

The views expressed in this presentation are the views of the author/s and do not necessarily reflect the views or policies of the Asian Development Bank, or its Board of Governors, or the governments they represent. ADB does not guarantee the accuracy of the data included in this presentation and accepts no responsibility for any consequence of their use. The countries listed in this presentation do not imply any view on ADB's part as to sovereignty or independent status or necessarily conform to ADB's terminology.

ADB

Business Opportunities Seminar

06 October 2021

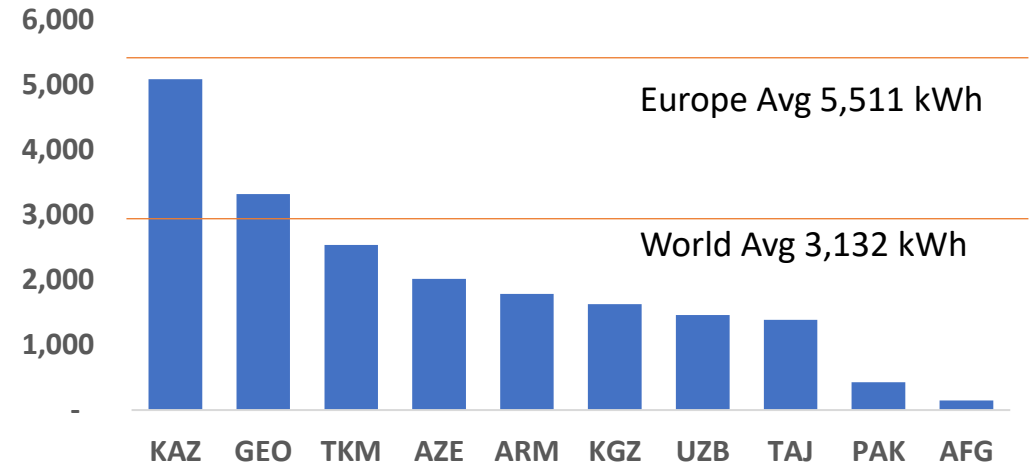
Presented by Catherine B. Santiago
PAU Head, Central West Energy Division

BUSINESS OPPORTUNITIES 

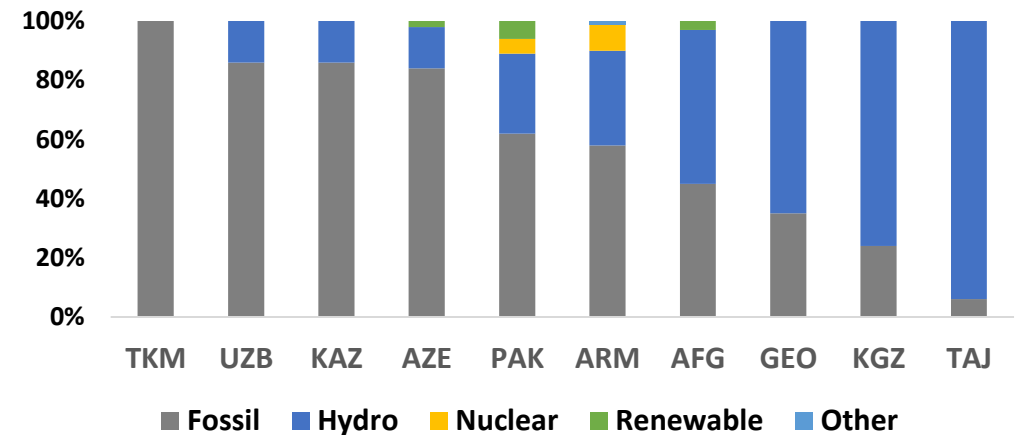
Regional Snapshot



Per Capita Power Consumption (kWh)



Generation Mix (2018)



Great Strides with Remaining Challenges

Region's Characteristics

- Economic downturn and pandemic response depleting state budgets
- Aging/inadequate infrastructure and obsolete technologies (former Soviet countries)
- Uneven distribution of natural resources and heavy reliance on specific fuel type
- Dominant state-control and distorted energy pricing policy
- Weak sector governance and unsustainable SOE management
- Vulnerable to long-term climate change

Remaining Challenges

- **Energy Security** – long-term energy security, vulnerable to seasonality,
- **Energy Access** – Last mile energy access with prioritization of quality
- **Energy Efficiency** – Prevailing inefficiency in energy supply chain, and demand side
- **Sector Sustainability** – Weak financial performance, limited private investment
- **Climate Response** – challenges posed by climate change and policy shift
- **Regional Integration** – energy sharing to boost energy security

Opportunities for Intervention

Modernization of Critical Infrastructure	Replacement, rehabilitation and modernization of transmission and distribution; stronger intervention in distribution network
Market-Oriented Reform	Liberalized market structure with larger private investment; modern management system and cost reflective tariff;
Energy efficiency	Modernization of supply chain; use of smart-metering infrastructure; intervention in targeted area
Mobilizing Private Investment	Policy and regulatory framework reform; incentive mechanisms; business model development; pilot projects
Regional Energy Sharing	Revitalizing CAPS; strengthen CAREC platform for regional energy cooperation; coordination with other development partners

