Asian Transport Observatory

POLICY LANDSCAPE OVERVIEW

Asia & Participating DMC Countries

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Asian Transport Observatory

Advancing Transport Leadership,
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ATO National Policy Tracker

Repository of transport related policy documents and legislations

- Categorized under 13 types
- Tagged by
  - transport subsector,
  - publishing year,
  - family of documents

Filterable records of Policy Measures and Targets committed by the country

- By Dimension - 'infrastructure/ RSA/ APH/ CLC (M & A)'
- By Mode - 'road/ rail/ aviation/ shipping'
- By Scope - 'national/ urban/rural'
- By Sector - 'freight/ passenger/ combined'
- By committed Target year
- By toolbox – family of measures
- By ASI framework

Analysis of Policy Measures and Targets committed by the country

- Based on Frameworks (Regulatory, Institutional, Technology,…)
- For assessing timeline of countries' priorities
- For tracking international/ regional processes
- Comparing NDC/ LTS vs. Others and assessing policy coherence
- For assessing the level of policy progress ambition
- For benchmarking countries
- (Combined with data) To understand policy gaps and opportunities
- Sub-regional analysis – trends/ progress/ priorities

Results of the policy tracker

- Develop the Investment pipeline for Countries and MDBs
- Knowledge transfer – cross learning
- International support priorities

Sectoral development

Set by the - Presidential statement/ National development policy etc.
- **Vision and Goal(s)**

(Sub) Sectoral Policy documents and External consultant/ MDB assistance reports
- **Policy Strategies**
- **Measurable Targets**
- **Action Plan elements**

Legislative and institutional framework
- **Transport and related laws/ Acts**

Notes: *RSA = Road Safety; APH = Air Pollution; CLC (M & A) = Climate Change (Mitigation and Adaptation); ASI = Avoid-Shift-Improve*

