

ECUADOR TRABAJA EN GENERAR CONFIANZA PARA APP

ECUADOR TIENE IMPORTANTES BRECHAS DE INFRAESTRUCTURA EN MATERIA DE AGUA POTABLE Y SANEAMIENTO QUE IMPLICAN OPORTUNIDADES PARA EL SECTOR. LAS AUTORIDADES RESPONSABLES LO RECONOCEN Y SABEN QUE LA CLAVE ESTÁ GENERAR LAS CONDICIONES PARA LAS ASOCIACIONES PÚBLICO PRIVADA. EL PAÍS BUSCA FINANCIAMIENTO PARA PTARs DE HASTA USD 900 MILLONES.

La Asociación Latinoamericana de Desalación y Reúso de Agua (ALADYR) estableció contacto con distintos sectores que hacen vida en Ecuador para dibujar el panorama de infraestructura y oportunidades de inversión en materia de agua potable y saneamiento.

Las imágenes más dantescas de la región latinoamericana sobre la actual pandemia provienen de Ecuador. Específicamente en Guayaquil parecen reproducirse los óleos que plasmaron para la posteridad el terror que ocasionó la peste negra del siglo XIV.

Esta lamentable situación abre el debate y pone en tela de juicio el sentido de prioridad de las autoridades gubernamentales no sólo de Ecuador sino de todo el mundo. También cabe preguntarse como sociedades “qué demandas se han hecho para preservar la salud y reforzar las barreras ante las amenazas microbiológicas que acechan a la civilización contemporánea”.

Hay quienes creen que luego de superar el temporal habrá una tendencia de inversión para adaptar a los sistemas de salud pública ante posteriores crisis sanitarias. No obstante, estas medidas reactivas son insuficientes si no se trabaja en lo preventivo como el tratamiento de aguas residuales, debido a que entrañan un riesgo de enfermedades causadas por virus, bacterias y parásitos.

Según la Secretaría Nacional del Agua Potable y Saneamiento (Senagua), ente regulador del servicio en Ecuador, el país trata 55.8% de sus residuos cloacales recolectados a través de la red de alcantarillado que canalizan aproximadamente el 70% de los efluentes generados a partir del consumo humano.

El indicador de saneamiento del Objetivo de Desarrollo Sostenible (ODS) se compone de tres elementos: las instalaciones adecuadas de eliminación de excretas, el uso exclusivo del servicio higiénico por parte del hogar y el tratamiento adecuado de aguas residuales. De acuerdo al más reciente informe de la Estrategia Nacional de Agua y Saneamiento (ENAS-2017), este último componente es un desafío para la medición independiente, ya que tal información no

ECUADOR WORKING TO GENERATE CONFIDENCE IN PPP MODEL

ECUADOR HAS SIGNIFICANT DRINKING WATER AND SANITATION INFRASTRUCTURE SHORTFALLS, WHICH MEANS THAT THERE ARE OPPORTUNITIES FOR THE SECTOR. THE COMPETENT AUTHORITIES ACKNOWLEDGE THIS FACT AND ARE AWARE THAT THE KEY IS TO CREATE FAVOURABLE CONDITIONS FOR PUBLIC-PRIVATE PARTNERSHIP (PPP). THE COUNTRY SEEKS FINANCING OF UP TO USD 900 MILLION FOR WWTPs.

The Latin American Association of Desalination and Water Reuse (ALADYR) has established contact with different sectors operating in Ecuador in order to obtain an overview of the infrastructure scenario and investment opportunities in the area of drinking water and sanitation.

The most horrific images of the current pandemic in Latin America have come from Ecuador. The waves of terror caused by the Black Death in the 14th century seem to have been reborn, particularly in Guayaquil.

This lamentable situation opens a debate and brings into question the priorities of governmental authorities, not only in Ecuador, but worldwide. Societies must also be questioned regarding the “efforts they have made to safeguard health and reinforce the barriers against the microbiological threats that endanger modern civilisation”.

There are those who believe that once the current threat has passed, there will be a tendency to invest in public health systems to prepare them for future health crises. However, such reactive measures are insufficient if preventive efforts are not made in the area of wastewater treatment, because of the risk of disease associated with viruses, bacteria and parasites in wastewater.

According to the National Water Secretariat (Senagua), which regulates drinking water and sanitation services in Ecuador, the country treats 55.8% of its wastewater through the sewerage network, which channels around 70% of effluents generated by humans.

