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ADB

# Transport Sector Operations

15 April 2025

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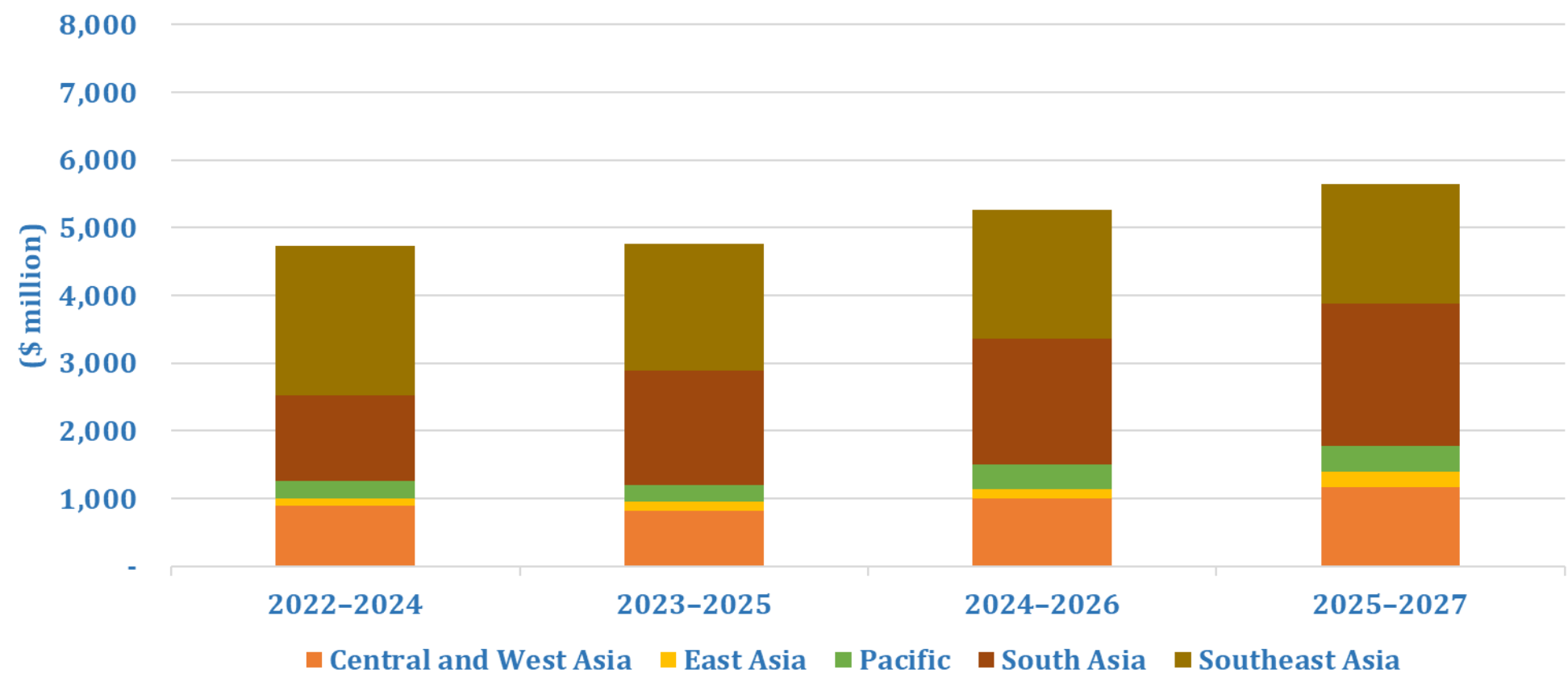
BUSINESS  
OPPORTUNITIES

# Key Trends and Challenges (主なトレンドと課題)

- \$560 billion annual transport infrastructure investment needed for connectivity in 2016-2030\* (年間5,600億ドルのインフラ投資ニーズ)
- Increasing emissions of greenhouse gases and climate and disaster impacts (温暖化ガス、気候・災害リスクの増加)
- Environmental hazards and risks of aging transport infrastructure (老朽インフラの環境等へのリスク)
- Fastest rates of urbanization in the world, rising inequalities, home to 7 of 10 largest megacities, high traffic congestion, 60% of global road crash fatalities (世界で最も急速に都市化が進む地域、交通事故の増加)
- Rapidly growing digital economy and infrastructure, smartphone ownership, e-commerce, and availability of real-time information (デジタル化の急速な進行)
- Major supplier to global markets – with 45% of global export flows produced in the region by 2050 (グローバルサプライチェーンでのプレゼンス向上)

