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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

Energy Sector

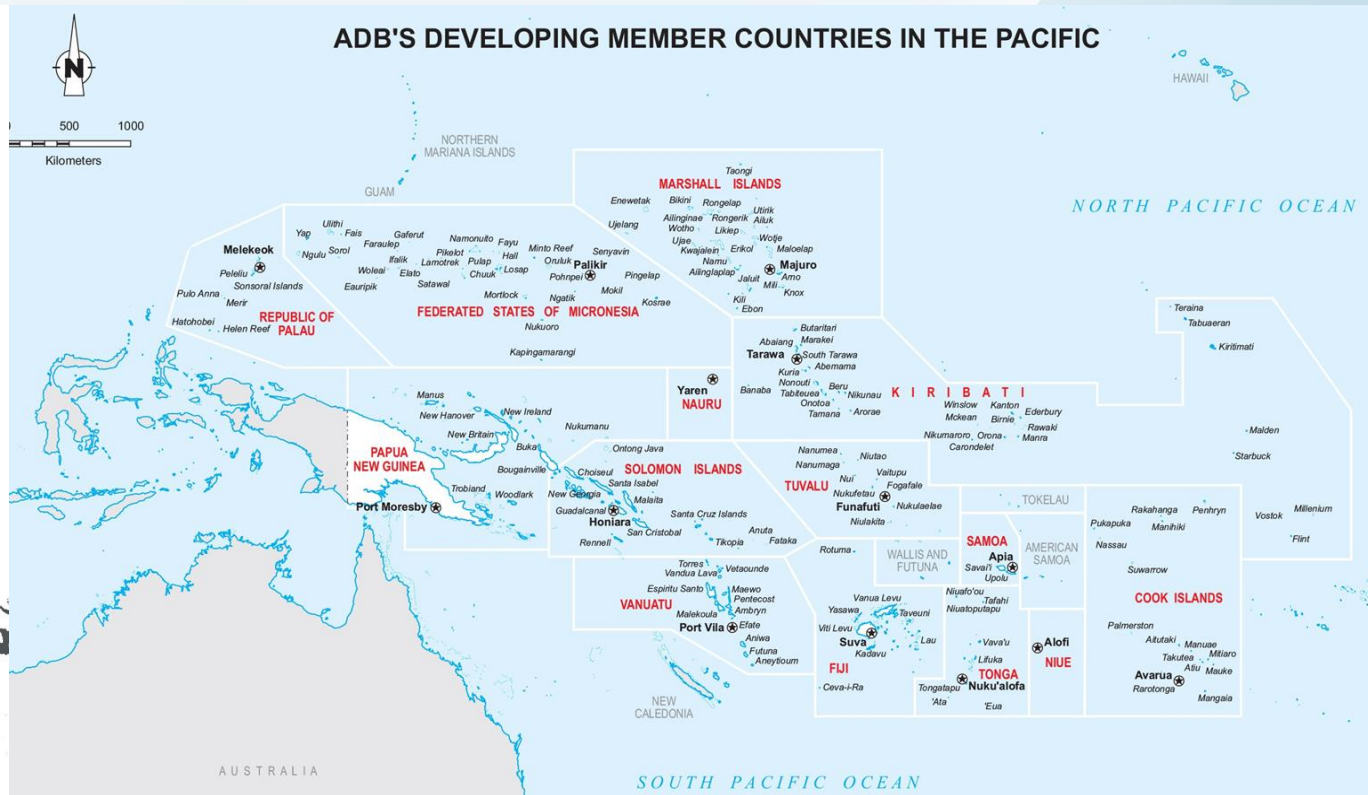
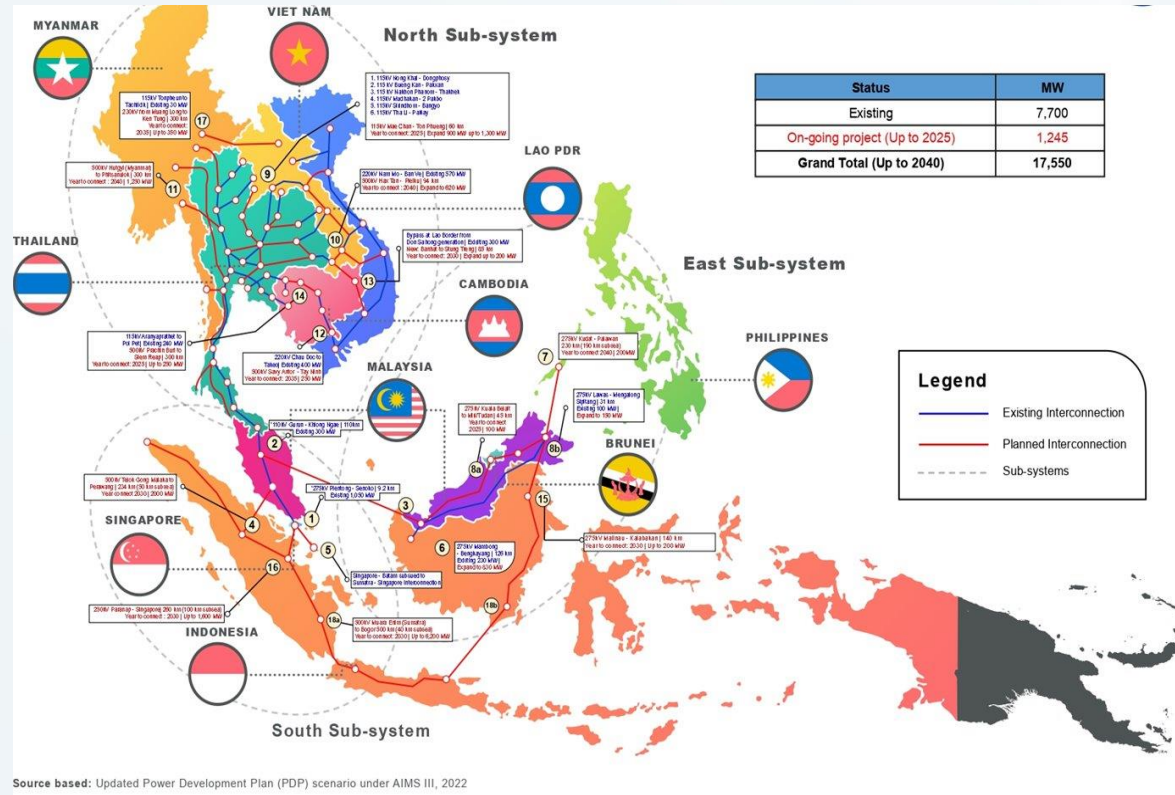
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SOUTHEAST ASIA AND THE PACIFIC
9 OCTOBER 2024