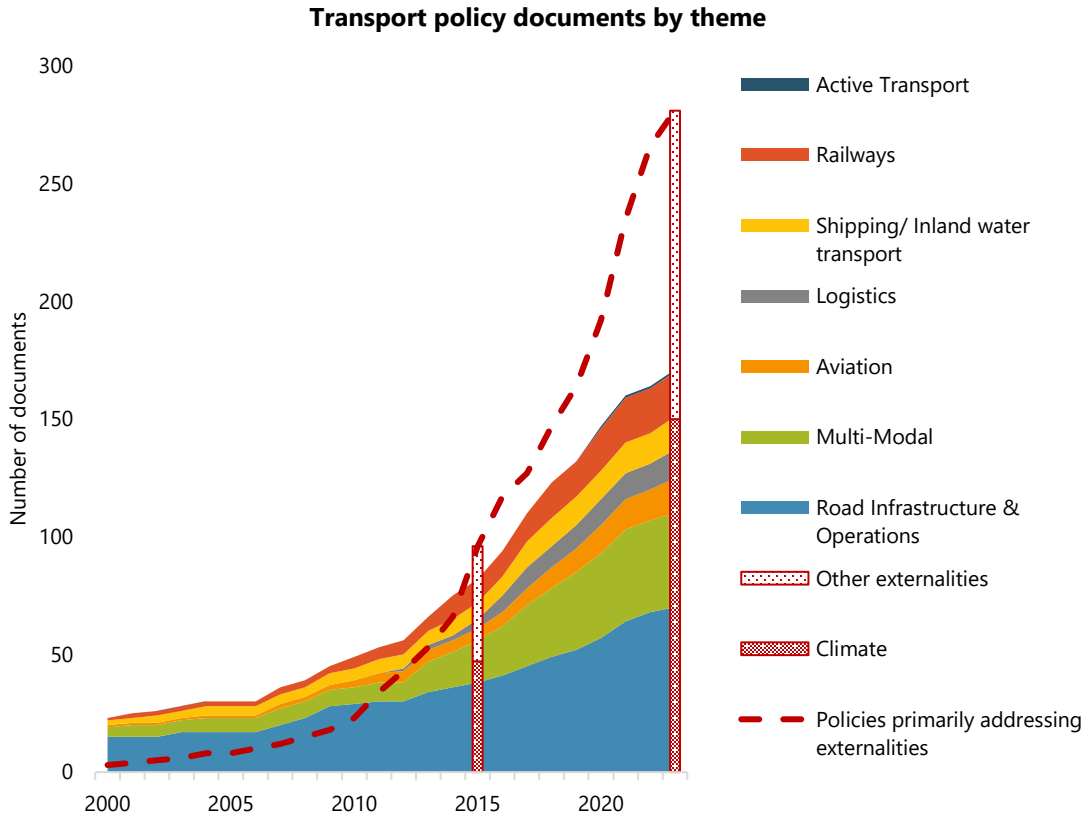
For a sample of 41 countries

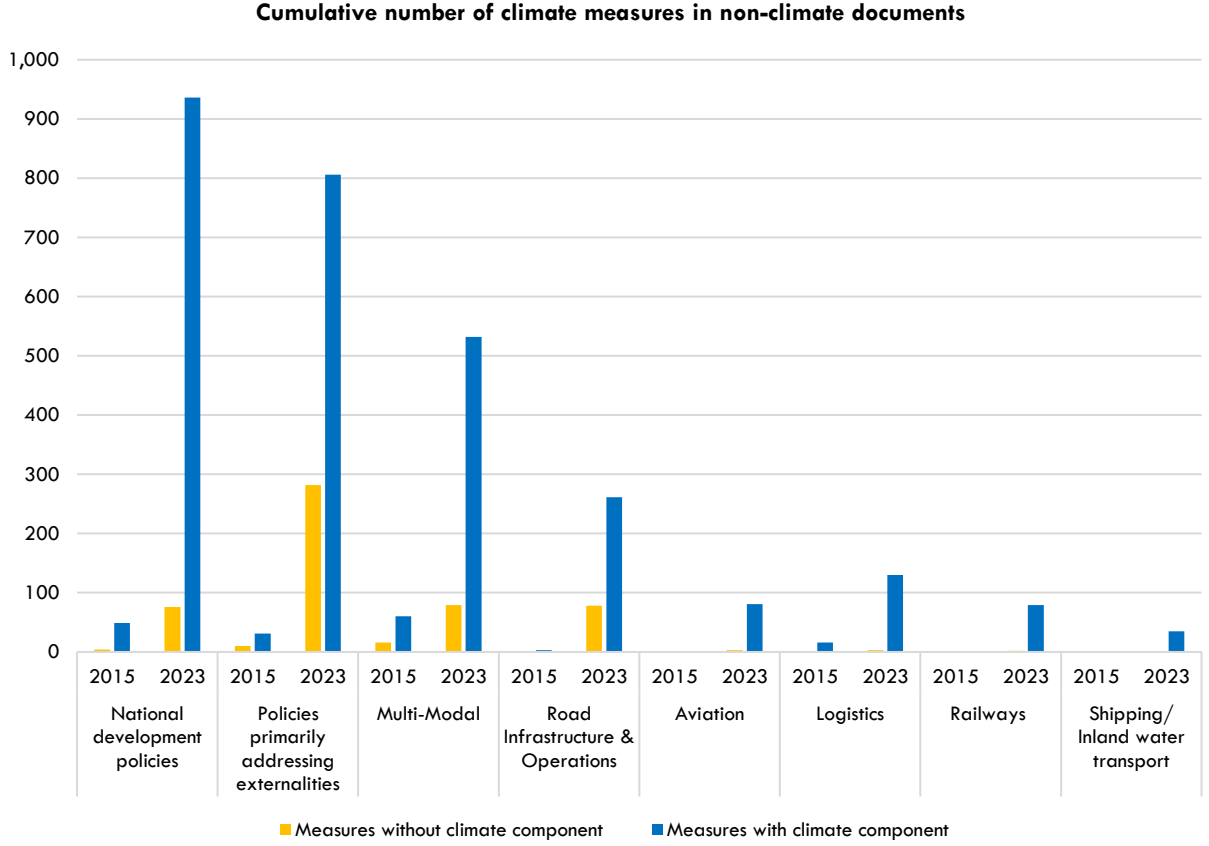
760+ policy documents
~ 19 documents per country
(May 2025)

9000+ policy measures
~ 220 policy measures per country
(May 2025)

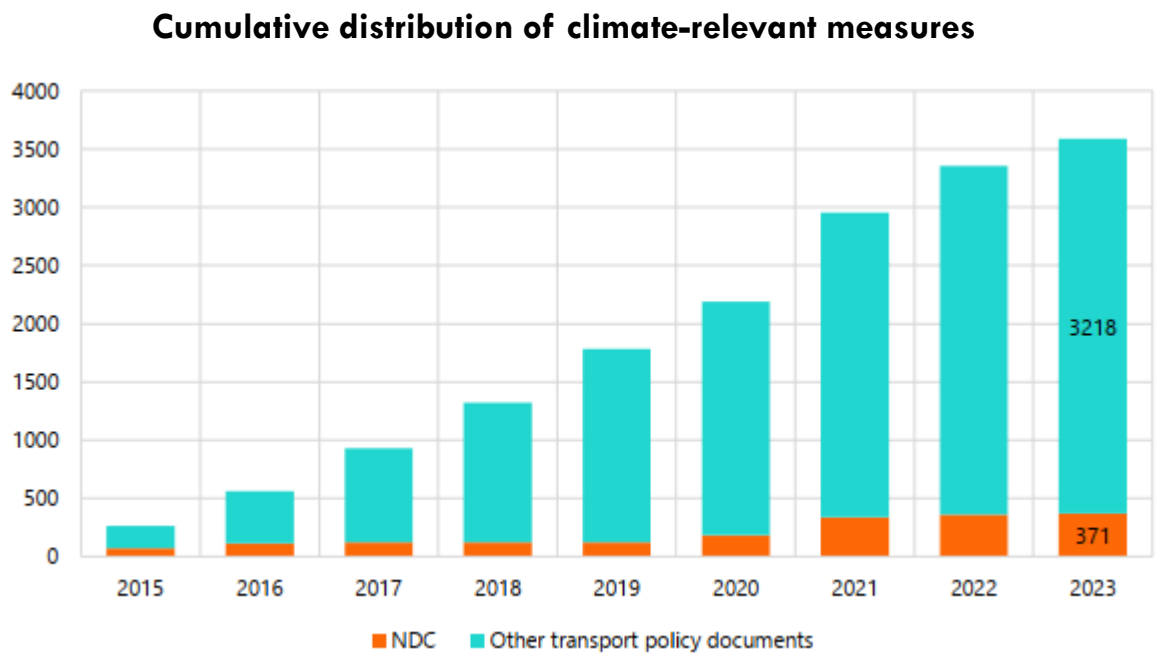
820+ targets
~ 20 targets per country
(May 2025)

