



Department of Transportation

Philippine Economic Briefing

Navigating PH's Investment Landscape: Where to Invest?

27 May 2024 | Philippine International Convention Center

JAIME J. BAUTISTA

DOTr Secretary

Where are we

TOURISM

75th

OUT OF 117 COUNTRIES
based on
2021 TRAVEL & TOURISM INDEX¹

Tourism Share to GDP
(2022, PHP 1.38T)

6.2%

The Philippines got a score of **3.7**, lagging behind neighboring countries (**Indonesia at 4.4**, **Thailand at 4.3**, **Malaysia at 4.3**)

ROAD SAFETY

4.1%

Cost of road crash fatalities and injuries as % to GDP³

Road crash fatalities and serious injuries cost **~PHP 620.5 BILLION**

URBAN MOBILITY READINESS

58th

OUT OF 60 COUNTRIES
based on 2021 **URBAN MOBILITY READINESS INDEX⁴**

Manila got a score of **31.2%**, lagging behind neighboring cities (**Kuala Lumpur at 45.1%**, **Jakarta at 39.9%**)

OLIVER WYMAN FORUM **Berkeley**
UNIVERSITY OF CALIFORNIA

ENVIRONMENTAL

MOST VULNERABLE TO DISASTER RISK

out of **193** countries based on **2022 WORLD RISK INDEX⁵**

CLIMATE PROJECTIONS



1.8"-2.2"°C increase in temperatures by 2050



Wetter wet season, drier dry season



Increased incidence of extreme weather and hazard events



0.48-0.65 m rise in sea levels by 2100

KEY CLIMATE IMPACTS

Agriculture

Crop loss/failure; soil erosion
Increased pest infestations
Rising food prices & food imports



Water

Water shortages
Degraded water quality
Increased flood & landslide risk



Energy

Reduced energy production potential
Increased demand for energy services



Coastal Ecosystems

Loss of coastal defense, marine habitat & biodiversity
Reduced fish populations



Infrastructure/Services

Damage to roads, bridges, and water and sanitation facilities



Human Health

Loss of life and livelihoods
Increased risk of vector-/waterborne disease and population displacement



PHP 43.85 BILLION

ANNUAL (2014) ECONOMIC LOSS DUE TO PORT CONGESTION⁶

~21,925

Modern PUJs (@PHP 2M per unit)

~175,400

14ft. Fiberglass hull boats (@PHP 250K per unit)

LOGISTICS

LOGISTICS COST BY COMPONENT

27.16%

of sales as of 2018

2.47%

Logistics Administration

8.78%

Inventory Carrying

5.20%

Warehousing

10.71%

Transport

Higher than neighboring ASEAN countries:

Indonesia (21.4%), **Vietnam (16.3%)**, and **Thailand (11.11%)⁷**

LOGISTICS PERFORMANCE

out of **139** countries based on

2023 LOGISTICS PERFORMANCE INDEX

with a World Bank Logistics Performance Index (LPI) of **3.3** (from **2.9** in 2018, 1=Low, 5=High)⁸

60th
(2018 LPI)

43rd

[1] Travel & Tourism Development Index 2021: Rebuilding for a Sustainable and Resilient Future Insight Report. World Economic Forum. May 2022.

[2] Roadmap for Transport Infrastructure Development for GCR (JICA 2019)

[3] Philippines's Road Safety Country Profile (World Bank - Global Road Safety Facility 2016)

[4] Urban Mobility Readiness Index 2022 Report. Oliver Wyman Forum and University of California, Berkeley.

[5] WorldRiskReport 2022 - Focus: Digitalization. <https://reliefweb.int/report/world/worldriskreport-2022-focus-digitalization>.

[6] Philippine Institute of Development Studies (PIDS 2014)

[7] An Assessment of Logistics Performance of Manufacturing Firms in the Philippines (DTI and IFC (WB) 2018)

[8] World Bank Logistics Performance Index (<https://lpi.worldbank.org/international/global>)

Vision, Mandate and Governing Policies

"We will transform the Philippine transport industry and elevate it to global standards."

Our mantra then shall be **COMFORTABLE, ACCESSIBLE, SAFE, and AFFORDABLE** transport service throughout the country."

Jaime J. Bautista
Secretary of Transportation



"We must keep the momentum. And aspire to
BUILD BETTER MORE."

President Ferdinand
"Bongbong" Marcos,
Jr. during his July
2022 SONA

8-POINT SOCIOECONOMIC AGENDA

of the Marcos Administration

NEAR-TERM

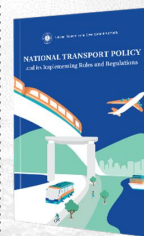
Protecting Purchasing Power and Mitigating Socio-economic Scarring

- | | | | |
|---------------------------------------|---|--|----------------------------------|
| 1 ENSURE FOOD SECURITY | 2 REDUCE TRANSPORT AND LOGISTICS COSTS | 3 REDUCE ENERGY COST TO FAMILIES | 4 TACKLE HEALTH |
| 5 STRENGTHEN SOCIAL PROTECTION | 6 ADDRESS LEARNING LOSSES | 7 ENHANCE BUREAUCRATIC EFFICIENCY | 8 SOUND FISCAL MANAGEMENT |

MEDIUM-TERM

Creating More Jobs, Quality Jobs, Green Jobs

- | | | | |
|--|---------------------------------------|--|--|
| 1 PROMOTE INVESTMENTS | 2 IMPROVE INFRASTRUCTURE | 3 ENSURE ENERGY SECURITY | 4 INCREASE EMPLOYABILITY |
| 5 EXPAND & IMPROVE DIGITAL INFRASTRUCTURE | 6 ENCOURAGE R&D AND INNOVATION | 7 PURSUE A GREEN AND BLUE ECONOMY | 8 ESTABLISH LIVABLE & SUSTAINABLE COMMUNITIES |



NATIONAL TRANSPORT POLICY

TRANSPORT VISION

*"safe, secure, reliable, efficient, integrated, intermodal, affordable, cost-effective, **environmentally sustainable**, and people-oriented national transport system that ensures improved quality of life of the people".*

PHILIPPINE DEVELOPMENT PLAN 2023-2028

CHAPTER 12

SUSTAINABLE RESILIENT, INTEGRATED, AND MODERNIZED INFRASTRUCTURE FACILITIES AND SERVICES DELIVERED

Seamless and inclusive connectivity via local and international linkages achieved

A National Transportation Master Plan will be formulated and adopted.

Intermodal transport facilities will be constructed and upgraded to achieve seamless connectivity.

Active transport networks will be developed.

Applicable **mass transportation systems** (i.e., railways, road-based, and ferry systems) will be developed in metropolitan areas.

The **nautical highway** will be improved.

Existing **airports** will be improved and new ones will be strategically developed to address future demand.

Cargo and freight rail infrastructure to connect strategic infrastructure such as ports will be developed and expanded.

Cold chain logistics and management facilities will be developed.

The implementation of the **Unified Logistics Pass (ULP) and Transport Accreditation, Permit and Pass for Ports (TAPPP)** will be made seamless and well-integrated.

Transport safety and security will be ensured.

Gender mainstreaming, inclusion, and accessibility will be main considerations in all stages of transport project implementation.

DOTr will bridge the gap towards our vision for the transportation sector

Pursuant to the marching orders of the President, DOTr will bridge the gap from where we are now towards the vision for the transportation sector where transportation services are **accessible, affordable, comfortable, safe and efficient** through DOTr's four transportation sectors...



DOTr will BUILD BETTER and BUILD MORE by...

