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中国国别项目组合评价：核心发现、结论与建议

Country Portfolio Evaluation (CPE) for China: Key Findings, Conclusions and Recommendations

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评价背景、目标与范围

Evaluation Background, Objectives and Scope

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首份中国国别项目组合评价 助力下一阶段合作优化

Inaugural Country Portfolio Evaluation (CPE) for China · Systematic Review for Future Partnership

目标一：评估过往合作成果

Objective 1: Results Assessment

对2015–2024年对华合作的整体成效开展独立、循证的系统回顾。

Independent, evidence-based review of China-NDB 2015–2024 partnership outcomes.

目标二：总结分享经验教训

Objective 2: Learning & Replication

提炼成功经验、梳理共性短板，为新开行在其他成员国的业务设计与实施提供参考。

Good practices & lessons for cross-country replication.

目标三：未来战略输入

Objective 3: Strategic Input

为新开行与中国下一个“金色十年”合作及在华业务拓展提供依据。

Inform the next “Golden Decade” of NDB-China partnership and future business expansion.

评价范围：截至 2024 年底已获批的贷款项目及组合，及新开发银行在华非贷款活动。

Scope: Covers all 27 lending projects and four pillars of non-lending activities as of end-2024.



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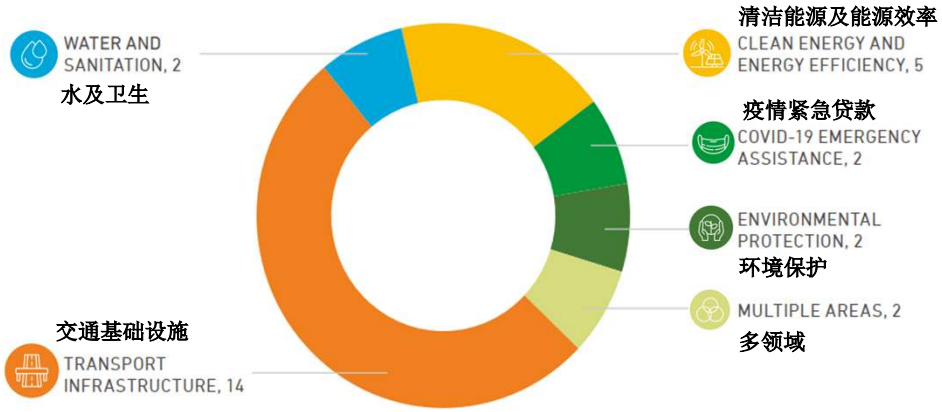
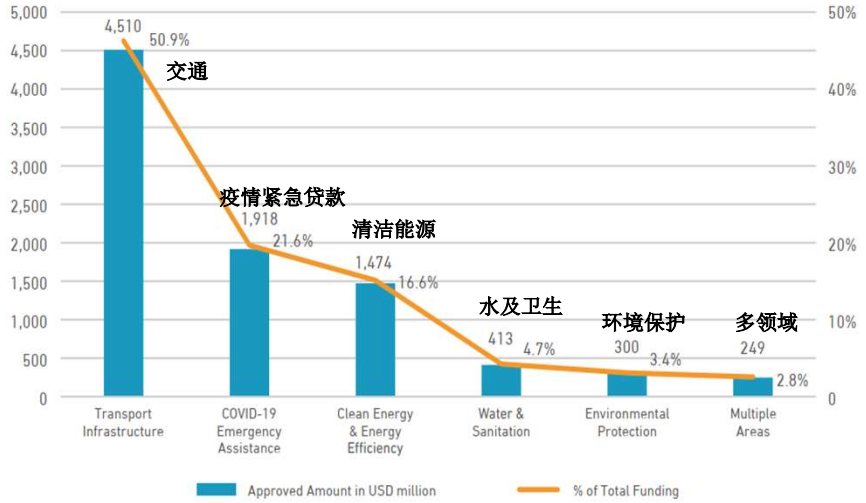
新开发银行在华贷款项目领域分布（2016 -2024）

