

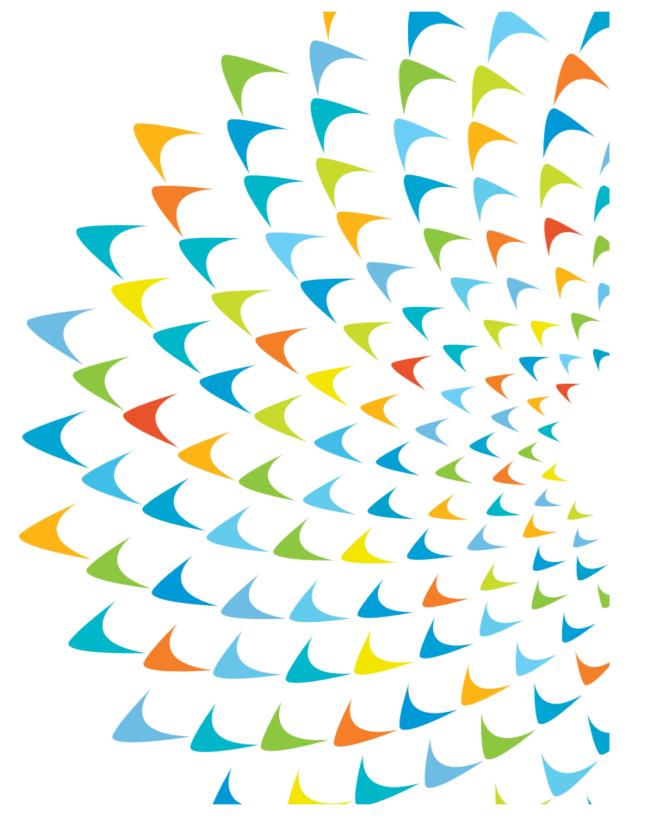
Assolombarda, Milan 27 November 2018

The Asian Development Bank Business Opportunities

Samantha Hung, Deputy Representative ADB European Representative Office

Prosperous Inclusive Resilient Sustainable

Asia and the Pacific



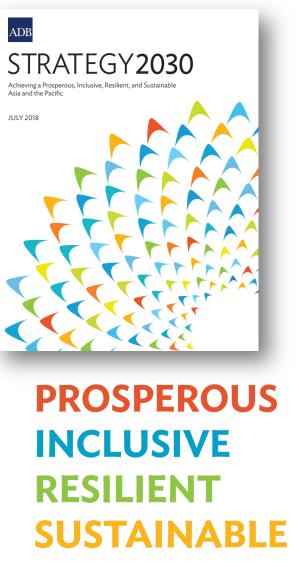
Asia and the Pacific - Poverty Challenge

- Around 40% of the world's extreme poor live in Asia and the Pacific - 326 million live on less than \$1.90/ day
- 64% of world's population which is undernourished, 35% without access to electricity, 63% without basic sanitation



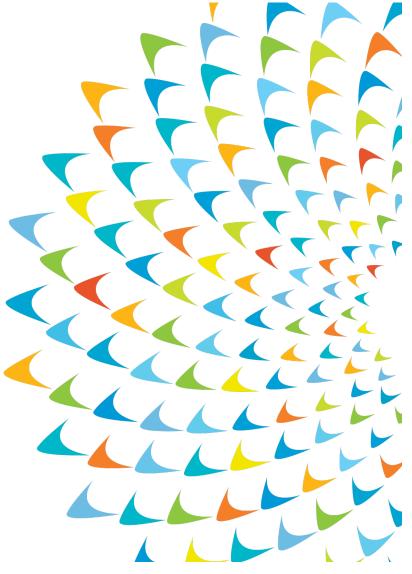


ADB's STRATEGY 2030 VISION



ASIA AND THE PACIFIC

while sustaining efforts to eradicate extreme poverty.





ADB's STRATEGY 2030 VISION





STRATEGY 2030 - 7 operational priorities:

-

Addressing remaining poverty and reducing inequalities



Accelerating progress in gender equality

At least 75% of committed operations by 2030

At least 75% of committed operations by 2030, \$80 billion from own resources from 2019–2030



Tackling climate change, building climate and disaster resilience, and enhancing environmental sustainability



Making cities more livable



Promoting rural development and food security



Strengthening governance and institutional capacity



Fostering regional cooperation & integration



Sector and Thematic Operational Frameworks

www.adb.org/focus-areas

Infrastructure



Energy Energy demand is projected to almost double in the Asia and Pacific region by 2030. There is an urgent need for innovative ways to generate power in a socially, economically, and environmentally sustainable manner. More »



Information and Communications Technology

Rapid advances in information and communications technology (ICT) have created tremendous opportunities for economic and social gains in the world's poorest areas. A key infrastructure of knowledge-based economies, ICT is a driving force for rapidly growing new sectors. More »



Transport

Asian countries need sustainable transport systems – trains, buses, ferries, bike paths – that move people in a low-carbon, safe, accessible, and affordable way. Learn about the issues facing the sector, ADB's support for sustainable transport, and see video and multimedia presentations of the region's transport systems. More »



Urban Development

Cities generate over 80% of gross domestic product (GDP) in many countries of the Asia and the Pacific and are engines of economic growth that have lifted millions from poverty. But as they swell in size and number they are under increasing strain. More »



Water

Water is one of our most precious resources, but it is threatened by growth, misuse, and pollution. In Asia and the Pacific, many countries are in a water crisis and the demand for water is huge and growing. More »

Other Focus Areas



Agriculture and Food Security

ADB's efforts and strategy to achieve food security in the region emphasizes on the integration of agricultural productivity, market connectivity, and resilience against shocks and climate change impacts as the three pillars to achieve sustainable food security. More »

Climate Change and Disaster Risk Management

Meeting the growing demand for energy and natural resources is destabilizing our climate, and threatening the development of Asia and the Pacific. The poor are particularly vulnerable to these changes and are already suffering from rising sea levels and increasingly devastating storms, droughts, and floods. More »



