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Water and Urban Development Sector Portfolio

ADB-BMZ Germany Roadshow,
28 September - 02 October 2026,
Berlin, Germany

ADB | Sector Department 2

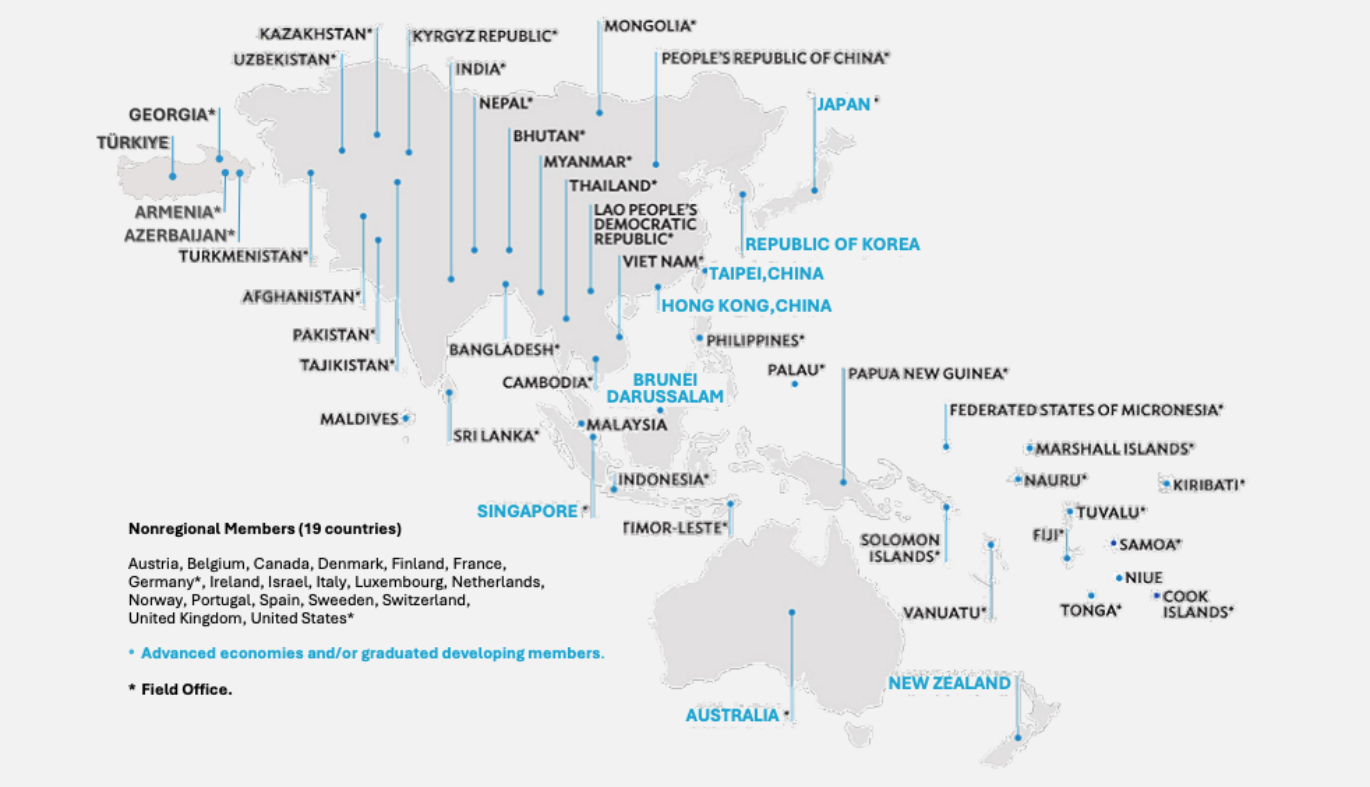
Asian Development Bank

ADB is a leading multilateral development bank supporting inclusive, resilient, and sustainable growth across Asia and the Pacific. Working with its members and partners to solve complex challenges together, ADB harnesses innovative financial tools and strategic partnerships to transform lives, build quality infrastructure, and safeguard our planet.



