
UK
TRADE &
INVESTMENT

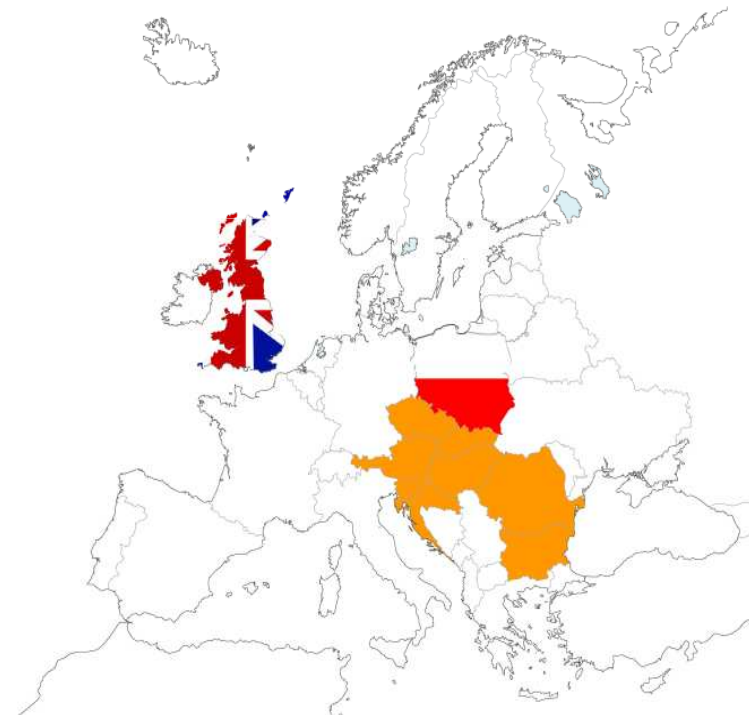


Poland's Water Sector Outlook & Opportunities



Poland

- 6th largest economy and population in Europe
- GDP in 2011- **PLN 1522.7 bn**
(**GBP 298.6 bn**)
- GDP Growth: **2.7 %(2012)**
- A two hour away flight from UK
- 67bn of EU funding between 2007 and 2013 driving progress
- Politically and economically stable

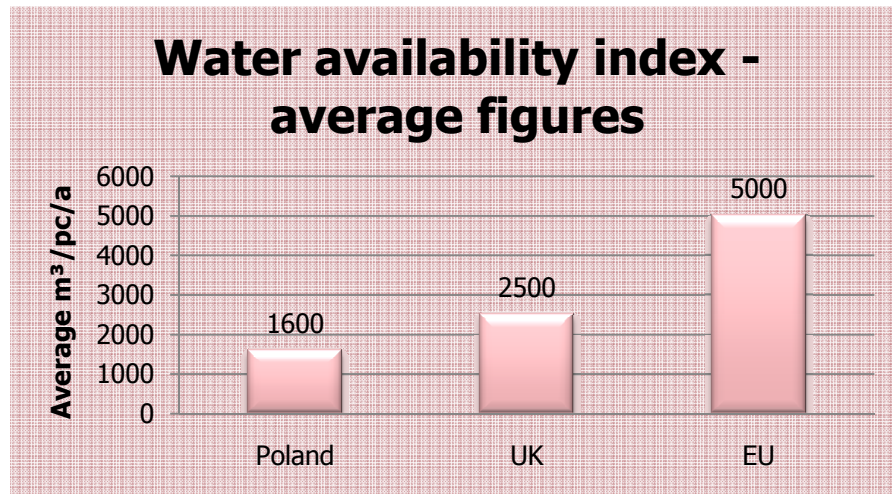


UK- Poland trade in 2011

- UK is Poland's **2nd** largest export market; UK is Poland's **8th** largest import source
- UK is now Poland's **7th**-largest bilateral trade partner
- Poland is **17th** most important export market for the UK
- Polish exports up by **17%**, UK exports up by **14%**
- Trade gap widened slightly from **£2.25bn** to **£2.77bn**

A few words on water in Poland

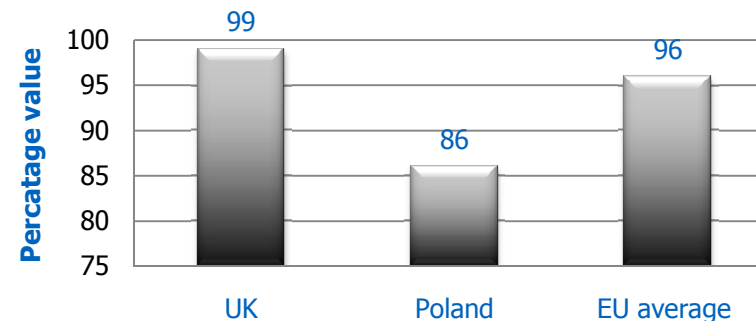
- Annual water income: 92 billion m³
- Water availability index (m³/per capita/per annum) : 1600– Poland is placed 22nd among 27 countries.
- UK and EU water availability index are: 2500 m³/pc/a and 5000 m³/pc/a, respectively.



A few words on water in Poland

- Water network: 273 000 km (over 6000 km built in 2010)
- Access to water systems: almost 100 % of urban and only 55 % of rural inhabitants have access to water systems, country average 86 %
- In comparison UK's average is 99% and EU's 96%.

