



Waseda University

中国の都市軌道交通とTOD

Urban Rial Transit and Transit Oriented Development (TOD) in China

2023/09/21

早稲田大学理工学術院

北野尚宏

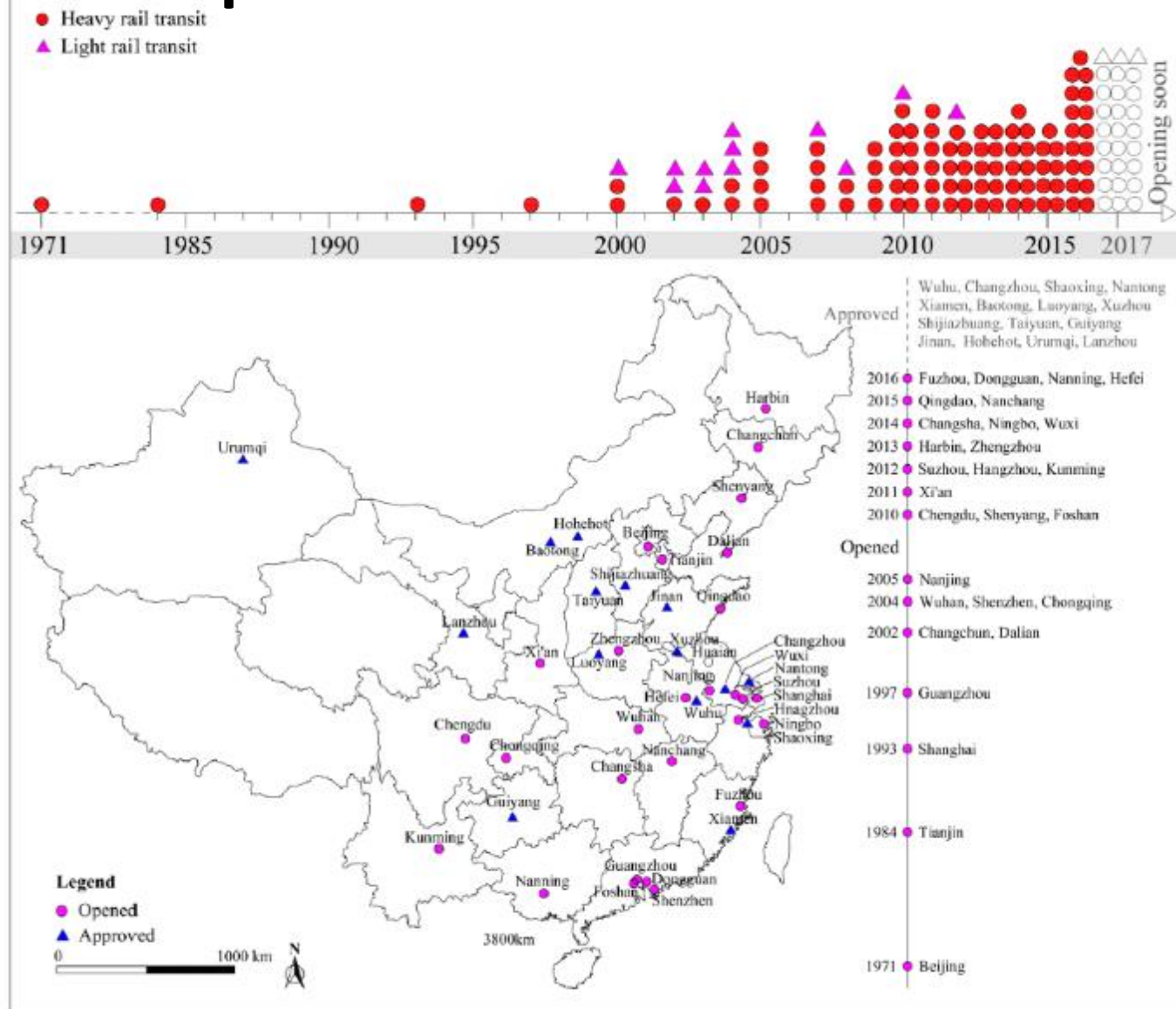
