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ASIAN DEVELOPMENT BANK BUSINESS OPPORTUNITIES FAIR 2026

21-24 SEPTEMBER 2026 | ADB HEADQUARTERS, MANILA

VALUE FOR MONEY: DRIVING QUALITY INFRASTRUCTURE

Transport opportunities in Central & West Asia, East Asia, and the Pacific

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Overview

The transport sector remains one of the largest areas of investment for the Asian Development Bank (ADB).

Across Central and West Asia (CW), East Asia (EA), and the Pacific (PA), the developing member countries (DMCs) are seeking to enhance regional connectivity, improve transport efficiency, strengthen climate resilience, reduce transport sector emissions, and leverage digital technologies.

These priorities create substantial opportunities for consulting firms offering technical, managerial, safeguards compliance, digital, and financial advisory services.

However, the consulting services market is becoming increasingly competitive, with higher expectations regarding innovation, climate expertise, local knowledge, digital capabilities, and value for money.



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Overview (Cont'd)

ADB continues to support the DMCs in the preparation of:

- National transport master plans
- Corridor development strategies
- Multimodal transport plans
- Logistics and trade facilitation studies
- Urban mobility plans
- Regional connectivity initiatives

Consulting opportunities include:

- Feasibility studies
- Economic and financial analyses
- Traffic forecasting
- Preliminary and detailed engineering design
- Safeguards due diligence studies
- Institutional assessments



Overview (cont'd)

- Railways and mass transit
 - i. Multimodal integration of transport modes
 - ii. Support of operation and maintenance (O&M) for complex transport systems, including through guarantees for O&M contracts/concessions and PPPs
- Smart 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 signalling for improved operations efficiency
- Regional Cooperation and Integration (RCI) including border-crossing and logistics infrastructure, digitalization, and border management reforms

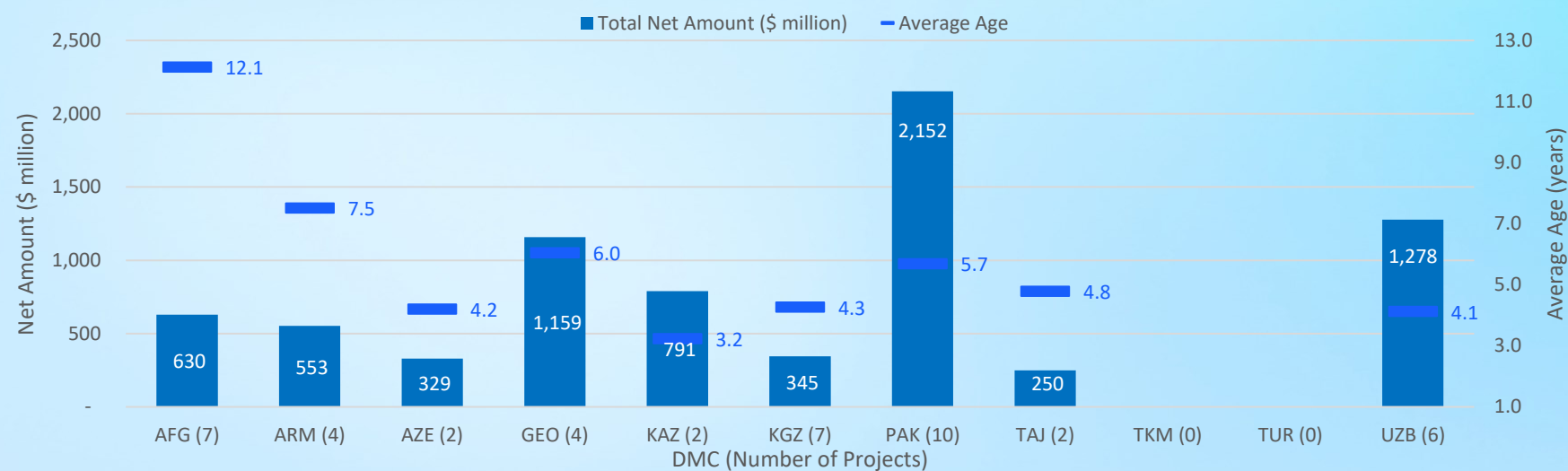


Opportunities in the Private Sector

- Smart mobility
- Greening/electrification of port and airport facilities
- Sustainable aviation fuel and other decarbonization measures for aviation
- RCI opportunities in cross-border transport, logistics, and trade facilitation, including international freight operations, logistics service providers, warehousing, and digital border solutions
- Asset management including operations and maintenance