2016-2022

2022-2028

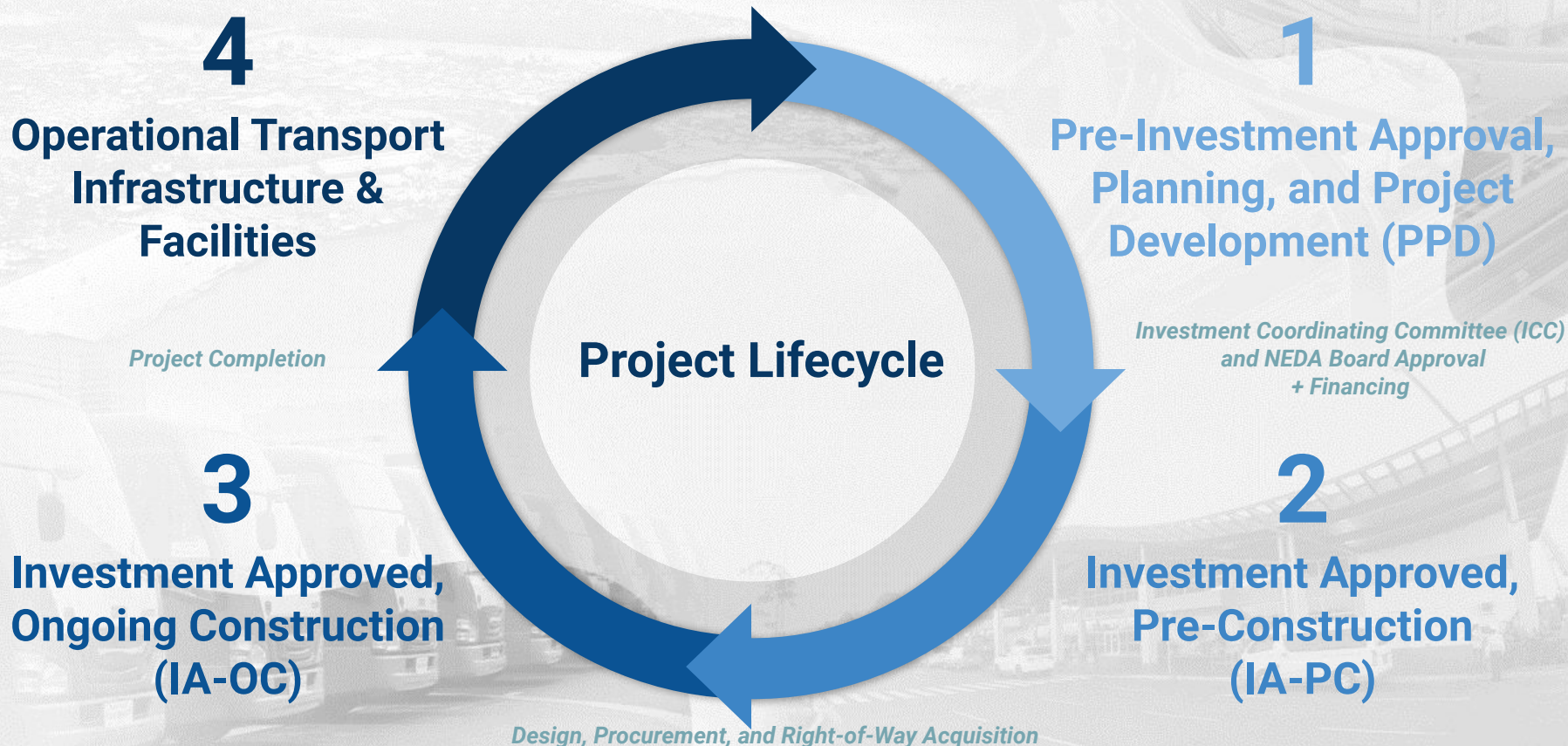
2028 AND BEYOND

Continuing and finishing projects from
the **previous administration**

Starting and finishing projects by
the **current administration**

Starting and passing projects to
the **next administration**

Pushing projects through the project lifecycle



Pushing projects through the project lifecycle

4 Operational Transport Infrastructure & Facilities

Aviation

- 8 International Airports (4 CAAP)
- 41 Community Airports (CAAP)
- 20 Principal Class 1 Airports (CAAP)
- 19 Principal Class 2 Airports (CAAP)
- 203 Private Airstrips

3 Investment Approved, Ongoing Construction (IA-OC)*

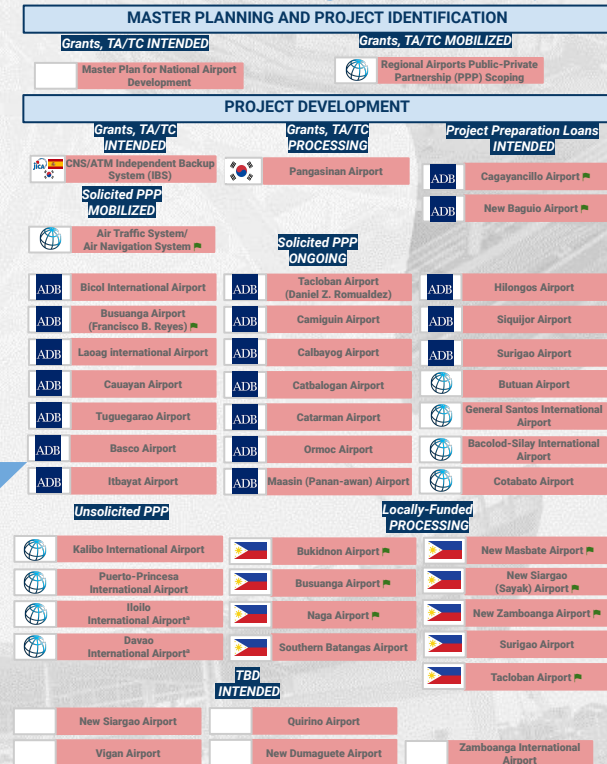
	New Manila International Airport
	CNS/ATM Project
	Various Airport CapEx and Rehabilitation Projects

5 Thematic Initiatives




- 5.1. Lowering of Logistics Cost
- 5.2. Tourism
- 5.3. Transport Jobs Creation and Security
- 5.4. Industry Development
- 5.5. TOD
- 5.6. Transport Safety
- 5.7. Transport Security Program
- 5.8. ESG Considerations
- 5.9. Carbon Neutrality
- 5.10. Disaster Resilience
- 5.11. ROWSA
- 5.12. GEDSI
- 5.13. Institutional Strengthening & Rightsizing
- 5.14. Decoupling of Regulation-Operation
- 5.15. Digitalization
- 5.16. Automated Fare Collection
- 5.17. Electric Vehicles
- 5.18. PCG Modernization
- 5.19. Construction Safety
- 5.20. Fare Affordability

Aviation Sector Pipeline

1 Pre-Investment Approval, Planning, and Proj. Dev't. (PPD)*



2 Investment Approved, Pre-Construction (IA-PC)*

	NAIA Modernization Project		Laguindingan Airport*		Bohol-Panglao International Airport*
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Infrastructure Flagship Project (IFP)

Non-exhaustive projects list

*IA-OC / IA-PC projects may revert to PPD due to cost increase, change in scope, and/or updating of implementation timeline.

Pushing projects through the project lifecycle

4 Operational Transport Infrastructure & Facilities

879 PPA Ports
 - 115 Base Port and Terminal Ports
 - 361 Other Government Ports
 - 402 Private Ports
 151 CPA Ports
 1313 LGU Ports
 7 Ports under other Port Management Bodies

3 Investment Approved, Ongoing Construction (IA-OC)*



5 Thematic Initiatives

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Maritime Sector Pipeline

1 Pre-Investment Approval, Planning, and Proj. Dev't. (PPD)*

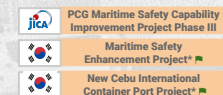
MASTER PLANNING AND PROJECT IDENTIFICATION



PROJECT DEVELOPMENT



2 Investment Approved, Pre-Construction (IA-PC)*



Infrastructure Flagship Project (IFP)

Non-exhaustive projects list

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Pushing projects through the project lifecycle

4 Operational Transport Infrastructure & Facilities

- 77 (+1,132¹) km length of railways²
- 61 (+147¹) Stations
- 224 (+1,162¹) Train Cars

¹ Investment approved, financed, awarded, and/or ongoing construction.

² Operational railways include LRT-1, LRT-2, MRT-3, and PNR.

