

The French water companies, experts in water management worldwide

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DE L'EAU

Next page

Contents

- The French water companies, experts in water service management worldwide 3
- The organization of the public water and sanitation services 4
- Large involvement of water companies in french water public services management 5
- French consumers largely satisfied with public water services 6
- Low average daily expense related to water 7
- Contained average water price in France 8
- Internationally recognized local presence 9
- Major technical breakthroughs resulting from R&D 10



Back to homepage

The French water companies, experts in water services management worldwide

Presentation of the french Federation of Water Companies (FP2E)

The FP2E is an association set up to represent the french water companies managing public water and sanitation services in France and wordldwide, that have been selected in the framework of public tendering processes.

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NANTAISE DES EAUX SERVICES
Membre du Groupe GELSENWASSER

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The FP2E acts as a mouthpiece for its members to the different public authorities stakeholders of the water industry in France and Europe, especially on topics related to general interest such as: water quality, preservation of water resources, public water and sanitation services governance, legal and regulatory framework of the water industry, social aspects, consumers expectations…

Representing its members within european and international assemblies as EUREAU (european union of the drinking water and waste water service operators), IWA (International Water Association) and AQUAFED (international association of private water and sanitation services operators) is also one of its main missions.

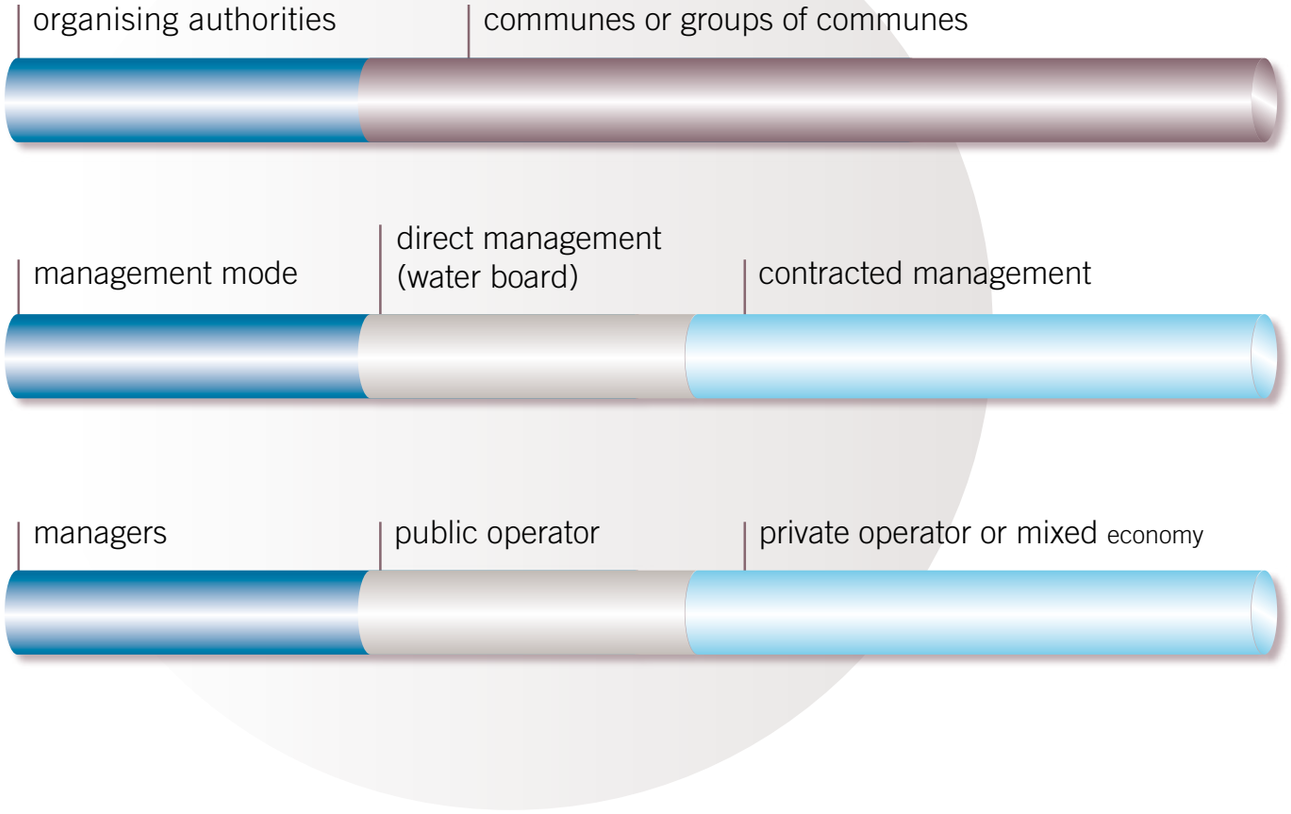
Previous page

Next page



Back to homepage

The organization of the French public water and sanitation services



The french water and sanitation services are public services of an industrial or commercial nature.