Education

Most developing countries in Asia and the Pacific have earned high marks for a dramatic rise in primary education enrollment rates in the last three decades, but daunting challenges remain, threatening economic and social growth. More »

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Environment

Environmental sustainability is a prerequisite for economic growth and poverty reduction in Asia and the Pacific. ADB's longterm strategic framework for 2008-2020 identifies environmentally sustainable growth as a key strategic development agenda, and environment as a core area for support. More »



Finance Sector

ADB has been supporting Financial Sector Development of developing member countries in the Asia and Pacific region in many ways. Financial sector operations since 1966 have accounted for about 10% of total ADB operations. More »



Gender and Development

Gender equality and women's empowerment are essential for meeting Asia's aspirations of inclusive and sustainable development. Gender equality needs to be pursued in its own right for a just and equal society, and for better development outcomes. More »



Governance and Public Management

Poor governance holds back and distorts the process of development, and has a disproportionate impact on the poorer and weaker sections of society. Assisting developing countries in improving governance is therefore a strategic priority of ADB in its work to eliminate poverty in Asia and the Pacific. More »



Health

Health is a human right and is essential to development. Good health improves learning capacity, worker productivity, and income. ADB is committed to improving health in Asia and the Pacific by supporting better governance and spending, infrastructure development, and regional collaboration to control communicable diseases. More »



Public-Private Partnerships (PPP)

Public-private partnerships can play an important role in addressing infrastructure needs in developing Asia and the Pacific. More »



Regional Cooperation and Integration

Regional cooperation and integration (RCI) is a process by which national economies become more interconnected regionally. RCI plays a critical role in accelerating economic growth, reducing poverty and economic disparity, raising productivity and employment, and strengthening institutions. More »

Social Development and Poverty

Despite substantial improvements in living standards across Asia and the Pacific, hundreds of millions are still excluded from the benefits of rapid economic growth. The region needs social development programs to reduce poverty, inequality, and vulnerability among the poor. More »



Other key priorities & approaches



Expanding private sector operations



1/3 of ADB operations by 2024



Catalyzing and mobilizing financial resources for development

by \$2.50 of cofinancing



Strengthening knowledge services







Differentiated approaches

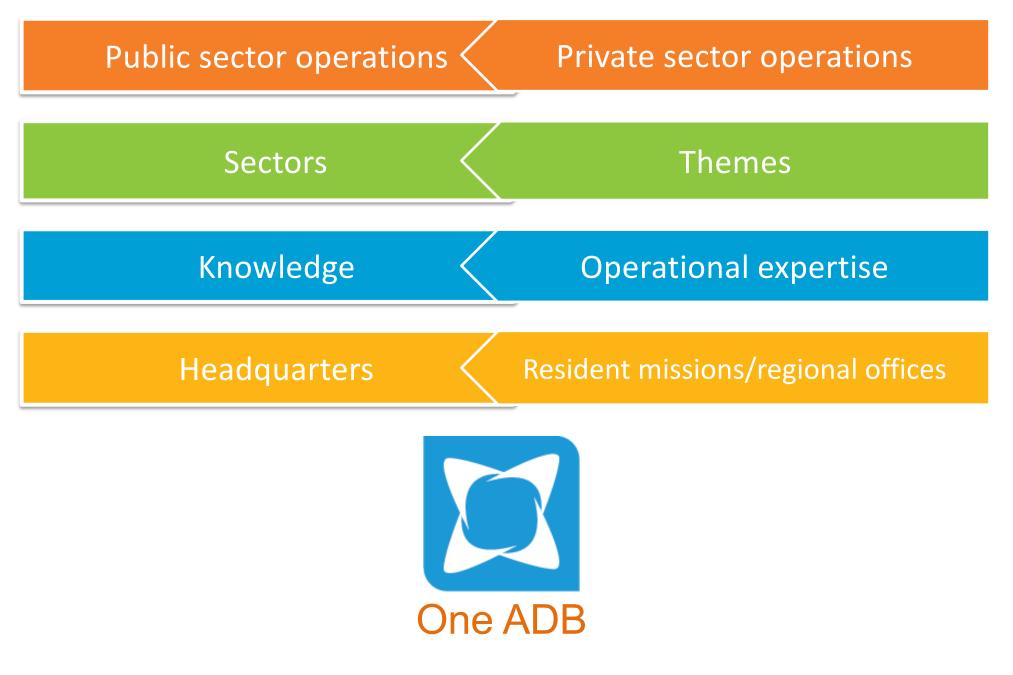


Targeted approaches to pockets of poverty and fragility at subnational level





Delivering through One ADB





FOUNDED IN 1966



- 67 members; 48 in the region
- 40 borrowing members
- Japan and the United States are the 2 largest members



ORGANIZATION



- Board of Governors
- Board of Directors
- President

- Senior Management
- 3,227 employees,
 spanning 60 nationalities









ADB's LOCALCHARACTER



- Focus on Asia and the Pacific
- Concern for small economies
- Promoting regional & subregional cooperation
- Developing domestic bond markets



ADB's CORE BUSINESS



- Finance
- Knowledge
- Partnerships



SPECIAL FUNDS



- Asian Development Fund (ADF)
- Technical Assistance Special Fund (TASF)
- Japan Special Fund (JSF)
- ADB Institute Special Fund (ADBI)

- Regional Cooperation and Integration Fund (RCIF)
- Climate Change Fund (CCF)
- Asia Pacific Disaster Response Fund (AFDRF)
- Financial Sector Development Partnership Special Fund (FSDPSF)



ADB's 2017 OPERATIONS





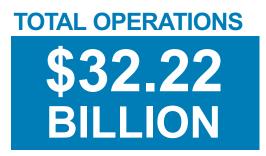
- \$20.01 billion in loans and grants and others
- **\$201 million** for technical assistance
- **\$11.92 billion** from cofinancing partners