Naohiro Kitano

Faculty of Science and Engineering, Waseda University



中国の都市軌道交通の発展

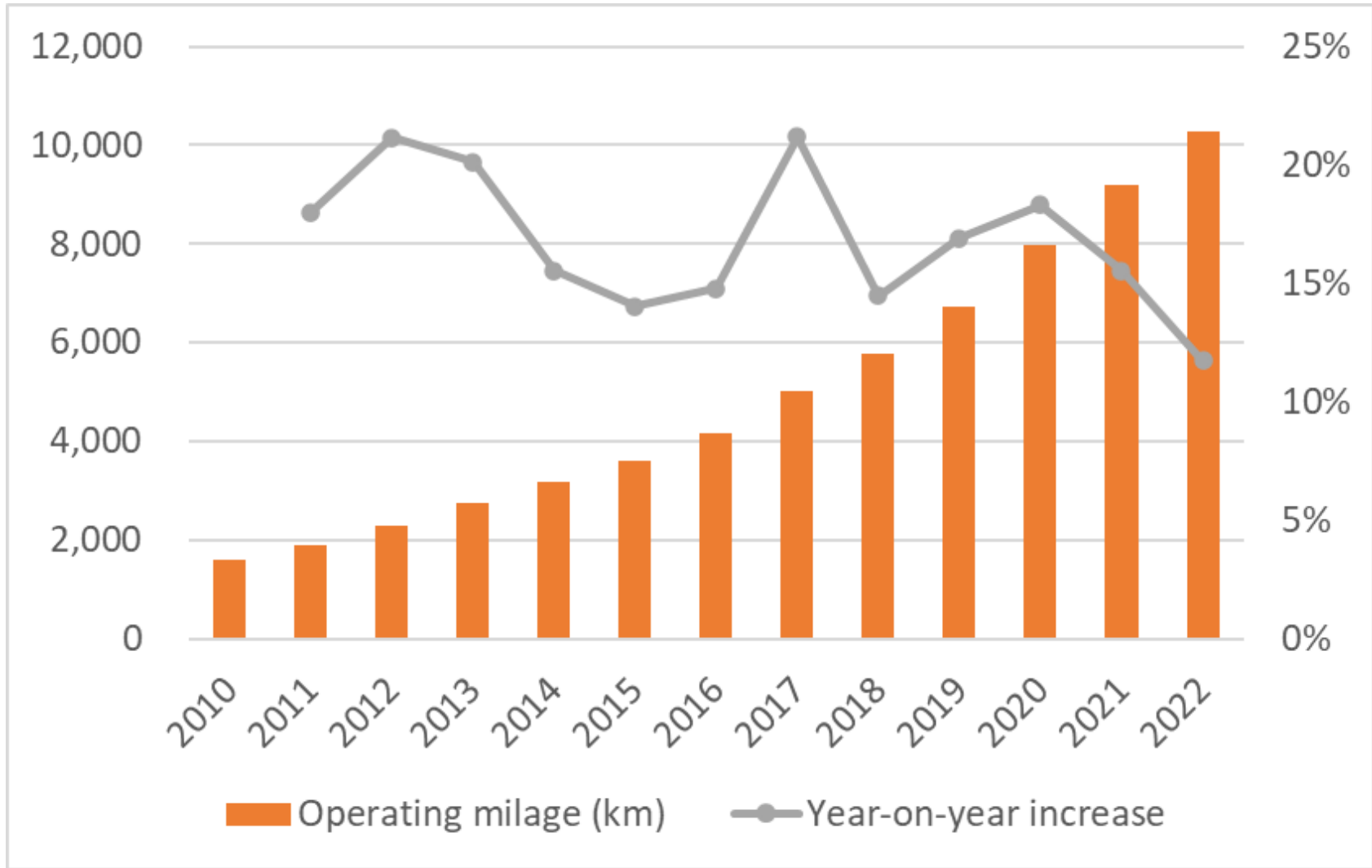
Development of urban rail transit in China