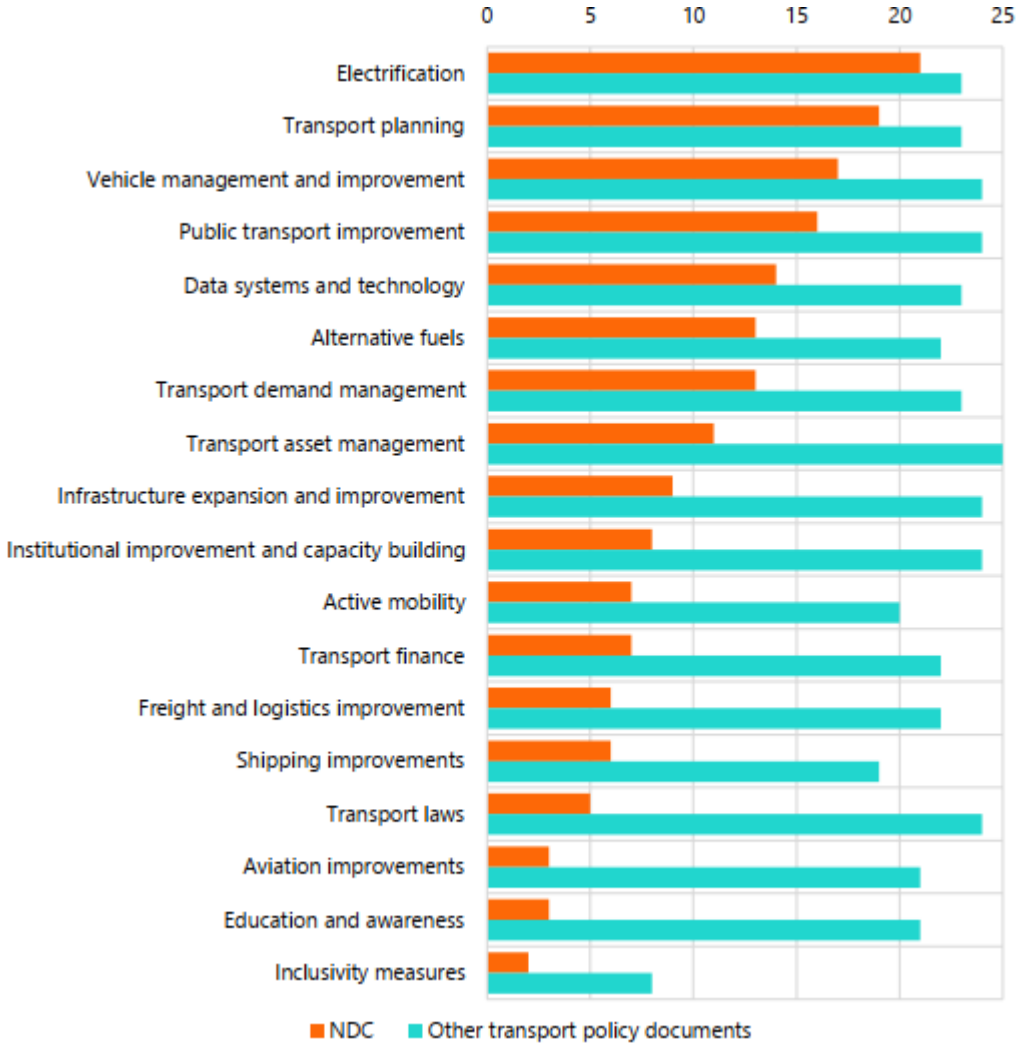
Moving towards better inclusion of sustainability and climate





Recognizing the Embedded Climate-relevant Measures Outside the NDCs





Policy measure types under each lever

Avoid

- Access restriction by corridor/ road
- Development density or intensiveness
- Logistics hub
- Road charging and tolls
- Vehicle taxes
- Parking pricing
- Emissions trading and carbon pricing
- Fossil fuel subsidy elimination
- Freight consolidation
- Fuel tax
- General shared mobility
- Measures to increase car occupancy
- Number of vehicle registration limit
- General commuter trip reduction
- Mixed use development
- Teleworking
- Pricing control for app-based mobility

Shift

- General public transport
- General inland waterways (IWT) improvement
- Active transport infrastructure expansion
- Target - Modal shift
- BRT
- Design standards for sidewalks and bicycle paths
- General rail improvement
- Freight rail infrastructure improvement
- High-speed rail (HSR)
- Intermodality measures
- Non-urban passenger rail infrastructure improvement
- Public transit integration
- Urban passenger rail infrastructure improvement
- Express lanes/ public transport priority
- Budget/ identification of public transport projects
- Freight transport shifting to rail or inland waterways (IWT)
- General IPT/ paratransit measures
- Port infrastructure improvements
- Budget/ identification of active mobility projects
- General micromobility
- Mobility-as-a-service (MAAS)

Improve

ROAD

- Passenger and freight load limits
- Road-side checks on overloading
- Road-side vehicle technical checks
- Routine transport asset maintenance
- Technical standards transport infrastructure
- Asphalt mix resurfacing
- Performance-based transport maintenance contracts
- Vehicle emission standards
- Vehicle import inspections
- Vehicle inspection and maintenance
- Vehicle labelling
- Vehicle scrappage schemes
- Accreditation of vehicle inspection centers
- Ecodriving
- Intelligent transport systems (ITS)
- Traffic management

