

McDonald, D.A. 2019. Will the empire strike back?
Powerbrokers and remunicipalisation in the water sector.
Water Alternatives 12(2): 348-359



Will the Empire Strike Back? Powerbrokers and Remunicipalisation in the Water Sector

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ABSTRACT: Literature on remunicipalisation in the water sector has focused almost entirely on the ambitions, practices and ideologies of people and organisations that are in favour of publicly owned and managed water services. By contrast, little is known about what private water companies and mainstream water organisations have to say on the subject. This paper puts forward the results of interviews with 47 such organisations, offering the first rigorous insights into what these institutions know about water remunicipalisation, why they think it is happening, and what (if any) plans they have to engage with it in the future. The results are both predictable and surprising, demonstrating a clear concern about remunicipalisation on the part of private firms but a remarkable lack of knowledge about where and why it is happening, and no obvious plans to counteract this trend beyond fighting it on a case by case basis. Multilateral institutions, NGOs and water associations insist on being 'neutral' when it comes to questions of public versus private water delivery, although this position is undermined by practices which tend to favour private sector provision. There does not appear to be any coordinated anti-remunicipalisation movement, but a lack of enthusiasm for it from influential global water organisations suggests that advocates of remunicipalisation can expect little in the way of support from 'powerbrokers' in the water sector.

KEYWORDS: Remunicipalisation, water, multilaterals, aid agencies, private companies, NGOs

INTRODUCTION

Literature on remunicipalisation in the water sector has focused almost entirely on the ambitions, practices and ideologies of people and organisations that are in favour of public ownership and control of water services. By contrast, little is known about what private water companies and mainstream water organisations have to say on the subject. There has been anecdotal coverage of private sector reactions to remunicipalisation efforts in the media (see De Clercq, 2014), but no systematic investigation of what private water companies think about the larger remunicipalisation trend, or how (and if) they plan to address the matter.

Similarly, almost nothing is known about the opinions of large international agencies that work on water issues, including multilateral organisations such as international financial institutions and UN agencies, bilateral aid organisations, NGOs, and national/regional water associations (umbrella agencies that represent local water operators). These organisations have been largely silent on the topic. References to remunicipalisation are virtually non-existent on the websites of major water-related institutions, and none of the organisations interviewed for this article had an official policy regarding this issue. It is as if remunicipalisation did not exist for the world's largest and most influential water agencies.

This paper outlines the results of interviews with 47 such organisations, offering the first rigorous insights into what these institutions know about water remunicipalisation, why they think it is happening, and what plans (if any) they have to engage with it in the future. The data does not claim to be statistically representative of the thousands of different water actors operating around the world, but it is a

reasonable representation of important and persuasive organisations based in Europe and North America.

I refer to these organisations as 'powerbrokers' because, collectively and individually, they have considerable influence on water policy and funding. They also play a key role in shaping global debates and practices, including discussions of public/private service delivery. I use the term 'mainstream' because these organisations tend to hold similar dominant views on water governance, and often work together on major international water policy campaigns, sharing best practices and coordinating funding initiatives. In short, they have enormous influence in the water sector in general and have the potential to dramatically affect the future of remunicipalisation.

The article begins with a description of interviewees and of the sampling methods employed. This is followed by a summary of interviewee interpretations of the 'what and why' of remunicipalisation and an extended discussion of their stated – but deeply problematic – position of 'neutrality' when it comes to public versus private¹ water delivery. The subsequent section examines possible strategies of private water companies in dealing with the growth of remunicipalisation and the potential for a coordinated counter-attack.

METHODOLOGY

Data collection for this research took place over a five-month period, from January to May of 2018. Where possible, face-to-face interviews were conducted, but when this was not feasible for logistical or budgetary reasons an online survey was employed. A total of 47 organisations participated, with 24 interviews conducted in person (including two Skype interviews), and 23 were conducted online. All interviewees were asked the same questions, including how familiar they are with remunicipalisation, why they think it is happening, whether they think it is a positive or negative development, how engaged they have been on the topic, and what they think is going to happen in the future (see Table 1 for a complete list of questions). Personal interviews were typically longer and more detailed than online responses, with many respondents keen to talk for well over an hour. Answers, however, were remarkably consistent across both platforms.

