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ADB's Energy Sector Pipeline – a Snapshot

UK-ADB Business Connect, 8 September 2026

Peter Baum
Senior Energy Specialist, Energy Sector Office

ADB

Powering Asia's Economic Growth Requires Unprecedented Investment

$1 trillion a year

ADB's estimated annual power infrastructure need in developing Asia, 2016–2030.
Equivalent to $14.7 trillion over the period.

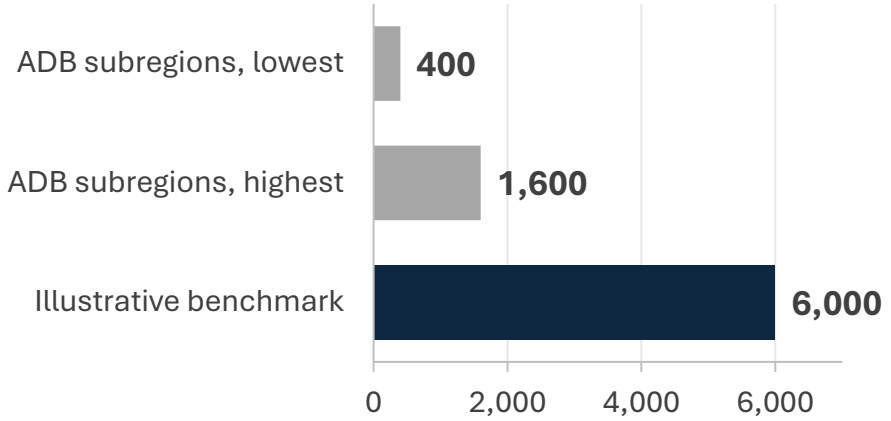
+790 TWh

of additional electricity consumption across Asia and the Pacific in a single year.

$1.8 trillion

illustrative investment for 900+ GW of renewable generation across eight Southeast Asian countries at a 6 MWh/person benchmark. Generation only; grids additional.

Electricity use per person, kWh



85% of global power-demand growth in 2026 is expected to come from Asia and the Pacific

Use per person is up 192% since 2000, and demand is rising 50% faster than last decade.
The $1 trillion a year is the base need, not the cost of catching up.

Power need: ADB, Meeting Asia's Infrastructure Needs (developing Asia, 2016–2030). Demand growth and shares: IEA Electricity 2026; UNDP, June 2026. $1.8t benchmark: illustrative Stanford analysis (Wirjawan, 2024), not an ADB estimate or target. Per-person use: ADB, June 2026.

Rapid demand growth is putting pressure on the whole power system, especially the grids need to connect, become more resilient, smarter and efficient to manage growing supply and demand.

ADB

Public budgets cannot carry this investment alone

ADB financing, policy support and risk mitigation create opportunities across both sovereign and commercially financed projects.

SOVEREIGN AND MDB-FINANCED INVESTMENT

Where ADB helps build the market

- Transmission and distribution networks
- Substations, grid software and digital systems
- Sector reform and market infrastructure

Large network investments typically remain sovereign or MDB-financed because of long payback periods, natural-monopoly characteristics and rights-of-way requirements. This is where major consulting, equipment and works packages are often procured.

PRIVATE AND COMMERCIAL INVESTMENT

Where commercial investment can scale

- Generation
- Battery and grid-scale storage
- Energy efficiency and demand-side solutions

Where market rules and offtake are credible, commercial financing can scale. In Thailand, ADB financed the first five solar projects; subsequent projects attracted commercial bank financing.

Sector reform, credible offtake and risk mitigation help move projects from public support toward commercial scale.

Sources: ADB, World Bank and IEA on public and private financing roles in the energy sector; Thailand solar example: ADB.

ADB finances what private capital cannot yet price and makes the rest investable.

What ADB finances across the energy system

GENERATION

How power is made

- Clean and low-carbon generation
- Production efficiency
- Alternative fuels: hydrogen, biofuels
- Generation dispatch reform
- Nuclear power, *where countries choose it*

TRANSMISSION AND DISTRIBUTION

How power moves

- Transmission and distribution networks
- Substations and grid-scale storage
- Smart and digital power systems
- Cybersecurity and digital resilience
- Flexible infrastructure for cleaner fuels
- Cross-border interconnectors

42%* of ADB energy financing

UTILIZATION

How power is used

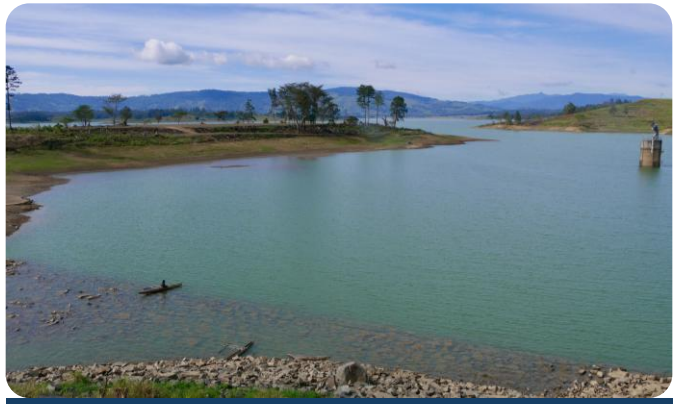
- Energy access and electrification
- Efficiency, metering, building-to-grid
- Cleaner energy for industry and transport
- Heat pumps and solar heating
- Cross-sector decarbonization