RAIL

- General freight and logistics improvements
- Rolling stock electrification
- General infrastructure improvements

WATER

- Vessel scrappage and retrofit schemes
- Bunkering infrastructure for alternative fuels
- Programs to reduce emissions in logistics

AVIATION

- Air traffic management
- Emission standards for aircraft
- Aircraft fleet renovation
- Jet fuel policies

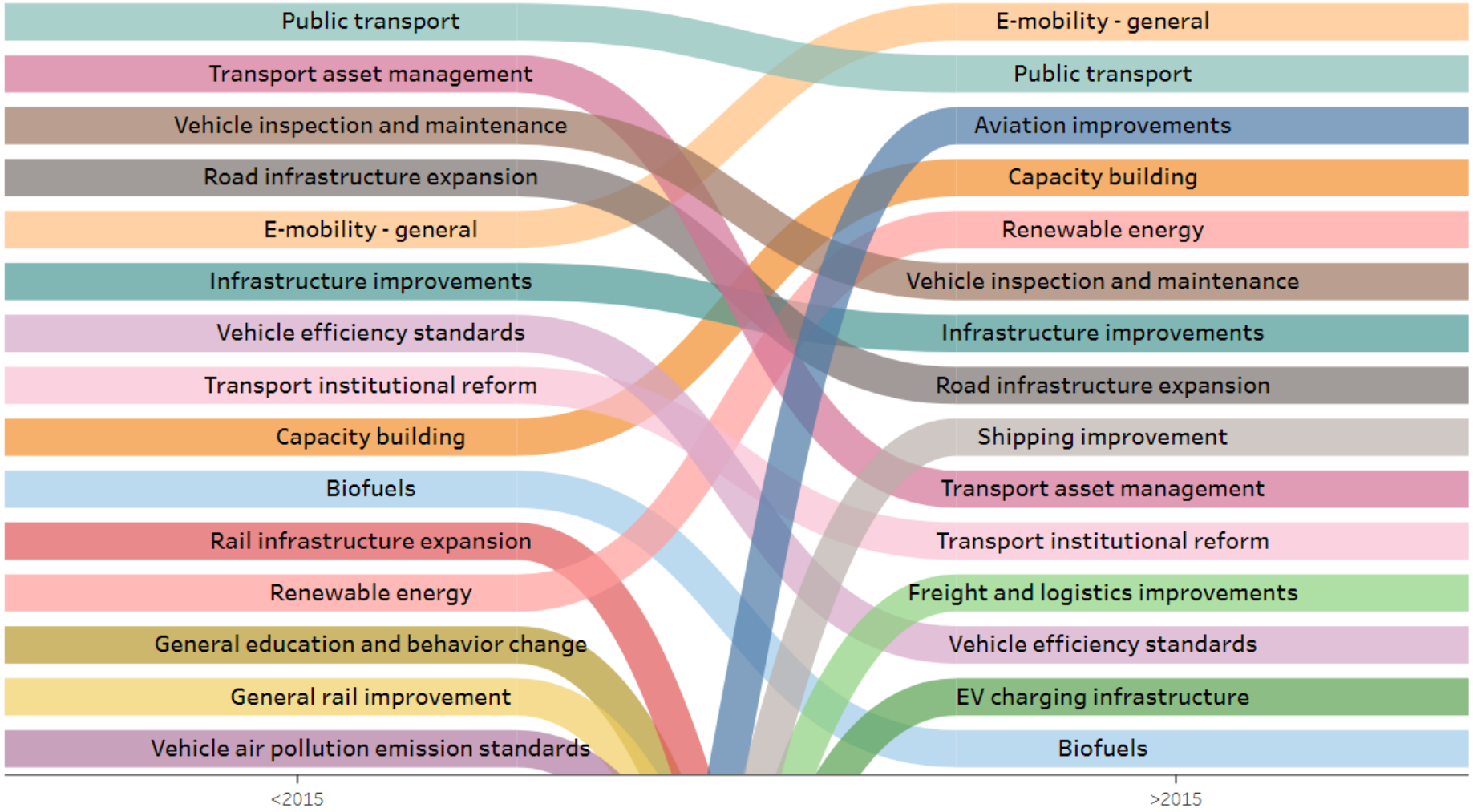
ASSET MANAGEMENT

- Technologies on transport asset management
- Transport asset condition assessment
- Transport asset management funding strategy
- Transport asset management information system
- Technical standards transport infrastructure

Transform

- Renewable energy
- Electric vehicle readiness requirements for new or refurbished buildings
- Charging infrastructure

