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ADB's Digital Sector Office

Where the private sector fits in ADB's digital operations

Presentation to German industry partners | 2026

Carolyn Florey, Digital Development Specialist, Digital Sector Office

ADB

Digital Sector Office

Sectors Department 2

A mandate to scale digital transformation, 2026–2030

Board-endorsed direction (Digital Transformation for Development, 2026) and Management's delivery framework (Digital ADB: An Operational Approach, July 2026)

11%

of ADB's committed operations had digital components in 2023, the Corporate Results Framework baseline

45%

of ADB projects tagged digital transformation Level 1 or 2 by Q2 2026, up from 29% in 2025

$20bn

Asia-Pacific Digital Highway by 2035

$1.4bn

DIG-led sovereign operations planned for 2029, growing from $158m in 2026

Three operational priority areas

Digital foundations

Connectivity, data infrastructure, policy and regulation, cybersecurity and privacy safeguards

DPI and platforms

Digital ID, payments, data exchange, digital skills, responsible use of AI

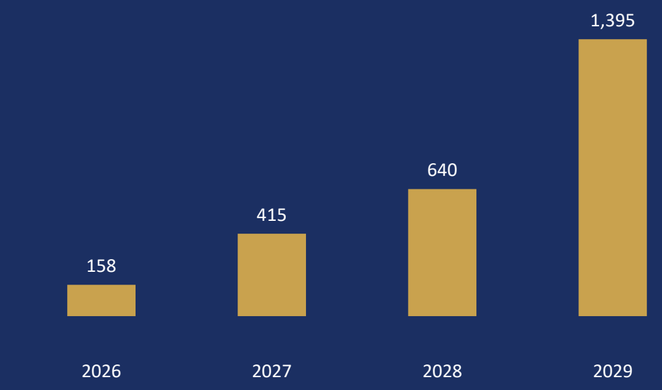
Sector outcomes

Public services, private sector and markets, climate resilience, regional public goods

The Digital Sector Office (DIG)

- Custodian of ADB's digital agenda with developing member countries: standards, diagnostics, knowledge, and the digital risk assessment of every digital operation
- Leads operations in digital and data infrastructure, core digital public infrastructure layers, cybersecurity and critical information infrastructure protection
- Co-leads and supports digital components with sector departments and with the Private Sector Operations Department for nonsovereign deals
- Leads ADB's engagement with technology providers for country operations

DIG-led sovereign operations, $ million



$541m

nonsovereign digital deals co-led with PSOD in 2026

2 platforms

Asia-Pacific Digital Highway and the Center for AI Innovation and Development

Sources: ADB Corporate Results Framework 2025–2030 indicator 7 (11% baseline) | DIG portfolio and digital tagging data, August 2026 | ADB news release, 3 May 2026 (Digital Highway) | Digital ADB operational approach, July 2026 (DIG roles).

Digital Sector Office Portfolio-at-a-Glance

Framed on ADB's Digital Transformation for Development Board Direction and Digital ADB approach

Digital transformation for a prosperous, inclusive, resilient and sustainable Asia and the Pacific

DIGITAL USE CASES

Cross-sectoral digital operations in DMCs

Digital Service Delivery

Sectoral digital applications: GovTech, trade, transport, social protection, health, agriculture

- **Nepal Digital Transformation**: about 11 high-impact services digitalized, first DIG-led loan and first ADB–World Bank Full Mutual Reliance project in South Asia ($40m ADB, $50m World Bank)
- **Kyrgyz Republic**: AI-enabled services in priority sectors, G2B services and e-permits (with the World Bank, $80m)
- **Uzbekistan UPGRADE:** AI-driven transformation priority sectors and tech startup ecosystem building ($200m)
- **Tajikistan:** Digitalization of the Agency for Social Protection ($20m)

