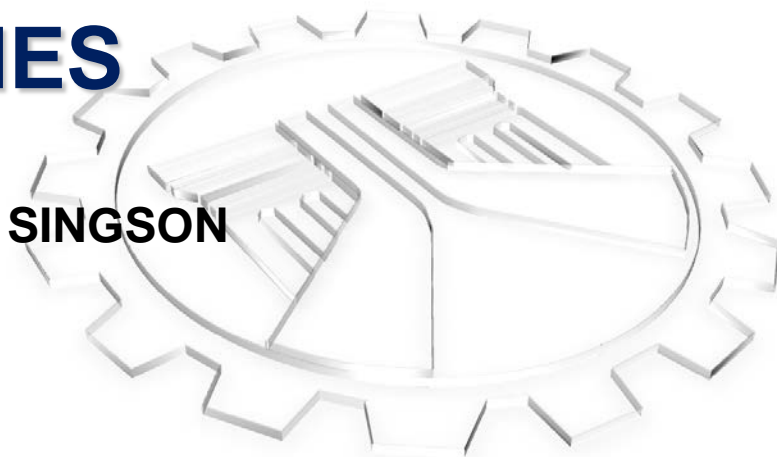

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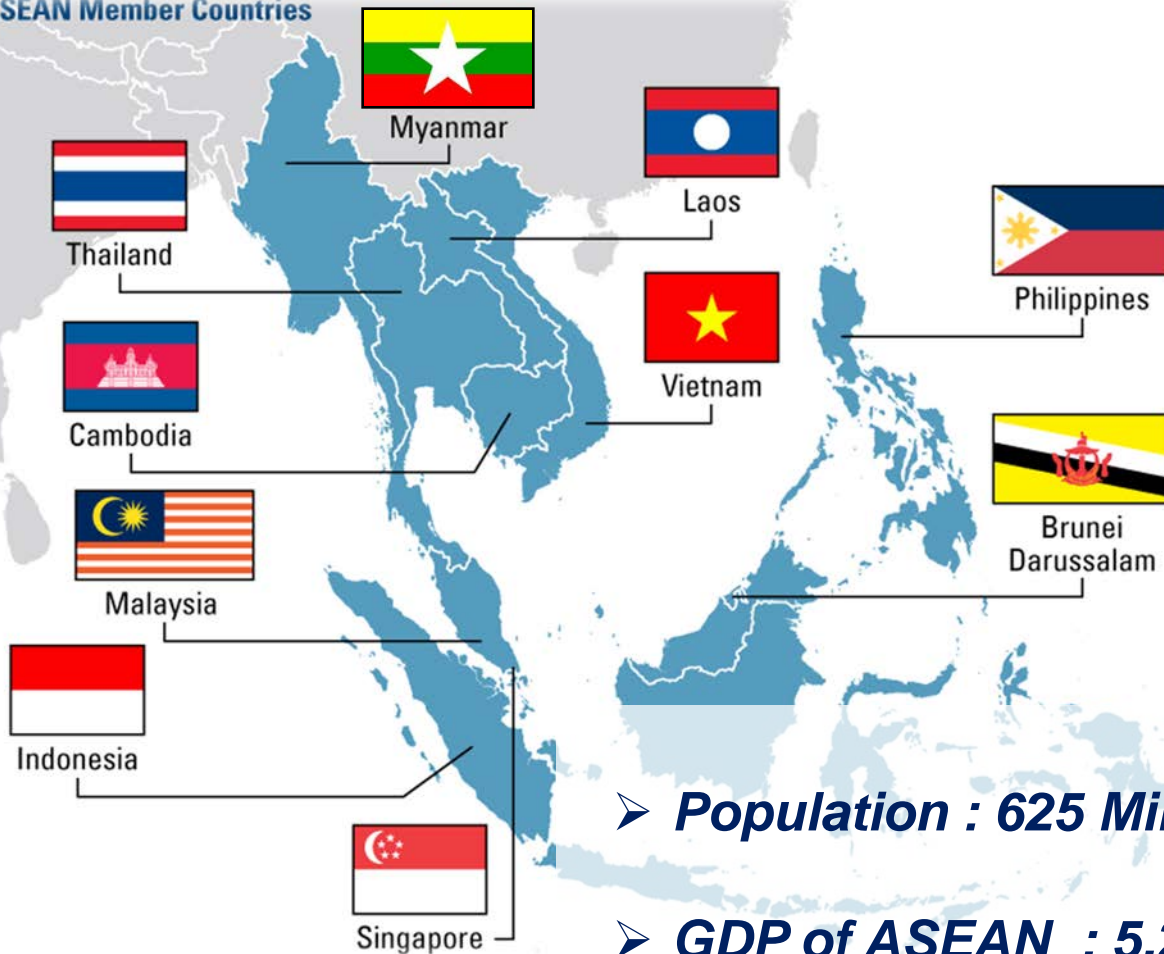
INVESTMENT OPPORTUNITIES IN THE PHILIPPINES