Table 1. Questions asked of interviewees.

1. When you hear the term 'remunicipalisation' what does it mean to you?
2. Are there examples of remunicipalisation in the water sector that you are aware of?
3. Why do think remunicipalisation is happening in the water sector?
4. Do you think remunicipalisation is a positive or negative development in the water sector?
5. Does your organisation have an official position on remunicipalisation?
6. Does your organisation have an official position on privatisation?
7. Has your organisation ever been directly involved in remunicipalisation debates?
8. Has remunicipalisation changed the way your organisation operates?
9. Has your organisation dedicated any resources to research or lobbying on remunicipalisation?
10. Does your organisation have any plans to engage in debates about remunicipalisation in the future?
11. In your opinion, what are the most influential organisations in the world today when it comes to debates over remunicipalisation?
12. What do you think are the biggest obstacles to water remunicipalisation in the future?
13. What do you think are the biggest opportunities for water remunicipalisation in the future?
14. Do you think that in the future remunicipalisation will grow, slow down, or stay about the same?
15. Is there anything else you would like to say about remunicipalisation in the water sector?

¹ I use the term 'privatisation' in this paper to refer to the full spectrum of private sector engagement in the water sector, from divestiture to all forms of public-private partnerships (PPPs). This definition was explained to interviewees.

The vast majority of interviewees were based in Europe and North America, in part because this is where the bulk of multilateral agencies, bilateral funders, large NGOs and multinational water companies are located. The initial sampling included water associations in Asia, Africa and Latin America, but response rates from these regions were very low, partly because of the difficulty of identifying a suitable contact person on the organisations' websites and partly because of organisational cultures that appeared to be less receptive to outside engagement. (Numerous water associations in these regions refused to provide any information.) As a result, responses are biased towards institutions in the Global North, resulting in a research gap in need of further investigation. However, given the hegemony of mainstream approaches to water governance globally, it is not clear that powerful water agencies based in the Global South would necessarily have opinions different from those expressed by the organisations represented here (Goldman, 2007; Molle, 2008; Ahlers and Zwarteveen, 2009; Boelens and Vos, 2012; Loftus, 2015; Furlong et al., 2016; Crow-Miller et al., 2017).

Even sampling this limited target group presented a daunting challenge. There are hundreds of important NGOs and multilateral/bilateral agencies working on water and hundreds of water associations, with many countries having multiple associations that are often delineated along service lines such as sewerage, irrigation, potable water and bulk water. There is an even more confusing array of regional associations working across borders, particularly in Europe. There are also an untold number of small private water companies operating around the world, although the focus on large multinationals made that task more manageable.

A final list of potential interviewees was determined by a combination of my own understanding of 'powerful' international actors in the water sector, the need for a reasonable geographic spread, a balance of institutional types, and some snowball sampling (see Table 2). The list included 115 possible organisations across five different categories, with the number of actual interviews determined by a mixture of response rates, saturation, and time and budget constraints. In the end almost half the organisations identified were interviewed. There were notable exceptions to this uptake, however, with low response rates from water associations and a mixed set of responses from private water companies. Of the latter, some simply ignored the request (despite repeated follow-ups), while others politely refused ("this is not for us") or continually postponed an interview until deadlines had passed. A few firms were openly confrontational, as illustrated by this email from a senior executive in a large global water company: "PPPs [public – private partnerships] are moving forward with far more advancement than what you are writing about. Sad 😞. I can guess who is paying for your 'study' (...). You could certainly spend your time on better things, such as how to fix the infrastructure problems being faced by many cities and municipalities" (emoji in the original).

Such reactions from private water companies are understandable. Given the sensitivity of the topic and my own (easily Googled) publication record on privatisation and remunicipalisation, it was not clear if any private sector representatives would be willing to be interviewed. In the end, however, more than a third of those contacted eagerly agreed to take part, with several going out of their way to accommodate my schedule. The rationale for this enthusiasm is multiple and overlapping: some wanted to learn more about what they see as a growing threat to their business; some were keen to convince me of the 'indisputably positive' track record of private water companies; others wanted to use the opportunity to make a case against remunicipalisation; a few even hoped I could provide them with 'insider information' on what was planned for remunicipalisation in the future!

