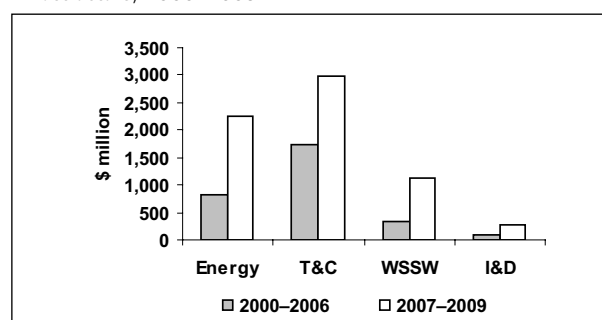


# X

## The 2007–2009 Pipeline

Reflecting these initiatives, there are several significant changes in the medium-term pipeline of ADB projects (Appendix tables 6.1–6.5).<sup>38</sup> First, the level and proportion of lending for infrastructure will rise sharply. Second, there are several notable changes in the sectoral distribution of programmed lending. The average annual lending for infrastructure is programmed to rise from \$3.0 billion during 2000–2006 to \$6.6 billion during 2007–2009. This includes a sharp rise to \$7.4 billion planned in 2009, which partly reflects the cumulative effect of loans from the Multitranchise Financing Facility approved during preceding years, all of which may not materialize fully given that this new modality is being pilot tested. Compared to 2000–2006, the average lending per annum is expected to rise across all sectors during 2007–2009 (Figure 31 and Appendix table 6.1). Further, the proportion of total infrastructure lending for energy will rise from 27.4% in 2000–2006 to 33.7% in 2007–2009; WSSW management from 11.4% to 17.0%; and irrigation and drainage from 2.7% to 4.2%; while that for transport and communications sector will fall from 58.5% to 45.1%. In particular, the proportion of lending for WSSW management is programmed to rise significantly. The proportion of ADF in total infrastructure lending is programmed to fall slightly, from 14.1% in 2000–2006 to 13.7% in 2007–2009. If the entire programmed rise in lending for infrastructure materializes despite the declining overall concessionality of ADB’s lending for the infrastructure sectors, it will be a commendable achievement.

**Figure 31:** ADB’s Average per Annum Public Sector Lending in Infrastructure, 2000–2009



I&D = irrigation and drainage; T&C = transport and communications; WSSW = water supply, sanitation, and waste management.  
Sources: ADB internal database on Loan, TA, Grant, and Equity Approvals; and Project Processing Information System (PPIS) as of 8 December 2006.

**Energy.** The 2007–2009 program shows a significant rise in lending for the energy sector, with average per annum lending above \$2 billion compared with \$810.6 million during 2000–2006. Further, the program shows a rising trend throughout this period, which partly reflects the cumulative effect of previously approved multitranchise financing facilities. The rise is accompanied by some clear changes in the subsectoral composition of lending (Figure 32 and Appendix table 6.2). Compared with 2000–2006, there is a notable rise in generation to about a quarter of the total programmed lending in the energy sector during 2007–2009. This includes a significant rise in the proportion of hydropower generation, from 0.8% to 13.5%, reflecting ADB’s increasing emphasis on clean energy. The proportion of energy sector development also rises to constitute almost 70% of the total programmed lending in the energy sector. However, the proportion of lending for transmission and distribution falls sharply.

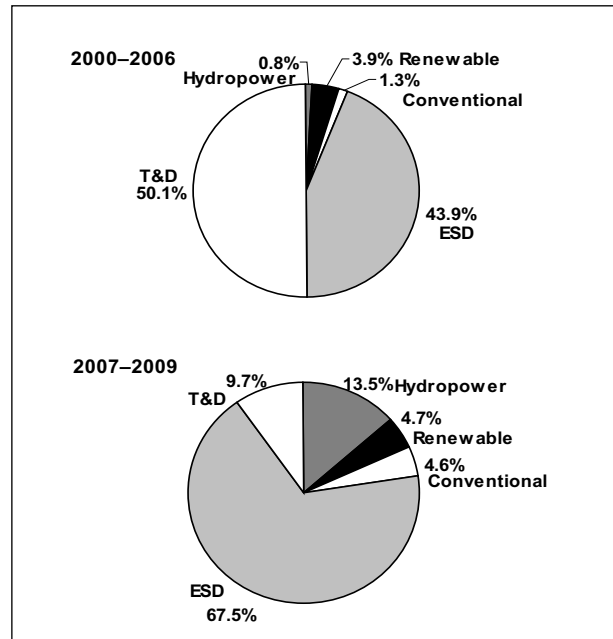
**Transport and communications.** Lending in this sector is programmed to rise sharply from about \$1.7 billion per annum during 2000–2006 to about \$3 billion during 2007–2009. Reflecting the cumulative effect of multitranche financing facilities, this will also show a rising trend throughout the 2007–2009 period. The subsectoral composition will not change much except for some rise in multimodal transport and sector development, from 0.3% to 7.6%, and a slight fall in roads and highways, from 79.3% to 74.9%, and in railways, from 19.5% to 15.2% (Figure 33 and Appendix table 6.3). The proportion of ADF in the total lending to the transport sector is programmed to fall from 12.1% during 2000–2006 to 10.6% during 2007–2009.