3 Investment Approved, Ongoing Construction (IA-OC)*



5 Thematic Initiatives

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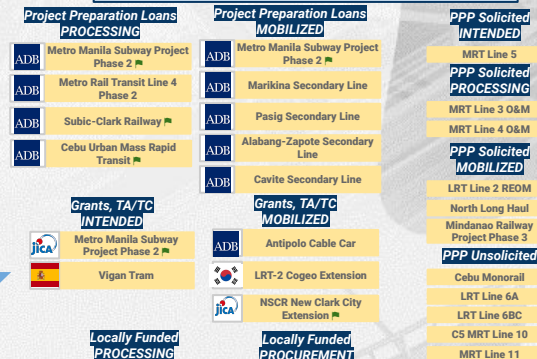
Railways Sector Pipeline

1 Pre-Investment Approval, Planning, and Proj. Dev't. (PPD)*

MASTER PLANNING AND PROJECT IDENTIFICATION

ADB JICA 30-Year Railway Master Plan for the Greater Capital Region

PROJECT DEVELOPMENT



INVESTMENT EVALUATION

For Submission

Metro Manila Subway Project O&M, North-South Commuter Railway System O&M

For Reapproval/Restructuring

MRT Line 4, MRT Line 7, Subic-Clark Railway, LRT-2 East Extension

2 Investment Approved, Pre-Construction (IA-PC)*

LRT Line 2 West Extension, PNR South Long Haul, Mindanao Railway Phase 1, MRT Line 4, Subic-Clark Railway

Infrastructure Flagship Project (IFP)

Non-exhaustive projects list

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Pushing projects through the project lifecycle

4 Operational Transport Infrastructure & Facilities

5,879 Operating MPUJs
51 Operating Modern Minibus
1,046 Operating MPUBs
5.77M Registered Vehicles
132 Approved LPTRPs
564 km of bike lanes

3 Investment Approved, Ongoing Construction (IA-OC)*

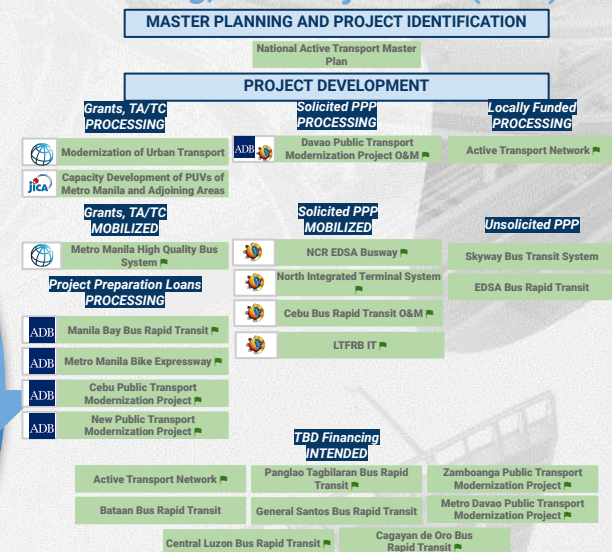
EDSA Busway
LTO Infrastructure and Information System
Active Transport

5 Thematic Initiatives

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Road Sector Pipeline

1 Pre-Investment Approval, Planning, and Proj. Dev't. (PPD)*



2 Investment Approved, Pre-Construction (IA-PC)*



Infrastructure Flagship Project (IFP)

Non-exhaustive projects list

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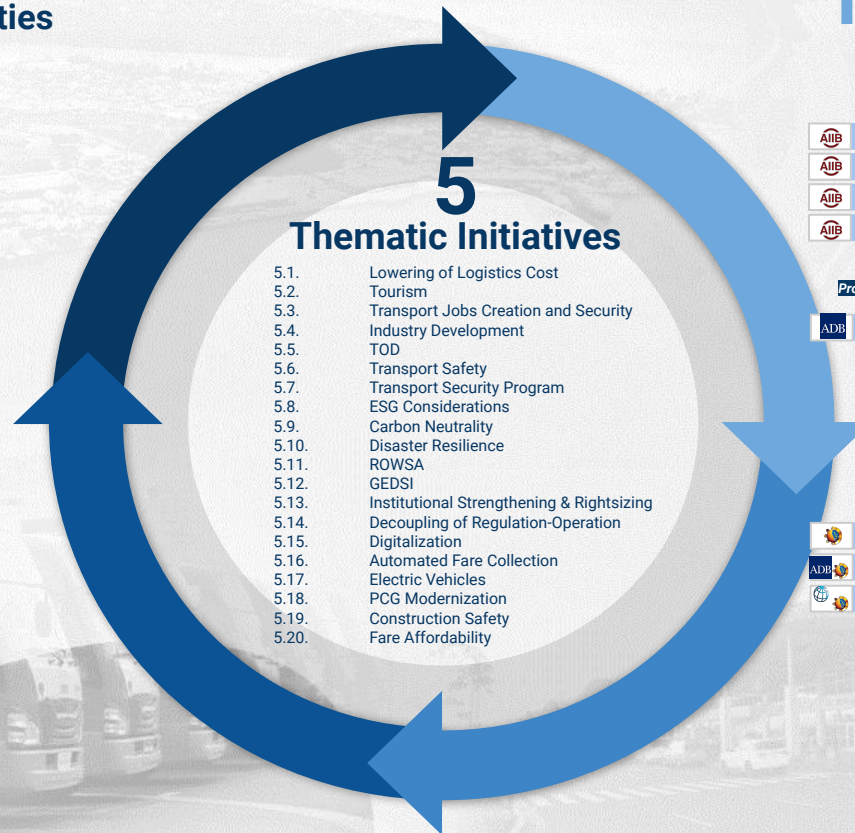
Pushing projects through the project lifecycle

Multi-Sector Pipeline

4 Operational Transport Infrastructure & Facilities

3 Investment Approved, Ongoing Construction (IA-OC)*

1 Pre-Investment Approval, Planning, and Proj. Dev't. (PPD)*



MASTER PLANNING AND PROJECT IDENTIFICATION

Upstream Loans INTENDED		
Philippine Transport System Master Plan	Vigan City Master Plan	Metro Iloilo Master Plan
Puerto Princesa City Master Plan	Surigao City Master Plan	Metro Pampanga Master Plan
Tacloban City Master Plan	Metro Iloilo Master Plan	Metro Cagayan de Oro Master Plan
Metro Bacolod Master Plan	Cebu Regional Master Plan	Zamboanga Regional Master Plan
Panay Regional Master Plan	Roadmap for Philippines to become Logistics Hub in Asia	

Project Preparation Loans MOBILIZED		
30-Year Transport Master Plan for the Greater Capital Region	Philippine National Intelligent Transport System Master Plan	Metro Cebu Intelligent Transport System

Locally Funded PROCESSING	
Metro Cagayan de Oro Public Transport Pre-Investment Study	Metro Zamboanga Public Transport Pre-Investment Study
Bohol Public Transport Pre-Investment Study	Metro La Union Public Transport Pre-Investment Study

PROJECT DEVELOPMENT

Solicited PPP INTENDED		
National Transportation Database	DOTR Headquarters Building	North-South Commuter Railway In-Fill Stations
Transit Oriented Development Project on Dep-Ed-Senate Area	Philippine Automated Fare Collection System	
Transit Oriented Development Project with World Bank		

2 Investment Approved, Pre-Construction (IA-PC)*

Infrastructure Flagship Project (IFP)

Non-exhaustive projects list

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IFPs Across the Project Lifecycle

4 Operational Transport Infrastructure & Facilities

3 Investment Approved, Ongoing Construction (IA-OC)*

Unsolicited PPP	Project Implementation Loan
<input type="checkbox"/> New Manila International Airport (Bulacan International Airport)	<input type="checkbox"/> Metro Manila Subway Project Phase 1
<input type="checkbox"/> MRT 7 Project	<input type="checkbox"/> MRT-3 Rehabilitation and Maintenance
	<input type="checkbox"/> North-South Commuter Railway System
Hybrid PPP-ODA	
<input type="checkbox"/> LRT Line 1 Cavite Extension	

