



U.S. Trade Advocacy Center
Asian Development Bank Liaison Office

MARKET BRIEF: THAILAND

(Based on ADB's *Country Partnership Strategy* for 2007-2011)

JANUARY 2008

Prepared By:

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I. Introduction to the Asian Development Bank (ADB)

Asia's premier nonprofit, multilateral financial institution, the Asian Development Bank (ADB), is headquartered in Manila, Philippines. ADB was founded in 1966 and is owned by 67 member countries, including 38 emerging markets in Asia. The United States and Japan are the largest co-equal shareholders. The Bank's membership extends from south, southeast, and south Asia to the Pacific Islands and includes seven (7) countries in Central Asia.

The ADB maintains resident offices in Afghanistan, Azerbaijan, Bangladesh, Cambodia, Mainland China, India, Indonesia, Kazakhstan, Kyrgyz Republic, Laos, Mongolia, Nepal, Pakistan, Sri Lanka, Thailand, Uzbekistan, and Vietnam; three (3) regional missions in the South Pacific; a Philippine country office; and representative offices in Frankfurt, Tokyo, and Washington, D.C.

ADB Lending and Technical Assistance

ADB's 2007 loan approvals reached US\$ 10.22 billion. In addition, the ADB provided US\$ 801 million in credit enhancements; US\$ 79 million in equity investments; US\$ 673 million in grants; US\$ 243 million in technical assistance, and US\$ 4 billion in multi-tranche financing to its member countries.

Pakistan was the largest borrower in 2007 with \$2 billion in approved loans. Viet Nam was second with \$1.48 billion; India third with \$1.38 billion; China a close fourth with \$1.30; and Indonesia is fifth with \$1.0 billion.

The transport and communications sector received the largest share at US\$ 3.9 billion (39%), followed by multisector with \$ 1.7 billion (16%). Energy received US\$ 1.4 billion (14%), law, economic management and public policy received US\$ 1.2 billion (12%), while finance received US\$ 50 million (1%).

ADB-financed social, physical and financial infrastructure projects in the public sector create commercial opportunities in many areas, such as: **agriculture and natural resources** (including disaster management); **education and training** (including distance learning); **energy** (including power generation and renewable energy); **environment** (including water supply, waste treatment and air pollution control); **financial services** (including banking and insurance reform, small business finance, micro-finance and capital markets development); **healthcare** (including telemedicine); **infrastructure** (including housing and urban redevelopment); and **transportation** (including rail, road and port projects). Every ADB-supported project reduces poverty as it fosters sustainable economic growth, social development and good governance.

ADB Private Sector Operations

Aside from its public sector operations, ADB has also been lending directly to the private sector since 1983. The bank's participation serves to mobilize further investments for projects that have a high developmental impact as well as technical, socioeconomic, financial and environmental viability. ADB's private sector operations reached to over US\$ 1.8 billion in 2007.

U.S. Success at ADB

ADB's loans and grants generate substantial, hard-currency commercial opportunities in borrowing Asian developing countries for consultants, suppliers, prime contractors, subcontractors, banks and project sponsors from the bank's member countries. About eighty per cent (80%) of ADB loans are used for the procurement of goods, equipment, and services. Since the start of ADB operations in 1967, the U.S. has won over \$6 billion in procurement contract awards, putting the U.S. fifth in overall

procurement among the bank's members. This translates to a 1.46 procurement/contribution ratio. U.S. consulting firms do particularly well, garnering over US\$ 900 million in consulting contract awards cumulatively, placing the U.S. in first place in this category among all members, outperforming its closest competitors from the U.K., Canada, and Australia.

U.S. Trade Advocacy Center
Asian Development Bank Liaison Office

The U.S. Department of Commerce maintains a congressionally mandated liaison office to the ADB (AC ADB). The Office's mission is to help American firms access, enter and expand in Asian emerging markets that benefit from ADB assistance. The Office provides market research (project leads and status information), counseling, advocacy and outreach/ training programs in the Asia Pacific region as well as in the continental U.S. AC ADB helps U.S. firms take advantage of ADB-related commercial, financial and infrastructure project development opportunities in countries borrowing from the ADB. The Office conducts seminars in the region and in the U.S. in cooperation with ADB, American State governments and the U.S. Commercial Service offices worldwide.

