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Water and Urban Development Sector Portfolio

ITALIAN BUSINESS MISSION TO THE PHILIPPINES

5 October 2026

ADB | Sector Department 2

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



Water and Urban Development Sector

Vision, Impact, and Outcome

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

Water Sector Directional Guide

Impact

Advancing a Water Secure and Resilient Asia and the Pacific

Outcome

A. People and systems with strengthened resilience

B. Communities and marginalized groups with improved access to Water Supply and Sanitation (WSS) and raised incomes

C. More sustainable water, environments, improved water quality and efficient use of water resources

D. Effective and financially sustainable WSS and improved investor confidence

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

Urban Sector Directional Guide

Impact

Making Cities More Livable

Outcome

A. Improved coverage, quality efficiency, and reliability of services

B. Strengthened urban planning and financial sustainability of cities

C. Improved urban environment, climate resilience, and disaster management of cities

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

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

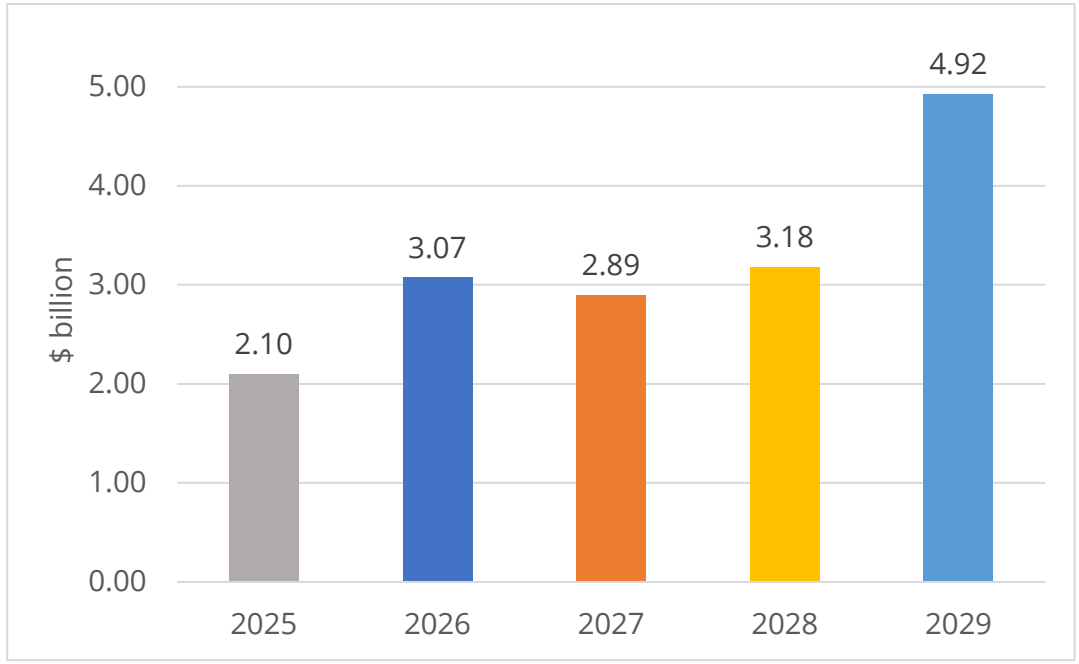
- Align national, city and utility priorities
- Strengthen policy, regulatory and institutional frameworks
- Governance, service and financing reforms, where needed

LOANS, GRANTS, TECHNICAL ASSISTANCE, PARTNERSHIPS

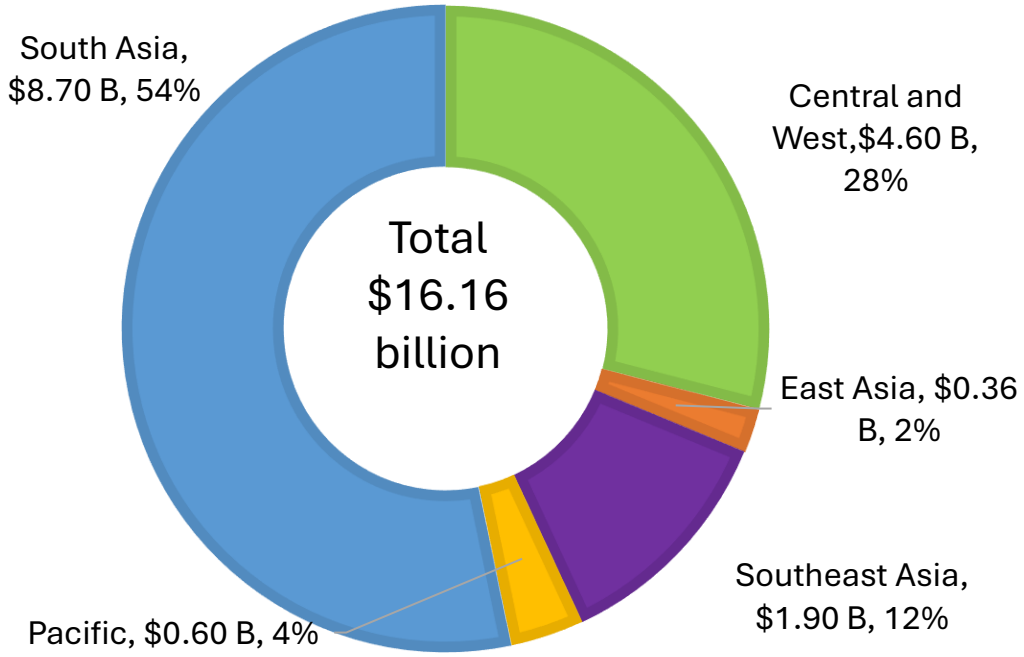
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How much we commit and where…