DIGITAL ACCELERATORS

Amplifying the impact of digital technologies

Digital Public Infrastructure

- **Cambodia BRIDGE**: CamDX data exchange modernised, digital trade hub, public works digitization, NSDI ($50m)
- **Papua New Guinea:** SevisPass digital ID scale-up, SevisDEx exchange layer, eKYC and G2P payments ($20m, 2028–2032)
- **Nepal**: National ID upgrade, National Data Exchange, e-signature, social protection system

Digital Skills and Capabilities

- **Sri Lanka**: GovTech Digital Academy, training modules and upgraded training centres
- **Balochistan BEACON**: DigiBizz freelancing centres and Quetta Digital Park as a talent hub for youth and women
- **CAID**: 3 million people trained in digital and AI skills by 2035 ($20m)

DIGITAL FOUNDATIONS

Creating a strong base for DMC digital transformation

Digital and Data Infrastructure

- **Balochistan BEACON**: fiber to about 2,500 schools, colleges and offices plus Quetta Digital Park (Pakistan, $100m)
- **Sri Lanka**: Spectrum monitoring, QoS/QoE systems, LTE/5G site upgrades, government cloud ($98m)
- **Uzbekistan UPGRADE:** Provision of shared AI computing infra to start-ups through a modular AI data center ($200m)
- **Nonsovereign with PSOD**: India green data centers, Malaysia data center sukuk, Thailand green data center, Indonesia Linknet FTTH

Digital Policy and Regulation

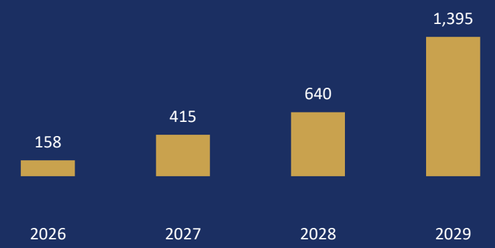
- **Kyrgyz** Digital Code and AI laws
- **PNG** Digital ID Act

Digital Safeguards

- **Bangladesh** national cybersecurity project (pipeline)
- **Sri Lanka** NCSOC, sectoral CSIRTs, Cybersecurity Regulatory Authority
- **Digital risk assessments** on every digital operation

Portfolio in numbers

DIG-led sovereign operations, $ million (2026–2029 pipeline)



$541m nonsovereign digital deals co-led with PSOD in 2026

11% → 45% share of ADB operations tagged digital transformation, 2023 baseline to Q2 2026 (Levels 1 and 2)

10 projects, 9 countries from Pakistan and Central Asia to Papua New Guinea, plus nonsovereign deals in India, Malaysia, Thailand and Indonesia

$20bn Asia-Pacific Digital Highway by 2035: $15bn ADB plus $5bn cofinancing

$40m in new trust funds: Korea $20m for CAID, Korea AI fund $10m, India digital fund $10m

How we invest

- Project and sector loans
- Sector development programs (policy-based plus investment loans)
- Cofinancing with the World Bank (FMRF) & DPs
- Nonsovereign loans and equity with PSOD
- Technical assistance, diagnostics and knowledge tools
- Regional platforms: Digital Highway, CAID

Crosscutting themes: Climate action | Private sector development | Regional cooperation and public goods | Resilience and empowerment

Sources: ADB, Digital ADB: An Operational Approach for Digital Transformation 2026–2030 (July 2026); Digital Transformation for Development Board Direction (2026); DIG team deck, August 2026; ADB project pages, September 2026. Pipeline amounts are indicative and subject to approval.