Secretary ROGELIO L. SINGSON

12 May 2015

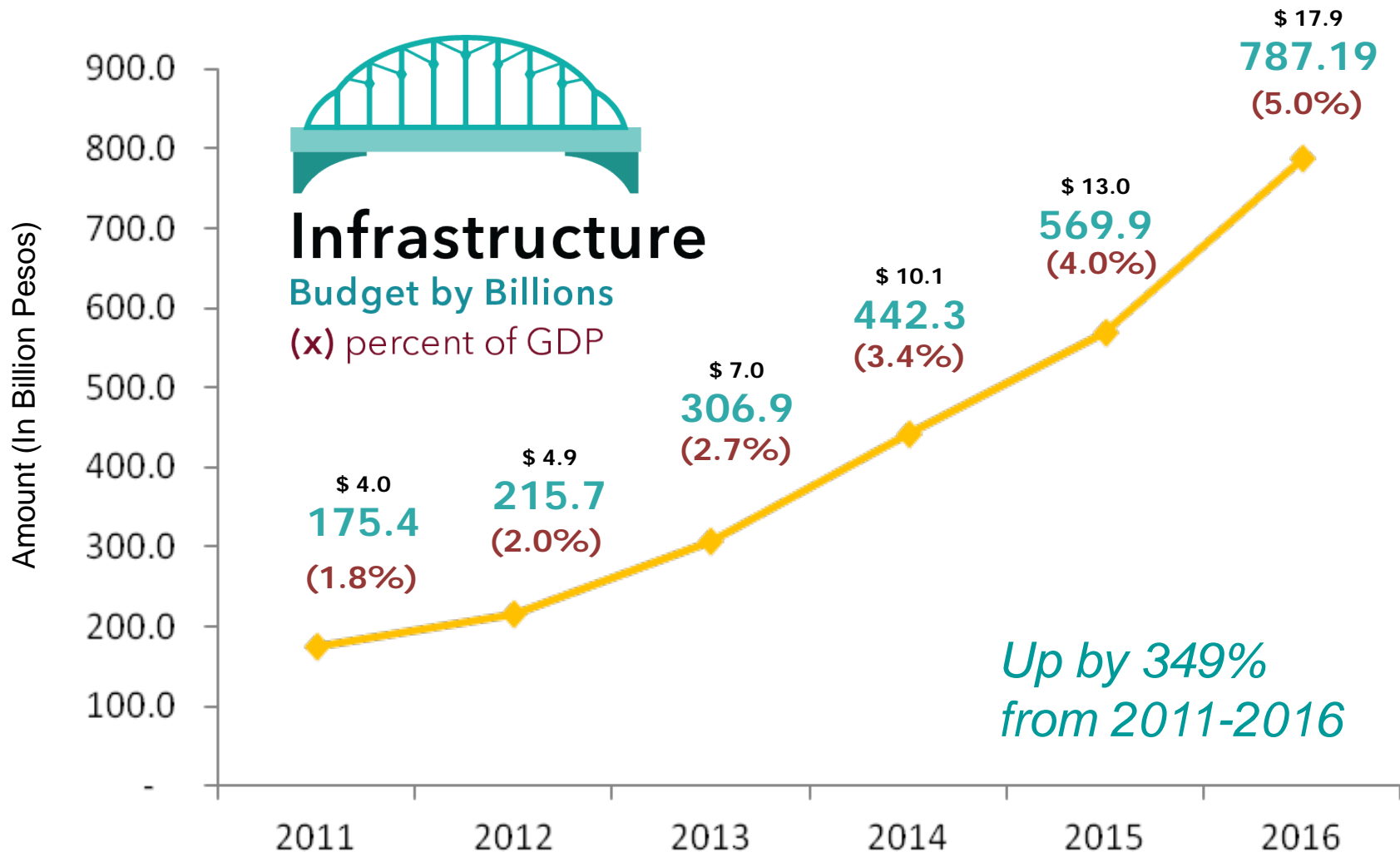


ASEAN Member Countries



- **Population : 625 Million***
- **GDP of ASEAN : 5.2%***
- **6th Largest Economy**
- **Opportunities for Infrastructure Investments**

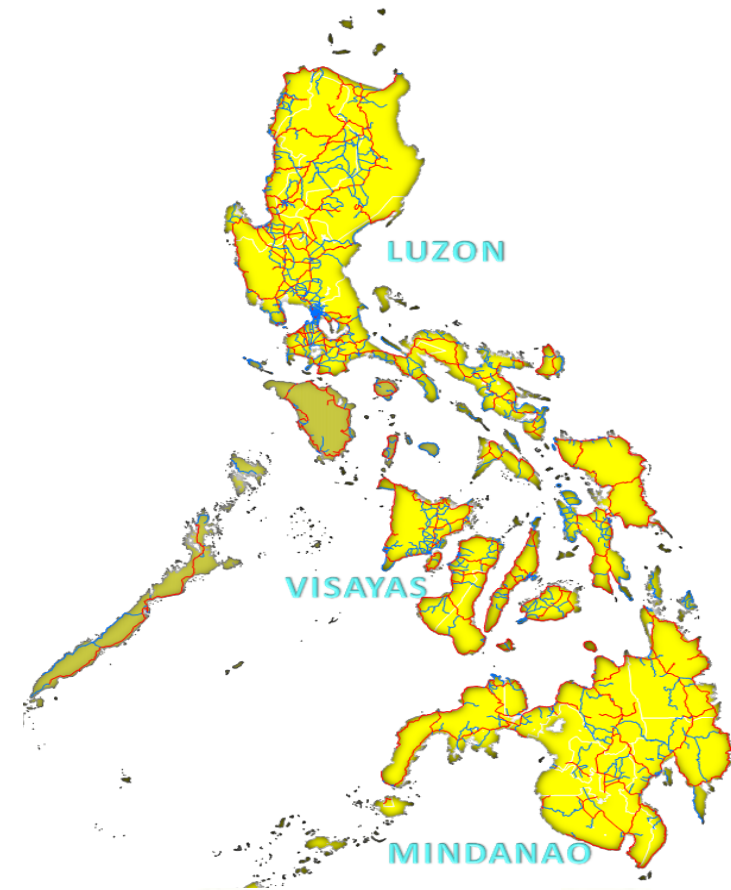
* As of 2013
www.asean.org





Condition of Philippine Road Network:

311,031	Total Land Area (sq. km)					
210,055	Total Overall Road Network (km)					
32,526	Total National Road Length (km)					
0.68	Road Density (km/sq. km)					
0.20	Paved Road Density (km/sq. km)					
0.29	Overall Paved Road Ratio					
0.86	Paved Road Ratio for National Roads					
	Total		Permanent		% Permanent	
	No.	Lm.	No.	Lm.	No.	Lm.
National Bridges	8,131	364,693	7,922	358,987	97.4%	98.4%
	Road Network		Total (km)		Paved (km)	
	National		32,526		27,816	
	Primary		7,060		7,043	
	Secondary		14,051		12,196	
	Tertiary		11,415		8,577	
	Local Road		177,529		32,870	
	Provincial		30,132		10,256	
	Municipal		15,349		5,375	
	City		15,283		9,295	
	Barangay		116,765		7,943	
Total	210,055		60,686		28.9%	



National, Provincial and City Road Inventory as of 2014
Municipal and Barangay Road Inventory as of 1999

Source: National Road-DPWH; Local Road-DILG; Land Area-DENR

DPWH Key Strategic Policies and Programs:



Good Governance Reform and Anti-Corruption Program

Better Quality and Safer National Roads and Bridges Program

Effective Flood Control Program

Strategic Convergence Program

Public Private Partnership Program

Resiliency Program

DPWH Convergence Programs:



TOURISM CONVERGENCE PROGRAM:

- Infrastructure support to designated strategic Tourism Destinations.

