



Public-Private Partnerships DOTC Project Pipeline

29 September 2014, Singapore

Key Performance Indicators

1. Reduce transport cost by 8.5%
 - Increase urban mass transport ridership from 1.2M to 2.2M (2016)
 - Development of intermodal facilities
2. Lessen logistics costs from 23% to 15%
 - Improve transport linkages and efficiency
3. Airport infra for 10M foreign and 56M domestic tourists
 - Identify and develop key airport tourism destinations to improve market access and connectivity
4. Reduce transport-related accidents
 - Impose standards and operating procedures

Awarded and for Implementation

- Automatic Fare Collection System
- Mactan-Cebu Int'l Airport
- LRT 1 Cavite Extension
- MRT 7 (unsolicited; for implementation)

Under Procurement

- Integrated Transport System – Southwest
- Integrated Transport System – South
- LRT 2 Operations/Maintenance

For Rollout

- New Bohol Airport Expansion, O&M
- Laguindingan Airport EO&M

For Approval of Relevant Government Bodies

- Puerto Princesa Airport EO&M
- Iloilo Airport EO&M
- Davao Airport EO&M
- Bacolod Airport EO&M
- Davao Sasa Port
- Motor Vehicle Inspection System

Estimated Total Project Cost:

USD 15.87 billion

With On-going Studies

- North-South Railway
- Mass Transit System Loop
- Manila Bay-Pasig River Ferry System
- Integrated Transport System – South
- Clark International Airport EO&M
- LRT Line 1 Dasmariñas Extension
- C-5 BRT

For Procurement of Transaction Advisors

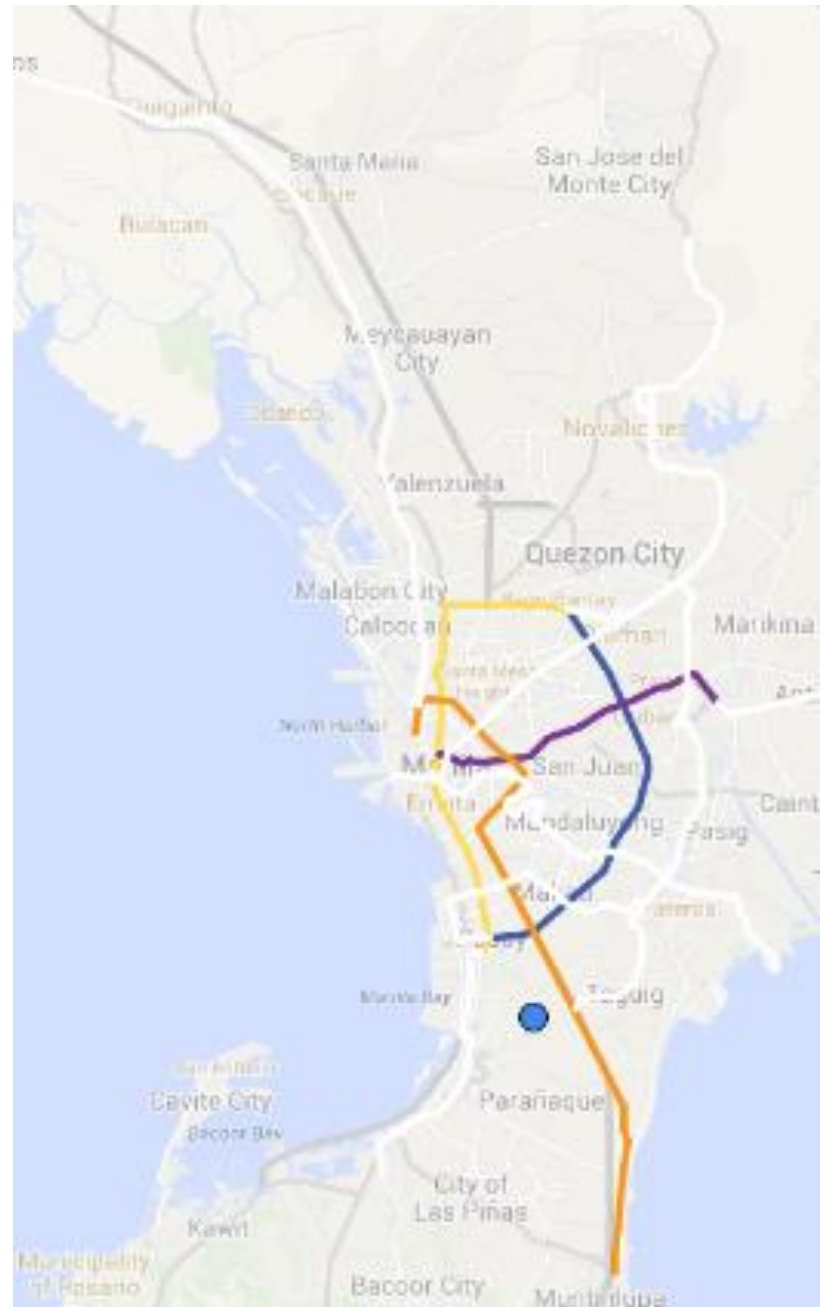
- NAIA Development
- Manila East Mass Transit System
- R1-R10 Link Mass Transit System
- Road Transport IT Infrastructure Project Phase II
- Central Spine RoRo
- MRT Line 3 O&M

Other Major Projects (GAA)

- MRT 3 Capacity Expansion
- Manila BRT
- LRT 2 East Extension
- LRT 2 West Extension
- New Bicol International Airport
- Expansion & Improvement of Other Key Tourism and Secondary Airports
- Other Airport Projects