ADB

Digital and Data Infrastructure

Digital Foundations

Deployment of affordable, accessible and high-quality networks and compute: backbone, middle-mile and last-mile connectivity, satellite, data centers, power and cooling, disaster risk and resilience

What ADB finances under this pillar

- Fiber backbone and middle-mile networks under open-access and infrastructure-sharing rules
- Last-mile access for schools and public offices, with satellite or fixed wireless where fiber does not reach
- Data centers, government cloud and compute, with energy-efficient and climate-resilient design
- Spectrum management, quality-of-service monitoring and network upgrade subsidies
- Submarine cables and internet exchange points under the Asia-Pacific Digital Highway
- Diagnostics first: DIG's connectivity mapping tool designs networks and financial cases from georeferenced data

Illustration Pakistan | Balochistan Digital Ecosystem, Access, Connectivity and Opportunities (BEACON)

Three components, one integrated project

- Provincial fiber optic connectivity to government schools and administrative offices: approximately 2,500 sites, with additional sites to be identified. Initial phase of fiber has been funded.
- Quetta Digital Park: a high-performance smart building to anchor innovation and provincial digital transformation. Land acquisition and building design are funded. ADB support covers the operating model, construction and equipping, and start-up of operations
- DigiBizz expansion: additional centers, teacher training, devices, stipends and program roll-out to move the workforce into the digital economy

Intended results

- Meaningful digital access: fiber kilometers laid, buildings and people connected, internet use
- Ecosystem growth: technology and academic partnerships, tenants secured, operational sustainability
- Youth employment, women's economic participation: trainees graduated, centers opened, certifications, jobs

Modality	ADB financing	Timeline	Executing agency
Sovereign project loan (concept stage)	To be confirmed at fact-finding	Concept 2026, approval and start to be confirmed	Government of Balochistan (to confirm)

Where private partners fit

- Fiber EPC and outside-plant contractors for subsequent builds
- Optical transport, access and Wi-Fi equipment for approximately 2,500 sites
- Satellite and fixed-wireless backhaul for sites beyond the fiber footprint
- Digital park design, smart-building systems, compute and cloud, and anchor tenancy
- Private sector anchor tenants and partnerships for digital park
- Devices and learning platforms for DigiBizz centres, plus certification partners
- Operate-and-maintain contracts and network monitoring for the provincial network

Track it

Project page not yet public. Register interest with the Digital Sector Office

Sources: BEACON project concept overview slides (ADB, 2026). Financing, agencies and dates are not yet public and are shown as placeholders. Pillar definition from the Digital ADB operational approach, July 2026.

Digital Policy and Regulation

Enabling legal and regulatory frameworks: data governance, cybersecurity, privacy, consumer protection, telecoms, competition, interoperability, digital trade and AI

Digital Foundations

What ADB finances under this pillar

- Policy-based loans that disburse against completed reforms (prior actions agreed with government)
- Sector policies and regulations such as national masterplans, sector roadmaps, amendment of national laws or regulations
- Open standards, application programming interfaces and interoperability rules for digital government
- Infrastructure-sharing and open-access wholesale policies that lower rollout costs
- Regulatory institutions: data protection authorities, cyber regulators, spectrum and quality-of-service regimes
- Regional harmonization of rules for cross-border data flows and digital trade

Illustration PHI | Business Environment Strengthening through Technology (BEST)

Program frame

- Policy-based loan to improve ease of doing business through regulatory modernization, investment facilitation, and digital government reforms

Reform areas

- **Reduce regulatory burden and increase transparency** by streamlining permitting and licensing processes
- **Facilitate investment in priority sectors** through green-lane reforms, digital investment tracking, investor guidebooks, and measures to improve investment attractiveness in sectors such as digital infrastructure, renewable energy, critical minerals, and agriculture.
- **Deepen digital government services** for businesses through implementation of the e-Governance Act, accelerated eLGU rollout, digital payments integration, and broader government digital transformation

Why it matters to industry

- **Greater investor certainty and transparency** through streamlining of business processes and use of whole-of-government and interoperable digital platforms

Modality	ADB financing	Timeline	Executing agency
Policy-based loan	**$900m** (SP1 400M + SP2 500M, co-financing from KfW)	**2025-2028**	**DOF (with ARTA, BOI, and DICT as IA's)**

Where private partners fit

- Advisory/consulting services for the priority sector diagnostics under SP2 (e.g., agriculture and critical minerals)
- Development, modernization and O&M of investor and business-facing digital platforms
  - ARTA: PBRIS (business regulations portal), NEHEMIA (business process mapping and streamlining platform)
  - BOI: digital investor guidebooks, Digital Green Lanes platfor, digital landbank
  - DICT: eLGU and digital payment functions

Track it

https://www.adb.org/projects/59092-001/main

Sources: ADB Indonesia Country Partnership Strategy 2025–2029 (para. 44) | Digital ADB operational approach, July 2026. MAJU DIGI program details are not yet public and are shown as placeholders to be confirmed by the project team.

