アジア諸国における都市間交通の開発－課題と挑戦－
Intercity Transport Development in Asian Countries: Issues and Challenges

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1. Background and objectives: Transport infrastructure is grossly inadequate for both urban and intercity services in rapidly developing Asian countries. The basic nature of transport problems and policy measures are different for urban transport and intercity transport. However, most research effort is focused only on the urban transport issues. The objective of this international collaborative research is to examine the cases in ten Asian countries (namely Japan, Korea, Taiwan, Malaysia, Thailand, Indonesia, China, India, Vietnam, and Nepal) in order to understand the long-term phenomena and make policy suggestions for the intercity transport development in Asian countries. In particular, policy measures will be explored to achieve efficient modal balance for passenger transport as past experience in developed countries shows that unbalanced mode share may incur significant economic and environmental costs.

2. Existing situation of intercity transport in Asian countries: Existing stock of road and rail infrastructure is not adequate to meet large scale emerging demand for intercity travel. There is also increasing trend of overconcentration in big cities apparently due to lack of intercity connectivity. The existing high share of bus and rail is changing as the higher income groups are now demanding for better services, which would obviously be offered by private cars (for shorter trips) and air (for longer trips), which is an undesirable situation from both economic and environmental view points. The trend of investment for intercity transport infrastructure is not much encouraging. With an exception of China, which has sustained a high transport investment of over 4 % of GDP in recent years, developing Asian countries have a low level of transport investment. For most countries it is just around 1 % of GDP or even less. Economic crisis and new priority areas for public spending are some of the reasons for lower transport investment. The experience of developed Asian economies such as Japan and Korea suggests that during high growth stage, transport investment should be maintained at around 2 to 4 % of GDP. By these measures, there is a wide investment gap to be filled up in developing Asian countries.

3. Selected issues and challenges: The dynamics of intercity transport suggests that railways investment can result in high density corridors offering wide range of agglomeration economies. On the other hands, road is more flexible in responding emerging demands but results in dispersion in the long-run. Likewise as income grows travel behavior also changes and so is the cost structure of different modes. Labor intensive modes such as bus and conventional rail would be in disadvantage. Regarding the investment for High Speed Rail (HSR) it is important to consider the scale of investment (as % of GDP) and also affordability of fare level. This implies for appropriate timing of investment. Likewise, it is important to select station location of HSR properly to get access and egress advantage against air mode. Another issue is to explore more for alternative sources of funding rather than just financing mechanisms. Several other issues, such as approach of upgrading of conventional railways, expressway development, pricing policy and affordability and so forth have also been identified in this research.

4. Policy suggestions (tentative): Given the large scale emerging demands, Asian countries needs to develop multimodal intercity transport system. What is important is to consider the long-term dynamics and decide on appropriate timing and sequencing while developing different modes in a coordinated way. In particular, railway should be emphasized not only for transport role but also for promoting efficient spatial development patterns (high density corridor, growth of secondary cities etc). Since the bus and conventional railway are labor intensive and are at disadvantage as income grows, High Speed Rail should be developed to effectively compete against both private mode and air. To fill up investment gap, alternative sources of funding that take the ultimate burden of paying-back the investment (such as users fees, special taxes, value capture etc) should be secured before exploring various financing schemes.