

*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.*

# Transport Sector Operations

14 January 2025

The ADB logo consists of the letters 'ADB' in a white, serif font, centered within a dark blue square. The background of the slide features a large, stylized graphic of four overlapping chevrons pointing to the right, in shades of green, red, yellow, and light blue, set against a blue background with white diagonal lines.

ADB



## Vision

- To **mobilize efficient, clean, and resilient** integrated multimodal transport and logistics systems for safe mobility for all

## Key Opportunities

- Physical and digital integration of modes as part of a managed transport ecosystem
- Transformative pathways to low carbon transport systems: shift to low-carbon and energy-efficient modes and e-mobility
- Green and digital logistics for international gateways (sea and land)
- Private-sector financing for complex solutions, operations & maintenance, logistics centers, and transit-oriented development



# Key Trends and Challenges

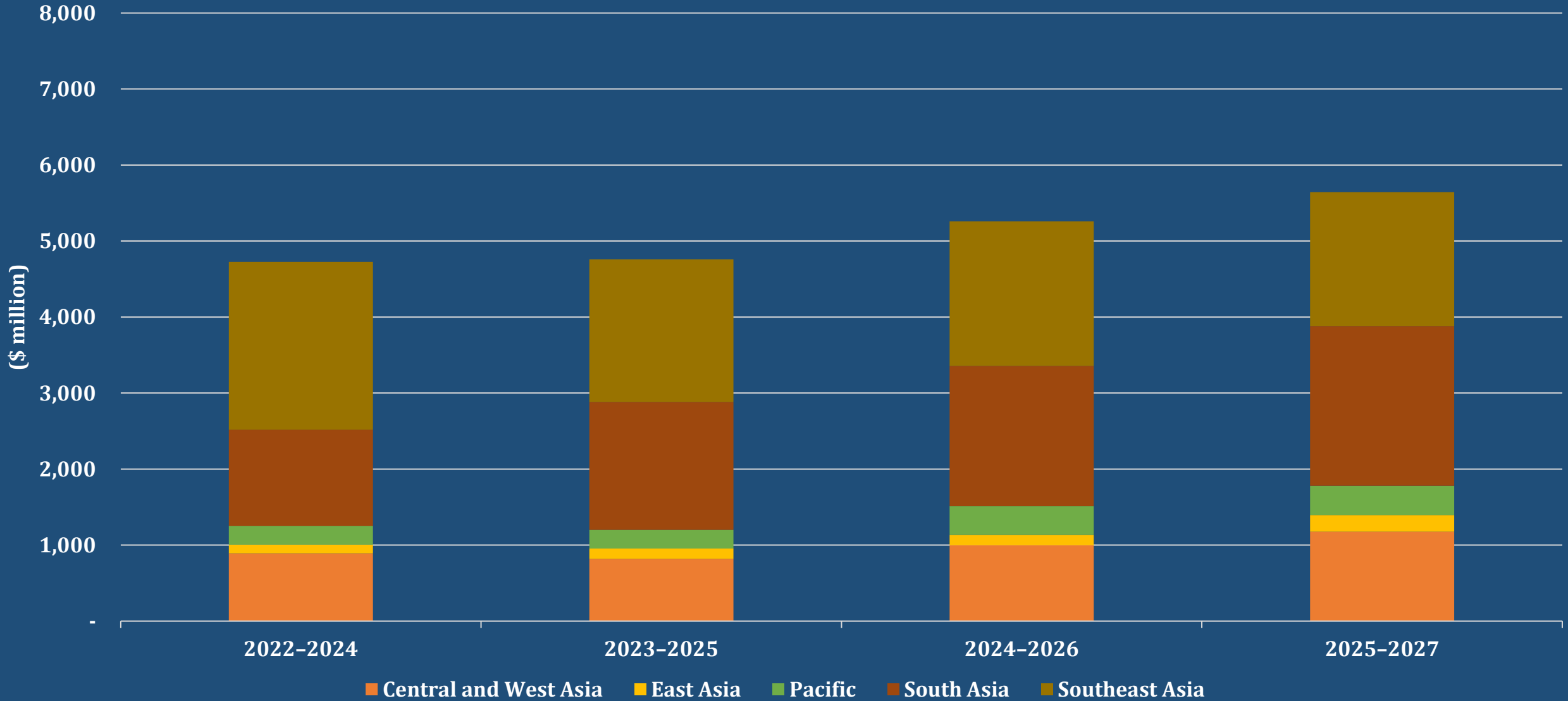
- \$560 billion annual transport infrastructure investment needed for connectivity\*
- Increasing emissions of greenhouse gases and climate and disaster impacts
- Environmental hazards and risks of aging transport infrastructure
- Fastest rates of urbanization in the world, rising inequalities, home to 7 of 10 largest megacities, high traffic congestion, 60% of global road crash fatalities
- Rapidly growing digital economy and infrastructure, smartphone ownership, e-commerce, and availability of real-time information
- Major supplier to global markets – with 45% of global export flows produced in the region by 2050

