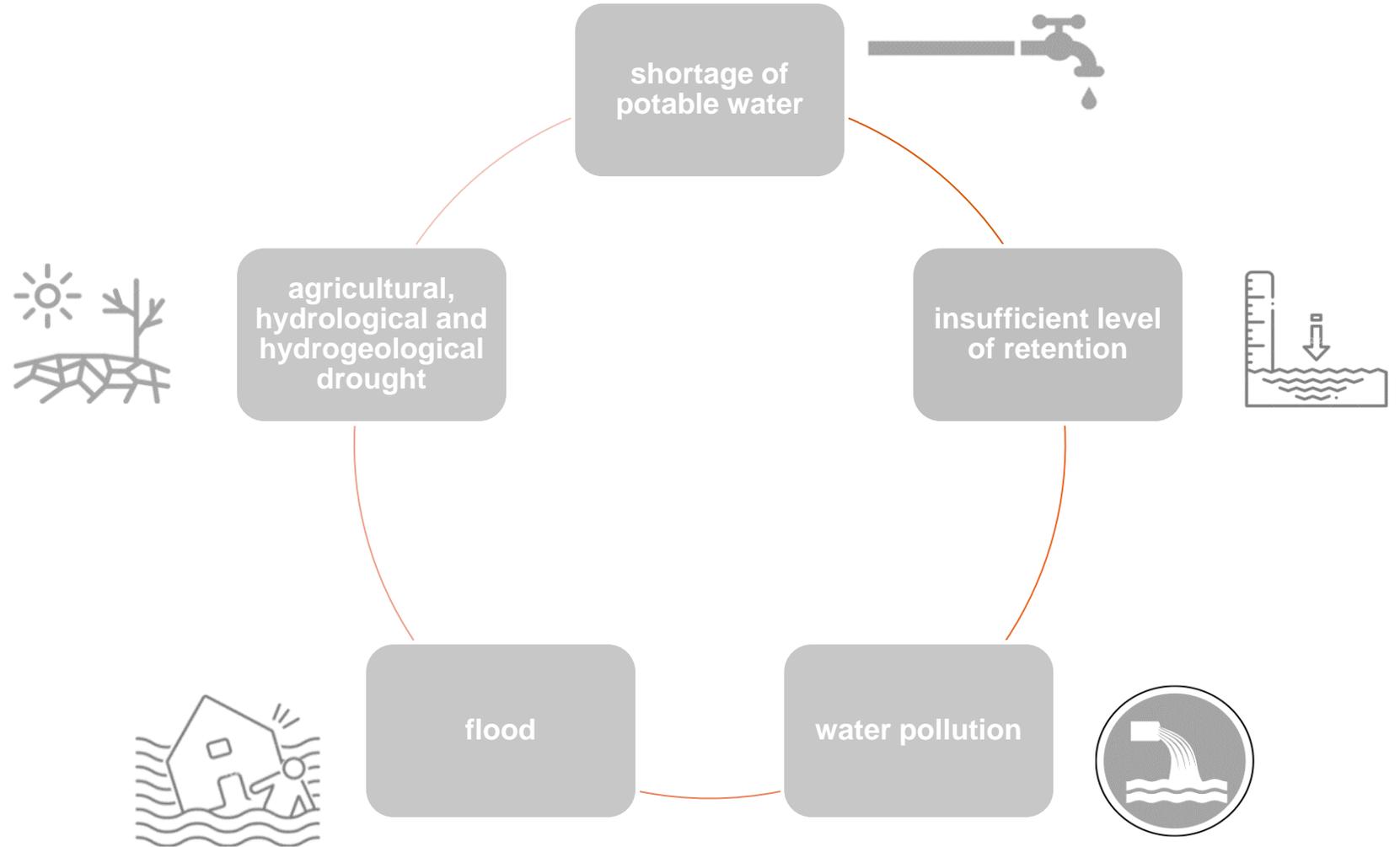
**Figure 1** Polish water management organisational structure

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))

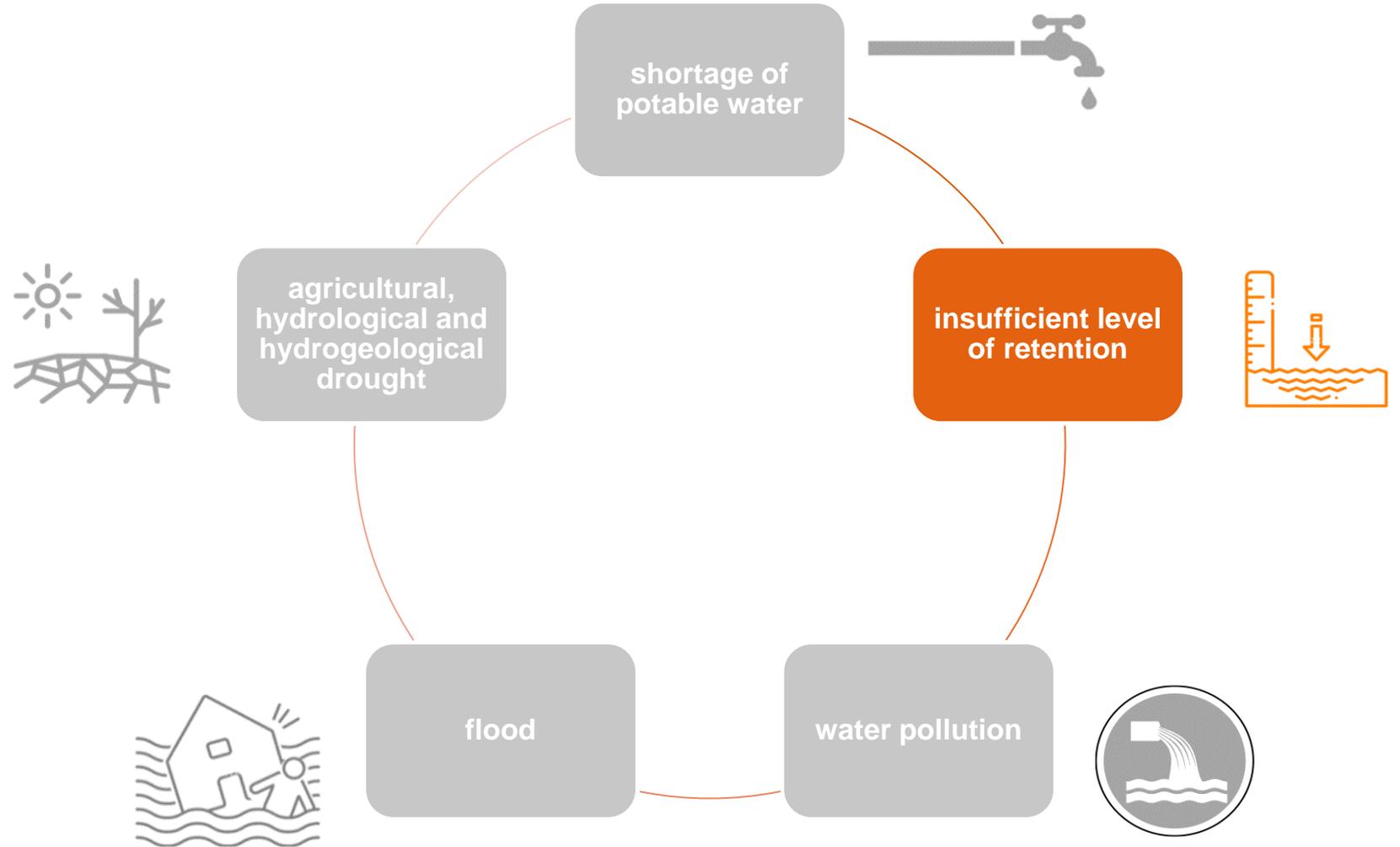
An aerial photograph of a city, likely Trondheim, Norway, featuring a prominent river (Nidelva) winding through the urban landscape. The city is characterized by traditional European architecture, including a large, tall church spire (St. Olavs Church) in the center-right. The foreground shows a bridge over the river with several boats. The background shows a mix of residential and commercial buildings under a clear sky.

# KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR

# KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



# KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



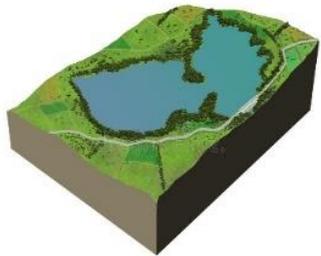
# RETENTION – RESPONSE TO DROUGHT AND FLOOD

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.

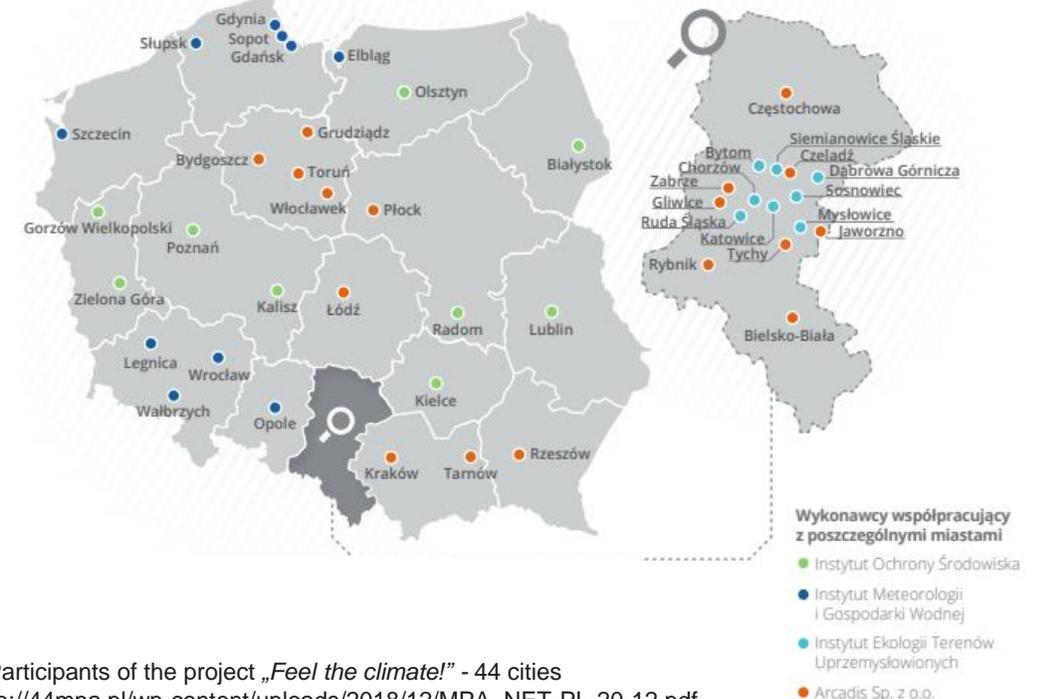
 stop  
suszy!

