



Portuguese Water  
Partnership



# Portuguese Water Partnership

*Promoting the internationalisation of the  
Portuguese water cluster*

*“Portugal as a platform to Brazil”*  
3rd Low Carbon Technologies Exhibition  
Lisbon, British Embassy, 12<sup>th</sup> March, 2013

*João Simão Pires  
Executive Director*



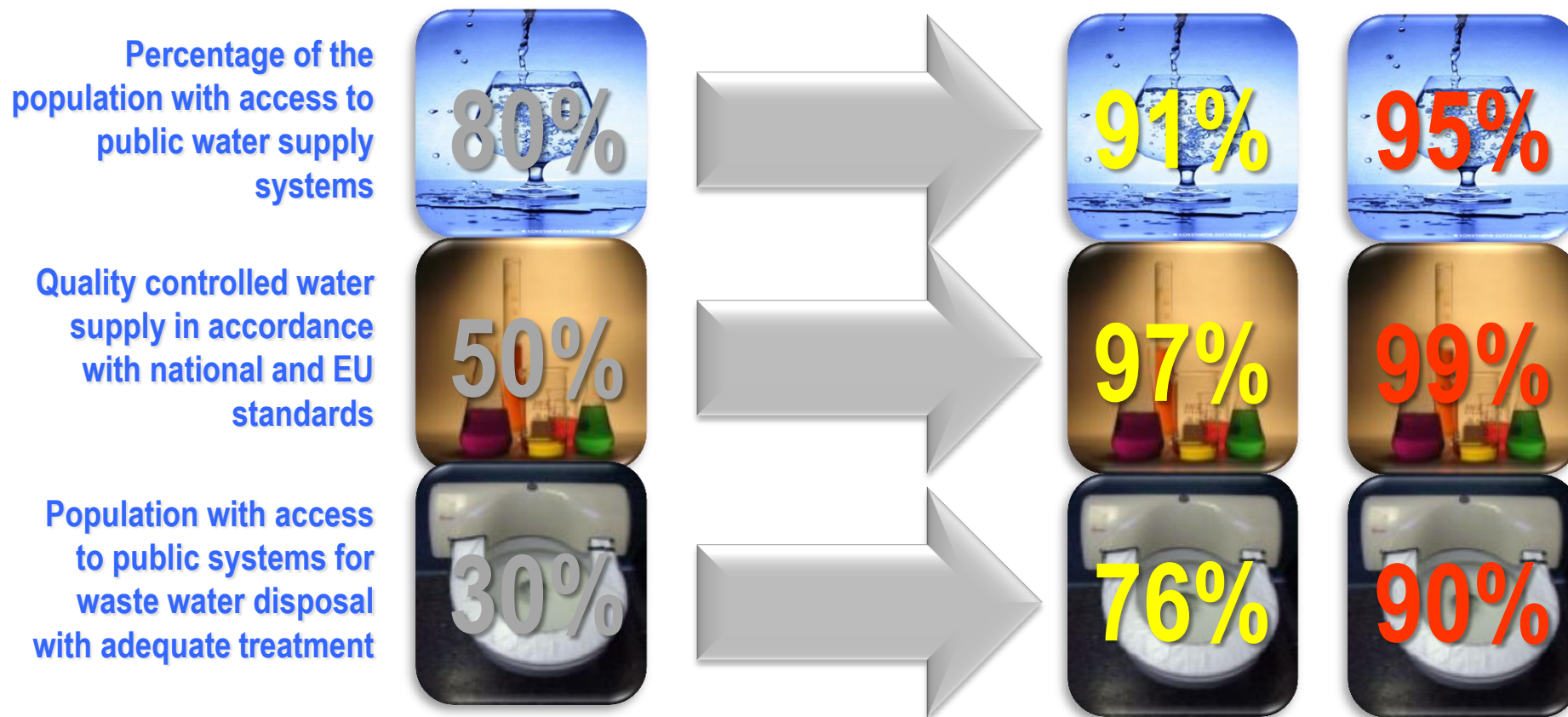
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Over the last 20 years there has  
been remarkable progress in the  
water sector in Portugal ...

