

Foreword

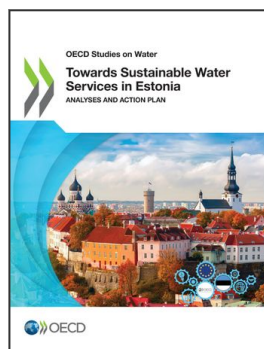
The Estonian Ministry of Environment called on the OECD in 2020 to facilitate a national policy dialogue focused on aggregation of utilities as a condition to set water supply and sanitation services on a sustainable path. The OECD is grateful for this invitation to support an ambitious reform agenda.

The report captures the main analyses and policy discussions, which informed the policy dialogue on water in Estonia. The analyses were initially clustered in several project outputs, compiled here as chapters of the report. Some analyses and policy discussions are likely to be relevant for countries considering options to enhance the performance and financial sustainability of water supply and sanitation services.

The active and constant support of the Ministry is acknowledged. Special thanks go to Karin Kroon, Raili Kärmas, Liisi Arm, Tatjana Rõõm for the time and expertise allocated to this project. The Ministry was particularly successful in engaging with a range of stakeholders, through co-presence or virtual meetings. The active engagement of the Competition Board – most particularly Aurelie Grenman - was much appreciated.

The project was undertaken in collaboration with – and with the financial support of – the European Commission DG Reform. This collaboration and support have been particularly fruitful. The OECD Secretariat thanks Mauro Sibilia for a pragmatic and problem-solving attitude throughout the process.

The project was undertaken by the OECD Environment Directorate (Tatiana Efimova), with substantial contributions from the OECD Centre for Entrepreneurship: Oriana Romano shared her understanding of the governance of water utilities and Maria Salvetti contributed her extensive knowledge of aggregation processes in Europe and beyond. Tim Keyworth (Keyworth Consulting) played a pivotal role, in particular in relation to tariff policy and the role of economic regulation to enhance the performance of water utilities; the OECD Secretariat benefitted from most inspiring discussions on these and related issues. Ain Kalme (Attorney-at-Law, Trinita Estonia) provided robust legal analyses and options. The OECD Secretariat thanks Andres Aruhein, who shared his vision early in the process. Xavier Leflaive, the OECD Environment Water Team Leader, co-ordinated the process and contributed his vision on consolidation options and sustainable water services. Ines Reale provided impeccable support to the project. The work was conducted under the overall supervision of Walid Oueslati, Acting Head of the Environment, Transitions and Resilience Division of the OECD's Environment Directorate.



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