Evolving transport policy landscape



Evolving transport policy landscape – Sub-regions

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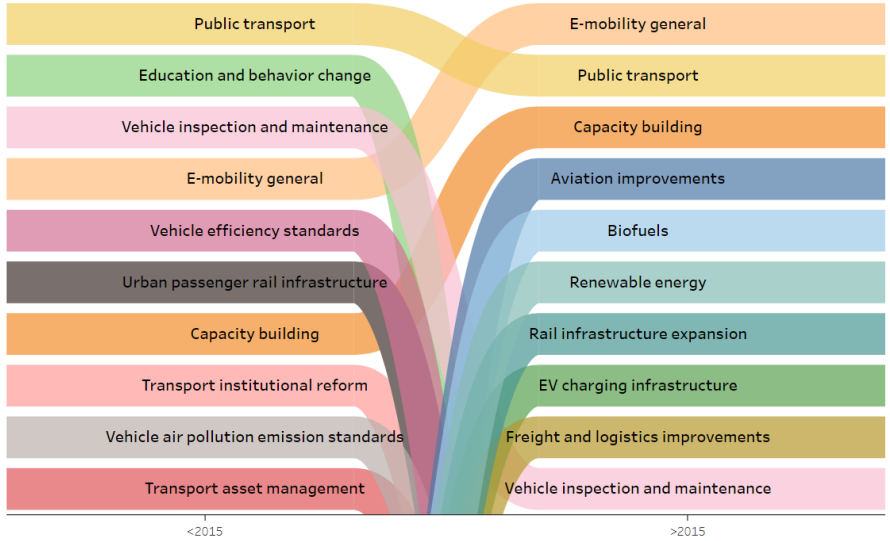
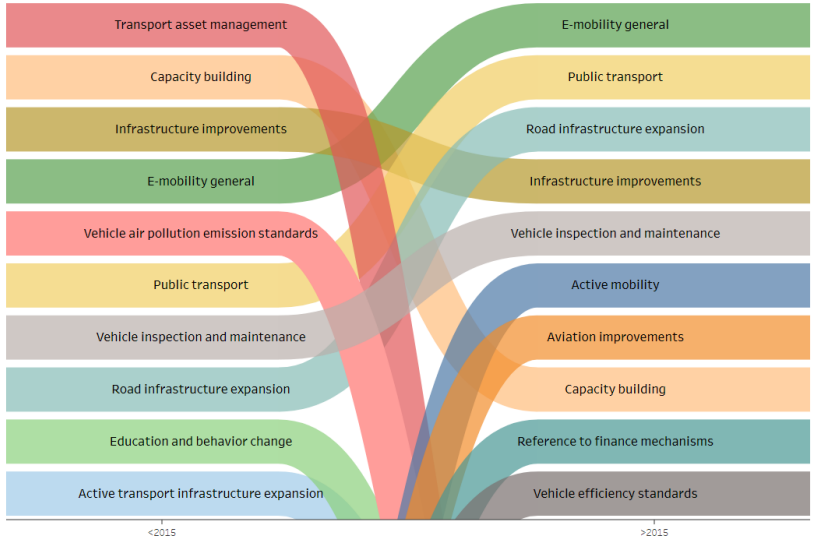
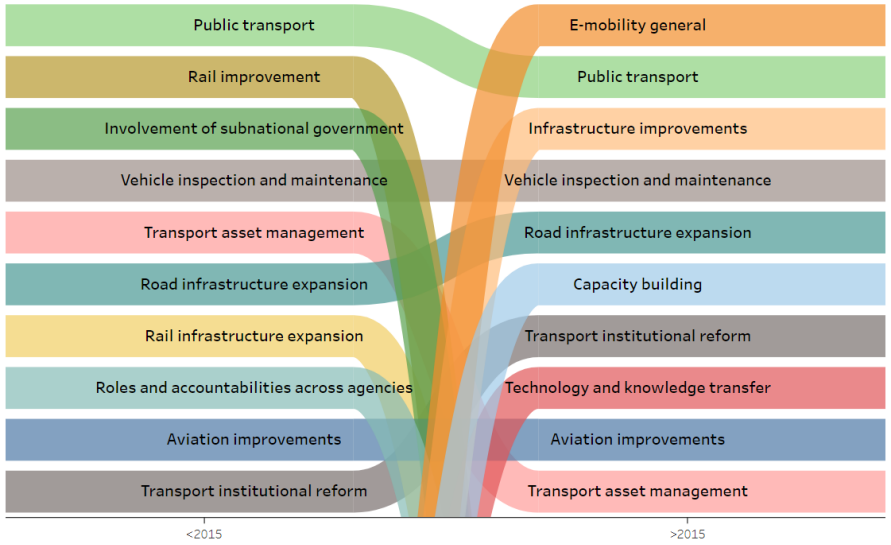
South East Asia