Digital Safeguards

Digital Foundations

Trusted and resilient digital systems and infrastructure: cybersecurity, data privacy and protection, critical information infrastructure protection, responsible AI

What ADB finances under this pillar

- National cybersecurity operations centers, computer emergency response teams
- Support to formulate action plans for protection of critical information infrastructure in energy, finance, transport and government
- Standards, procedures, security audits and tools for government systems
- Cybersecurity agency, with legal and regulatory drafting support
- Cyber skills, awareness and incident management across government
- Digital risk assessments on every ADB digital operation (slide 12)

Illustration Bangladesh | National cybersecurity project (pipeline)

Why Bangladesh

- Bangladesh is one of the fastest-digitalizing economies in South Asia, with increasing government services, payments expanding the attack surface. National cyber capacity has to scale at the same pace

Scope (indicative, TBC with further due diligence)

- Institutional and human capacity development for cybersecurity, including workforce training, certifications, and operational support for SOC and CERT
- Policy, regulatory, and institutional framework development, including cybersecurity standards, guidelines, and CII identification methodologies
- National cybersecurity operational readiness through establishment of SOC/CERT facilities and deployment of cybersecurity tools and systems

Related ADB support already in place

- Regional TA 58029-001, Support to Capacity Building and Implementation for Cybersecurity in DMCs, covers Bangladesh among its countries
- TA 60290-001 (forthcoming) BAN Advancing a Future Ready Digital Economy for Bangladesh

Modality	ADB financing	Timeline	Executing agency
Sovereign loan (to confirm)	**$55M**	**2027–2032**	**ICT Division / National Cyber Security Agency**

Where private partners fit

- Security operations platforms: SIEM, SOAR, threat intelligence and managed detection
- Security audits, penetration testing and certification against international standards
- Operational-technology security for power, water and transport operators
- Cybersecurity training and certification for government agencies
- Note: bidders must show security and privacy by design, a digital risk assessment requirement

Track it

Project page not yet public. Related TA: adb.org/projects/58029-001. Register interest with DIG.

Sources: ADB project 58029-001 and 60315-001 pages (September 2026) | ADB project 59334-001 (Metacore). Bangladesh cybersecurity project details are not yet public and are shown as placeholders.

Digital Public Infrastructure

Digital Accelerators

Digital ID, digital payments and data exchange for interoperability and integration, built on open, standards-based architectures with privacy and security by design

What ADB finances under this pillar

- National data exchange platforms and API gateways (CamDX, Nepal National Data Exchange, PNG SevisDEx)
- Foundational and functional digital ID, e-signature and verifiable credentials
- Government-to-person payments, eKYC and integration with banks and telecoms
- Platform stewardship: governance, financing and operating models, including PPP and utility structures
- Sector use cases on top of DPI: social protection, business registration, trade and transport
- Partnerships with the Centre for Digital Public Infrastructure and Co-Develop for open building blocks
- Partnerships with UNDP for DPI Stewards program across select DMCs

Illustration Cambodia | Building Resilience for Integrated Digital Governance and Efficiency (BRIDGE) Sector Development Program

Results chain

- Impact: government service delivery efficiency and citizen trust enhanced through inclusive, resilient and integrated digital transformation
- Outcome: integrated, secure and interoperable digital government infrastructure enables efficient, trusted and citizen-centric services
- CamDX and cybersecurity, data protection and data governance enhanced and digital skills, leadership and sectoral use cases expanded