All potential interviewees were provided with a detailed letter of introduction outlining the purpose of the study, including a brief description of remunicipalisation, and were given the option of conducting a personal interview or filling in an online survey. All candidates were also given the choice to remain anonymous. A large majority of respondents opted for this because of what they felt to be the sensitive nature of the topic and/or because their organisation did not have a formal position on the matter. This concern with confidentiality was palpable and may have been one reason that some organisations declined to participate.

Given this widespread concern with privacy, I have chosen to anonymise all the interview data in this paper. Identifying only a handful of organisations would not be ethically appropriate and could serve to distract the reader from the larger messages. More importantly, given how consistent the interview responses were, it seemed more effective to focus on the tone and content of the replies rather than the individuals and organisations providing them. All interviewees, however, did agree to being quoted for illustrative purposes providing they remained anonymous.

In the end, this sample of organisations does have its limitations and future work on the topic will no doubt reveal new insights and more nuance. It does, however, provide a reasonably representative illustration of what major powerbroker organisations in the water sector think about remunicipalisation. Not all are household names, but they represent a who's who of important players in their regions, sectors and institutional categories, and all interviewees were senior members of their organisations (directors, vice presidents, etc). Some of the organisations are amongst the most powerful institutions in the world, with massive budgets and the capacity to shape global policymaking discourse and action on a wide range of topics.

Table 2. Interviews conducted.

Type of organisation	Number of organisations contacted	Online surveys completed	Face-to-face interviews completed	Total interviews completed
Private water companies/federations	32	6	5	11
Multilateral agencies	19	5	7	12
Bilateral aid organisations	11	1	4	5
National/regional water associations	32	7	2	9
NGOs	21	4	6	10
Totals	115	23	24	47

WHAT IS THIS THING CALLED REMUNICIPALISATION?

Perhaps the most remarkable finding of the research was how few of the interviewees had heard of remunicipalisation, or variations on this term,² and how little they knew about it even after it was explained in person, in the letter of introduction, and in pre-interview emails. Some interviewees, in advance of the meeting, asked for more information on the topic and for recommended readings. In fact, many of the organisations contacted declined to do an interview for exactly this reason, with a common response being: "I'm afraid that the topic in question is one that we do not have specific focus or expertise on so we will not be able to respond to your interview request". Private water companies were all aware of the trend, but even here their knowledge was remarkably limited given that it poses a potential existential threat to their operations.

² Different terms have been used to describe this phenomenon including de-privatisation, reclaiming public services, contracting back in, taking services back into public hands, insourcing, and social reappropriation. Some of these reflect the different institutional and ideological characteristics at play. We have opted to use the (admittedly inelegant) term 'remunicipalisation' for all the research papers in this issue because most water services are in fact operated at the municipal level, and because it has become the most widely used term in the literature. It should be noted, however, that in some cases water services are being made public at the national or regional level while in others they are being made public for the first time, in which case the appropriate term is 'municipalisation'.

Most organisations commented during the interview that it was the first time they had discussed the topic. None had done any formal research on remunicipalisation, none had official policy positions on it, and most doubted that they would engage with the topic in the future. Many agreed to participate simply because it sounded interesting and they hoped to learn more.

Even those who were aware of remunicipalisation gave vague definitions of it and made general references to water services moving from private to public. None of the interviewees referred to the complex and varied institutional forms of remunicipalisation taking place or to the multiscale nature of change, and there was no discussion of the broader political demands for greater accountability, participatory decision-making, community control, de-commodification, and so on (Kishimoto et al., 2015; Kishimoto and Petitjean, 2017; McDonald, 2018).

For these interviewees, remunicipalisation was seen as a purely technical matter, a movement from private to public management that was based largely on economic performance, not social choice. Indeed, economic performance is one of the reasons that remunicipalisation has been taking place in some countries, notably in the United States (Hefetz and Warner, 2004, 2007; Bel et al., 2010; Warner and Hefetz, 2012). This technical/economic approach, however, ignores trends towards remunicipalisation that are deeply political, with far-reaching demands for social and ideological changes to the production and management of water services (Pigeon et al., 2012; Spronk et al., 2014; Wollmann et al., 2010; Kishimoto and Petitjean, 2017; Cumbers et al., 2017; McDonald, 2018).