UK  
TRADE &  
INVESTMENT



*Evolution of the water sector in 1993-2008 and current targets:*





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... resulting in the development of  
significant expertise and valuable  
competencies in:

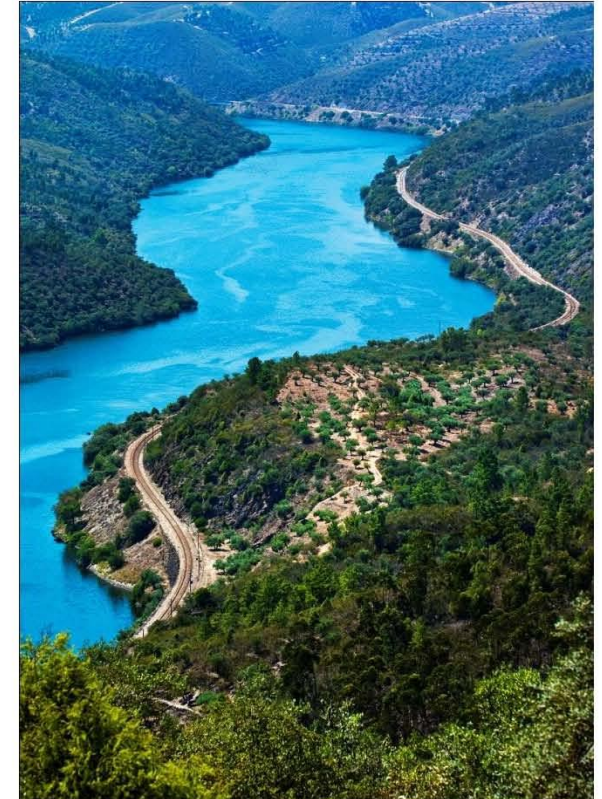
**Water Resources**

**Water Services**

**Hydraulic Developments**

**Coastal Management**

**Governance and Water  
Institutions**







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# The Portuguese Water Partnership



**A Portuguese contribution for a  
global and sustainable water  
development**

# A diversified and growing membership base...





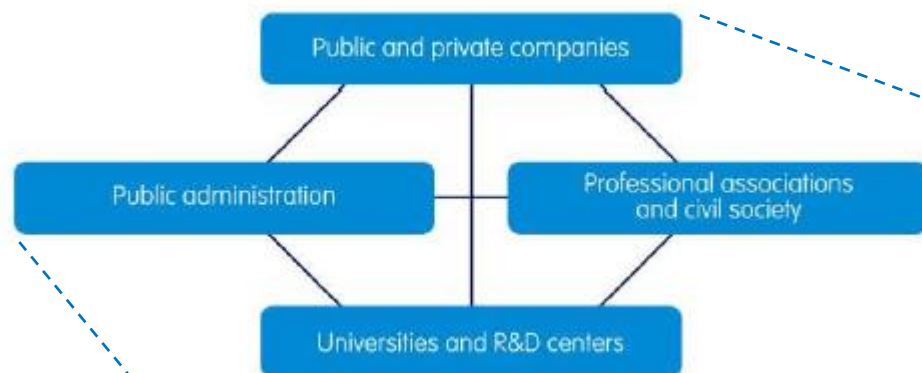
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## ... structured around four key pillars...

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### The Partners



The Portuguese Water Partnership, as a network platform, brings together:

#### **Public and private companies**

Design and consultancy companies, construction contractors, equipment suppliers, management and operation companies.

#### **Universities and R&D centers**

Universities, research centres, state laboratories.

#### **Public administration**

National Water Institute, River Basin Administrations, Water Services Regulator, Portuguese Institute for Cooperation, Portuguese Agency for Investment and Trade.

#### **Professional associations and civil society**

Professional and technical associations, non-governmental development associations, water users associations, sectoral economic associations.





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# ... and covering several layers of the cluster's value chain.