Main instruments: loans/grants, technical assistance, equity and guarantees – for sovereign and non-sovereign clients

Delivered through: ADB's own resources (ordinary; concessional; special funds) and cofinancing



ADB connects finance, knowledge, and reforms, for sustainable and resilient cities

CLIENT-CENTERED APPROACH Understand priorities • co-design context-fit solutions • stay engaged through delivery

$ FINANCING

Supporting bankable investments

- Sovereign and private-sector finance
- Cofinancing and partnerships

KNOWLEDGE & CAPACITY

Strengthen delivery, preparation to operations

- Diagnostics, feasibility, quality design, and readiness
- Implementation support and institutional capacity strengthening
- Operational sustainability: O&M and utility performance

POLICY DIALOGUE

Strengthen conditions for durable impact

- Align national, city and utility priorities
- Strengthen policy, regulatory and institutional frameworks
- Governance, service and financing reforms, where needed

LOANS, GRANTS, TECHNICAL ASSISTANCE, PARTNERSHIPS

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Water and Urban Development Sector: Key Challenges

Rapid urbanization and livability

- 56% of population in cities by 2030
- 600 million live in informal settlements in Asia
- Cities generate about 70% of total GHG emissions

Service gaps

- 220 million people lack access to basic water supply
- 520 million lack access to basic sanitation
- 80% of wastewater discharged untreated
- 1.5 billion tons of municipal waste generated per year by 2030

Climate resilience and capacity

- 40% of disasters triggered by natural hazards occur in the region
- Limited capacity and resources of local governments and utilities
- Operational sustainability of urban services

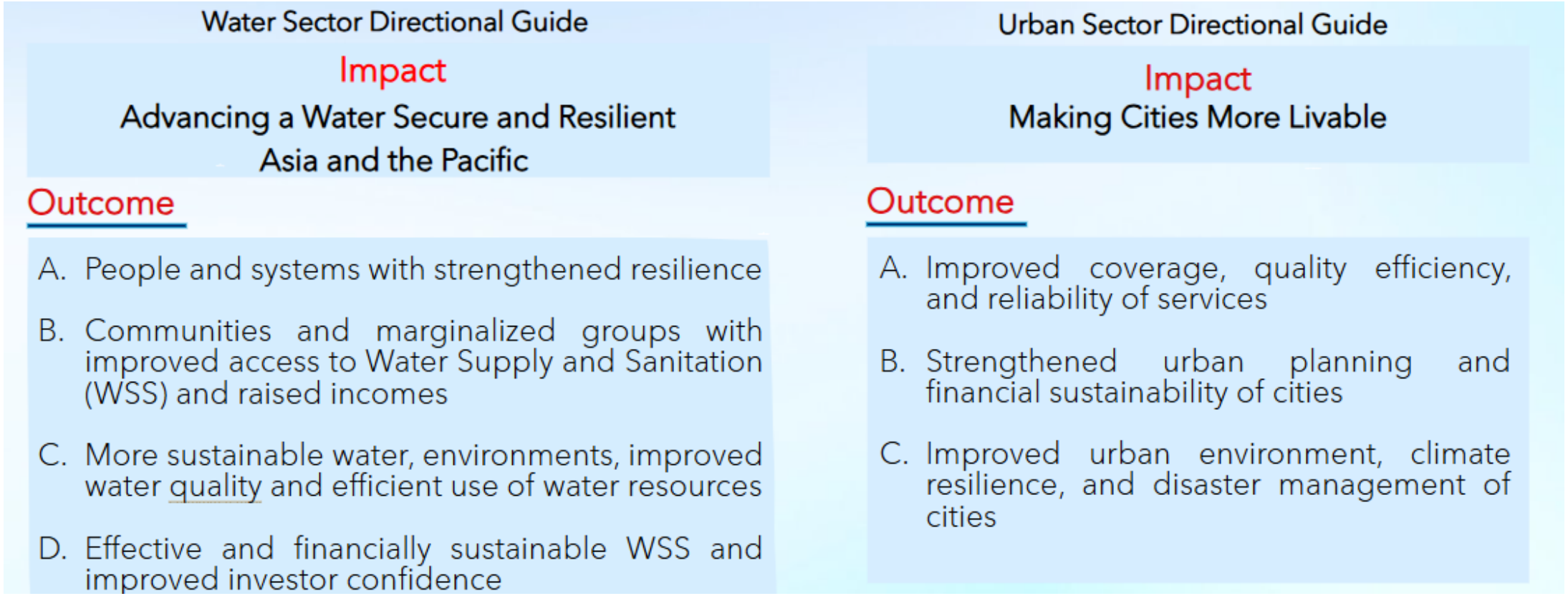


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Water and Urban Development Sector