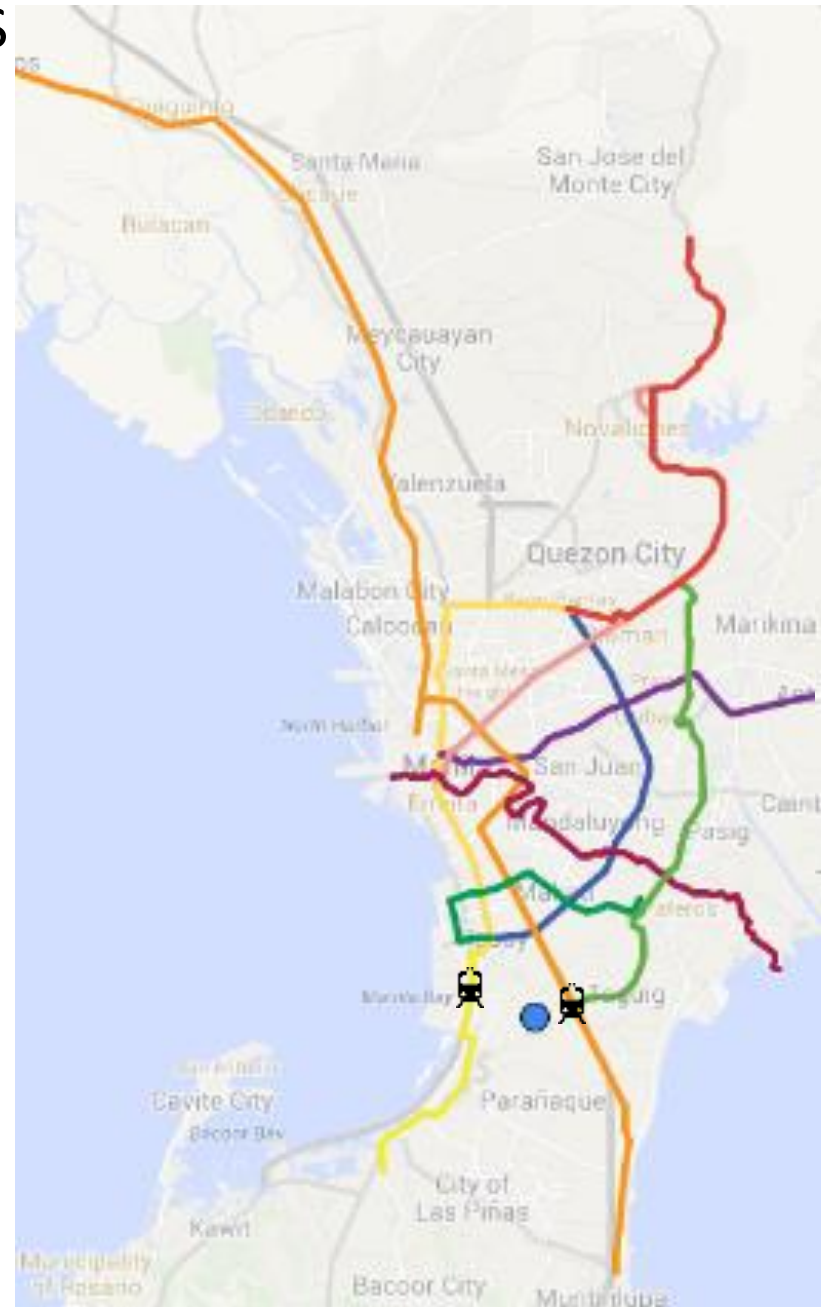
EXISTING MASS TRANSIT SYSTEMS



MASS TRANSIT SYSTEM PROJECTS

- AFCS **USD 38.2 M**
- C-5 BRT **USD 300 M**
- Manila BRT **USD 106.7 M**
- MRT 3 Capacity Expansion **USD 85.6 M**
- MRT 3 O&M **TBD**
- Mass Transit System Loop **USD 4,445 M**
- ITS Southwest **USD 55.6 M**
- ITS South **USD 88.9 M**
- ITS North **TBD**
- Manila Bay – Pasig River Ferry Service **TBD**
- LRT 1 South Extension **USD 1,422 M**
- LRT 1 Dasmariñas Extension **TBD**
- MRT 7 **USD 1,540 M**
- LRT 2 East Extension **USD 200 M**
- LRT 2 West Extension **USD 220 M**
- LRT 2 O&M (*no capex*)
- North-South Railway – North **USD 2,600 M**
- North-South Railway – South **USD 1,533 M**

Total USD 12,635 M



EXISTING MASS TRANSIT SYSTEMS

LRT 1

- Roosevelt – Baclaran
- 19.65 km

LRT 2

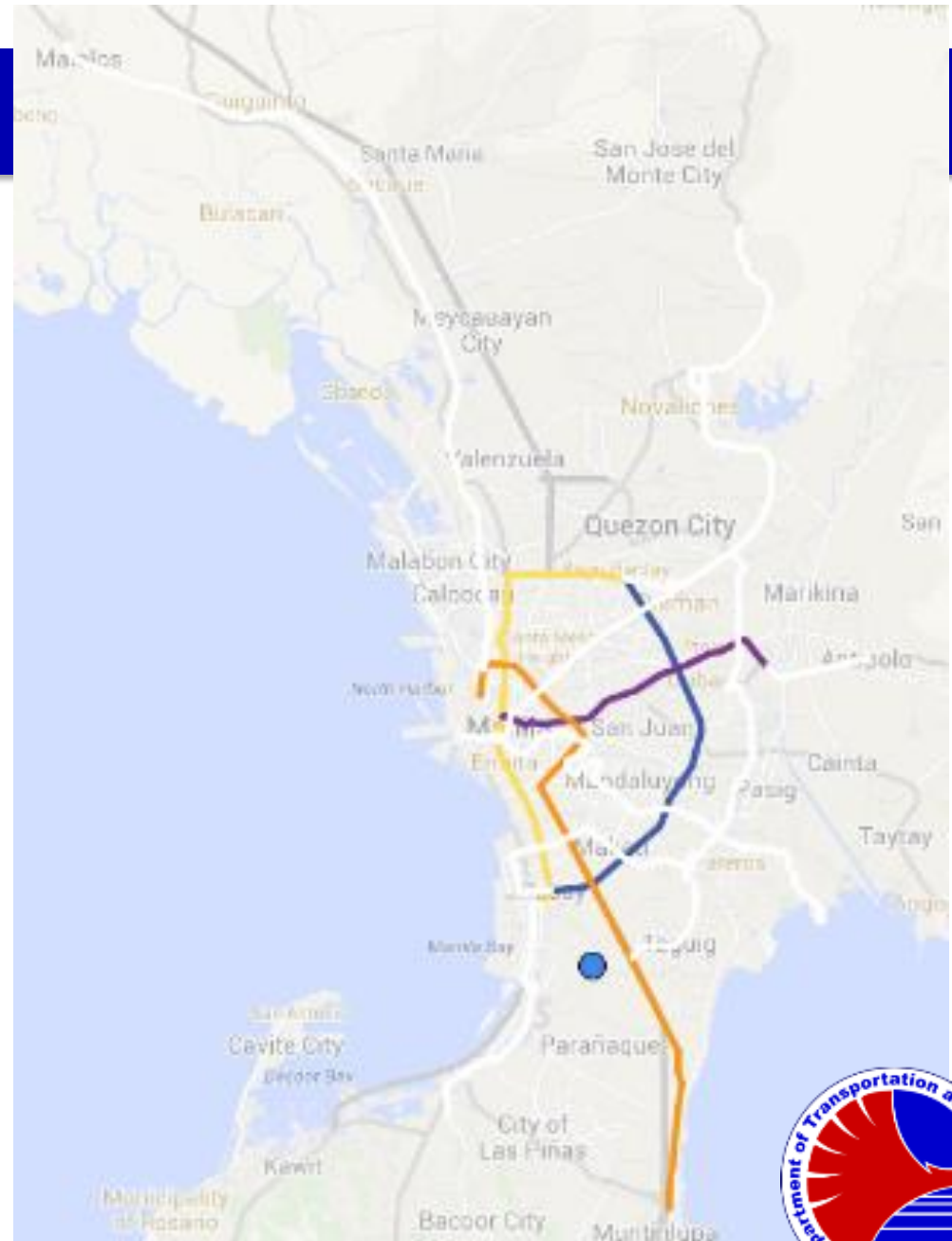
- Recto – Santolan
- 13.8 km

MRT 3

- North Avenue – Taft Avenue
- 16.3 km

North-South Railway

- Tutuban - Cabuyao
- 52.9 km



AUTOMATIC FARE COLLECTION SYSTEM (AFCS)

Project Details

- USD 38.2 M (PHP 1.72 B)
- Creates uniform ticketing system for rail and bus projects, excluding the North-South Railway