CONVERGENCE FOR AGRI INFRASTRUCTURE:

- Undertake Farm to Market Road Network to access food production and processing sites;
- Water impounding projects to optimize water resources for irrigation and flood management;

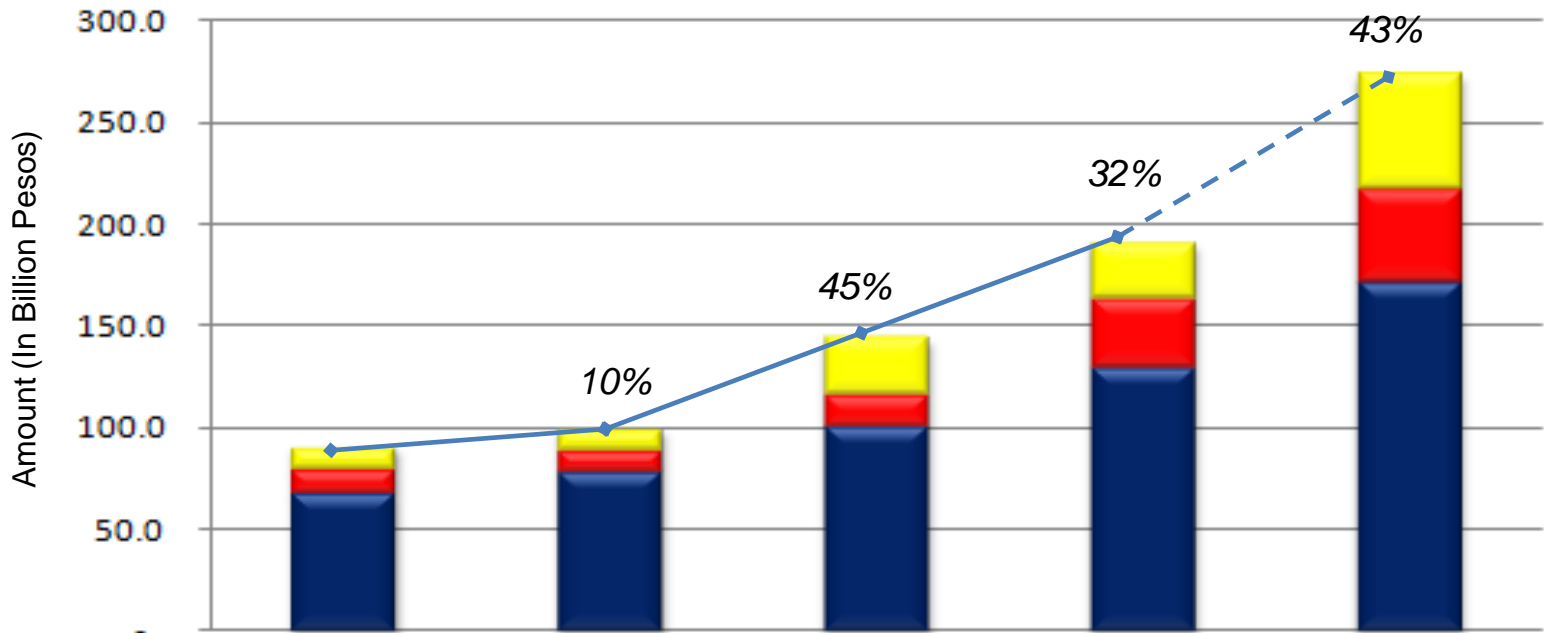
FLOOD MANAGEMENT PROGRAM:

- Implement flood mitigation /intervention projects consistent with the Flood Management Master Plan for Metro Manila and Surrounding areas;
- Integrated Water Resources Management with NIA/DA /DENR/LWUA;
- Clear waterways of Metro Manila and address drainage capacity constraints;.