To perform its mandate, AC ADB cooperates with the Office of the U.S. Executive Director of the ADB, with the U.S. Commercial Service and U.S. Department of State posts throughout the Asia Pacific region. An American Senior Commercial Officer, Kenneth B. Reidbord, directs the office. AC ADB invites American firms to work with it in pursuing ADB commercial, financial services and infrastructure project development opportunities.

The Office's contact information is:

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II. ADB Market Brief: THAILAND

A. Introduction

This summary report includes **\$ 4.37 million** worth of public sector infrastructure projects in Thailand for which Asian Development Bank technical and/or financial assistance has been planned or approved. Opportunities for U.S. firms in such ADB-assisted projects in Thailand currently exist in these sectors: energy, environment; industry, finance and others; transport and communication; and urban development.

Planned TA programs totaling **\$ 1.53 million** are those identified by the ADB and Thailand as eligible for ADB-funded technical assistance or ADB loans as part of the ADB's Country Partnership Strategy (CPS) for 2007-2011 in Thailand.

Approved TA programs totaling **\$ 2.84 million** include ADB grants to Thailand to fund public tenders for technical assistance contracts, as well as ADB loans to Thailand fund public tenders for physical and social infrastructure development or technical assistance.

The Country Partnership Strategy (CPS) used by ADB allows U.S. firms to take a strategic approach to business opportunities supported by the ADB. The ADB's three-year advance programming gives U.S. firms early notification of projects under consideration by the ADB so that U.S. firms may begin to research the opportunities, develop relationships with key contacts, and prioritize opportunities to better position themselves for success. Interested U.S. firms may obtain additional information about ADB's planned lending and grant-supported projects by accessing the CPS through this link: <http://www.adb.org/Documents/CPSs/THA/2007/CPS-THA-2007-2011.pdf>. If you have any questions regarding this report or its specifics, you may contact Mr. Kenneth B. Reidbord at telephone numbers (63-2) 887-1345 to 46, or by e-mail at manila.adb.office.box@mail.doc.gov.

The U.S. Trade Advocacy Center, Asian Development Bank Liaison Office (AC ADB) stands ready to assist you. AC ADB offers a combination of market research, key introductions, counseling, promotional events and advocacy to help U.S. firms enter, access and expand in public and private sector markets in Thailand and thirty-seven other Asian emerging markets in which the ADB operates.

Overview of ADB Activities in Thailand

\$ 1.53 million	ADB TA Programs Planned for 2008
\$ 2.84 million	ADB TA Programs Approved in 2005 - 2007 (Ongoing)
\$ 4.37 million	TOTAL ADB Direct Public Sector Market Stimulus in THAILAND

B. SUMMARY TABLES

1. Sector Ranking of Planned TA Programs for Thailand, 2008				
SECTOR	Total Planned Loan Projects (\$ million)	Total Planned TA Programs (\$ million)	TOTAL (\$ million)	Percentage
Transportation and Communications	-	\$0.52	\$0.52	33.77%
Industry, Finance, and Others	-	0.30	0.30	19.67%
Urban Development	-	0.30	0.30	19.67%
Environment	-	0.26	0.26	17.05%
Energy	-	0.15	0.15	9.84%
Total PLANNED ADB Projects for Thailand	-	\$1.53	\$1.53	100.00%

2. Sector Ranking of Approved TA Programs for Thailand, 2002 - 2007				
SECTOR	Total Approved Loan Projects (\$ million)	Total Approved TA Programs (\$ million)	TOTAL (\$ million)	Percentage
Industry, Finance, and Others	-	\$1.92	\$1.92	67.49%
Transportation and Communications	-	0.45	0.45	24.60%
Environment	-	0.23	0.23	7.91%
Total APPROVED ADB Projects for Thailand	-	\$4.90	\$4.90	100.00%

III. Sectoral Breakdown: PLANNED & APPROVED Projects for THAILAND

A. ENERGY

PLANNED PROJECTS

PLANNED TECHNICAL ASSISTANCE PROGRAMS				
YEAR	PROJECT NAME	PROJECT DIVISION	TA TYPE	AMOUNT (\$ million)
2008	Capacity Development Support for Energy Efficiency Initiatives	TRM	ADTA	\$0.15
Subtotal				\$0.15

Total PLANNED TA Program in the ENERGY Sector	\$ 0.15 million
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B. ENVIRONMENT