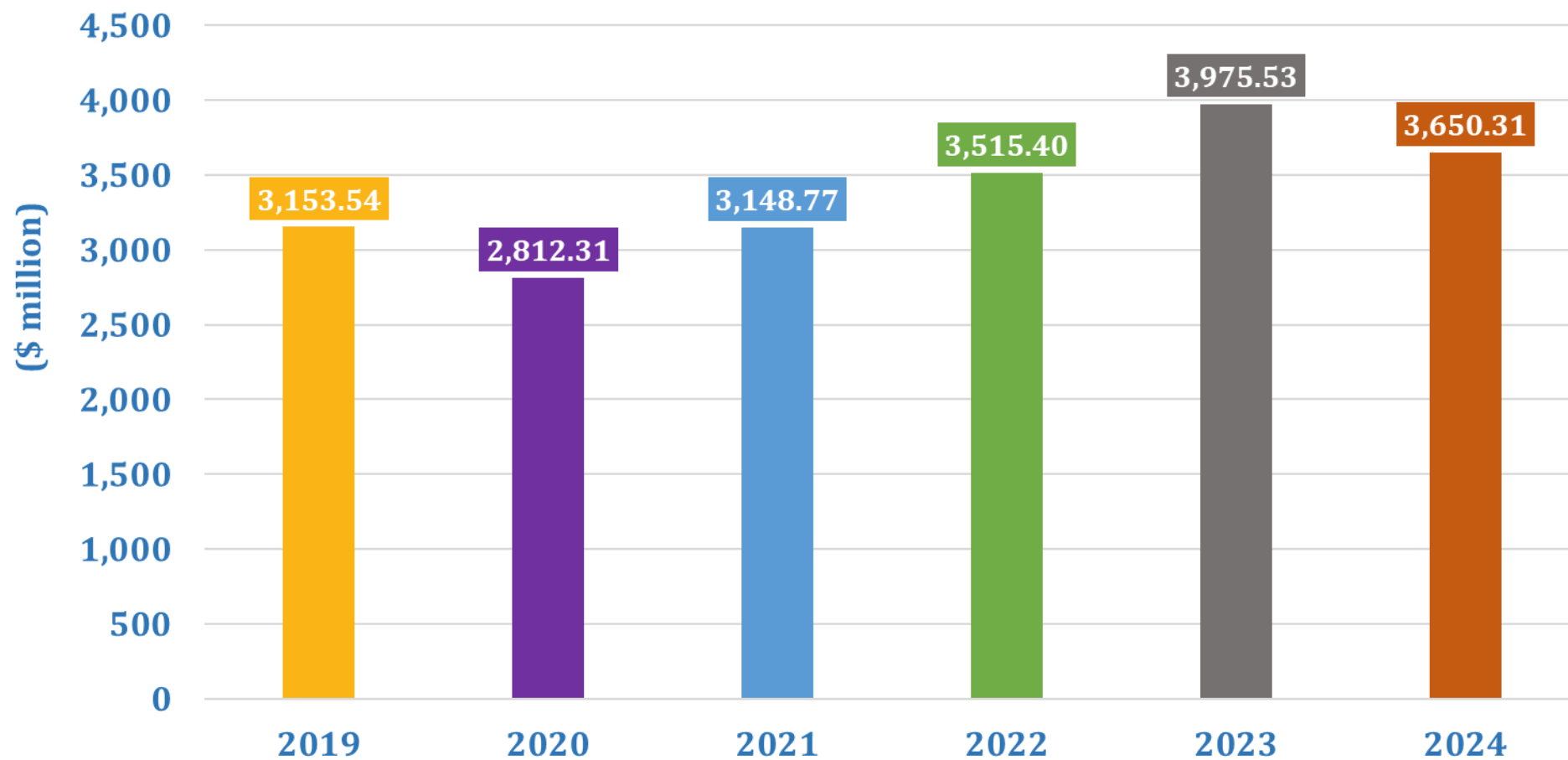
# Commitments (承諾額の推移と見通し)

## Loans and Grants (2022 to 2027): 3-Year Moving Average



Note: ADB financing only.

## Disbursements (融資額の推移)

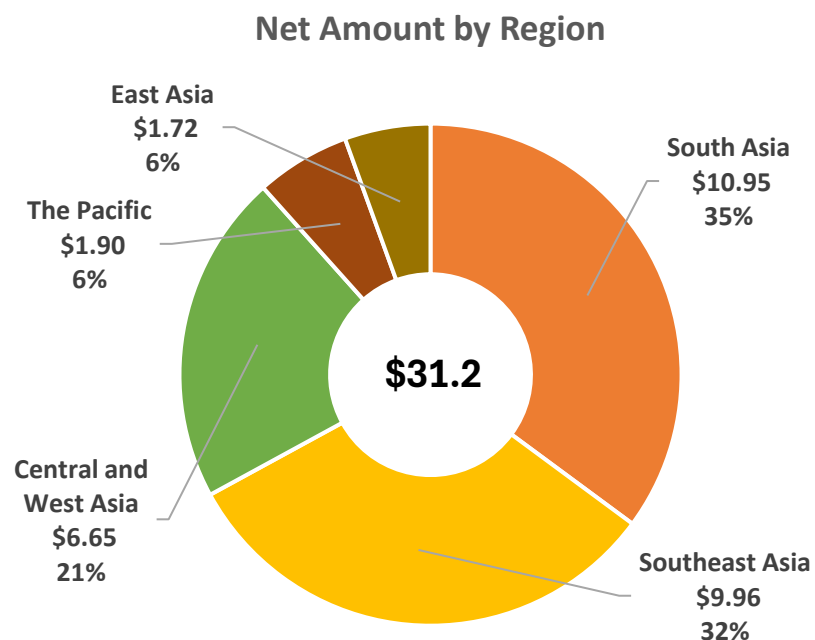


# Active Loans/Grants Projects

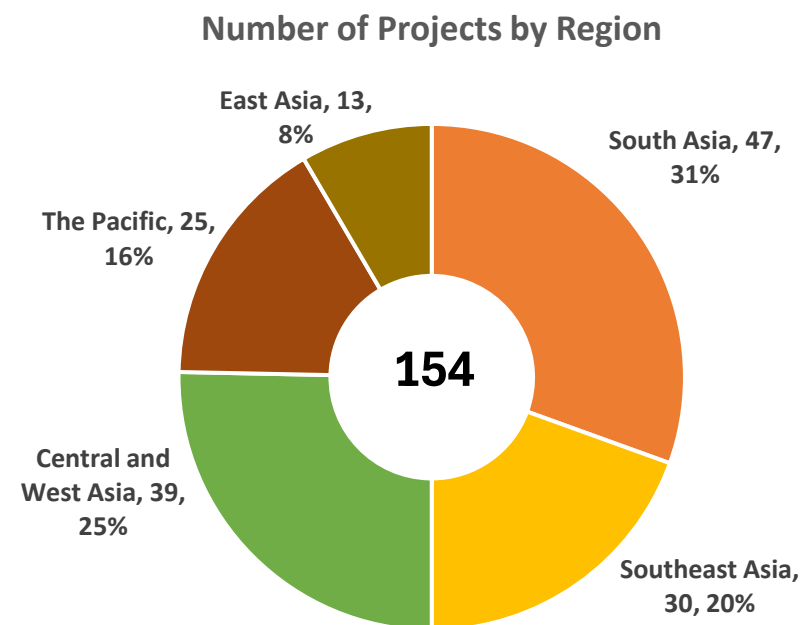
(ポートフォリオ地域別内訳)

as of December 2024

By Amount  
(Total \$31.2 billion)