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PLANNING AND MANAGEMENT  
OF WATER RESOURCES

WATER SERVICES

HYDRAULIC  
DEVELOPMENTS

COASTAL  
MANAGEMENT

GOVERNANCE

Water supply  
systems

Wastewater  
systems

Dams and river  
regulation work

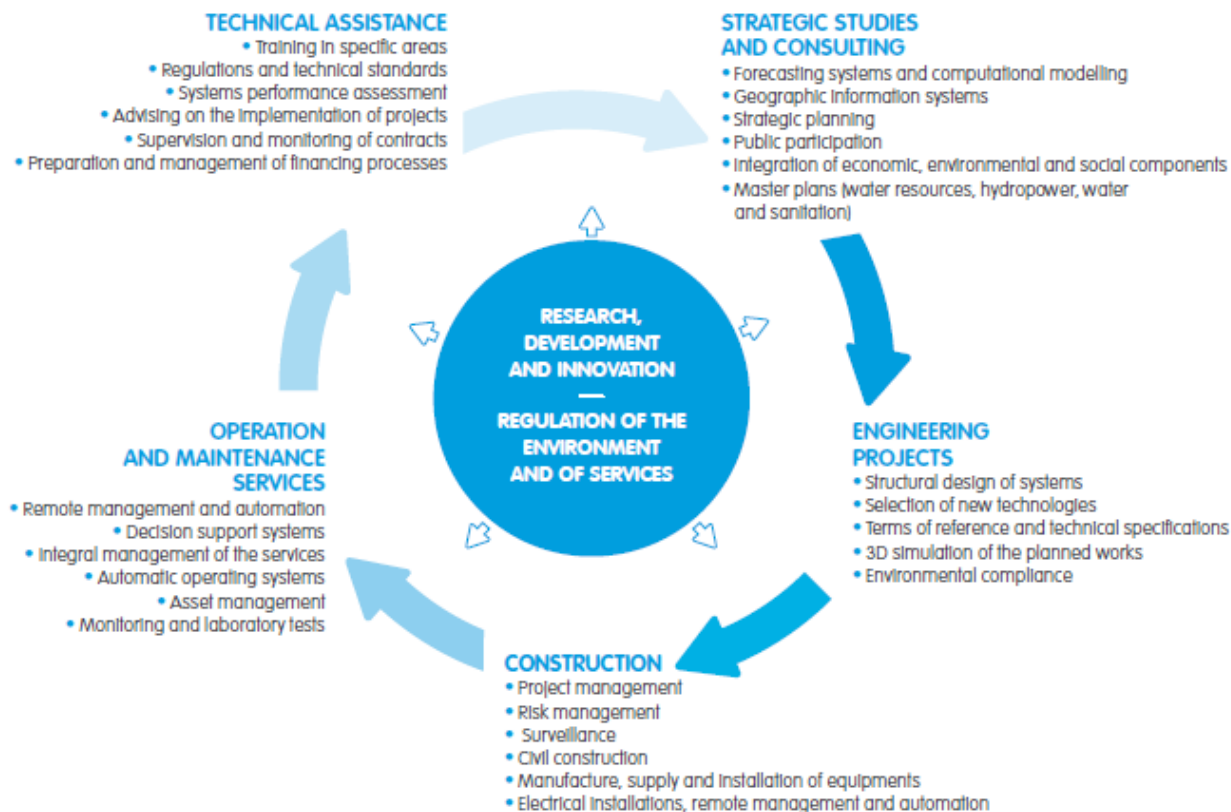
Pollution control  
and ecosystem  
valorisation