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IFP Pipeline

1 Pre-Investment Approval, Planning, and Proj. Dev't. (PPD)*

Locally-Funded	Solicited PPP	Grants/TA/TC
<input type="checkbox"/> New Zamboanga Airport	<input type="checkbox"/> Air Traffic Services - Air Navigation Services (ATS-ANS)	<input type="checkbox"/> North-South Commuter Railway System New Clark City Extension
<input type="checkbox"/> Panay Railway System	<input type="checkbox"/> Manila Bay-Pasig River-Laguna Lake Ferry System	<input type="checkbox"/> LRT Line 2 Cogo Extension
<input type="checkbox"/> Central Luzon Bus Rapid Transit	<input type="checkbox"/> LRT Line 2 Operations & Maintenance	<input type="checkbox"/> Metro Manila High Quality Bus Corridors
<input type="checkbox"/> Active Transport Network	<input type="checkbox"/> Metro Manila Subway Project Operations & Maintenance	<input type="checkbox"/> TBD
Project Preparation Loans	<input type="checkbox"/> Mindanao Railway Phase 3 (Northern Mindanao)	<input type="checkbox"/> New Masbate Airport Development Project
<input type="checkbox"/> New Baguio Airport	<input type="checkbox"/> MRT 3 Operations & Maintenance	<input type="checkbox"/> Southern Palawan Airport Development Project
<input type="checkbox"/> New Cagayanillo Airport	<input type="checkbox"/> MRT Line 4 Operations & Maintenance	<input type="checkbox"/> New Siargao Airport
<input type="checkbox"/> Farm-to-Market Ports Network Project	<input type="checkbox"/> MRT Line 5	<input type="checkbox"/> Bukidnon Airport Development Project
<input type="checkbox"/> Port Cold Chain Network Project	<input type="checkbox"/> North Long Haul Inter-Regional Railway	<input type="checkbox"/> Busuanga Airport Development Project
<input type="checkbox"/> Roll-on Roll-off (RORO) Network Upgrade Project	<input type="checkbox"/> North-South Commuter Railway System O&M	<input type="checkbox"/> Tacloban Airport Development Project
<input type="checkbox"/> Cebu Urban Mass Rapid Transit (UMRT) Central Line	<input type="checkbox"/> San Mateo Railway	<input type="checkbox"/> Naga Airport Development Project
<input type="checkbox"/> Metro Manila Subway Project Phase 2	<input type="checkbox"/> Cebu Bus Rapid Transit Operations & Maintenance	<input type="checkbox"/> Laoag International Airport Development Project
<input type="checkbox"/> Subic-Clark-Manila-Batangas Railway Project	<input type="checkbox"/> Davao PTMP Operations & Maintenance	<input type="checkbox"/> Panglao-Tagbilaran Bus Rapid Transit
<input type="checkbox"/> Cebu Public Transport Modernization Project	<input type="checkbox"/> EDSA Busway (Improved)	<input type="checkbox"/> Zamboanga Public Transport Modernization Project
<input type="checkbox"/> Manila Bay Bus Rapid Transit	<input type="checkbox"/> North NCR Intermodal Transit Interchange	<input type="checkbox"/> Cagayan de Oro Bus Rapid Transit
<input type="checkbox"/> Metro Manila Bike Expressway Project	<input type="checkbox"/> Philippine Automated Fare Collection System	<input type="checkbox"/> Metro Davao Public Transport Modernization Project
<input type="checkbox"/> New Modern Public Utility Vehicle Service Contracting Program	<input type="checkbox"/> National Transportation Database	

2 Investment Approved, Pre-Construction (IA-PC)*

Solicited PPP	Project Implementation Loan	Locally-Funded
<input type="checkbox"/> Ninoy Aquino International Airport PPP Project	<input type="checkbox"/> New Dumaguete Airport Development Project	<input type="checkbox"/> MRT Line 4
<input type="checkbox"/> Taguig City Integrated Terminal Exchange	<input type="checkbox"/> Maritime Safety Enhancement Project	<input type="checkbox"/> PNR South Long Haul
Unsolicited PPP	<input type="checkbox"/> New Cebu International Container Port Project	<input type="checkbox"/> Cebu Bus Rapid Transit
<input type="checkbox"/> Bohol-Panglao International Airport	<input type="checkbox"/> Mindanao Railway Project Phase 1 (Tagum-Davao-Digos)	<input type="checkbox"/> Davao Public Transport Modernization Project
<input type="checkbox"/> Laguindingan International Airport Project	<input type="checkbox"/> EDSA Greenways Phase 1	

TRANSPORTATION MODERNIZATION PROGRAM

"We will transform the Philippine transport industry and elevate it to global standards.

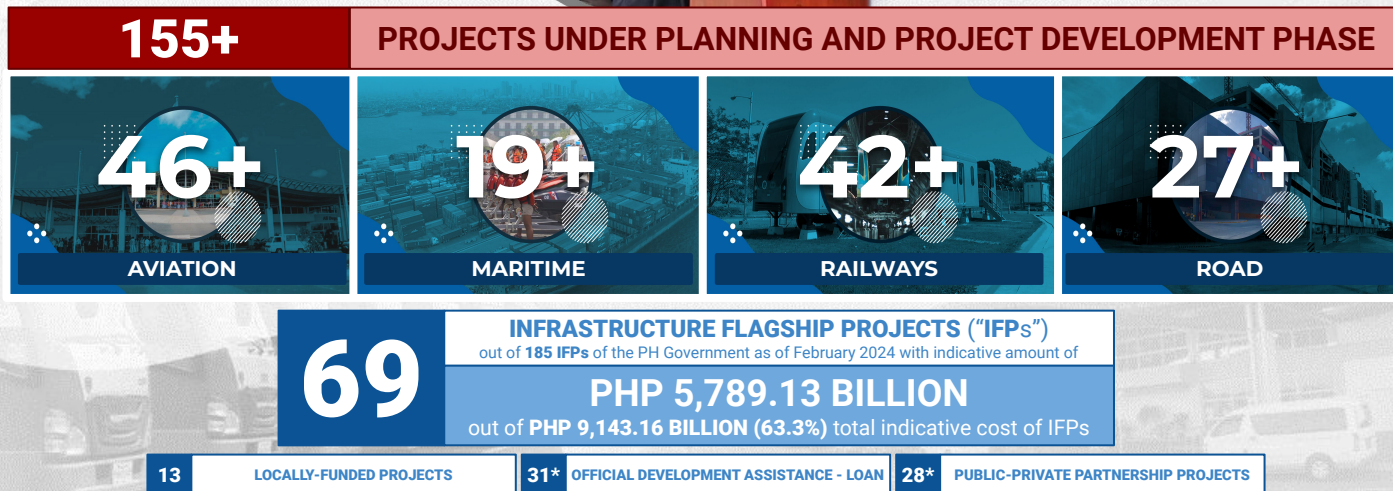
Our mantra then shall be ACCESSIBLE, AFFORDABLE, COMFORTABLE and SAFE transport service throughout the country."

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Secretary of Transportation



"We must keep the momentum. And aspire to
BUILD BETTER MORE."

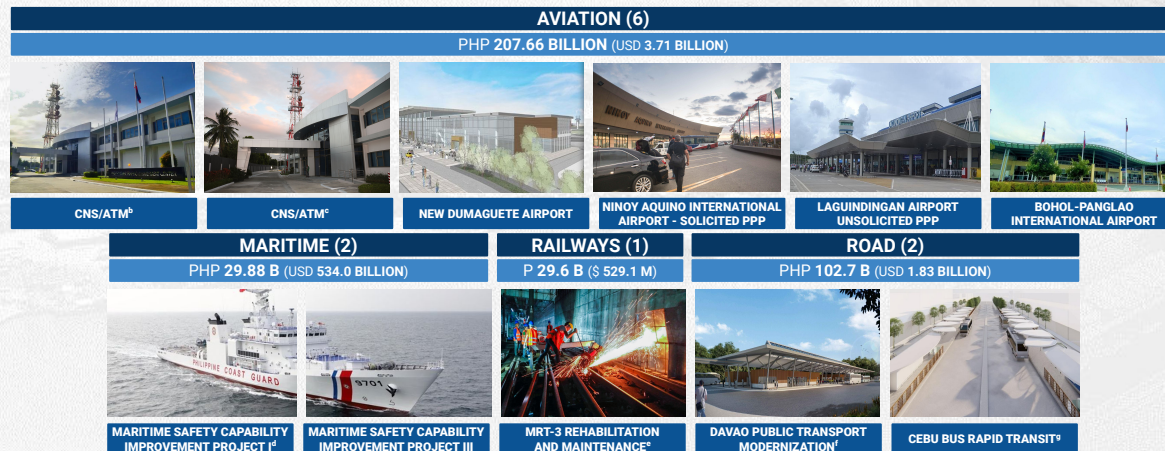
President Ferdinand "Bongbong" Marcos, Jr. during his July 2022 SONA



TRANSPORTATION MODERNIZATION PROGRAM

11

INVESTMENT-APPROVED PROJECTS^a AMOUNTING TO PHP **369.3 BILLION** FROM NOVEMBER 2022 TO DATE



DOTr as the **largest MEGA PROJECT** and **BIG CONTRACTS MANAGER** in the PHILIPPINES

57

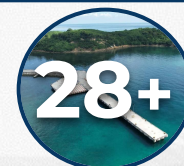
AWARDED RAIL CONTRACTS
With PHP 21 BILLION
Average Original Contract Amount

PHP 1,200 BILLION
TOTAL AMOUNT OF CONTRACTS AWARDED

COMPLETED PROJECTS FROM JULY 2022 TO DATE



AIRPORTS



PORTS

PHP 896 BILLION
(USD 16.151 BILLION)