The Sustainable Development Goal (SDG) sanitation indicator comprises three elements: adequate facilities for the disposal of excreta; non-shared or exclusive use of sanitation facilities by households, and adequate wastewater treatment. According to the latest National Water and Sanitation Strategy (ENAS-2017) report, the third element is a challenge requiring independent measurement because this information is not covered by household surveys or censuses and must be addressed using other sources of information, such as administrative registers or by requesting information from service providers.

Another of the objectives of the SDG is to eliminate open defecation. This problem affects 13% of the world population and 3% of the Latin American population. The figure for Ecuador is 1.8%, with particularly high rates in the Amazon region (14%).

The report acknowledges that the shortfall in sanitation is “significant”, in both rural and urban areas, and that there is a general lack of progress in urban sewage infrastructure coverage, with the exception of large municipalities in the Costa region.

In addition to this, small municipalities in the Costa region are still trying to recover the infrastructure

PTAR de Quitumbe inaugurada en 2017 manifiesta la voluntad de avanzar en metas nacionales de tratamiento
The Quitumbe WWTP, inaugurated in 2017, indicates the desire to progress towards meeting national treatment targets.



se recoge en las encuestas de hogares ni en los censos, y hay que abordarlo con otras fuentes de información, como registros administrativos o solicitando información a las empresas proveedoras del servicio.

Por otro lado, una de las metas ODS es el énfasis en la preocupación por eliminar la defecación al aire libre. A nivel mundial, este problema afecta al 13% de la población, en América Latina esta cifra es del 3% y en Ecuador es del 1,8% de la población, con tasas elevadas en la región amazónica (14%).

El informe reconoce que el rezago en saneamiento es “importante” tanto en el área rural como en la urbana. Manifiesta que la falta de avance en las coberturas de alcantarillado urbano es generalizada salvo en los municipios grandes de la Costa.

Adicional a esto, los municipios pequeños de la región Costa aún tratan de recuperar su infraestructura de prestación de servicios afectada durante el terremoto de abril de 2016.

“En términos absolutos la población sin acceso a servicios de agua por tubería en la vivienda o lote se concentra en las áreas rurales de los municipios medianos y pequeños de la Costa y en las urbanas de los cantones medianos de esta misma región (129.000, 95.815 y 83.722 viviendas respectivamente), representando en su conjunto el 71,5% de la población no servida” detalla el documento.

También contempla que para alcanzar las coberturas universales, el monto de inversión total sería de US\$7.331 millones. Del total de la inversión el menor porcentaje se lo lleva el tratamiento de aguas residuales con un 14% (US\$1.016 millones).

Las perspectivas

ALADYR consultó a la representante de la Cámara de Comercio Ítalo Ecuatoriana, Simona de Filippis, sobre los retos y perspectivas de crecimiento del país de la mitad del mundo.

“El Gobierno busca capital extranjero, el problema es que el aspecto legal y jurídico no brinda las condiciones de confianza. El riesgo país es muy alto” opina la gremialista, sobre lo que considera una “alta vulnerabilidad” de la inversión.

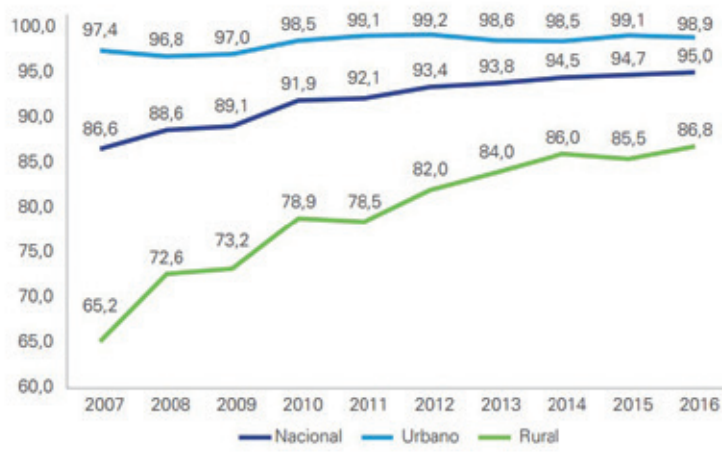
No obstante, reconoce que la actual administración busca mejorar los índices para atraer el capital que le permita avanzar en sus objetivos trazados.

En este sentido comentó que existen iniciativas positivas como el acuerdo comercial entre Italia, Ecuador, Colombia y Perú firmado en 2017. Según sus datos, este permitió un aumento de las importaciones y al mismo tiempo ha dado un empuje a las exportaciones al mercado europeo de materias primas.