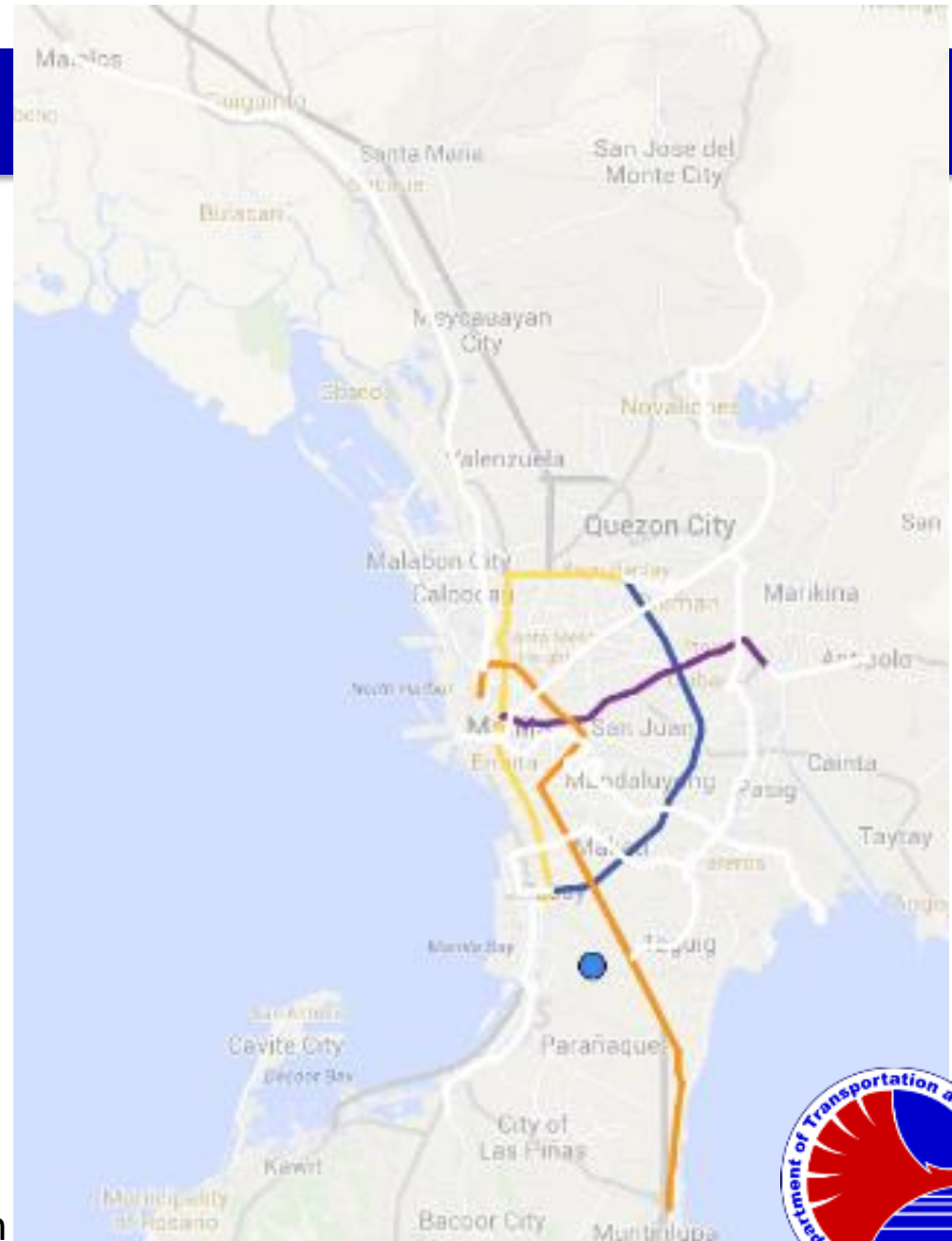
Fare System (2015 Rates)

- USD 0.31 (PHP 14) boarding fee
- PHP 1.2/km distance fee
- 5% annual increase to account for inflation

Benefits

- Saves USD 0.22 (PHP 10)
- Saves 20 min

Status: Awarded and for Implementation



C-5 BRT

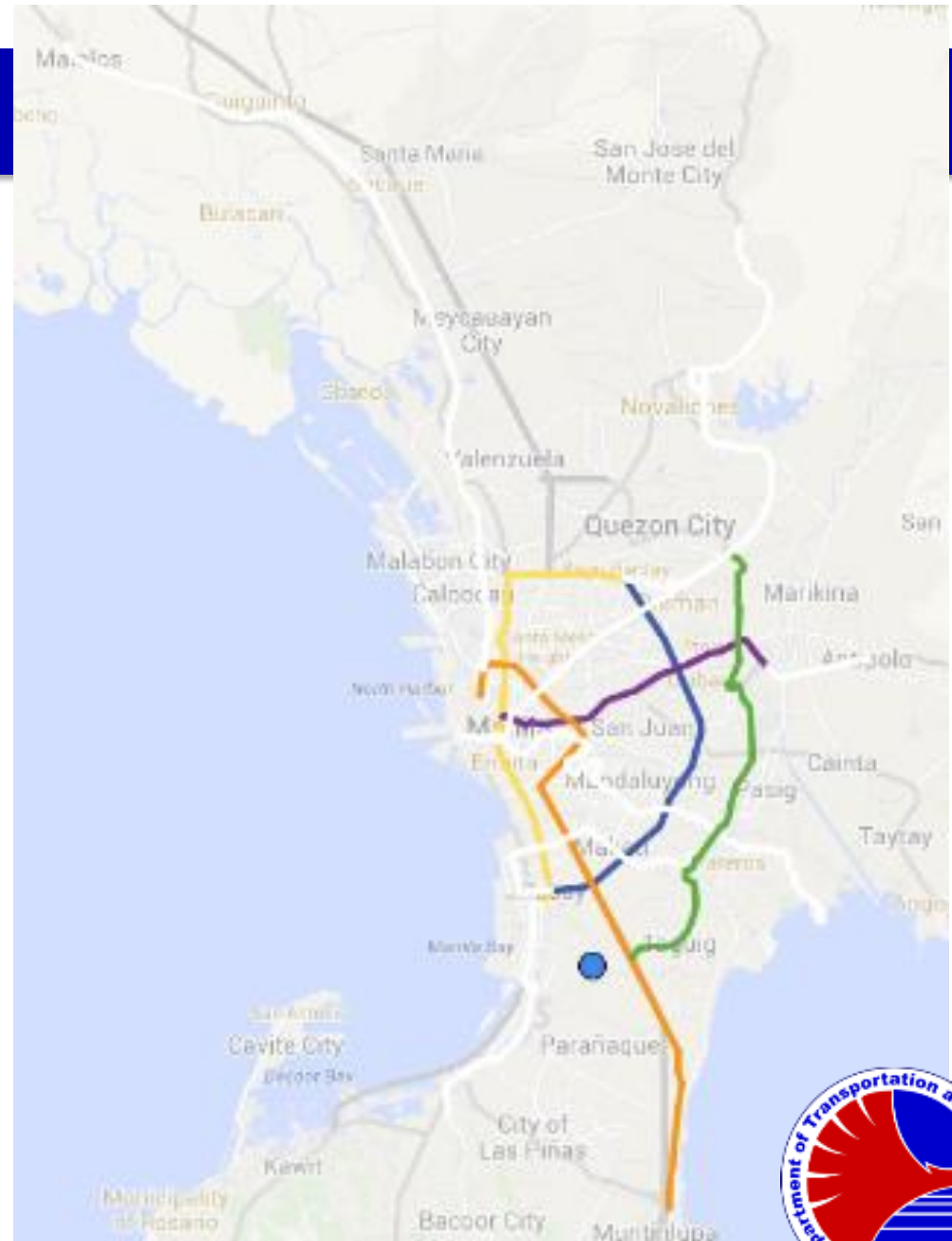
Project Details

- USD 300 M (PHP 13.5 B)
- 24 km from Commonwealth to FTI
- 24 proposed stations

Benefits

- 50,000 passengers / day
- Travel time: 30 minutes

Status: Study ongoing



MANILA BRT

Project Details

- USD 106.7 M (PHP 4.8 B)
- 13 km from Recto to Quezon City
- 32 stations

Current Mode of Transportation

- Bus and jeepney
- Travel time of 1 hour 30 minutes

Benefits

- 290,000 passengers / day
- Travel time: 45 minutes

Status: Study ongoing



MRT 3 CAPACITY EXPANSION

Project Details

- USD 85.6 M (PHP 3.85 B)
- Includes additional rolling stock and signaling improvements