Most of them ar managed through following organisation:

→ **A local authority is responsible** for the service coordination : decides and controls the service (local municipality or groups of municipalities)

→ **An operator manages the service**
The operator can be public or private in accordance with the opposite diagram.

Private operators deliver water supply or sanitation services under the direction and control of the public authority.

Previous page

Next page



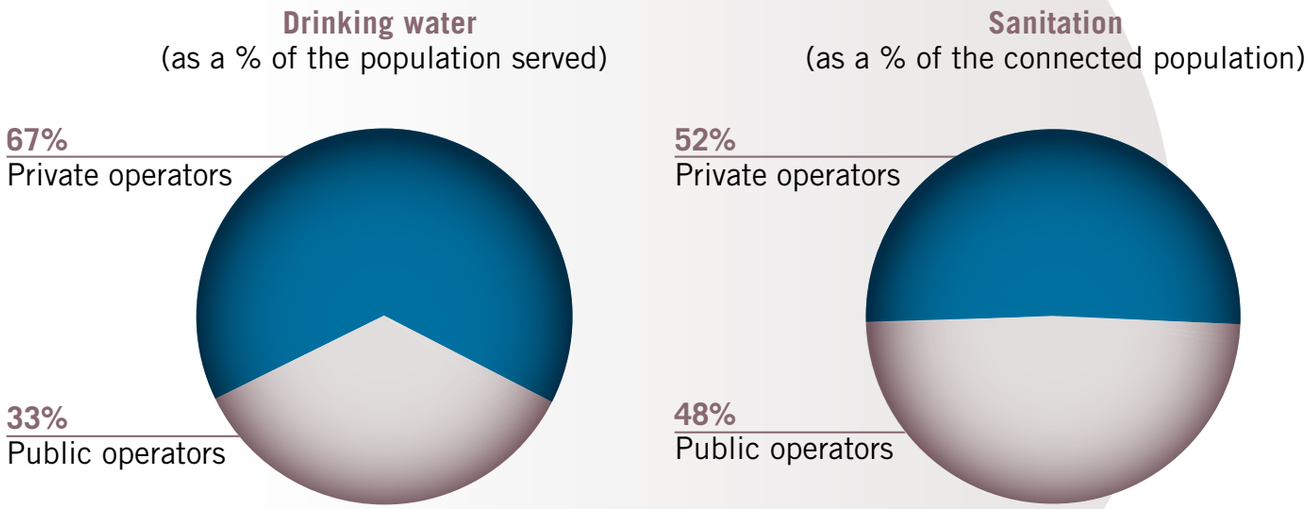
Back to homepage

Large involvement of water companies in french water public services management

In terms of population, the water companies manage two thirds of drinking water services and just over half of the sanitation services

BREAKDOWN OF WATER AND SANITATION SERVICES IN 2010

Sources: FP2E -BIPE according to operator 2011 surveys; INSEE



FP2E's members operate more than 95% of the French public water and sanitation services managed in a public service concession contract, i.e. more than 10.000 service operation contracts.

They also provide services to industrial water-users.

In France, water companies roughly provide :

- **45 million of inhabitants with drinking water**
- **30 million of inhabitants with sanitation services**