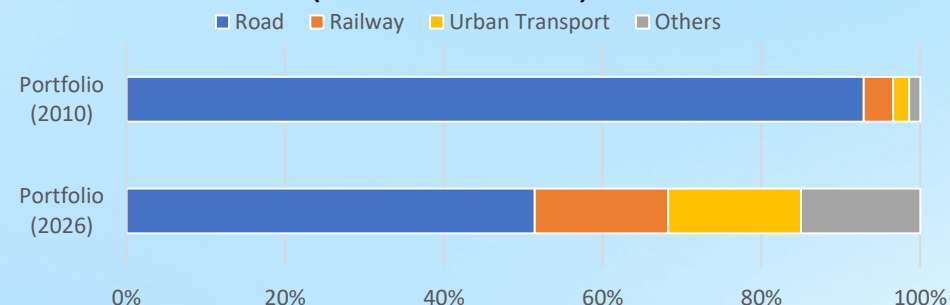


Portfolio: Loans and Grants Portfolio in Central and West Asia - *By number, age, and sub-sector ratio*



Number of Projects	44
Total Portfolio Size	\$7,487 M
Uncontracted Balance	\$1,964 M
Undisbursed Contract Balance	\$1,733 M
Undisbursed Loan Balance	\$3,697 M

Subsector Ratio (Amount-Based)

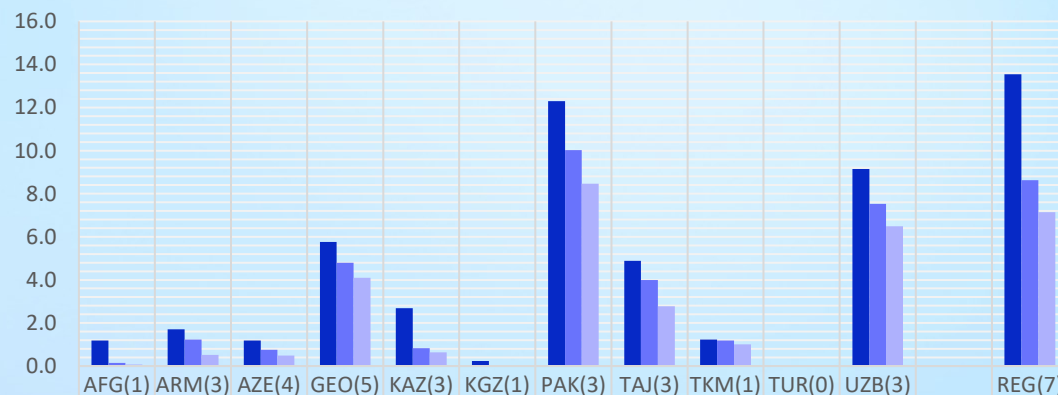




Portfolio: Technical Assistance (TA) and Project Readiness Facility (PRF) / Small Expenditure Financing Facility (SEFF) Portfolio in Central and West Asia