Overview of NDB Lending Operations in China

- 截至 2024 年底，中国累计获批 27 个项目（不含 2 个已取消项目，新开行承诺贷款总额 88.6 亿美元，其中已拨付 63.4 亿美元。
- 24 个为主权贷款项目，非主权业务于 2023 年正式启动。
- 分领域结构：
  - 14 个项目支持交通基础设施建设，承诺融资额 45 亿美元，占贷款总规模的 50% 以上；
  - 5 个项目助力清洁能源领域低碳转型，贷款金额 14.7亿美元；
  - 2 个新冠肺炎疫情紧急援助项目，合计贷款 19.2 亿美元；
  - 其余项目分布于水及卫生、环境保护、多领域合作等领域。

- By the end of 2024, 27 active operations approved with a total lending commitment of USD 8.86 billion, USD 6.34 billion been disbursed.
- 24 of them are sovereign lending operations, while non-sovereign projects were officially launched in 2023.
- Out of the 27 projects:
  - 14 loans support transport infrastructure amounting to USD 4.5 billion (over 50% of the portfolio's lending value);
  - 5 projects for clean and renewable energy (USD 1.47 billion);
  - USD 1.92 billion allocated to COVID-19 emergency loans.





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中国贷款项目地理和货币分布及执行状态 （截至2024年年底）

Overview of NDB Lending Operations in China

- 截至 2024 年底，新开行在华贷款项目覆盖全国约 50% 省级行政区。其中 4 个为全国性项目，其余 23 个分布于 17 个省级行政区（12 省、3 自治区、2 直辖市）。
- 人民币贷款占在华获批贷款总额的约69%；从2023年开始，新开行成为熊猫债市场最大发行主体。
- 27 个项目整体拨付率达 71.6%，其中13个项目已全额拨付或关账；74.1% 的项目拨付进度超 50%，55.6% 超 80%。

- By end-2024, NDB's China portfolio covered around **50%** of provincial-level regions. Excluding 4 nationwide loans, 23 projects spanned 17 provincial regions (12 provinces, 3 autonomous regions, 2 municipalities).
- CNY loans account for **69%** of total approved lending.
- Overall disbursement rate of the 27 projects reaches **71.6%**. **13** projects are fully disbursed; **74.1%** of projects have **>50%** disbursement, and **55.6%** exceed **80%**.

对华贷款项目地理分布

PROVINCIAL DISTRIBUTION OF PROJECTS IN CHINA (AS AT END 2024)

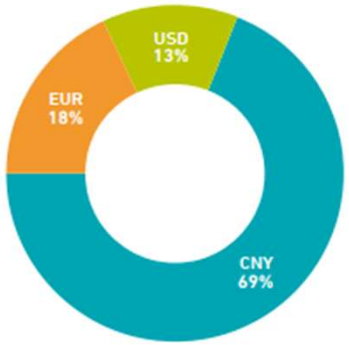
KEY AREAS FINANCED	NO. OF PROJECTS	PROVINCE-LEVEL DIVISIONS
	2	Anhui, Gansu, Hubei
	2	Guangxi
	2	Zhejiang
	2	Jiangxi
	1	Guizhou, Henan, Inner Mongolia Ningxia, Shandong, Shannxi
	1	Beijing, Fujian, Guangdong, Shanghai
	1	Liaoning

Note: Four operations are nationwide, including two COVID-19 emergency loans.
注：4 个项目为全国性项目，含 2 笔新冠肺炎应急贷款。

对华贷款项目的货币组成

Distribution of NDB China portfolio by loan currency

Loan currency		Amount in USD (million)	Percentage
CNY	人民币	6,096	68.6%
EUR	欧元	1,569	17.7%
USD	美元	1,200	13.5%
Total		**8,865**	**100%**



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新开发银行在华合作伙伴关系发展

NDB's Partnership Development in China

截至 2024 年底，新开发银行已签署 38 份谅解备忘录，与各类机构建立合作伙伴关系；其中 13 份与在华总部机构签署，包括 1 家同类多边开发银行、2 家其他多边机构、5 家商业银行、3 家国有政策性银行及 2 家学术机构。

The NDB has signed 38 memoranda of understanding (MOUs) to establish cooperative partnerships with a wide range of institutions. Thirteen MOUs have been entered into with China-headquartered institutions, including one peer MDB, two other multilateral institutions, five commercial banks, three state-owned policy banks and two academic institutions.