**Water supply, sanitation, and waste management.**

Lending in this sector is to rise sharply from about \$0.3 billion per annum during 2000–2006 to \$1.1 billion during 2007–2009. Continuing the recent trend, integrated subsector projects are to rise, from 48.1% to 55.7% of total lending for WSSW, along with a slight rebound for water supply and sanitation subsector, from 34.0% to 39.9%. On the other hand, lending in waste management subsector will continue to decline (Figure 34 and Appendix table 6.4).

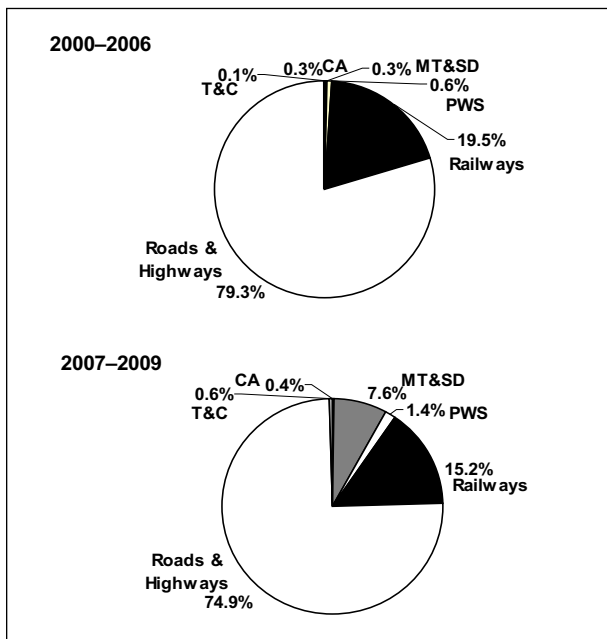
**Irrigation and drainage.** Lending for irrigation and drainage will rise sharply from an insignificant \$79 million average per annum during 2000–2006 to a notable \$282 million average per annum during 2007–2009 (Appendix table 6.5).

**Figure 32:** ADB Public Sector Lending in Energy by Subsector Share, 2000–2009



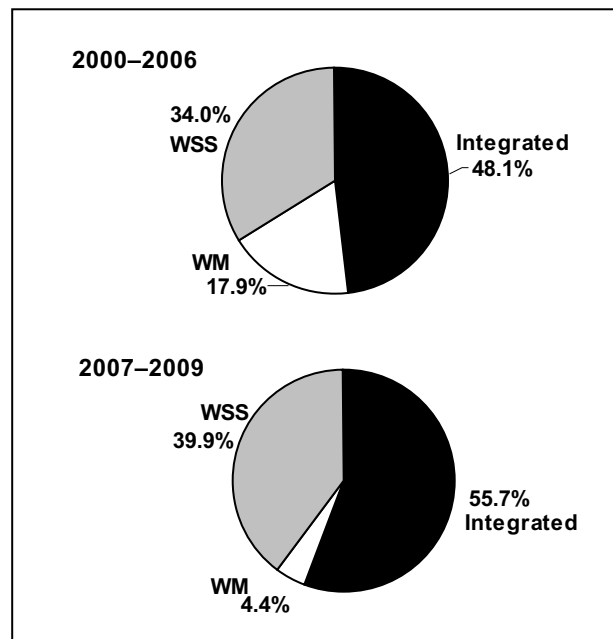
ESD = energy sector development; T&D = transmission and distribution. Sources: ADB internal database on Loan, TA, Grant, and Equity Approvals; and Project Processing Information System (PPIS) as of 8 December 2006.

**Figure 33:** ADB Public Sector Lending in Transport and Communications by Subsector Share, 2000–2009



CA = civil aviation; MT&SD = multimodal transport and sector development; PWS = ports, waterways, and shipping; T&C = telecommunications and communications. Sources: ADB internal database on Loan, TA, Grant, and Equity Approvals; and Project Processing Information System (PPIS) as of 8 December 2006.

**Figure 34:** ADB Public Sector Lending in Water Supply, Sanitation, and Waste Management by Subsector Share, 2000–2009



WM = waste management; WSS = water supply and sanitation. Sources: ADB internal database on Loan, TA, Grant, and Equity Approvals; and Project Processing Information System (PPIS) as of 8 December 2006.