TOTAL APPROVED PROJECT LOANS

29+

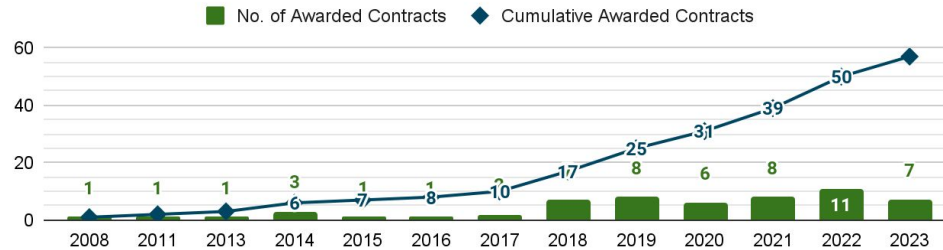
UPCOMING AND ONGOING FOREIGN-ASSISTED PROJECT CONTRACT PACKAGES AMOUNTING TO
PHP 176.22 BILLION

[a] NEDA-Approved TPC, except for MSC/PI and CNS/ATM, which only cover loan balance approved for utilization; [b] 19-month loan validity extension; [c] utilization of the JICA Loan Balance for CNS/ATM Maintenance and Resiliency Enhancement, with the following three (3) components: one, Maintenance Contracts; two, an Ultimate Fallback System for the current system; and three, a Feasibility Study for an Independent Backup System; and a corresponding 60-month Loan Validity Extension from June 2023 to June 2028, to cover the intended period for the Maintenance Contracts to be put in place; [d] Request for utilization of savings for the requested change in scope, and loan validity extension; [e] Request for change in scope, increase in project cost, extension of implementation period, additional loan, and second loan reallocation; [f] Request for change in scope, increase in cost, and extension of implementation period; [g] Proposed Change in Scope, Increase in Cost, and Extension of Implementation Period and Loan Validity

DOTr is currently the largest MEGA PROJECT and BIG CONTRACTS manager in the PHL

RAIL CONTRACTS AWARDED

NUMBER OF AWARDED CONTRACTS



TOTAL AMOUNT OF CONTRACTS AWARDED in PHP billions



Original contract amounts

~PHP 9B

Average Original Contract
Amount of Awarded
Contracts as of Dec 2016

~PHP 21.7B

Average Original Contract
Amount of Awarded
Contracts as of Apr 2024

Overall Market Responsiveness:

57 Contract Packages

166 Bids

137 Companies

15 Participating Countries

How RESPONSIVE has the market been so far?

Record-breaking participation
of bidders in NSCR Civil Works
Procurement:

20 Contract Packages

64 Bids

31 Companies

10 Participating Countries













Philippines, South Korea, Indonesia,
Turkey, HK SAR, Spain, China, Italy,
Thailand, Japan

CONTRACTING STRATEGIES

**BIG CONTRACTS, MOSTLY
FIDIC**

**TRANSPARENT, EFFICIENT
PROCUREMENTS**

Foreign Assisted Projects (FAPs) Contract Packages (CPs) Procurement Pipeline

	UPCOMING	ONGOING		
		PRE-BID SUBMISSION	POST-BID SUBMISSION	WITH PS-DBM
	20 CPs PHP 61.8 BILLION	1 CP PHP 0.48 BILLION	7 CPs PHP 109.8 BILLION	1 CP PHP 0.29 BILLION
AVIATION	 DGT-CS DGT-DB			
MARITIME	  MSEP-CS MSEP-CW MSCIP1-CS MSEP-2BTV MSCIP1-SBCE MSCIP3-CS MSCIP3-SMRRVs For MSEP: Rombon Buoy Base Civil Works 2BTV Buoy Tender Vessels (2x) For MSCIP1: Secure Shore-Based Communications Equipment For MSCIP3: Consultancy Service SMRRVs 5 Multi-Role Response Vessels CS Secure Shore-Based Communications Equipment SBCE Secure Shore-Based Communications Equipment		 NCICP-CW	
RAILWAYS			 MMSP-CP105 MMSP-CP108 MMSP-CP109 CP105 Kalayaan and Bonifacio Global City (BGC) Stations and Tunnel Works CP108 Lawton Station and Senate-Deped Station and Tunnel Works CP109 Ninoy Aquino International Airport (NAIA) Terminal 3 Underground Station and Tunnel Works	
ROAD	   DPTMP-CP07 EGP-CP1 CBRT-P2&P3 DPTMP-CP08 EGP-CP2 CBRT-P4 DPTMP-CP11 EGP-CS CBRT-ATC/ITS DPTMP-CP12 For DPTMP: CP07 System Integrator - ITS CP08 System Integrator - AFCS CP11 External Evaluation and Monitoring CP12 Communications For EGP: CP1 Design & Build (Balintawak & Cubao) CP2 Design & Build (Quadruplex & Taft) CS Construction Supervision Consultant For CBRT: P2&P3 RP to N Bacalso and Capitol - IT Park and Feeder Line P4 Bulacao-Mambaling Trunk Section ATC/ITS Advanced Transportation Controller/Intelligent Transportation Systems PIE-AF2 Various Consultancy Contracts	 DPTMP-CP10 System Administrator	 DPTMP-CP05 DPTMP-CP06 DPTMP-CP09 CP05 Bus Fleets - Diesel CP06 Bus Fleets - EV CP09 General Consultant	  CBRT-TSC3 ² For CBRT: TSC3 Technical Support Consultant 3

LEGEND:

RED	Consultancy
YELLOW	Civil Works
GREEN	Goods

PROJECT CODES:

Aviation	
DGT	New Dumaguete Airport Development Project

Maritime	Maritime Safety Capability Improvement Project Phase I
MSEP	Maritime Safety Enhancement Project
NCICP	New Cebu International Container Port Project

Rail	
MMSP	Metro Manila Subway Project

Road	
CBRT	Cebu Bus Rapid Transit
DPTMP	Davao Public Transport Modernization Project
EGP	EDSA Greenways Project

CONTRACT CODES:

CS	Consultancy Service	CP / P	Contract Package
CW	Civil Works	DB	Design-Build

SUMMARY




ACCORDING TO PROCUREMENT STATUS

Upcoming	20
Ongoing; Pre-Bid Submission	1
Ongoing; Post-Bid Submission	7
Ongoing; with PS-DBM	1

ACCORDING TO CONTRACT TYPE

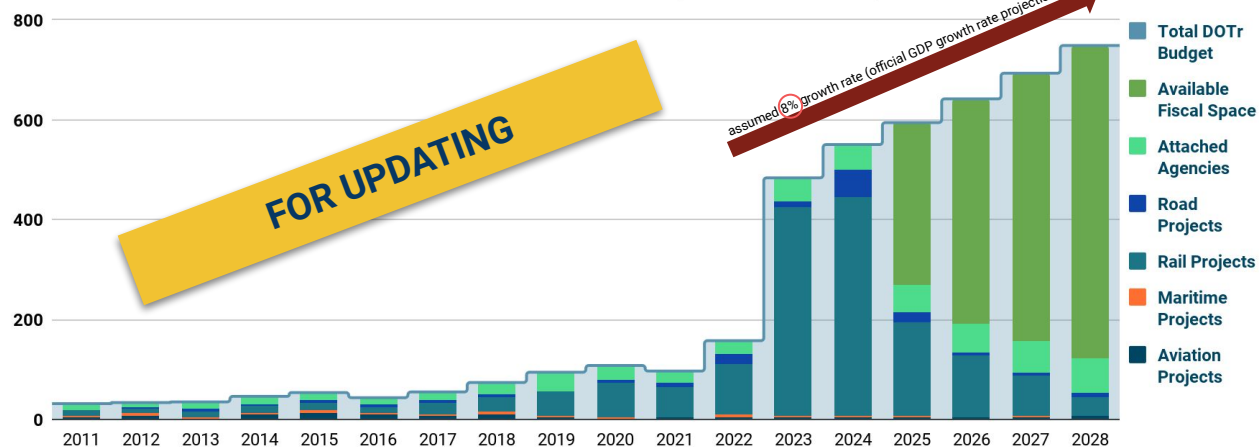
Consultancy	10	PHP 51.6 B
Civil Works	10	PHP 113.4 B
Goods	8	PHP 53.4 B

ACCORDING TO DEVELOPMENT PARTNER

	16	PHP 42 B
	7	PHP 97.2 B
	6	PHP 25.8 B
 	4	PHP 6.6 B

While **near-term fiscal space is occupied** by ongoing Rail Projects, projected **uncommitted fiscal space after peak rail disbursement** is **EUR 32.26 BILLION**

DOTr Appropriations (in Billions PHP)



Projected Estimated Uncommitted Fiscal Space (in Billions)

2025	2026	2027	2028	TOTAL
P325	P449	P536	P626	P1,936
TOTAL ESTIMATED UNCOMMITTED FISCAL SPACE				

¹ 2024-2028 Projections for Aviation, Maritime, and Rail are based on an **8% annual growth**.