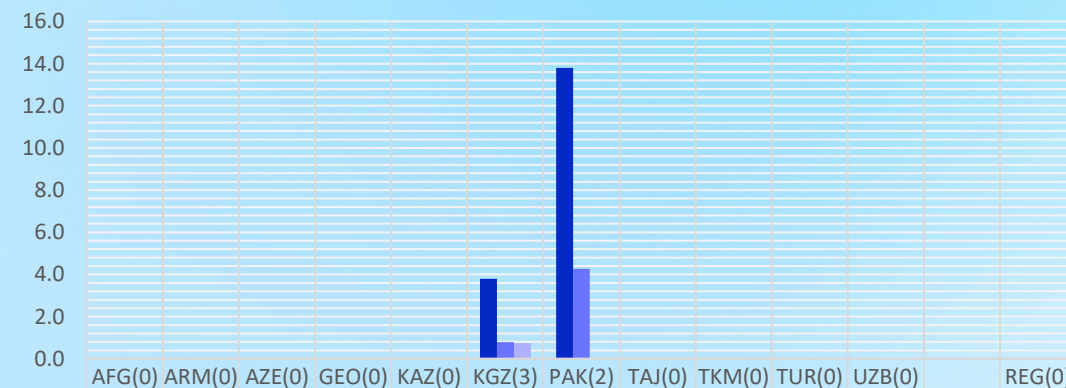
- By products and countries

TA Portfolio (\$million)



■ Net Amount	1.2	1.7	1.2	5.8	2.7	0.2	12.3	4.9	1.2	-	9.2	-	13.6
■ Commitment Amount	0.2	1.2	0.8	4.8	0.8	-	10.0	4.0	1.2	-	7.5	-	8.6
■ Disbursed Amount	0.1	0.5	0.5	4.1	0.6	-	8.5	2.8	1.0	-	6.5	-	7.1

PRF/SEFF Portfolio (\$million)



	AFG(0)	ARM(0)	AZE(0)	GEO(0)	KAZ(0)	KGZ(3)	PAK(2)	TAJ(0)	TKM(0)	TUR(0)	UZB(0)	REG(0)
Net Amount	0.0	0.0	0.0	0.0	0.0	3.8	13.8	0.0	0.0	0.0	0.0	0.0
Commitment Amount	0.0	0.0	0.0	0.0	0.0	0.8	4.3	0.0	0.0	0.0	0.0	0.0
Disbursed Amount	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.0	0.0



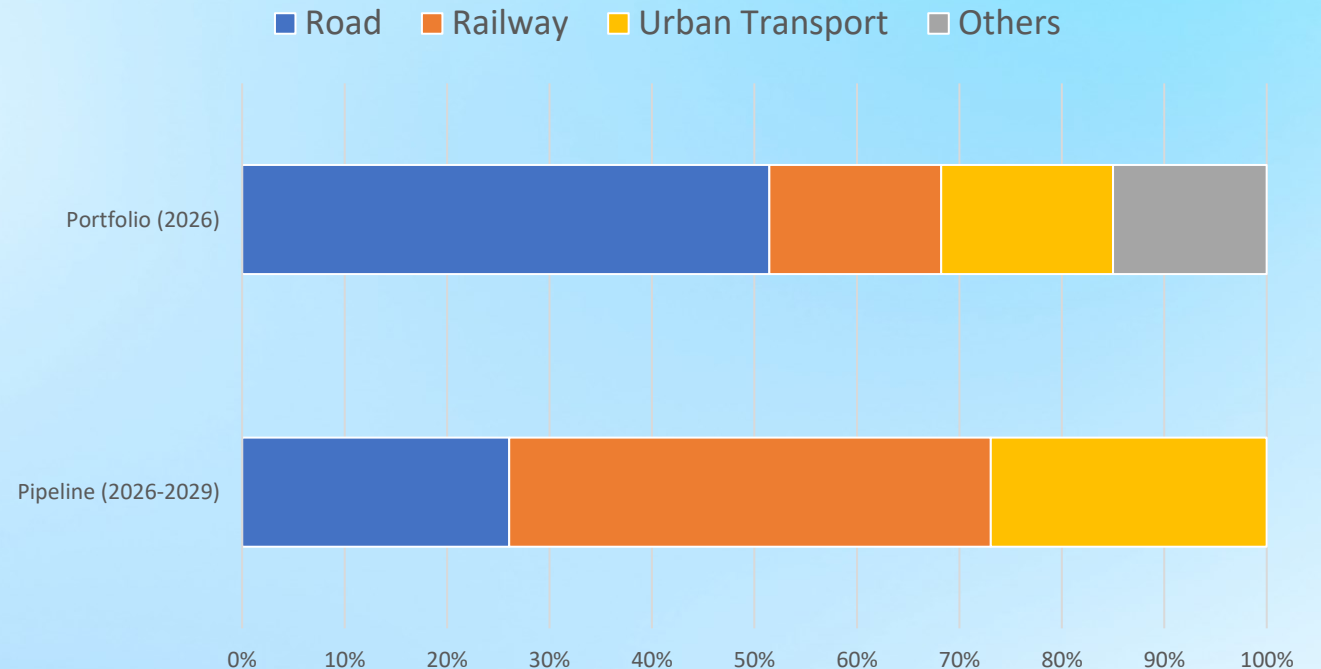
Loans and Grants Pipeline in Central and West Asia, 2026-2029 (\$ million)

