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# Transport Sector

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Transport Sector Office  
Sectors Department 1



# Current Team Structure (since June 2023)

## Director, Railway & Logistics

- Climate Financing
  - 100% mitigation at a large scale
  - Rolling stock (RS) energy efficiency
  - Cold chain

## Director, Smart Mobility

- Climate Financing
  - E-mobility
  - Energy efficiency (public transport systems, traffic management, intelligent transport system [ITS], etc.)
- Private Financing/New Technology
  - E-vehicles
  - Transit-oriented development, port city
  - Urban logistics
  - ITS/fare collection

## Director, Emerging Areas

- Analytical backing (green mobility, etc.)
- Thematic approach to project development (road safety, asset management, green shipping, etc.)

## Director, Regions

- Central and West Asia
- East Asia
- Pacific (PA)

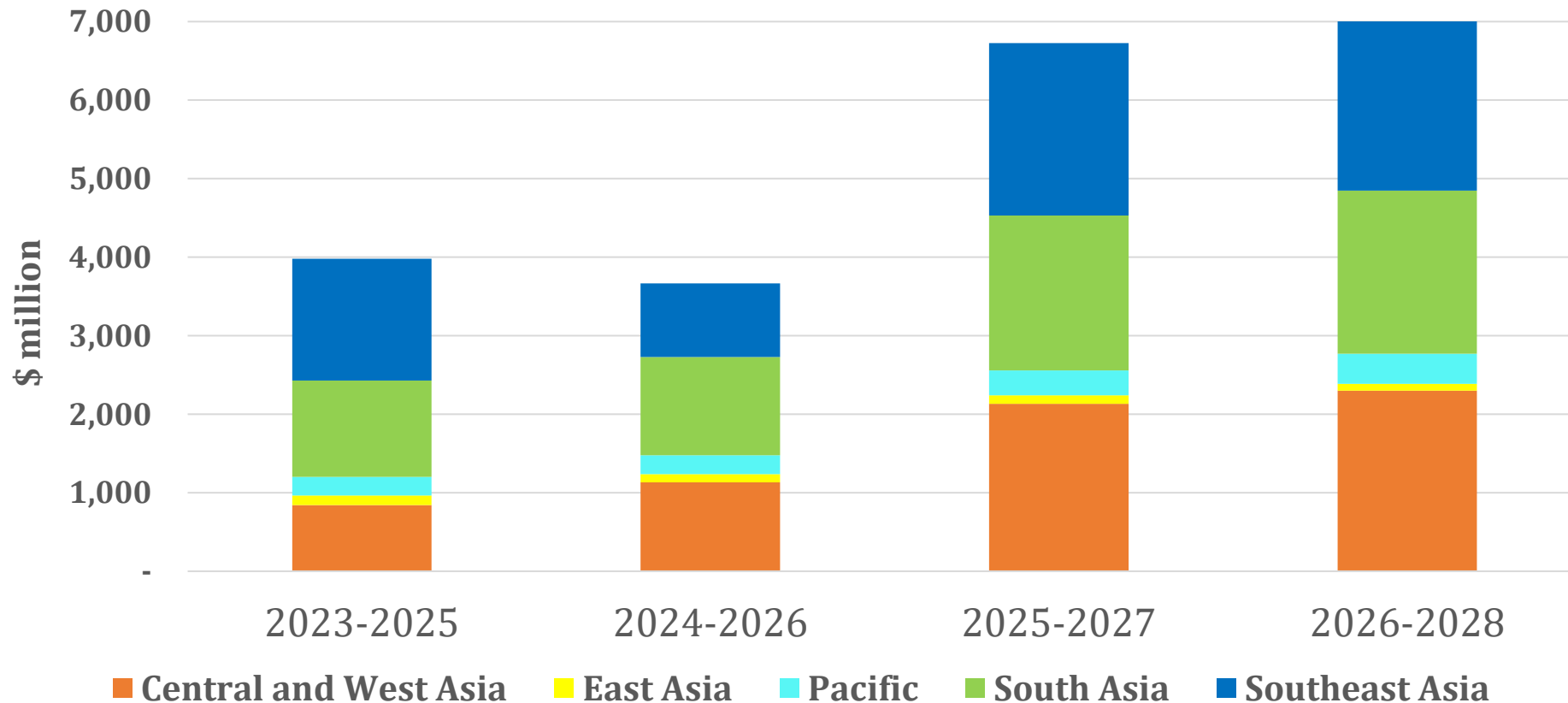
## Director, Regions

- South Asia
- Southeast Asia



# Region-wise Operation Volumes

Loans and Grants (2023 to 2028): 3-Year Moving Average

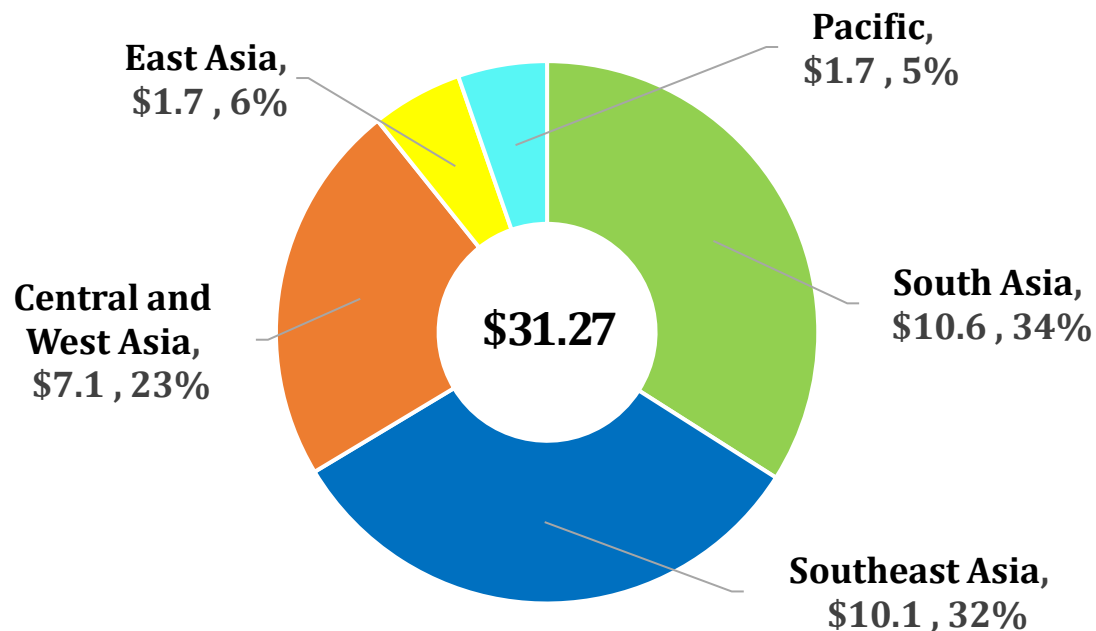


Note: Excluding partially-administered cofinancing. 2020-2025 reflect actual figures. 2026-2028 are planned and confirmed figures from SovOps pipeline data as of 9 March 2026. Excludes facility amounts.



# Active Loans/Grants, and TAs by Region (as of Feb 2026)

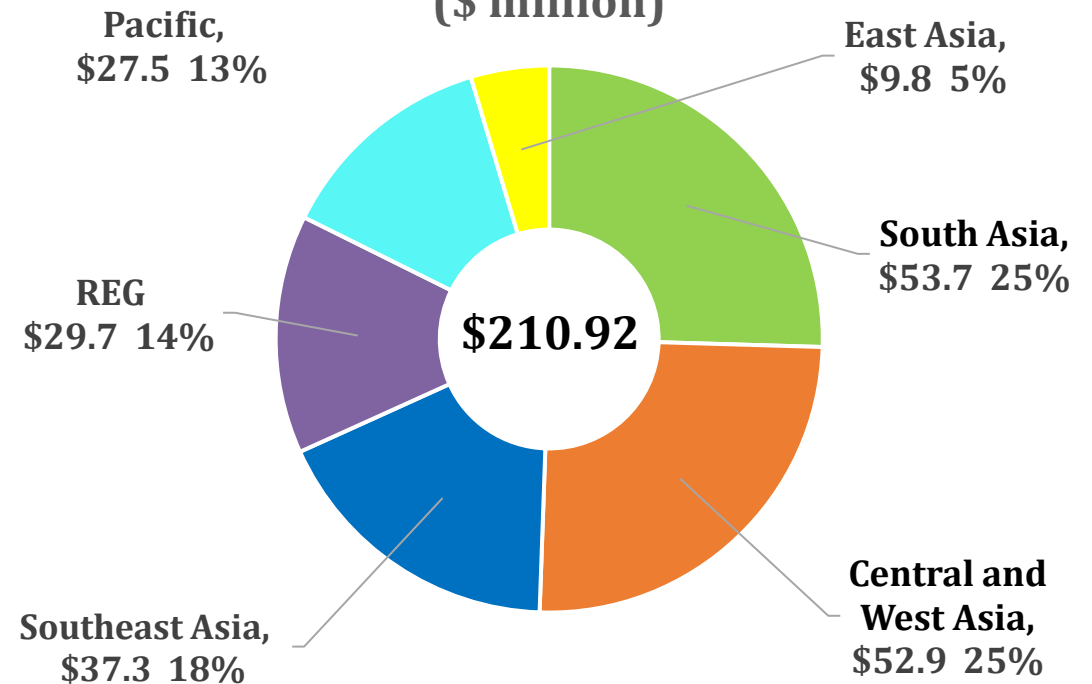
**Active Loans/Grants by Region**  
 (\$ billion)