² 2024-2028 Projections for Road are based on **2023 Annual Fund Requirements**.

in Billions PHP	AQUINO ADMINISTRATION						DUTERTE ADMINISTRATION						MARCOS ADMINISTRATION					
Items	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Total DOTr Budget	31.59	33.8	34.93	46.14	53.74	43.5	54.9	73.88	94.45	107.91	96.72	157.59	483.83	550.37	594.40	641.96	693.31	748.78
Aviation Projects	4.96	6.56	2.72	9.11	13.95	9.35	6.79	9.78	3.87	2.45	4.95	3.87	3.09	3.34	3.60	4.29	5.09	6.05
Maritime Projects	1.94	5.33	2.18	3.17	5.23	2.25	4.24	5.46	1.79	0.99	0.56	5.02	3.14	4.28	4.07	0.91	1.08	1.28
Rail Projects	11.75	9.7	12	14.66	15.24	12.46	22.1	28.44	49.79	68.87	57.98	102.47	419.82	437.65	186.93	121.78	80.77	38.17
Road Projects	0.35	1.98	3.31	3.77	3.99	5.18	5.07	7.02	1.91	5.67	9.12	19.51	10.94	54.50	20.58	6.83	6.83	8.32
Attached Agencies inc. Non Project Items	12.59	10.23	14.72	15.44	15.34	14.27	16.7	23.18	37.09	29.94	24.12	26.72	46.85	50.60	54.64	59.01	63.74	68.83
													Present	Projected				

DOTr will BUILD MORE by BUILDING BETTER

How are we *Building Better*?

Better Project Identification, Prioritization, and Preparation

- ✓ Gap Analysis vis-a-vis Existing Master Plans
- ✓ Updating and Development of New Master Plans
- ✓ Prioritization of Master Plan-Identified Projects
- ✓ More Robust Project Preparation

Broader and More Diversified Funding Strategy

- ✓ Diversifying Funding & Financing Partners
- ✓ Diversifying into PPP Funding
- ✓ Broadening Funding Resources

Better Project Implementation Strategies

- ✓ Continuity
- ✓ Strengthening of Institutional Capacity
- ✓ Strategic Contracting and Credible Procurement
- ✓ Environmental, Social, and Governance (ESG)
- ✓ Absorptive Capacity

THINK
BIG

BIG SOLUTIONS FOR BIG PROBLEMS

DOTr will BUILD BETTER by

Better Project Identification, Prioritization, and Preparation

Broader and More Diversified Funding Strategy

Better Project Implementation Strategies



Pushing PPD projects into implementation requires Project Development resources

~PHP 1,936 BILLION

projected est. **Uncommitted Fiscal Space** in the **Medium Term**

How are we addressing this?

✓ **Diversifying ODA Partners to Access More PPD Resources**

✓ **Utilizing PPP Project Preparation Facilities**

1/10/100 RULE

MEASURE TWICE, CUT ONCE

~PHP 19.36 BILLION

needed by DOTr in the near-term for Project Preparation and Development (PPD) activities

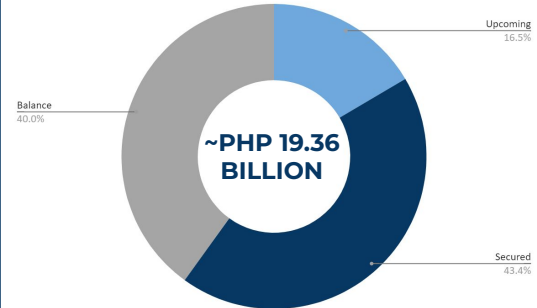
*Estimated based on average ~1% of Project Cost for DOTr and DPWH projects

PHP 0.00

DOTr FS Budget under GAA 2023

Planning and Project Development Resources (as of December 2023)

In Million PHP	Upcoming	Secured	Total
PPP	163.05	878.49	1,041.54
Loans	2,896.92	6,005.54	8,902.46
Grants	136.46	577.48	713.93
LFPs		950.00	950.00
	3,196.42	8,411.51	11,607.93



UPSTREAM AND MIDSTREAM LOAN FACILITIES

UPSTREAM PROJECT PREPARATION

✓ **MASTER PLANS**



BANK (AIIB)

Facility for Accelerating Studies for Infrastructure

USD 44.0 MILLION

MIDSTREAM PROJECT PREPARATION



FEASIBILITY STUDIES



DETAILED DESIGN



PROCUREMENT SUPPORT



ASIAN DEVELOPMENT BANK

Infrastructure Preparation and Innovation Facility

~USD 100 MILLION

OUT OF USD 200M SHARED WITH DPWH

PPP RESOURCES



WORLD BANK GROUP

International Finance Corporation (IFC)



ASIAN DEVELOPMENT BANK

Office of Public-Private Partnership (OPPP)



PPP CENTER

Project Development and Monitoring Facility

~USD 19 MILLION

LOCALLY-FUNDED



LOCALLY-FUNDED

~USD 17 MILLION

DOTr will BUILD BETTER by

Better Project Identification,
Prioritization, and Preparation

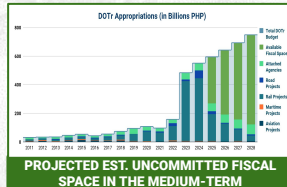
Broader and More Diversified Funding Strategy

Better Project
Implementation Strategies

PROJECT
PREPARATION

~PHP 19 BILLION

DOTr FS Fund / Project Preparation Grants / Technical Assistance / Technical Cooperation / Non-Reimbursable Facilities / Project Preparation Loans

PROJECT
IMPLEMENTATION

to fund operations and project implementation of the four transportation sectors.

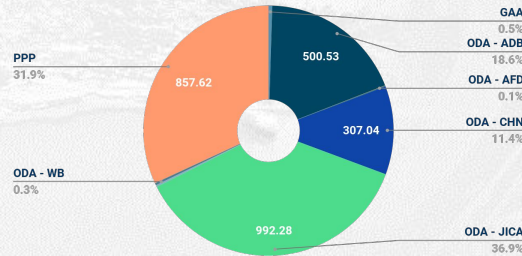


PRIVATE-FINANCED

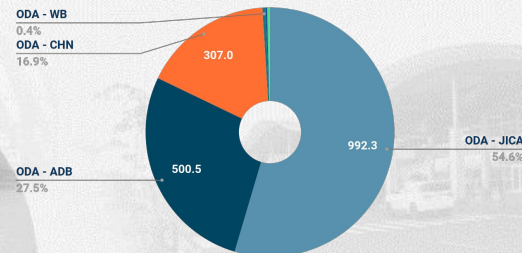


53+

Transportation PPP Projects



ODA FUNDING MIX



Projects Funding Mix (in Billions)	2022	% of Total
ODA	EUR 30.28	67.61%
PPP	EUR 14.29	31.90%
GAA	EUR 0.22	0.49%
TOTAL	EUR 44.81	100.00%



MOSTLY ODAs

ODA Funding Mix (in Billions)	2022	% of Total
JICA	EUR 16.54	54.59%
ADB	EUR 8.34	27.53%
CHN	EUR 5.12	16.89%
WB	EUR 0.13	0.43%
AFD	EUR 0.05	0.17%
KEXIM	EUR 0.10	0.34%
ADB (ASEAN-IF)	EUR 0.10	0.05%
TOTAL	EUR 30.30	100.00%



99% with 3 ODA Partners

Diversifying into PPPs; Enhancing the Enabling Environment

PPP CODE OF THE PHILIPPINES

PRESIDENTIAL DIRECTIVE



"The planned expansion of infrastructure projects, I believe, would be possible if we continue to encourage the participation of the private sector in the development of our programs."

"Public Private Partnerships or PPPs hold great potential for that expansion, for infrastructure development and for innovation."

President Ferdinand "Bongbong" Marcos Jr. during his July 2022 SONA

RA 11966: PPP Code of the Philippines

RA 11966 or the PPP Code of the Philippines took effect last 23 December 2023 to allow mobilization of private sector resources as an engine for capital and a catalyst for growth.

MORE PPP TYPES PERMITTED

Type 1

PPPs THAT DO NOT NEED FISCAL SPACE

Unlimited number of Type 1 PPPs possible, with the **only constraint** being Project Preparation bandwidth (financial and manpower).

Type 2

PPPs THAT DO NOT NEED FISCAL SPACE

Limited fiscal space constraints implementation of this type of PPPs in the near term. Type 2 PPPs where payments start after construction possible.