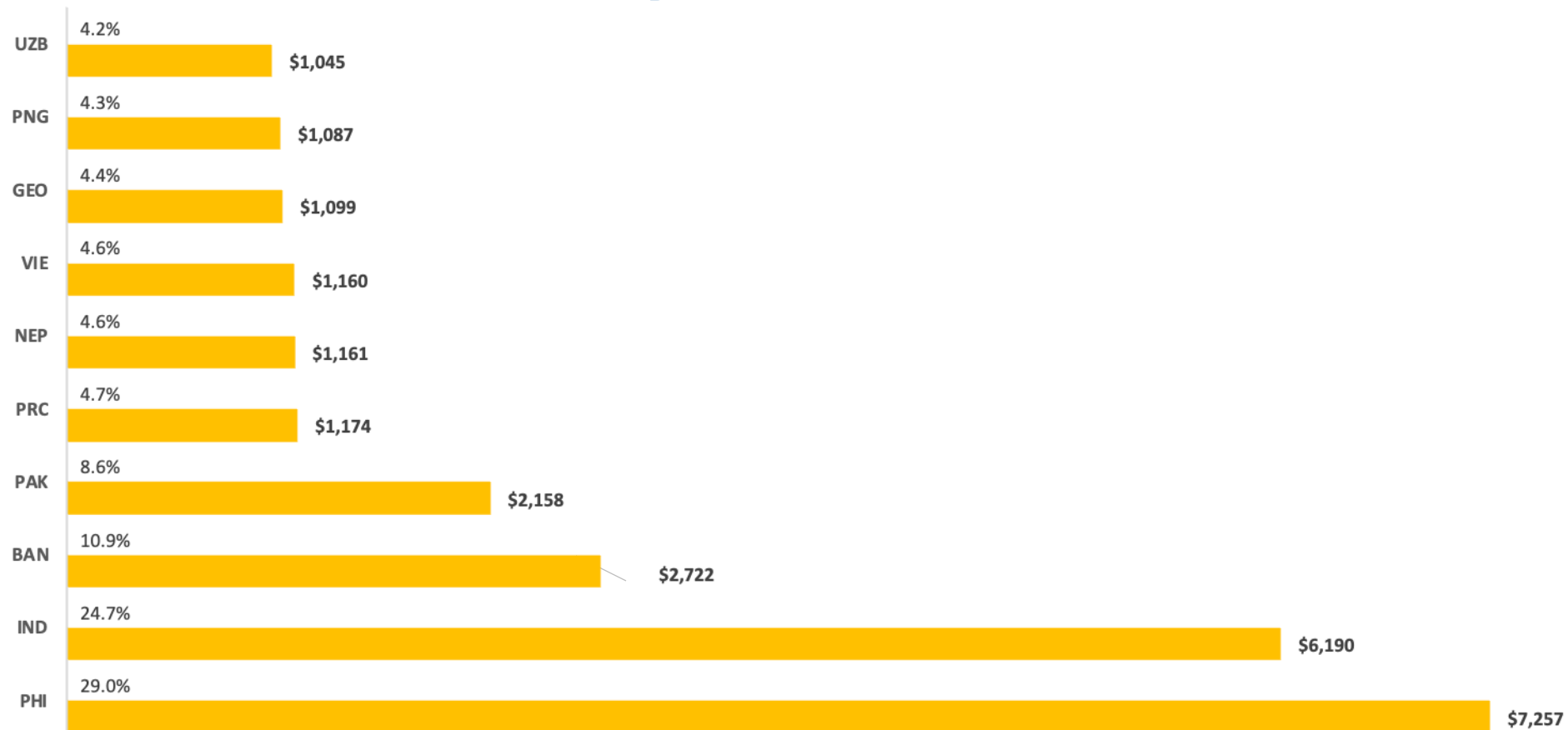
By Number  
(Total 154)