Vision, Impact, and Outcome

Vision: Making Asia and the Pacific more livable, water-secure, and resilient

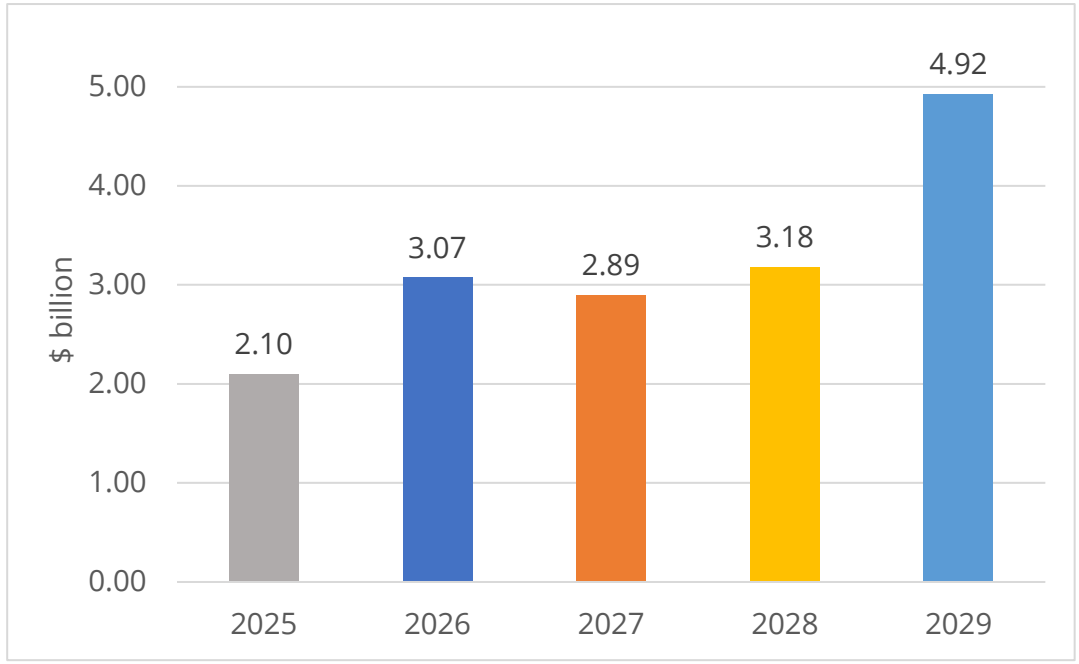


Source: ADB. 2022. Strategy 2030 Water Sector Operational Guide.

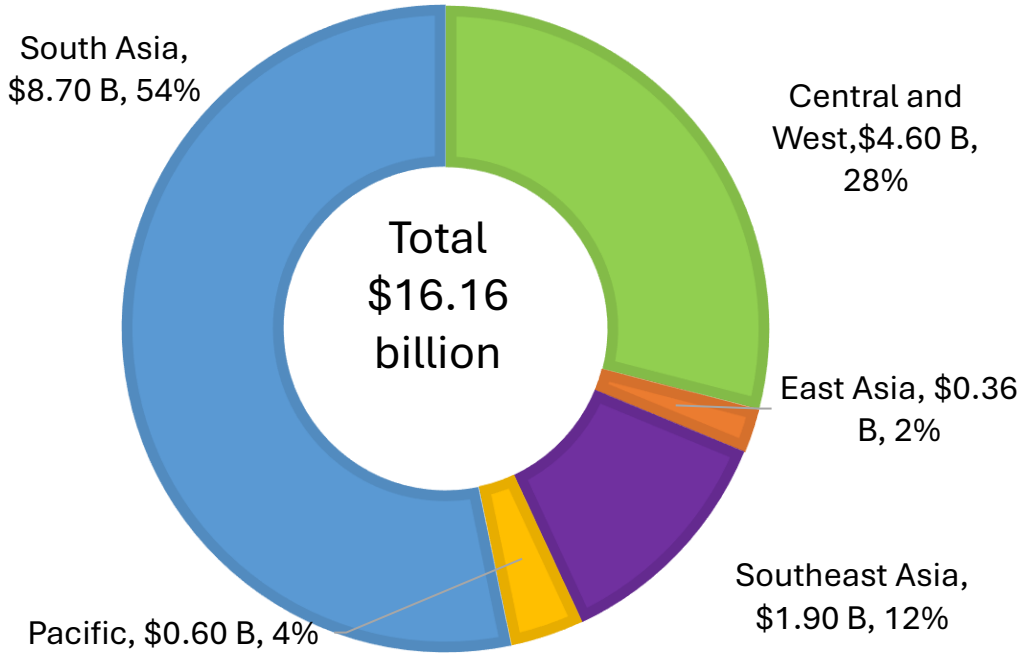
Source: ADB. 2022. Strategy 2030 Urban Sector Directional Guide.