Previous page

Next page



Back to homepage

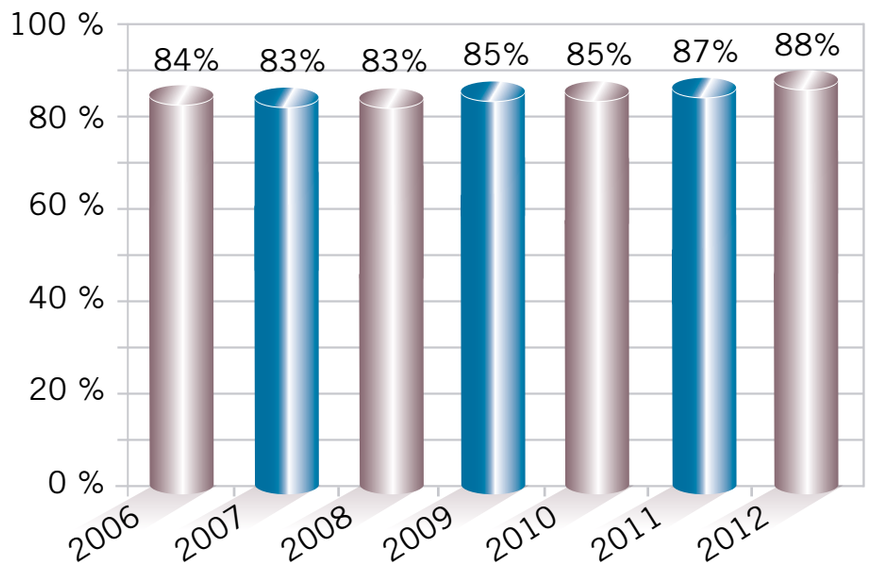
French consumers largely satisfied with public water services

Several users studies have shown that the water supply and sanitation services are among the most popular public services.

Year after year, the opinion of French users satisfaction rate increase : in 2012, **88% of French users state that they are satisfied with water public services** in their city.

PUBLIC WATER SERVICE SATISFACTION LEVELS (2008-2012)

Sources: barometer « French people and Water » 2012, TNS Sofres/French Information Center



Previous page

Next page



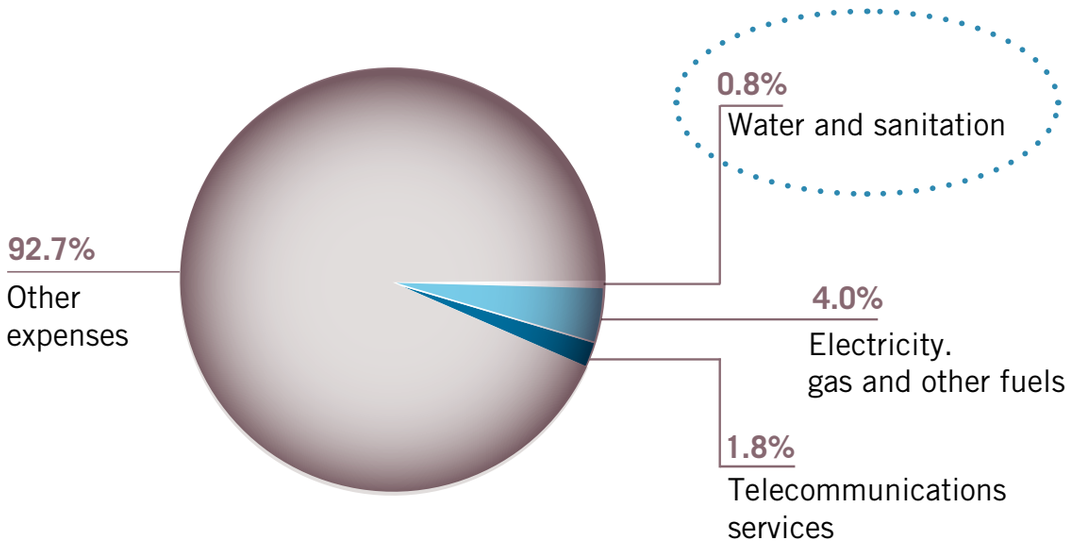
Back to homepage

Low average daily expense related to water

The proportion of French household budget expenses related to water has been static since 1996 : 0,8%.