Hydropower plants

Irrigation schemes

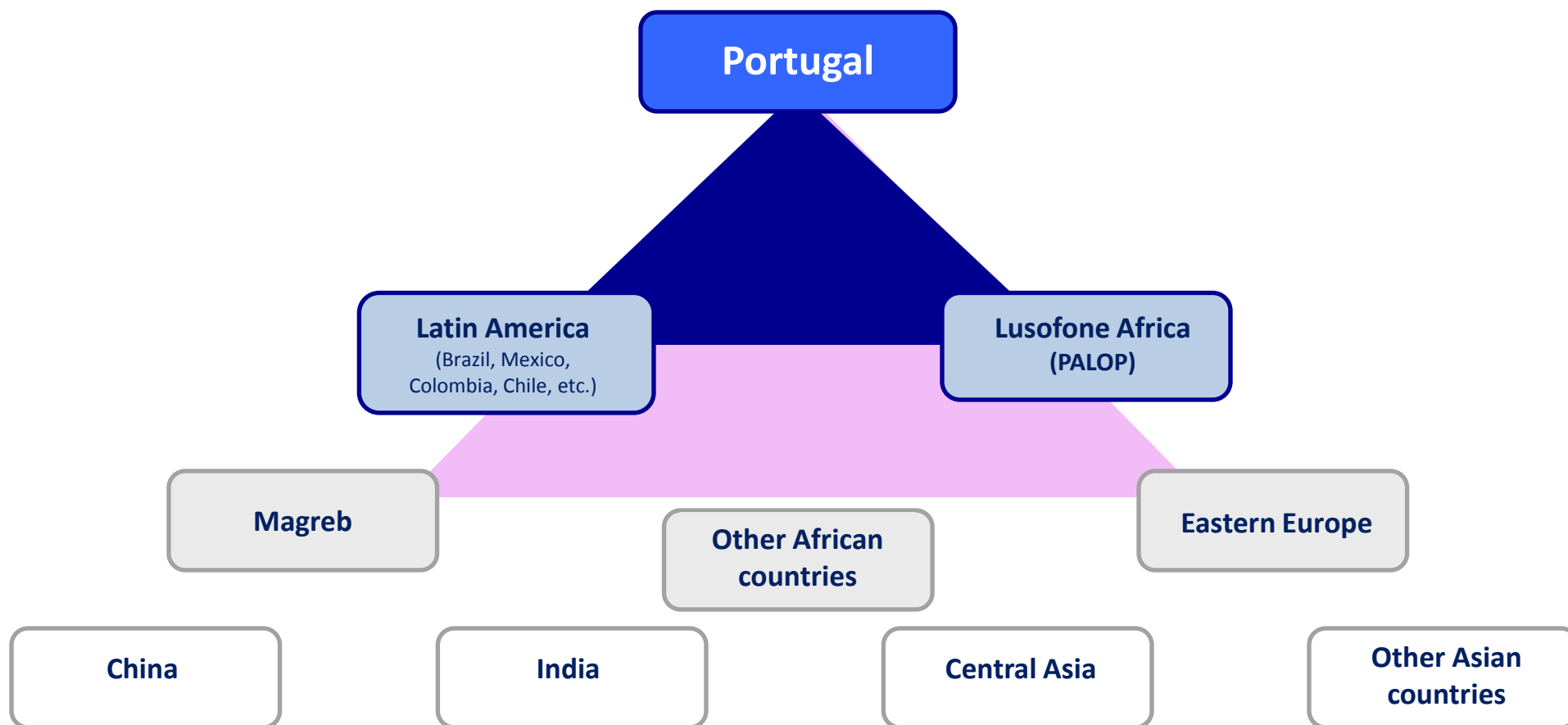
Coastal protection and  
requalification works

Maritime and  
port works



# Brazil is naturally a key target market for the Partnership...

**PWP's areas of geographic focus**  
***"Virtuous triangle" and "emerging opportunities"***







*PWP members with sustained presence in the  
Brazilian water sector*

- Aquasis - [www.aquasis.pt](http://www.aquasis.pt)
- Casais - [www.casais.pt](http://www.casais.pt)
- Cenor - [www.cenor.pt](http://www.cenor.pt)
- Cinclus - [www.cinclus.pt](http://www.cinclus.pt)
- Coba - [www.coba.pt](http://www.coba.pt)
- Consulgal - [www.consulgal.pt](http://www.consulgal.pt)
- Efacec - [www.efacec.com](http://www.efacec.com)
- F9Consulting - [www.f9consulting.com](http://www.f9consulting.com)
- Gibb Portugal - [www.gibbportugal.com](http://www.gibbportugal.com)
- ISA Intelligent Sensing - [www.isasensing.com](http://www.isasensing.com)
- M de Maquina - [www.navia.pt](http://www.navia.pt)
- MonteAdriano - [www.grupomonteadriano.com](http://www.grupomonteadriano.com)
- Procesi - [www.procesi.pt](http://www.procesi.pt)

Source: [www.ppa.pt](http://www.ppa.pt)

... building on the presence and  
experience of several firms which  
already have a sustained involvement in  
the Brazilian market.