How much we commit and where…

2025 Project Finance Commitments, 2026 Targets, and 2027-2029 ($ billion)



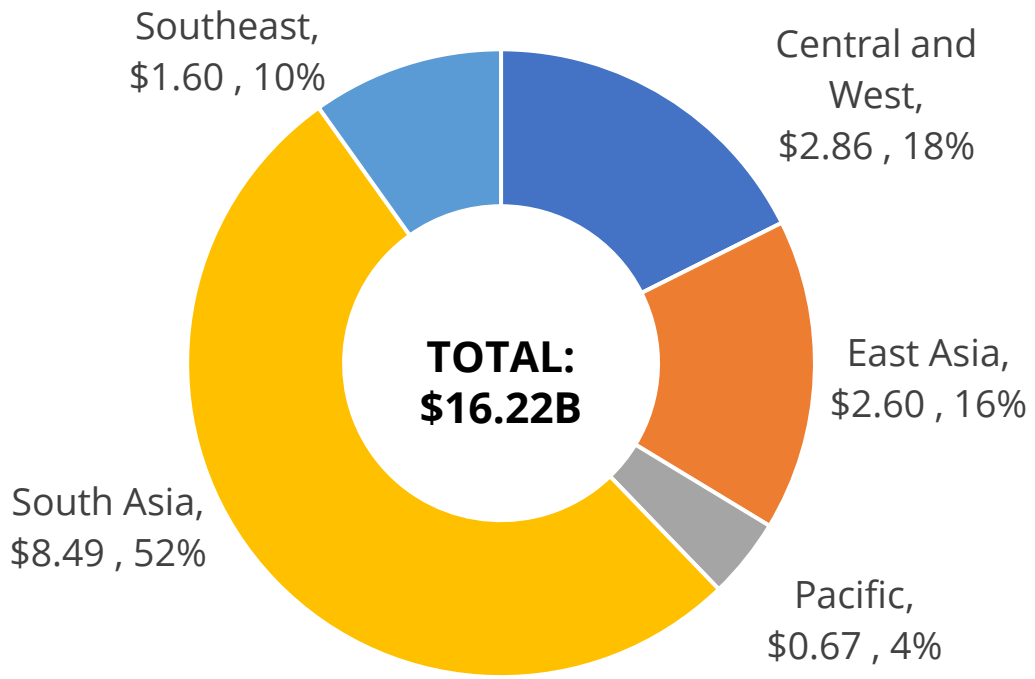
Project Finance Commitments by Region (2025-2029) ($ billion)



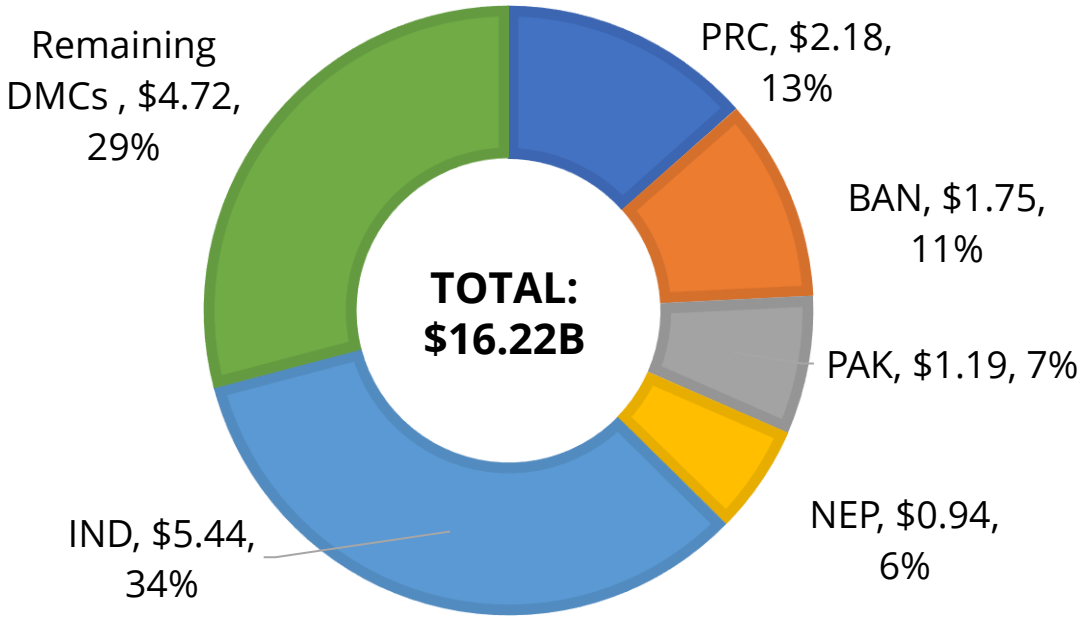
* Sovereign operation target. Data generated as of 31 July 2026.