Benefits

- Increase in daily capacity by 200,000
- Decongest EDSA

MRT 3 Operations & Maintenance

- Scope TBD

Status: Capacity Expansion – Awarded and for Implementation; O&M – For Procurement of Transaction Advisors



MASS TRANSIT SYSTEM LOOP

Project Details

- USD 4,440 M (PHP 200 B)
- 12.7 km connecting Makati City and Taguig City
- 11 stations

Benefits

- 350,000 passengers / day
- Travel time: 15 minutes

Status: Study ongoing



INTEGRATED TRANSPORT SYSTEM TERMINALS

Southwest Terminal (2017)

- USD 56.8 M (PHP 2.5 B)
- PRA property along Manila-Cavite Expressway

South Terminal (2017)

- USD 90.9 M (PHP 4 B)
- FTI, Taguig City

North Terminal (2018)

- Cost TBD
- Location TBD

Benefits

- Seamless transfers
- Eradication of illegal bus operation

Status: South and Southwest – Under Procurement; North – Study ongoing



MANILA BAY – PASIG RIVER FERRY SERVICE

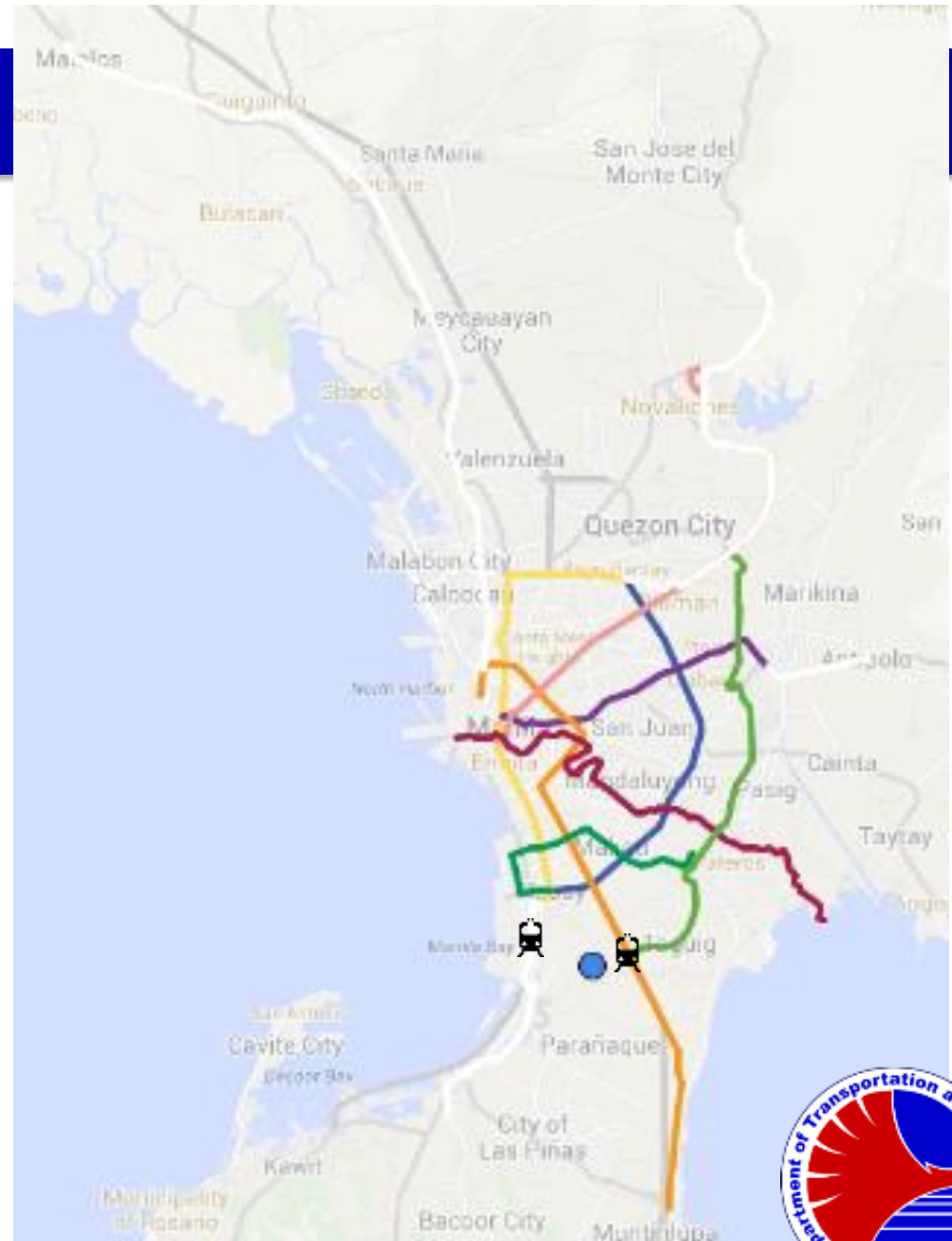
Project Details

- Cost TBD
- Phase 1: Pasig River – Marikina River
- Phase 2: extension to Manila Bay and Laguna Lake
- Includes rehabilitation and construction of modern passenger terminals

Benefits

- Reliable, safe, convenient alternative to road-based public transport

Status: Study ongoing



LRT 1 SOUTH EXTENSION

LRT 1 Cavite Extension Details

- USD 1,422.2 M (PHP 64 B)
- 11.7 km from Bacoor station to Niog, Cavite
- 8 stations

Benefits

- Additional 320,000 passengers / day
- Travel time: 1 hour

LRT 1 Dasmariñas Extension

- TBD

Status: Awarded and for Implementation



MRT 7

Project Details

- USD 1,540 M (PHP 69.3 B)
- 22.8 km from Elliptical Road, Quezon City to San Jose del Monte, Bulacan
- 14 stations

Benefits

- 200,000 passengers / day
- Travel time: 1 hour 10 minutes
- Fare: PHP 32

Status: Awarded and for Implementation



LRT 2 EAST & WEST EXTENSIONS

East Extension Details

- USD 200 M (PHP 9 B)
- 3.93 km from Emerald to Masingag, Antipolo

West Extension Details

- USD 220 M (PHP 9.9 B)
- 4.16 km from Divisoria to Pier 44

Benefits

- Additional 220,00 passengers / day
- Travel time: 55 minutes
- Fare: PHP 35

LRT 2 Operations & Maintenance

- 10-year O&M of LRT 2 system

Status: O&M – Under Procurement



NORTH-SOUTH RAILWAY

Current Operations

- Tutuban, Manila to Cabuyao, Laguna

North Rehabilitation Details

- USD 2,600 M (PHP 117 B)
- 37.5 km from Tutuban to Malolos, Bulacan
- 9 stations