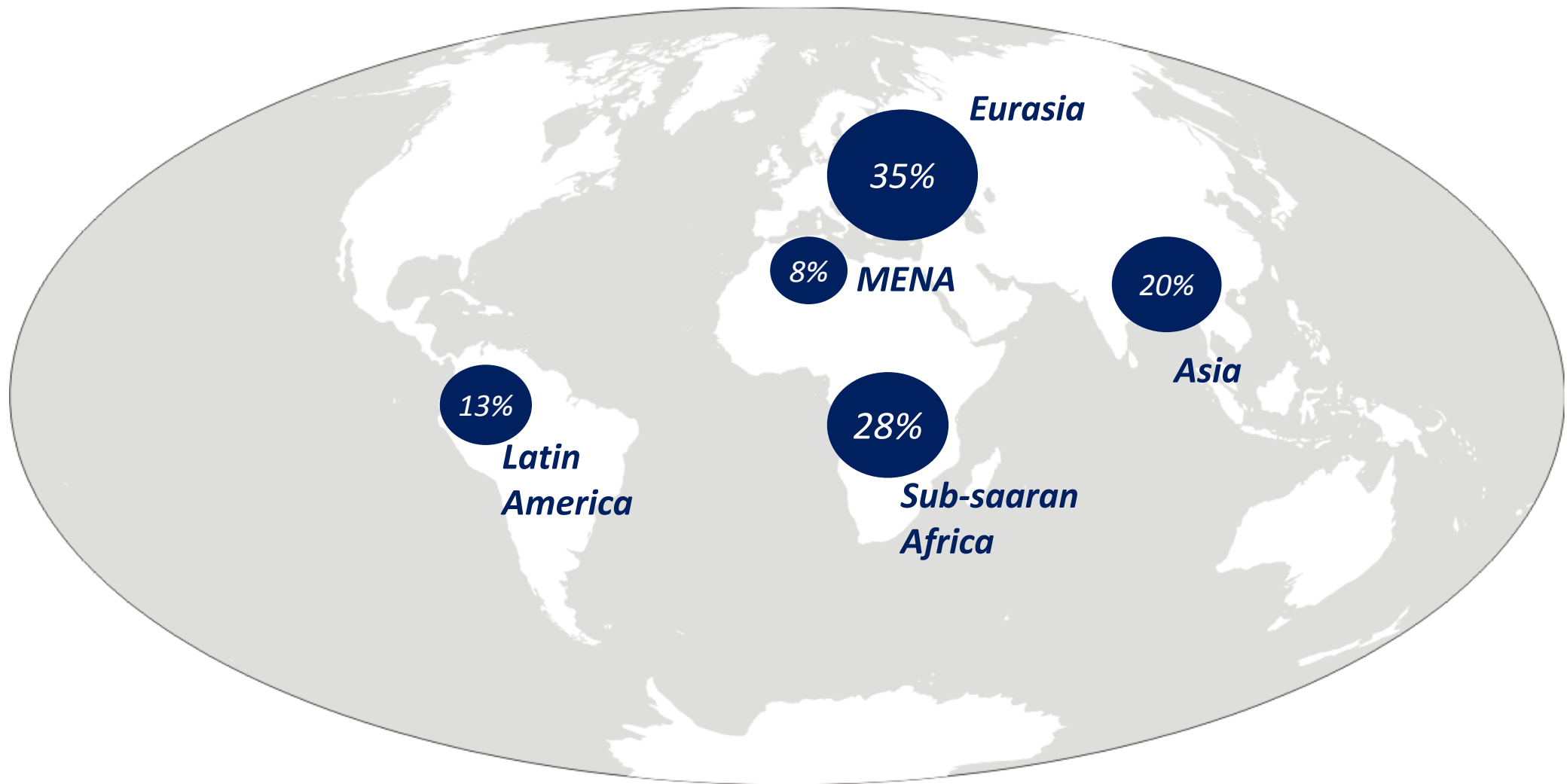




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**Contrary to other emerging  
markets, international tenders play  
a less relevant role as an entry  
vehicle into the Brazilian market...**

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31%



20%



16%



**European Bank**  
for Reconstruction and Development

12%



ASIAN DEVELOPMENT BANK

8%



Inter-American Development Bank

5%



4%



2%



1%



1%





## Yet, despite a common language, the Brazilian water sector is not a “piece of cake” for Portuguese firms...



### ***Barriers to entry***

- *Federal allocation of decision rights – each state is a “market” in its own right*
- *Large construction firms with relevant know how international ambitions*
- *Concentrated government owned utilities (e.g SABESP is the world’s third largest utility) – protective procurement policies*

*Non-tariff barriers (local content requirements, non-mutual recognition in the engineering profession, ...)*

### ***Potential sweet spots***

- *Shortage of qualified professionals facing imminent “world stage events”*
- *Despite preference for labour intensive solutions, openness to cutting-edge system management skills and smart-technologies*
- *Open to alternatives to “American influence”*
- *Improved access to the European Union and sub-Saharan Africa*