\*Asian Development Bank (2017). Meeting Asia's Infrastructure Needs, Manila.



# Commitments (SOV)

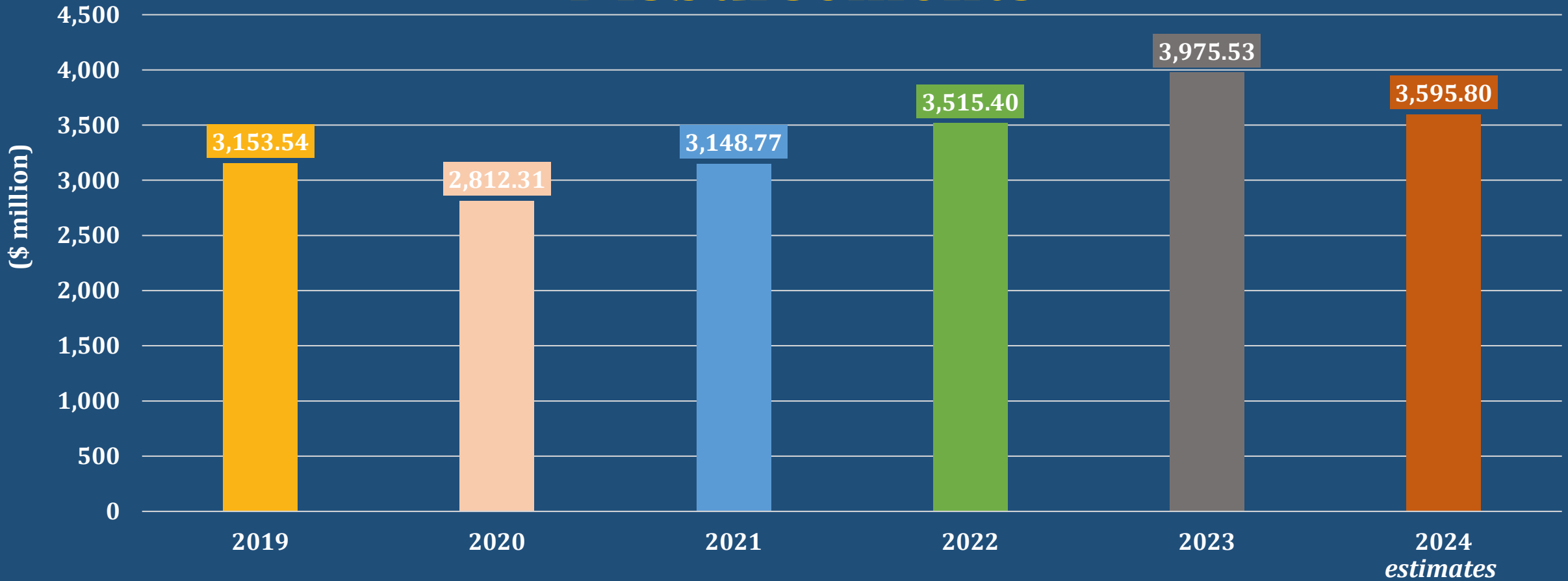
## Loans and Grants (2022 to 2027): 3-Year Moving Average



Note: ADB financing only.