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



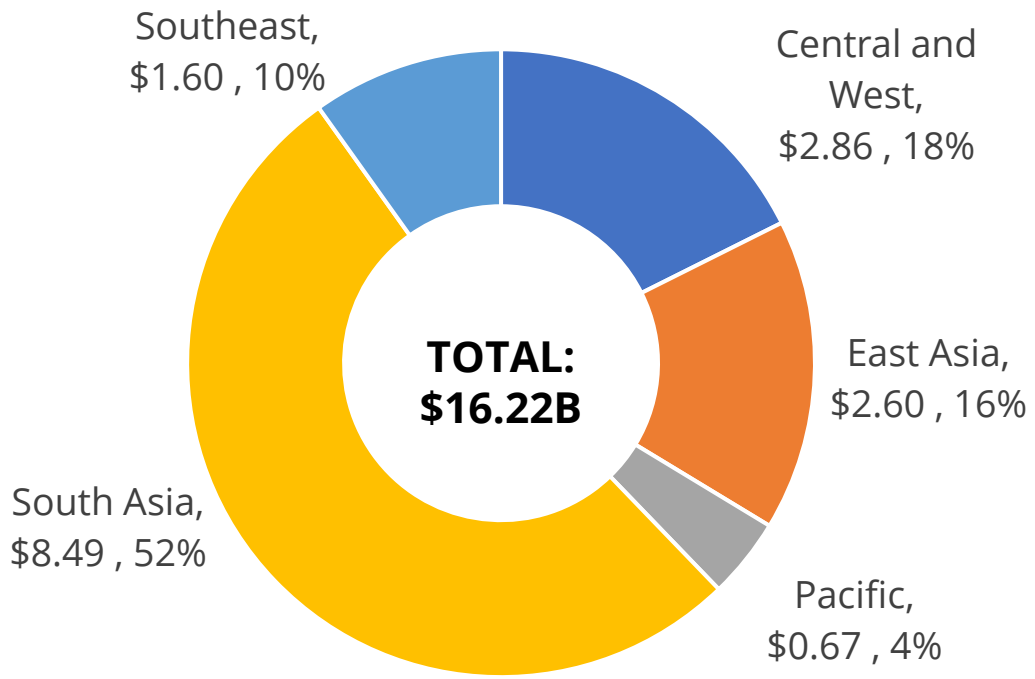
Project Finance Commitments by Region (2025-2029) ($ billion)