South Rehabilitation Details

- USD 1,533 M (PHP 69 B)
- 16 km from Mamatid and Calamba
- 16 stations

Benefits

- Additional 450,000 passengers / day
- Travel time: 2 hours 30 minutes
- Fare: PHP 180 (vs PHP 950 for bus)

Status: Study ongoing



IMPACT ANALYSIS

USD 14,500 M (PHP 650 B)

9 additional lines

3 additional terminals

2.2 M

additional commuters daily

140

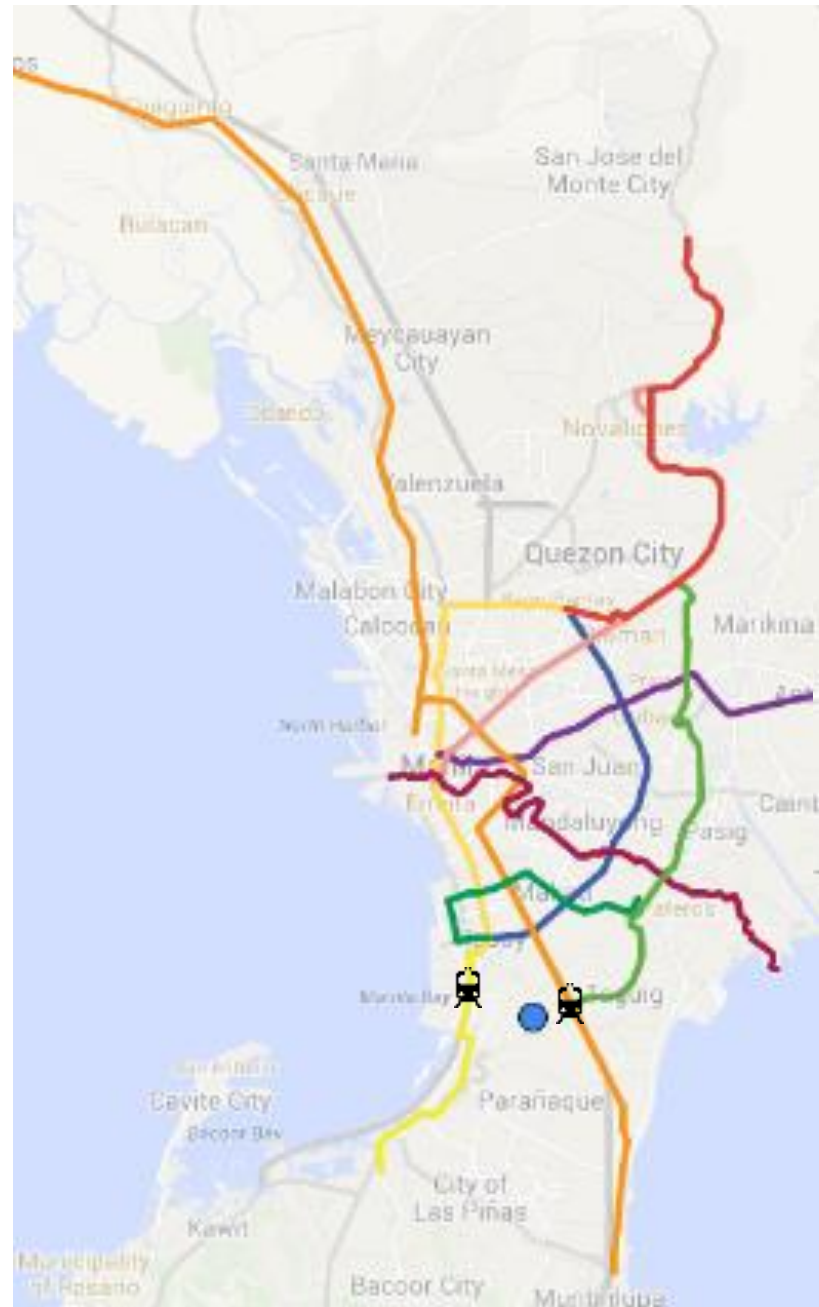
additional passenger stations

120 KM

additional road & rail mass transit

1 hour away

central business district



PHILIPPINE AIRPORTS WITH COMMERCIAL OPERATIONS

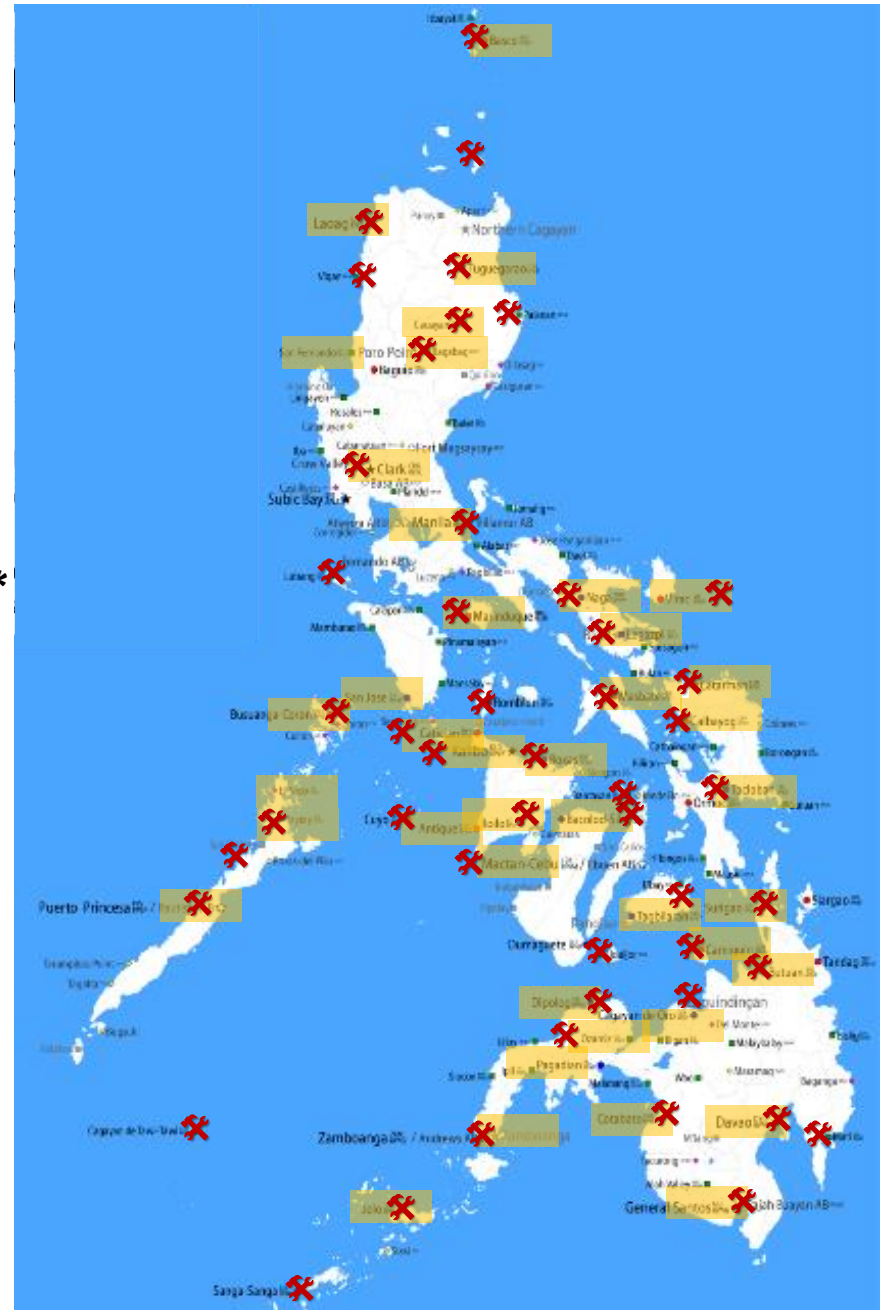


AIRPORT PROJECTS NATIONWIDE

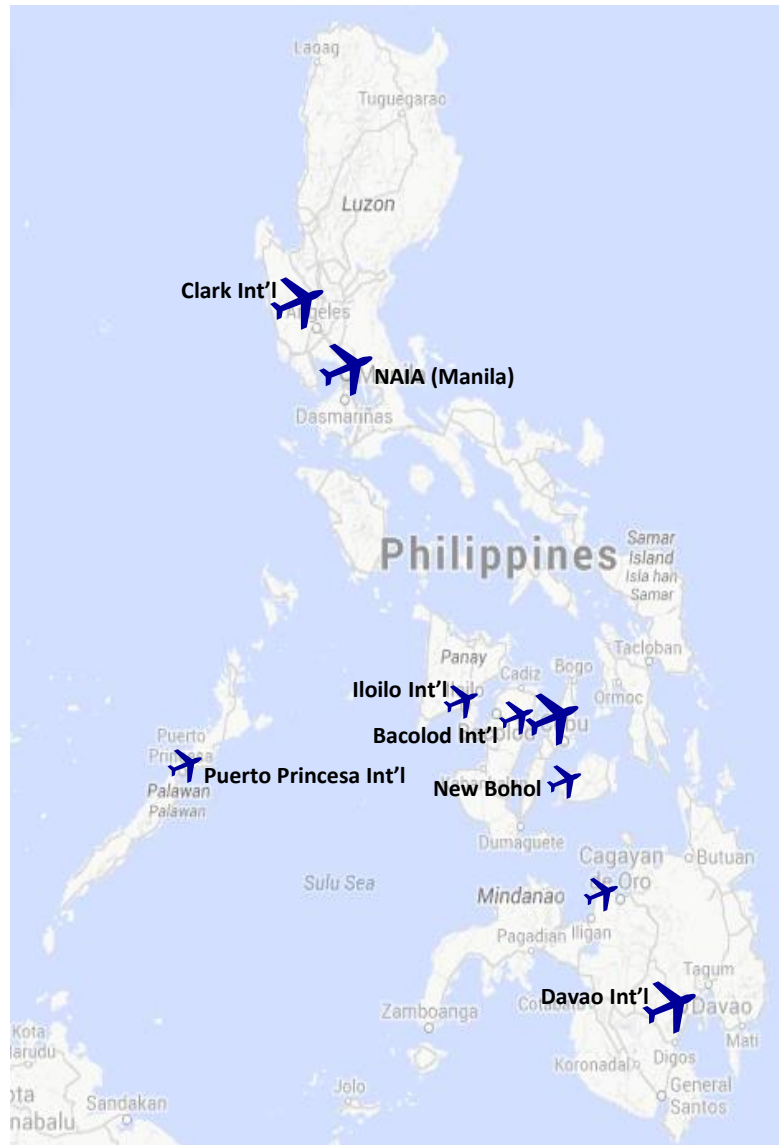
- Manila International (NAIA) **USD 511.1 M***
- Clark International **USD 157.1 M***
- Mactan Cebu International **USD 389.3 M**
- Davao International **USD 130.7 M**
- New Bohol International **USD 106.7 M***
- Laguindingan International **USD 91.3 M**
- Puerto Princesa International **USD 158.7 M***
- Iloilo International **USD 89.6 M**
- Bacolod International **USD 80.2 M**
- Expansion & Improvement of Other Key Tourism Airports **USD 531.1 M**
- Expansion & Modernization of Other Key Secondary Airports **USD 148.2 M**
- Other Airport Projects **USD 44 M**

Total USD 2,436.2 M

**Cost of PPP component not included*



KEY INTERNATIONAL AND PPP AIRPORT PROJECTS



AIRPORTS FOR EXPANSION AND MODERNIZATION	COST (PHP B)	COST (USD M)
Manila (Ninoy Aquino) Int'l	23.000	511.1
Clark Int'l	7.070	157.1
Mactan Cebu Int'l	17.520	389.3
Davao Int'l	5.880	130.7
New Bohol (Panglao)	7.140	158.7
Puerto Princesa Int'l	4.460	99.1