PUBLIC. This information is being disclosed to the public in accordance with ADB's Access to Information Policy.

# Disbursements



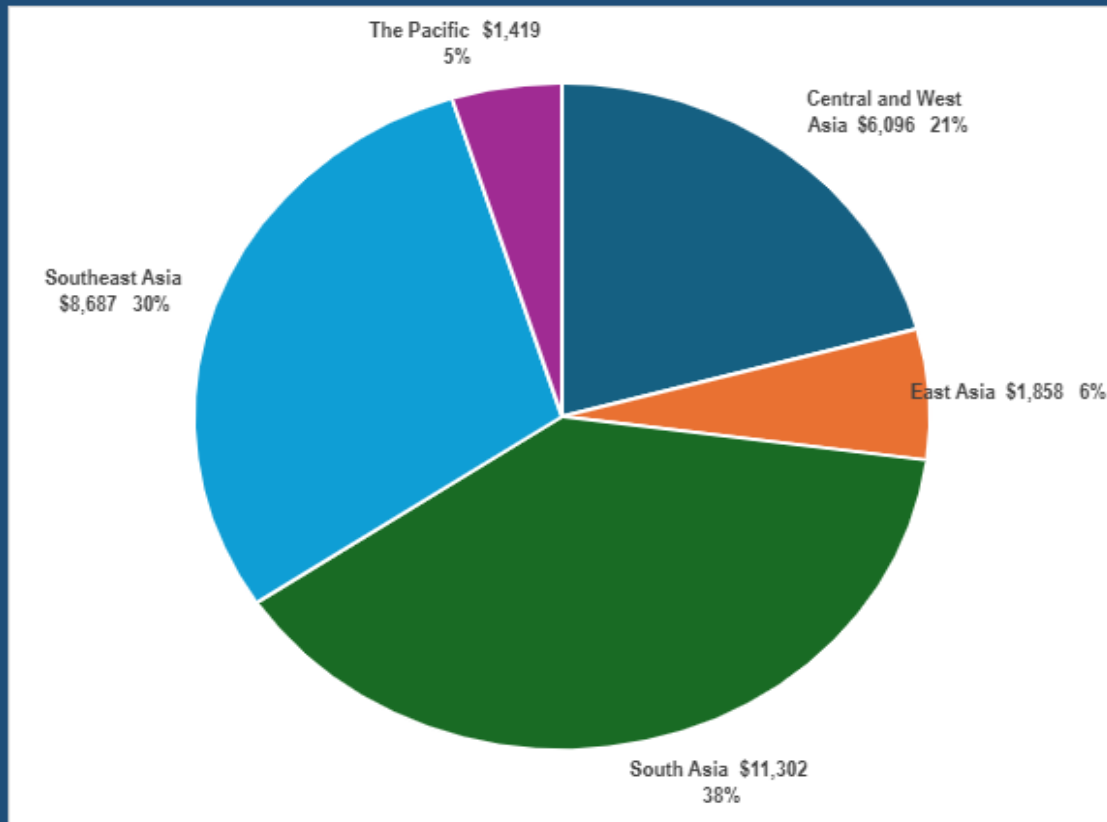
Notes:  
2019-2023: actual disbursement figures. 2024: estimated disbursement as of Sep 2024.