What the investment loan buys

- CamDX modernised with cloud-ready architecture, real-time data synchronisation and standardised APIs
- National Security Operations Centre, Network Operations Centre and digital forensics laboratory operationalised, with national cybersecurity standards and incident response
- Sector use cases: Ministry of Commerce National Digital Trade Hub (registration, licensing, customs, e-payment) and digitized waterways and bridge networks at the Ministry of Public Works and Transport

Targets by 2030: CamDX uptime 95% to 99%, transactions doubled from 500,000 a month, 30 ministries connected, SOC and NOC covering 60% of critical government systems

Modality	ADB financing	Timeline	Executing agency
Sector Loan	**$50m**	**Approval expected 30 Oct 2026, implementation 2028–2032**	**Ministry of Economy and Finance**

Where private partners fit

- Data exchange, API management and integration platforms
- Government cloud and hosting for CamDX
- eKYC, eKYB and digital signature components for the trade hub
- Training partners for the digital academy and certification
- Procurement risk rated substantial: early engagement on packages pays

Track it

adb.org/projects/59358-001

Sources: ADB project 59358-001 data sheet and concept paper (December 2025), accessed September 2026. Figures are pre-approval and subject to change.

Digital Skills and Capabilities

Digital literacy and skills for workforce development, institutional capability to adopt and run platforms, reskilling in response to AI

Digital Accelerators

What ADB finances under this pillar

- Government digital academy, training modules and upgraded training centers
- Digital literacy and awareness campaigns, with targets for women, youth and rural communities
- Job-readiness and freelancing programmes (DigiBizz in Balochistan, Kyrgyz digital skills)
- Capacity of regulators and operators: data protection authorities, CERTs, platform teams
- Structured knowledge transfer and handover to local operators as a condition of sustainability
- CAID: 3 million people trained in digital and AI skills by 2035 under the Digital Highway

Illustration Sri Lanka | Advancing Digital Transformation Project, Output 2

Results chain

- Impact: inclusive and secure digital economy developed (National Digital Economy Blueprint targets a $15bn digital economy, $5bn digital exports and a 200,000-strong digital workforce by 2030)
- Outcome: inclusive and equal use of resilient and secure digital government services by women, underserved communities in rural and remote areas, and businesses increased
- Output 2: institutional capacity building to support the digital economy developed

Whole-of-government digital capacity

- GovTech Digital Academy established, with digital training modules for public officials
- Upgrade of existing government training centres
- Public awareness and digital literacy campaigns

Digital safeguards capacity

- Institutional capacity of the Data Protection Authority and Sri Lanka CERT increased, a Cybersecurity Regulatory Authority established, and legal, regulatory and policy work to build digital trust

Output 1 (infrastructure) finances spectrum management, QoS/QoE systems, LTE and 5G site upgrades, a secure government cloud and the national cybersecurity operations centre

Modality	ADB financing	Timeline	Executing agency
Sovereign sector loan	**$98m ordinary capital resources (proposed)**	**Fact-finding Apr–May 2026, five-year implementation**	**Ministry of Digital Economy. IAs: MODE, TRCSL, GovTech, SLCERT, DPA**

Where private partners fit

- Curriculum, e-learning platforms and certification for the GovTech Digital Academy
- Vendor academies for cloud, cybersecurity and AI skills, delivered with local institutions
- Training center equipment and simulation labs
- Train-the-trainer and change management services for 5 implementing agencies
- Under Output 1: spectrum monitoring, QoS measurement, radio equipment, cloud and SOC platforms

Track it

adb.org/projects/59280-001. Tenders will appear after Board approval and loan effectiveness.

Sources: ADB project 59280-001 data sheet and social due diligence report (August 2026) | project overview slide (ADB, 2026). Amounts are proposed and subject to Board approval.