**Top 5 DMCs**

1. PHI (\$7.3 bil),
2. IND (\$6.0 bil),
3. BAN (\$2.7 bil),
4. PAK (\$2.2 bil),
5. UZB (\$1.3 bil)

**Active TAs by Region**  
 (\$ million)



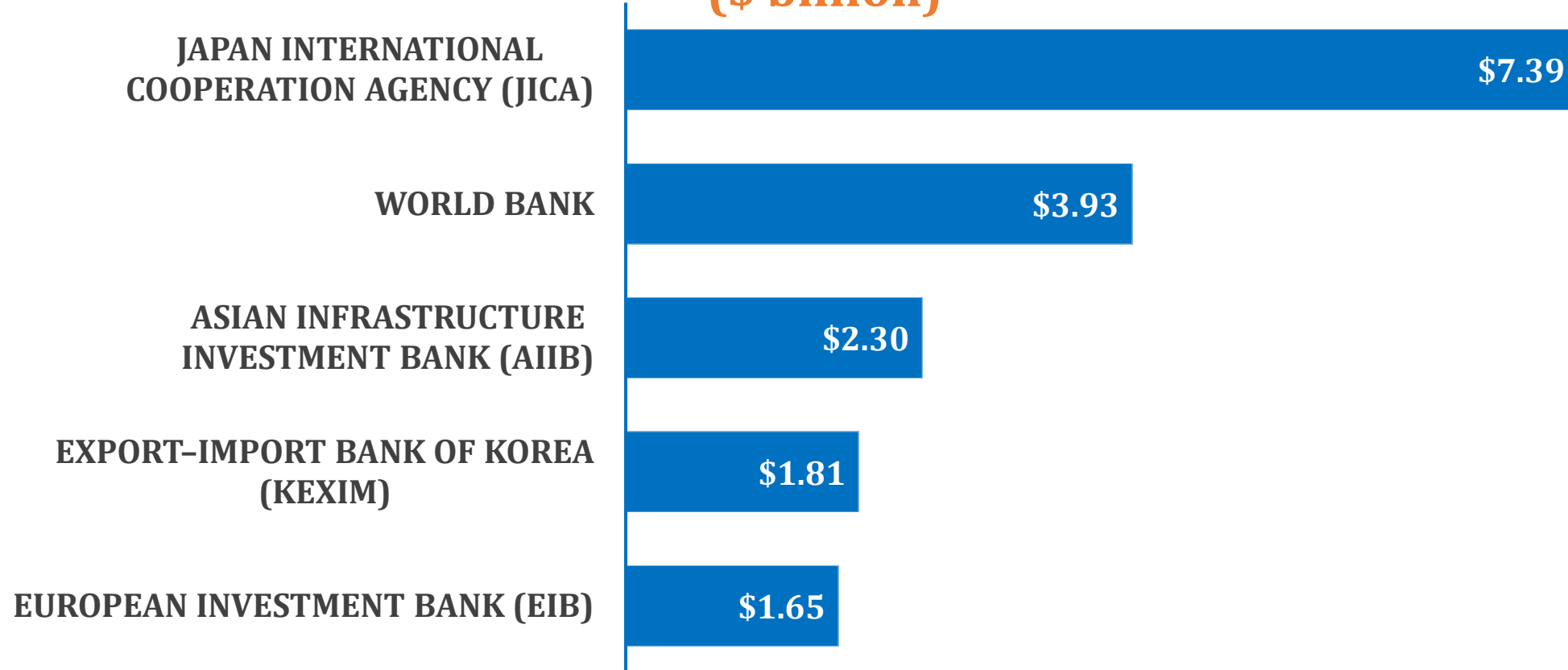
**Top 5 DMCs**

1. BAN (\$16.5 mil),
2. PHI (\$14.5 mil),
3. IND (\$14.4 mil),
4. PAK (\$12.3 mil),
5. PNG (\$10.0 mil)



# Cofinancing with Partner Organizations

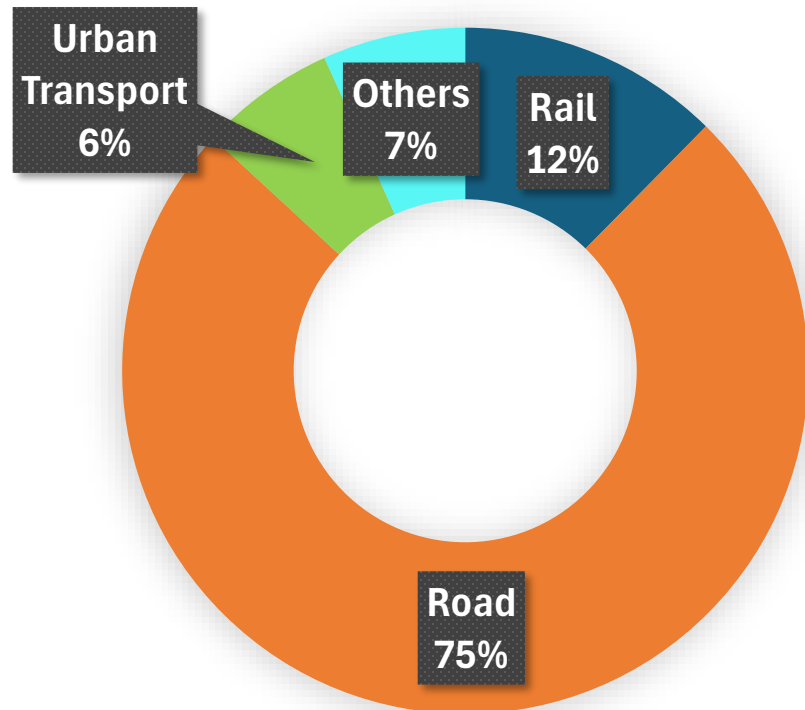
**Top Cofinancing Partners, 1970 to date  
 (\$ billion)**