INTEGRATED TRANSPORT SYSTEM:

- Support for access to major airports, seaports and RORO ports;
- Mindanao Logistics Infrastructure Network Program;

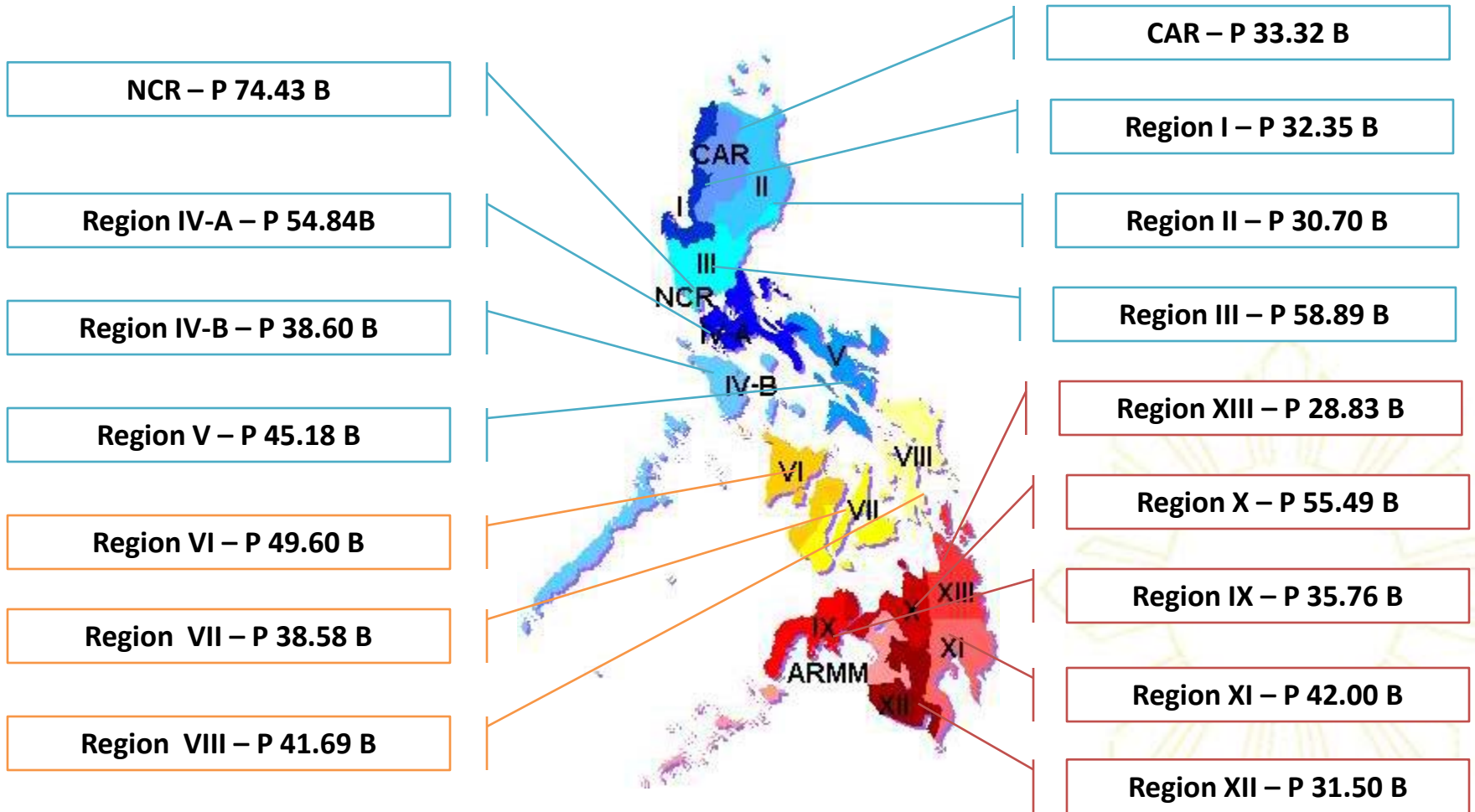
2011-2015 DPWH Infrastructure Program: Capital Outlays (By Category)