Region/Country Strategy

❖ Southeast Asia

❖ Pacific





Priority Areas

- ❖ Transmission and distribution
- ❖ Geothermal
- ❖ Hydropower
- ❖ Offshore wind
- ❖ Solar PV
- ❖ Battery energy storage system
- ❖ Energy utility services
- ❖ Access to energy solutions
- ❖ Electricity market development
- ❖ Regional interconnectivity





Highlights

- ❖ **Indonesia:** \$2 billion pipeline for hydropower, geothermal, transmission, policy support
- ❖ **Philippines:** \$3 billion pipeline for geothermal, offshore wind (port), energy efficiency and conservation, climate change policy support, and off grid electrification, transmission
- ❖ **Fiji Islands:** \$40 million pipeline for Viti Levu Green Circuit Project
- ❖ **ASEAN Power Grid.** over \$17 billion pipeline for 18 cross-border interconnectors in Southeast Asia
- ❖ **Pacific (14 DMCs):** \$0.5 billion pipeline for energy transition with focus on renewable energy integration into the grid, climate adaptation, sector reform, energy access, and capacity development



Lending Pipeline for Southeast Asia, 2024-2026

Cambodia (\$100 million)

- Grid Expansion for the Energy Transition Project (\$50m, 2025)
- Energy Transition Sector Development Program, Subprogram 2 (\$50m, 2025)

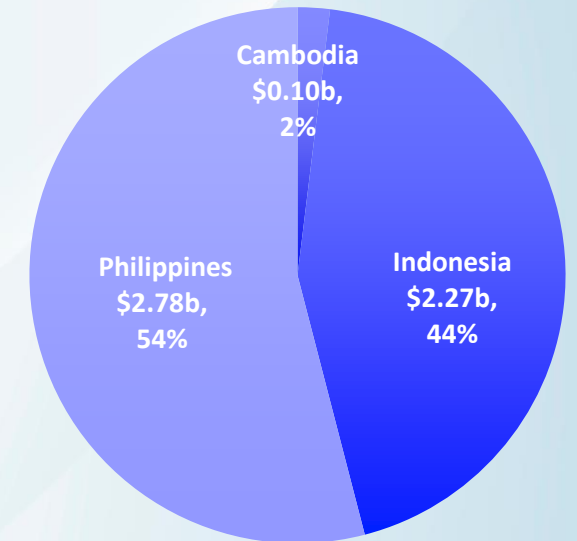
Indonesia (\$2.27 billion)

