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Briefing Note: Innovation and the Global Water Agenda – summary of the survey and discussion at the Global Water Summit

Introduction

This note summarises the ‘Innovation and the Global Water Agenda’ session at the Global Water Summit. Included are:

- Key results from a survey carried out by Global Water Intelligence to understand the views of private water solution providers about engagement with the United Nations regarding innovation.
- Summary of comments and interventions from the Global Water Summit session, split into two panels, which included a discussion on the survey.

Although the statistics show an alarming disconnection between the private sector and the UN, they also revealed what private organisations believe are the opportunities for partnership and collaboration to boost innovation in water. The expert panel explained where the barriers are to innovation and what the UN and government can do to remove them.

Key results from the survey

These are based on a survey of 305 private water solution providers of various sizes and locations.

Have solution providers engaged with the UN before?

- 48% of have had no engagement with the UN.
- 1.3% use UN data.
- 4% have partnered with the UN on a project.
- 28% think the UN has a role in growing market opportunities

- 45% think the UN has a role in accelerating innovation

The biggest challenges where UN engagement could be most beneficial. Issues rated as 'most important'

- 60% Water, hygiene and sanitation for all
- 57% Accelerating investment
- 55% Reducing pollution and increasing water quality
- 52% Physical water security
- 45% Accelerating innovation
- 35% Building enabling environments
- 28% Growing market opportunities

How the UN can accelerate water innovation

- 76% Foster and showcase impactful solutions
- 73% Support pilot and demonstration projects
- 59% Highlight challenges needing innovation
- 57% Deliver common strategy for finance access

The obstacles contributing to SDG6

- 65% Governments focus on low capital costs bids rather than lifecycle costs
- 56% Public agencies lack budgets to pay for products and services
- 45% Regulatory uncertainty or inconsistent standards across markets
- 44% Perceptions of corruption and lack of procurement transparency

Where solution providers see innovation impact

- 74% Water and wastewater treatment technology
- 67% Financial structures so agencies can pay and maintain solutions
- 65% Desalination, reuse and unconventional resources
- 48% Procurement reform around lifecycle costs.

The survey was carried by Global Water Intelligence in partnership with AquaFed, IDRA, the CEO Water Mandate and CDP.

Views from the Expert Panels

The 'Innovation and the Global Water Agenda' session's objectives were to :

- highlight the results of the GWI survey
- understand where utility operators see policy/legal/regulatory barriers to innovation
- explain what UN, other intergovernmental institutions and national governments can do to stimulate further innovation in the water sector.

Panel 1: Why innovation stalls (what are the legal, regulatory and policy barriers)?

- Alex Plant, CEO, Scottish Water
- Criselle Alejandro, President, Balibago Waterworks
- Annabel Mouquet, Executive Vice President, Veolia Water Technologies, Europe
- Juan Luis Castillo Castilla, Director of Strategic Development and Studies

Six themes emerged from this panel, who immediately expressed surprise that 48% of respondents had never engaged with the UN. The panel was unanimous that the UN has a role to play in supporting innovation and gave examples of the barriers, but also how to overcome them.

There was also a shared optimism that political and corporate leaders are increasingly understanding that water is a competitive advantage and key to environmental security. This means there is huge potential for growth in the sector, and the UN can provide leadership and direction on the priorities identified in the survey.

Broken governance

Innovation is hindered by fragmented regulation between national agencies and local government units, restrictive public procurement processes, regulatory uncertainty around emerging technologies like AI, and strict compliance barriers for medium and small enterprises attempting to scale. This is the case in the Philippines, where although there is legislation in place to try address the bottlenecks, widespread implementation gaps persist. One of the fundamental factors behind the current problems in the English water sector is that there has been no unifying water policy, with adversarial relations between companies & regulators.

In contrast, in Scotland, innovation is boosted by a water sector vision for Scotland that unites the utility, the government, regulators and others – all aiming for the same high-

level goals. There are high levels of trust and confidence, framed within a legislative and policy framework that has supported delivery of efficiency and investment.

Joint vision backed by National Water Strategies

Connected to the theme of governance is the need for a joint vision that is embedded into National Water Strategies, that address the root causes behind the SDG6 gap, such as poor data, fragmented institutions and constrained revenue streams. These are highlighted in a draft report from Oxera currently out for consultation. National strategies that cover data, regulation, funding and finance, will inevitably lead to much greater potential for innovative water solutions.

The need for positive and enabling regulation

There are good examples of where regulation boosts progress. European Union legislation to remove micro-pollutants and reduce PFAS concentrations are stimulating innovation in wastewater treatment. Connected to this is Extended Producer Responsibility Rules - that companies placing polluting products on the market should help pay for removing those pollutants from wastewater and the environment. This essentially puts responsibility for managing pollution, and the innovative tools needed, in one place.