Laguindingan Int'l	2.257	50.2
Iloilo Int'l	4.030	89.6
Bacolod-Silay Int'l	3.610	80.2
TOTAL	74.967	1,666



CLARK INTERNATIONAL AIRPORT

2019

INITIATIVE	DESCRIPTION	COST (USD)
New Terminal	Development of a new terminal building to add capacity; will serve primarily LCCs	157.1 M
O&M	Operations, maintenance, and development of NAIA to be done through public-private partnership (PPP). Scope to be determined during business case phase.	TBD



Status: Study ongoing



DAVAO INTERNATIONAL AIRPORT

2016
start

- Phase 1: USD 130.7 M (PHP 5.880 B)
- Total development cost: USD 901.6 M (PHP 40.57 B)
- Development, operations & maintenance
- Maximum concession period of 35 years
- Includes expansion of passenger and cargo terminal buildings, apron, and other facilities



Status: For approvals



NEW BOHOL (PANGLAO) AIRPORT

2017
start

- USD 101.6 M (PHP 4.57 B)
- Expansion, operations & maintenance
- Maximum concession period of 35 years
- Includes expansion of the passenger terminal building and apron



Status: For roll-out



LAGUINDINGAN INTERNATIONAL AIRPORT

2016
start

- USD 50.2 M (PHP 2.26 B)
- Expansion, operations & maintenance
- Maximum concession period of 35 years
- Includes expansion of the passenger and cargo terminal buildings, runway, and apron



Status: For roll-out



ILOILO INTERNATIONAL AIRPORT

2016
start

- Phase 1: USD 89.6 M (PHP 4.030 B)
- Total development cost: USD 675.6 M (PHP 30.40 B)
- Development, operations & maintenance
- Maximum concession period of 35 years
- Includes expansion of passenger and cargo terminal buildings, apron, and other facilities