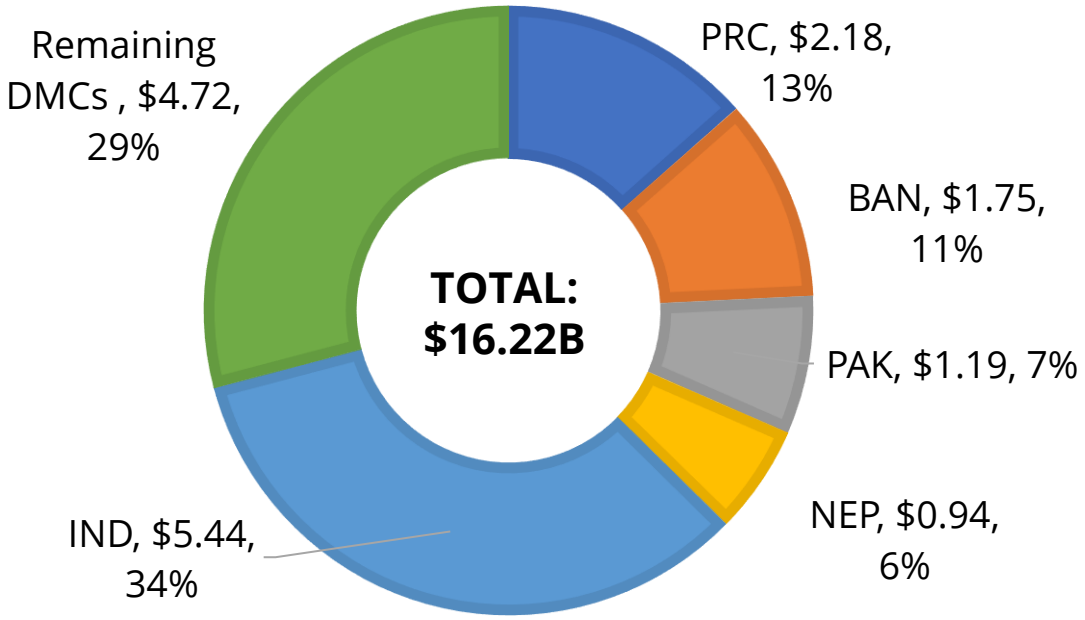
* Sovereign operation target. Data generated as of 31 July 2026.

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.

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Capacity building .....

- 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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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.



Water-Secure and Resilient Asia and the Pacific
WFPF
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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Nepal: Kathmandu Valley Integrated Solid Waste Management Project



ADB Loan: $100 million
Implementation Period: 2028–2033

Goal

Cleaner, healthier, and climate-resilient urban environments in the Kathmandu Valley through integrated solid waste management

Key Climate Change Adaptation Features

- Organics diversion, composting/anaerobic digestion and landfill gas management to cut GHG and open-burning emissions
- Climate-resilient Banchare Danda landfill: leachate treatment, stormwater control, odor management and safer access roads

Key Procurement Opportunity

- Material recovery facilities,
- Teku smart transfer station upgrade, composting/AD plants and collection fleet
- Digital SWM systems (MIS, GPS tracking, sensors) and
- advisory services for policy, PPP and master planning

Bangladesh: Dhaka Sewerage System Development Project



ADB Loan: $300 million
Implementation Period: 2027–2033

Goal

Improvement of climate-resilient and inclusive sanitation services in Rayerbazar catchment area and strengthening of DWASA operational performance in service delivery

Key Climate Change Adaptation Features

- Climate resilient infrastructure including treatment plant and pumping stations
- Anaerobic sludge digestion (under review)

Key Procurement Opportunity

- Large-scale design-build civil works in sewer pipeline network (4 packages), trunk main (one package) and design-build-operate 110 MLD treatment plant.
- Design Review and Project Management Consultancy Contract
- Public Awareness and Public Mobilization contract

India: Tripura Urban Livability Improvement Project



Goal

Improved urban livability and economic growth in Tripura through resilient urban service and enhanced tourism competitiveness

ADB Loan: $153.6 million
Implementation Period: 2027–2034

Key Climate Change Adaptation Features

- Climate-resilient stormwater drainage and flood pumping to reduce urban flooding and waterlogging.
- Resilient water supply systems with strengthened distribution networks, universal metering and SCADA to improve reliability and water-use efficiency.
- Expanded sewerage collection and conveyance to reduce GHG emissions from septic tanks and untreated wastewater.

Key Procurement Opportunity

- Civil Works – water supply (WTP, OHR, IRP, DTW), sewerage and stormwater drainage networks, pumping stations, and tourism facility rehabilitation
- O&M Services – performance-based operation and maintenance of water supply systems
- Advisory Services – tourism private sector engagement plan, tourism marketing and promotion strategy, utility assets management framework, contract management training, and municipal financing enhancement strategy

Featured Project: Indonesia: Regional Water Supply Project

- The project will expand access to safe, resilient and sustainable water supply services in five provinces:
  - ❑ Banten
  - ❑ East Kalimantan
  - ❑ Gorontalo
  - ❑ North Sumatra
  - ❑ North Sulawesi

- Scope of the project
  - ❑ Raw water intake facilities
  - ❑ Transmission lines
  - ❑ Treatment facilities
  - ❑ Distribution lines
  - ❑ Household connections



- Total project cost: $620 million
  - ❑ Civil works: 21 contracts
  - ❑ Consulting services: 6 contracts

Flagship Project: Regional: Circular Pacific Regional Recycling Network Project

Strengthening Capacities for the Circular Pacific via Regional Recycling Network

A regional recycling network can combine environmental outcomes with private sector participation.



$10.8 million ADF thematic RCI grant for approval in 2027 [concept stage].