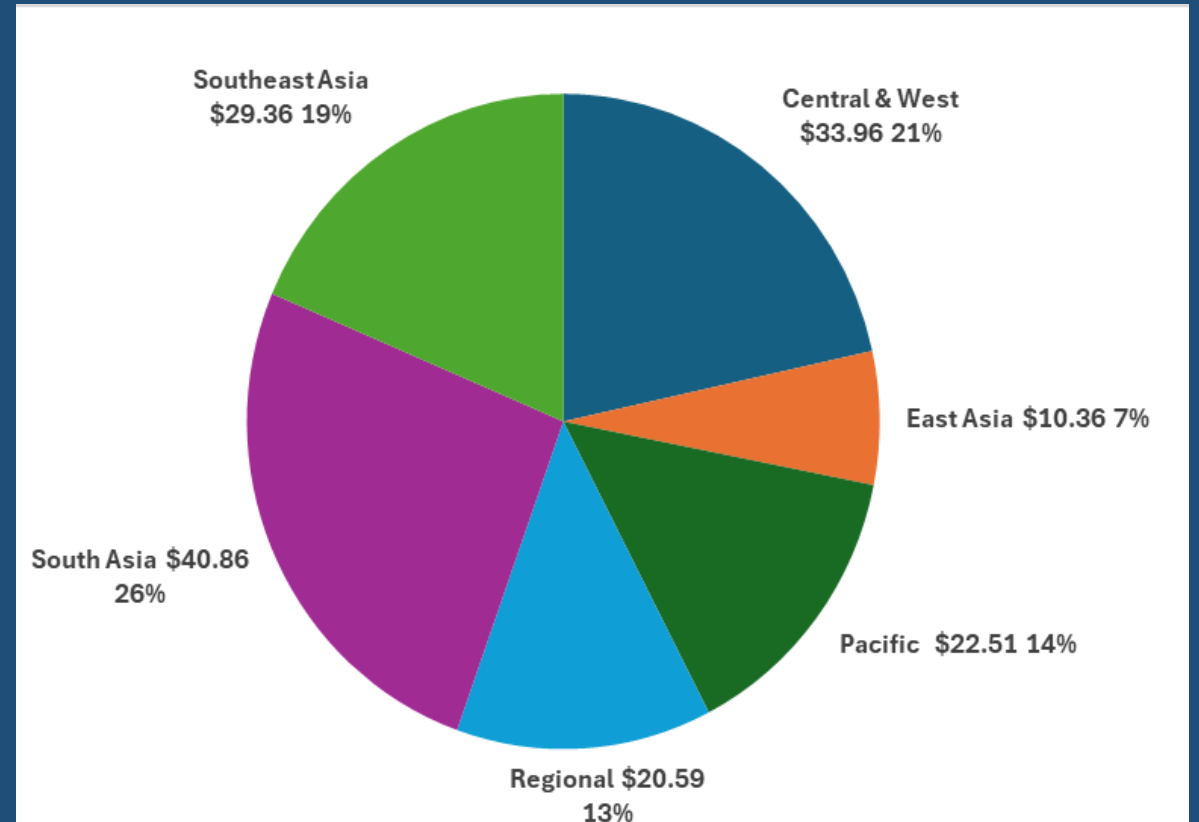
# Active Loans, Grants, and TAs

(as of September 2024)