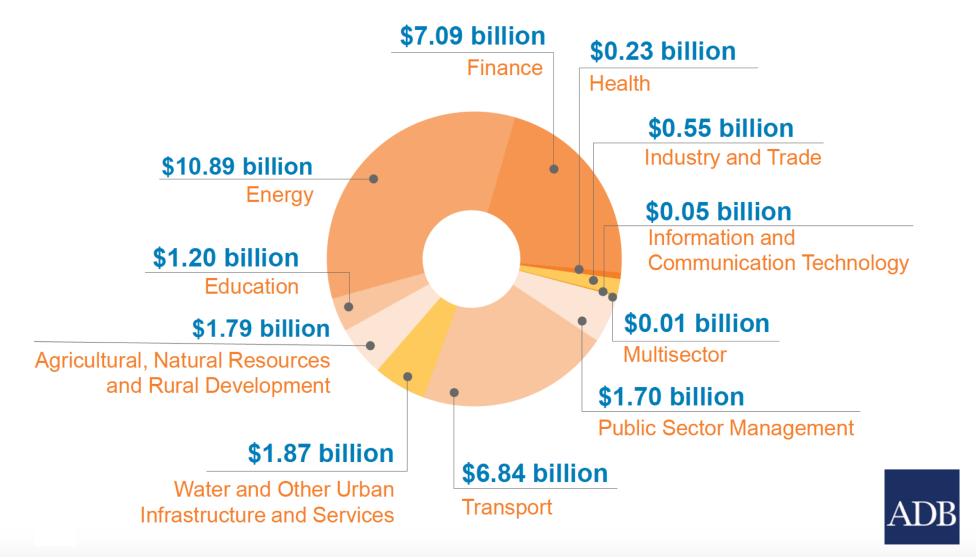
ASSISTANCE BY REGION TOTAL OPERATIONS \$32.22 BILLION \$0.71 billion Regional \$7.91 billion Central and West Asia \$3.87 billion **East Asia** \$10.65 billion South Asia \$8.17 billion Southeast Asia \$0.91 billion Pacific



ASSISTANCE BY SECTOR



ADB

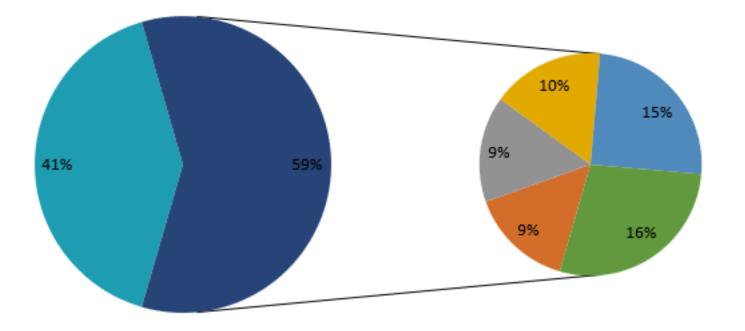


LARGEST BORROWERS – BY COUNTRY

	Largest Borrowers			
2014	2015	2016	2017	
India	India	India	PRC	
PRC	PRC	PRC	India	
Pakistan	Pakistan	Indonesia	Pakistan	
Viet Nam	Indonesia	Pakistan	Indonesia	
Philippines	Bangladesh	Azerbaijan	Bangladesh	
Bangladesh	Kazakhstan	Bangladesh	Philippines	



PORTFOLIO DISTRIBUTION - by LARGE COUNTRIES



■ Others ■ Viet Nam ■ Pakistan ■ Bangladesh ■ People's Republic of China ■ India



Why pursue ADB-Financed Contracts?

- Gateway to new opportunities in fast growing emerging economies across multiple sectors
- Availability of funds assured
- Internationally accepted procurement procedures
- Risks related to transparency, fairness and integrity of procurement process mitigated through ADB oversight



Finding ADB Business Opportunities

http://www.adb.org





Asian Economies Extend their Dominance of Global GDP Growth

Asia and the Pacific accounted for 40.9% of global GDP in 2016, up from 29.4% in 2000, according to ADB's latest economic data. Read more >>

News Upcoming Events

18 Dec 2017 | News Release ADB to Improve Economic Connectivity, Standard of Living in Viet Nam's Northeastern Provinces

15 Dec 2017 | News Release ADB \$380 Million Loan to Improve Roads in Mindanao, Philippines

14 Dec 2017 | News Release ADB Approves Third Loan to Establish Facility for Improved Air Quality in Greater Beijing Area

14 Dec 2017 | News Release ADB Bolsters Microfinance Program with \$100 Million in Additional Financing

MORE NEWS »



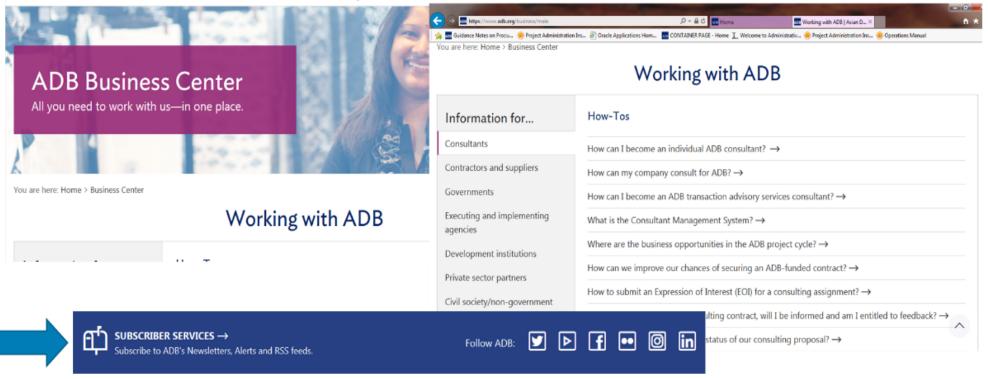
Resources For

- » Bond Investors
- » Businesses
- » Civil Society
- » Job Seekers
- » Journalists
- » Private Sector Project Investors
- » Independent Evaluation