THE FORWARD EDGE

- Offshore wind
- Digitalization and smart power systems
- Regional interconnection and power trade
- Nuclear readiness
- Hard-to-abate sectors, green H2 and fuels
- Critical minerals and clean tech manufacturing

* Share of ADB Energy Sector committed financing for electricity transmission and distribution, 2016–2025. SPD Operations Data; sovereign and nonsovereign committed financing.

Consulting opportunities come in many different forms...



Floating Solar PV Development

Country Papua New Guinea
Type Feasibility study
Volume $800,000

Site selection and full feasibility assessment for floating PV on hydropower reservoirs. Preparation of competitive tender process for private project development



Smart Distribution Grid Development

Country Pakistan
Type Design and construction supervision
Volume $3,000,000

Project management and design support for $200 m loan for digitalization of 5 distribution companies (e.g. SCADA, advanced metering, management software)



Vehicle-Grid Integration: Pilot and Strategy Development

Country Thailand
Type Technology and capacity development
Volume $600,000

Support for VGI pilot implementation, international knowledge exchange and system analytics and development of broader VGI strategy

Examples of recent technical assistance work

… spanning different areas of project and client support

Consulting services can illustratively be categorized in three areas

1



Project preparation

Pre-feasibility, feasibility and due diligence

Due diligence activities (incl. technical, financial, social, environmental etc.) as well as analysis to support site selection and design choices

2



Project implementation

Construction supervision, PMU support, detailed design

This can entail support across the delivery phase of ADB-financed projects

3



Technology, knowledge & capacity

Development of markets and enabling environment

Support to pilot technologies, develop knowledge and capacities in DMCs, and support enabling environment

Energy sector financing pipeline till 2029 over $18 billion and 200 projects

$18.5 billion
indicative financing

202
projects and TAs

37
developing member countries



Indicative financing by region

South Asia	$6.8b
Southeast Asia	$3.5b
Central & West Asia	$7.3b
Pacific	$0.6b
East Asia	$0.3b



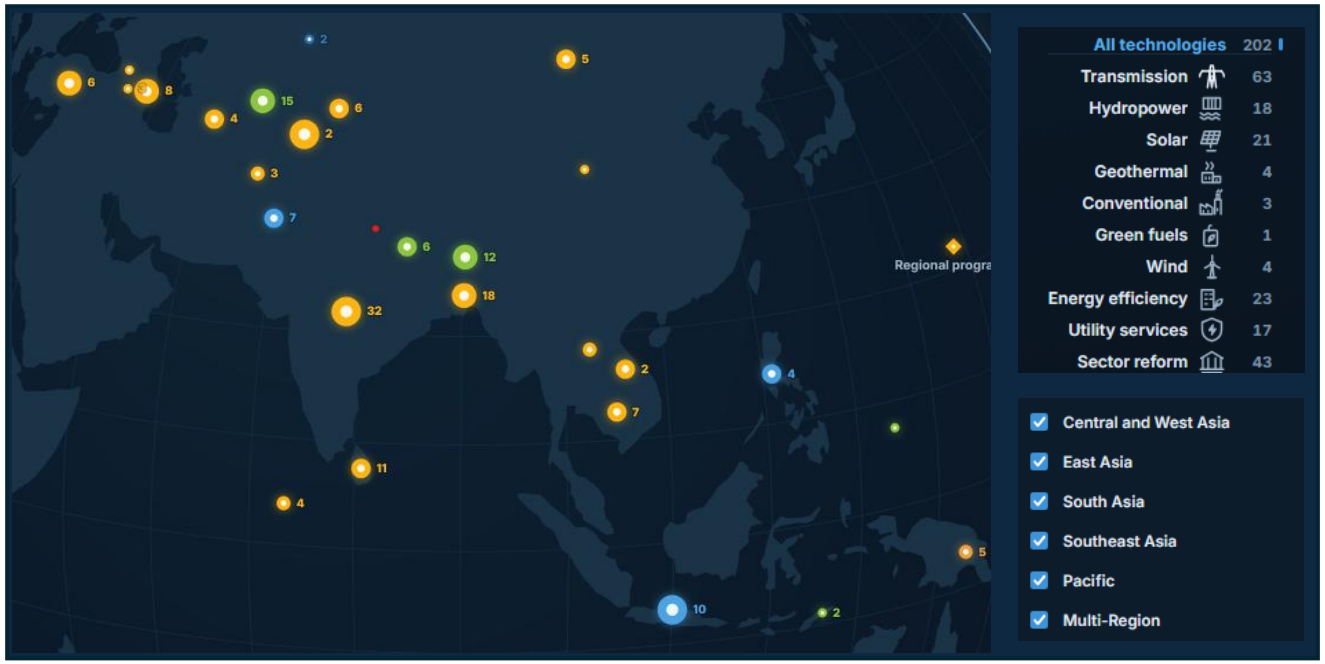
Preview the live pipeline

Explore by country, sector, modality and year

Indicative pipeline only. Projects are not confirmed and are subject to change, particularly beyond 2027. Policy-based loans are excluded. Figures compiled from the consolidated project and TA pipeline, 31 August 2026.