# 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](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

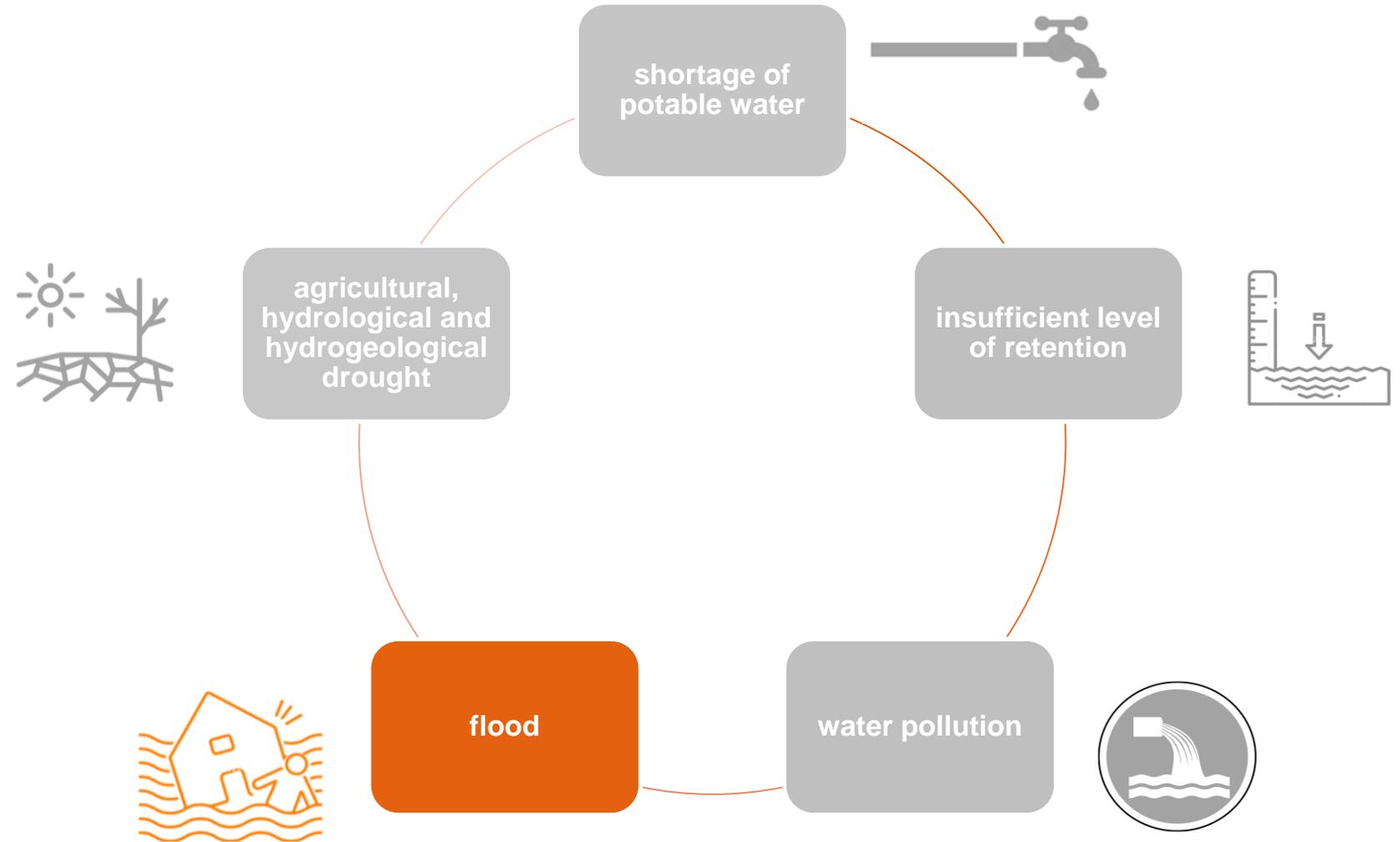


## My Water 2.0

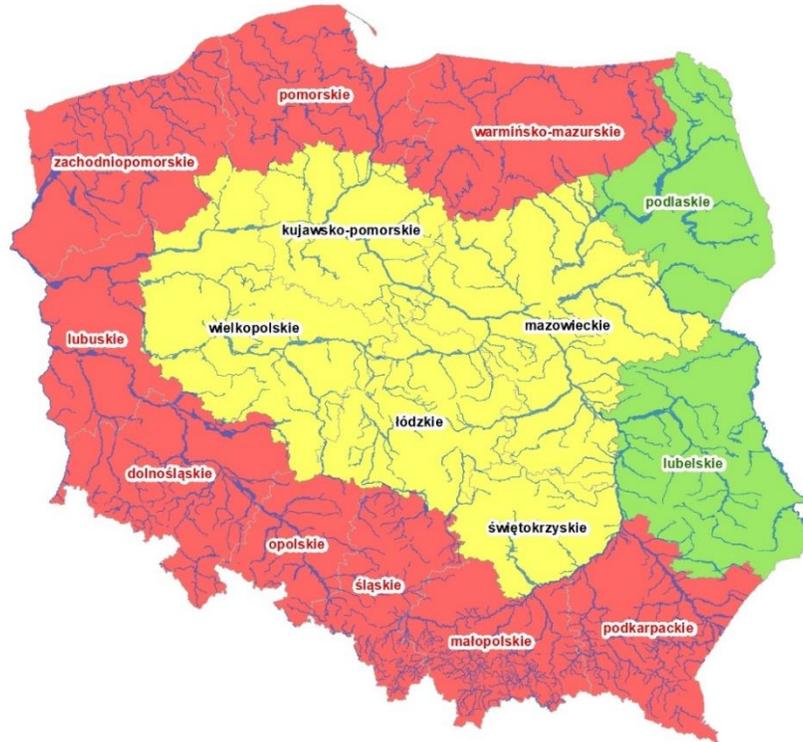
- EUR 22.5 million in activities contributing to mitigating effects of droughts by building household rainwater retaining installations
- the programme is dedicated to private owners and includes home installations.



# 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:**

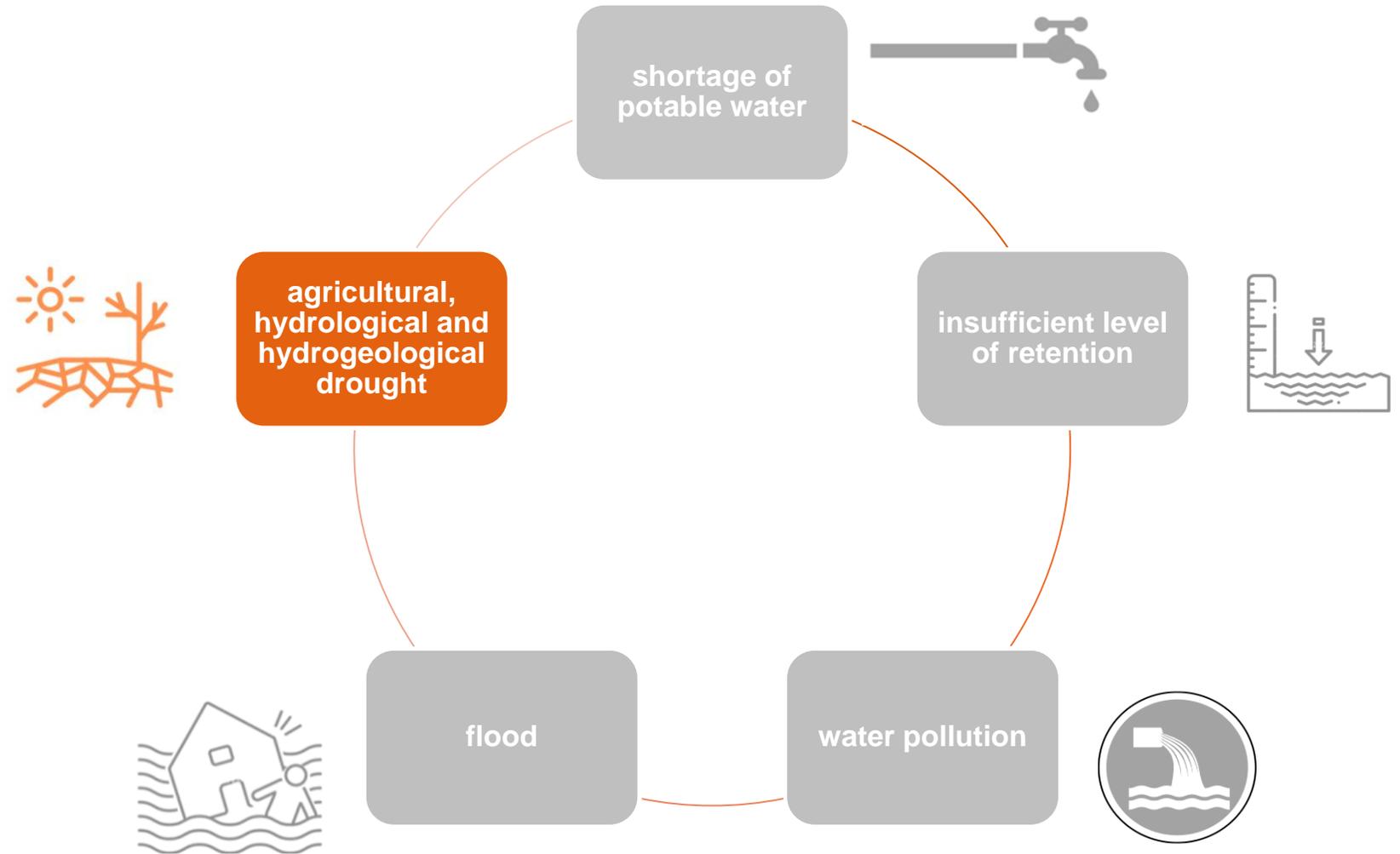
- poor condition of infrastructure,
- insufficient financial resources which could cover the costs of preventive measures,
- Polish cities are not at all prepared for sudden and intense rainfall and effective collection or discharge of large amounts of rainwater.