Water and Urban Development: Active Sovereign Portfolio

Regional Breakdown ($ billion)



Top 5 Countries Portfolio ($ billion)



Top 5 Development Member Countries represent over 70% of the WUD portfolio.

Note: Excluding (i) all partial cofinancing from AFD, AIIB and OFID; and including committed projects (signed)
BAN= Bangladesh, IND= India, NEP= Nepal, PAK=Pakistan, PRC=Peoples Republic of Chian
Data generated as of 31 July 2026.

ADB Supports Water and Urban Development Sector

Amount in $ million

SUBSECTOR	Year				
	2023	2024	2025	Total	% of Total
Water Supply	407.35	571.69	663.25	1,642.30	**24%**
Sewerage	139.82	227.01	229.22	596.05	**9%**
Sanitation	198.25	381.74	11.72	591.71	**9%**
Flood Protection	175.31	173.90	362.42	711.63	**10%**
Solid Waste Management	105.71	382.59	6.00	494.30	**7%**
Housing	-	17.92	-	17.92	0.3%
Slum Development	30.00	7.00	-	37.00	1%
Renovation & Protection of Cultural Heritage	23.00	91.00	-	114.00	2%
Other Urban Services	214.49	737.32	339.11	1,290.91	19%
Urban Policy, Institutional, & Capacity Development	567.39	678.03	205.19	1,450.61	**21%**
TOTAL	**1,861.31**	**3,268.21**	**1,816.90**	**6,946.43**	**100%**

NOTE: The numbers are for water and urban infrastructure and other services (WUS) used in ADB's sector classification system. These are different from the commitments of the Water and Urban Development Sector Office.

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Water and Urban Development subsectors, approach, and priorities….

WATER SUPPLY



1. End to End Solutions
2. Non-revenue water
3. Efficiency/O&M
4. Household Connections
5. Pipeline Installation Technology
6. Digitalization

SANITATION and STORMWATER



1. End to End Solutions
2. New treatment technologies
3. Climate Resilience
4. Sewer Connection and Reuses of Treated Wastewater
5. Pipeline Installation Technology
6. Digitalization

SOLID WASTE MANAGEMENT



1. Integrated Approach
2. Circularity (recycling)
3. Behavioral change
4. Policy Support
5. O&M and Partnership
6. Digitalization

INCLUSIVE URBAN PLANNING



1. Urban Planning
2. Policy Support
3. Urban Master Plan
4. Multi-sectoral Approach
5. Digitalization

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Water and Urban Development Emerging Area….





SUSTAINABLE TOURISM



SOCIAL AND AFFORDABLE HOUSING



MUNICIPAL/SUBNATIONAL FINANCE
SUB SOVEREIGN AND NON-SOVEREIGN FINANCING

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Water and Urban Development Sector Strategic approaches…

Support for balanced and resilient urban development (water supply, sanitation, circular economy, housing, tourism, transit-oriented development, pollution, disaster and climate resilience). Basic service delivery and capacity building for urban governance and strengthen the institutional readiness where needed.

Focus on integrated solutions and innovations: ADB facilitates integrated multi-sectoral solutions approach and harnessing technology and digital tools.

Leveraging regional and global partnerships: ADB facilitates partnerships to mobilize knowledge, finance, and innovation for sustainable urban development (e.g., via trust funds and technical assistance)

Expanding solutions through the private sector: Mobilizing private capital remains an important priority. Works closely with other ADB departments to develop enabling ecosystem and attract private capital for investments through viable projects and in line with the government priorities.

Capacity building and partnerships…

- Strengthening sector institutions through peer-to-peer learning

The Capacity-Building function focuses on strengthening institutional and technical competencies across the water and urban development sub-sectors.

- Leveraging strategic partnerships to build the next generation of sector leaders

  - Water Organizers' Partnerships for Resilience (WOP4R)
  - City-to-City Partnership Program (C2CP)
  - ADB Learning Weeks and Sector Trainings
  - Asia-Pacific Support for the Promotion of Resilience and Innovation in Environment Leadership (ASPIRE) for Women
  - Young Experts Program (YEP)
  - Urban and Water Sector Expert Pool

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ADB's Water and Urban Development Sector: Financing Partnership Facilities



UFPF
Urban Financing Partnership Facility

Established: 2009
Contributed: $247 million
Committed: $189 million (77%)
Focus:

Climate resilient cities, green, inclusive and competitive cities, smart cities, environmental pollution control, transport-oriented development, air quality management, community empowerment, integrated urban and regional planning.