2022-2028 MEDIUM-TERM FISCAL FRAMEWORK (MTFF).

- ✓ Strategic Utilization of PPPs
- ✓ Encouraging Solicited PPPs to Improve Infrastructure
- ✓ Private Sector and Localized Participation in Public Investments

AMENDED PUBLIC SERVICE ACT

RA 11659: Amended Public Service Act

On March 21, 2022, President Duterte signed Republic Act No. 11659 into law. The law amends the Commonwealth Act No. 146, otherwise known as the Public Service Act (PSA), which was passed in 1936.

The Implementing Rules and Regulations (IRR) of the **AMENDED PUBLIC SERVICE ACT** took effect on **04 April 2024**

- ✓ Enabled the liberalization of key public services by allowing full foreign ownership of businesses in select industries such as **AIRPORTS, RAILWAYS, EXPRESSWAYS, and TELECOMMUNICATIONS.**

Prior to this, foreign ownership in these industries was limited to 40%. The amendments also **provide safeguard provisions protecting the country against national security concerns** that may arise from proposed mergers, acquisition, or any investment in a public service.

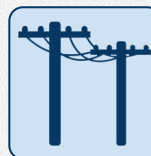
NEW SUBCLASSIFICATIONS OF PUBLIC SERVICES

CRITICAL INFRASTRUCTURE

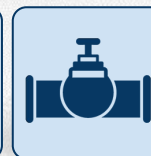
PUBLIC UTILITIES



ELECTRICITY DISTRIBUTION



ELECTRICITY TRANSMISSION



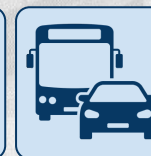
PETROLEUM PRODUCTS TRANSMISSION SYSTEMS



WATER / WASTEWATER PIPELINE SYSTEMS



SEAPORTS



PUBLIC UTILITY VEHICLES¹



With the Latest Amendments, the Philippines has taken great leaps to open up a number of sectors to full foreign ownership, and it is anticipated that this landmark legislation will significantly change the Philippine business landscape as it creates more opportunities for foreign direct investment and increases competition.

20240527_Philippine Economic Briefing_Navigating PH's Investment Landscape: Where to Invest?

ACTUAL | TARGET Procurement of Consultant / Transaction Advisor Pre-Feasibility Phase Feasibility Phase Investment Evaluation Phase Concessionaire Procurement Phase Project Implementation Phase

PROJECT CODE	SUBMITTED	PDMF APPROVAL	CONSULTANCY CONTRACT SIGNED	CONSULTANT	STATUS	2022				2023				2024				2025				2026				2027				2028			
						1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
DOTr FUNDED																																	
D.1	MMSP O&M	N/A	N/A	01 Dec 2019	ADB	Investment Evaluation																											
D.2	NSCR O&M	N/A	N/A	01 Dec 2019	ADB	Investment Evaluation																											
D.3	NAIA	N/A	N/A	03 April 2024	ADB	CA Signed																											
D.4.1	6X RAs	N/A	N/A	03 April 2024	ADB	Ongoing FS																											
D.4.2	6X RAs	N/A	N/A																														
D.4.3	5X RAs	N/A	N/A																														
PDMF BATCH 1																																	
1.1	MPL	17 Nov 2022	12 Dec 2022	14 Aug 2023	SGV	Ongoing Pre-FS																											
1.2	NLH	10 Oct 2022	12 Dec 2022	14 Aug 2023	PwC	Ongoing Pre-FS																											
1.3	NEB	12 Oct 2022	12 Dec 2022	14 Aug 2023	Deloitte	Ongoing Pre-FS																											
1.4	CBRT PPP	April 2021	14 Dec 2021	14 Aug 2023	Deloitte	Ongoing FS																											
PDMF BATCH 2																																	
2.1	SMR	13 Dec 2022	17 Feb 2023	22 Dec 2023	Rebel Group	Ongoing Pre-FS																											
2.2	MRP3	13 Dec 2022	17 Feb 2023	22 Dec 2023	Deloitte	Ongoing Pre-FS																											
2.3	NITS	29 March 2023	22 June 2023	22 Dec 2023	SGV	Ongoing Pre-FS																											
PDMF BATCH 3																																	
3.1	DOTr HQ	31 May 2023	26 Sep 2023	TBD	TBD	Ongoing CA Procurement																											
3.2	ATS-ANS	17 Oct 2023	27 Oct 2023	21 Nov 2023	IFC	Ongoing FS																											
3.3.1	3X RAs	17 Oct 2023	27 Oct 2023	22 Nov 2023	IFC	Ongoing USP Review/Nego																											
3.3.2	7X RAs	N/A	N/A																														
3.4.1	L2 REOM	18 Oct 2023	27 Oct 2023	22 Nov 2023	IFC	Ongoing FS																											
3.4.2	L6					Ongoing USP Review/Nego																											
3.4.3	L10					Ongoing USP Review/Nego																											
3.4.4	L11					Ongoing USP Review/Nego																											
PDMF BATCH 4																																	
4.1	NCICP O&M	24 Nov 2023	23 Jan 2024	TBD	IFC	Ongoing TA Procurement																											
4.2	L3 O&M	24 Nov 2023	23 Jan 2024	TBD	ADB	Ongoing TA Procurement																											
4.3	L4 O&M	24 Nov 2023	23 Jan 2024	TBD	ADB	Ongoing TA Procurement																											
4.4	PAFCS	24 Nov 2023	23 Jan 2024	TBD	ADB	Ongoing TA Procurement																											
PDMF BATCH 5																																	
5.1	NAIA IC	06 Mar 2024	01 Apr 2024	TBD	TBD	Ongoing TA Procurement																											
5.2	DPTMP O&M	15 Feb 2024	01 Apr 2024	TBD	ADB	Ongoing TA Procurement																											
PDMF BATCH 6 (UPCOMING)																																	
6.1	L5	15 Mar 2024	TBD	TBD	IFC	Ongoing PDMF Application																											
6.2	MMSP CUDI	TBD	TBD	TBD	ADB	For Application to PDMF																											
6.3	TOD DSA	TBD	TBD	TBD	ADB	For Application to PDMF																											
6.4	TOD WB-CI	TBD	TBD	TBD	IFC	For Application to PDMF																											
6.5	NEB-CBRT AA	TBD	TBD	TBD	IFC	For Application to PDMF																											

LEGEND: **PROJECT CODES:**

RED	Aviation	AVIATION	
ORANGE	Maritime	NAIA	NAIA PPP Project
YELLOW	Railways	ATS/ANS	Traffic System/Air Navigation System
GREEN	Road	RAs	Development, Rehabilitation/Upgrade Operations and Management of Various Regional Airports
BLUE	Others		NAIAPP Independent Consultant

MAXIMISE	
MPL	Manila Bay-Pasig River-Laguna Lake Ferry
NCICP O&M	New Cebu International Container Port Project Acquisition of Equipment (including Quay Cranes) and Operations and Maintenance
MMFMP	Merchant Marine Fleet Modernization Program
NPD-OWF	National Port Development for Offshore Wind Farms

RAILWAYS	
MMSP O&M	Metro Manila Subway Project Operations and Maintenance
NSCR O&M	North-South Commuter Railway Operations and Maintenance
NHLH	North Long Haul (NCR-Ilocos Norte and Cagayan) Inter-Regional Railway Project
SMR	San Mateo Railway Project
MRP3	Mindanao Railway Project, Phase II (Northern Mindanao)
L2 REOM	Development, Rehabilitation/Upgrading, Expansion, Operations and Management of the Light Rail Transit Line 2
L3 O&M	Metro Rail Transit Line 3 Operations and Maintenance Project
L4 O&M	Metro Manila Rail Transit Line 4 Operations and Maintenance Project

L5	Line 5 Subway Project (formerly MTLSP Project)
MMSP CUDI	MMSP Common Underground Data Infrastructure
ROAD	
NEB	NCR EDSA Busway Project
NCR-CBT AL	NCR EDSA Busway-Cebu Bus Rapid Transit Adviser's Advisory
CBRT PPP	Operations and Maintenance of the Cebu Bus Rapid Transit Project
NITS	North Integrated Transport System Project
DPTMP O&M	Davao Public Transport Modernization Program Operations and Maintenance
ITS	LTFRB Integrated IT System Project

OTHERS	
DOTr HQ	DOTr Headquarters Building
PAFCS	Philippine Automatic Fare Collection System Project
TOD DSA	Transit Oriented Development Project on Dep-Ed-Senate Area
TOD WB-CI	Transit Oriented Development Project (WB-CI)

Diversifying funding and financing partners



USA
(30 APRIL - 04 MAY 2023)

"I look forward to a very bright future between the Philippines and the United States, a future that is founded on the long experience and as you say, friendship and familial relationship because the people-to-people exchanges between our two countries have been ongoing at every level."