# Active Loans/Grants Projects (上位10カ国)

as of December 2024

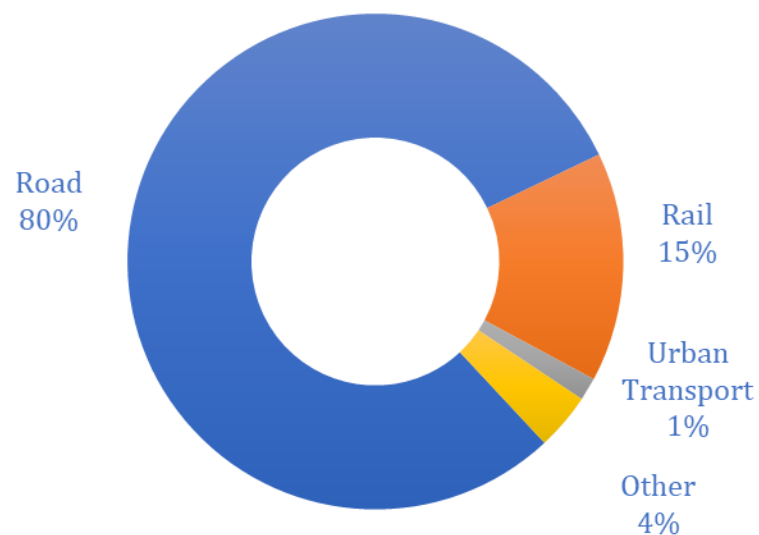
## Top 10 DMCs, 2024



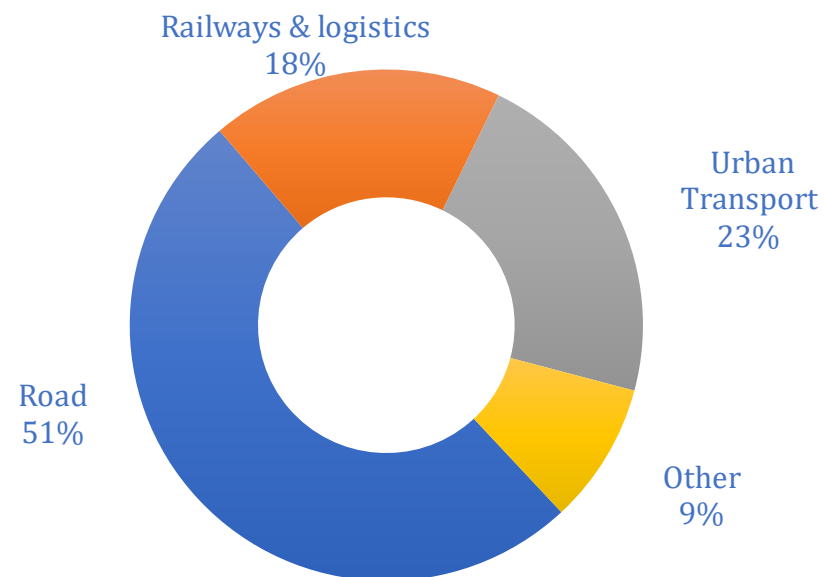
# Climate Financing (気候変動対応融資の傾向)

Transport climate finance is projected to reach \$25 billion by 2030, supported by **significant subsector assistance shift**

## Transport Sector in 2010



## Transport Sector in 2024



# Climate Change Shift (気候変動対策の強化)

Developing projects in innovative areas to enhance TRA climate impact

- mass transit (大量輸送網の整備)
- greening railways (鉄道のグリーン化)
- maritime decarbonization (海運の脱炭素化)
- new fuels (hydrogen, sustainable aviation fuel)  
(クリーン燃料への転換)
- system electrification (電化の推進)
- urban e-mobility (Eモビリティの都市への導入)





# Private Sector Development Shift

(民間セクター開発の強化)

## Private Sector's Strategic Focus Areas

- E-mobility (Eモビリティ)
- Greening/electrification of port and airport facilities (港と空港のグリーン化)
- Sustainable aviation fuel and other decarbonization measures for aviation (航空輸送の脱炭素化)
- Cross-border/regional cooperation (クロスボーダー、地域連結)
- Operations and maintenance (維持管理)

## ADB support tools

### Upstream

- Technical Assistance

### Midstream

- Transaction Advisory Services

### Downstream

- Investment financing



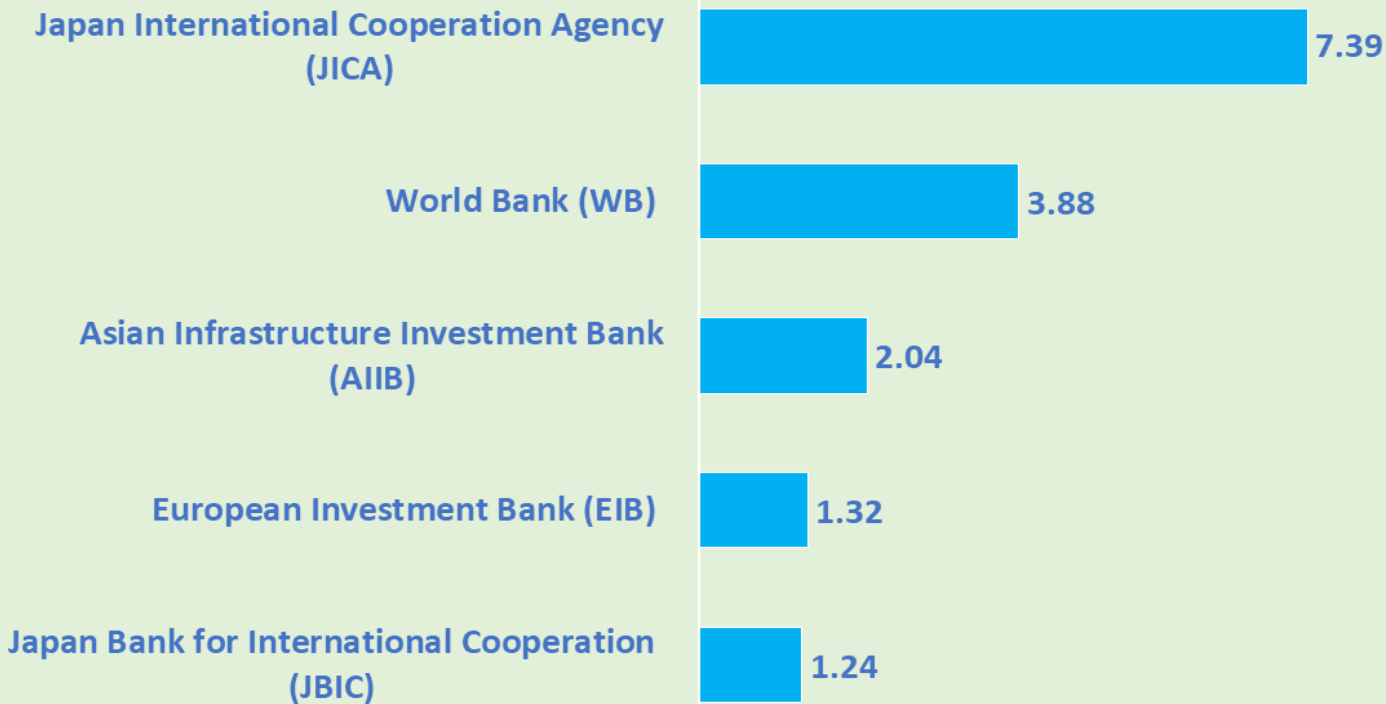
# TRA Operations Cofinancing

## (主な協調融資機関)

ADB has partnered with **75 organizations** from 1970 to date, with **\$24.24 billion** cofinancing partnerships for TRA operations.