1. **Collect & aggregate**
   Reliable feedstock across islands
2. **Process regionally**
   Scale facilities and standards
3. **Export competitively**
   Coordinated logistics and markets

REGIONAL INTEGRATION + PRIVATE CAPITAL

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Project Highlights & Upcoming Packages

A. L4582-UZB: Climate-Smart Water Management Improvement Project

➢ Impact

- Environment, health, and living conditions of the population enhanced

➢ Outcome

- Digital transformation to strengthen UJSC and suvtaminots' operation efficiency and climate resilience achieved

➢ Outputs

- Nationwide bulk metering program and asset inventory of water and wastewater infrastructure expanded
- Climate-smart water management system, data management centers, and customer centers operationalized
- UJSC and suvtaminots' management capacity improved

➢ Amount and Financing

- Total: $143 million (ABL Loan: $125 million, government: $18 million)

➢ Implementation Period

- Approved: 25 February 2025
- Loan closing: 30 June 2030

Package	Package Title	Est. Value ($ million)	Advertisement
Goods and Works			
CSWMP-DB-02	Design, Supply, and Installation of Bulk Metering and Telemetry Systems, Package 2	17.4	Q1 2027
CSWMP-DB-03	Design, Supply, and Installation of Bulk Metering and Telemetry Systems, Package 3	12.9	Q1 2027
CSWMP-IT-01	System Integrator Services for Design, Supply, Installation and Operationalization of IT climate-smart water management system	25.2	Q3 2027
CSWMP-IT-02	Financial Management Software System (Design, Installation, Operation/Training)	2.5	Q3 2027
CSWMP-NCS-01	External Audit of Consolidated UJSC Financial Statements	1.0	Q1 2027
Consulting Services			
CSWMP-CS-02	GIS/AMS Field Data Collection Surveys and Smart System Mapping, Package 1	9.2	Q3 2027
CSWMP-CS-03	GIS/AMS Field Data Collection Surveys and Smart System Mapping, Package 2	7.5	Q3 2027
CSWMP-CS-04	GIS/AMS Field Data Collection Surveys and Smart System Mapping, Package 3	10.0	Q3 2027
CSWMP-CS-05	Sector Financial Management Capacity Improvement	1.7	Q4 2026

Project Highlights & Upcoming Packages

B. (Proposed)UZB: Climate Resilient Water and Sanitation Services Project (Phase 1)

➢ Impact

- Environment, health, and living conditions in the Republic of Karakalpakstan and the provinces of Andijan enhanced

➢ Outcome

- Reliable, sustainable, and affordable water supply services in the Republic of Karakalpakstan and the province of Andijan improved and expanded

➢ Outputs

- Climate-resilient water supply infrastructure in the Republic of Karakalpakstan and the province of Andijan constructed or rehabilitated
- Operation and management of suvtaminots and inclusive water, sanitation, and hygiene (WASH) services in the Republic of Karakalpakstan and the Province of Andijan enhanced

➢ Amount and Financing

- Total: $220 million (ABL Loan: $200 million, government: $20 million)

➢ Implementation Period

- 5.5 years (Q2 2027 – Q4 2031)

Package	Package Title	Estimated Value ($)	Advertisement
Goods and Works			
CW-01	Design and Build of Kampyrravat Water Treatment Plant (WTP)	21.88	Q4 2026
CW-02	Design and Build of Tuyamuyun WTP	31.83	Q4 2026
CW-03	Construction of 36 km Ø1,400 mm steel pipe bulk water transmission line	36.00	Q4 2027
CW-04	Lot 1: Construction of steel pipes from Jalaquduq district center to Andijan city (25.5 km)	21.45	Q4 2027
CW-04	Lot 2: Construction of steel pipes from Andijan city to Asaka, Andijan north and New Andijan city (47 km)	19.37	Q4 2027
CW-05	Construction of laboratory, dispatching center, and administrative building for Andijan Suvtaminot	1.00	Q4 2027
CW-06	Construction of 96.5 km new Ø 500 mm steel pressure main line from Kungrad WDC to Muynak WDC	24.13	Q3 2027
CW-07	Non-Revenue Water Program and District Metered Areas (DMA) Operation and Maintenance	2.50	Q3 2027
CW-08	Reconstruction of Andijan city sewerage collectors (16.62 km)	16.22	Q4 2026
G-01	Water Supply Maintenance equipment	1.00	Q3 2027
Consulting Services			
CS-01	Project Management and Construction Supervision (PMCS) Consultancy	3.76	Q4 2026
CS-02	Advancing Climate-Resilient Smart Water Management Systems	2.42	Q2 2027
CS-04	Detailed Engineering Design Consultancy	4.50	Q4 2026

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

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