ICBC 中国工商银行
中国农业银行 AGRICULTURAL BANK OF CHINA
中国银行 BANK OF CHINA
中国建设银行 China Construction Bank
国家开发银行 CHINA DEVELOPMENT BANK
中国进出口银行 THE EXPORT-IMPORT BANK OF CHINA
中国农业发展银行 AGRICULTURAL DEVELOPMENT BANK OF CHINA
交通银行 BANK OF COMMUNICATIONS
AIIB
MCDF MULTILATERAL COOPERATION CENTER FOR DEVELOPMENT FINANCE
BPI BRICS PartNIR Innovation Center 金砖国家新工业革命伙伴关系创新基地
AFDI 亚太财经与发展学院 ASIA-PACIFIC FINANCE AND DEVELOPMENT INSTITUTE
SHANGHAI UNIVERSITY OF FINANCE & ECONOMICS 1917

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评价方法与流程

Evaluation Methodology and Process

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遵循国际标准，结合业务实际，七阶段严谨推进

International Standards + Business Practice | Rigorous Seven-Phase Delivery

评价框架 Evaluation Framework

- 遵循多边开发银行评价协作组国际标准，契合 NDB 评价政策与手册。
  Aligned with ECG international standards and NDB evaluation policies & manuals.
- 贷款项目：**相关性、有效性、效率、影响力、可持续性**；定制化评价方法，以完工或已关账项目为主。
  Lending operations: Relevance, Effectiveness, Efficiency, Impact, Sustainability. Customized evaluation methodology, focused primarily on completed projects.
- 非借贷活动：**技术援助、能力建设、研究与知识分享、伙伴关系**
  Non-lending activities: Technical assistance, capacity building, research & knowledge sharing, partnerships.
- 另设 **NDB 机构履职**与**借款方履职**专项评价
  Dedicated assessment of NDB & Borrower's institutional performance.

评价流程 Evaluation Process

1. (1) **编制评价方案** Evaluation Approach Paper
2. (2) **启动研讨会** Inception Workshop
3. (3) **案头审阅与数据核验** Desktop review & Data Verification
4. (4) **实地调研与访谈** Field Missions & Stakeholder Interviews
5. (5) **中期报告** Interim Report & Discussions
6. (6) **终稿 + 外部同行评审** Final report & peer review
7. (7) **董事会讨论及报告发布** NDB BoD Review & Report Dissemination



评分系统 Rating system and scale

Table 1. IEO rating scale

Score	Rating	Description
6	Highly successful	The activity (project, programme, non-lending, etc.) achieved or surpassed all (indicatively, over 95%) of the main targets, objectives, expectations and results and could be considered as a model within its project typology.
5	Successful	The activity achieved almost all (indicatively, between 80–95%) of the main targets, objectives, expectations and results.
4	Moderately successful	The activity achieved the majority (indicatively, between 60–80%) of the main targets, objectives, expectations and results. However, a significant part of these was not achieved.
3	Moderately unsuccessful	The activity did not achieve most (indicatively, less than 60%) of the main targets, objectives, expectations and results.
2	Unsuccessful	The activity achieved only a minority (indicatively, less than 50%) of the main targets, objectives, expectations and results.
1	Highly unsuccessful	The activity achieved almost none (indicatively, less than 20%) of the main targets, objectives, expectations and results.

*IEO Evaluation Manual (2024)

6	非常成功	实现或超越了几乎所有目标（超过95%），在各领域均可被视为其项目类型的典范
5	成功	实现了绝大部分目标（约在80%至95%之间）
4	中等成功	实现了大部分目标（大约在60%至80%之间）
3	中等不成功	未实现多数目标（约少于60%）
2	不成功	仅实现少部分目标（约少于50%）
1	非常不成功	几乎未实现目标（少于20%）

*《新开发银行评价指南手册 2024年版》

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贷款项目组合表现

Performance of the Lending Operations



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贷款项目组合整体评级5分 —「成功」，五维度全面达标

Lending portfolio rated 5 ("Successful") — strong performance across all five evaluation criteria

评价维度 Dimension	评级 Rating	核心判断 Key Assessment
相关性 Relevance	5	高度契合中国发展规划与NDB战略宗旨，本币融资领先 Strong alignment with China's development plans and the NDB's mandate.
有效性 Effectiveness	5	多数项目产出与发展目标较好达成 Project outputs and development targets largely well achieved.
效率 Efficiency	5	审批与放款效率（71.6%已完成）全球成员国中领先 Leading approval and disbursement efficiency across members.
影响力 Impact	5	绿色低碳发展带来的环境与社会效益较为明显 Noticeable green, low-carbon and social benefits.
可持续性 Sustainability	5	机构、财务与环境可持续性良好，长期运营具备韧性 Sound institutional, financial and environmental sustainability with resilient long-term operations.