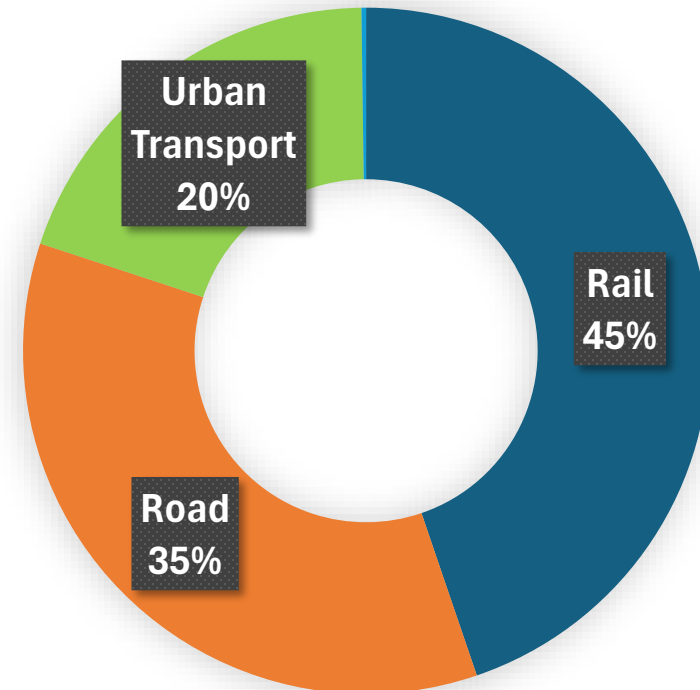


# Subsector shift over years

2010 Commitments by TRA Subsector



2025 Commitments by TRA Subsector





# New and expanding opportunities

- Mass transit
- e-mobility and new modes (e.g., ropeway, e-ferry)
- Urban traffic management and air quality improvement
- Maritime/inland waterways
- New fuels (hydrogen, sustainable aviation fuel)
- System operation efficiency
- System electrification (decarbonization of railways)
- Digitalization and railway signaling for improved operations efficiency
- Regional Cooperation and Integration (RCI) including border-crossing and logistics facilities and capacity development in trade facilitation



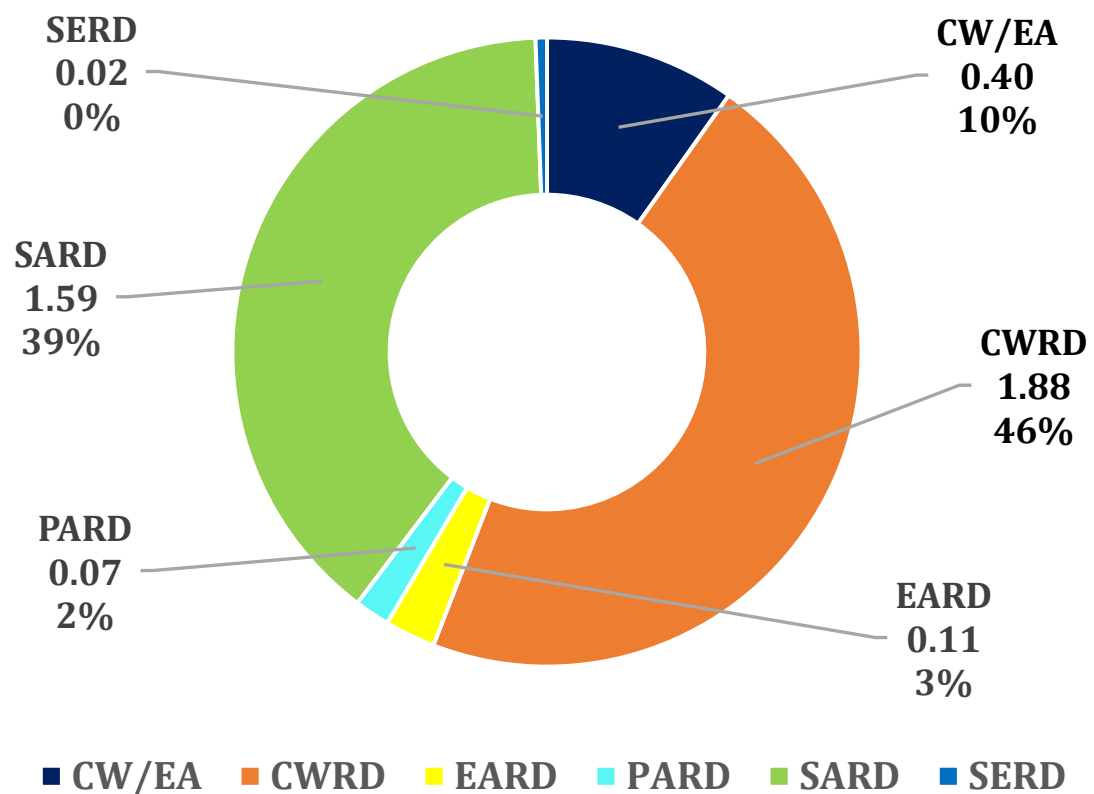
# Private sector opportunities

- E-mobility
- Greening/electrification of port and airport facilities
- Sustainable aviation fuel and other decarbonization measures for aviation
- RCI in cross-border transport/trade facilitation including international freight operators
- Asset management including operations and maintenance