When it came to identifying actual cases of remunicipalisation most respondents struggled to think of even a single example. Those who could do so tended to remember instances in their own country or region, or would refer to the most famous examples to date: Paris and Berlin (see Pigeon, 2012; Beveridge et al., 2014). There were a handful of references to remunicipalisations in Latin America (Buenos Aires and Cochabamba in particular) and two people cited developments that were unfolding in Cameroon at the time of the interviews (early 2018). There were no references to Asia and very few to North America, even from US-based interviewees – this despite the fact that the United States has experienced the second-largest number of recorded remunicipalisations in the world (or 'contracting back in', as it is referred to there) (Bel et al., 2010; Warner and Hefetz, 2012).

Nor was there a sense of the scale and pace of remunicipalisation in the water sector. There were some references to remunicipalisation being a 'trend', but only one person commented on the magnitude of change, stating that there were 40 cases to date, citing a study they had read in preparation for the interview. All were surprised when told that there were at least 267 cases of water remunicipalisation in 37 countries, affecting more than 100 million people since the early 2000s (Kishimoto and Petitjean, 2017).

THE PENDULUM EFFECT

When asked why they thought remunicipalisation was taking place in the water sector, most interviewees were silent. "This is not something we follow so I don't have much to say", was a common response. When pressed on the matter, interviewees tended to give one or more of the following answers. First, and most common, was the argument that remunicipalisation is little more than a 'pendulum effect', with governments constantly swinging back and forth between state-driven and market-driven development models for pragmatic reasons. They did not blame privatisation, per se, but rather the notion that "privatisation is not perfect" and "does not work in all contexts". As such, remunicipalisation is seen as a "natural consequence" of capitalist economies and proof that markets actually work by removing poor performers. According to a representative from one large multilateral agency, "We don't talk about remunicipalisation, we think in terms of failed public – private partnerships (...). Businesses fail in other sectors, why not water?" Some of the private water companies interviewed even saw remunicipalisation as a "welcome development" because it helps to "weed out the bad eggs", giving "good companies" an opportunity to remind people that privatisation can work.

Once again, these insights are not inconsistent with the reality of remunicipalisation in some countries, where contracting-in and contracting-out swing back and forth over time. As noted above, this pattern is best documented in the United States where there has been a remarkably consistent fluctuation of insourcing and outsourcing for largely practical reasons (Hefetz and Warner, 2004, 2007; Warner and Hefetz, 2012), but this pendulum explanation does not take into account the deeper ideological dissatisfactions with private water delivery that drive remunicipalisation in many other parts of the world. In those instances, the concern is with corruption, its impact on equity, and its commodification of people's relations with water providers (see, for example, the case studies of Jakarta, Sofia, Barcelona and Marseille in this issue). Remunicipalisation was framed by interviewees more as a validation of the contract system than as an illustration of its problems.

Indeed, many interviewees rejected ideology as a valid reason for remunicipalisation, arguing that remunicipalisation advocates do not understand the complexities of PPPs or the potential to renegotiate the terms of a private contract once it is in place. For these interviewees, remunicipalisation is driven by "misinformed people on the left" with a "knee-jerk reaction" to privatisation who are "highly emotional" and use remunicipalisation as a "symbolic gesture to win ideological political points": "If you are opposed to privatisation you are in favour of remunicipalisation". Some interviewees insisted that there is no empirical evidence to suggest that public water agencies can outperform private ones and argued that opinion polls consistently show that the majority of water consumers are happy with private water operators (despite growing evidence to the contrary – see, for example, Anon, 2018; Ramirez and Lewis, 2018).

Some interviewees saw the rationale for remunicipalisation in more sinister terms, pointing to a growth in "nationalist politics" and a backlash against foreign companies, arguing that "irrational thinking" rather than good economics is what is driving much of the push to make water public again. There is some truth to this argument as well, as demonstrated in the cases of Hungary (Horváth, 2016) and Bulgaria (see Medarov and McDonald in this issue).