- *By funds source and sub-sector*

Fund Source



Subsector Ratio (Amount-Based)





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2026 Approvals/Commitment in CW

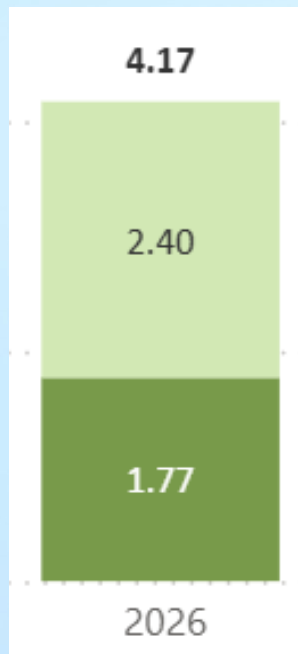
DMC	Project Name	Amount (\$ million)
KAZ	Central Asia Regional Economic Corridors 3 and 6 Turkistan Oblast Highway (Saryagash Bypass) Project	377.00
TAJ	Transport Sector Project Preparation Facility	20.00
REG	Border Upgrades for Integration, Logistics, and Development (BUILD) Facility	400.00



2026 TA and PRF/SEFF Pipeline in CW (\$ million)

TOTAL

Programmed Committed

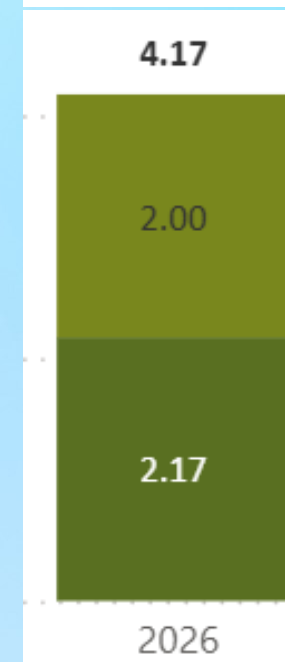


DMC

ARM	0.80
AZE	0.67
GEO	0.40
KGZ	0.50
PAK	0.75
TAJ	0.35
TKM	0.30
TUR	
UZB	0.40
Total	4.17

FUND SOURCE

TASF TASF-OTHERS



PRF/SEFF

- GEO: 1 SEFF activity (OCR: \$2.5 million)
- PAK: 1 SEFF activity (COL: \$6.1 million)
- TAJ: 2 SEFF activity (COL: \$20 million, ADF: \$5 million)



2026 TA Pipeline CW (\$ million)

DMC	Project Name	Amount (\$ million)
ARM	Accelerating Transport Sector Development	0.80
GEO	GEO: Enhancing Capacity and Asset Sustainability for Transport Infrastructure	0.30
GEO	TA 10443-GEO: Strengthening Project Development of the Transport Sector (Subproject 2) (additional financing)	0.10
KGZ	Preparing Resilient, Green, and Regionally Integrated Transport Projects	0.50
TAJ	TA 9979-TAJ: Preparing Transport Projects (formerly Preparing the Road Network Sustainability Project – additional financing)	0.35
UZB	TA 6804: Preparing Road Modernization Projects (additional financing to prepare CAREC Corridors 2 and 6 Road Modernization and Safety Project)	1.40
REG	Enhancing Cross Regional Collaboration in Project Preparation and Implementation	0.45
REG	Pan-Asian Transport Network Performance and Resilience Analytics for Investment Prioritization	1.20
REG	Multimodal Transport Hub Diagnostics and Facility Development to enhance CAREC Network Efficiency and Resilience	0.60