WFPF
Water-Secure and Resilient Asia and the Pacific
WATER FINANCING PARTNERSHIP FACILITY

Established: 2006
Contributed: $170 million
Committed: $132 million (78%)
Focus:

Water security, food security, nature-based solution, digitalizing technologies, non-revenue water reduction, regulatory reform, private sector development

2026 Pipeline : Business Opportunities

SN.	Region	DMC	Project Name	Commitment Amount ($ million)
1.	Central and West Asia	PAK	Sustainable and Green Infrastructure Project	140.0
2.	Central and West Asia	GEO	Preparing the Urban and Coastal Resilience Project (SEFF Activity 3)	3.5
3.	Central and West Asia	ARM	Seismic Safety Improvement Program 3	293.0
4.	Central and West Asia	PAK	Preparing Urban and Water Projects in Sindh	15.0
5.	Pacific	VAN	Greater Port Vila Urban Resilience Project - Second Additional Financing	12.6
6.	Pacific	COO	Water security, Alternative energy, and Vital Ecosystems restoration (WAVE) Project	25.0
7.	Pacific	PNG	Urban Water Supply and Sanitation Security and Resilience Improvement Project	60.9
8.	Pacific	FSM	Preparing the Water Security and Resilience Improvement Project (PRF)	5.0
9.	Pacific	VAN	V-SET Activity 1: Transforming the Vanuatu Project Management Unit	2.5

ARM=Armenia, COO=Cook Islands, DMC=Developing Member Countries, GEO=Georgia, FSM=Federated States of Micronesia, PAK=Pakistan, PNG=Papua New Guinea, VAN=Vanuatu

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2026 Pipeline: Business Opportunities

SN.	Region	DMC	Project Name	Commitment Amount ($ million)
10.	South Asia	IND	Nagaland Urban Infrastructure Development Project	91.5
11.	South Asia	NEP	Integrated Water Supply and Sewerage Management (Sector) Project	115.0
12.	South Asia	BAN	Narayanganj Green and Resilient Urban Development Project	115.8
13.	South Asia	SRI	Water Supply and Sanitation Reform Program (Subprogram 2)	100.0
14.	South Asia	SRI	Climate-Resilient Sustainable Water Supply and Sanitation Project	200.0
15.	South Asia	IND	Urban Transformation and Investment Program	1000.0
16.	South Asia	BHU	Inclusive and Resilient Urban Development Project	10.0
17.	South Asia	IND	Chennai Climate Resilient Water Security and Sewerage Project	230.6
18.	South Asia	IND	Puducherry Integrated Urban Livability Improvement Project	144.5
19.	South Asia	BAN	Cluster Towns Water Supply and Sanitation Project	150.0
20.	Southeast Asia	CAM	Project Preparation Assistance Facility	15.0
21.	Southeast Asia	VIE	Ha Tinh City Priority Infrastructure for Climate Adaptation Project	96.2
22.	Southeast Asia	INO	Regional Water Supply Project	372.0
23.	Southeast Asia	LAO	Greater Mekong Subregion Smart and Sustainable Tourism Infrastructure for Inclusive Growth	30.0

BAN=Bangladesh, BHU=Bhutan, CAM=Cambodia, DMC=Developing Member Country, LAO=Lao People's Democratic Republic, IND=India, INO=Indonesia, NEP=Nepal, SRI=Sri Lanka, VIE=Viet Nam

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2027 Pipeline: Business Opportunities

SN.	Region	DMC	Project Name	Planned Amount ($ million)
1.	Central and West Asia	ARM	Yerevan Lake & Hrazdan Gorge Rejuvenation Project	40.0
2.	Central and West Asia	PAK	Preparing Urban Development Projects in Balochistan - PRF	15.0
3.	Central and West Asia	PAK	Preparing Urban and Water Projects including Greater Peshawar Water Supply and Urban Development in KPK	15.0
4.	Central and West Asia	GEO	Developing Resilient Infrastructure for Vibrant Economies (DRIVE)	200.0
5.	Central and West Asia	TAJ	Dushanbe Urban Water Resilience Project	38.0
6.	Central and West Asia	TAJ	Tourism Development Multisector Project	30.0
7.	Central and West Asia	TUR	Urban Resilience and Municipal Services Improvement Project	231.8
8.	Central and West Asia	UZB	Modernization of District Heating Systems in Navoiy, Tashkent, and Fergana Provinces	200.0
9.	Central and West Asia	UZB	Climate-Resilient Water and Sanitation Services Project (Phase 1)	221.9
10.	Central and West Asia	KGZ	Jalal-Abad Water Supply and Sanitation Development Program	40.0
11.	Central and West Asia	PAK	Sindh Transformational Accelerated Rural Water Supply, Sanitation and Hygiene Services Project Phase 1- FMRF	150.0
12.	South Asia	SRI	Water and Urban Project Support Lending (Activity 1)	15.0