PROPORTION OF HOUSEHOLD BUDGET EXPENSES RELATED TO WATER IN 2010

Source: BIPE according to INSEE 2010



1€ per day per family
is the average daily expense related to water

Source:
National Institute of Statistics and Information about the Economy (INSEE) / BIPE/FP2E Study 2012

Previous page

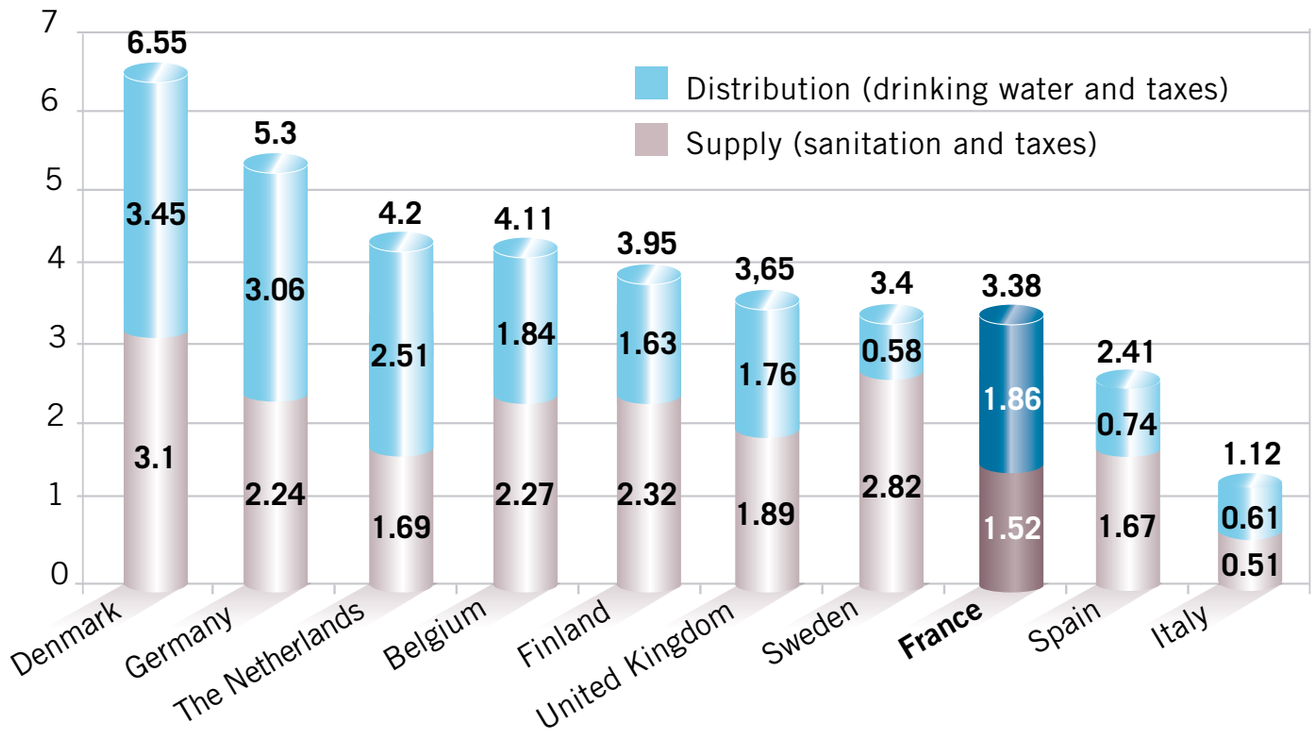
Next page

Contained average water price in France

WATER SERVICE PRICE FOR PRIVATE CUSTOMERS IN THE FIVE LARGETS CITIES IN EACH COUNTRY, BASED ON AN ANNUAL CONSUMPTION OF 120 M³

Source: NUS Consulting Study, 2011

The average price in the five largest cities in France is 3,28€ per cubic meter. It remains **8% below the average** of the five largest cities in each of the 11 countries considered in the study.