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2026 TA Pipeline, Pacific (\$ million)

DMC	Project Name	Amount (\$ million)
PNG	Transport Sector Improvement (Phase 2)	5.00
REG	Pacific Transport Sector Development (FIJ, FSM, SAM, SOL, TUV, VAN)	2.10



2027-2029 Loans and Grants Pipeline, CW

DMC	Project Name	Indicative Approval Year	Amount (Indicative \$ million)
ARM	Resilient and Inclusive Road Sector Improvement Project II	2027	165.00
KAZ	Enhancing Central Asia Regional Economic Cooperation Regional Connectivity Program	2027	1200.00
KAZ	Enhancing Central Asia Regional Economic Cooperation Regional Connectivity Program (Tranche 2)	2027	405.00
UZB	CAREC Corridors 2 and 6 Road Modernization Safety Project	2027	360.00
TAJ	CAREC Green Corridor Connectivity Project	2027	60.00
AFG	Community- Connectivity Project	2029	50.00
KGZ	CAREC Corridor 3 Reconstruction Project	2029	40.00
UZB	Navoi-Karman Bypass Road Project (147-181.5 km section of M37 Road)	2029	150.00

Note: Approval year and amount are subject to changes



2027-2029 Loans and Grants Pipeline, EA

DMC	Project Name	Indicative Approval Year	Amount (Indicative \$ million)
MON	Small Expenditure Finance Facility (Activity Subloan III)	2027	9.00
MON	Ulaanbaatar Transport Improvement Project 2	2027	100.00
MON	CAREC Road Transport and Logistics Development	2028	150.00

Note: Approval year and amount are subject to changes



2027-2029 Loans and Grants Pipeline, PA

DMC	Project Name	Indicative Approval Year	Amount (Indicative \$ million)
SAM	Resilient Road Network Project	2027	12.00
SOL	Land and Maritime Connectivity Project (Tranche 3)	2027	52.00
FSM	Sustainable Roads Infrastructure Investment Project (Phase 2)	2028	38.00
PNG	Mountainous Road Improvement and Resilience Project	2028	206.00
SOL	Second Land and Maritime Connectivity Project	2028	30.00
FIJ	Critical Bridges Resilience Project Phase 2	2029	100.00

Note: Approval year and amount are subject to changes



Transport sector market attractiveness

Region	ADB Operations Market	Growth Potential	Competition Level	Focus
Central & West Asia	Large	Very High	High	Focus on highways, railways, RAMS, climate resilience, and project design and construction supervision.
East Asia	Small	High	Very High	Differentiate through digital transformation, smart mobility, decarbonization, and advanced analytics.
Pacific	Medium	High	Moderate	Promote innovation under the differentiated approach for Small Islands Development States (SIDS) and Fragile and Conflict-Affected Situations (FCAS) Focus on climate resilience, safeguards, sustainable O&M, and institutional strengthening.



