



# Session 1: Review and Update GMS Transport Sector Strategy 2030

## Part 2: Overview of GMS Transport Sector

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**GMS SUBREGIONAL TRANSPORT FORUM**

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## Overview of the GMS Transport Sector

Key developments in the GMS transport sector that need to be considered in updating TSS 2030.



## ***GMS countries have made substantial progress in improving physical connectivity.***

Achieved through efforts of GMS countries with ADB as a major provider of support to GMS transport projects. Independent evaluation of ADB's contribution to the GMS Program concluded:

**“ADB support for connectivity significantly enhanced road transport infrastructure... ADB supported the construction and/or rehabilitation of about 3,300 km of roads, helping to double the number of cross-border road passengers and the volume on roads during 2010–2018.”**

**“ADB support in the transport sector is likely to connect 19.2 million residents to the GMS Economic Corridor network along the project sites, reduce transport costs, including the costs of vehicle operations and road maintenance, and improve economic efficiency.”**

Source: ADB Independent Evaluation Department. 2021. *ADB Support for the Greater Mekong Subregion Program, 2012-2020: Performance and Results*. Manila



***However, the main focus of GMS transport infrastructure development has been on roads and less on other modes.***

GMS Passenger and Freight Volume on Road and Rail Transport

Indicator	2010	2018
<b>Road transport</b>		
• Passenger (passengers-km-million)	178,616	313,595
• Freight (tons-km-million)	209,459	361,629
<b>Rail transport</b>		
• Passenger (passengers-km-million)	44,208	77,413
• Freight (tons-km-million)	132,824	113,063 (2016)

Source: *GMS Statistical Data Base*

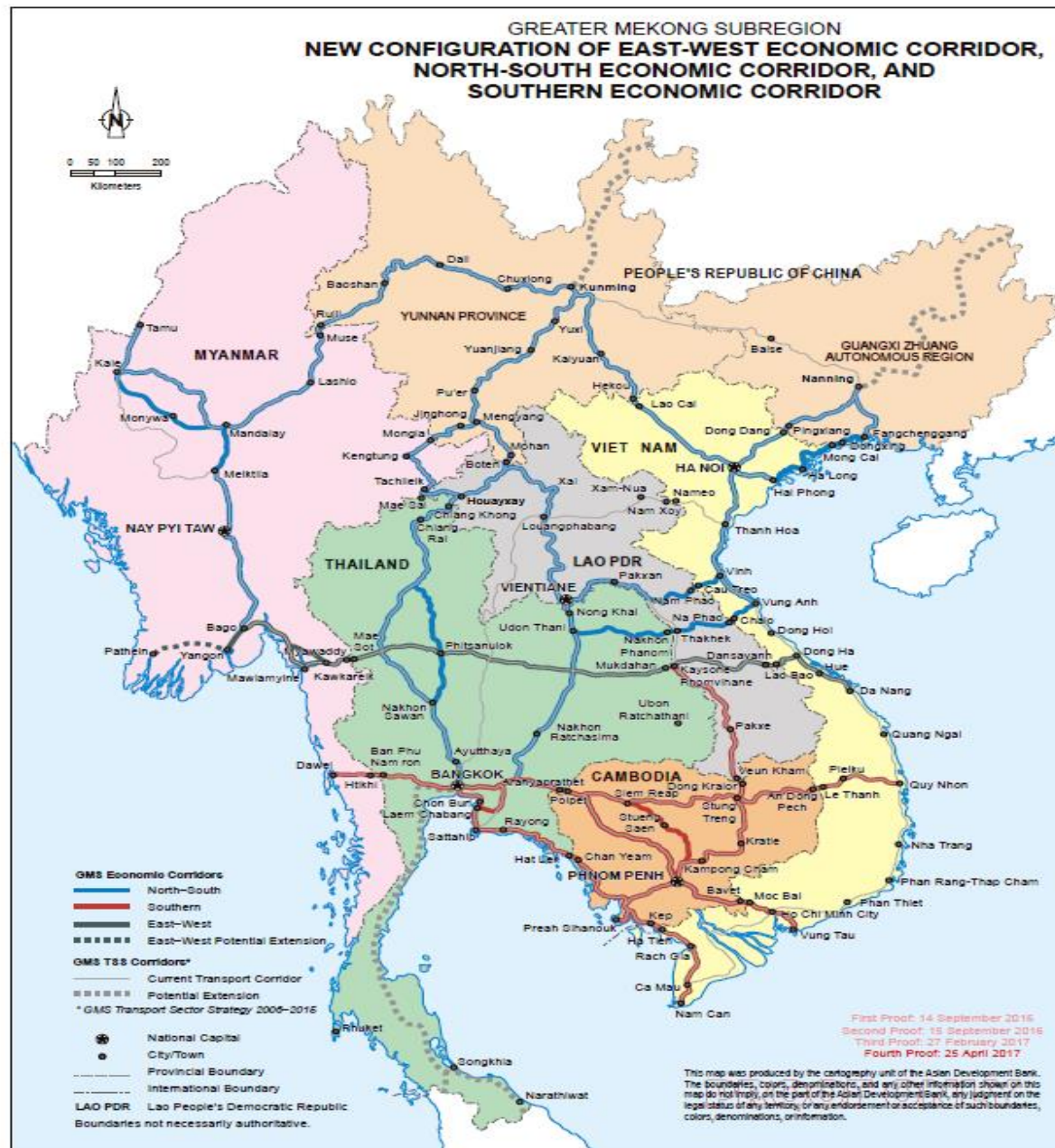
**The TSS 2030 Update has to place more emphasis on intermodal and multimodal transport development, especially railway and inland waterways.**