	2011	2012	2013	2014	2015	%
Highways	68.0	78.1	100.9	129.4	170.4	(62%)
Flood Control	11.3	10.8	15.9	33.6	45.9	(17%)
Others	11.3	10.6	27.6	27.9	57.7	(21%)
Total P'B	P 90.7 B	P 99.5 B	P 144.3 B	P 190.9 B	P 273.9 B	(100%)
US \$'B	US \$ 2.1 B	US \$ 2.3 B	US \$ 3.3 B	US \$ 4.3 B	US \$ 6.2 B	



Distribution of FY 2011 - FY 2015 Budgets by Region: (Capital Outlays)



Proposed High Standard Highway (HSH) Network in Metro Manila and its 200km Sphere:



ON-GOING : 152.57 km

Project Name	Km	P 'B	US\$ 'M	Completion
Daang Hari-SLEx Link	4.00	2.01	45.68	2015
STAR, Lipa – Batangas , Phase II	19.74	2.32	52.73	2015
NLEX Harbor Link, Segment 9*	2.42	1.15	26.14	2015
NLEX Harbor Link, Segment 10*	5.65	9.00	204.55	2016
NAIA Expressway	7.15	15.86	360.45	2016
Tarlac-Pangasinan-La Union Exp.	88.85	21.38	485.89	2018
Metro Manila Skyway Stage 3*	14.80	37.43	850.68	2018
Plaridel By-Pass Road, Phase II	9.96	3.34	75.91	2018

APPROVED FOR IMPLEMENTATION: 187.12 km

Project Name	Km	P 'B	US\$ 'M	Completion
NLEX-SLEX Connector Road	8.00	20.00	454.54	2018
SLEX TR4, Sto. Tomas-Lucena*	57.52	13.08	297.27	2019
CLLEX – P I (Tarlac-Cabanatuan)	30.00	14.94	339.55	2019
CALA Expressway	44.60	35.43	805.23	2020
Laguna Lakeshore Expressway Dike	47.00	122.81	2,791.14	2022

ADDITIONAL PROPOSED: 77.20 km

Project Name	Km	P 'B	US\$ 'M	Completion
C6-P I, Southeast Metro Manila Exp.*	34.00	31.32	711.82	2019
NLEX Harbor Link, Segment 8.2*	7.50	6.50	147.73	2019
CLLEX - P II (Cabanatuan-San Jose)	35.70	14.20	322.73	TBD

* TRB Projects



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LAGUNA LAKESHORE EXPRESSWAY DIKE (LLED)

PROJECT DESCRIPTION:

- 47 kilometers of 6-lane expressway dike with two (2) sections as follows:
 - Bicutan-Calamba
 - Calamba-Los Baños
- 700 hectares Rawland Reclamation and Horizontal Development Component, intended for mixed land uses.

PROJECT OBJECTIVE:

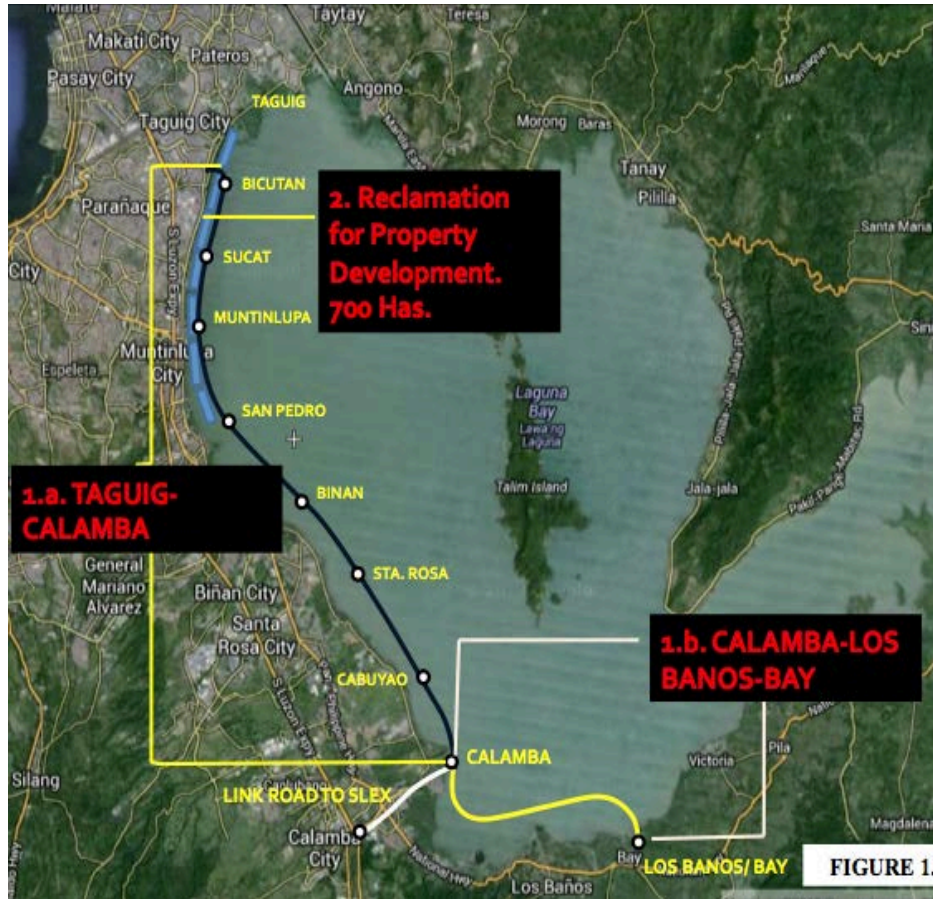
- To provide a high standard highway cum dike that will facilitate traffic flow and mitigate flooding in the western coastal communities along Laguna Lake, from Bicutan/Taguig in Metro Manila through Calamba to Los Baños in Laguna.

ESTIMATED COST:

- Expressway Dike-P 64.9 Billion (\$1.5B)
- Reclamation-P 57.9 Billion (\$1.3B)
- Total-P122.8 Billion (\$ 2.8B)

TARGET TIMELINES:

- 2016-2022





Long Term Road Maintenance Program

Name of Project	Cost	Schedule	Status
<i>National Roads Improvement and Management Program, Phase II (World Bank -Assisted), 680.67 km</i>			
North Luzon (Manila North Road: Monumento - Agoo/ Aringay Boundary, La Union Section), 234.00 km	P 1.544 B (\$ 35.09 M)	Sep. 2013-Sep. 2018	On-going
South Luzon (Pagsanjan -Tayabas - Lucena and Tiaong-Lucena Diversion Road-Pagbilao-Sta. Elena, Camarines Norte Section), 207.26 km	P 1.656 B (\$ 37.64 M)	Sep. 2013-Sep. 2018	On-going
Mindoro East Coast (Calapan –Socorro-Bongabong- Dangay Port Section), 127.74 km.	P 0.902 B (\$ 20.50 M)	Sep. 2013-Sep. 2018	On-going
Panay Island (Caticlan - Kalibo-Aklan/Capiz Prov'l. Bdry. Road), 111.67 km.	P 1.138 B (25.86 M)	April 2013-April 2018	On-going