## Loans and Grants Project (Total \$29 billion)



## Technical Assistance (Total \$158 million)

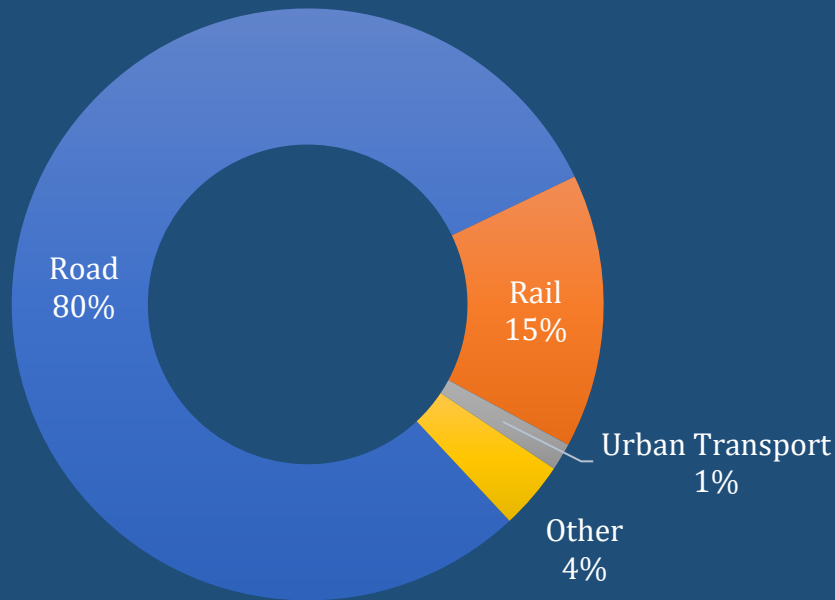




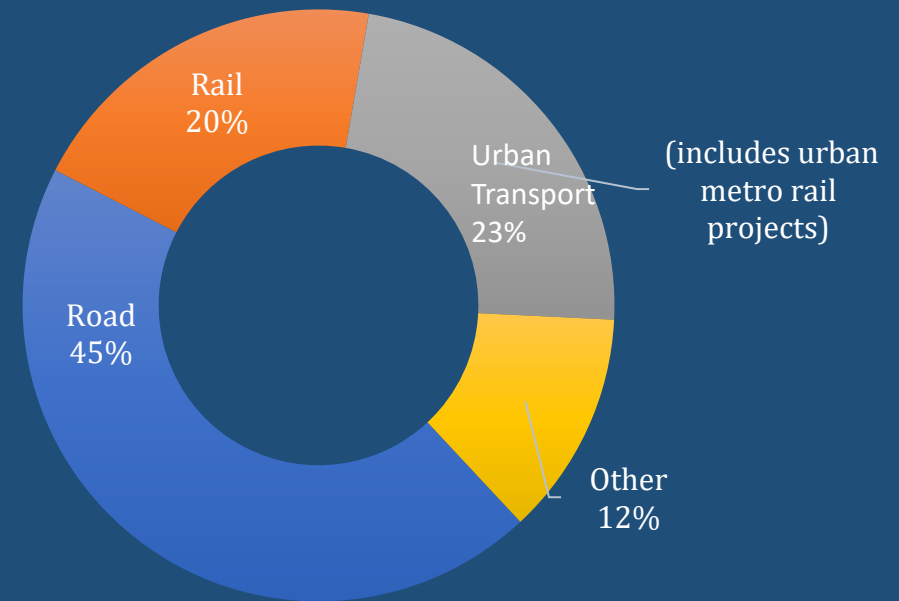
# Climate Financing (SOV)

Transport climate finance of \$5 billion in 2020 **more than doubled to \$10.9 billion** by 2023 and is projected to reach \$25 billion by 2030, supported by **significant subsector assistance shift**

### Transport Sector in 2010



### Transport Sector in 2023



Subsector categorization based on eOps



# Climate Change Shift

Developing projects in innovative areas to enhance TRA climate impact

- mass transit
- greening railways
- maritime decarbonization
- new fuels (hydrogen, sustainable aviation fuel)
- system electrification
- urban e-mobility





# Knowledge Highlights

- Asia and the Pacific Transport Forum 2024: *Clean Transport for All (14-17 May 2024 in Manila )*
- ADB Annual Meeting Seminar: *Driving E-mobility in Developing Asia and the Pacific (3 May 2024 in Tbilisi)*
- Asia Pacific Road Safety Observatory Annual Meeting and Study Tour: *Safe and Sustainable Urban Road Transport (8-9 October 2024 in Tokyo)*
- High-Level 16<sup>th</sup> Regional Environmentally Sustainable Transport Forum *(10-12 December 2024 in Manila)*
- Webinar Series on (i) E-Mobility and (ii) Green Roads

# Focus on Project Readiness

- **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 Pipelines and Business Opportunities