Opportunities: Procurement and Consulting Services - Opportunity Matrix

Consulting Area	Central & West Asia (CW)	East Asia (EA)	Pacific (PA)
Road and Highway Development	Very High. CAREC corridor upgrades, regional connectivity, climate-resilient highways, road rehabilitation and reconstruction.	Moderate. Focus on network optimization, safety improvements, and smart road technologies.	High. Rural accessibility roads and climate-resilient transport links.
Railway Development	High. Railway modernization, regional connectivity, logistics corridors, intermodal facilities.	Very High. High-speed rail support, urban rail systems, intelligent railway operations.	Low. Limited rail investments.
Ports and Maritime Transport	Moderate. Dry ports, inland logistics hubs, Caspian Sea connectivity.	High. Smart ports, logistics integration, green port initiatives.	Very High. Port modernization, inter-island shipping, maritime resilience.
Airport Development	Moderate. Regional airport modernization and cargo facilities.	Moderate. Technology upgrades and airport management systems.	High. Climate resilient airport upgrading, and safe and reliable aviation network development.
Urban Mobility	High. BRT systems, traffic management, public transport reforms.	Very High. Low-carbon urban transport, transit-oriented development, intelligent mobility.	Moderate. Growing demand in capitals in SIDS.
Climate Resilience	Very High. Landslide, flooding, avalanche, and extreme weather adaptation.	High. Climate-proofing existing assets and reducing emissions.	Very High. Sea-level rise, cyclone resilience, coastal protection measures.
Road Asset Management Systems (RAMS)	Very High. Strong demand for institutionalizing asset management and maintenance planning.	High. Advanced asset management technologies and predictive maintenance.	High. Cost effective asset management for infrastructure sustainability.



Opportunities: Procurement and Consulting Services

- Opportunity Matrix (cont'd)

Consulting Area	Central & West Asia (CW)	East Asia (EA)	Pacific (PA)
Digital Transformation and ITS	High. Weigh-in-motion systems, ITS, digital road monitoring.	Very High. AI, digital twins, connected mobility, smart transport systems.	Moderate. Emerging applications with donor support.
Construction Supervision	Very High. Large highway and railway construction programs.	High. Specialized supervision and systems integration.	High. Quality of project implementation and institutional capacity development in project implementation.
Environmental and Social Safeguards	High. Land acquisition, resettlement, biodiversity management.	High. Urban environmental management and social inclusion programs.	Very High. Environmental sensitivities and community engagement requirements.
Gender and Social Inclusion	High. Increasing integration into transport projects.	High. Inclusive mobility and accessibility initiatives.	High. Strong donor emphasis on community-based development.
Regional Cooperation and Integration	High. CAREC Program and BUILD initiatives	High. CAREC Program and BUILD initiatives	Low.
Transport Sector Reform	Very High. Road agency modernization, maintenance funding reforms, PPP frameworks.	Moderate. Focused on efficiency improvements and digital governance.	High. Institutional capacity building for investment planning and sustainable O&M.
Electric Mobility and Decarbonization	Emerging. Initial EV strategies and green freight concepts.	Very High. Large-scale EV deployment and transport decarbonization programs.	Moderate. Increasing needs of public urban transport systems including renewable-energy-based solutions.
PPP and Private Sector Participation	High. Toll roads, logistics facilities, rail terminals.	High. Urban transport concessions and smart infrastructure.	Emerging. Private sector development in SIDS and FCAS for investment and O&M.



Opportunities: Procurement and Consulting Services

- *by theme*

Climate-Resilient Infrastructure (Highest Growth Segment)

- ADB has significantly increased its focus on climate adaptation, resilience, and low-carbon transport under Strategy 2030 and its climate finance commitments.
- Transport projects increasingly require climate risk screening, resilient engineering design, asset vulnerability assessments, and adaptation planning.
- Typical consulting assignments include Climate Risk and Vulnerability Assessments (CRVA), hydrology and flood modeling, slope stabilization and geohazard studies, coastal engineering and sea-level rise assessments, and climate-resilient design reviews.

Green and Low-Carbon Transport

- ADB is actively developing a pipeline of sustainable urban mobility and low-emission transport projects across Asia and the Pacific.
- Regional technical assistance for green transportation supports project preparation, due diligence, and development of investment pipelines for electric mobility and low-carbon urban transport.
- Typical consulting assignments include EV charging infrastructure planning, urban mobility master plans, transport decarbonization road maps, carbon accounting and GHG assessments, and public transport modernization.