ARM=Armenia, DMC=Development Member Country, GEO=Georgia, KGZ=Kyrgyz Republic, PAK=Pakistan, SRI=Sri Lanka, TAJ=Tajikistan, UZB=Uzbekistan VIE=Viet Nam

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2027 Pipeline: Business Opportunities

SN.	Region	DMC	Project Name	Planned Amount ($ million)
13.	South Asia	IND	Tripura Urban Livability Improvement Project	181.3
14.	South Asia	NEP	Kathmandu Valley Water Sector Reform Program (Subprogram 1)	50.0
15.	South Asia	IND	Rajasthan Urban Livability Improvement Investment Program (Tranche 1)	200.0
16.	South Asia	BAN	Dhaka Sewerage System Development Project	300.0
17.	South Asia	BAN	Coastal Towns Climate Resilient Water and Sanitation Project	150.0
18.	South Asia	IND	Assam Integrated Satellite Township Development Program (Tranche 1)	200.0
19.	Southeast Asia	CAM	Cambodia Plastic Reduction and Blue Economy Development Program	100.0
20.	Southeast Asia	VIE	Secondary Cities Environment Improvement Project - Dak Nong Province	43.0
21.	Southeast Asia	TIM	Resilient Urban Development Project	90.0
22.	Southeast Asia	VIE	Lao Cai Sustainable Urban and Infrastructure Development Project	75.0
23.	Southeast Asia	LAO	Resilient and Sustainable Urban Improvement Project	58.0
24.	Southeast Asia	CAM	Tourism Infrastructure for Inclusive and Resilient Growth Project	60.0
25.	Pacific	SAM, VAN	Circular Pacific via Regional Recycling Network	10.6
26.	Pacific	SAM	Water Security Improvement Project	16.0
27.	Pacific	PAL	Accelerated Infrastructure Project Preparation and Innovation Facility	5.0

BAN=Bangladesh, CAM=Cambodia, DMC=Developing Member Country, IND=India, NEP=Nepal, PAL=Palau, SAM=Samoa, VAN=Vanuatu

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IND: Chennai Integrated Urban Water Management Project

Financing Total: **$230** million
ADB (OCR): $230 million
Modality: Project loan

Climate Financing: **$101.1 million (39%)**
Adaptation: $70.0 million
Mitigation: $31.1 million

Target Population 2.6 million

Outcome

Access to safe, reliable, inclusive water supply and sanitation services improved.

Outputs

Output 1: Resilient Water and Wastewater Infra modernized.
Output 2: Efficient utility operations and inclusive service delivery.

Key Updates

1st Invitation For Bid started in Dec 25 and award expected in Sep 2026
2nd sewerage package to start in Sep 26.

Implementation Readiness Assessment

- Design-ready: Yes
- Procurement-ready: Yes
- Institutional Readiness: Yes
- Safeguards Readiness: Yes
- Financial Management Readiness: Yes

Innovations, Value Addition, and Key Lessons

- High project readiness.
- Integrated urban development and trenchless



IND: Puducherry Integrated Urban Livability Improvement Project

Financing Total: **$201.3 million**
ADB: $140.9 million
Modality: Project loan

Climate Financing: **$104.8 million (74%)**
Adaptation: $15.5 million
Mitigation: $89.3 million

Target Population more than 350,000 million

Outcome

Inclusive, reliable, and resilient urban service delivery improved, and institutional governance enhanced in Puducherry

Outputs

Output 1: Climate-resilient water supply and sanitation services enhanced. **Output 2:** Urban public spaces rejuvenated.
Output 3: Institutional capacity and financial sustainability strengthened.

Key Updates

Invitation for Bids (IFB) for advance packages started on 27 Feb 2026.
IFBs for more packages expected in Q4 2026 and 2027.

Implementation Readiness Assessment

- Design-ready: Yes
- Procurement-ready: Yes for 50% packages
- Institutional Readiness: Yes (Project Management Unit formed)
- Safeguards Readiness: Yes
- FM Readiness: Yes

Innovations, Value Addition, and Key Lessons

- High project readiness.
- Promote trenchless and digitalization in sewerage and water supply systems.
- Emphasis on service delivery and financial sustainability.