The EU Water Reuse Regulation is another positive move that stimulates innovation although EU Member States have been slow to implement them.

Risk-averse public authorities

Governments and municipalities are cautious about deploying tech at scale. They are too often unwilling to take necessary risk and will not bear costs for funding innovation. This is both due to water being 'too political' as well as a lack of expertise in public authorities. Obstacles highlighted in the survey were:

- 40% said governments have limited project preparation funding to pilot and scale
- 34% said public agencies lack the capacity to procure or operate solutions.

Stronger partnering is a solution, which includes the private sector also stepping up their efforts with the public sector to jointly help reduce risk.

Private sector tech and innovation working in silos

As well as partnering with public authorities, private solution providers also need to partner with each other better to provide hybrid solutions. An ecosystem approach is needed – where the solution is in fact a combination of different technologies – an obvious example being wastewater and energy. The survey said 73% of respondents want UN support for pilot and demonstration projects, which should include bringing solution providers together.

Practical and logistical issues

There are often logistical problems that become barriers to innovation that are not directly related to the water sector. In the Philippines for example, telecommunications and connectivity is also a big issue hindering innovation that relies heavily on an internet connection. New entrants to the telecommunications or data transmission sector requires a legislative franchise which is costly and time consuming to acquire. So work by the UN and governments to improve innovation in water must include a broader approach to identifying barriers.

Panel 2: What can the UN and governments do to boost innovation in water?

- Nada Abubakr, Head of Water, WSP
- Mary Matthews, Global Water Lead, UNDP
- Bruno Hervet, CEO Suez Europe and President of AquaFed
- Natalie Degger, Industrial Development Officer, UNIDO

This panel was also very surprised by both the low level of interaction between the UN and the private sector and the extremely low use of UN data. There was agreement that UN Water needs to take on board the results of the survey and provide a response. The group agreed that the UN Water Conference is not just a moment for discussion but must be a starting point for action involving shaping and deploying pilots and projects based on water innovation – whether using basic or high-tech solutions.

Moving beyond convening and pledging into genuine co-creation of solutions.

The tech sector is renowned for using design-thinking approaches that bring all relevant voices into the room, including the voice of community, to collectively design solutions. The process requires people to step beyond their institutional positions and preconceived ideas of what 'good' looks like. But this is where the innovation happens. What emerges is usually far more practical, inclusive and scalable because the solution has been shaped by everyone who will ultimately interact with it or be impacted by it.

UN agencies should create spaces for this kind of collaborative design - not just discussions about challenges, but structured working sessions to co-develop implementation pathways.

Procurement was cited as an example. Across the sector, many corporates engage through pilot projects but often struggle to move from pilots to long-term scale. If stakeholders co-designed procurement models together; governments, multilaterals, private sector and delivery partners; they could create clearer pathways for scale-up, shared accountability, and ultimately much greater impact.

More work to help governments understand the value of water

Although there has been work to understand water's true values, not enough has been done to quantify the economic value. The UN should be more active in establishing what exactly is the value of water, not only by gathering tariff data but doing studies of the cost of producing safe and clean water whether it comes from freshwater, polluted water, desalination, or wastewater, to have a baseline understanding of the cost to produce potable water.

The UN must then communicate this to governments because most still undervalue the price of water. Further, governments need to understand the cost of water transmission and distribution because these also add greatly to closing the gap between those who have access to water and those who don't have access.

As one participant explained, if we consider the situation of having no water at all, then water's value becomes infinite.

Develop a shared culture and language on innovation

Private water solutions providers can do more to bridge the communication gap between them and the UN and development community. These groups often use different terminology and operate from different perspectives. Terms such as

“investment” are frequently used without a clear understanding of risk appetite or financial realities, which leads to confusion.

The UN and private sector should also collectively develop a common language, culture and vision on technology and innovation in the water and sanitation sector between the various stakeholders, including public utilities, private sector, traditional knowledge holders, academic research and water users. This will reduce risk-aversion and accelerate the implementation of existing solutions on the ground, as it is in other essential services such as transports or energy.

Build capacity in public authorities to accelerate innovation

Although the survey said 48% of respondents ‘definitely’ think forging partnerships for local capacity can accelerate innovation, the panel put much greater importance on this. Increasing understanding of and capacity in governments for all forms of public private partnerships enable more effective project structuring and implementation. The UN should put much greater focus on helping government and public authority officials to understand how to put conditions in place that enable innovation.

Innovation in partnerships

Also, innovation means innovative thinking in terms of the structure of partnerships. The UN is encouraged to consider examples that were given of performance-based models to reduce water demand and enhance climate resilience, rethinking the foundations of concession contracts in the light of growing scarcity in the resource. Also, regulatory adaptation where solution providers work with national authorities to co-develop regulatory standards which are effective in the long-term.