Digital Service Delivery

Sectoral digital applications: GovTech, trade, transport, social protection, health, education, agriculture, finance, disaster response

What ADB finances under this pillar

- Re-engineering and digitalization of high-impact government services on national platforms
- Citizen portals, apps and digital lockers linked to national ID and data exchange
- Integrated social registries and government-to-person payments
- Sector systems: land administration, business registration, transport licensing, e-procurement
- AI-enabled analytics for service delivery where data readiness allows
- Cofinancing frameworks with the World Bank that let one procurement regime serve both lenders

Illustration Nepal | Digital Transformation Project (ADB–World Bank Full Mutual Reliance Framework)

Results chain

- Objective: improve the delivery and increase the use of inclusive and high-impact services for citizens and businesses across Nepal by strengthening DPI and modernizing priority services. Outcome: digital government strengthened
- Output 1: secure data infrastructure. Output 2: core digital public infrastructure. Output 3: digitalization of high-impact services

What the $90m finances (indicative component costs)

- Government data center modernization and hybrid government cloud ($27m), cybersecurity ($10m)
- National ID system upgrade ($10m), integrated social protection system ($5m), e-signature ($4m), National Data Exchange ($5m), Nagarik citizen app ($4m)
- Business process re-engineering and digitalization of about 11 priority services ($15m): business registration, land administration, driving licenses, social security, health insurance, tax, passports and more, plus land administration digitalization ($5m)

Firsts: first ADB–World Bank Full Mutual Reliance project in South Asia and the first loan led by the Digital Sector Office. Targets include 2.5 million women using digital services and 5,000 women officials trained

Modality	ADB financing	Timeline	Executing agency
Sovereign project loan, World Bank lead lender, ADB trail lender	$40m concessional OCR plus $50m World Bank IDA, total $90m	Approved 10 Mar 2026, effective 10 Jul 2026, closing 31 Jul 2031	Ministry of Communication and IT. IAs: DoIT, National Cybersecurity Center, DoNIDCR

Where private partners fit

- Data center, cloud and cybersecurity systems for the government hosting layer
- Identity, biometrics, e-signature and PKI for the national ID and credential layer
- Data exchange and API platforms, citizen app and portal development
- Service re-engineering, systems integration and change management for 12 services
- Universal procurement under World Bank rules: track World Bank STEP tenders, not only ADB

Track it

adb.org/projects/59512-001 and World Bank P511767 (STEP tenders under World Bank rules).

Sources: ADB project 59512-001 data sheet, report and recommendation of the President and news release of 10 March 2026 | World Bank project appraisal document P511767 (component costs).

Asia-Pacific Digital Highway

ADB's flagship regional platform for cross-border connectivity and data infrastructure, announced at the Annual Meeting in Samarkand on 3 May 2026 as part of a $70bn push with the Pan-Asia Power Grid Initiative

$20bn

mobilised by 2035: $15bn from ADB's own resources and $5bn cofinancing, including private capital

650m

people reached: 200m with broadband for the first time and 450m with faster, more reliable connections

40%

lower connectivity costs in remote and landlocked areas

4m jobs

expected, and 3m people trained in digital and AI skills, with a focus on youth and women

What gets built

Terrestrial and subsea fiber

Cross-border fiber backbones and submarine cables that give landlocked and island economies more than one route to the internet

Satellite links and last mile

Satellite and wireless access where fiber does not reach, integrated with national networks

Internet exchange points and regional data centers

Keep traffic and data in the region, lower latency and cost, and host the compute that AI services need

Trust and skills

Cybersecurity, data frameworks and governance, plus digital and AI skills, built in from the start

How it is operationalized

- Regional technical assistance ($1m, May 2026 to April 2030) prepares corridor architectures and governance across regional cooperation initiatives (ASEAN, CAREC, GMS, BIMSTEC and SASEC) in 15 countries, with at least one investment project per subregion by 2030
- Green data centers named as an investment priority in the TA
- Financing: sovereign loans, nonsovereign deals, cofinancing, and ADB's first Digital Solutions Bond ($100m, June 2026)