UNITED KINGDOM
(05-06 MAY 2023)



CHINA
(30 APRIL - 04 MAY 2023)

"We will seek to foster a meaningful relation and broaden our cooperation in various areas such as agriculture, energy, **infrastructure**, science and technology, trade and investment, and people-to-people exchanges, among others."



JAPAN
(08-12 FEBRUARY 2023)

"This administration is keen on working closely with Japan in forging stability and dynamism into our bilateral relations and bringing our Strategic Partnership to greater heights."



BELGIUM
(12-14 DECEMBER 2022)



SWITZERLAND
(15-20 JANUARY 2023)

"We stress the importance of economic and technical cooperation to assist the development of smaller economies and enable their participation, both of small businesses and economic segments with untapped potential, in the global economy and also of large-scale industrial development."



THAILAND
(16-19 NOVEMBER 2022)



CAMBODIA
(09-13 NOVEMBER 2022)



SINGAPORE
(06-07 SEPTEMBER 2022)

"We see our future, of the Philippines as having Singapore beside us, forging ahead to the future. Singapore—as part of our journey in maintaining political stability and economic prosperity in the region."



INDONESIA
(04-06 SEPTEMBER 2022)

"We will reaffirm our ties with fellow archipelagic nation and ASEAN co-founder, Indonesia, with whom we share an extensive maritime border in the south of the Philippines."



UNGA
(20 SEPTEMBER 2022)

"We will affirm the country's commitment to the ideals of the UN, citing its contributions to peaceful settlement of disputes and of international law and highlighting the importance of the UN in fostering international dialogue and international cooperation."



ASEAN
(10-13 NOVEMBER 2022)

Once again, we will promote the Philippines not only as an investment center, not only as a tourism center but as a partner, a global partner for our ASEAN member nations and for all our friends around the world who will be joining the ASEAN Conference."



APEC
(16-19 NOVEMBER 2022)

"APEC remains one of the Philippines' prime platforms to engage the economies in the Asia-Pacific region. The importance of this region to us cannot be overstated."



ASEAN-EU
(14 DECEMBER 2022)

"We look forward to nurturing and bringing forth ASEAN-EU relations to greater heights, in our role as country coordinator for ASEAN-EU relations in the next two years."



WEF
(16-20 JANUARY 2023)

"...we have made the commitment and I am confident that with that commitment and we follow through on that commitment that our infrastructure development will proceed."



ASEAN
(09-11 MAY 2023)

"The future of this region must be determined by ASEAN and ASEAN alone. In this decisive moment, let us continue to work together to ensure that ASEAN truly and undoubtedly matters."

DOTr will BUILD BETTER by

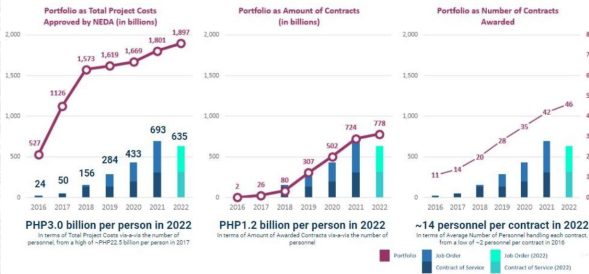
Better Project Identification,
Prioritization, and Preparation

Broader and More
Diversified Funding
Strategy

Better Project Implementation Strategies

Building Better with strengthened project implementation capacity

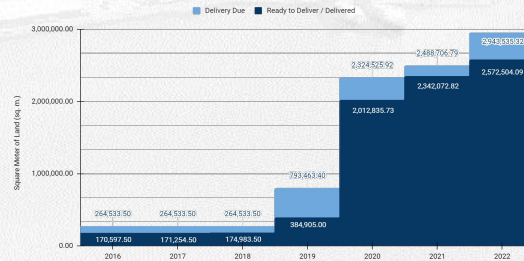
RAILWAYS HEADCOUNT PER CONTRACT PER YEAR



Building Better through responsive delivery of ROW

SQM OF LAND HANDED OVER TO CONTRACTORS (RAIL) PER YEAR

SQUARE METER OF LAND HANDED OVER CONTRACTORS FOR RAIL PROJECTS
Per year progress status



Advocating ESG as an implementation tool, not just a compliance checklist

PARITY TRACK RECORD IN RIGHT-OF-WAY ACQUISITION*

*ROW data for the Railways Sector



1 Relocation of 1,264 families

No forced relocation to date



2 80% Voluntary Acquisition

80% of Land Acquisition is done through **NEGOTIATED and VOLUNTARY SALE**



3 Disbursed PHP 165 Million

The DOTr has disbursed a total of PHP 165,585,215 to ensure that those **affected** are given just entitlement

There is a misconception that
ESG Safeguards Slows Down
Project Implementation

- ✓ Safeguards enhances overall Value for Money because of ancillary benefits
- ✓ Building capability in ESG compliance unlocks financing resources that have ESG conditions



ONGOING ORG DEV INITIATIVE FOR ROAD SECTOR

ADB TA 9336-PHI

Strengthening Infrastructure Capacity and Innovation for Inclusive Growth - Organizational Planning Consultant to Support the Establishment of the EDSA Greenways Project and Davao Public Transport Modernization Project Management Offices

DOTr INSTITUTIONAL STRENGTHENING COMMITTEE

Office Order No. 2022-007

Implementing Guidelines on the Reorganization of the Department

Department Order No. 2022-013







Requirements and Timeline for the Submission and Review of the Documents Required under Office Order No. 2022-007

Projects	Total for Acquisition	through NVS ¹	through Expropriation	Total Acquired	% Voluntary Acquisition
LICE	293	223	40	263	84.79%
MMSP	1,977	473	50	523	90.44%
N1	352	176	16	192	91.67%
N2	1,953	53	0	53	100.00%
SC	2,478	7	0	7	100.00%
MRP	3,603	5	0	5	100.00%
MRT7	121	18	4	22	81.82%
TOTAL	10,777	955	110	1,065	89.67%

PMO	Total for Relocation	without forced demolition	through Forced Demolition
LICE	1,774	804	0
MMSP	251	188	0
N1	875	247	0
N2	2,448	38	0
SC	10,776	0	0
MRT-7	173	173	0
TOTAL	16,297	1,450	0

How to participate

AS A CONTRACTOR / SUBCONTRACTOR / CONSULTANT* / SUBCONSULTANT*

	FUND SOURCE					
	FOREIGN-ASSISTED PROJECTS ^c			LOCALLY-FUNDED PROJECTS		
						
	JAPAN INTERNATIONAL COOPERATION AGENCY	ASIAN DEVELOPMENT BANK	EXPORT-IMPORT BANK OF KOREA	WORLD BANK GROUP	LOCALLY-FUNDED	PUBLIC-PRIVATE PARTNERSHIPS
LEAD NATIONALITY REQUIREMENT	Has to be Japanese.	Any ADB-member country.	Has to be Korean.	Any WB-member country.		
MINIMUM CONTENT REQUIREMENT	30% minimum Japanese content.	None.	25% minimum Japanese content; Variable maximum third country content	None.	60-40 Filipino-Foreign requirement for Infrastructure Contracts; Goods Contracts open to Foreign, provided there is reciprocity	Private Proponent selects partners and subcontractors
JOINT VENTURE REQUIREMENT	Relatively low requirements for Joint Venture members	Relatively high requirements for Joint Venture Members	Relatively low requirements for Joint Venture members (nationality requirements)	-		
SUBCONTRACTING REQUIREMENT	Subcontractor qualifications depend on whether nominated for qualifications compliance	Same for subcontractor.	None.	-		

**Requirements vary depending on bilateral/multilateral partner and may include (i) lead nationality requirement, (ii) minimum % interest of nationality, (iii) JV requirements, among others.*

AS O&M CONCESSIONAIRE

Foreign operators allowed to have 100% interest in Operations and Maintenance

AS TECHNICAL ASSISTANCE CONSULTANT

Depending on rules and guidelines of Development Partners



My order to the DOTr is really very simple:

FULL SPEED AHEAD!

President Ferdinand "Bongbong" Marcos Jr. during his July 2022 SONA

THANK YOU!