# Opportunities – Central & West Asia Region

## Lending Pipeline, 2025 to 2027 (1/4)

Country	Project Name	Value (\$m)
AFG	Community-Connectivity Project	50.0
ARM	Resilient and Inclusive Economic Corridor Improvement Project II	130.0
ARM	Empowering Mobility through Electric Urban Solutions	160.0
AZE	Rehabilitation of Railway Network Project, Phase 1 (Alat-Osmanli segment)	120.0
AZE	Baku EcoMobility Project	150.0
GEO	Multisector Small Expenditure Financing Facility (Activity 1)	2.5
GEO	Batumi-Sarpi Road Project	250.0
GEO	Railway Sector Reform Program, Subprogram 1	25.0
GEO	Georgia EcoMobility Project	50.0
GEO	Multisector Small Expenditure Financing Facility (Activity 5)	3.5
KAZ	CAREC Corridors 3 and 6 Construction and Operation of Turkistan Oblast Highway (Saryagash Bypass) Project	800.0

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



# Opportunities – Central & West Asia Region

## Lending Pipeline, 2025 to 2027 (2/4)

Country	Project Name	Value (\$m)
KAZ	CAREC Corridors 3 and 6 Construction and Operation of Turkistan Oblast Highway (Saryagash Bypass) Project	800.0
KAZ	Innovative Solutions for Road Maintenance Sustainability Project	30.0
KAZ	Pilot of Performance-Based Maintenance Contract	15.0
KAZ	Installation of Automated Load Measurement Systems for Stations on National Roads of Kazakhstan	15.0
KGZ	Almaty-Bishkek Economic Corridor: Regional Improvement of Border Services Project	30.5
KGZ	Transport Development Project (BCP / Railway) (Activity 6)	1.5
PAK	CAREC Corridor Development Investment Program (MFF, tranche 4)	75.0
PAK	CAREC Regional Improving Border Services Project (additional financing)	25.0
PAK	Punjab Sustainable Urban Mobility Projects Preparation	15.0
PAK	CAREC Integrated Transport Improvement (Hyderabad Southern Bypass)	100.0
PAK	Karachi BRT Brown Line Project-PRF	10.0

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

# Opportunities – Central & West Asia Region

## Lending Pipeline, 2025 to 2026 (3/4)

Country	Project Name	Value (\$m)
PAK	Khyber Pakhtunkhwa Sustainable Urban Mobility	10.0
PAK	Green Public Transport in Khyber Pakhtunkhwa Cities	100.0
PAK	Railway Improvement Project	10.0
PAK	Karachi BRT Red Line Project- Additional Financing	100.0
TAJ	Transport Project Readiness Financing (PRF) or Small Expenditure Financing Facility (SEFF)	12.0
TAJ	Dushanbe EcoMobility Project 1	30.0
TKM	TransTurkmenistan Railway Modernization Project (Phase 1, Ashgabat-Dushak)	400.0
TKM	TransTurkmenistan Railway Modernization Project (Phase 2, Mary-Dushak)	452.4

MFF=Multi-Tranche financing facility; PBL=Policy-based lending; PRF=Project readiness financing; SEFF=Small expenditure financing facility.

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

# Opportunities – Central & West Asia Region

## Lending Pipeline, 2025 to 2027 (4/4)

Country	Project Name	Value (\$m)
UZB	CAREC Corridor 2 (Bukhara-Miskin-Urgench-Khiva) Railway Electrification Project (Additional Financing)	100.0
UZB	CAREC Road Corridor 2 Resilience and Modernization Project	255.0
UZB	CAREC Corridor 6 (Guzar-Karshi-Bukhara, 100 km) Road Modernization Project	250.0
UZB	E-Mobility Development Project	100.0

## Nonlending Pipeline 2025

**13 technical assistance in the pipeline for 2025 totaling to \$11.5 million**  
(1 ARM; 1 AZE; 1 GEO; 1 KAZ; 1 KGZ; 1 PAK; 2 REG; 1 TAJ; 1 TKM; 3 UZB)

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

# Opportunities – East Asia Region

## Lending Pipeline, 2025 to 2027

Country	Project Name	Value (\$m)
MON	Ulaanbaatar Transport Improvement Project 1	60.0
MON	Ulaanbaatar Transport Improvement Project 2	250.0
MON	Regional Road Development and Maintenance Phase 4	150.0
PRC	Anhui Province Green Port and Shipping Demonstration Project	200.0
PRC	Hubei Xianning Low Carbon and Climate Resilient Urban Development Project	150.0

## Nonlending Projects Approved in 2024

There are 2 PRC and 3 Mongolia technical assistance projects approved in 2024 totaling to \$1.7 million.