Where private partners fit

- Cofinancing and co-investment in cable, IXP and data center projects through the $5bn window
- Submarine and terrestrial fiber systems, optical transport and IXP equipment
- Satellite capacity and ground segment for island and mountain economies
- Data center design, energy-efficient cooling and renewable supply
- Cybersecurity and network management for cross-border corridors

Sources: ADB news release "ADB Launches $70 Billion Push to Connect Asia's Power Grids and Digital Networks", 3 May 2026 | President Kanda's speech, 3 May 2026 | ADB TA 60113-001 report (May 2026) | Digital Solutions Bond release, 24 June 2026.

ADB

Center for AI Innovation and Development (CAID)

A regional hub for trusted AI adoption, established by DIG with the Republic of Korea and embedded in the Digital Sector Office

$20m

contribution from the Republic of Korea, memorandum signed with the Korean Deputy Prime Minister in Samarkand, 3 May 2026

Seoul

base for the Center under Korea's innovation hub, drawing on Korean AI institutions and industry

3m

people trained in digital and AI skills by 2035, the Digital Highway target CAID supports

$10m

Korea AI for Development trust fund over five years to finance CAID activities, alongside India's $10m digital fund

Three core areas

Foundations

Enable AI-ready foundations

- Infrastructure diagnostics and technical guidance on compute, cloud and data
- AI policy, governance and institutional readiness
- Access to shared compute, data platforms and sandboxes

Solutions

Build AI solutions and capabilities

- Design and prototyping of priority AI use cases with governments
- Sector pilots in health, agriculture and climate
- Testing, validation and refinement before scale-up

Skills

Scale adoption and partnerships

- Structured training and advisory for ADB staff and country officials
- Technology partnerships with Korean and global AI firms and institutions
- Regional replication and knowledge exchange

Where private partners fit

- Technology partnerships: models, tooling and compute for pilots
- Co-developing sector AI pilots with governments
- Training content and certification for the 3 million target
- Digital Learning Labs (challenges.adb.org) for proofs of concept with ADB teams
- Related TA: AI RISE (60315-001, proposed, 12 countries) and Empowering DMCs through AI Solutions (58497-001, $1.65m)

AI is the fastest-moving part of the portfolio. Every AI component ADB finances is assessed for model governance, bias testing, human oversight and auditability, proportional to risk.

Sources: ADB news release and President Kanda's speech, 3 May 2026 | Korean press on the ADB–Korea memorandum (May 2026) | DIG team deck, August 2026 (core areas, trust funds). Trust fund establishment is in progress and amounts are indicative.

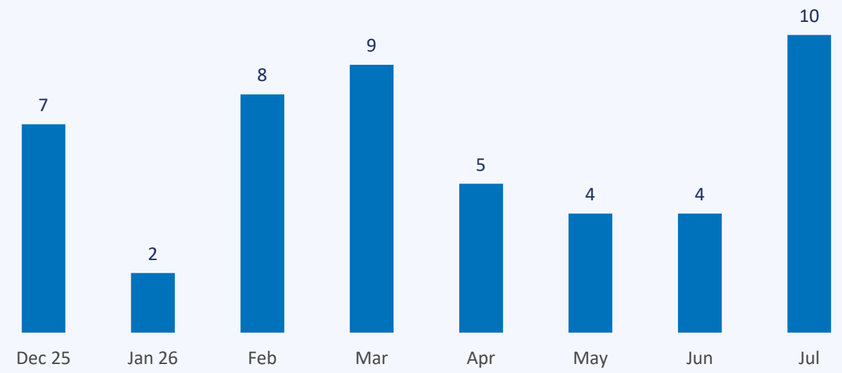
ADB

Digital risk assessment: the standard every digital project must meet

DIG leads a digital risk assessment at key stages of every ADB operation with a material digital component, aligned with the Environmental and Social Framework (effective 1 January 2026)