综合评级 Overall: 5 / 6（**成功** Successful）——在华项目是NDB成立以来体量最大、执行效率最高的国别组合。

China country portfolio is one of the NDB's largest and boasts the highest implementation efficiency since the Bank's inception.



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相关性 • RELEVANCE | 评级 5 分（Successful）

战略高度契合国家发展规划，本币融资为核心亮点

Strong strategic alignment; local currency financing as key strength

战略契合 Strategic Alignment

紧密对接十三五、十四五规划、双碳目标与区域协调发展战略；对标 SDG 7、9、11

Aligned with 13th/14th FYPs, dual carbon goals & regional development strategies Mapped to SDGs 7, 9 & 11.

包容性投向 Inclusive Lending Focus

超 70% 贷款投向中西部、内陆及欠发达地区，助力区域均衡增长

Over **70%** of loans to less developed regions. Supporting balanced & inclusive growth.

本币融资 Local Currency Financing

68.8%

人民币贷款占比为成员国及MDB最高；熊猫债累计发行 555 亿元（全球领先）

Highest RMB loan share among NDB members & peer MDBs. **RMB 55.5bn** Panda Bonds by 2024 – world's largest issuer.

项目设计亮点 Key Design Strengths

多数项目因地制宜、融合前沿技术，嵌入严格 ESG 标准，例如铜陵公铁大桥配套江豚栖息地保护方案

Most projects tailored to local conditions, with cutting-edge technologies & rigorous ESG safeguards.

待优化方向 Areas for Improvement

少量早期项目需求预测偏乐观、设计与监测框架待完善；新开行的金融工具仍以传统贷款为主

Optimistic demand forecasts for a few early projects; DMFs need refinement. Financial instruments dominated by traditional loans.



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有效性 · EFFECTIVENESS | **评级 5 分** （Successful）

多数项目产出与发展目标完成度良好

Most project outputs & development targets largely met

清洁能源：标杆表现 Strong Performance of Clean Energy

发电量、碳减排超预期；专利技术全行业推广；海上风电成交付标杆

Power generation & carbon cuts exceed expectations; patented technologies scaled industry-wide; offshore wind an exemplary benchmark.

城市交通与生态民生 Urban Transport, Environment & Livelihoods

轨交提升公交分担率；水务项目减排治污，扩大欠发达地区饮水覆盖

Rail transit lifts public transit modal share; water & environmental projects cut emissions & pollution and expand safe water access in less developed regions.

疫情应急响应：快速精准 Swift & Targeted Pandemic Response

140 亿元应急贷款及时拨付，支持医建与疫后复苏，带动就业

RMB 14bn emergency loans disbursed promptly; support health infrastructure, post-pandemic recovery & job creation.

待改进领域 Areas for Improvement

个别交通、能源及水务项目未充分达成绩效目标；部分设施资产利用率偏低

Few transport, energy & water projects miss full targets; low asset utilization at some facilities.





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新开行全球最高执行效率，审批周期低于均值

Fastest approval & disbursement among NDB members

71.6%

目放款率 NDB 全球最高，占总放款 30% 以上

Highest disbursement rate across NDB; over 30% of total disbursements.

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审批至贷款签署（天）；至生效仅 217 天，远低于全球均值

Days from Board approval to signing; 217 days to effectiveness, well below global avg.

10%+

80% 参评项目经设计优化与国产化实现两位数成本节约

80% of projects optimized via design & localization; over 10% cost savings.





效率提升的待优化领域 Areas for Efficiency Improvement

- 币种转换工具不足，少量美元 / 欧元贷款存汇率风险，拉低资金利用率
  Limited currency tools; FX risk on small USD/EUR loans reduces capital utilization.
- NDB 早期内部架构调整，项目人员轮岗频繁，影响部分项目衔接
  Early restructuring & frequent staff rotation disrupt project handover.
- 面向借款人和项目执行单位的数字化放款系统仍待上线
  Digital disbursement system for borrowers & implementers pending launch.