Opportunities: Procurement and Consulting Services - *by theme (cont'd)*

Corridor and Trade Facilitation Development

- The **CAREC program** continues to be one of ADB's largest regional transport initiatives.
- Recent investments in the Tbilisi Bypass and CAREC Corridor-2 (Middle Corridor) demonstrate the growing emphasis on multimodal logistics, border-crossing efficiency, and regional integration.
- **Border Upgrades for Integration, Logistics and Development (BUILD) Facility** for border crossing point (BCP) improvements in CAREC region to address infrastructure, digitalization, and border management reforms, promote joint BCPs and harmonized cross-border procedures, and build capacity within CAREC countries.
- Typical consulting assignments include corridor development strategies, logistics master plans, customs and border process reviews, economic corridor assessments, and transport demand forecasting.

Digital Transformation of Transport

- ADB increasingly supports adoption of smart mobility, digital transport systems, intelligent infrastructure management, and data-driven asset management.
- Green transport and smart port investments in East Asia are key examples of this trend.
- Typical consulting assignments include Road Asset Management Systems (RAMS), Intelligent Transport Systems (ITS), smart port operations, GIS and digital mapping, AI-enabled infrastructure monitoring, and digital twin applications



Opportunities: Procurement and Consulting Services - *Illustrative examples of emerging opportunities*

Region	Key Opportunity Areas	Illustrative ADB Projects and Programs	Consulting Opportunities
Central & West Asia	Regional corridors, highways, railways, logistics, border facilities, road asset management, climate resilience	CAREC Program , including the development of the Corridor-2 (Middle Corridor) and the CAREC Transport Strategy 2023 Mid-term Review; the Border Upgrades for Integration, Logistics and Development (BUILD) Facility . Georgia Tbilisi Bypass Road Project supporting the East-West Highway and CAREC Corridor 2; ongoing investments in Georgia, Kazakhstan, Tajikistan, Pakistan, Uzbekistan, and Kyrgyz Republic transport corridors.	Feasibility studies, detailed engineering design, construction supervision, road safety audits, tunnel engineering, climate resilience assessments, RAMS implementation, logistics and trade facilitation studies, PPP advisory.
East Asia	Green transport, urban mobility, digitalization, intelligent transport systems (ITS), low-carbon logistics	Promoting Green Transportation in Asia and the Pacific TA , supporting bankable urban mobility projects and low-emission transport investments; Anhui Green Port and Shipping Demonstration Project (PRC) promoting smart, green, and resilient inland ports and clean-energy shipping.	Sustainable urban mobility plans, EV strategies, ITS deployment, digital twin development, emissions modeling, smart logistics systems, green port planning, climate-smart transport infrastructure.
Pacific	Ports, airports, maritime transport, resilience, connectivity, safeguards	Preparing Projects to Enhance Transport Connectivity and Resilience in the Pacific supporting the Suva Port Development Project (Fiji) and Rarotonga Airport Infrastructure Upgrade Project (Cook Islands) , with subsequent Phase 2 expansion across Pacific DMCs.	Port master planning, airport engineering, coastal resilience design, environmental and social safeguards, maritime transport planning, project management support, climate vulnerability assessments, institutional strengthening.



Opportunities: Procurement and Consulting Services

- Key takeaways

ADB-financed transport investments in Central and West Asia, East Asia, and the Pacific present a robust and evolving consulting market. Traditional engineering and supervision services remain important, but the fastest-growing opportunities lie in climate resilience, digital transformation, sustainable mobility, asset management, and institutional reform.

For consulting firms targeting ADB-financed transport projects,

- **Central and West Asia** offers the largest near-term pipeline in highways, railways, asset management, and construction supervision;
- **East Asia** presents the strongest demand for digital, smart, and low-carbon transport solutions; and
- **The Pacific** region provides a rapidly growing market for climate-resilient transport, maritime infrastructure, safeguards, and institutional strengthening.

Firms that combine strong technical credentials with digital innovation, climate expertise, safeguard compliance assessment capability, and effective local partnerships will be best positioned to capture future consulting opportunities and build long-term business relationships across the region.



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Thank you!

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