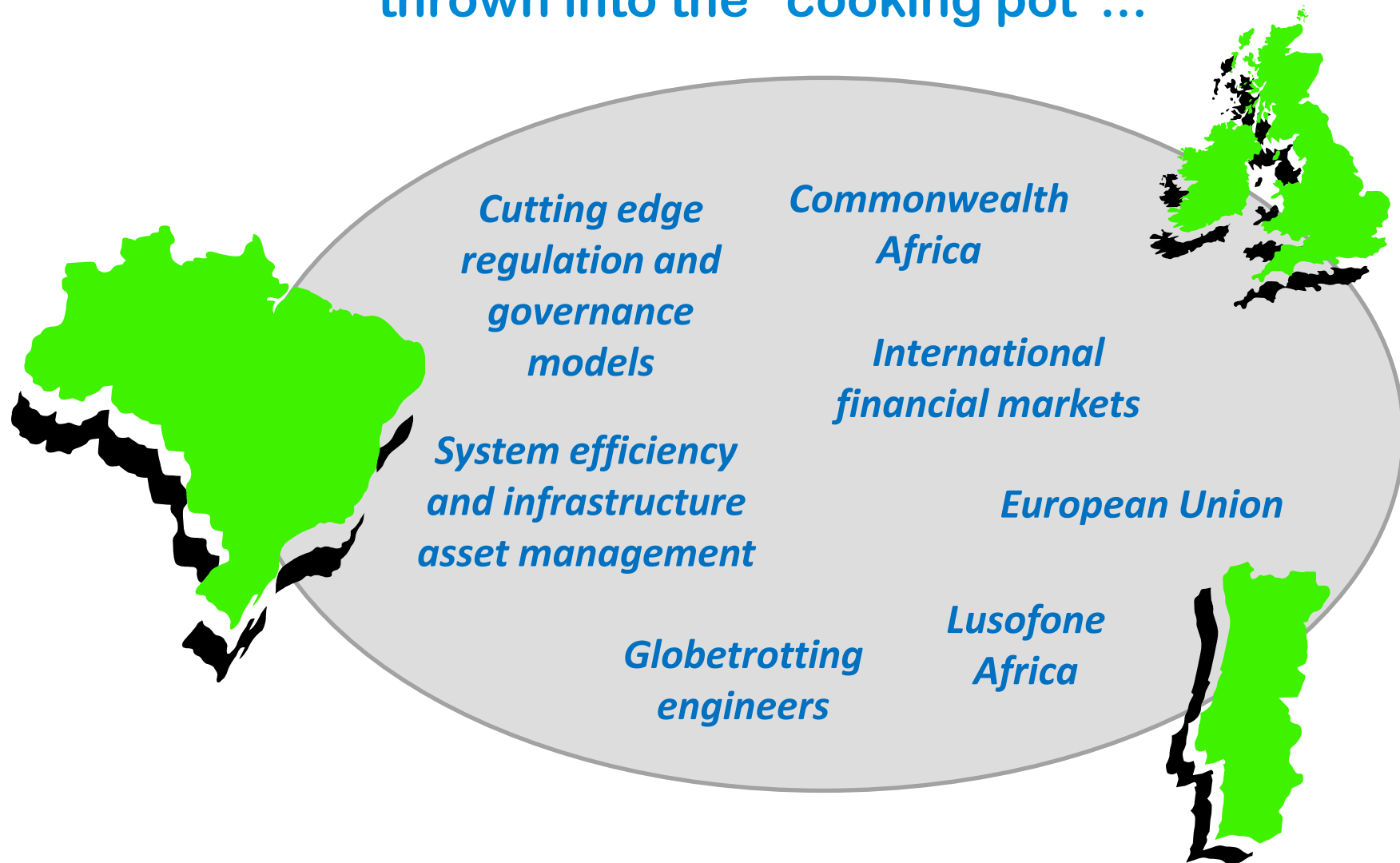


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## Perspective on what can be thrown into the “cooking pot”...



***Whatever we possess becomes of double  
value when we have the opportunity of  
sharing it with others !***

***JEAN-NICOLAS BOUILLY (1763-1842)***





The background features a series of overlapping, wavy, organic shapes in various shades of blue (dark navy, medium blue, and light sky blue) and white. These shapes create a sense of movement and depth, resembling stylized waves or flowing water. The overall composition is clean and modern.

**Parceria Portuguesa para a Água**

***Thank you!***