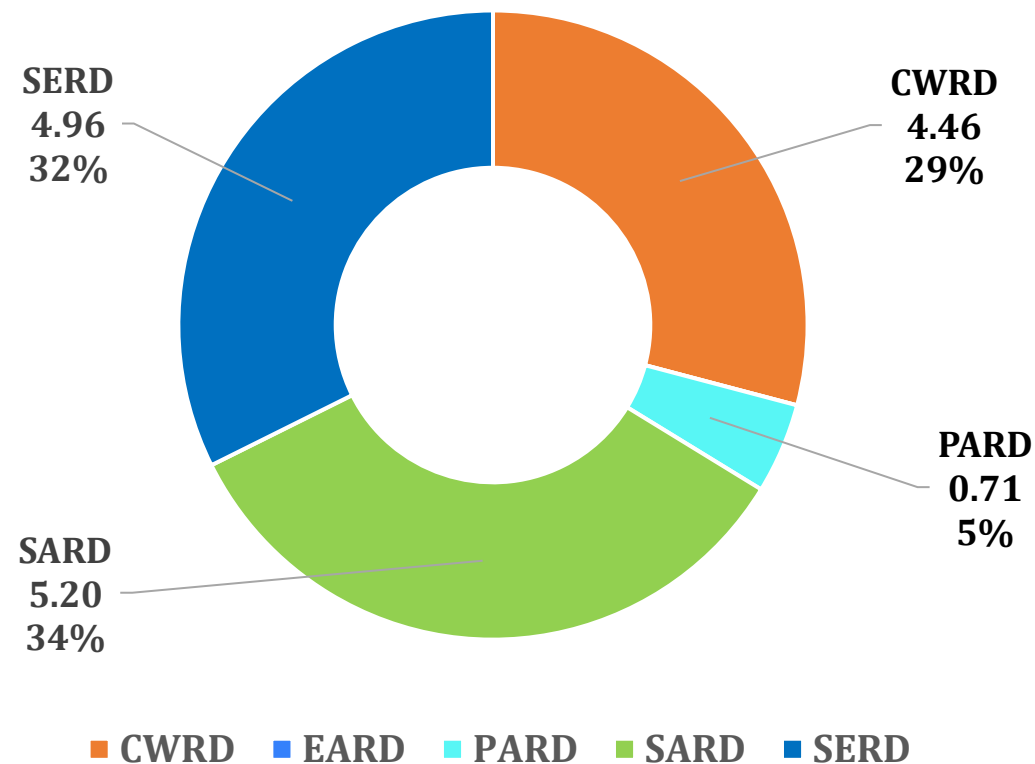


# Pipeline projects by region

2026 Projects by Region (\$ billion)



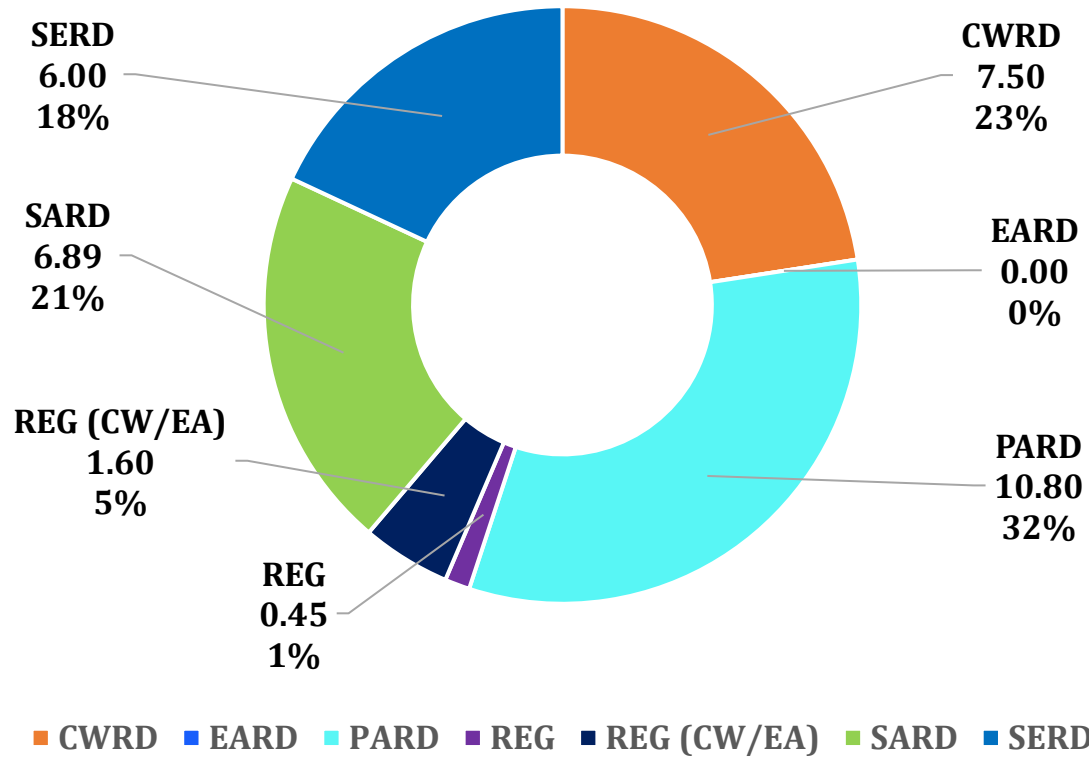
2027 Projects by Region (\$ billion)