Source: Zhao, J., Li, C., Zhang, R. & Palmer, M. 2018, "Cost of an urban rail ride: A nation-level analysis of ridership, capital costs and cost-effectiveness performance of urban rail transit projects in China", Journal of Transport and Land Use, vol. 11, no. 1



中国の都市軌道交通営業キロ推移(2010~2022年) China's urban rail transit operating mileage, 2010-2022





中国の都市軌道交通の現状

Current status of urban rail transit in China.

- 2022年末時点で、55都市に軌道交通(地下鉄、通勤高速鉄道、路面電車、LRT、モノレール等)が整備
- 路線数 308、営業距離 10,287km、駅数 5,875、乗客数 193億人/年
- 2022年投資額 5,444億元(約11兆円、為替レート約20円/元)
- By the end of 2022, 55 cities in China have rail transit (such including subway, commuter express of urban rail transit, tram, LRT, and monorail)
- 308 lines with an operating milage of 10,287 km, 5,875 stations and 19.3 billion passengers/year
- Investment in 2022: RMB 544.4 billion (approx. USD 75 billion, exchange rate approx. 0.14 USD/RMB)



中国都市軌道交通の課題とTOD

Urban rail transit challenges in China and TOD

- 公共事業による景気浮揚策という側面→軌道交通事業者は多額の借入→負債比率が高いケースが少なくない
- 経営改善のために、都市開発・土地利用と一体化して地価上昇分を開発利益として公共還元するスキームとして、TODがブーム
- Aspect of public works as a measure to boost the economy → Transport operators borrow heavily → Debt ratios are high in many cases
- TOD is booming as a scheme to capture land value increases and return it to the public by integrating urban development and land use



中国都市軌道交通の課題とTOD

Urban rail transit challenges in China and TOD

- 地方政府や不動産企業が主導するTOD事業の仕組みは都市ごとに異なる
- 深圳、北京、成都、武漢、杭州、広州等の都市では、独自のTOD制度を導入
- The TOD scheme led by local governments and real estate companies differs from city to city
- Cities such as Shenzhen, Beijing, Chengdu, Wuhan, Hangzhou and Guangzhou introduced their own TOD schemes



TOD関連政策の事例

TOD policy measures: Examples

中央政府レベル Central government level

- 2021年 「国家総合立体交通網計画綱要」(国家総合交通計画大綱)
「公共交通指向の都市土地開発モデルを推進する。」
- 2022年 国家発展改革委員会「『第14次5カ年計画』新型都市化実施方案の通知」 「公共交通指向型開発(TOD)モデルを推進」
- 2021 National Comprehensive Three-dimensional Transportation Network Planning Outline "Promote a public transport-oriented urban land development model."
- 2022 National Development and Reform Commission Notice on the implementation measures of the new urbanization during the '14th Five-Year Plan' "Promote the public transport-oriented development (TOD) model "