1. PLANNED PROJECTS

PLANNED TECHNICAL ASSISTANCE PROGRAMS				
YEAR	PROJECT NAME	PROJECT DIVISION	TA TYPE	AMOUNT (\$ million)
2008	Capacity Building for Pollution Taxation and Resource Mobilization for Environment and Natural Resources Sectors - Phase II	TRM	ADTA	\$0.20
	Environmental and Social Safeguard Policy Review	TRM	SC	0.01
	Integrated Water Resource Management Pilot Demonstration Activity	SEAE	ADTA	0.05
Subtotal				\$0.26

Total PLANNED TA Programs in the ENVIRONMENT Sector	\$ 0.26 million
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2. APPROVED PROJECTS

APPROVED TECHNICAL ASSISTANCE PROGRAMS					
PROJECT NAME	TYPE	TA NO.	AMOUNT (\$ million)	DATE APPROVED	CLOSING DATE
Capacity Building for Pollution Taxation and Resource Mobilization for Environment and Natural Resources Sectors	ADTA	4667	\$0.23	10/03/05	12/31/07
Subtotal			\$0.23		

Total APPROVED TA Program in the ENVIRONMENT Sectors	\$ 0.23 million
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C. INDUSTRY, FINANCE, & OTHER SECTORS

1. PLANNED PROJECTS

PLANNED TECHNICAL ASSISTANCE PROGRAMS				
YEAR	PROJECT NAME	PROJECT DIVISION	TA TYPE	AMOUNT (\$ million)
2008	Pension System Design - Phase II	SEGF	ADTA	\$0.30
Subtotal				\$0.30

Total PLANNED TA Program in the FINANCE, INDUSTRY, and OTHER Sectors	\$ 0.30 million
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2. APPROVED PROJECTS

APPROVED TECHNICAL ASSISTANCE PROGRAMS					
PROJECT NAME	TYPE	TA NO.	AMOUNT (\$ million)	DATE APPROVED	CLOSING DATE
Commercial Financing for Local Government Units	ADTA	4558	\$0.67	01/12/05	02/28/08
Capacity Building for the Neighboring Countries Economic Development Cooperation Agency	ADTA	4886	0.20	12/07/06	12/31/07
Supporting the Implementation of the Capital Market Development Master Plan	ADTA	4826	0.75	08/16/06	12/31/07
Planning for the Sustainable Development of Southern Thailand	ADTA	7050	0.30	12/20/07	08/31/08
Subtotal			\$1.92		

Total APPROVED TA Programs in the FINANCE, INDUSTRY, and OTHER Sectors	\$ 1.92 million
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D. TRANSPORTATION AND COMMUNICATION SECTOR

1. PLANNED PROJECTS

PLANNED TECHNICAL ASSISTANCE PROGRAMS				
YEAR	PROJECT NAME	PROJECT DIVISION	TA TYPE	AMOUNT (\$ million)
2008	Leveraging Thailand's Investments in Urban Mass Transit Systems to Strengthen Industrial Development	TRM	SC	\$0.03
	Infrastructure Investment Advisory Assistance - Phase III	TRM	PPTA	0.49
Subtotal				0.52

Total PLANNED TA Programs in the TRANSPORTATION AND COMMUNICATION Sector	\$ 0.52 million
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2. APPROVED PROJECTS

APPROVED TECHNICAL ASSISTANCE PROGRAMS					
PROJECT NAME	TYPE	TA NO.	AMOUNT	DATE APPROVED	CLOSING DATE
Preparing the Bangkok Mass Rapid Transit Integrated Ticketing Project	PPTA	7044	\$0.70	12/17/07	12/31/08
Subtotal			\$0.70		

Total APPROVED TA Program in the TRANSPORTATION AND COMMUNICATION Sector	\$ 0.70 million
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E. URBAN DEVELOPMENT SECTOR

PLANNED PROJECTS

PLANNED TECHNICAL ASSISTANCE PROGRAMS				
YEAR	PROJECT NAME	PROJECT DIVISION	TA TYPE	AMOUNT (\$ million)
2008	Support for Urban Development Planning and Investment	TRM	ADTA	\$0.30
Subtotal				\$0.30