Performance-based NRW Contract in Fiji

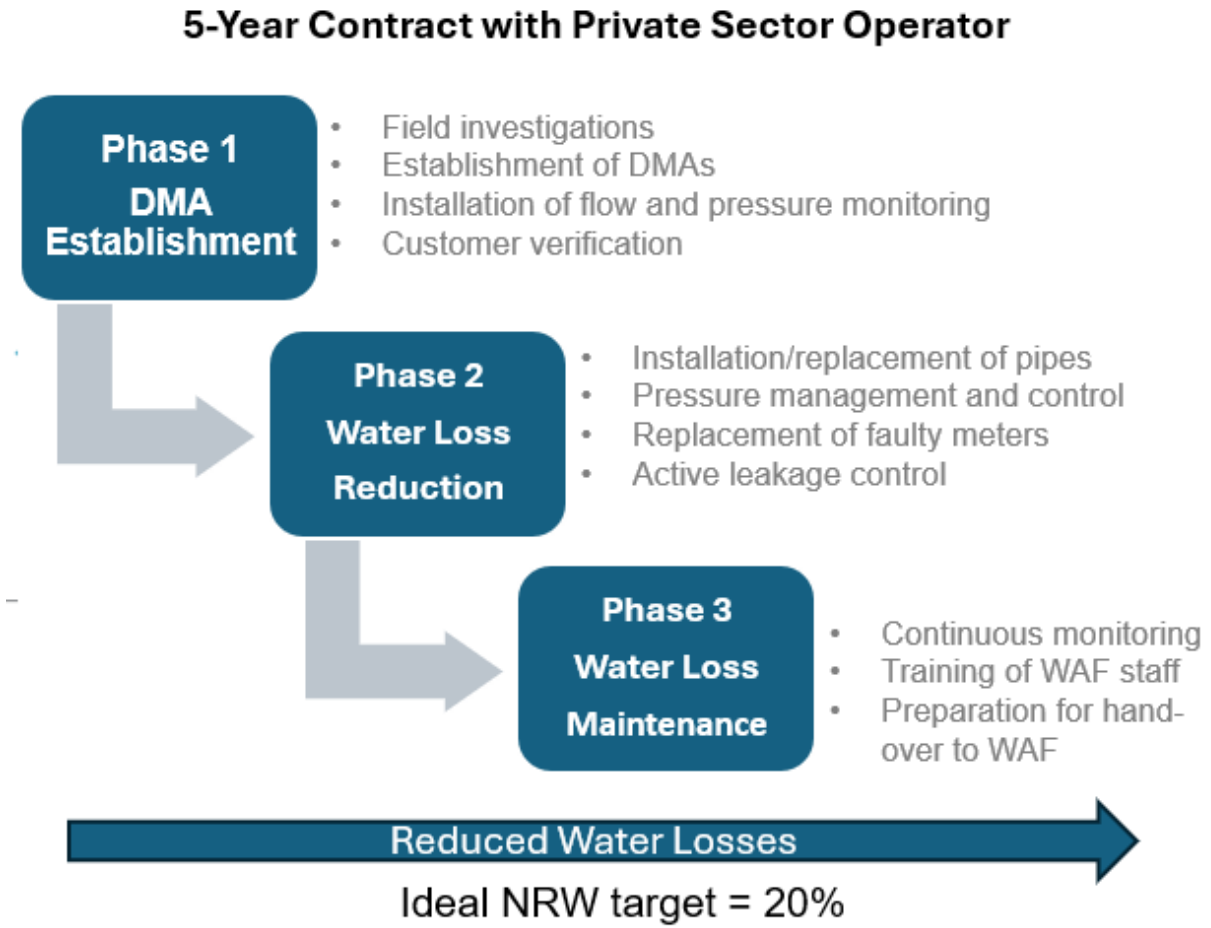


Sustainable Water Loss Reductions in the Greater Suva Area

- 5-year performance-based contract with experienced private operator
- Operator to develop improvement plan to bring non-revenue water down to around 20%
- After initial, ‘discovery’ phase, payments to contractor are 70% based on performance in reducing and maintaining non-revenue water levels

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Performance-based NRW Contract in Fiji



*NRW=Non-revenue water

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Key business opportunities with SD2, Water and Urban Development Sector Office?

Quality infrastructure :

- Services (project preparation, designs, implementation support)
- Technology, innovation, digitalization
- Advance engineering based on international best practices

Capacity support

Contact:
Sectors Department 2, Water & Urban Sector Development Cluster

- Laxmi Sharma, Unit Head, Project Administration
- Karl Galing, Urban Development Specialist