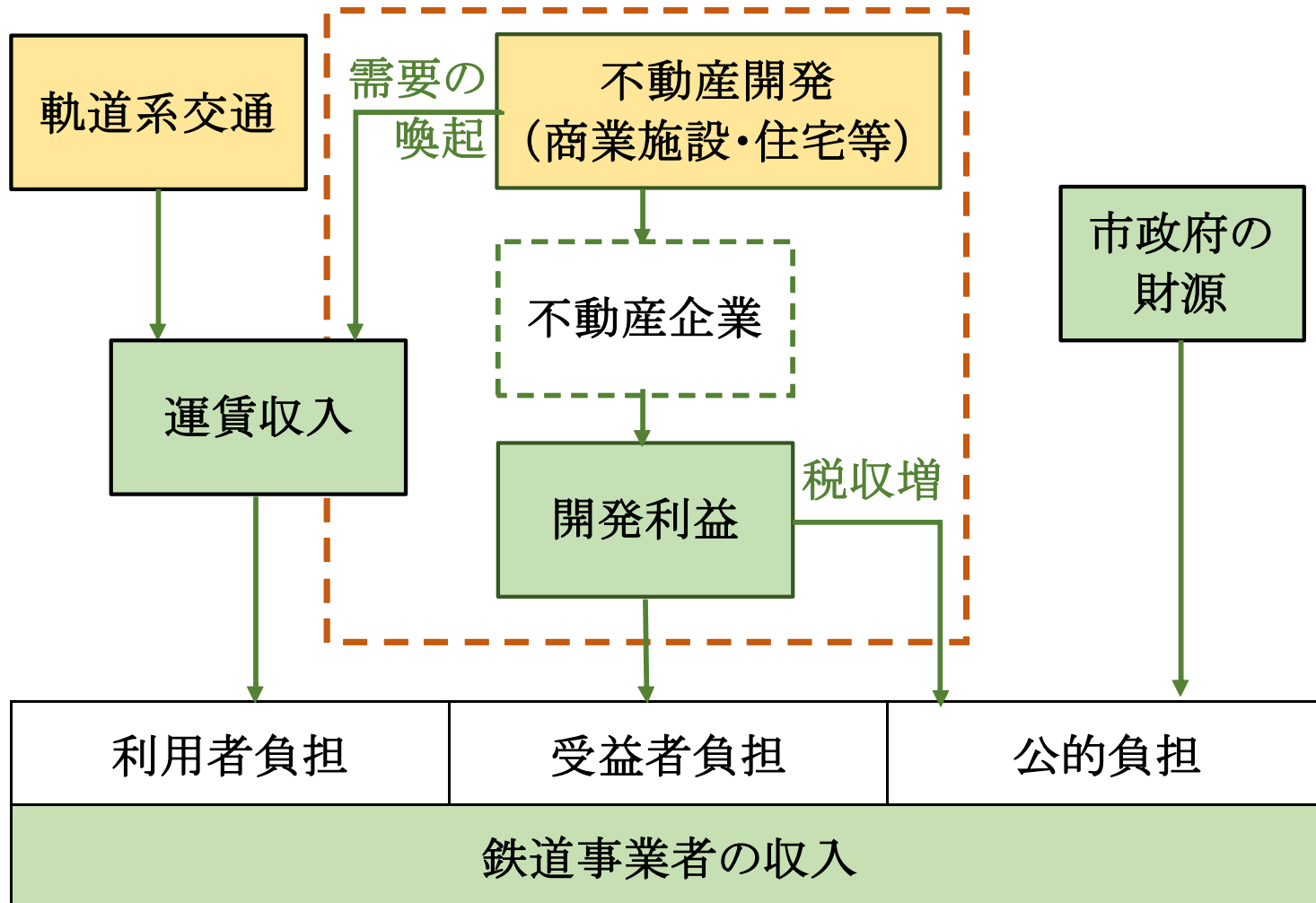
地方政府レベル Local government level

- 2018年 北京市 「鉄道駅と周辺土地の統合計画と建設の強化に関する意見」
- 2018 Beijing "Opinions on strengthening the integrated planning and construction of railway stations and surrounding land"