- Affordable and Sustainable Energy Transition Program, SP1 (\$500m, 2024)
- Accelerating Indonesia's Clean Energy Transition Program, Phase 1 (\$470m, 2024)
- Geothermal Power Generation Project, AF (\$180m, 2024)
- Hydro Power Project (\$15m, 2025)
- Affordable and Sustainable Energy Transition Program, SP2 (\$500m, 2026)
- Renewable Grid Strengthening Project (\$300m, 2026)
- Geothermal Power Expansion Project (\$300m, 2026)

Philippines (\$2.78 billion)

- Climate Change Action Program, Subprogram 2 (\$500m, 2024)
- Geothermal Resource Derisking Facility (\$250m, 2025)
- Offshore Wind Port Development Project (\$300m, 2025)
- National Total Electrification Support Program (\$461m, 2026)
- Energy Efficiency and Conservation Support Program (\$500m, 2026)
- Climate Change Action Program, Subprogram 3 (\$650m, 2026)
- Smart and Green Transmission Project (\$120m, 2027)

**Total of \$5.15 billion
(16 projects)**





Lending and Grant Pipeline for the Pacific, 2024-2026

Fiji Islands (\$40 million)

- Viti Levu Green Circuit Project (\$40m, 2026)

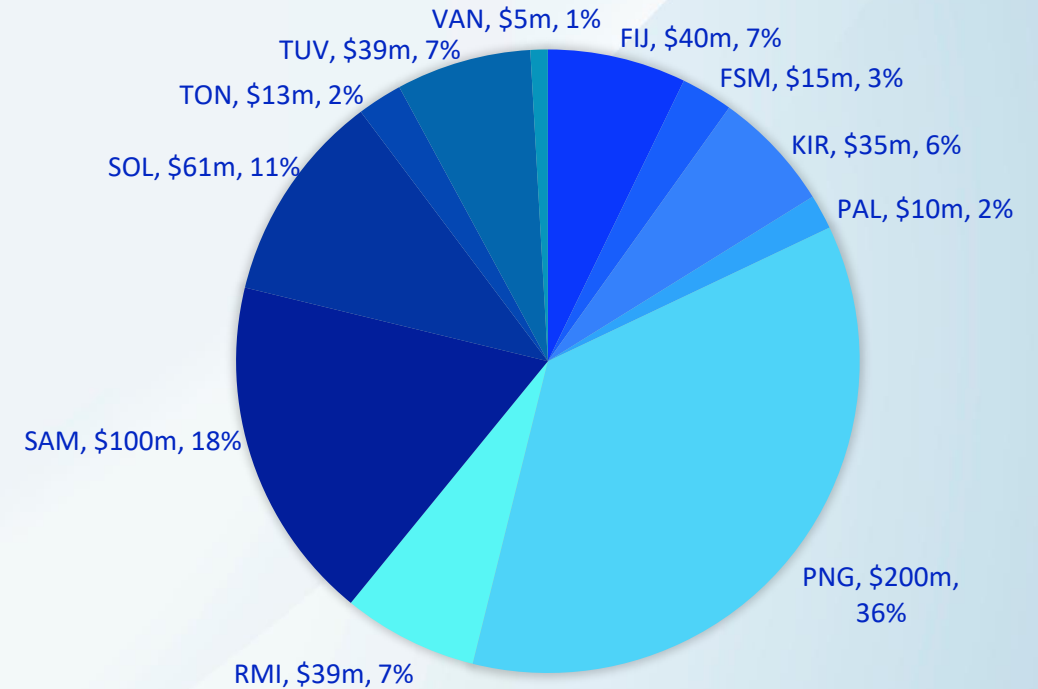
Papua New Guinea (\$200 million)

- Sustainable Energy Sector Development Program, SP1 (\$100m, 2025)
- Sustainable Energy Sector Development Program, SP2 (\$100m, 2026)