### Top Cofinancing Partners, 1970 to date

(\$ billion)





# Focus on Project Readiness

(プロジェクト準備段階での支援強化)

## Increasing use of Project Readiness Financing

- Strengthening due diligence of project proposal.
- Preparing engineering designs, bidding documents and safeguard documents.
- Enhancing the project quality and implementation readiness at ADB project approval.

## Increasing use of advance contracting

Bids are invited before ADB project approval.





# Project Highlights Southeast Asia



# PHILIPPINES

## Bataan-Cavite Interlink Bridge Project

**Total Amount:** \$4.35 billion

**ADB:** \$2,111 million (MFF)

\$650 millions (tranche 1)

**Cofinancing:** \$1.14 billion (AIIB)

**Counterpart:** \$1.10 billion

**Approval:** 12 December 2023

**Client:** Department of  
Public Works and Highways

### Scope of Work:

Construction of a 32.15km long bridge, comprising two cable-styled bridges for navigation channels, 24km of marine viaducts, and 8km of approach roads

### Project Description:

Permanent road link between the provinces of Bataan and Cavite, the key missing link in the road network of the National Capital Region, Central Luzon, and CALABARZON.

Inclusion of Tourist centre to provide information about the rich ecosystem and diversity of destinations on the Bataan Peninsula and Corregidor Island.





## PHILIPPINES:

### Laguna Lakeshore Road Network Project

**Project cost:** \$2.4 B, of which ADB = \$1.7 B

**ADB:** \$1,698 million (MFF)

\$1,189 million (Tranche 1)

**Cofinancing:** \$188 million (AIIB)

**Counterpart:** \$549 million

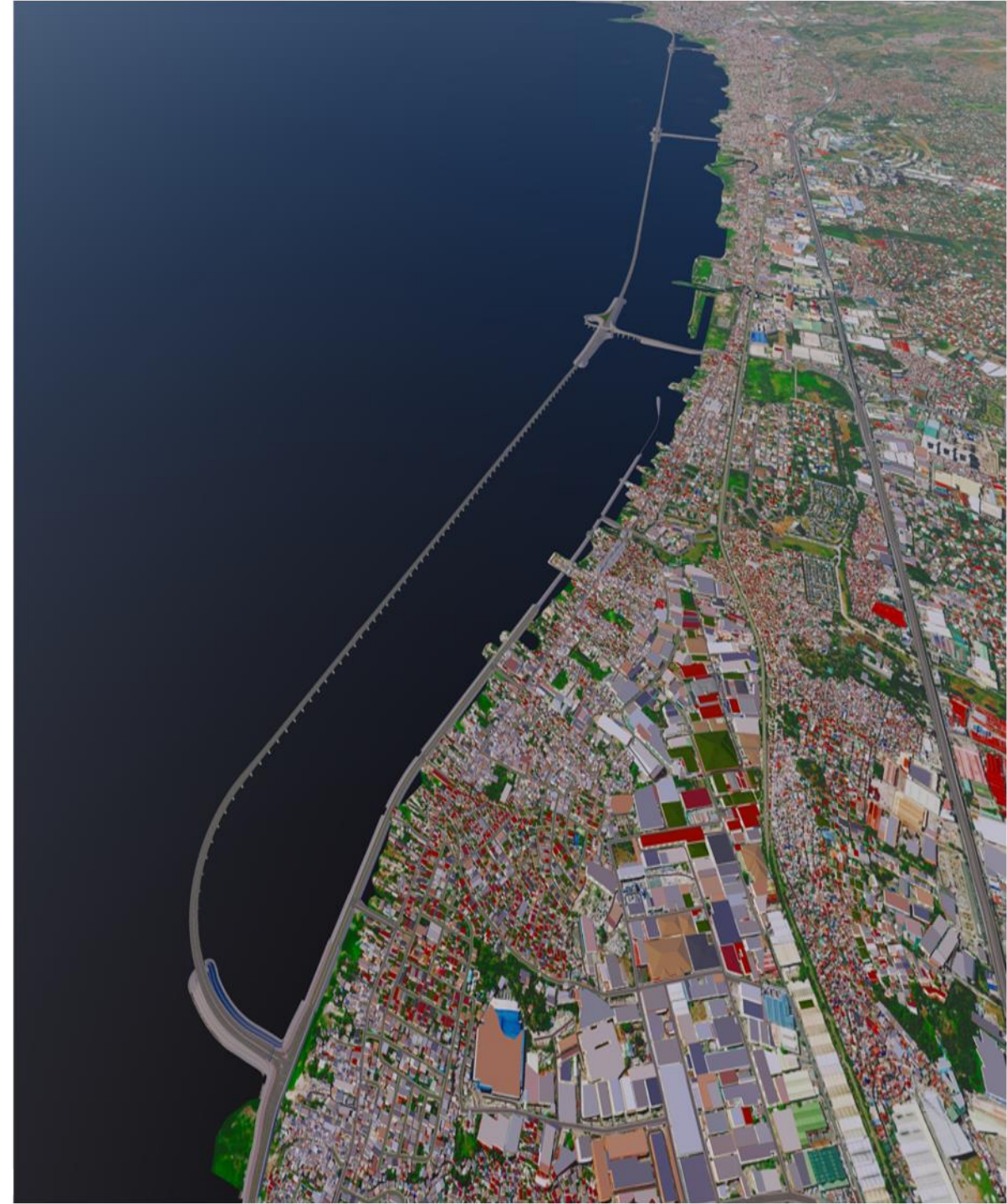
**ADB approval:** November 2024

#### Project Description:

The project will improve efficiency of road travel in the Greater Capital Region.