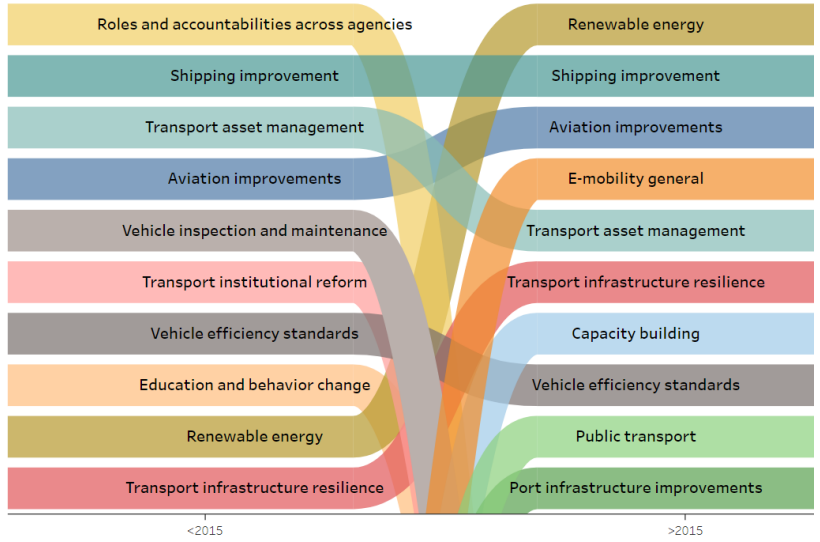
South Asia



Central and West



Pacific



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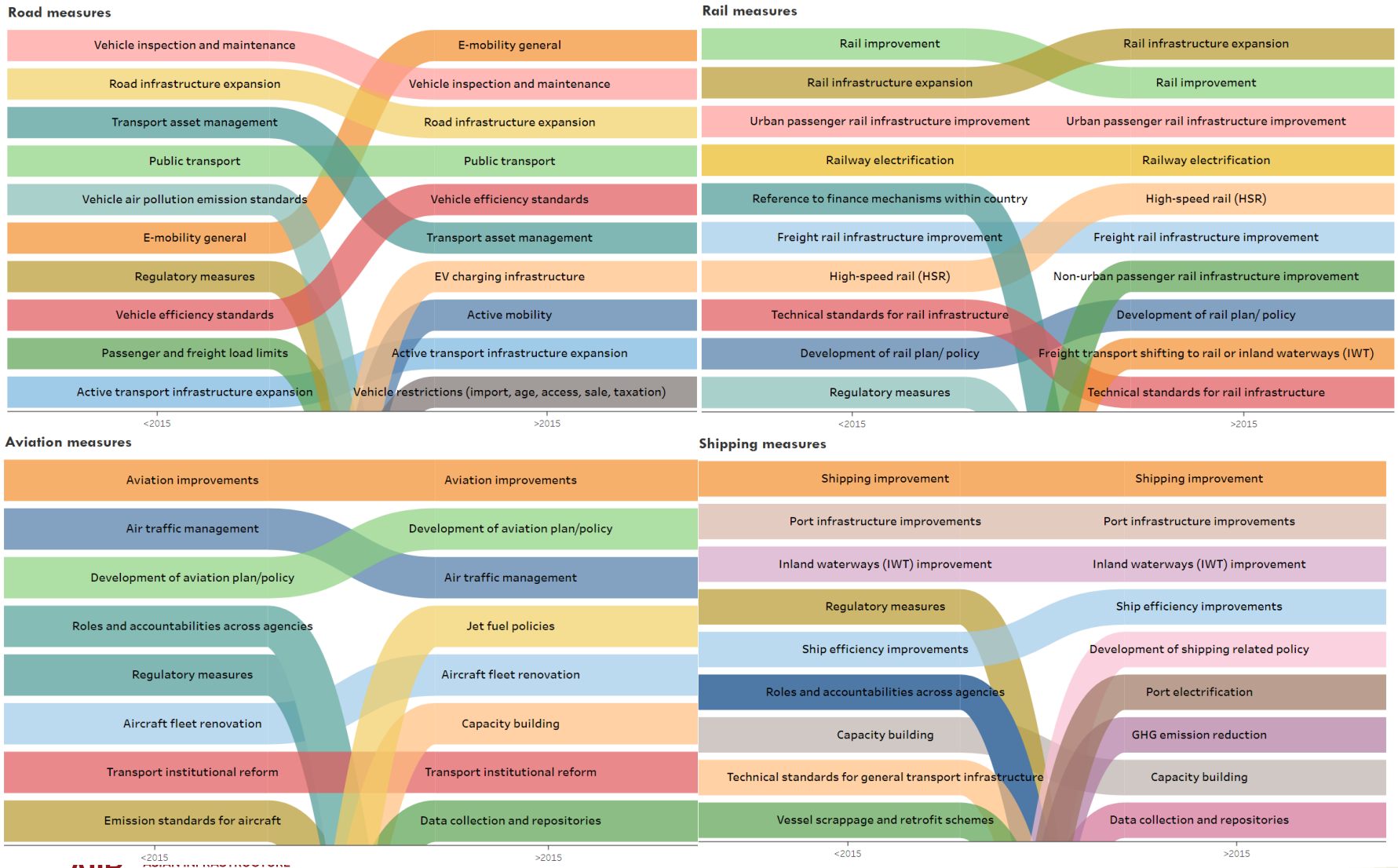
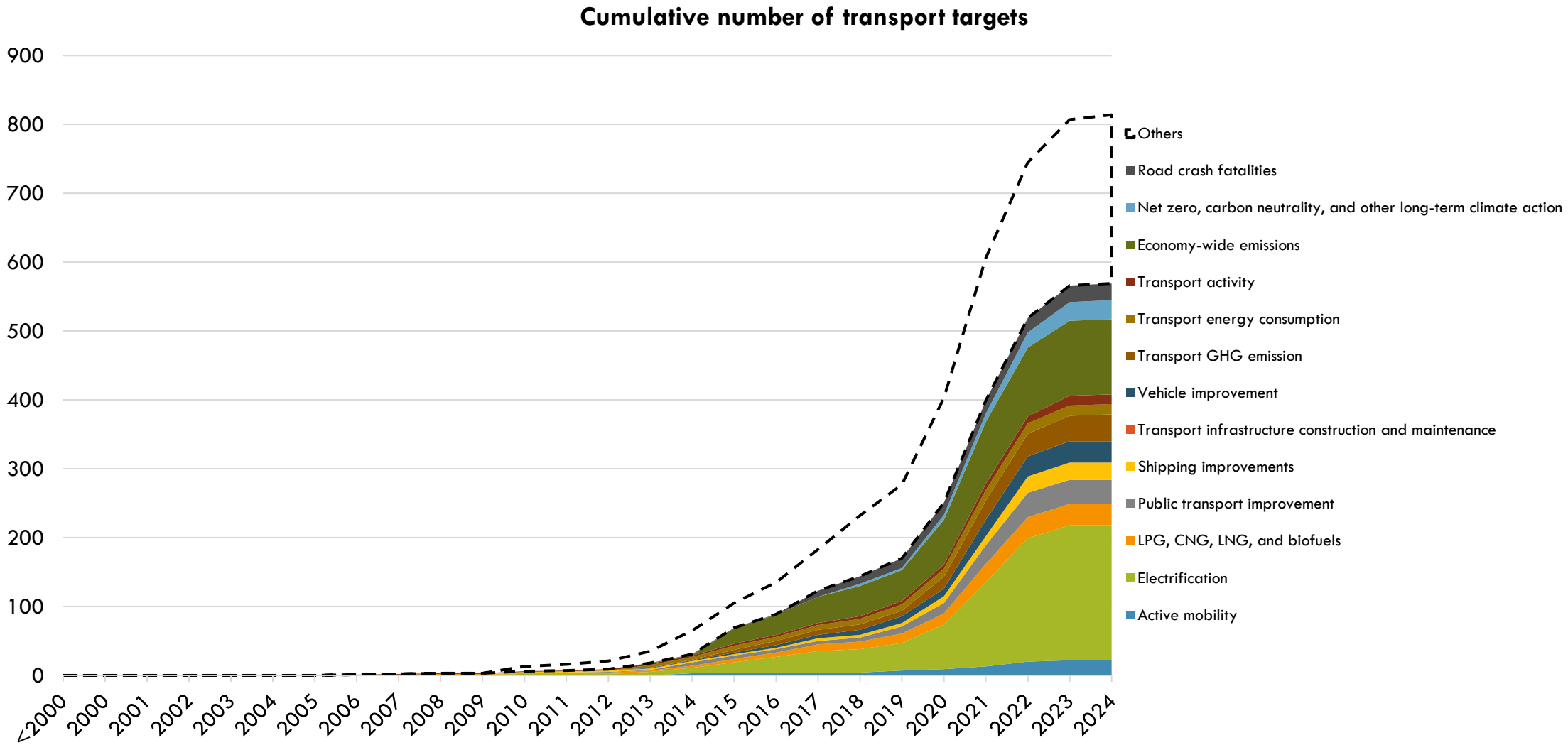
Evolving transport policy landscape – Modes