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影响力 & 可持续性 • IMPACT & SUSTAINABILITY | 均 5 分 （Successful）

外部性显著、长期运营稳健

Strong externalities & robust long-term operation

影响力：四大维度综合效益

环境层面
Environmental

年减排数百万吨 CO_2，修复生态、改善空气水质
Million-ton annual CO_2 cuts; restored ecosystems; cleaner air & water.

经济层面
Economic

经济倍增效应，培育海上风电产业集群、带动大量就业
Multiplier effect; offshore wind clusters; large-scale job creation.

社会层面
Social

保障农村及少数民族地区均等获取公共服务，增进社会凝聚
Equal access in rural/minority areas; stronger social cohesion.

技术层面
Technical

全自动轨道交通、抗台风海上风电等树立全球标杆，技术实现国际推广
Automated rail & typhoon-resistant offshore wind set global benchmarks; tech scaled globally.

可持续性：长期运营韧性

运营韧性 Operational Resilience

清洁能源项目高运转率与稳定财务收益；城市公益设施依托长效财政补贴
High utilization & stable returns for clean energy; urban public facilities backed by sustainable subsidies.

环境可持续 Environmental Sustainability

气候适应设计与生物多样性保护措施均高于法定标准
Climate-adaptive design & biodiversity safeguards exceed legal standards.

社会可持续 Social Sustainability

普惠化设计、就业安置与社区参与机制夯实社会基础
Inclusive design, jobs & community participation strengthen social foundations.

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非借贷活动表现

Performance of the Non-Lending Activities



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整体「比较成功」：四大支柱均有进展

Overall “Moderately Successful”: Progress across all four pillars

领域 Areas	评级 Rating	核心发现 Key Findings
技术援助 (TA) Technical Assistance	4	聚焦标杆项目，尚未形成系统化体系，PPF 未在华使用 Flagship project focus; no systematic framework; PPF not used in China
能力建设 Capacity Building	4 to 5	2022 年后成效显著，延伸至非主权借款机构 Strong results since 2022; extended to non-sovereign borrowers
研究与知识分享 Research & Knowledge Sharing	4	南南合作、知识转移初现成效，内部研究力量相对薄弱 Progress South-South knowledge transfer; limited in-house research capacity
伙伴关系建设 Partnership Development	4	13 份 MOU，20% 未落地，同业联合融资偏少 13 MOUs signed; 20% not implemented; limited peer MDB co-financing

待提升领域: 非借贷活动尚未形成统一制度框架，资源投入有待提升，内部专业人员储备需加强。

Areas for improvement: No unified institutional framework for non-lending activities; insufficient resource input and in-house expertise.



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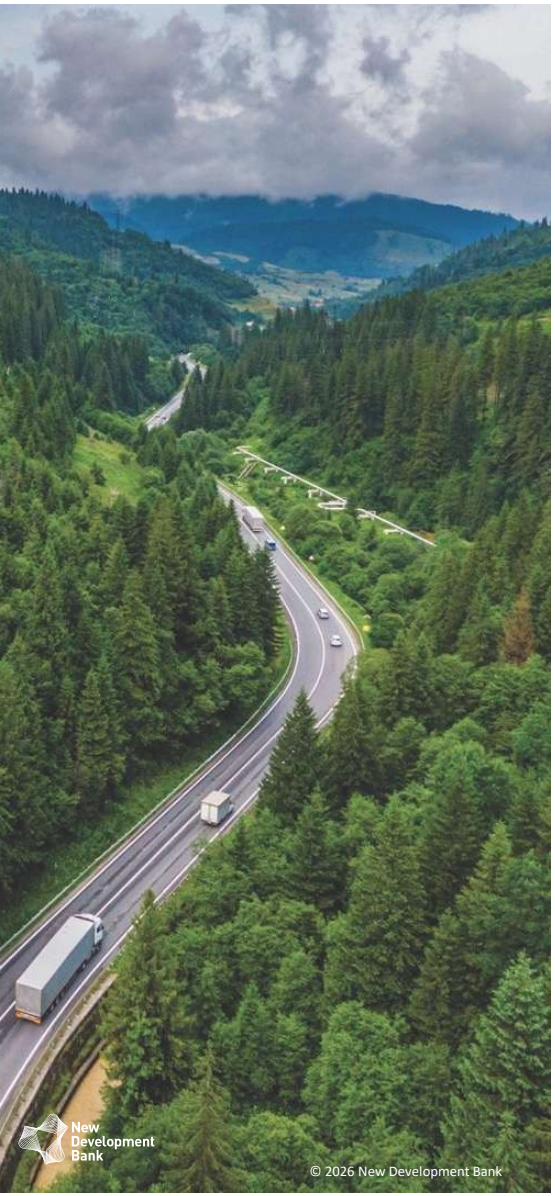