Lending Pipeline, 2021-2022

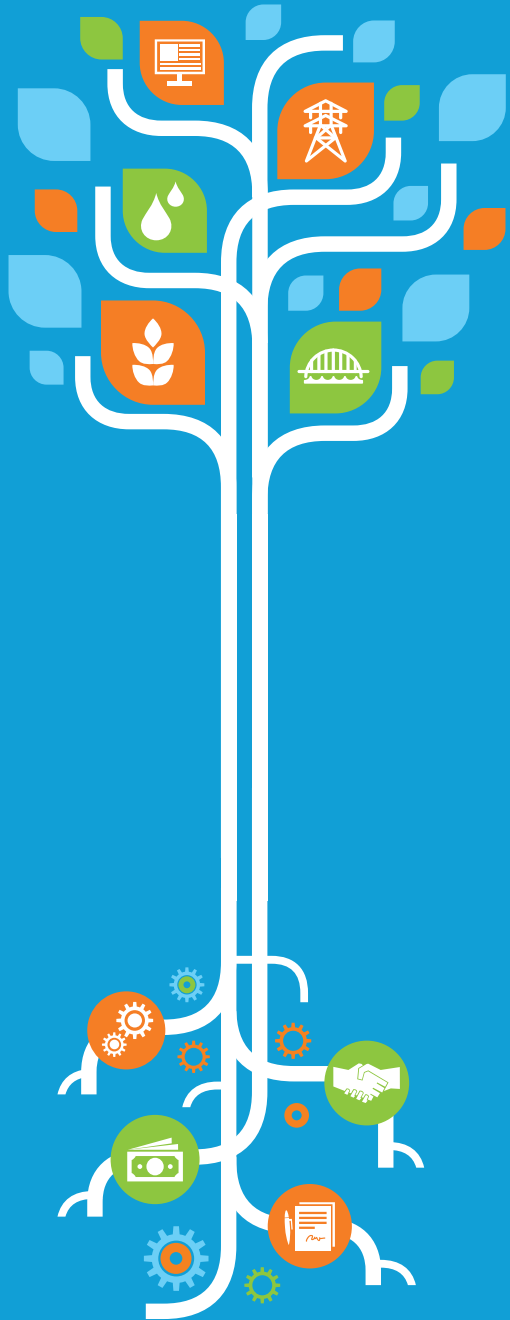
Project Name	Country	Type	Amount (US\$ in Millions)	Contact
<i>Approval year: 2021</i>				
KazTransGasAdvanced Gas Metering Project	KAZ	Project	100	L. Mtchedlishvili
Urban Transport Electrification Project (formerly Promotion of Electric Buses in Bishkek)	KGZ	Project	51	J. Vogel
Balakot Hydropower Development	PAK	Project	580	A. Tareen
Energy Sector Reforms and Financial Sustainability Program, Subprogram 2	PAK	PBL	300	K. Hewitt
Solar Public-Private Partnership Investment Program	UZB	PCG	10	SD Kim
Zarafshan Wind Project	UZB	PCG	20	SD Kim

Nonlending Pipeline, 2021-2022

Project Name	Country	Type	Amount (US\$ '000)	Contact
<i>Approval year: 2021</i>				
TA 9756 Preparing Sustainable Energy Projects (additional financing)	PAK	TRTA	800	A. Aleem
- Implementation of Renewable Energy Policy (\$0.7M), IFB date: Q1 2022				
Gas Storage Sector Development Project	PAK	KSTA	600	A. Aleem
- Policy Advisory for Gas Storage Development in PAK; (\$0.5m), IFB date: Q1 2022				
TA 9672 Developing an Electricity Market	PAK	KSTA	500	A. Aleem
TA 6540 Fostering Expanded Regional Electricity Interconnection and Trade under the CAREC Energy Strategy 2030	Regional	KSTA	400	S. Abado
Turkmenistan Renewable Energy and Energy Efficiency Project	TKM	TRTA	2,000	S. Hasnie
TA 6787- Power Sector Reform Support Program Energy Sector Reform Program)	UZB	TRTA	1,800	S.D. Kim
- Firm recruitment: Distribution Network Development Master Plan (\$1.24M)				

Upcoming major contracts, 2021-2022

Loan/Grant Funded Projects				
Project	Description	Amount (\$Mn)	Contract Type	Projected Advertisement Award Date
KGZ - 54123	Supply and Delivery of Battery Electric Bus (BEB) Fleet and Supply and Installation of Charging Infrastructure , \$40M	40	OCB: Goods	Q4 2021
	Civil Works: Bus Pilot Corridor	5.5	OCB: Works	Q3 2023
	Civil Works: Bus Depot	5	OCB: Works	Q4 2021
	Construction and Supervision Consultant	1.1	Consulting firm	Q4 2021
	Management of Urban Mobility and Bus Operations	2.2	Consulting firm	Q4 2021
KGZ - 3378	Dredging equipment and related services	3	RFQ: Goods	Q4 2021
	Sector Reform	0.5	Consulting firm	Q4 2021
PAK - 4057	Community Development Program - support/development program as part of the Gender Action Plan	0.7	Consulting firm	Q3 2022
PAK	Design, Supply, Install and Commissioning of 500kV Double Circuit Transmission Line	180	OCB: EPC	Q1 2022
	Detailed design and Preparation of Bid Docs for Large Hydro Projects PAK	10	Consulting firm	Q2 2022
TAJ - 0777	Sector reform support consultant	2.5	Consulting firm	Q4 2021
TKM	Concentrating Solar Power, 2 packages	400	OCB: EPC	Q4 2021
	Project Implementation Consultant	3	Consulting firm	Q3 2022
UZB - 3285	220 kV substation Zafarobod and two 220 kV transmission lines “ Syrdarya TPP-Substation Zafarobod	35	OCB: EPC	Q1 2022
UZB	Transmission Project for UZB	150 (TBD)	OCB: EPC	Q2-2022



THANK YOU!

Catherine B. Santiago
PAU Head, Central West Energy Division
cbsantiago@adb.org