## SOLUTIONS

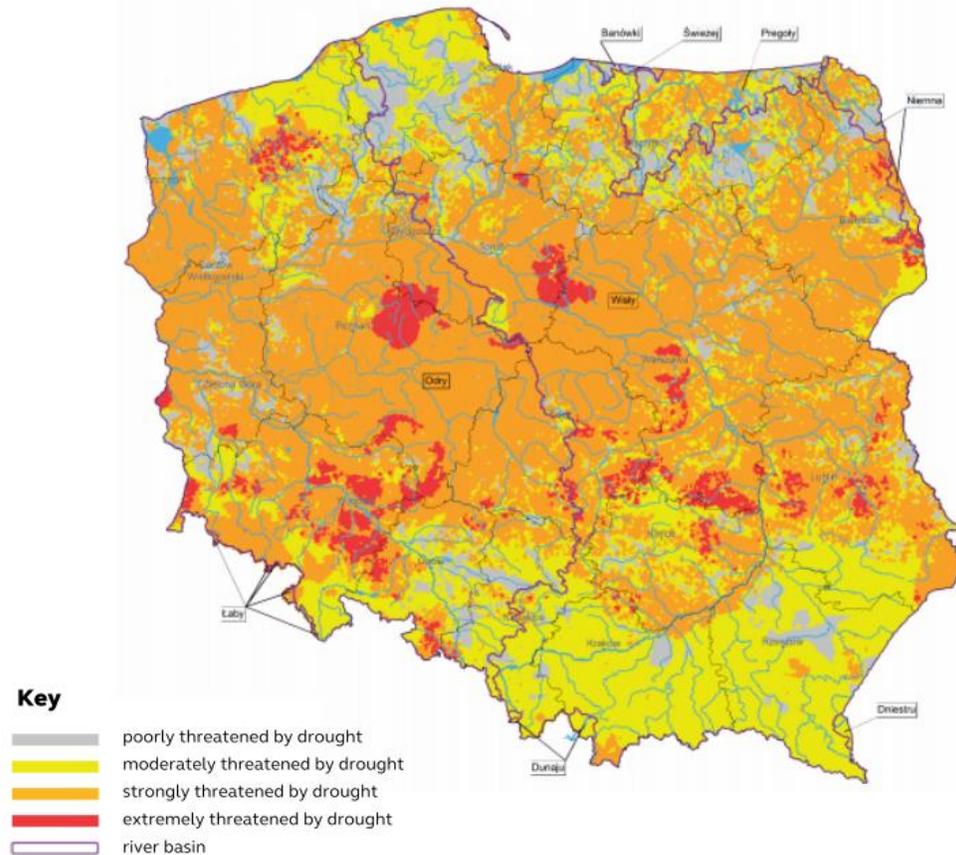


**Figure 2** A map of areas at risk of flooding  
Source: own study, based on: <https://www.nn.pl/blog/posts/2020/powodzie-w-polsce-jak-sie-zabezpieczyc.html>

# KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR

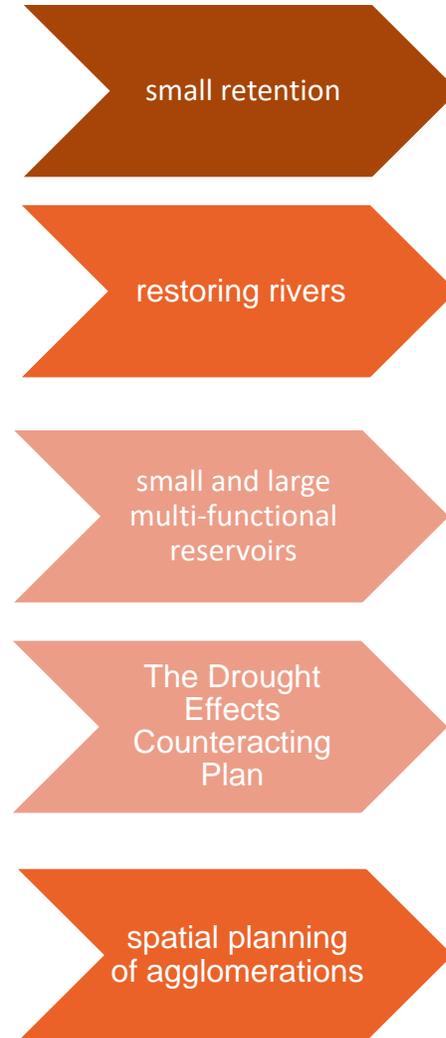


# DROUGHT

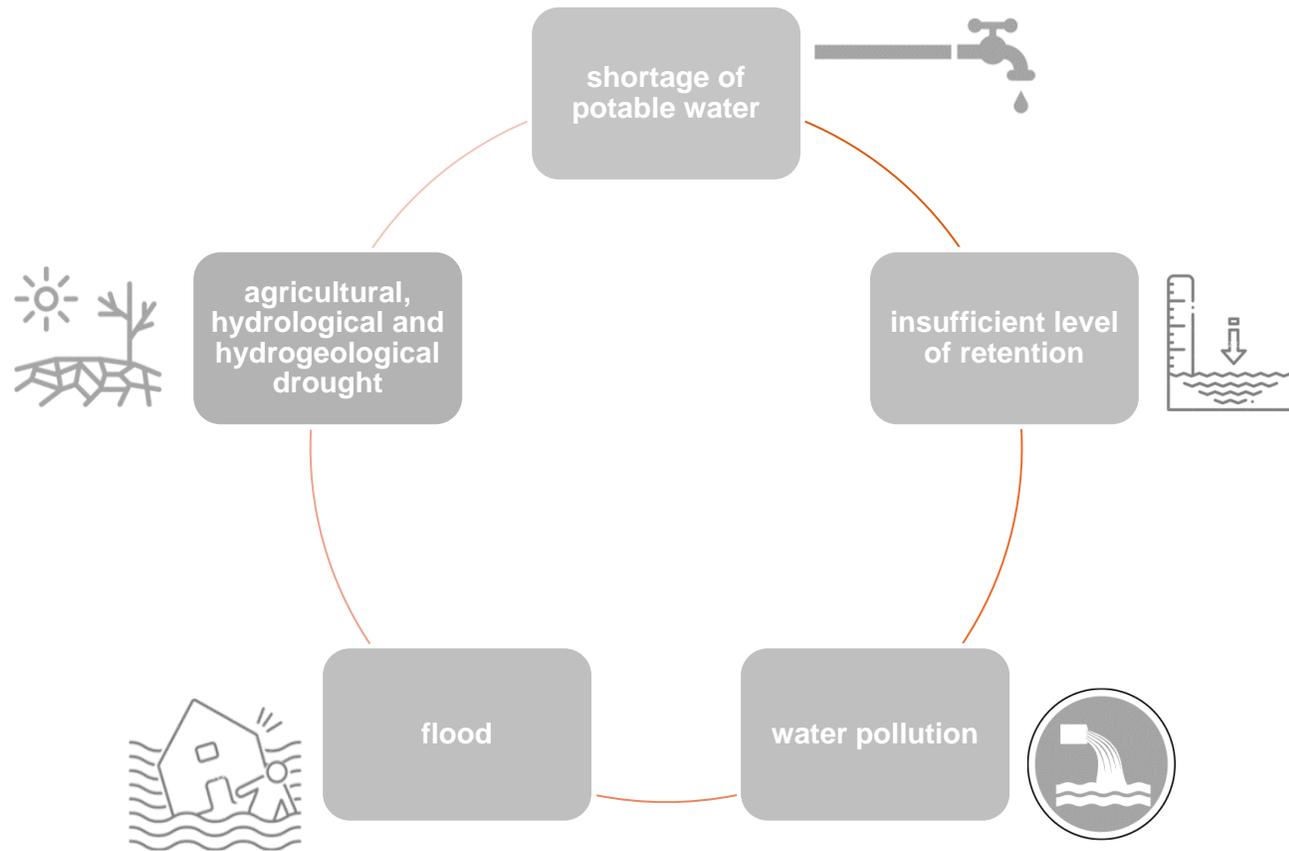


**Figure 3** A map of the total risk of agricultural, hydrological and hydrogeological drought  
Source: 'Stop Drought! 2020 - Report on the period from the worst drought for the last 50 years to the increase in retention'.