关键案例：精准支持标杆项目，构建合作生态

Key Cases: Targeted support for flagship projects & cooperation ecosystem

技术援助 · 精准破解关键瓶颈

- 北京燃气天津南港 LNG 应急储备：气候风险专项 TA
- 莆田平海湾海上风电：技术尽调助推行业标准形成
- 铜陵公铁大桥：长江江豚生物多样性保护支持

TA: Targeted Bottleneck Solutions

- Beijing Gas LNG Emergency Storage: Climate Risk TA
- Offshore Wind: Technical DD advances industry standards
- Tongling Bridge: Yangtze Finless Porpoise biodiversity support

能力建设 · 延伸至非主权借款机构

- 为项目单位提供 ESG、可持续采购、项目合规培训
- 湖州银行、海通恒信：支持中资金融机构搭建绿色金融风控体系

Capacity Building: Extended to Private Sector

- ESG, sustainable procurement & compliance training
- BoH & Haitong: green finance risk framework support

研究与知识分享 · 旗舰合作与南南转移

- 连续3年联合编制博鳌亚洲论坛旗舰报告
- 中国基础设施良好实践向巴西、南非等新兴市场南南转移

Research & Knowledge Sharing: Flagship Cooperation & South-South Transfer

- Co-authored flagship report with Boao Forum for Asia (2022-24)
- China infra good practices to Brazil, South Africa & emerging markets

伙伴关系 · 13 份 MOU 构建合作生态

- NDB–中国银行：绿色金融与跨境人民币合作
- NDB–中国对外承包工程商会：对接企业实体投标合作

Partnerships: 13 MOUs for Cooperation Ecosystem

- NDB-BOC: green finance & cross-border RMB cooperation
- NDB-CHINCA: private sector collaboration facilitation



5

新开行和借款人表现

Performance of the NDB and Borrower

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Borrower Performance Rated "Successful", NDB Performance Scores Between 4 and 5

新开行履职表现（介于4-5之间） NDB Performance (Between 4–5)

核心优势 Core Strengths

- 本币融资领域全球领先 Global leadership in local currency financing.
- 审批流程高效精简 Efficient and streamlined approval processes.
- 全球首个为中国提供主权抗疫融资的国际金融组织
  The first MDB globally to provide sovereign pandemic financing to China.
- 2021 年设立中国业务部，保障监管质量与合规
  China Desk launched in 2021 for robust supervision and compliance.

可进一步提升空间 Areas for Improvement

- **开发金融产品与工具有限** Limited financial products and instruments.
- **早期组织调整导致人员频繁变动**
  Frequent personnel turnover from early organizational restructuring.
- **项目的财务经济评价方法与 M&E 框架待完善**
  Financial evaluation and M&E framework require improvement.

借款方履职（5分，成功）Borrower Performance (Successful)

核心优势 Core Strengths

- 多层级协同机制完善，执行力强
  Robust multi-level coordination and strong execution.
- 历年国家审计未发现NDB贷款资金使用重大违规
  No major NDB loan irregularities in successive national audits.
- 多数项目提前竣工，实现大额成本节约
  Most projects completed ahead of schedule with significant cost savings.
- 研发多项国际领先技术，主动推进南南经验交流
  Developed world-leading technologies & advanced South-South knowledge sharing.

可进一步提升空间 Areas for Improvement

- **首次合作机构对 NDB 流程尚不熟悉**
  First-time partners unfamiliar with NDB procedures.
- **少数项目前期设计阶段的需求预测过于乐观**
  Overly optimistic demand forecasts for a few preparatory-stage projects.

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总体合作评价
Rating of the Overall Partnership



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中国—NDB 整体合作评级：「成功」（5 分）

China–NDB Overall Partnership Rating: "Successful" (Score: 5/6)

合作定位

- 高影响共赢伙伴，表现超 NDB 全球平均水平
- 借贷为高效可持续基建融资标杆

Partnership Positioning

- High-impact win-win partnership; above NDB average
- Lending operations serve as a model for efficient, sustainable infrastructure financing.