Status: For approvals



BACOLOD-SILAY INTERNATIONAL AIRPORT

2016
start

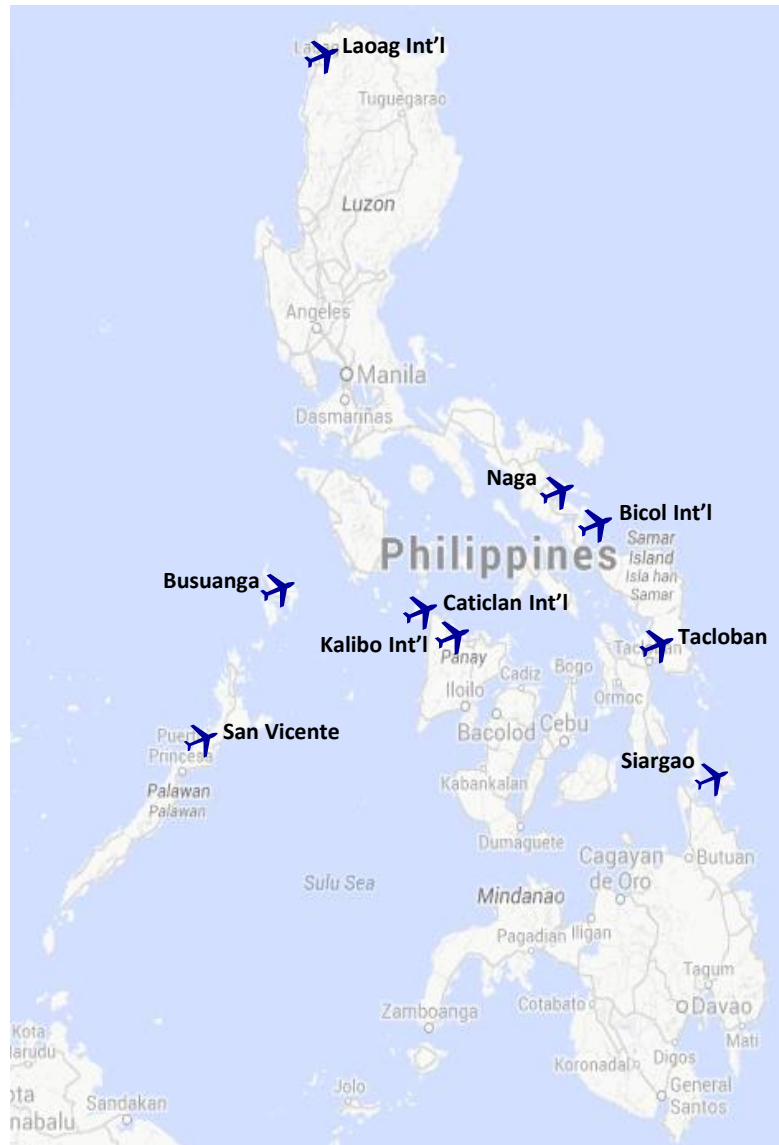
- Phase 1: USD 80.2 M (PHP 3.610 B)
- Total development cost: USD 450.2 M (PHP 20.26 B)
- Development, operations & maintenance
- Maximum concession period of 35 years
- Includes expansion of passenger and cargo terminal buildings, runway, apron, and other facilities



Status: For approvals



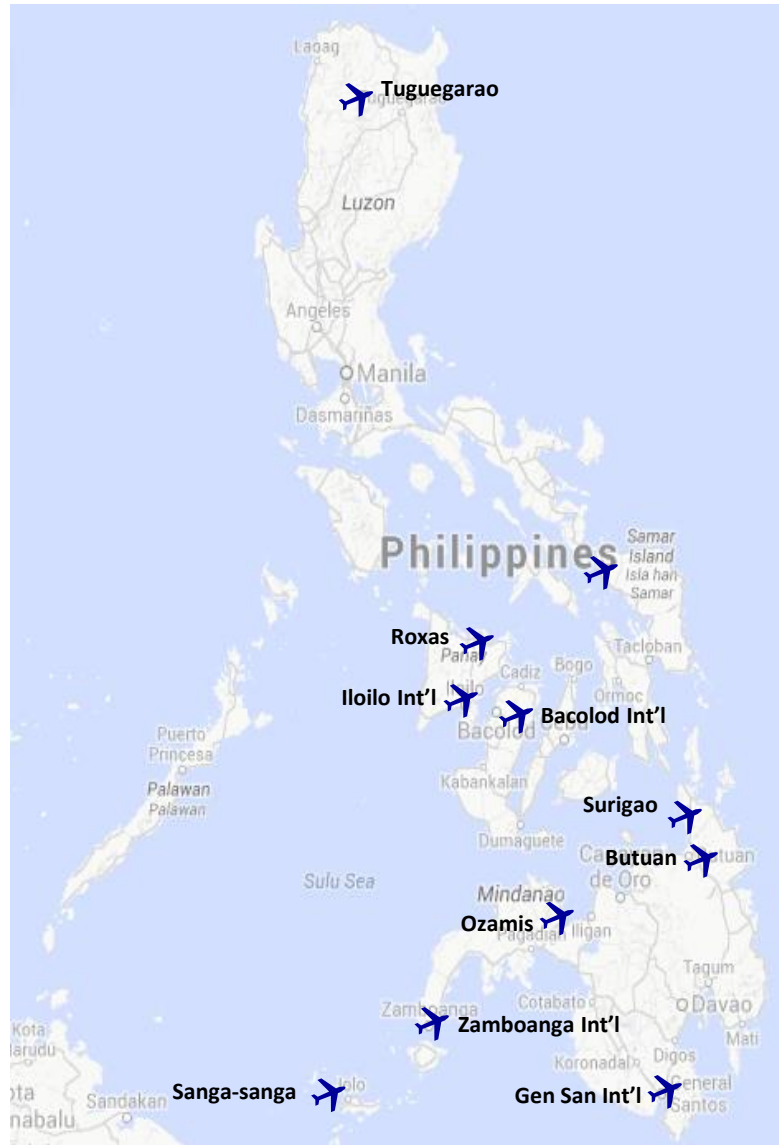
OTHER KEY TOURISM AIRPORTS



AIRPORTS FOR EXPANSION AND MODERNIZATION	COST (PHP B)	COST (USD M)
Kalibo International	2	44.4
Bicol International	6.61	146.9
Busuanga	4.46	99.1
Naga	2.257	50.2
Tacloban	4	88.9
Caticlan	3.46	76.9
San Vicente	0.9	20
Siargao	0.2	4.4
Laoag International	0.011	0.3
TOTAL	23.898	531.1