ADB Business Center



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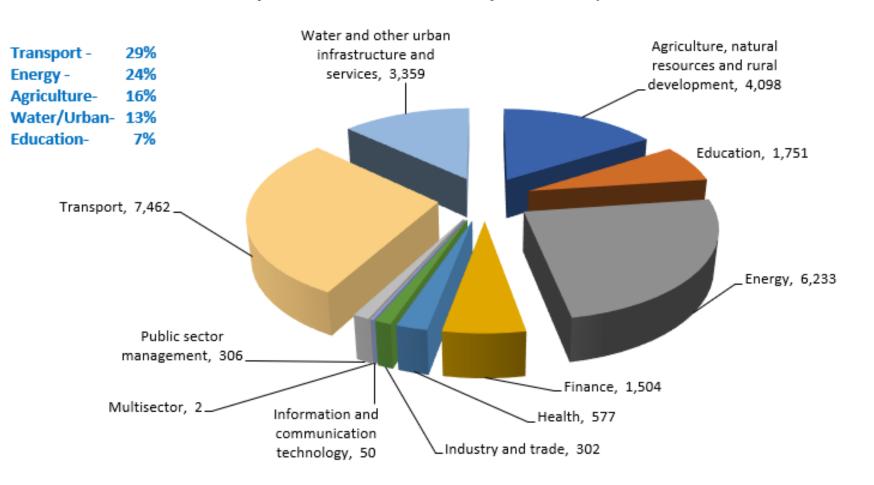


Finding ADB Business Opportunities

About ADB News & Events Da	ata & Research Publications Countries Projects & Tenders	Focus Are	as ADB Institu	te
Tenders Projects Project Data Sheets for Loans,	Grants, TAs Project Documents Procurement Plans, Reports, Safeguards, etc.	U Pr	enders ocurement of Goods, rvices	Works, and Consulting
4,728 tenders displayed				٩
N RSS	Title	Status	Date Posted	Deadline
C Reset all filters	48223-001 India Transmission Improvement Projects in Odisha and Tamil Nadu	Active	11 Jan 2018	17 Jan 2018
Country	49378-001 Regional Survey Specialist for Post Impact Evaluation Survey (National)	Active	11 Jan 2018	17 Jan 2018
All countries	51364-001 Kazakhstan International Water Institutional Expert (IE)	Active	11 Jan 2018	17 Jan 2018
Procurement Group	51392-001 Regional Urban Planner and National Coordinator	Active	11 Jan 2018	17 Jan 2018
All groups	51392-001 Regional Project Management Coordinator	Active	11 Jan 2018	17 Jan 2018
All types 🔹	49380-001 Georgia Financial Inclusion for Micro and Small Business Growth for Credo, Finca Bank, and TBC Bank (CDTA)		11 Jan 2018	25 Jan 2018
Sector All sectors	50405-001 Regional Supporting the Development of Asian Bond Markets through AsianBondsOnline	Active	11 Jan 2018	17 Jan 2018
Status	51392-001 Regional Environmental and Climate Change Specialist	Active	11 Jan 2018	17 Jan 2018
All statuses •	50405-001 Regional Supporting the Development of Asian Bond Markets through AsianBondsOnline	Active	11 Jan 2018	17 Jan 2018
All Dates •	51392-001 Regional Urban Planner and National Coordinator	Active	11 Jan 2018	17 Jan 2018

BUSINESS OPPORTUNITIES - **BY SECTOR**

Uncontracted Loan and Grant Funds - by Sector (in US\$ million at 30 Jun 2018) - Total = \$25,645M





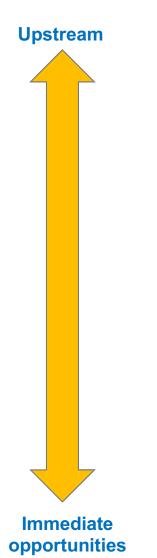
BUSINESS OPPORTUNITIES - **BY COUNTRY**

Uncontracted Loan & Grant Funds - by Country (in US\$ million at 30 Jun 2018 - Total = \$25,645M 6,000 PRC- 20% PAK - 11% 5,055 8% 5,000 UZB-8% VIE-7% INO-4,000 2,740 3,000 2,098 2,054 1,774^{1,918} 1,855 2,000 1,371 ..265 ⁸⁴⁶ 708 1,000 709 ³⁴⁴ 218 440 127 281 396 336 333 253 ¹⁷⁵ 2 31 5 113 16 9 16 29 22 23 0.1 27 0 al and the set of the

ADB

How to find Procurement of Works & Goods Opportunities?

- Country Partnership Strategy
- Country Operations Business Plan
- Procurement Plans
- Specific Procurement notices
 Invitation for Prequalification
 Invitation for Bids
- Hop-on Opportunities
 Prequalified Contractors
 - ✓ Contracts Awarded





How to find Consulting Services Opportunities?

- 1. Collect relevant business intelligence
- 2. Build your brand name
- 3. Express interest
- 4. Know the country of the assignment and project site
- 5. Offer partnership to firms likely to be shortlisted
- 6. Prepare a responsive and strong technical proposal
- 7. Focus on Performance



ITALY – Share of procurement

Italy's Share of Procurement Contracts for Loan, Grant, and Technical Assistance Projects

	2	2016		2017		Cumulative (as of 31 Dec 2017)	
Item	Amount (\$ million)	% of Total	Amount (\$ million)	% of Total	Amount (\$ million)	% of Total	
Goods, Works, and Related Services	90.68	0.80	102.19	0.98	1,466.28	0.87	
Consulting Services	9.63	1.53	28.89	3.89	173.39	1.44	
Total Procurement	100.32	0.84	131.08	1.17	1,639.67	0.91	



ITALY – Top 5 contractors/suppliers

Top 5 Contractors/Suppliers from Italy Involved in Goods, Works, and Related Services Contracts under ADB Loan and Grant Projects, 1 January 2013–31 December 2017

Contractor/Supplier	Sector	Contract Amount (\$ million)
Todini Construzioni Generali S.P.A	TRA	144.48
Cooperativa Muratori Cementisti Di Ravenna	wus	129.88
Tirrena Scavi S.P.A	TRA	27.45
Serenissima Construzioni S.P.A.	TRA	19.94
Valvitalia S.P.A.	ENE	10.63
Others		16.79
Total		349.19

ENE = energy, TRA = transport, WUS = water and other urban infrastructure and services.