Only a handful of respondents felt that remunicipalisation is taking place because "privatisation is failing". These interviewees argued that private water companies are "unscrupulous" and "greedy", and expressed a "nervousness about the capitalist process". They saw "water as a public good that should not be treated like a commodity". One such respondent argued that there is a structurally different set of criteria that informs the decisions of public water operators than private, with "private companies operating within a narrow time window which limits their choices and decisions". Such comments were few and far between, however, and respondents who made such critical remarks about private water companies were particularly keen not to be identified.

NEUTRALITY?

When asked if their organisations had formal policy positions on remunicipalisation, all interviewees gave an emphatic "no", claiming that their institutions were "neutral" on the matter of public versus private water services and arguing that "both do a good job, it just depends on the context". These interviewees stated that their organisations would not support or refute remunicipalisation, pointing instead to "the need for clear and consistent principles of water governance", which is to say transparent service delivery mandates coupled with effective and accountable management (public or private). They argued that, "It is up to people in each location to choose what they think is best for them in terms of public or private water delivery".

Some interviewees were visibly annoyed by the question, insisting that the debate over public/private "is over" because both public and private can work, arguing that this debate diverts us from the pressing need for action. ("It's a waste of time. We need to focus on getting water services to poor people. What really matters is good governance".) One NGO representative was particularly incensed, claiming that "I have yet to meet a poor person who is wringing their hands about whether water is public or private.

Metropolitan elites are the only ones who care about it. It's a distraction from the real mission. Personally, I find it really boring".

Even representatives from public water associations who were interviewed stated that they had no official position on remunicipalisation. Many were proud of their public orientation but did not disparage their private sector counterparts nor dismiss the notion of water privatisation. Their concern was also "good governance". In cases where public water associations advise policymakers outside their own country, they were adamant that they do not try to persuade others to implement their public model. ("We tell them what works for us and let them decide if they want to adopt it or not".) The emphasis here was once again on the notion of neutrality.

Some water associations were a combination of public and private operators, but there appeared to be no conflict between them. A few of these associations commented that remunicipalisation had made internal relations "a little awkward" between members at times, but for the most part it was business as usual, sharing the same benchmarking tools, attending the same conferences, and collaborating on policy developments in the water sector. Indeed, many of these public water agencies appeared to share the same commercialised operating principles as their private counterparts, with a focus on cost recovery and market-led economic growth. There was little reference to water's social, cultural or spiritual significance when speaking to the question of 'public'. Water services were largely seen as a matter of technocratic competence.

But this apparent commitment to neutrality dissolves in the face of actual practice on the ground. A large majority of the interviewees from bilateral and multilateral aid agencies actively support private sector engagement in water services through loans, grants or administrative assistance. Between 2015 and 2017, for example, the Public – Private Infrastructure Advisory Facility received more than US\$41 million in assistance from some of the multilateral and bilateral donors interviewed for this research, much of it for supporting PPPs in water services (PPIAF, 2017). Additional indirect support from these organisations comes in the form of pro-privatisation conferences, advisory teams sent to help governments set up PPPs, the publication and promotion of pro-privatisation research materials, and the facilitation of private capital for water service expansion. As one interviewee from a large multilateral organisation proudly put it, "private finance [is] the new mantra" of engagement in the water sector.

Such findings will come as no surprise to most readers. There is extensive and well-established literature documenting the role of powerful international agencies in the privatisation of water (Bayliss, 2013; Harris et al., 2015; Ahlers and Merme, 2016). But when pressed on this apparent bias, everyone that was interviewed denied any private sector prejudice in their organisation, insisting that they were 'neutral'.

To be fair, many of the organisations interviewed do provide support for public sector capacity-building in water services: training personnel, lending money to expand infrastructure, etc. Even with this work on 'public' water, however, there tends to be a bias towards commercialised forms of water delivery. This is often in the form of corporatisation with an emphasis on the financial bottom line, together with private sector management principles where the notion of 'customers' is promoted over that of collective 'citizenship' (Castro, 2008; Clarke et al., 2007; McDonald, 2014, 2016). The degree to which this ideology is promoted varies across institutions, but it is noteworthy that concepts of 'public' tend to be commercial in their orientation, even among public water operators.