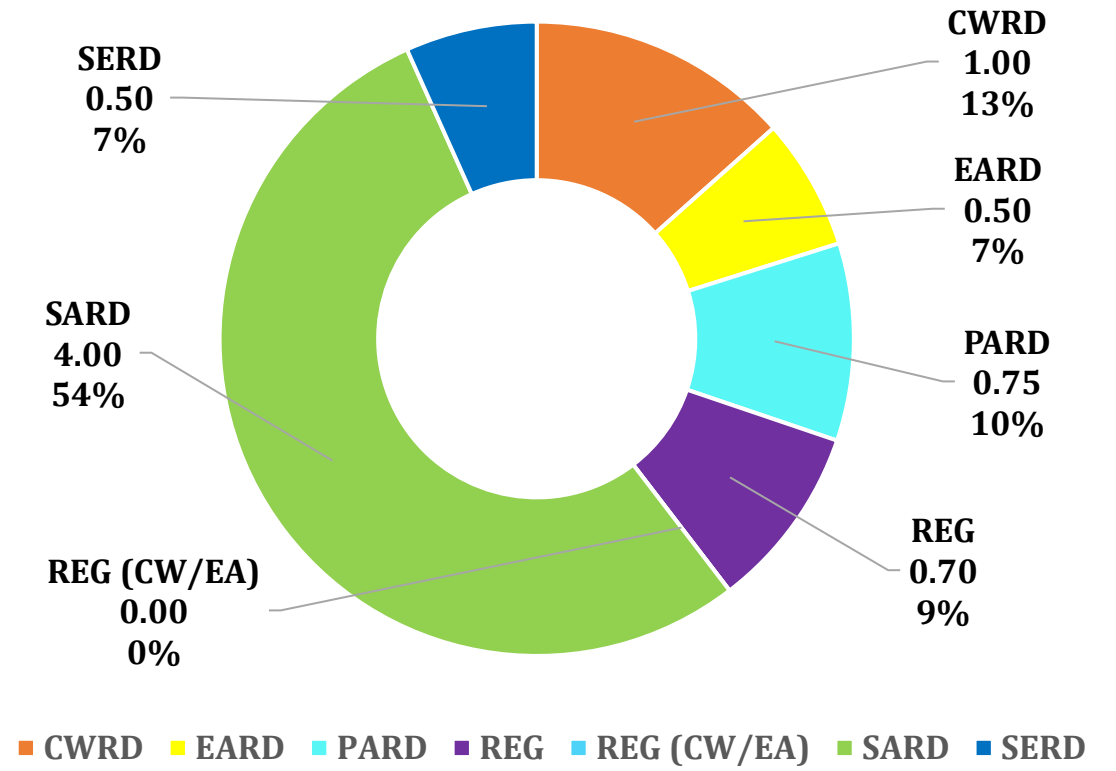


# Technical assistances by region

2026 TAs by Region (\$ million)



2027 TAs by Region (\$ million)



# AZE: Railways Digital Transformation Project (2025)

**Total Amount: \$47 million**

**ADB: \$47 million**

**Approval: September 2024**

**Commitment: January 2025**

## **Project Description:**

Digitalization of key processes at the Azerbaijan Railways (ADY) Closed Joint Stock Company (cargo operation management, assets, investment and construction, cargo commercial system, and corporate functions)

Improvement of ADY's operational and financial performance through streamlined data management, optimized asset management and overall rail operations, reduced cost, enhanced rail safety, and better workforce efficiency.



# PHI: North–South Commuter Railway (NSCR) O&M Concession (2025)

**Client: Department of Transportation**

## **Estimated Project Size:**

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

## **Project Description:**

The project is a 147-km rail line, cofinanced by ADB and JICA, cutting travel time between Metro Manila and Clark to under 1 hour. The Project will provide advice on legal requirements, risk allocation, and structuring the O&M contract. It will also assist in tender process, preparing concession agreements and additional support for capacity building.

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.



# NEP: Sustainable Urban E-mobility Project (2025)

**Total Amount: \$160 million**

- **ADB: \$100 million**
- **Cofinancing: \$40 million (GCF)**
- **Counterpart: \$ 20 million**

**Approval: November 2025**

**Commitment: December 2025**

## **Project Description:**

The project will deploy new electric buses and modernize traffic infrastructure with ITS (Kathmandu Valley).

Improve public transit infrastructure, promote green and livable city concepts, and bolster the city's tourism potential (Pokhara Valley).

This project will foster institutional capacity and green transportation skills, positioning both valleys at the forefront of sustainable urban mobility.



# FIJ: Critical Bridges Resilience Project (2024)

**Total Amount: \$199.5 million**

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

**Approval: November 2024**

**Commitment: December 2024**

## **Project Description:**

Improvement of Fiji's rural and urban transport connectivity

Replacement of key bridges essential to domestic transport network.

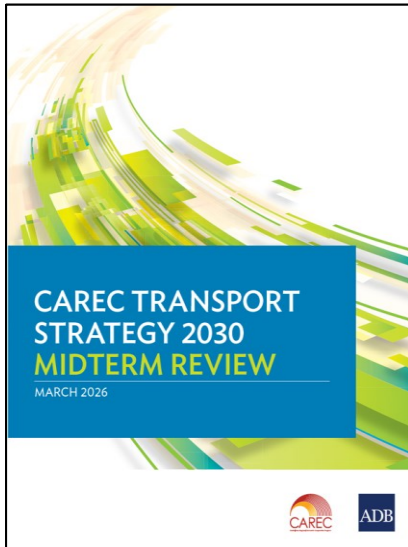
Address the operations and maintenance capacity issues of the Fiji Road Authority on inspecting and maintaining the bridges.





# Central Asia Regional Economic Cooperation (CAREC) Program

- Spanning 11 countries\* from East Asia to Europe
- Conducted Midterm Review of the Transport Strategy in 2025



SIX CENTRAL ASIA REGIONAL ECONOMIC COOPERATION  
 TRANSPORT CORRIDORS



\* CAREC = The Central Asia Regional Economic Cooperation covering Afghanistan, Azerbaijan, People’s Republic of China, Georgia, Kazakhstan, Kyrgyz Republic, Mongolia, Pakistan, Tajikistan, Turkmenistan, and Uzbekistan. ADB placed its regular assistance to Afghanistan on hold effective 15 August 2021.