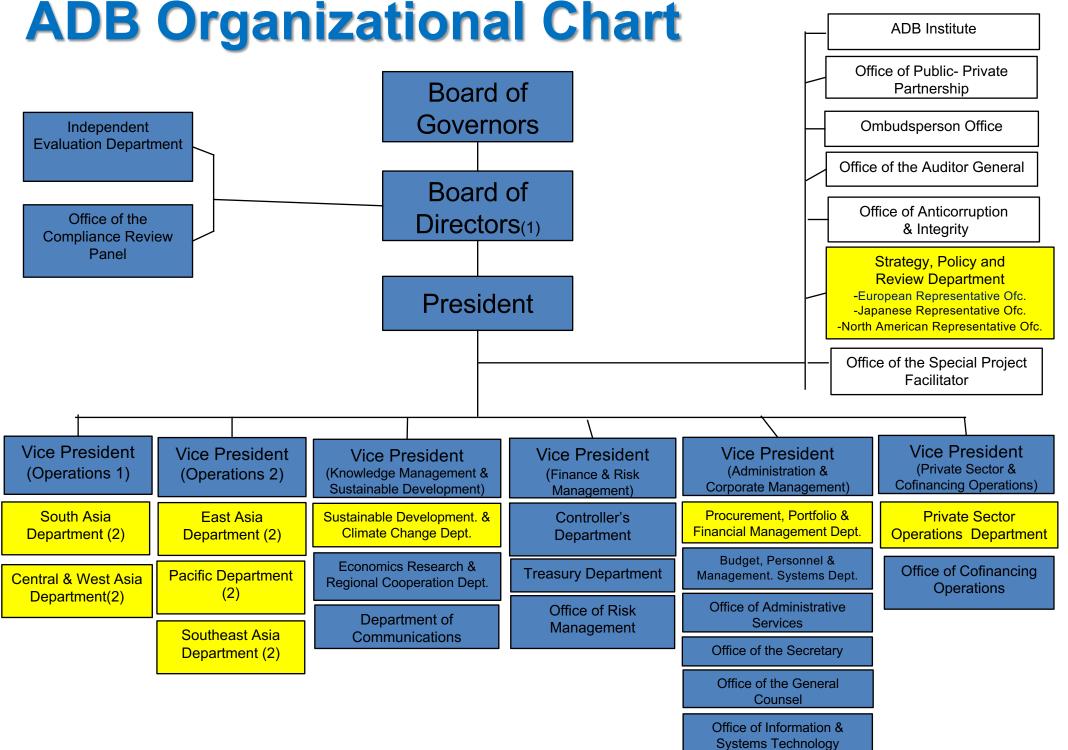
ITALY – Top 5 Consultants

Top 5 Consultants from Italy Involved in Consulting Services Contracts under ADB Loan, Grant, and Technical Assistance Projects, 1 January 2013–31 December 2017

Consultant	Sector	Contract Amount (\$ million)
IRD Engineering S.R.L.	TRA, WUS	22.95
SPEA Engineering S.P.A.	TRA	9.88
Anas Intl., Gestione Progetti & IRD Engr. (JV)	TRA	8.38
ELC Electroconsult S.P.A. & Newjec Inc. (JV)	ENE	7.27
Italferr S.P.A. and Tecnic Consulting (JV)	TRA	3.50
Individual Consultants		5.23
Others		6.69
Total		63.90

ENE = energy, TRA = transport, WUS = water and other urban infrastructure and services.







European Representative Office (ERO)

One stop for European stakeholders to engage ADB Regular consultations with key stakeholders Supporting & building partnerships Knowledge sharing events in Europe, such as: Knowledge forums, workshops Launch of flagship publications Business Opportunity Seminars Recruitment events