An expressway along Laguna Lakeshore will be built.

The project will strengthen institutional capacity of the Department of Public Works and Highways.



# PHILIPPINES

## North–South Commuter Railway (NSCR) O&M Concession

**Client:** Department of  
Transportation

**Estimated Project Size:**

- Build cost: \$15 billion;  
O&M cost: \$3 billion

**Scope of Work:**

- Transaction Advisory Services
  - Provide advice on legal requirements, risk allocation, and structuring the O&M contract.
  - Assist in the tender process, including preparing documents, evaluating and selecting the winning bidder, and finalizing concession agreements.
- Provides additional support for capacity building, including developing contract implementation and monitoring capabilities.

**Project Description:**

The North–South Commuter Railway is a 147-km rail line, cofinanced by ADB and JICA, which will cut travel time between Metro Manila and Clark to under 1 hour.

The O&M Concession involves sovereign-funded construction and private sector-managed operations and maintenance through a long-term concession agreement. The tender for the North-South Commuter Railway's O&M concessionaire will involve availability payments tied to performance.





# INDONESIA

## Jakarta MRT East-West Line – Phase 1 Stage 1

### Client:

Directorate General of Railways of the Ministry of Transportation, and the Government of Special Capital Region of Jakarta  
(Acting through PT. MRT Jakarta)

Parallel cofinancing with JICA

### Scope of Works:

Civil works and consulting service for project management support.

### Project Description:

Expansion of the mass rapid transit (MRT) network in the Jakarta Metropolitan Area (JMA). It will support the development of the Jakarta MRT East-West Line – Phase 1 Stage 1, for about 25 km along the major east-west corridor in Jakarta. The new East-West Line will be connected with the existing MRT North-South Line and other mass transit systems operating in JMA.





# Timor-Leste

## Dili to Baucau Highway Project

A \$49.65 million loan to upgrade and climate-proof 105 km of the national road between the capital, Dili, and the second-largest town, Baucau located on the north coast.

ADB cofinances the proposed project on a parallel basis with JICA. ADB supports upgrading and climate-proofing 56 km of the road connecting the towns of Manatuto and Baucau, and JICA supports the section between Dili and Manatuto (49 km).





# Opportunities – Southeast Asia Region

## Lending Pipeline, 2025 to 2027 (1/2)

Country	Project Name	ADB Amount \$million
INO	Jakarta Mass Rapid Transit East-West Line Project, Phase 1 Stage 1 (Tranche 1)	300
INO	Sustainable Energy Transition and Public Transport-DAMRI Electric Bus Project	47
INO	Trans South-South Java Road Project	300
INO	Railway Crossing Improvement Project (Project readiness financing)	15
INO	Indonesia Resilient Road Transport Improvement Program	600
PHI	Manila Metro Rail Transit Line 4 Project (Tranche 1)	300
PHI	Clark–New Clark City Railway Project	TBD
PHI	Port Development to support Offshore Wind Parks	TBD

*Note: Indicative only and subject to changes. Values are rounded.*





# Opportunities – Southeast Asia Region

## Lending Pipeline, 2025 to 2027 (2/2)

Country	Project Name	ADB Amount \$million
THA	Sustainable Mass Transit Improvement Project – EV Public Bus (Bangkok)	150
THA	Sustainable Mass Transit Improvement Project – EV Public Bus (Provincial Cities)	150
TIM	East to South Coast Road Connectivity Project	110
TIM	Timor-Leste Public Transport Project	40
TIM	Climate Resilient Connectivity Enhancement Project	4

## Nonlending Pipeline 2025

3 technical assistance projects totaling \$4.5 million (1 PHI; 1 THA; and 1 VIE)