## SOLUTIONS



# KEY PROBLEMS IN THE WATER MANAGEMENT SECTOR



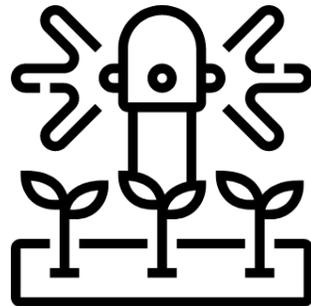
**Niche areas**



# 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.

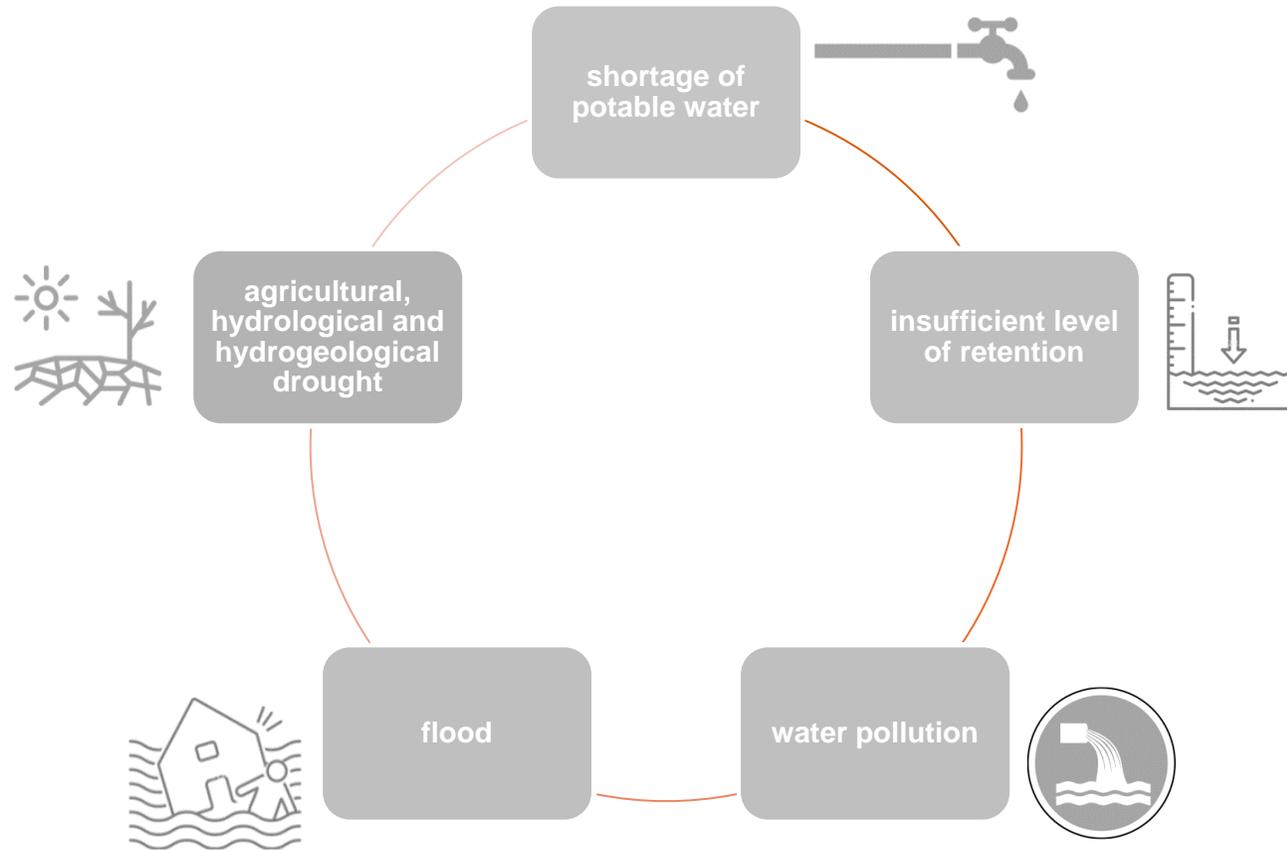


### CIRCULAR ECONOMY



- 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

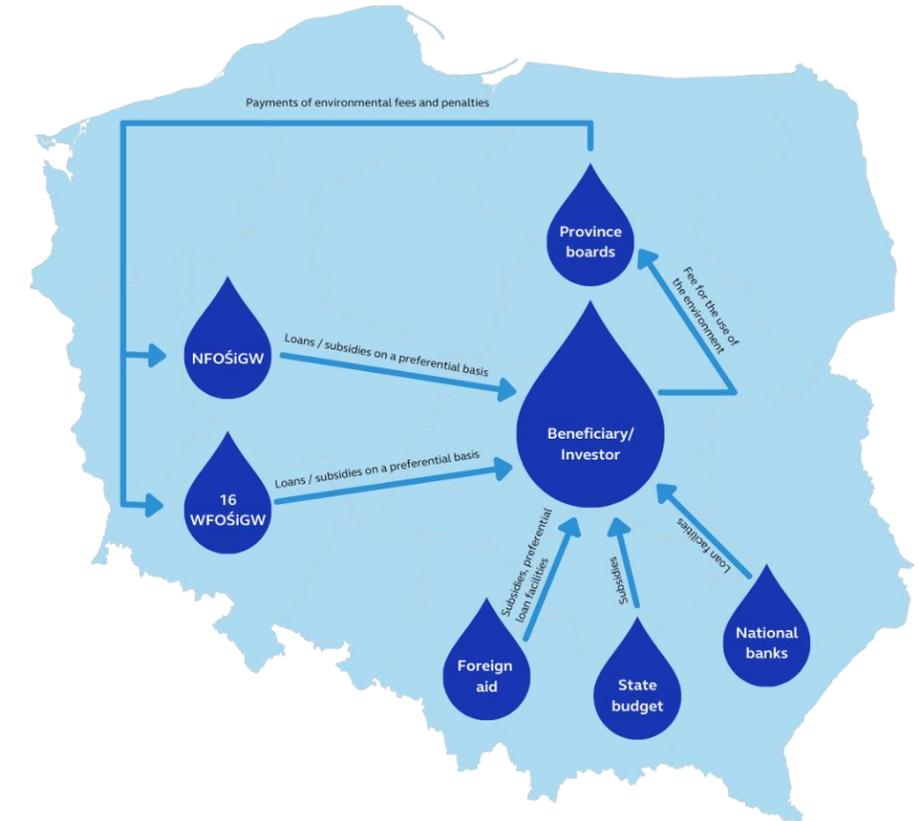


**Shortage of funds**



# FINANCING SOURCES OF INVESTMENTS IN WATER MANAGEMENT

- |  |   |
|--|---|
| <input type="checkbox"/> FOREIGN FUNDS   | <input type="checkbox"/> NATIONAL FUNDS   |
| <input type="checkbox"/> The World Bank  | <input type="checkbox"/> State Budget   |
| <input type="checkbox"/> The Council of Europe Development Bank  | <input type="checkbox"/> Budget of Local Government Units   |
| <input type="checkbox"/> the European Investment Bank;   | <input type="checkbox"/> National banks (e.g. Bank Ochrony Środowiska; Bank Polskiej Spółdzielczości SA; SGB-Bank SA; Bank Zachodni WBK SA) |
| <input type="checkbox"/> the EU funds: (the European Regional; Development Fund Cohesion Fund; LIFE Programme) | <input type="checkbox"/> Environment protection funds - (NFOŚiGW) and (WFOŚiGW)   |