+49 69 2193 6400 www.adb.org/ero Twitter:@ADB_Europe



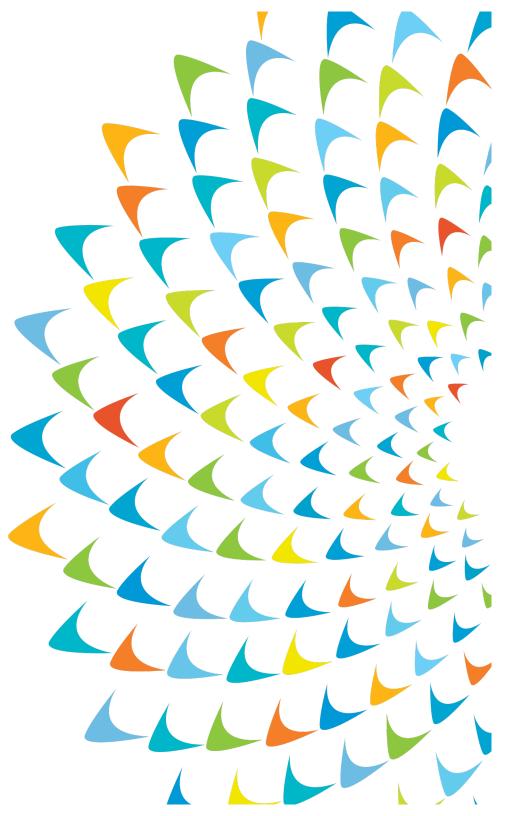




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Thank you





Annexes: Sector Developments and Opportunities



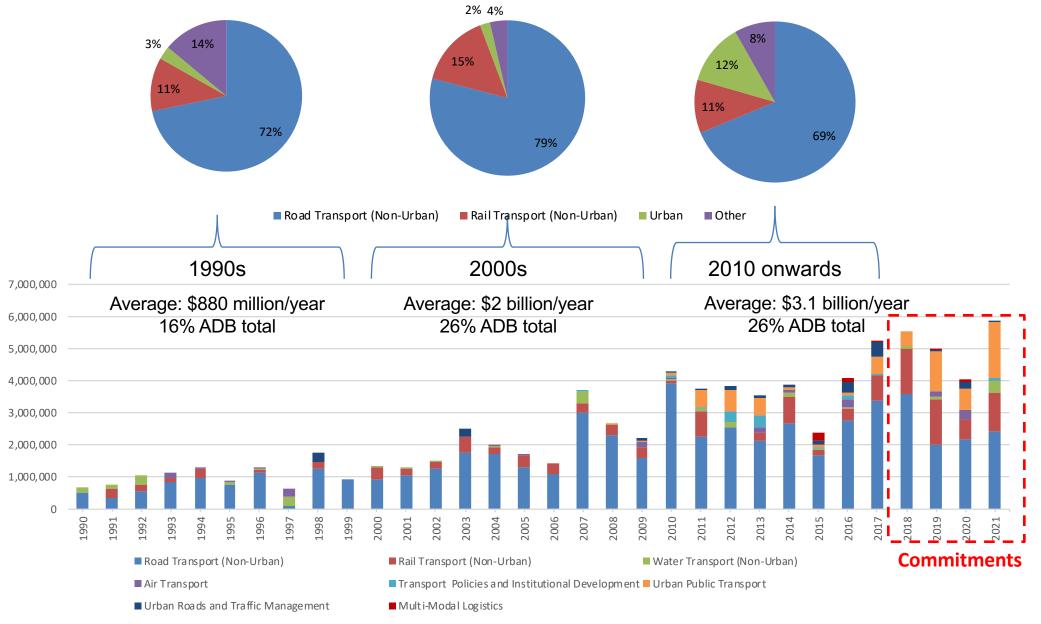


Trends in Transport

Asian countries need sustainable transport systems – trains, buses, ferries, bike paths – that move people in a low-carbon, safe, accessible, and affordable way.



Historical & Forward Distribution - Transport



Transport Investments by Subsector 1990-2021 (loans and grants)



Expected Trends & Opportunities - Transport

Tech	TSG approach
Design and construction	Value engineering (tunnels, bridges, metro, rail – international best practices and standards – introduction of new infrastructure to some DMCs) Lifecycle cost (asset management and budget allocation) Quality infrastructure (regional standards for better integration and higher standards)
Road and rail asset management and system operations	Drones (traffic management, geometry and surveys, project design, monitoring and asset management) Smartphones (apps for network assessment, user interface – RoadRoid, WAZE) Financing modalities (support for suitable KPIs – road condition, safety)
Intelligent Transport Systems (ITS)	Conventional ITS (traffic signals, system area control) Advanced ITS/5G (vehicle to infrastructure or vehicle to vehicle communication) Payment systems (contactless payments, real-time road pricing/tolls) Passenger interface and information systems (citymapper app)
Big Data	Traffic control and system management (real-time use of large data) Operational control and system efficiencies Logistic services (Uber for freight)
e-Mobility and autonomous vehicles	Transport policy for fleet renewal and uptake of technology (e-vehicles) Infrastructure requirements - charging stations, street furniture.





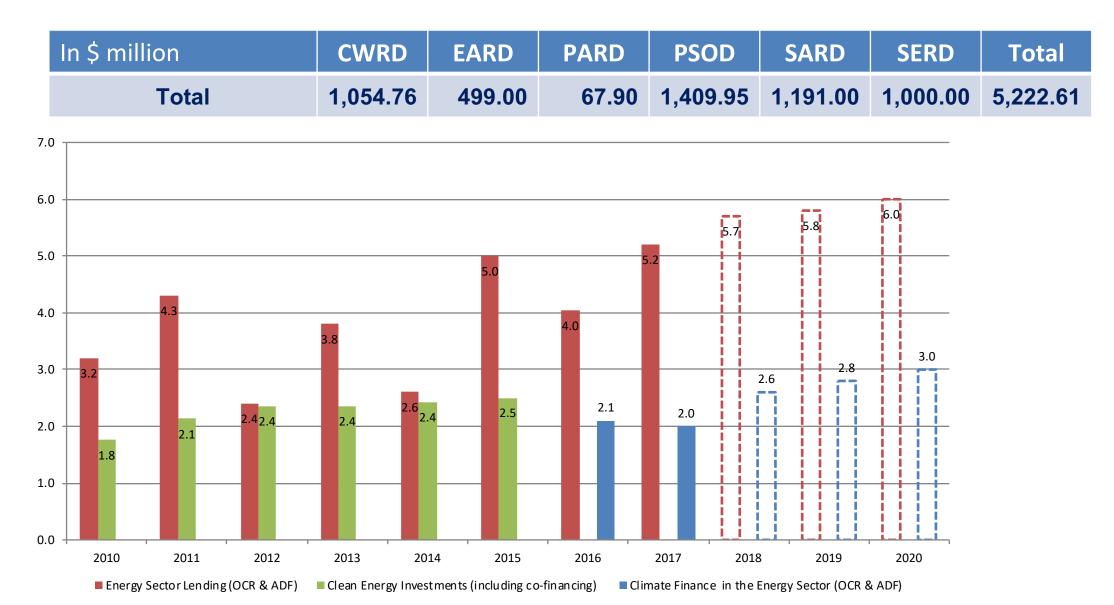
Trends in Energy

Energy demand is projected to almost double in the Asia and Pacific region by 2030. There is an urgent need for innovative ways to generate power in a socially, economically, and environmentally sustainable manner.