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



# Opportunities – Pacific Region

## Lending Pipeline, 2025-2027

Country	Project Name	ADB Amount (\$ million)
PNG	Mountainous Road Improvement and Resilience Project	53
PNG	Climate Resilient Transport Project Readiness Facility	30
FSM	Sustainable Roads Infrastructure Investment Project (Phase 2)	15
SOL	Transport Project Readiness Facility	4
PNG	Civil Aviation Development Investment Project Phase 3	190
SOL	Land and Maritime Connectivity Project, Tranche 3	52
SAM	Climate Resilient Land Transport Connectivity Project	20
FIJ	Project Readiness Financing for Green and Climate Resilient Transport Project	10

## 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.*

# Opportunities – South Asia Region

## Lending Pipeline, 2025-2027 (1/3)

Country	Project Name	Amount (\$m)
BAN	Dhaka Mass Rapid Transit Development Investment Project (Line 5, Southern Route) (Tranche 1)	300
BAN	SASEC Dhaka-Northwest Corridor Road Project Phase 2 (Tranche 4)	200
BAN	SASEC Chattogram–Dohazari Railway Project	700
BAN	SASEC Chattogram Port Access Road Improvement Project	135
BAN	SASEC Dhaka-Sylhet Corridor Road Investment Project (Tranche 2)	120
BAN	SASEC Dhaka-Chattogram Highway Improvement Project (Tranche 1)	200
BAN	SASEC South Corridor Improvement Project (Daulatdia-Faridpur-Barishal) (Phase 1) (Tranche 1)	200

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

# Opportunities – South Asia Region

## Lending Pipeline, 2025-2027 (2/3)

Country	Project Name	Amount (\$m)
IND	Delhi-SNB Regional Rapid Transit System Investment Project - Tranche 1	375
IND	Bihar State Highway Project (Phase 4)	200
IND	Indore Metro Rail Project	200
IND	Rolling Stock Operations Enhancement Project for Chennai Metrorail (Phase 1)	197
IND	Maharashtra Climate Smart Connectivity for Inclusive Growth Results Based Lending Program	809
IND	Tripura State Highway Project	150
IND	Manipur State Roads Improvement Project (Project readiness financing)	3.6
IND	Road Sector Development in Tripura (Project readiness financing)	1.5
IND	National e-Bus Program	750
IND	Village Roads, ODR and Minor Bridge in the State of Uttar Pradesh	300

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

## Opportunities – South Asia Region

### Lending Pipeline, 2025-2027 (3/3)

Country	Project Name	Amount (\$m)
BHU	Project Readiness Financing (Transport)	2
BHU	National Highway Expansion Project (Lhamoizingkha-Sarpang)	80
NEP	Sustainable Urban E-Mobility Project	100
NEP	Second SASEC Highway Enhancement Project (Pathlaiya-Narayanghat)	210

### Non-lending Pipeline 2025

**10 technical assistance projects, totaling \$9.75 million**

(2 BAN, 4 IND, 2 NEP, 2 SRI)

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



# Opportunities – Southeast Asia Region

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

Country	Project Name	ADB Amount \$million
CAM	Climate Resilient Network Improvement Project	30
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	Malolos-Clark Railway Project (Tranche 2)	1,450
PHI	Manila Metro Rail Transit Line 4 Project (Tranche 1)	300
PHI	South Commuter Railway Project, Tranche 2	1,750

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

# Opportunities – Southeast Asia Region

## Lending Pipeline, 2025-2027 (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
THA	Climate-Resilient Connectivity for the Eastern Economic Corridor Project: The Intercity Motorcity Motorway No. 7 (Extension to Link with U-Tapao International Airport)	68.7
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.*

# Business opportunities

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

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

Looking forward to working together!