三大核心优势

1. 借贷业务：高效可持续基建融资典范
2. 本币融资与技术创新：核心竞争优势
3. 中方借款人高效履职：合作成功基石

Three Core Strengths

1. Lending: model for efficient sustainable infra financing
2. Local currency & tech innovation: core competitiveness
3. Strong borrower delivery: cooperation cornerstone

可提升空间

- 非贷业务受资源限制，潜力待释放
- 尚未制定国别合作战略；金融工具相对单一
- 中国业务部资源相对有限，制约规模化交付

Areas for Improvement

- Non-lending: resource-constrained, untapped potential
- No country strategy; limited financial instruments
- Insufficient China Desk resources limits scaled delivery

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核心结论

Key Conclusions



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五大核心结论 Five Key Conclusions

01 **借贷业务五大维度全 “成功”** | **NDB** 规模最大、效率最高国别组合，契合中国发展重点与 **NDB** 宗旨

Lending: “Successful” across all 5 dimensions. NDBs largest, most efficient portfolio.

02 **本币融资为核心亮点** | 人民币占比 68.8%，远超NDB整体战略目标，规避汇率风险，提供可复制模式

Local currency: key highlight. 68.8% RMB share, well above 30% target.

03 **借款人强劲表现是成功基石** | 完善治理、财政纪律与 ESG 责任保障项目按期交付

Strong borrower delivery underpins successful cooperation.

04 **非借贷业务有待提升** | 资源投入有限，TA、能力建设等缺乏统一制度框架

Systemic gaps in non-lending; no unified institutional framework.

05 **体制性因素制约合作潜力** | 缺国别战略、金融产品单一

Institutional bottlenecks constrain partnership potential.



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评价建议

Recommendations

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四项延续性评价建议

A. 延续性建议（此前多次评价提出，仍需推进）

(1) 制定专属中国的国别合作战略，衔接"十五五"规划与 NDB 2027–2031 总体战略

(2) 优化项目筹备、监测与评价体系，强化前期技术介入与科学需求预测

(3) 系统化推进技术援助与能力建设，动用项目准备基金

(4) 完善研究与知识管理体系，搭建统一知识档案库

(5) 推进放款流程数字化，上线面向借款方的线上服务端口

A. Continuing Recommendations (raised in prior evaluations)

(1) China-specific country strategy aligned with 15th Five-Year Plan & NDB 2027–2031 strategy.

(2) Refine project M&E system; strengthen early-stage technical support & demand forecasting.

(3) Scale TA/capacity building, mobilize PPF.

(4) Upgrade knowledge management, build unified knowledge repository.

(5) Digitize disbursement, launch online borrower portal.









B–D. 本次新增建议

战略类

- 丰富金融工具：币种转换、利率弹性、担保、股权投资；非主权短期固定利率贷款
- 深化多方合作：扩大同业 MDB 联合融资，对接 CSO 与绿色民营企业

运营类

- 完善财务经济评价方法：统一门槛收益率、敏感性分析、范围二碳排放核算

机构建设类

- 将中国业务部正式设立为独立部门，配齐专业人员，建立直接向高层汇报机制





B–D. New Recommendations

Strategic

- Broaden financial instruments: currency swap, flexible rates, guarantees, equity, non-sovereign short-term fixed-rate loans.
- Expand MDB co-financing; engage CSOs and green private firms.

Operational

- Upgrade financial appraisal: standardize hurdle rate, sensitivity analysis & Scope 2 carbon accounting.

Institutional

- Formalize China Desk into independent unit, recruit specialists, establish direct senior reporting.



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全球经验与启示

Replicable Lessons

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中国经验为 NDB 全球业务提供五条可复制启示

Five Replicable Insights from China's Experience for NDB Global Operations

01 **本币融资模式　在岸债券发行 + 本币放贷，有效规避汇率风险、深化当地资本市场**

Local Currency Financing Model Onshore bond issuance + local currency lending to mitigate FX risks and deepen local capital markets.

02 **高效项目交付　依托东道国成熟体系、简化审批流程，实现高执行效率与成本节约**

Efficient Project Delivery Leverage mature host country systems and streamline approvals for high efficiency and cost savings.

03 **南南知识分享　中国基础设施最佳实践为其他新兴市场提供务实、可落地解决方案**

South-South Knowledge Sharing China's infrastructure best practices deliver practical, implementable solutions to other emerging markets.