*Note: Indicative only and subject to changes. Values are rounded.*





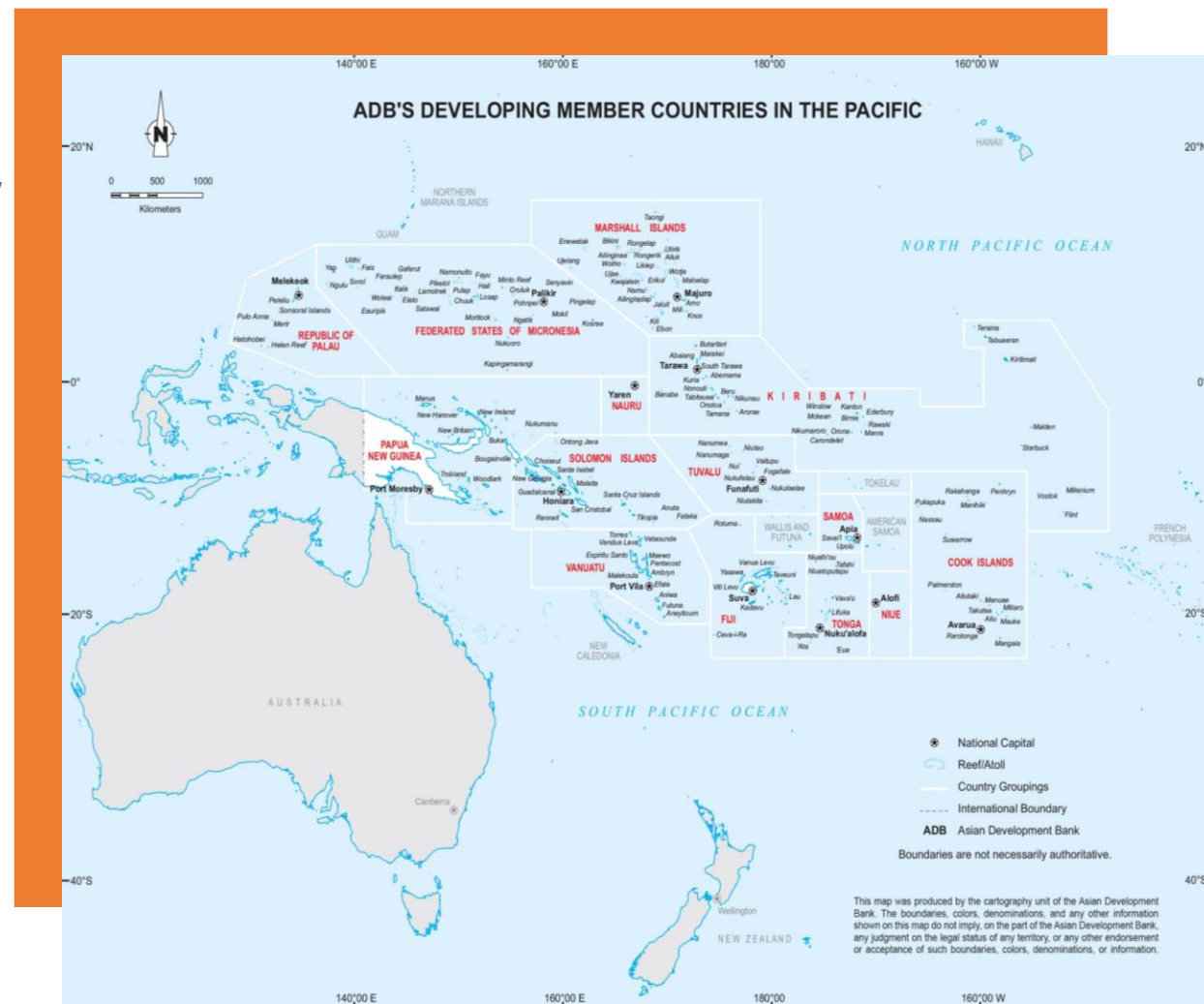
A tropical beach scene with a modern building, palm trees, and a stone wall. The building is white with large windows and balconies, situated on a sandy beach. Several palm trees are scattered around the building and along a low stone wall that runs along the shoreline. The ocean is a vibrant turquoise color, and the sky is a deep blue with scattered white clouds. The overall atmosphere is serene and tropical.

# Transport Sector Operations In the Pacific



# 14 Developing Member Countries in the Pacific

- Cook Islands
- Federated States of Micronesia
- Fiji
- Kiribati
- Marshall Islands
- Nauru
- Niue
- Palau
- Papua New Guinea
- Samoa
- Solomon Islands
- Tonga
- Tuvalu
- Vanuatu



# Pacific Approach 2021-2025

## Transport Sector Focus

Target	Key Focus Area
<b>Delivering Sustainable Services</b> (持続可能なサービスの提供)	<b>Quality infrastructure (質の高いインフラ)</b> <ul style="list-style-type: none"><li>• Overcome ‘build, neglect, rebuild’ patterns</li><li>• Provide long-term sector support for assets sustainability</li><li>• Support climate mitigation measures</li><li>• Align with Paris Agreement</li></ul> <b>Connectivity (連結性)</b> <ul style="list-style-type: none"><li>• Support the provision of transport connectivity for socioeconomic activities</li><li>• Strengthen intermodal transport and ICT</li><li>• Improve transport safety and security</li></ul>

# Pacific Approach 2021-2025

## Transport Sector Focus (2)

Target	Key Focus Area
<b>Enhancing Climate and Disaster Resilience</b> (気候・災害レジリエンスの強化)	<b>Climate Resilience</b> (気候レジリエンス) <ul style="list-style-type: none"><li>• Support climate change adaptation measures</li><li>• Strengthen institutional capacity of addressing climate change</li></ul> <b>Disaster Risk Reduction</b> (災害リスク軽減) <ul style="list-style-type: none"><li>• Support disaster risk management</li><li>• Support region's and/or individual country's response to disasters</li><li>• Expanding climate change support</li></ul>

# Mainstreaming the Use of Merit Point Criteria (より厳格な技術札審査の推進)

ADB promotes the use of **merit point criteria (MPC)** in the Pacific to improve development results.

- Increased focus on quality non-price metrics in bid-evaluation criteria

In 2020–2022, MPC was used in 69% of large value (>\$10 million) goods and works packages.

From Jan 2025, MPC is a default approach in the Pacific.



# Use of Regional Technical Assistance Facility

(地域全体をカバーするTAファシリティの活用)

- Support multiple countries in the Pacific for project preparation and implementation.
- Swiftly mobilize required expertise to emerging needs.

TA Number	TA Title	Amount	Approved in	Closing in
TA9968	Preparing Projects to Enhance Transport Connectivity and Resilience in the Pacific	5 million	April 2020	April 2026
TA10023	Preparing Projects to Enhance Transport Connectivity and Resilience in the Pacific – Phase 2	5 million	December 2022	January 2028