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***Cross-border trade and transport facilitation (TTF) is necessary to maximize improved physical connectivity.***

***Value of intra-GMS trade increased from \$203 billion in 2010 to \$552 billion in 2019, with one-half of 2019 value being accounted for by trade with PRC. There is significant potential for expanding and diversifying intra-GMS trade.***

**Accelerating and enhancing the effectiveness of CBTA implementation needs to be placed at the forefront of the strategy in the TSS 2030 Update.**



**Transport infrastructure and TTF have to be complemented by logistics development to effectively contribute to the GMS 2030 vision. The COVID-19 pandemic highlighted the importance of logistics and supply chain management.**

## Logistics Performance Index 2023

Country	Overall	Customs	Infrastructure	International Shipments	Logistics competence and quality	Timeliness	Tracking and tracing
CAM	2.4	2.2	2.1	2.3	2.4	2.7	2.8
PRC	3.7	3.3	4.0	3.6	3.8	3.7	3.8
LAO	2.4	2.3	2.3	2.3	2.4	2.8	2.4
MYA	2.30	2.17	1.99	2.20	2.28	2.20	2.91
THA	3.5	3.3	3.7	3.5	3.5	3.5	3.6
VIE	3.3	3.1	3.2	3.3	3.2	3.3	3.4

Note: The LPI score of Myanmar is for 2018. The top scorer in 2023 was Singapore with 4.3, while the lowest scorer was Libya with 1.9.

Source: World Bank Logistics Performance Index for selected years.

**The TSS 2030 Update needs to strengthen the approach to logistics development in the GMS. It should look into aspects of supply chain management that can be included in the strategy.**



**Climate change is a cross-cutting concern in TSS 2030. Efforts of GMS countries to reduce national emissions and adapt to climate change are embodied in nationally determined contributions (NDCs).**

## NDCs of GMS Countries in the Transport Sector (Page 1)

Country	Climate Change Mitigation			Climate Change Adaptation
	Unconditional Targets	Conditional Targets		
	Measures	Measures	Necessary financial support (\$ million)	Measures
CAM	<ul style="list-style-type: none"> <li>Establish green belts along major roads for climate change mitigation<sup>a</sup></li> </ul>	<ul style="list-style-type: none"> <li>Promote integrated public transport systems in main cities</li> </ul>	-	
	<ul style="list-style-type: none"> <li>Shift long distance freight movement from trucks to train<sup>a</sup></li> </ul>	<ul style="list-style-type: none"> <li>Enhance maintenance and inspection of vehicle</li> </ul>	0.0006 (\$600)	
		<ul style="list-style-type: none"> <li>E-mobility</li> </ul>	-	

<sup>a</sup>The Cambodia NDC does not show whether this is unconditional or conditional.