Total PLANNED TA Program in the URBAN DEVELOPMENT Sector	\$ 0.30 million
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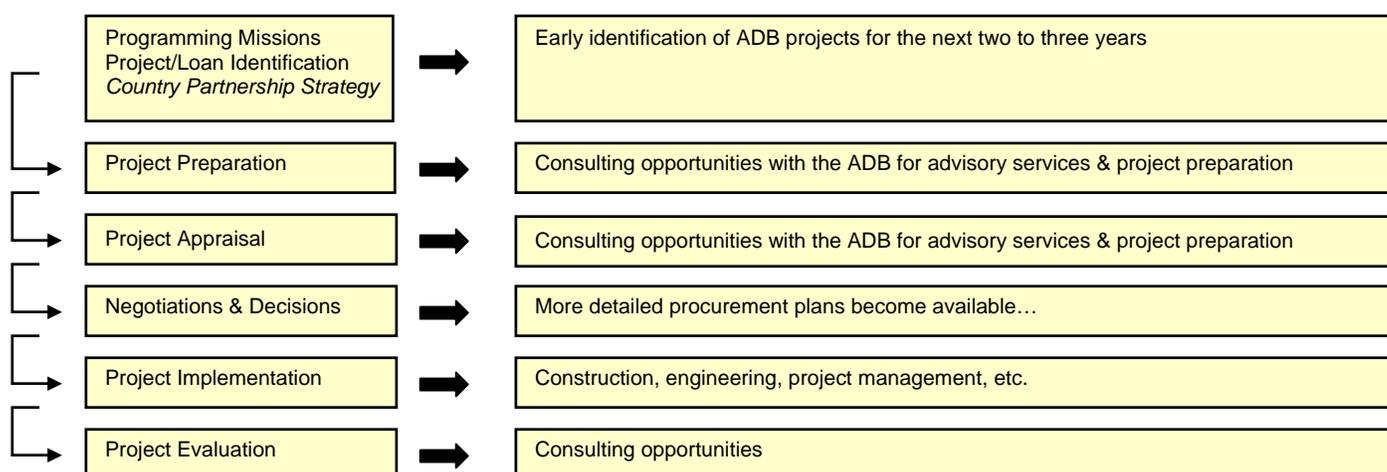
IV. The ADB Project Cycle: Business Opportunities open for US Companies

For US companies interested in pursuing ADB business opportunities, the ADB *Country Partnership Strategy* provides a medium term projection of projects to be undertaken, but not yet active. It is available on the ADB website for each developing member country (DMC) and is an important document to identify projects and consulting opportunities very early in the project cycle. However, an understanding of the whole project cycle is still key to success. The US Commercial Service Liaison Office to the ADB, and our worldwide network of US Commercial Service posts, are ready to assist US firms throughout the whole process.

To be successful, US firms must continuously research opportunities, build key ADB and government contacts and carefully match their capabilities and products with the bank's requirements. It is important to understand that procurement and consultant recruitment decisions rest with the ADB project officers for technical assistance grant projects, and with the developing countries' executing agencies for loan projects. The following chart summarizes opportunities for US firms during the ADB project cycle.

The ADB Project Cycle:

Opportunities for US Firms



US firms interested in pursuing ADB business opportunities should familiarize themselves with these essential Documents:

- **Country Partnership Strategy (CPS)**: Medium-term projection of ADB project pipeline.
- **Report and Recommendation of the President (RRP for loan projects)**: Detailed report on ADB loan project containing budgets and procurement plans.
- **Technical Assistance Report (for TA Projects)**: Consultants' reports that provide information and insights into project design/implementation.
- **Sector Policies**: ADB policies that have been established for each industry sector.

