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12TH ASIAN DEVELOPMENT BANK BUSINESS OPPORTUNITIES FAIR 2024

9–10 OCTOBER 2024 | 9 A.M. to 5 P.M. | ADB HEADQUARTERS, MANILA

Transport Sector – Southeast Asia Operations

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Southeast Asia Developing Member Countries

Country	ADB Transport Portfolio, \$ million	Remarks
Cambodia	142	Relatively small transport portfolio
Indonesia	113	ADB transport recently resumed; Portfolio expansion underway
Laos PDR	74	Relatively small transport portfolio
Myanmar	N/A	Operations currently suspended
Philippines	6,028	Largest in SEA (; One of the largest portfolio in ADB operations
Thailand	0.7	Sparse in sovereign lending; More active in PPP investment.
Timor-Leste	397	Relatively active portfolio despite being the smallest DMC in SEA
Vietnam	1,162	Relatively large portfolio with long-standing projects to complete



Region/Country Strategy

Key Focus Area	Countries
National road and highway network development with regional connectivity impact	Cambodia, Laos PDR, Timor-Leste, Vietnam
Network development for national railways and urban metro	Indonesia, Philippines, Vietnam
Urban transport and green/smart mobility	Indonesia, Philippines, Thailand, Timor-Leste, Vietnam
Road safety improvement	Cambodia, Philippines, Thailand, Vietnam



Lending Pipeline, 2024

Project Name	Country	ADB Amount (\$ million)	Modality
Trans South-South Java Road Project	INO	300	Project
Malolos-Clark Railway Project, Tranche 2	PHI	1,450	MFF
Laguna Lakeshore Road Network, Tranche 1	PHI	1,698	MFF
Climate Resilient Connectivity for the Eastern Economic Corridor Project: the Intercity Motorway No.7 (Extension to Link with U-Tapao Airport)	THA	65	Project



Lending Pipeline, 2025-2027

Project Name	Country	ADB Amount \$million	Modality
Jakarta Mass Rapid Transit East-West Line Project Phase 1 Stage 1	INO	660	Project
Manila Metro Rail Transit Line 4 Project	PHI	1,000	MFF
East to South Coast Road Connectivity Project	TIM	110	Project
Timor-Leste Public Transport Project	TIM	40	Project
Railway Crossing Improvement Project (PRF)	INO	15	PRF
South Commuter Railway Project, Tranche 2	PHI	1,750	MFF
Sustainable Mass Transit Improvement Project – EV Public Bus (Bangkok)	THA	150	Project



Non-lending Pipeline, 2024-2026

Project Name	Country	ADB Amount \$ million	Year
Preparing East to South Coast Road Connectivity Project and Strengthening the Road Sector Institutional Capacity (Additional Financing TA 6809)	TIM	0.5	2024
Sustainable Urban Transport Project	INO	0.4	2024
Strengthening Urban Resilience and Fiscal Capacity for Climate Actions	INO	1.5	2024
Preparing and Implementing Climate and Disaster-Resilient Transport Projects in the Philippines	PHI	1.0	2024
Southeast Asia Low Emission Zone Framework Development	REG	0.225	2024
Supporting the Indigenous Peoples and Vulnerable Groups along the Clark–New Clark City Railway	PHI	2.0	2025
Preparing the Climate Resilient Road Development for Regional Connectivity	THA	0.5	2025



Opportunities

Project Name	Country	Package Description	Amount \$ million	Method	Timing
Road Network Improvement Project (Phase 2)	CAM	Civil works (CW) package for additional scope	20	ICB	Q2 2025
Bataan-Cavite Interlink Bridge Project	PHI	Consultancy services for construction supervision	140	Firm, International	Q2 2025
		3 CW packages for marine viaducts and cable-stayed bridges	3,060	ICB	Q2 2025
Metro Manila Bridges Project	PHI	CW package for bridge	38	ICB	Q3 2025
		Consultancy services for construction supervision	10	Firm, International	Q1 2025



Opportunities

Project Name	Country	Package Description	Amount \$ million	Method	Timing
Manila Metro Rail Transit Line 4	PHI	Early works – site clearance packages 1,2,3	10	NCB	Q4 2024
		General consultant	60	Firm, International	Q4 2024
		CW of viaduct, stations, depot	750	ICB	Q1 / Q2 2025
		Railway systems and trains	550	ICB	Q3 / Q4 2025
Emergency Assistance for Reconstruction and Recovery of Marawi	PHI	CW of viaduct, drainages, open channels, and 2 bridges	66	ICB	Q1 / Q2 2025



Opportunities

Project Name	Country	Package Description	Amount \$ million	Method	Timing
Epifanio de los Santos Avenue Greenways Project	PHI	CW of walkways	121	ICB	Q2 2025
Infrastructure Preparation and Innovation Facility Second additional financing	PHI	Multi consultancy service packages for preparation of masterplan, feasibility study, detailed engineering design for 17 projects (airport, port, bridges, roads, railways, and floodway control, etc.) across Luzon, Visayas, Mindanao	143	Firm, International	Q4 2024 - Q2 2025



Opportunities

Project Name	Country	Package Description	Amount \$ million	Method	Timing
Laguna Lakeshore Road Network	PHI	3 CW packages for 3 road sections	1,568	ICB	Q3 2025
		Consultancy services for Construction supervision	44	Firm, International	Q2 2025
Proposed East to South Coast Road Connectivity Project	TIM	CW of road rehabilitation	45	ICB	Q4 2025
		Consultancy services for Construction supervision	6	Firm, International	Q4 2025
Mekong Delta Region Master Plan Roads Project	VIE	Consultancy services for feasibility study of upgrading 340 km of provincial roads	1.5	Firm, International	Q4 2025
HCMC Line 2	VIE	CW of tunneling	TBA	ICB	Q1 2026



Lessons Learned

- Improved project readiness for Philippines using IPIF (Infrastructure Preparation and Innovation Facility)
- Substantial delays in implementation of metro projects in Vietnam (Hanoi and Ho Chi Minh City)



Issues/ Challenges

- Weak governance and implementing capacity
- Rigid rules and regulations
- Political instability/ volatility
- Rapid increase in urbanization and environmental degradation
- Climate change impacts
- Natural hazards



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Thank you!

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