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## NDCs of GMS Countries in the Transport Sector (Page 2)

Country	Climate Change Mitigation			Climate Change Adaptation
	Unconditional Targets	Conditional Targets		
	Measures	Measures	Necessary financial support (\$ million)	Measures
<b>PRC</b>	<ul style="list-style-type: none"> <li>Improve green transportation system and standards</li> <li>Foster urban low-carbon transportation system</li> <li>Optimize the transportation structure</li> <li>Accelerate the replacement and optimization of transportation fuels</li> <li>Encourage new energy vehicle development</li> </ul>	-	-	<ul style="list-style-type: none"> <li>Urban greenways</li> <li>Strengthening of the maintenance of transportation facilities, and raising of design and construction standards</li> <li>Resilience of national highway network</li> </ul>



## NDCs of GMS Countries in the Transport Sector ( Page 3)

Country	Climate Change Mitigation			Climate Change Adaptation
	Unconditional Targets	Conditional Targets		
	Measures	Measures	Necessary financial support (\$ million)	Measures
LAO	<ul style="list-style-type: none"> <li>New bus rapid transit system in Vientiane capital and associated non-motorized transport component</li> <li>Lao-China railway</li> </ul>	<ul style="list-style-type: none"> <li>30% electric vehicles penetration for 2-wheelers and passengers' cars in national vehicle mix</li> </ul>	500	<ul style="list-style-type: none"> <li>Increase the resilience of urban development and infrastructure to climate change, including through the use of green infrastructure and nature-based solutions</li> <li>Promote ecosystem-based adaptation solutions</li> </ul>
		<ul style="list-style-type: none"> <li>Biofuel to meet 10% of transport fuels</li> </ul>	230	

Sources: [unfccc.int/sites/default/files/NDC/2022-06/20201231\\_NDC\\_Update\\_Cambodia.pdf](https://unfccc.int/sites/default/files/NDC/2022-06/20201231_NDC_Update_Cambodia.pdf); [附件 \(unfccc.int\) NDC 2020 of Lao PDR \(English\), 09 April 2021 \(1\).pdf \(unfccc.int\)](#); [Myanmar Updated NDC July 2021.pdf \(unfccc.int\)](#); [Thailand Updated NDC.pdf \(unfccc.int\)](#); [Viet Nam NDC 2022 Eng.pdf \(unfccc.int\)](#)



## NDCs of GMS Countries in the Transport Sector ( Page 3)

Country	Climate Change Mitigation			Climate Change Adaptation
	Unconditional Targets	Conditional Targets		
	Measures	Measures	Necessary financial support (\$ million)	Measures
MYA	<ul style="list-style-type: none"> <li>Electric vehicles</li> <li>Development of a Shipping Energy Efficiency Management Plan and a Green Shipping Strategy</li> </ul>	<ul style="list-style-type: none"> <li>Inland marine sector for GHG emission reduction</li> </ul>	1.2	
		<ul style="list-style-type: none"> <li>Green ship strategy for coastal shipping</li> </ul>	1.1	

Sources: [unfccc.int/sites/default/files/NDC/2022-06/20201231\\_NDC\\_Update\\_Cambodia.pdf](https://unfccc.int/sites/default/files/NDC/2022-06/20201231_NDC_Update_Cambodia.pdf); [附件 \(unfccc.int\) NDC 2020 of Lao PDR \(English\), 09 April 2021 \(1\).pdf \(unfccc.int\)](#); [Myanmar Updated NDC July 2021.pdf \(unfccc.int\)](#); [Thailand Updated NDC.pdf \(unfccc.int\)](#); [Viet Nam NDC 2022 Eng.pdf \(unfccc.int\)](#)



## NDCs of GMS Countries in the Transport Sector ( Page 4)

Country	Climate Change Mitigation			Climate Change Adaptation
	Unconditional Targets	Conditional Targets		Measures
	Measures	Measures	Necessary financial support (\$ million)	
<b>THA</b>	<ul style="list-style-type: none"> <li>Environmentally Sustainable Transport System Plan (2013-2030)</li> <li>NDC Roadmap identifies key measures and allocates emission reduction targets and responsibilities to relevant agencies in energy, transport, industry, and waste management sectors</li> </ul>	-	-	-