How to find opportunities to work with ADB Energy

Access pipeline projects & opportunities via QR code



Engage with us at ...

ADB Business Opportunity Fare

21-24 Sept 2026, @ ADB HQ, Manila

4-day event on opportunities and procurement processes

Asia Clean Energy Forum

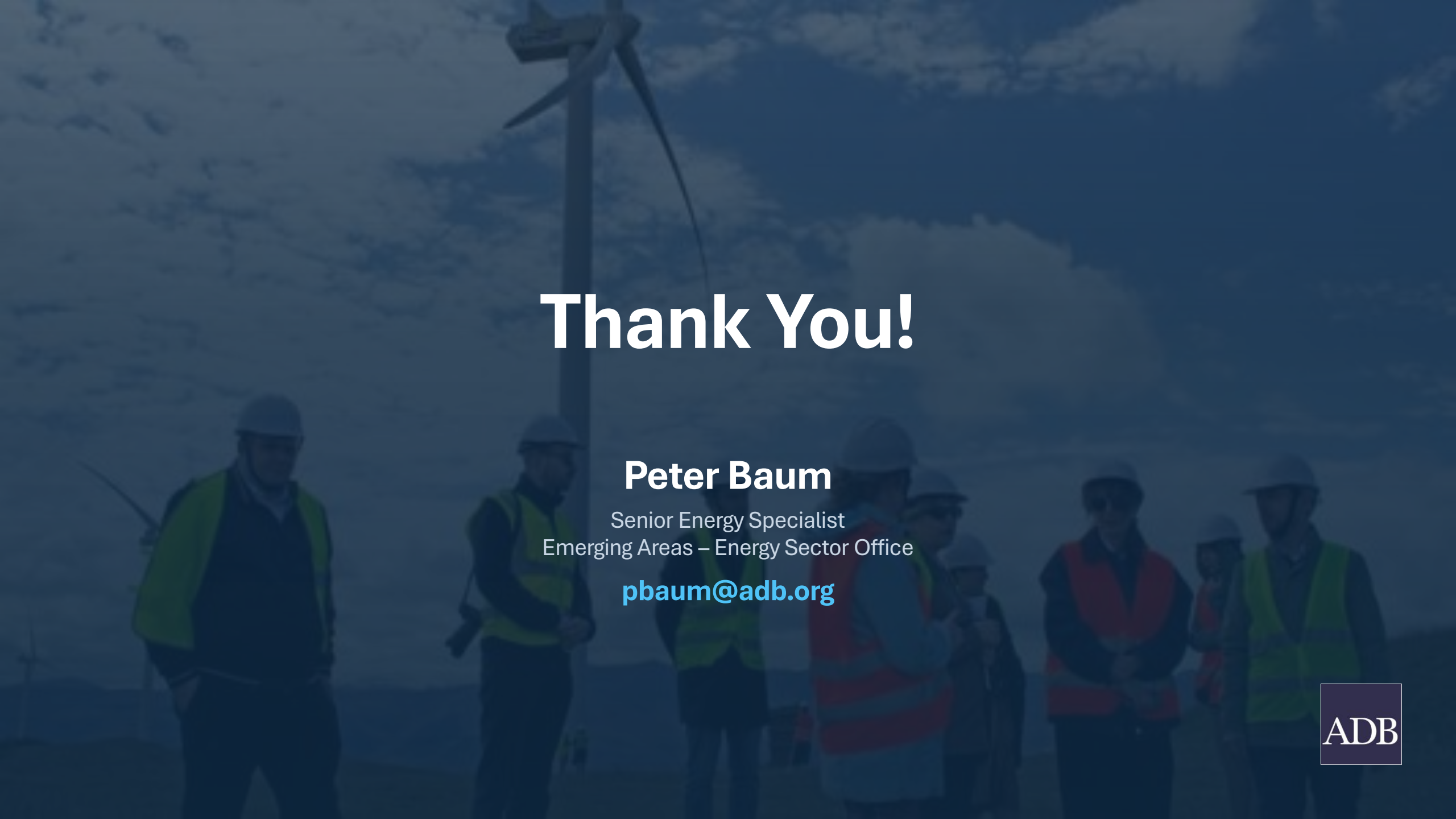
Every June, @ ADB HQ, Manila

ADB's flagship energy sector event with participants from across the region and globally

Webinars, knowledge events and regional conferences

Frequent knowledge sharing events (both virtual and in-person) on technology, regional initiatives etc.





Thank You!

Peter Baum

Senior Energy Specialist
Emerging Areas – Energy Sector Office

pbaum@adb.org