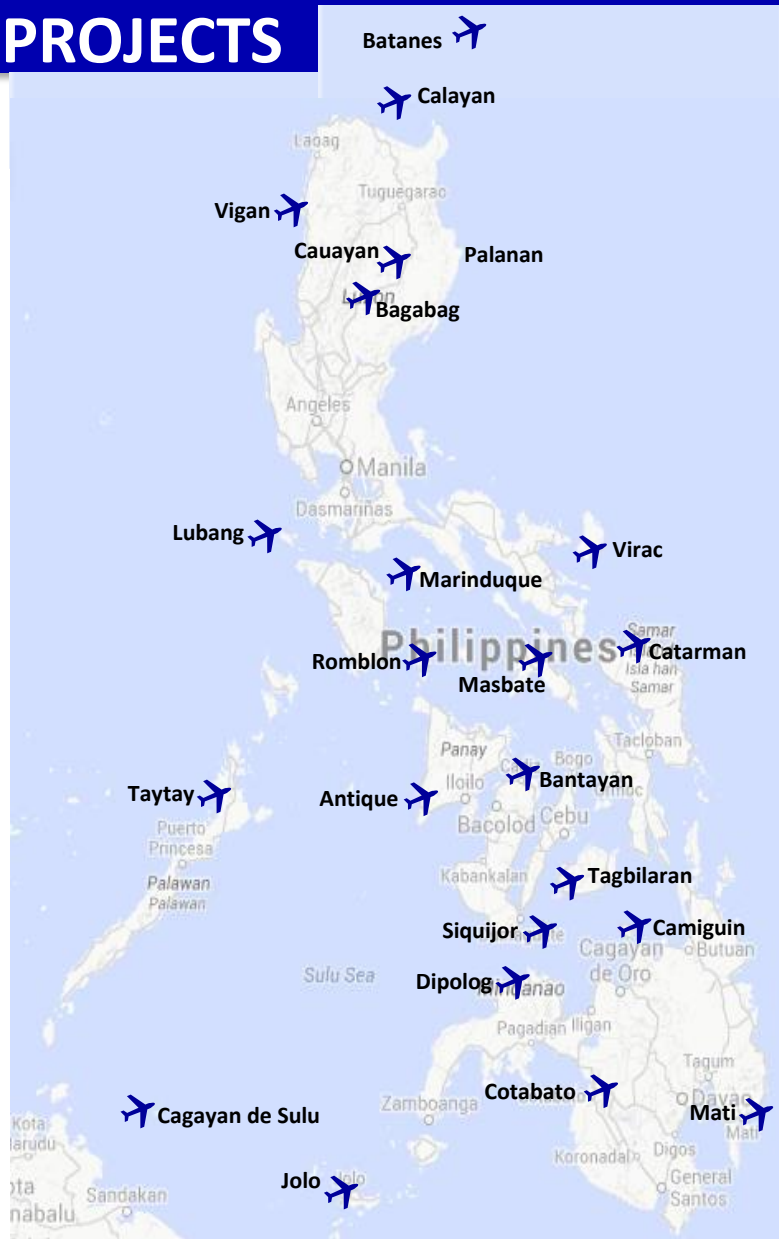
OTHER KEY SECONDARY AIRPORTS



AIRPORTS FOR EXPANSION AND MODERNIZATION	COST (PHP B)	COST (USD M)
Surigao	2	44.4
General Santos	1	22.2
Tuguegarao	1	22.2
Calbayog	0.8	17.8
Ozamis	0.7	15.6
Roxas	0.435	9.7
Butuan	0.435	9.7
Sanga-Sanga	0.248	5.5
Zamboanga International	0.05	1.1
TOTAL	6.668	148.2



OTHER AIRPORT PROJECTS



Dipolog Airport
 Cotabato Airport
 Antique Airport
 Bantayan Airport
 Batanes Airport
 Calayan Airport
 Masbate Airport
 Marinduque Airport
 Siquijor Airport
 Vigan Airport
 Lubang Airport
 Jolo Airport

Bagabag Airport
 Cauayan Airport
 Palanan Airport
 Taytay Airport
 Romblon Airport
 Virac Airport
 Catarman Airport
 Camiguin Airport
 Mati Airport
 Cagayan de Sulu Airport
 Tagbilaran Airport

Estimated Cost: USD 44.4 M (PHP 2.0 B)



OTHER PPP PROJECTS

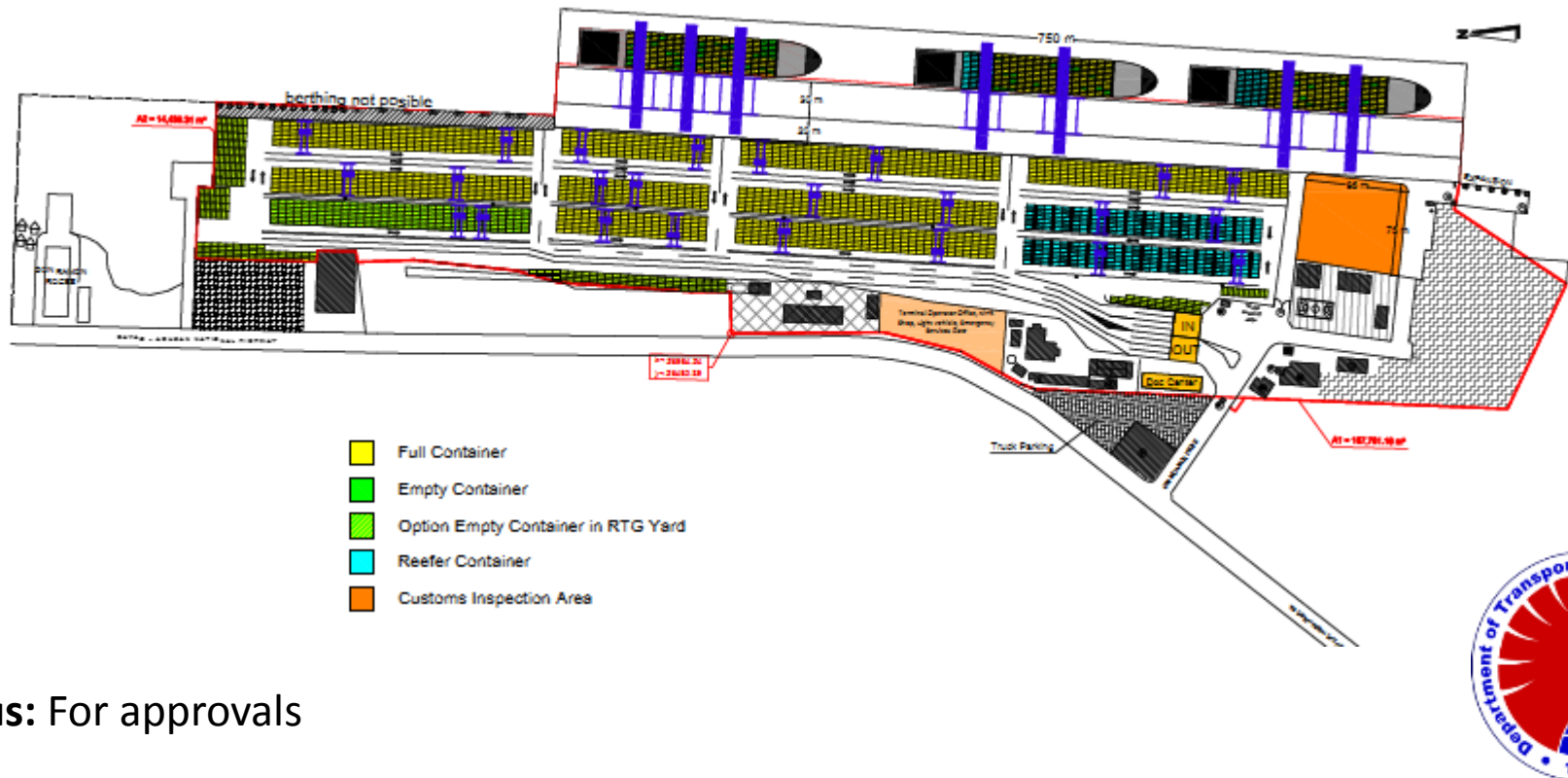
- Davao Sasa Port ***USD 388 M***
- Motor Vehicle Inspection System (MVIS) ***USD 438.6 M***

Total USD 826.6 M



DAVAO SASA PORT

- USD 388 M (PHP 17.46 B)
- Development and modernization of the Davao Sasa Port
- Construction of port infrastructure, including a new apron, linear quay, back-up area expansion, container yards, warehouses, and the installation of new equipment like ship-to-shore cranes and rubber-tyred gantry cranes



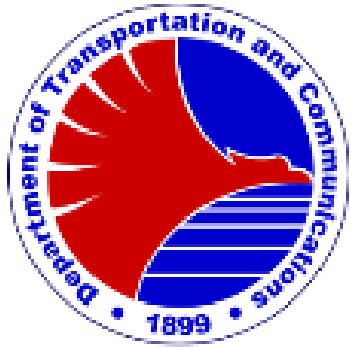
Status: For approvals

MOTOR VEHICLE INSPECTION SYSTEM

- USD 438.6 M (PHP 19.3 B)
- Setting up of motor vehicle inspection centers (MVICs) throughout the Philippines
- Includes vehicle lanes with standalone structure and modern automated inspection equipment, parking area, test driving lanes, and an IT system for automating the entire process, enforcing sufficient security measures and providing interface with the Land Transportation Office (LTO) database



Status: For approvals



THANK YOU.

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