Abbreviations

AC ADB	U.S. Trade Advocacy Center, Liaison Office to the ADB
ADB	Asian Development Bank
ADTA	Advisory and Operational Technical Assistance
CCG	Country Commercial Guide
CMA	Customized Market Access
DMC	Developing Member Country (of ADB)
EBRD	European bank for Reconstruction and Development
ECAs	Export Credit Agencies
E-ICP	Enhanced International Company Profile
Ex-Im	Export-Import Bank
FMR	Flexible Market Research
GKS	Gold Key Service
IBP	International Buyer Program
IMI	International Marketing Insight
IPS	International Partner Search
ISA	Industry Sector Analysis Report
IVP	International Visitors Program
NGOs	Non-government Organizations
ODA	Overseas Development Assistance
OPIC	Overseas Private Investment Corporation
PCR	Project Completion Report
PPAR	Project Performance Audit Report
PPTA	Project Preparatory Technical Assistance
PKS	Platinum Key Service
RETA	Regional Technical Assistance
RRP	Report and Recommendation of the President of ADB
SEAE	Southeast Asia Department Agriculture, Environment, and Natural Resources Division
SEGF	Southeast Asia Department Governance, Finance, and Trade Division
TA	Technical Assistance
TF	Trade Fair
TM	Trade Mission
TOP	Trade Opportunity Program Report
TRM	Thailand Resident Mission
US-AEP	U.S.-Asia Environmental Partnership
USAID	United States Agency for International Development
USCS	U.S. Commercial Service
USTDA	U.S. Trade Development Agency
VRM	Vietnam Resident Mission
WB	World Bank



**U.S. TRADE ADVOCACY CENTER
ASIAN DEVELOPMENT BANK LIAISON OFFICE
Manila, Philippines**

Assistance Available to U.S. Firms:

If you are a U.S. firm, the U.S. Commercial Service Liaison Office to the Asian Development Bank is ready to respond to your requests for:

- ***Detailed project information***

Detailed project information about ADB public sector infrastructure projects, including contact information to the ADB project officer; a description of the project; the scope of work; the point of contact at the project executing agency; where to obtain the ADB-engaged consultant's project feasibility study; the status of the processing by ADB of the project; indicative procurement packages and budgets for project (but not sector or program) loans; firms awarded consulting or supply contracts; or other commercially relevant information.

- ***Copies of project preparatory documents***

Copies of project preparatory documents for ADB public sector infrastructure projects, such as ADB technical assistance proposals; and ADB loan proposals.

- ***Leads about bidding opportunities***

Leads about bidding opportunities for consultants and suppliers, as contained in notices of public tenders issued by the project executing agency, notified to ADB, and which form part of the borrowing government's implementation of the ADB project.

- ***Leads about consulting subcontracting opportunities***

Leads about sub-contracting opportunities under ADB-funded technical assistance projects, with shortlisted U.S. or other ADB-member country consultants during proposal preparation stage.

- ***Assistance in positioning your product***

Assistance in positioning your innovative product, service, or technology with ADB and Asian national decision-makers.

- ***Assistance in financing your private sector project***

Assistance in determining the interest of the ADB's Private Sector Finance Department in the financing of the proposed private sector project, as well as assistance in meeting potential Asian business partners (through the ADB and US Commercial Services Offices worldwide), potential investors, bankers, insurers, professional business advisors and others who may be important to the success of your private sector project. Assistance in determining the financial support available for your project from the U.S. Government, for example, the U.S. Trade & Development Agency (TDA), the Export-Import Bank of the United States (Ex-Im) and the Overseas Private Investment Corporation (OPIC).

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ADB Market Briefs (Free of Charge)

By Country

- Afghanistan
- Bangladesh
- Cambodia
- Central Asian Republics
- China, People's Republic of
- Greater Mekong Sub-region
- India
- Indonesia
- Laos

- Mongolia
- Nepal
- Pacific Islands
- Pakistan
- Philippines
- Sri Lanka
- Thailand
- Timor Leste
- Vietnam

By Sector

- Agriculture and Natural Resources Sector
- Education Sector
- Energy Sector
- Environment Sector

- Health Sector
- Industry, Finance, and Other Sectors
- Transportation and Communication Sector
- Urban Development Sector

Other Materials (Free of Charge)

- Flyer on the U.S. Commercial Liaison Office for the Asian Development Bank (AC ADB)
- How to do Business with the ADB: A Primer for U.S. Businesses
- ADB Asia Pacific U.S. Government Contacts
- ADB Overall Organization Chart
- Article on "How to Win ADB Consulting Contracts"
- ADB's FAQ's on Consulting Services for Individual Consultants
- ADB's FAQ's on Consulting Services for Consulting Firms

- ADB Private Sector Finance: Catalyzing Private Investment in Asia
- USTDA Feasibility Study Model Format (U.S. Company)
- USTDA Feasibility Study Model Format (Foreign Entities)
- A Fact Sheet: United States and ADB
- Guidelines on the Use of Consultants by the Asian Development Bank and Its Borrowers
- ADB Procurement Guidelines

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