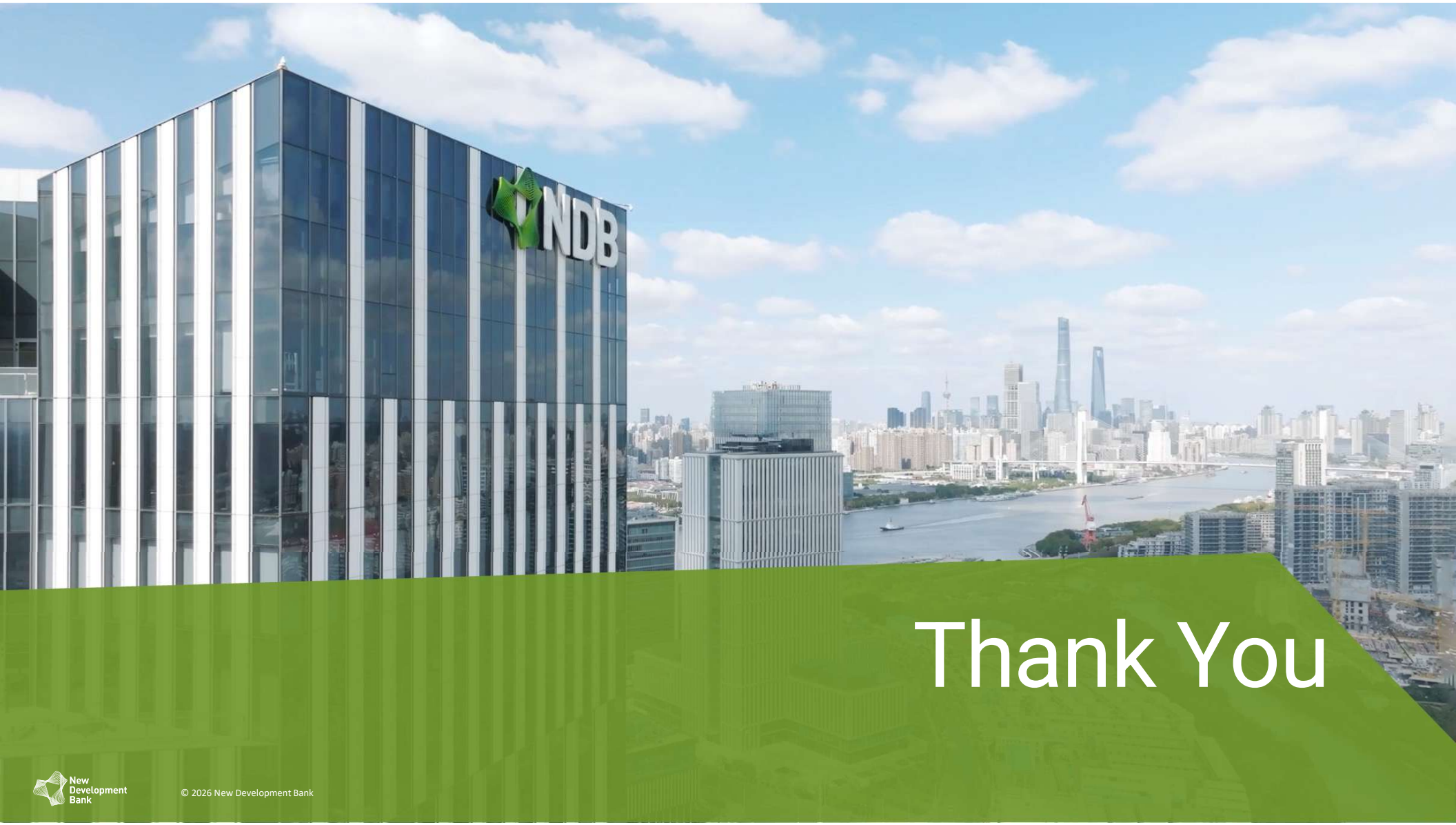
04 **快速应急响应　40 天抗疫融资流程可复制至其他成员国危机应对场景**

Rapid Emergency Response 40-day pandemic financing process, replicable for crisis response in other member countries.

05 **ESG 本土化路径　将全球标准与当地实际结合，提升可持续发展成效**

ESG Localization Pathway Align global standards with local realities to enhance sustainable development outcomes.





Thank You

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