Historical & Forward Distribution - Energy

Total approvals in the Energy Sector in 2017 amounted to \$5.22 billion including
 \$1.41 billion from PSOD (27% of total energy sector lending)





Expected Trends & Opportunities - Energy

Energy generation

Distributed renewable energy (rooftop solar, mini-grids)

Transmission and distribution

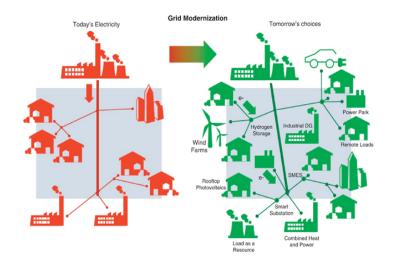
Smart grids systems with energy storage for renewable energy integration and frequency regulation

End use efficiency and demand-side response

Digital technologies to enhance energy efficiency in industry, buildings

Deployment of advanced technologies

Waste-to-energy projects Smart and mini-grid systems including energy storage Floating solar power systems Carbon capture and storage





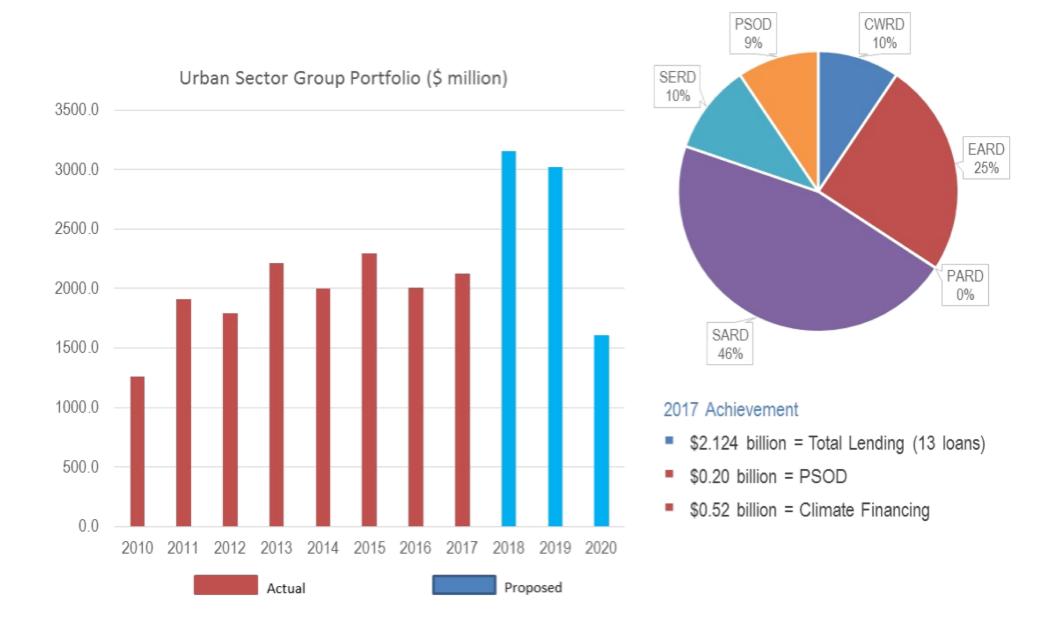


Trends in Urban Development

Cities generate over 80% of gross domestic product (GDP) in many countries of the Asia and the Pacific and are engines of economic growth that have lifted millions from poverty. But as they swell in size and number they are under increasing strain.



Historical & Forward Distribution - Urban





Expected Trends & Opportunities - Urban



Cross- Sectoral and Thematic Collaboration

Social development, informal settlements, health and housing



Urban Mobility

Mass rapid systems, walkability, air quality control and climate change mitigation



Urban Information Systems

Urban land use planning, data analytics, mobile technology and earth observation



Water Supply and Sanitation

Water distribution improvement, fecal sludge management and solid waste management



Ecosystem-based adaptation & Green Technology

Climate change adaptation, disaster risk management, flood management, drainage and bioengineering



Smart Cities

ICT, E-governance, greenfield development, digital and municipal finance





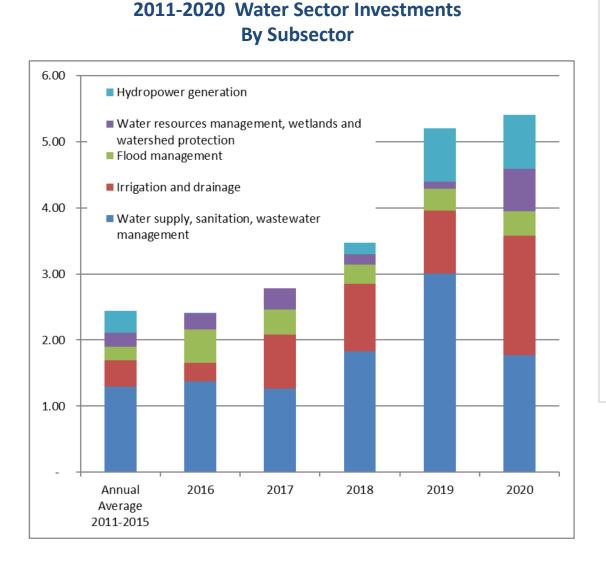
Trends in Water

Water is one of our most precious resources, but it is threatened by growth, misuse, and pollution. In Asia and the Pacific, many countries are in a water crisis and the demand for water is huge and growing.



Historical & Forward Distribution – Water

(Water Sector, \$2.78 billion approved investments in 2017)





Notes on the graph:

- Amounts are in US\$ billion
- For PARD, no loan approvals but \$2M grant approved in 2017



Expected Trends and Opportunities - Water

Information technology, cloud computing, and internet of things

- Tools: Satellites, Drones, LiDAR, SCADA, BlockChain, mobile phones
- Applications: Monitoring, Mapping, Planning, Productivity, Regulation, Decision Support (Prioritizing, Optimising, recasting)

Processes

 Water treatment for supply (desalination); wastewater treatment for water reuse and energy and nutrient recovery (circular economy)

More efficient water use

 new irrigation techniques for more crop per drop and climate change, non-revenue water reduction, intelligent control, managed groundwater recharge

Working with nature/ecology-based management

- coastal defence (mangroves, sediment trapping), flood detention (room for the river), water storage (upper watershed management and urban/peri urban – sponge cities)
- water quality improvement (helophyte filters), low impact design (LID)/sustainable urban development (SUDS)





Trends in Rural Development & Food Security

ADB's efforts and strategy to achieve food security in the region emphasizes on the integration of agricultural productivity, market connectivity, and resilience against shocks and climate change impacts as the three pillars to achieve sustainable food security.



