



Kingdom of the Netherlands



Dutch Solutions, Indian Opportunities

Building Resilient and Sustainable Water Systems
through India-Netherlands Collaboration

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Netherlands Country Session
'Success stories in water management, food security and source sustainability'





Netherlands

India Market Scan

The **Indo-Dutch Centre of Excellence on Water** provides a framework for long-term cooperation between India and the Netherlands.

Purpose of the Market Scan

- Understand key developments and challenges in the Indian water sector
- Identify areas where Dutch knowledge and technology can contribute
- Connect Indian needs with relevant Dutch expertise
- Support the development and scaling of joint initiatives

Goal: Strengthen effective and long-term Indo-Dutch cooperation in the water sector.

NL Results:

Main finding: strong demand, but not an easy market



INDIA HAS MAJOR WATER CHALLENGES
and large programmes such as Namami Gange, Jal Jeevan Mission, Smart Cities and AMRUT.



OPPORTUNITIES FOR DUTCH EXPERTISE,
but procurement is fragmented, price-driven
and often difficult for smaller foreign companies.



**GUJARAT, MAHARASHTRA AND
UTTAR PRADESH**
stand out because of industrial growth,
stricter regulation and investment in
water infrastructure.



THE HIMALAYAN REGION
is relevant for climate-driven water security,
hydrology and basin planning.



Real opportunities exist. Success depends on the **right partners**,
local presence and **smart navigation** of the market.



NL Results:

India – Netherlands Centre of Excellence on Water

Indian clients want proof that solutions work under local conditions. Pilot projects and demonstrations are essential.



The India–Netherlands Centre of Excellence on Water

should offer:



Matchmaking

Connect Dutch companies with Indian stakeholders and decision makers.



Pilot coordination

Facilitate pilot projects and demonstrations to prove solutions in local conditions.



Market intelligence

Provide insights on market trends, opportunities and regulatory landscape.



Tender information

Share early-stage tender opportunities and procurement updates.



Training and capacity building

Strengthen skills and knowledge through training, workshops and knowledge exchange.



Long-term engagement and visibility

Build lasting partnerships and visibility for the Dutch Water Sector in India's water agenda.



Working together for sustainable, resilient and future-ready water solutions | India and Netherlands – Partners in Water

Your Recommendations



For Dutch government, embassy, NBSO



Support access to Indian Ministries, States and implementing agencies.



Improve tender intelligence and market insights.



Provide support in financing models and instruments.



For RVO, Netherlands Water Partnership (NWP) and Water Alliance:



Coordinate information and activities



Maximize the potential of the Indian Water Platform.



Support SME consortia and joint market approaches.



Organize thematic missions focused on priority sectors and states, rather than generic trade visits.



Working together to unlock opportunities and drive **sustainable water solutions** between India and the Netherlands

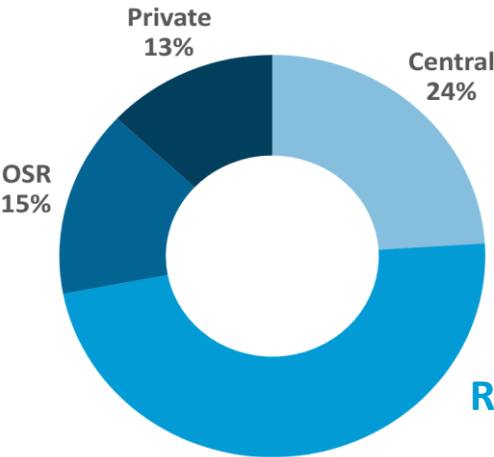


Investments in India’s water sector and focus areas for the next 5 years

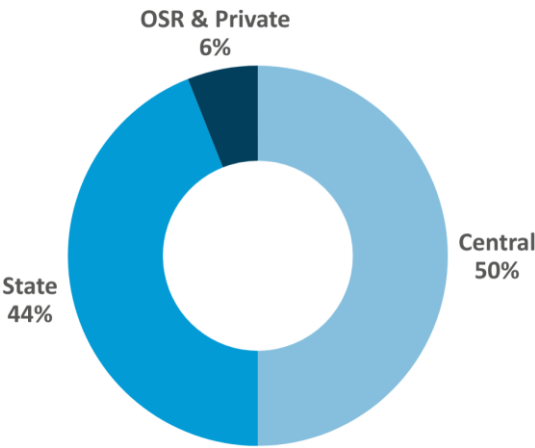
EUR 118 billion

Allocated through 16 schemes/ missions
(till 2028)

Urban India



Rural India



EUR 88.4 billion

Recommended by 16th Finance Commission for next five-years (2026-31)

Urban water & river management	AI & geospatial application	Modelling & managing river dynamics	Monitoring & modelling of water quality	River economy and finance
Circular water management	IoT integration & automation	Climate change impact & adaptation planning	Real-time monitoring	River-basin modelling & water accounting
Integrated water resource management	Data integration across administrative & hydrological units	Groundwater mapping & modelling	Water & used water treatment efficiency	Adoption of innovative financing mechanisms
		Flood forecasting & early warning		

Estimates on future investment needs of water sector



EUR 395.3 billion

required till **2036** for provision of
basic municipal services

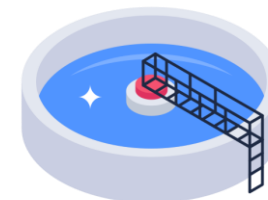
(water supply, sewerage, and
stormwater drainage)



EUR 24.2 billion

required till **2035** for inter-basin
water transfers projects

Of this, **around EUR 18.6 billion**
will be opened up for EPC model
(private firm)



EUR 15.8-23.3 billion*

required by **2047** for achieving the
national target of 100 per cent
treatment of used water

*estimated range varies with the
treatment technology adopted

Recommendations for Dutch companies



Deploy **advanced wastewater treatment technologies** such as aerobic granular sludge, direct nanofiltration, and high-rate anaerobic reactors to address India's need for compact, energy-efficient, and resource-recovery-driven used water treatment solutions.



Leverage **government support through the CoE on water, such as at IIT Delhi**, as a matchmaking and facilitation channel. Engage with industrial networks, such as Federation of Indian Chambers of Commerce and Industry (FICCI) and Confederation of Indian Industry (CII), for introductions.

Thank you

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