Uptake of Relevant Targets



Relevant Targets : Highlights

PAKISTAN

Improve	General e-mobility	9
Transform	Target - Economy-wide emissions	3
Transform	Renewable energy	3
Improve	General vehicle improvements	2
Transform	Technical standards for road infrastructure	2
Shift	Transport activity	2
Improve	Biofuels	2
Improve	Vehicle air pollution emission standards	2
Improve	Development of e-mobility transport plan/policy	2

PAPUA NEW GUINEA

Transform	Net zero, carbon neutrality	5
Transform	Renewable energy	5
Improve	General e-mobility	4
Improve	General aviation improvements	3
Improve	General transport asset management	3
Transform	EV charging infrastructure	2
Improve	General shipping improvement	2
Transform	Economy-wide emissions	1
Improve	Port infrastructure improvements	1
Improve	General inland waterways (IWT) improvement	1
Improve	EV manufacturing	1
Transform	Smart charging	1

PHILIPPINES

Transform	Renewable energy	3
Transform	Economy-wide emissions	3
Shift	Transport activity	2
Improve	General e-mobility	2
Transform	Transport GHG emission	1
Transform	Transport energy consumption	1
Improve	Travel time improvement	1
Avoid	General active mobility	1
Shift	Modal shift	1

SHIFT Supporting measures include stronger rail freight, safer vehicles, and expanded infrastructure

IMPROVE Widespread adoption of electric vehicles, supported by national plans and cleaner fuel standards ; cleaner fuels and vehicles

TRANSFORM A major shift to renewable energy is planned to power transport coupled with economy-wide GHG targets.

SHIFT support for e-buses*
IMPROVE Improve road, airport, and port infrastructure quality; new vehicles electric shares targets
TRANSFORM a cleaner energy mix, targeting 35% renewables and major economy-wide GHG cuts by 2030