## FIJI

## Critical Bridges Resilience Project

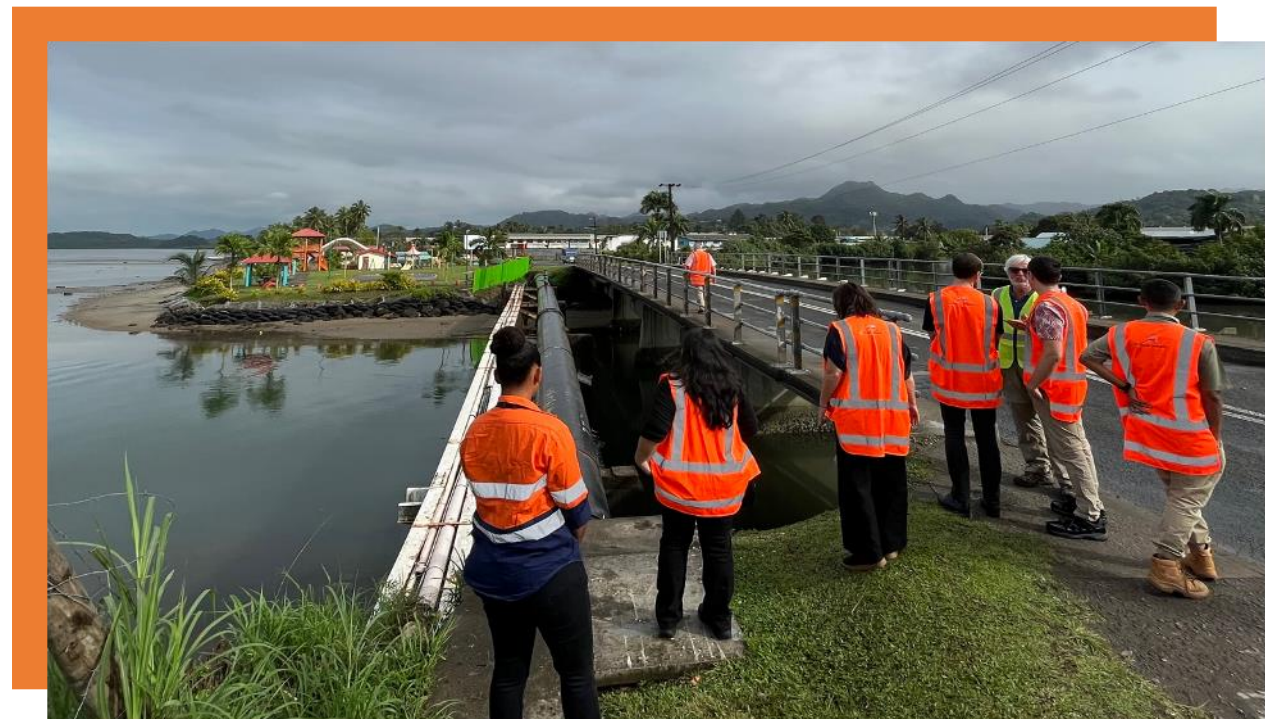
**Total Amount: \$199.5 million**

- ADB: \$134.5 million
- Cofinancing: \$50.0 million (WB)
- Counterpart: \$15.0 million

**ADB approval: November 2024**

**Project Description:**

- Improvement of Fiji's rural and urban transport connectivity
- Replacement of key bridges essential to domestic transport network
- Address the operations and maintenance capacity issues of the Fiji Road
- Authority on inspecting and maintaining the bridges



## Solomon Islands: *Land and Maritime Connectivity Project (2021)*

\$148.88 million loans and grants multitranche financing facility to support the rehabilitation and upgrading of about 35 km of roads in and around the capital, Honiara; the construction of two provincial wharves at Ahanga and Kira Kira; and the reconstruction and improvement of the old wharf in Honiara International Port.



## Papua New Guinea: *Sustainable Highlands Region Core Road Network Project (2024)*

\$266.1 million loans and grants including cofinancing grant \$0.7 million\* to improve five district roads totaling about 120 km and 19 bridges in four provinces in Highlands Region, which integrate the wider Highlands core road network.

The project will also contribute to enhance the socioeconomic and poverty reduction benefits of improved transportation, and support climate adaptation and improvement in agriculture production and livelihood diversification for subsistence farmers.

- Ireland Trust Fund for Building Climate Change and Disaster Resilience in Small Island Developing States





# Papua New Guinea

## ***Civil Aviation Development Investment Program (2009)***

\$480 million loans to upgrade the country's international and domestic airports improving compliance with the safety and security standards of the International Civil Aviation Organization.

## ***Civil Aviation Development Investment Project II (2022)***

\$162.9 million loans to upgrade five national airports for better safety and security in compliance with International Civil Aviation Organization standard, improve the power supply at Port Moresby International Airport (PMIA), and enhance air navigation and weather services by installing a standard automatic weather observation system. Four rural airstrips is being upgraded to an all-weather standard to explore (i) the economic potential of agricultural and fisheries exports, and tourism; and (ii) the attractiveness of nearby areas to airline operators.



## Tuvalu

### Strengthening Domestic Shipping Project (2022)

\$30 million grant to replace the existing passenger and cargo ship “Manu Folau” with a reliable and safe ship “Manu Sina”. The project also rehabilitates port auxiliary infrastructure (fenders) and builds the operation and maintenance capacity of the Ministry of Transport, Energy and Tourism to ensure the sustainability of the investment.

2024年7月 進水式（大分県佐伯市）

2025年3月 引渡し式典（大分県佐伯市）

2025年4月 ツバル到着式典







# Opportunities – Pacific Region

## Lending Pipeline, 2025 to 2027

Country	Project Name	ADB Amount (\$ million)
PNG	Mountainous Road Improvement and Resilience Project	200-400
PNG	Transport Project Readiness Facility	65
PNG	Civil Aviation Investment Project Phase 3	325
FSM	Transport Project Readiness Facility	4
FSM	Sustainable Roads Infrastructure Investment Project (Phase 2)	15
SOL	Transport Project Readiness Facility	4
SOL	Land and Maritime Connectivity Project, Tranche 3	52
SAM	Land Transport Connectivity Project	20
FIJ	Critical Bridge Resilience Project Phase 2	100

## Nonlending Pipeline 2025

2 technical assistance in the pipeline for 2025 totaling to \$2.5 million (1 PNG; and 1 NIU).

*Note: Indicative only and subject to changes. Values are rounded.*



# Business opportunities

For details and updates on procurement and consulting services opportunities, please visit:

<https://www.adb.org/business/operational-procurement>

ご清聴ありがとうございました。