También apreció que “Ecuador tiene que ser más competitivo y productivo” y que para esto debe trascender la exportación de materia prima. “Hay bastante oportunidades de inversión”.

Por su parte, Eddie Ceballos, representante de ALADYR en Ecuador, opinó que “no estaba muy clara la figura de APP” y que esto desalentaba el emprendimiento. A pesar de este revés, asegura que ahora se trabaja en facilitar estos procesos y dar confianza.

“El Gobierno actual está interesado. Antes no se generaba confianza porque no veían bien el tema de la retribución al sector privado” dijo.



Porcentaje de población con alcantarillado, pozo séptico y pozo ciego (nacional, urbano y rural, 2007-2016) demuestra brechas importantes | *The percentage of the population with access to sewer systems, septic tanks and latrines (national, urban and rural, 2007-2016) demonstrates significant shortfalls.*

damaged in the earthquake of April 2016, which has affected the provision of services.

The report says that: “In absolute terms, the population without access to piped water services, either non-shared or shared between households, is concentrated in the rural areas of small and medium-sized municipalities in the Costa region, and in the urban areas of the medium-sized cantons of the same region (129,000, 95,815 and 83,722 households respectively). Together, these areas account for 71.5% of the population with access to the service”.

The report also estimates that total investment of USD 7,331 million is required to achieve universal coverage. Wastewater treatment would account for the lowest percentage of this investment (14% or USD 1,016 million).

The prospects

ALADYR consulted Simona de Filippis, a representative of the Italian Chamber of Commerce in Ecuador about the challenges and growth prospects of Ecuador.

“The government is seeking foreign investment. The problem is that the legal situation is not conducive to confidence. The country risk is high”, she says, with an ensuing “high vulnerability” in terms of investment.

However, Ms. De Filippis acknowledges that the current government is seeking to improve the indicators in order to attract the capital that would enable targets to be met.

She also points to positive initiatives, such as the trade agreement entered into by Italy, Ecuador, Colombia and Peru in 2017. According to the figures at her disposal, this has enabled an increase in imports whilst also boosting raw material exports to the European market.

The Chamber of Commerce representative also feels that “Ecuador has to be more competitive and more productive” and that to achieve this, the country must go beyond raw material exports. “There are sufficient investment opportunities”.

Eddie Ceballos, ALADYR representative in Ecuador, believes that “The PPP model was not clearly defined”, a fact which discouraged entrepreneurship. Despite this problem, he points out that work is now being done to facilitate PPP processes and create confidence.

Terremoto de 2016 destruyó parte de la infraestructura de servicio | *The 2016 earthquake destroyed some of the service infrastructure.*



“The current government is interested in this model. Prior to this, confidence was not created because the idea of remunerating the private sector was frowned upon”, he says.

Mr Ceballos explains that, to date, funding for

sanitation infrastructures has mainly come from international funds to help achieve the Sustainable Development Goals and that some municipalities had fine-tuned all the processes associated with accessing this aid. “Thanks to this, some important sanitation infrastructure projects have been possible”.

Regarding the context of the current pandemic, he feels that the crisis could make institutions aware of the need for improved sanitation to protect public health.

Mr Ceballos adds that the investments that have been made in Quito are very complete in the sense that they are associated with processes that even include energy recovery, and that the financing bodies view these projects very positively.

Reúso de agua para procesos industriales

Reuse of water for industrial processes

According to the ALADYR representative, Ecuador has begun to look at water reuse as a solution for sustainability.

In his opinion, industry is always subject to environmental authority demands and the institutions now have a greater capacity to monitor the quality of effluents discharged. For this reason, the business community has begun to accept the inevitable need to invest in effluent treatment.

“The issue is that the legislation is such that compliance with it results in water fit for reuse” says Eddie Ceballos.

He adds that transnational companies currently implement water reuse more, due to internal standards.

Regarding investment opportunities in this area, Mr Ceballos points out that Ecuador has a smaller industrial market than its neighbouring countries in the region. However, he says that the market is developing, which is something that can be availed of.

In conclusion, it can be said that Ecuador offers advantages for those with the vision to invest in markets that may be considered risky but with considerable development potential. The government is striving to maximise the attraction of investment and proof of this is to be found in the long-awaited Vindobona wastewater treatment megaproject (USD 900 million), for which financing is being sought through the implementation of a PPP model.

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