AVOID increase in cycle ownership

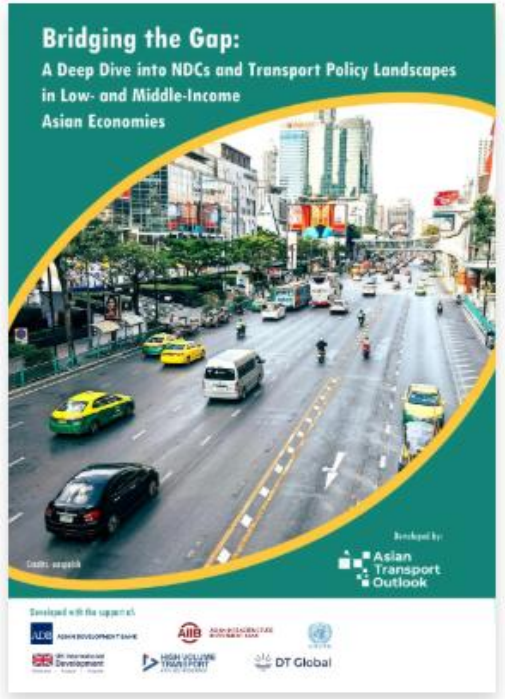
SHIFT increase activity - sea and air

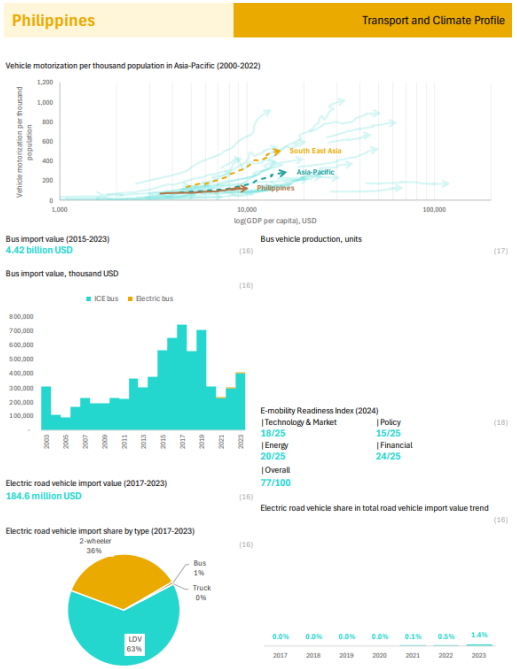
IMPROVE Expand EV adoption in fleets and boost fuel and operational efficiency across air, sea, and land transport.

TRANSFORM a cleaner energy mix, targeting 35% renewables and major economy-wide GHG cuts by 2030.

Further references

- **Bridging the Gap:** A Deep Dive into NDCs and Transport Policy Landscapes in Low- and Middle-Income Asian Economies
- Accompanying **country profiles** (24 LMICs in total)
  - Pakistan
  - Papua New Guinea
  - Phiippines





XIII. Indirect Transport Climate Change Targets

This table shows non-GHG targets as specified in the policy documents in Philippines which indirectly benefit climate change mitigation and adaptation in the transport sector

Document	Year published	Target	Target year
General active mobility			
Philippine Development Plan 2023-2028	2023	Percentage of cycling households in the Philippines increased (% of total households) = 36 (from 29 in 2020)	2028
General e-mobility			
Comprehensive Roadmap for the Electric Vehicle Industry	2022	achieve at least a 5% EV share in corporate and government fleets, public transport operators, and industrial and commercial companies at the end year of the Medium Term (2034) and increasing to 10% by 2040	2034
Comprehensive Roadmap for the Electric Vehicle Industry	2022	achieve at least a 5% EV share in corporate and government fleets, public transport operators, and industrial and commercial companies at the end year of the Medium Term (2034) and increasing to 10% by 2040	2040
Renewable energy			
Comprehensive Roadmap for the Electric Vehicle Industry	2022	The PEP targets a 35% renewable energy share in the country's total energy mix by 2030.	2030
Philippine Development Plan 2023-2028	2023	Share of renewable energy in the power generation mix increased (%) = 33 (from 22.40 in 2021)	2028
Renewable Energy Roadmap 2017-2040	2017	Increased installed capacity to at least 20,000 MW	2040
Target - Modal shift			
Philippine Development Plan 2023-2028	2023	Passenger trips via rail in Metro Manila increased (% share to total passenger trips, cumulative) = 14 (from 1 in 2021)	2028
Target - Road crash fatalities			
Philippine Development Plan 2023-2028	2023	Death rate due to road traffic accidents decreased (per 100,000 population) = 1.68 (from 8.0 in 2020)	2028
Philippine Development Plan 2023-2028	2023	Road traffic accident (crash) rate reduced (number of incidents per 100,000 population) - incidents of accidents (crash) = 2.50 (from 3.85 in 2021)	2028
Philippine Road Safety Action Plan 2023-2028	2023	Reduce road traffic deaths by at least 35% by 2028	2028
Target - Transport activity			
Philippine Development Plan 2023-2028	2023	Passengers transported via air and sea increased (number of passengers, cumulative) = 202.34 million (from 35.72 in 2021)	2028
Philippine Development Plan 2023-2028	2023	Cargo transported via air and sea increased (international and domestic) (metric ton, cumulative) = 1850 million (from 470.30 in 2021)	2028
Target - Transport energy consumption			
Philippines Energy Efficiency and Conservation Roadmap 2017-2040	2017	Annual energy saved by 2040 (KTOE) = 4,500 Implied annual savings = 1.9% Total savings = 25%	2040
Travel time improvement			
Philippine Development Plan 2023-2028	2023	Travel time (decreased) via land per key corridor (hours) = 3.207 (from 2.38 in 2021)	2028

Summary

- There has been a noticeable acceleration in the adoption of transport policy measures that incorporate sustainability and climate considerations across the region
- Many impactful measures and targets exist outside climate-specific policy documents. These need to be acknowledged, as they can shape emissions trajectories both directly and indirectly.Avoid, shift, improve (and transform measures) may differ in terms of form, and intensity, and need to be contextualized to be impactful and effective
- A shift in priorities is also evident—most notably, the growing momentum around electric mobility and related infrastructure.
- However, significant gaps in terms of achieving holistic sets of measures remain. A more integrated and coordinated approach is still needed to ensure sustained impact across all dimensions of sustainable transport

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"ATO translates data into insights, policies, and investments"

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