Expected Trends & Opportunities -Rural Development & Food Security



- Improve farm productivity and efficiency—knowledge work and adoption of latest technologies
- Strengthen policy dialogues & partnerships—formulate institutional and policy reforms that incentivize private investments in agriculture
- Strengthen operations in:
 - Agriculture value chains—build market infrastructure and market connectivity; improve supply chain efficiency
 - Use of high-level technologies satellite & drone applications, ICT for efficient resource management
 - Climate-smart agriculture—build climate-resilience and promote efficient use of water and energy
- Formulate and implement food safety policies & standards build quality control laboratories, use ICT in food traceability and tracking



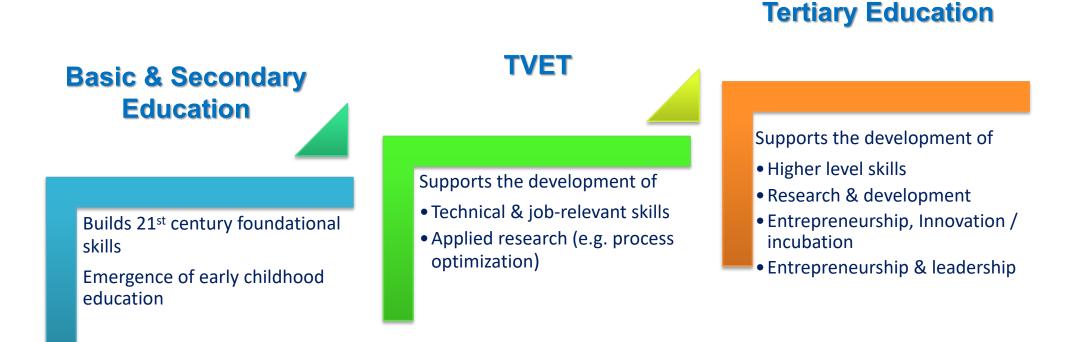
Trends in Education

Most developing countries in Asia and the Pacific have earned high marks for a dramatic rise in primary education enrollment rates in the last three decades, but daunting challenges remain, threatening economic and social growth.

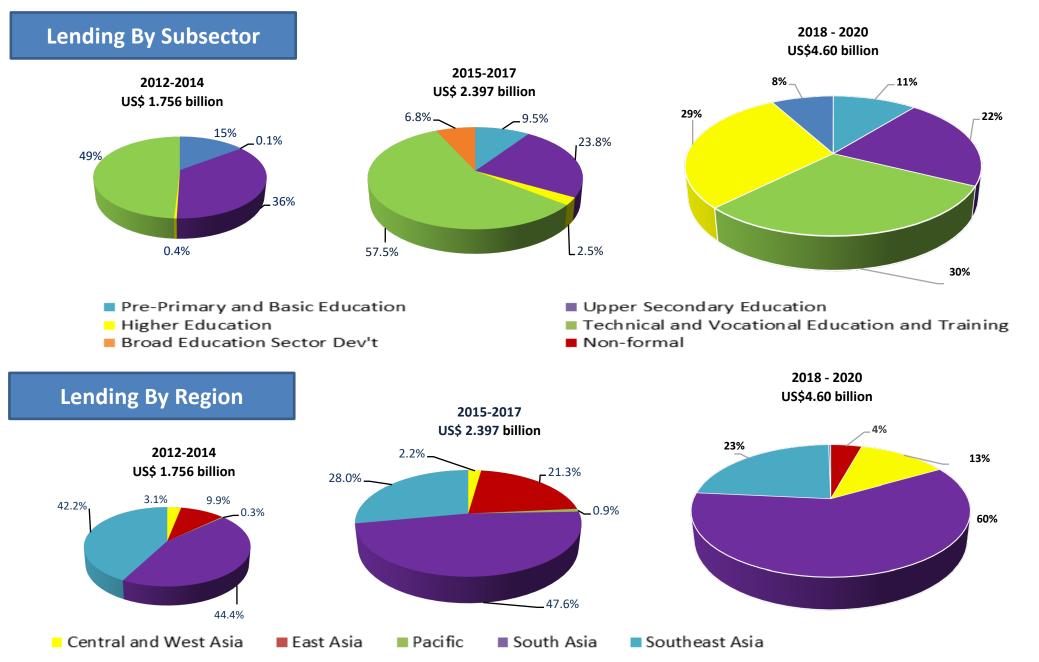


Education Sector Vision

Good jobs, decent income, increased productivity, better competitiveness, and knowledge based economy



Historical & Forward Distribution – Education





Trends in Health

Health is a human right and is essential to development. Good health improves learning capacity, worker productivity, and income. ADB is committed to improving health in Asia and the Pacific by supporting better governance and spending, infrastructure development, and regional collaboration to control communicable diseases.



Expected Trends & Opportunities- Health



Increase health lending from <2 to 3-5% (\$700M-1B) by 2020

East Asia

PRC- Elderly Care (\$150M) **Mongolia**- Air Quality Improvement (\$10M) Health services for Disadvantaged groups (\$130M)

Southeast Asia

Lao PDR- Health Governance (\$30M) <u>Viet Nam</u>- Local Health System (\$100M), Medical Universities (\$80M) Philippines- Social Protection (\$175M)

Pacific

PNG-Health Sector Reform (\$345M)

Tonga- Digital health project (\$7.5M)

Vanuatu. Tonga, Samoa, Tuvalu-System strengthening for new vaccines (\$25M)

Focus on 9–12 ADB DMCs

Strengthen health systems for Universal Health Coverage

Central West Asia

Uzbekistan-Primary Healthcare (\$45M) Armenia- Health Sector Reform (\$30M) <u>Tajikistan</u>- Integrated Maternal and Child Health (\$32M)

South Asia

India- Urban Health (\$300M) Bangladesh- Urban Primary Health Care (\$50M + \$110M) <u>Bhutan</u>- Health Sector Enhancement (\$20M) <u>Sri Lanka</u>- Health System Enhancement (\$50M)