By contrast, not one of the organisations interviewed provides direct funding or administrative support for remunicipalisation and all clearly stated that, as part of their commitment to 'neutrality', they have no plans to develop such support mechanisms in the future. When asked how they would respond to a request from a government or civil society organisation to help remunicipalise their water services most seemed startled by the question, insisting that they have never encountered this in their work and do not expect it to happen in the future. When pressed further on the matter, several suggested that

they would do their best to help but would "remain neutral" and only provide technical assistance to support "the best decision for the context".

This lack of material and political assistance for remunicipalisation is not restricted to the organisations interviewed. Indeed, there is little indication of support from any major government agencies, even in Europe where remunicipalisation has been most active. As Petitjean (2017: 86) notes:

It would be difficult to name one government that is actually encouraging or even merely enabling remunicipalisation at the moment. As for the European institutions, they officially maintain some form of 'neutrality' towards the public or private management of essential services. But the culture prevalent at the Commission and the balance of power at the European Parliament and Council results in rules and legislations that, even when they do not directly favour the interests of large corporate players, tend to consider integrated, liberalised markets at the European level, where a handful of large for-profit players compete with each other, as the 'normal' way things should be organised. Big business knows how to make itself heard in Brussels, whereas the local governments and citizen movements that drive the remunicipalisation movement on the ground have a weaker presence, if any, in the European capital.

There are some opposition parties promoting remunicipalisation – most notably the Labour Party in the UK under Corbyn (Labour Party, 2018; Osomor, 2018) and an emerging cluster of smaller parties in Spain (Planas, 2017) – but support for remunicipalisation mostly takes place at a very local level with little in the way of resources from national governments or large international agencies, as the case studies in this issue also make clear.

PRIVATE COMPANY PLANS

Do private water companies have collective or individualised plans to respond to remunicipalisation? Given how silent they have been on the topic it is difficult to know, although silence may be a deliberate strategy in the hopes of not attracting further attention to the topic. And yet some private water firms seem to welcome the debate, seeing it as an opportunity to "weed out the bad eggs" and to "showcase our good performance". Some of the companies which have adopted this strategy were particularly keen to participate in the research. These interviewees were passionate about privatisation and spoke at great length about the role they feel private water operators have played in improving water services in general and, in particular, advancing the United Nation's human right to water. They were also at pains to note that they are not opposed to public water delivery – all pointed to examples of well-run public water operators and commented positively on collaboration with public agencies in global and regional forums. All were keen to be seen as "responsible corporate citizens", filling in where public water operators had failed or where state capacity was inadequate. For these interviewees, remunicipalisation is seen as an opportunity to "correct the misperception" that all private water companies are the same, and to prove that the contract system works to support well-performing companies.

Nevertheless, several of the company representatives interviewed admitted that they were worried that remunicipalisation was damaging their reputations. Many also noted that they were actively working to ease the concerns of their shareholders by telling them that remunicipalisation is unlikely to become a reality in the locations where they operate; the reasons being opposition by bureaucrats, complex and expensive legal deterrents, lack of feasibility because of the costs of reacquisition, and international trade agreements and investor – state dispute mechanisms that typically rule in favour of private companies (part of a "ten-point list" that one interviewee said their company uses in order to convince investors that they should "not be concerned"). There also appears to be some effort among private water companies to develop a coordinated response to remunicipalisation, with one interviewee acknowledging the formation of a five-to-ten-member task group working on the issue. This task group, however, is only working with private companies in their own country, and there was no indication of a coordinated, international strategy across private water firms. Indeed, remunicipalisation may be serving to heighten competition between private water operators rather than causing them to close ranks.

By far the most common response from private water companies to the threat of remunicipalisation has been to resist it locally. Most remunicipalisation efforts have faced stiff opposition strategies from incumbent firms including legal challenges, inflated buy-back prices, diplomatic political pressure, and the sabotaging of IT systems and infrastructure (Pigeon, 2012; Lobina, 2015). The case study papers in this issue provide some of the most extensive insights to date into how this resistance takes place and how it differs depending on the context and the players involved, including expensive public relations campaigns by private water companies to undermine grassroots mobilisation efforts. In most cases it is a proverbial David and Goliath battle, with a disparate and under-funded coalition of remunicipalisation advocates up against a well-funded multinational corporation with politicians and mainstream media on their side.