Demand is rising with the portfolio

Digital risk assessments requested per month



49 assessments in eight months, each one a project where DIG shapes the digital design before approval

29% → 38% of ADB projects tagged Digital Transformation Level 1 or 2, 2025 to Q2 2026

Q3 2026 assurance gates embedded in the project lifecycle

What the assessment checks

Cybersecurity

Accountability for and capacity to manage digital risk, policies, processes, inventory of digital assets & data, threat assessment, controls, incident management

Interoperability & Open Standards

Agreed technical, data and governance standards with documented integration pathways

Privacy / Data Protection

Lawful bases for processing personal data, notice, purpose limitation, data minimization, retention limits, data subject rights, data sharing & transfers

Vendor lock-in mitigation

Modular procurement, portability requirements, transparent intellectual property licensing

Data Management

Coherent data architecture, lawful reuse and sharing, stewardship and operation and maintenance capacity

Responsible AI

Model documentation, bias testing, human oversight and auditability, proportional to risk

What it means for suppliers

- Bids that document open standards, portability, security- and privacy-by-design and accessibility clear the gates faster. Proprietary stacks without an exit path are a flagged risk
- From 1 January 2026 all internationally advertised ADB-financed contracts use merit-point criteria, with technical weighting of at least 50% for high-risk procurements: quality and lifecycle cost count, not the lowest price alone
- AI components need model documentation, bias testing and human oversight built into the offer

Sources: Digital ADB operational approach, July 2026 (Table 1 operational standards, Management commitment on digital risk gates) | DIG digital risk assessment tracking, August 2026 | ADB news release on merit-point criteria, 2025 | ADB Environmental and Social Framework (approved November

ADB

Five ways German companies work with ADB's digital operations

Supply to sovereign projects

- Goods, works and consulting under project loans: ADB awarded 7,556 contracts worth nearly $6bn in 2024
- Tenders at adb.org/projects/tenders, consultants through the Consultant Management System
- Merit-point criteria since January 2026 reward quality and lifecycle cost
- Largest German suppliers 2021–2025: GKW Consult ($16.6m), Siemens ($10m), GOPA ($7.5m), Strabag ($5.1m)

Invest alongside ADB

- Nonsovereign loans and equity co-led by DIG and PSOD: Linknet FTTH Indonesia , Terabyte green data centers India, Malaysia data center sukuk, Thailand green data center
- ADB Ventures for early-stage climate and digital technology

Structure PPPs

- Transaction advisory through the Office of Markets Development and PPP and the Asia Pacific Project Preparation Facility

Cofinance

- KfW–ADB cofinancing target of $10bn for 2014–2028
- German cofinancing 2021–2025: $2.99bn sovereign (11 projects) and $5.66bn nonsovereign (22 projects)
- GIZ–ADB memorandum (October 2025) names digital transformation as a field of cooperation

Partner on knowledge and pilots

- Technology partnerships under CAID and the Digital Highway
- Digital Learning Labs for proofs of concept with ADB teams (challenges.adb.org)
- Existing partners include ESA, JAXA, GSMA, ITU, the Centre for DPI and Co-Develop

Next steps

Business Opportunities Fair, ADB headquarters, Manila, 21–24 September 2026 • ADB and Europe: Stronger Together, 21 September 2026 • **ADB–Germany Roadshow Private Sector Day with BMZ, Berlin, 1 October 2026**

Contact the Digital Sector Office to be added to the digital procurement watch list for Cambodia, Sri Lanka, Nepal and the Digital Highway pipeline, or to propose a pilot under CAID.

Sources: ADB–Germany fact sheet (April 2026, data as of 31 December 2025) | ADB annual procurement report 2024 | ADB project pages 59177-001, 60063-001, 59434-001, 58183-001 | ADB event pages for the 2026 Germany Roadshow and Business Opportunities Fair | ADB European Representative



Thank you

Digital Sector Office, Sectors Department 2, Asian Development Bank

ADB Digital Sector Office