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# Strategic Gateway for Europe Serving as a Vital Land Bridge

## Growing Demand vs Outdated Infrastructure

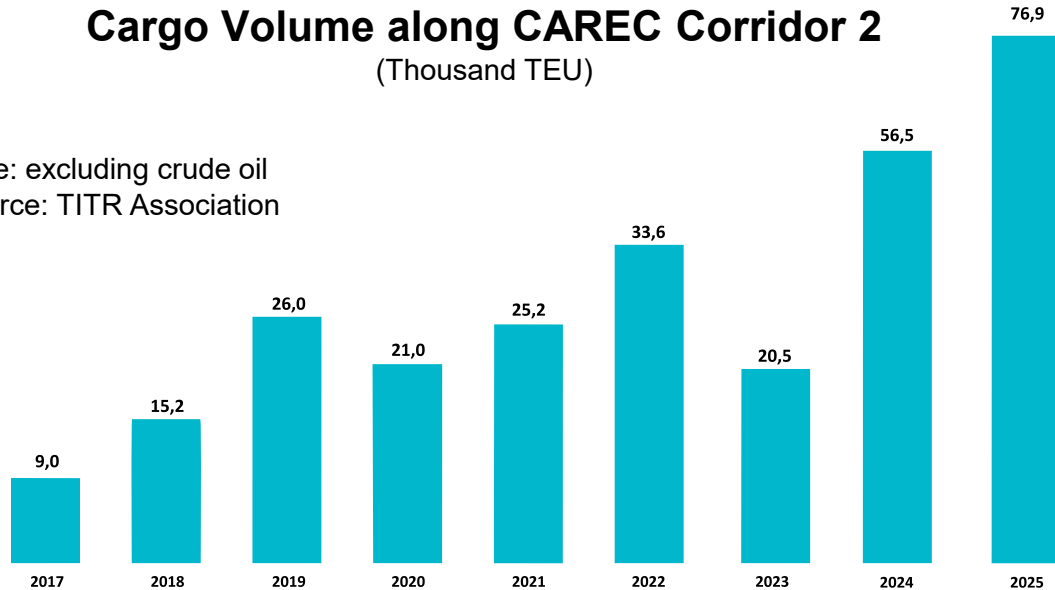
- CAREC trade volumes are expanding, but aging infrastructure and paper-based processes limit capacity.
- Europe's access to Central Asian markets (machinery, chemicals, and consumer goods) and to critical raw materials face unnecessary friction, raising costs for businesses.

## Slow and Costly Border Crossings

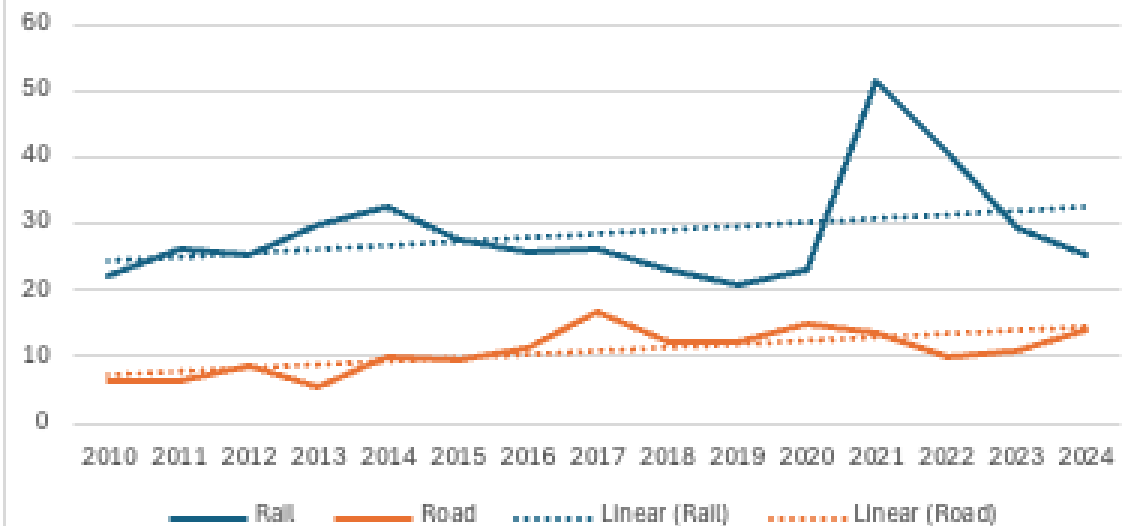
- Average wait times at CAREC borders range from 12 hours (road) to 26 hours (rail). Over 30% of transit time is spent at borders, disrupting just-in-time supply chains
- Cumbersome and slow border crossing procedures.
- Inefficient and duplicative customs, immigration, security, sanitary, and phytosanitary inspections.

**Cargo Volume along CAREC Corridor 2**  
 (Thousand TEU)

Note: excluding crude oil  
 Source: TITR Association



**Time taken to clear BCP (hour)**





## BUILD (Borders Upgrades for Integration, Logistics, and Development) Facility

- Financing facility for border crossing point (BCP) improvements in CAREC region to address infrastructure and soft-side needs and to promote joint BCPs
- Adopt a strategic and programmatic approach.
- ADB financing of \$400 million to finance a series of individual small-value BCP projects (up to \$50 million) along the CAREC network.
- Projects to be implemented over 10 years.
- Build upon ADB's extensive experience on BCP projects in the region (6 completed, 8 ongoing) showing significant cost and time reduction at BCPs.
- Yallama BCP (UZB) reduced the average customs processing time from 11.4 to 4.4 hours.
- Altanbulag and Bichigt BCPs (MON) contributed to drop of average road border-crossing cost by 40%.