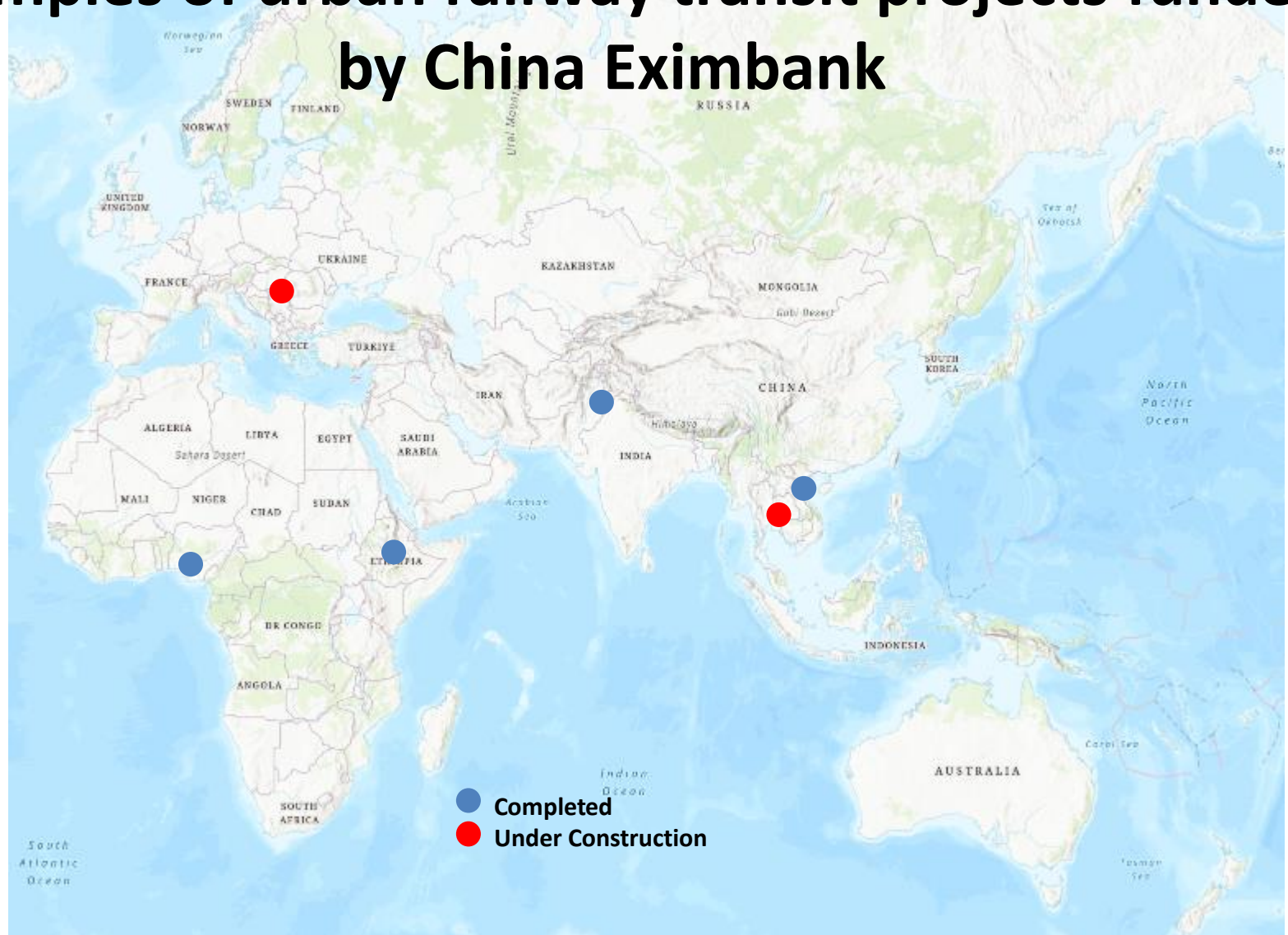
中国のTOD開発利益公共還元制度の一例

An example of China's TOD development profit sharing system

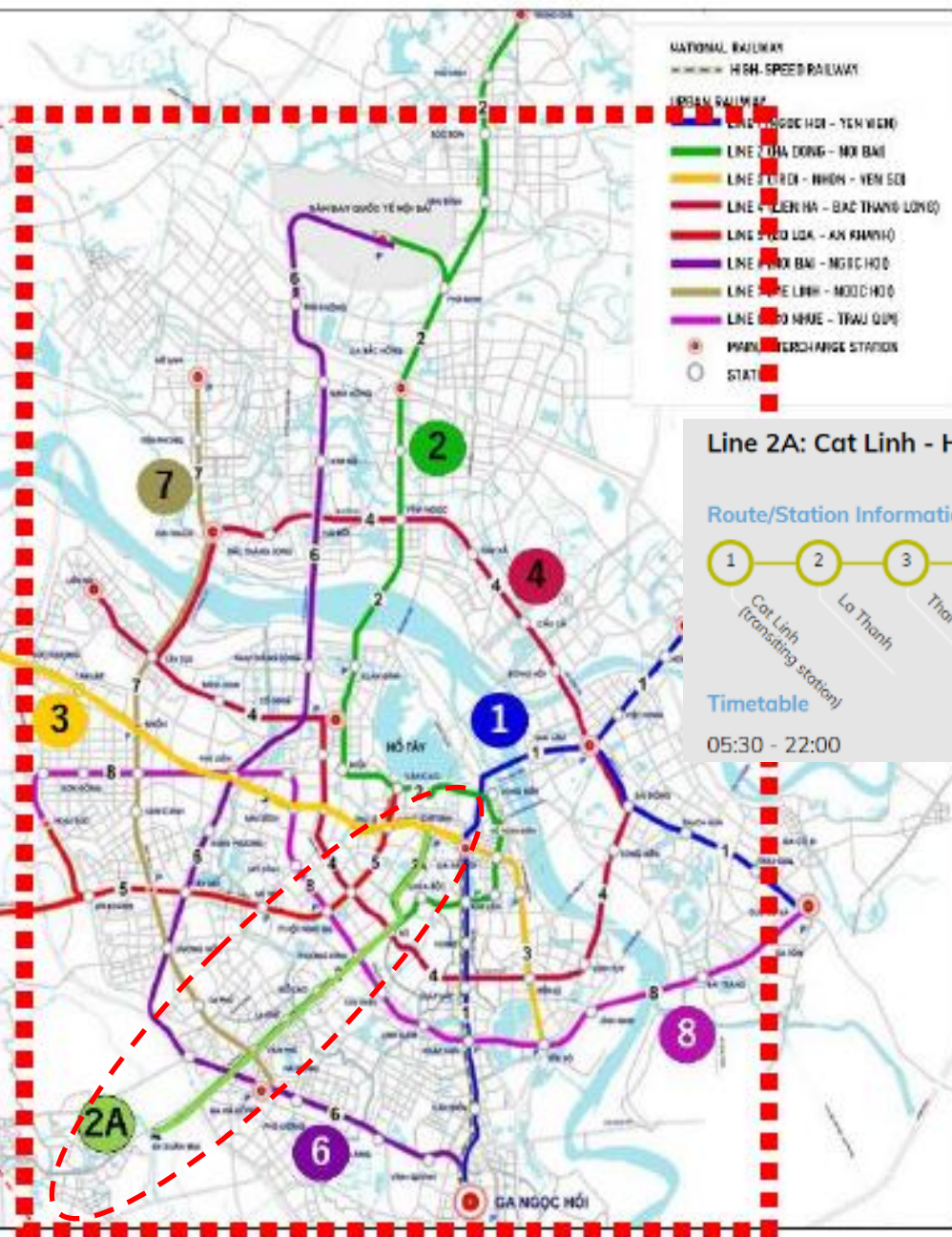


中国輸銀融資による都市軌道交通事業の事例

Examples of urban railway transit projects funded by China Eximbank



ハノイ地下鉄 2A号線 Hanoi Metro Line 2A



Line 2A: Cat Linh - Ha Dong

Route/Station Information



Timetable

05:30 - 22:00