Small Islands Pacific DMCs (\$317 million)

- FSM: Climate Resilient Energy and Water Sector Project (\$15m, 2024)
- KIR: South Tarawa Renewable Energy Project, Phase 2 (\$25m, 2024)
- KIR: South Tarawa Renewable Energy Project, Phase 2 (\$10m, 2026)
- PAL: Energy Transition Project (\$10m, 2024)
- RMI: Energy Transition Project (\$19m, 2024)
- RMI: Energy Transition Project, Phase 2 (\$20m, 2026)
- SAM: Alaoa Multipurpose Dam Project (\$100m, 2024)
- SOL: Renewable Energy Development Project (\$15m, 2024)
- SOL: Tina River Hydropower Project (\$40m, 2025)
- SOL: Disaster Resilient Clean Energy Financing (\$1m, 2026)
- SOL: Accelerating Solar Powered Sustainable Water Supply Services (\$5m, 2026)
- TON: Grid Enhancement for Sustainable Energy Transition Project (\$1m, 2024)
- TON: Integrated Sustainable and Resilient Power Sector Project (\$12m, 2026)
- TUV: Increasing Access to Renewable Energy Project, 2nd AF (\$9m, 2024)
- TUV: Increasing Access to Renewable Energy Project, 3rd AF (\$30m, 2026)
- VAN: Disaster Resilient Renewable Energy Development Project (\$5m, 2025)

**Total of \$557 million
(19 projects)**





Nonlending Pipeline for Southeast Asia and the Pacific, 2024-2025

Total of \$30 million (17 technical assistance)

Southeast Asia (\$18.50 million)

2024

- LAO: Power Sector Reform for Enhancing Fiscal Sustainability (\$3.25m)
- PHI: Supporting Offshore Wind Port Development Planning (\$0.40m)
- PHI: Energy Transition Support Program (\$2.85m)
- REG: Southeast Asia Energy Sector Development Investment Planning & Cap Building Facility, Phase 2 (AF), (\$0.75m)
- REG: Advancing Energy Transition and Regional Power Trade in Southeast Asia, (\$3.90m)

2025

- CAM: Supporting the Energy Transition SDP (\$1.8m)
- INO: Accelerating Sustainable and Climate Resilient Infrastructure Development in Indonesia (\$5.50m)

Pacific (\$7.35 million)

2024

- NIU: Clean and Resilient Energy Development Support (\$0.70m)
- SOL: Preparing the Accelerating Solar Powered Sustainable Water Supply Services Project (\$0.225m)
- VAN: Promoting Sustainable and Climate Resilient Clean Investments in Vanuatu (\$0.225m)
- REG: Preparing Clean and Renewable energy Investments in the Pacific (AF) (\$1.70m)
- REG: Preparing the Pacific Renewable Energy Investment Facility, Phase 3 (AF) (\$1.0m)
- REG: Development of the Pacific Energy Regulators Alliance (AF) (\$0.50m)

2025

- KIR: Preparing the South Tarawa Renewable Energy Project, Phase 3 (\$1.00m)
- TON: Preparing the Integrated Sustainable and Resilient Power Sector Project (\$1.00m)
- TUV: Preparing the Increasing Access to Renewable Energy Project (AF) (\$1.00m)

Multiregion: Pacific, South Asia, Southeast Asia (\$3.80 million)

2024

- REG: Supporting the Energy Transition (\$3.80m)



Opportunities

- ❖ Turnkey: transmission | geothermal | BESS | hydropower
- ❖ Equipment supply: transmission
- ❖ Consulting services: grid assessments, master plan, feasibility studies, due diligence support, project supervision, capacity development and complementarity



Issues/Challenges

(Southeast Asia)

- ❖ How to ensure high project readiness for large and complex infrastructure projects?
 - Use of project readiness facility and a phased approach | cofinancing
- ❖ How to effectively design a project with multiple small subprojects?
 - Use of results-based lending | cofinancing |

(Pacific)

- ❖ How to attract competent quality consultants and contractors at a reasonable price when the government capacity is low, the project sites are remote and scattered, the contract size is limited?
 - Bundling procurement across the region | Project programming consolidation | Capacity complementation | Roadshow | Project replicability and scalability | Funding allocation |
- ❖ How to augment and sustain project impacts when demand may be limited, operation and maintenance capacity is limited?
 - O&M management contract | Promoting productive use of energy |



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Thank you!

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