# BUILD Partnership

- ADB's long-term commitment of \$400 million for BCP improvements will:
  - **unlock opportunities** for European firms to participate in infrastructure and digitalization projects creating new markets for European goods and services.
  - complement Europe's **Global Gateway** strategy and advances Europe's commitment to global development and poverty reduction.
  - provide visibility for both ADB, its developing member countries (DMCs), and development partners, to program and design such projects in a structured manner.
  - provide more opportunities for private sector.
- ADB is **seeking approx. \$150 million grant and concessional co-financing:**
  - Grant resources to offset the financing charges and interest rate of ADB loans for all CAREC countries.
  - Concessional resources comparable to ADB COL or lower for Group C countries.
  - Co-financing can be linked in various forms (for an individual project, thematic, or on trust-fund basis) anytime during the facility.
  - Early engagement is recommended.
  - Disbursement of co-financing funds can be frontloaded
  - opportunities for private sector.



# BUILD: Timeline

- 2025: Initial CAREC country consultations conducted.
- 16–19 June 2025: CAREC Transport Sector Committee Meeting and CAREC Senior Officials Meeting endorsed the BUILD approach.
- 20 November 2025: CAREC Ministerial Conference endorsement.
- 22 December 2025: ADB approved the BUILD Concept Note.
- **March 2026: Technical Assistance (\$1.25 million ADB financing) approval.**
- **June 2026: ADB approval of the BUILD facility**
- **2026-onwards: Individual projects designed (ongoing) and approved.**





# Knowledge highlights (2025–2026)

- Asia and the Pacific Transport Forum 2026 (flagship event)
- Advancing Transport Leadership Program (JPN, PRC, ROK)
- ADB Annual Meeting 2026 Seminar: Pan-Asia Connectivity and Corridors
- Asia Pacific Road Safety Observatory 2025 Annual Meeting and Study Tour
- High-Level Regional Environmentally Sustainable Transport Forum (2025)
- Webinar Series on (i) E-Mobility and (ii) Green Roads (2025)





# Objectives and Theme

## APTF core objectives

**Showcase** ADB's transport operations, technical assistance & financing approaches

**Strengthen** understanding of priority & emerging transport opportunities in Asia and the Pacific

**Share** practical lessons, good practices, and innovations from country and project experience

**Build** technical and institutional capacity of DMC officials and practitioners

**Collaborate** among governments, development partners, academia, civil society & private sector

**Promote** alignment between transport policies, investments & broader sustainable development objectives

## Forum theme

### "From Priorities to Actions"

Discussions during the Forum will focus on practical delivery challenges and solutions, including how transport systems can expand access, improve safety, manage risks affecting transport system reliability and continuity, and enhance efficiency through project design, financing arrangements, and institutional systems.



WEEK AT A GLANCE

	18 MAY   MONDAY	19 MAY   TUESDAY	20 MAY   WEDNESDAY	21 MAY   THURSDAY	22 MAY   FRIDAY										
8:00 AM															
9:00 AM		ADB Gender Team Event: Women in Transport Network: Supporting Women as Leaders and Employees* in Southeast Asia, East Asia and the Pacific  (by invitation only)	ADB Showcase/ Networking/ Kick-off	Parallel Session Roads	Parallel Session Transport and RCI	Training Maritime	Training Green Roads Toolkit	Focus Session Applied Research for Sustainable Transport	Focus Session Project Management in Cities	CAREC Smart Mobility Working Group Meeting  (by invitation only)	Training Evidence and Technology to Drive Impact	Training UN Decade	Focus Session Mobility Assessment Tool for Traffic Air Pollution	Showcase Session From Ideas to Impact	Field Visit (TBC)  (by invitation only)
10:00 AM	Transport Day  (Internal event for ADB staff)	Morning Break													
11:00 AM		Opening Plenary ADB Transport: Decade, Finance, Program, and Project Assistance	Parallel Session Maritime/ Logistics	Parallel Session Urban Transport	Focus Session Donor Roundtable	Showcase Session From Ideas to Impact	Focus Session Construction in Mountainous Areas	Focus Session Urban Planning and Cell Phone Data		Training Poverty and Social Analysis	Training Data Session	Training Electric Vehicles	Training New Modes of Transport		
12:00 PM		Lunch													
1:00 PM															
2:00 PM		Plenary 1 Decade of Sustainable Transport	Parallel Session Railways	Parallel Session Road Safety	Training Railways	Focus Session Advancing Transport Leadership Program (by invitation only)	Training NMT/ Paratransit	Training Regional Cooperation and Integration							
3:00 PM															
4:00 PM		Plenary 2 ADB Assistance: Past, Present, and Future	Closing Plenary Future of Transport												
5:00 PM															
6:00 PM		Welcome Reception													
7:00 PM															

LEGEND: Plenary Sessions Parallel Sessions Training/Focus Sessions Invitation-Only Events



ADB Business Opportunities Seminar  
EUROPEAN ROADSHOW  
ZURICH · PARIS · LISBON · MADRID · BRUSSELS

ADB BUSINESS  
**OPPORTUNITIES**  
SEMINAR SERIES 2026  
PEOPLE. PARTNERSHIPS. POSSIBILITIES.



# Thank you!

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Masahiro Nishimura