Will the empire strike back? Given the lack of inter-firm coordination, there is no indication that private companies are building a collective anti-remunicipalisation strategy. Nor would the optics of such a full frontal attack necessarily work to their advantage given the growing anti-privatisation sentiment worldwide (Calvário et al., 2017; McDonald and Ruiters, 2012; Nelson, 2017). Instead, most of the private-firm representatives interviewed for this research appeared to be developing new business strategies to deal with the long-term possibilities of remunicipalisation, including a shift towards shorter-term, lower-risk contracts with a focus on industry and financing (Hefetz et al., 2014; Bayliss, 2013; Loftus et al., 2018; Greiner, 2016; Marson and Maggi, 2018; Andrade et al., 2018).

The most likely scenarios for private sector resistance are one-off fights to defend water contracts in profitable locations, and moving to less financially risky sites and more lucrative sub-sectors such as water recycling and desalination. Each attempt to fight off remunicipalisation will likely involve its own set of tactics and alliances depending on context, with efforts to retain private contracts being highly localised in nature rather than based on a broader international defence of the contract system.

CONCLUSION

For proponents of remunicipalisation, what is to be learned from these findings? First and foremost, it is unlikely that there will be financial or technical support for remunicipalisation from powerful, mainstream water-related organisations in the near future. If the sampling in this survey is in any way representative of the opinions of major institutions that shape water policy, the vast majority are not aware of what is happening with remunicipalisation, have little interest in learning more, and appear committed to a dogged – if contradictory – notion of 'neutrality' on the public/private question. For most of these institutions it will be business as usual for the foreseeable future.

This is not to suggest that there are not, or cannot be, cracks in the system. The once-hegemonic notion that private water operators are more efficient than public ones has been unravelling for some time, even among its most committed proponents (Ruckert et al., 2017; Hirvi and Whitfield, 2015; Isoh and Taylor, 2015). As noted by one senior executive from a large multilateral agency associated with the push to privatise water, "The Washington Consensus of the 1990s made sense at the time, but we can see now that it was overdone". Some interviewees were openly (if cautiously) sceptical of private sector participation. Educational outreach to these mainstream organisations by advocates of remunicipalisation could therefore be effective in creating more informed and sympathetic awareness of the remunicipalisation trend.

However, such outreach will also require frank conversations about past failures of public water services. Many remunicipalisation supporters are reluctant to criticise public water for fear of lending credibility to the privatisation agenda; however, three decades of austerity and a culture of top-down decision-making have made many public water services unaccountable, inefficient, and lacking in transparency. Remunicipalisation must therefore be seen as an opportunity for a critical discussion of what is meant by 'publicness', moving the debate away from stale binaries of 'public' versus 'private'. Teaching old dogs new tricks will not be easy though. Over the last few decades a global cadre of

neoliberal bureaucrats, policymakers, NGOs and multilateral institutions has been built up in the water sector. It will take a considerable amount of time to dismantle its entrenched technocratic perspective on water governance.

It is also important to be careful what one asks for. If mainstream NGOs and funding agencies were to get behind remunicipalisation, what policy advice might they offer? The result could be a push for corporatised public water utilities which employ private sector management principles – a remunicipalisation outcome labelled elsewhere as 'market managerialism' (McDonald, 2018) – which replaces a private form of commercialisation with a public one. Powerful water agencies could use their clout to shape the remunicipalisation debate in commercial directions, potentially marginalising more radical calls for public water service transformation.

The next decade could alter the terrain of this debate considerably. With hundreds of water service contracts around the world coming up for renewal, there could be a dramatic increase in remunicipalisation which could change the levels of engagement in the debate by otherwise 'neutral' institutions. Spain alone will see more than 90 contract concessions come to an end by 2025, and decision makers there will need to decide whether to renew these contracts or return these services to public hands (Planas, 2017: 146). Remunicipalisation may become a topic that mainstream water organisations can no longer ignore.

ACKNOWLEDGEMENTS

Funding for this research was provided by the Social Sciences and Humanities Research Council of Canada (SSHRC).

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