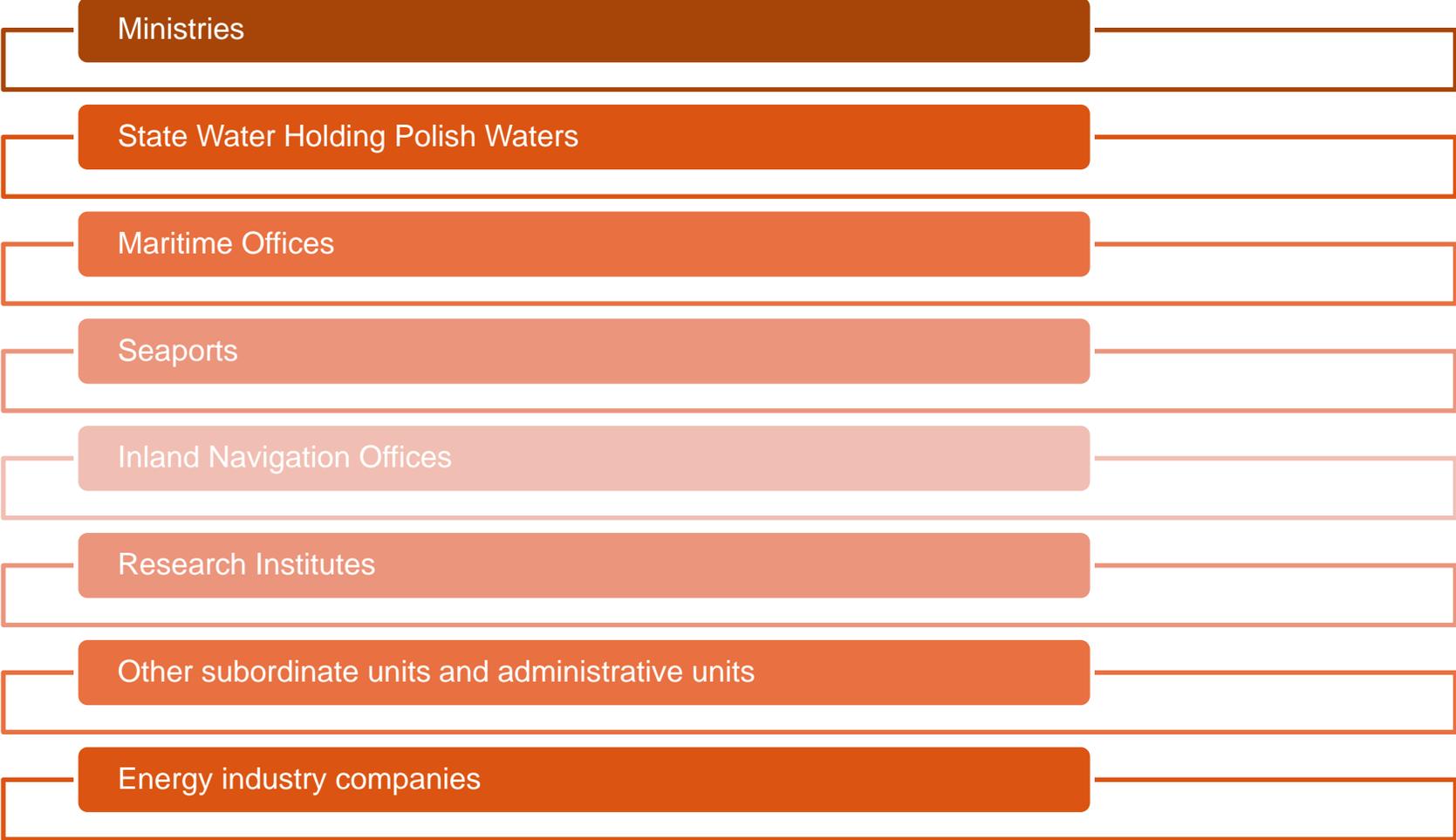
**Figure 5** A general diagram of the system and main sources of financing of water management in Poland

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

An aerial photograph of a large, calm reservoir or lake, likely a dammed river. The water is a deep blue-green color. The surrounding landscape is lush green with rolling hills and a small town or village with red-roofed houses and green fields. The sky is overcast with grey clouds. The text is overlaid in the center 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

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

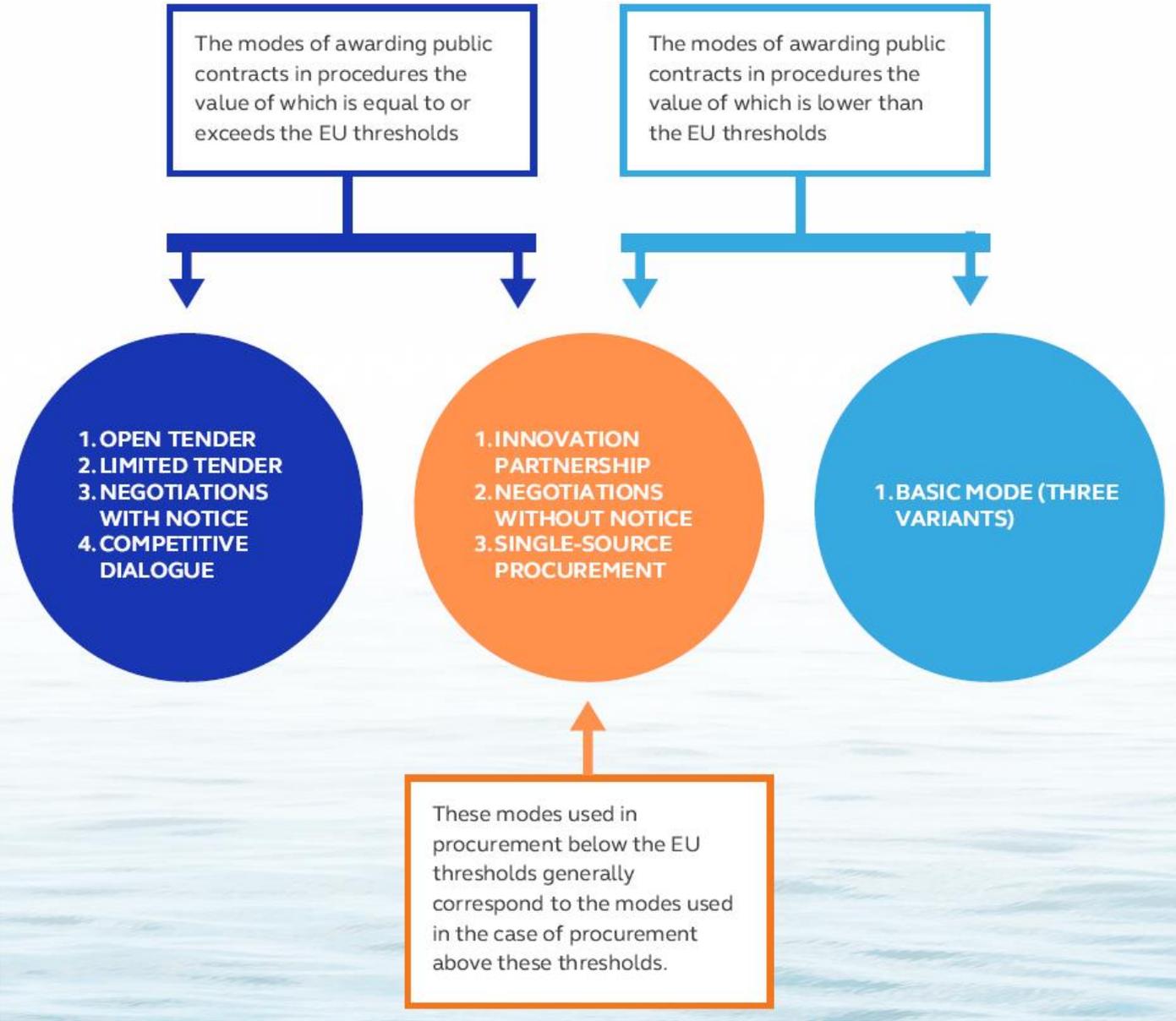
## Explanations:

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

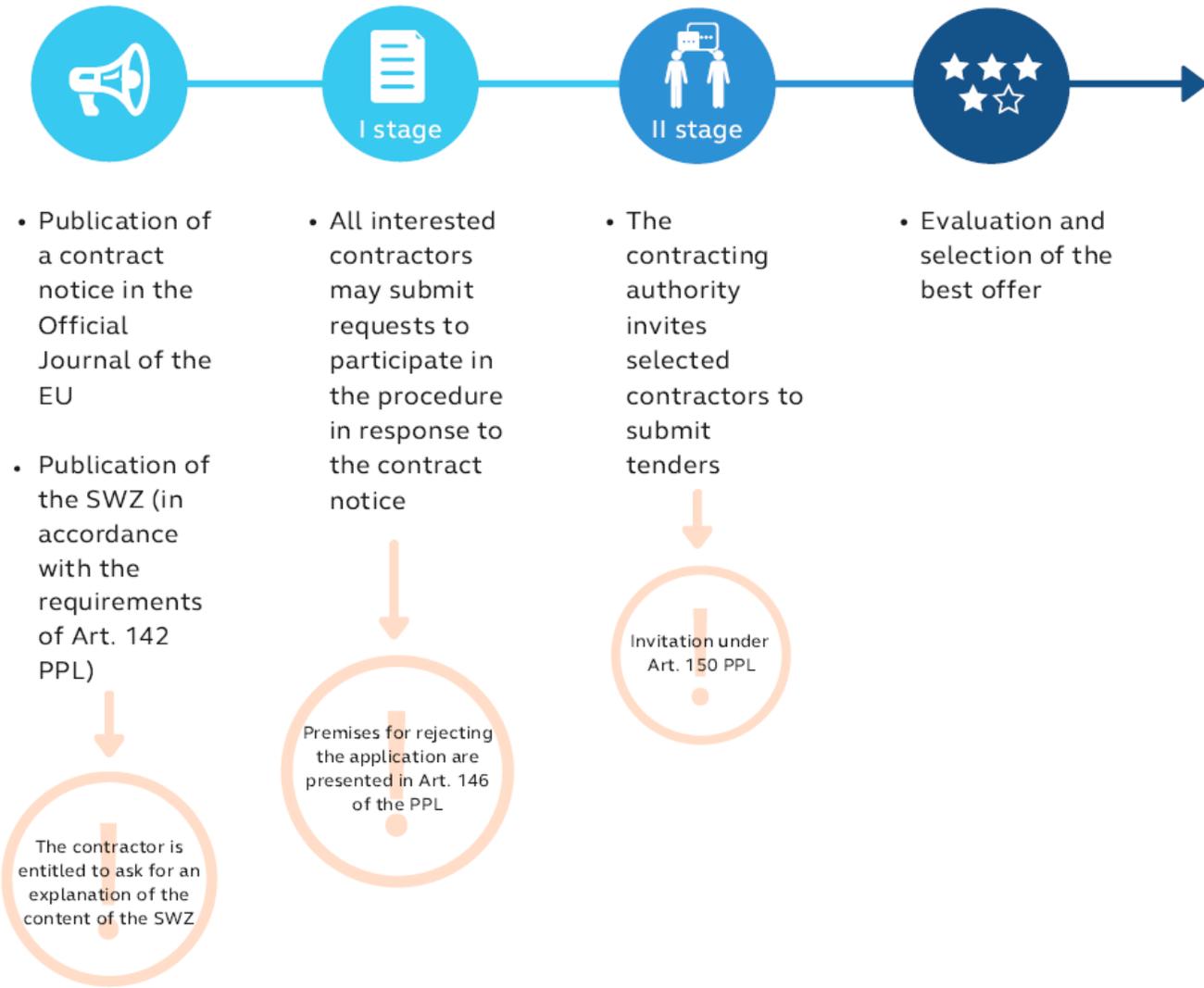
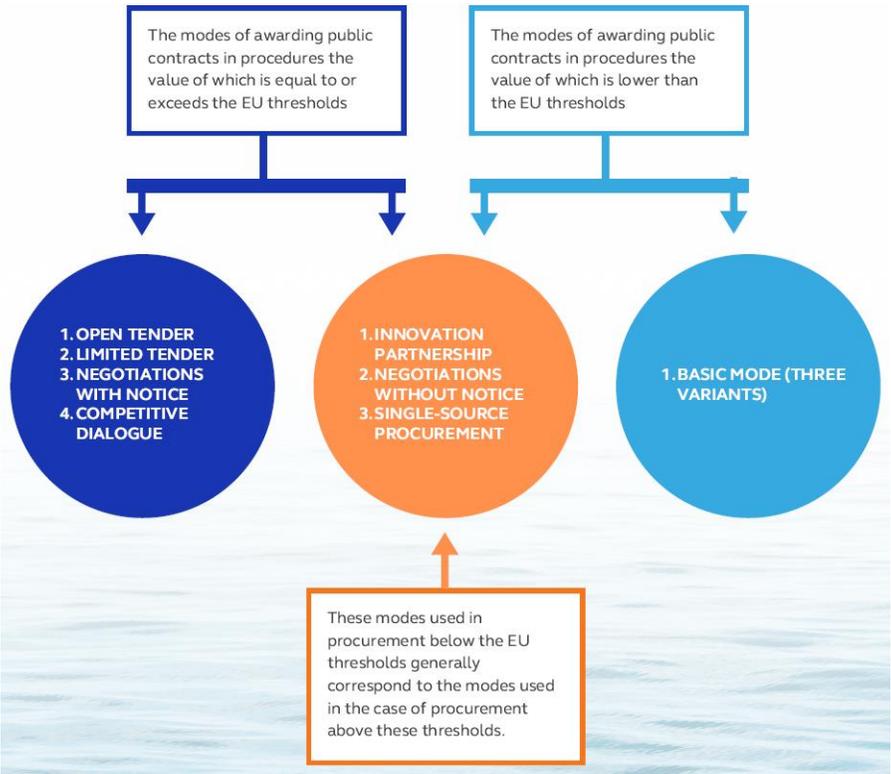
# PUBLIC PROCUREMENT LAW

- 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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 [@BarbaraParandyk](https://www.linkedin.com/company/arcadis/people/barbara-parandyk)

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