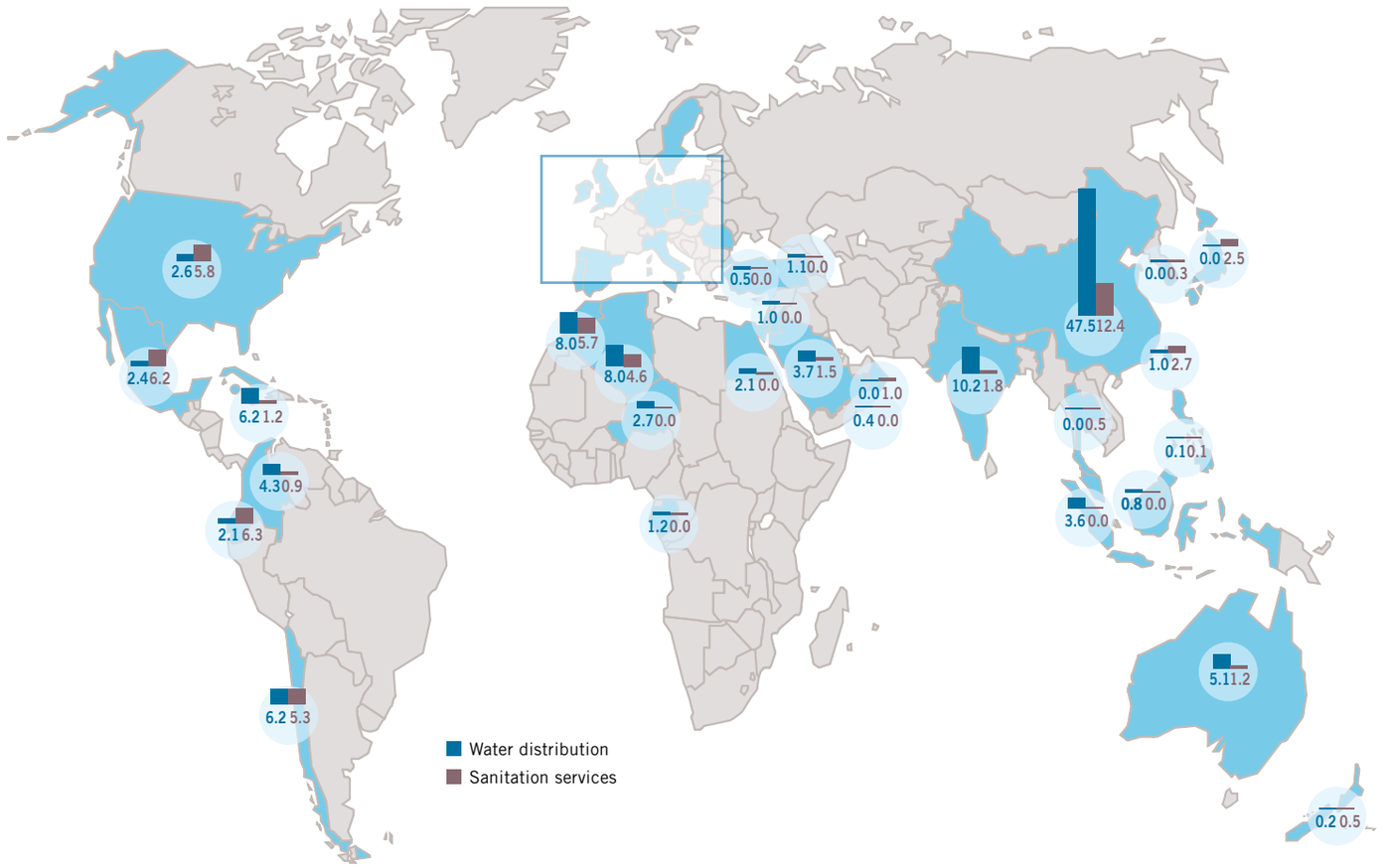
Back to homepage

Internationally recognized local presence

French water companies generate 93 000 employees overseas, wich is three times the French staff.

PRESENCE OF FRENCH OPERATORS : POPULATION PROVIDED WITH SANITATION SERVICES AND DRINKING WATER

(in % of total population for each country)



In addition to their expertise in innovative technologies, French operators supply their strong expertise in drinking water and sanitation management services.

Throughout the world, they provide tailored solutions to meet the specific needs of municipal water authorities in both urban and rural settings. They provide customized services complying with their client's challenges related to scarce water resources, health issues and stringent environmental regulations.

Staff abroad: 93.000 jobs

Drinking water: 163 million inhabitants provided

Sanitation services: 112 million inhabitants connected

Source: BIPE/FP2E Study 2012

Previous page

Next page



Back to homepage

Major technical breakthroughs resulting from R&D



French water companies invest **120 million Euros annually in R&D.**

Involving **nearly by 1000 employees in R&D** activities, the water companies are roughly active in 200 R&D themes in partnership with public research,

R&D activities sponsored by the water companies made it possible to achieve ‘technological breakthroughs’ in the water and sanitation management sector, as well as in the protection of natural environments.

More than 500 patents have been filed by them.

Exemples of technologicals breakthroughs :

- New membrane water treatment processes
- Local and renewables solutions for energy efficiency
- New analytical technologies detecting and removing micropolluants.

Previous page

Next page

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Previous page