Sources: [unfccc.int/sites/default/files/NDC/2022-06/20201231\\_NDC\\_Update\\_Cambodia.pdf](https://unfccc.int/sites/default/files/NDC/2022-06/20201231_NDC_Update_Cambodia.pdf); [附件 \(unfccc.int\) NDC 2020 of Lao PDR \(English\), 09 April 2021 \(1\).pdf \(unfccc.int\)](#); [Myanmar Updated NDC July 2021.pdf \(unfccc.int\)](#); [Thailand Updated NDC.pdf \(unfccc.int\)](#); [Viet Nam NDC 2022 Eng.pdf \(unfccc.int\)](#)



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Country	Climate Change Mitigation			Climate Change Adaptation
	Unconditional Targets	Conditional Targets		
	Measures	Measures	Necessary financial support (\$ million)	Measures
<b>VIE</b>	<ul style="list-style-type: none"> <li>Reduction of emission from fuel combustion in energy industry, industrial production and construction, transportation and others.</li> </ul>	<ul style="list-style-type: none"> <li>For transport sector, improve energy efficiency and conversion in transportation, including passenger, freight, and private transportation</li> </ul>	46,097 <sup>b</sup>	<ul style="list-style-type: none"> <li>Updating transport facilities in areas with high disaster risk and vulnerability to climate change</li> <li>Developing and completing the expressway network and the inter-regional transport system</li> </ul>

<sup>b</sup> The figures are GHG reduction volume in energy industry, industrial production and construction, transportation, and others (household, agriculture, services and trade) in the country..

Sources: [unfccc.int/sites/default/files/NDC/2022-06/20201231\\_NDC\\_Update\\_Cambodia.pdf](https://unfccc.int/sites/default/files/NDC/2022-06/20201231_NDC_Update_Cambodia.pdf); [附件 \(unfccc.int\) NDC 2020 of Lao PDR \(English\), 09 April 2021 \(1\).pdf \(unfccc.int\)](#); [Myanmar Updated NDC July 2021.pdf \(unfccc.int\)](#); [Thailand Updated NDC.pdf \(unfccc.int\)](#); [Viet Nam NDC 2022 Eng.pdf \(unfccc.int\)](#)





*Climate change is a cross-cutting concern in TSS 2030. Efforts of GMS countries to reduce national emissions and adapt to climate change are embodied in nationally determined contributions (NDCs).*

**The TSS 2030 Update needs to incorporate the NDCs in the transport sector of the GMS countries in the strategy for GMS transport development.**



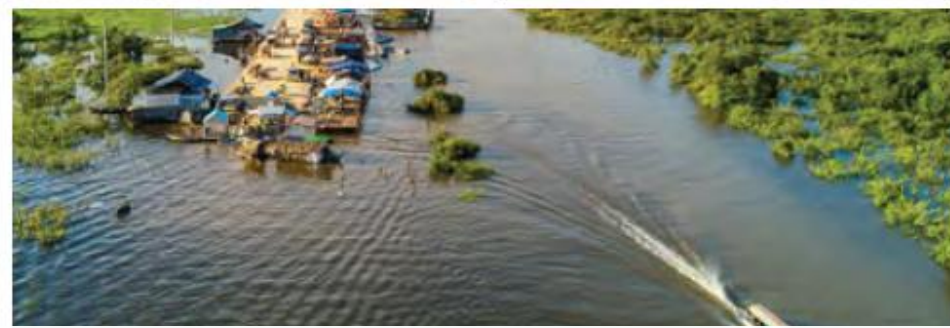
## ***RECAP and CONCLUSION***

### **KEY ASPECTS OF GMS TRANSPORT DEVELOPMENT REQUIRING MORE EMPHASIS AND ATTENTION IN THE TSS 2030 UPDATE:**

- **Intermodal and multimodal development**
- **Trade and transport facilitation (CBTA)**
- **Logistics development**
- **Climate change**

Increased participation of the private sector through closer public-private collaboration is a critical success factor in addressing these concerns.





**THANK YOU!**