Population percentage with access to drinking water services

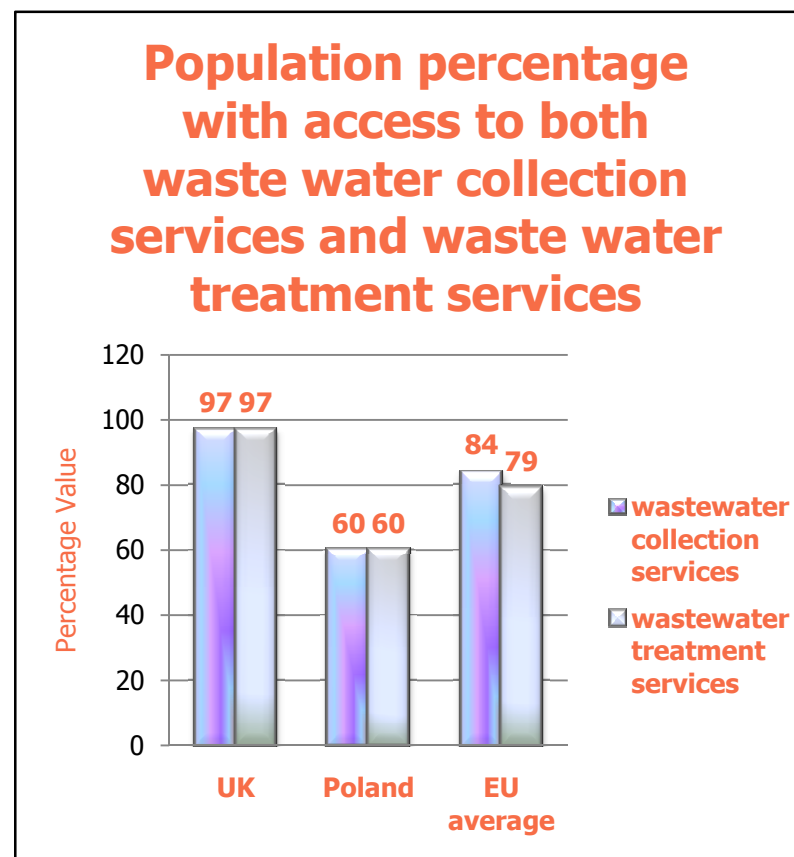


“Current water and waste water systems are of poor quality. Subsidies offered to public and private customers will boost investments.” Jan Rączka, President of National Fund for Environment Protection and Water Management (NFOSiGW), 18.05.2011



A few words on water in Poland

- Wastewater network: 108 000 km (7000 km built in 2010)
- Access to waste water collection and treatment services: 60 % of urban and rural population (country average)
- In comparison UK's average is 97% for both services, whereas EU's average is 84% (waste water collection) and 79 % waste water treatment).



Value of Investments

- Last year the turnover of investments was **PLN 2.2 billion (£416 million)**, which resulted in increasing the number of sewage treatment plants by 109 plants and its wastewater system by 8 900 km.
- It has been estimated that future investments in the water sector are worth **PLN 73.8 bn (£14.5bn)**. This sum will be divided for the following projects: building water systems, construction of sewage systems and building sewage treatment plants.
- About **1500 towns and gminas** (counties) will invest in new sewage systems and waste water plants by 2015.
- Investment allocated to flood alert programme: **PLN 516 m (£ 101 m)** allocated to counteract and dispose of the effects of natural disasters (i.e. floods).
- **Significant investments at both national and local level in all aspects of Poland's water sector make it one of the largest opportunities for UK companies internationally.**

Some forthcoming investments – in brief

- Some investments that will be carried out in **hydroelectric power sector**:
 - ✓ The Group of Hydropower Plants in Nidzica (ZEW) is planning on **heavily investing** in **small hydropower plants** up to 2015. They are intending to build several new plants in southern and south-eastern Poland.
 - ✓ Building of **five hydropower plants** on the Narew river, to help meet the needs of 200-600 households. Each worth around **PLN 60 million (£ 11.8 million)**
 - ✓ Polish Energy Group- Renewable Energy (PGE EO) **has announced a tender** for the construction of a hydropower plant in Lubuskie Voivodeship.

UKTI Poland regularly publish details of new tenders in the water sector on the UKTI website

Some forthcoming investments

- The State Council for Water Management (KRGW) is planning **to announce a tender** for updating the plans and designs of basin water management in Poland.
- The government is attempting to create floodplains that would save the more valuable land and properties from being flooded.
- **INWAPO** is a project dedicated to the modernisation and upgrading of inland water routes in Central Europe. The budget (including EU funds) is PLN **15.6 million (£ 3.1 million)**.
- **UKTI Poland regularly publish details of new tenders in the water sector on the UKTI website**

Opportunities for British companies

- Contractors, consultant engineers, manufacturers, suppliers of specialist machinery, equipment and materials, design engineers and constructors of hydropower plants.
- Poland does not manufacture specialist water sector equipment and there is strong demand for high quality products in this area.
- supplying sewage treatment plants;
- monitoring and measuring equipment and sludge treatment equipment;
- pipes, fittings and wells, hydraulic units, pumps and plumbing fittings;
- machines and appliances for building, repairing and maintenance of water supply and sewage network;

Success story- WS Atkins

- Atkins has worked with the Institute of Meteorology and Water Management (IMiGW) in materialising the Nation-wide Monitoring System of Country Protection (SMOK).
- The company provided technical assistance and investment management throughout the project .
- The project lasted between 2003 and 2006.



How does UKTI Poland support UK plc?

- UKTI Poland is split into two teams: Strategic Trade Team (STT) & High Potential Small to Medium Enterprises (HPSME).
- STT help large and multinational UK companies to enter and expand on the Polish market. They also ensure fair and open representation of UK business interests with government and local authorities.
- HPSME team provide a support package including advice and information on market, events, contacts, detailed reports on relevant sectors and eventual risks for small and medium companies.
- UKTI Poland takes commercial expertise, the British Government's reputation and branding and powerful Embassy network to create an extensive package of business support for UK companies.

UKTI Poland

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