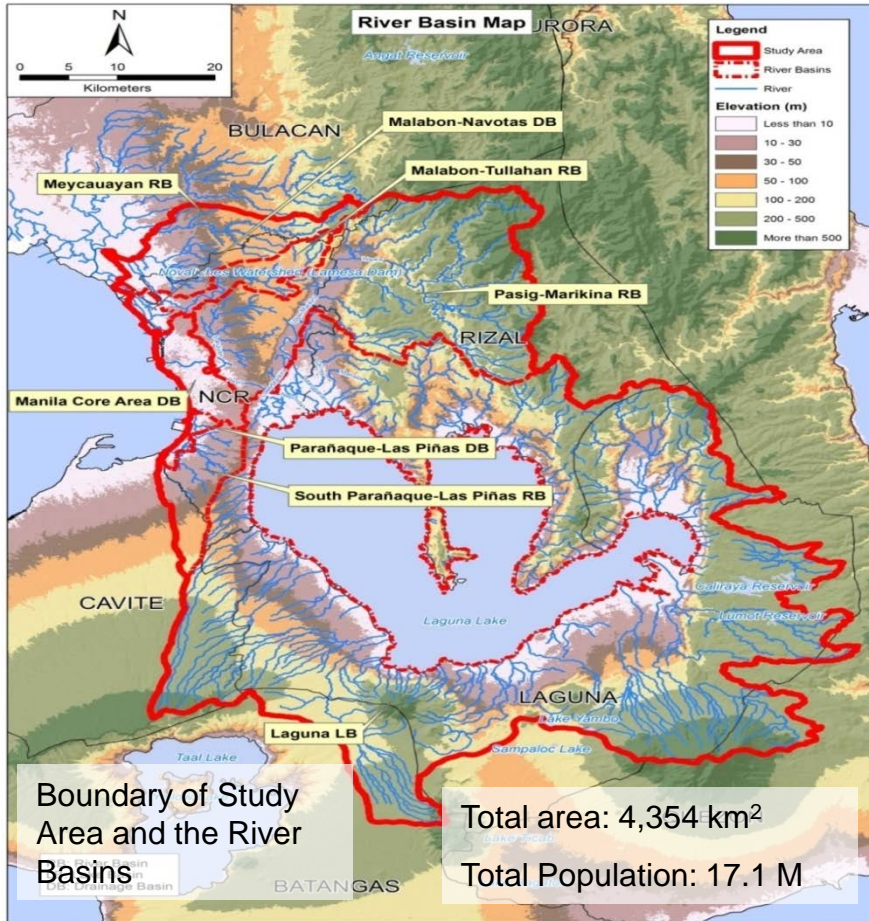
Long Term Road Maintenance Program

Name of Project	Cost	Schedule	Status
<i>Road Upgrading and Preservation Project, RUPP (JICA-Assisted), 644.37 km</i>			
Manila North Road, Aringay-Santa/Vigan City, K0243+000 to K0389+000, 146 km	P 2.047 B (\$ 46.52 M)	May 2015-May 2020	Notice of Award was issued on Feb. 16, 2015
Manila North Road, Santa/Vigan City-Laoag City , K0389+000 to K0-485+123, 96.123 km	P 1.542 B (\$35.05 M)	May 2015-May 2020	Notice of Award was issued on Feb. 16, 2015
Maharlika Highway, Sta. Rita-Cabanatuan City, K0038+732 to K0112+500, 73.768 km	P 1.685 B (\$38.30 M)	June 2015-June 2020	Bid evaluation on-going
Maharlika Highway, Cabanatuan City-Nueva Ecija/Nva. Viz. Brdy., K0112+500 to K0208+000, 95.5 km	P 1.835 B (\$41.70 M)	June 2015-June 2020	Resolution of Award was approved on March 4, 2015
Maharlika Highway, Sipocot-Baao Road, Camarines Sur, K0370+700 - K0480+180, 109.4 km	P 2.001 B (\$45.48M)	June 2015-June 2020	Bid evaluation on-going
Surigao-Davao Road, Surigao-Agusan Del Norte, K1113+500 - K1237+000, 123.5 km	P 3.321 B (\$75.48M)	June 2015-June 2020	Resolution of Award for approval

Master Plan for Flood Management in Metro Manila and Surrounding Areas:



Based on river basins:
Pasig-Marikina River Basin and Laguna Lake Basin.



Name of Project	Est. Cost
Pasig-Marikina River Improvement and Dam Construction	198.435 B
Meycauayan River Improvement	14.040 B
Malabon-Tullahan River Improvement	21.635 B
South Parañaque-Las Piñas River Improvement	17.335 B
East Mangahan Floodway (Cainta & Taytay River Improvement)	25.901 B
West Laguna Lakeshore Land Raising	25.185 B
Land Raising for Small Cities around Laguna Lakeshore	7.158 B
Improvement of the Inflow Rivers to Laguna Lake	0.637 B
Manila Core Area Drainage Improvement	27.257 B
West Mangahan Area Drainage Improvement	5.522 B
Valenzuela-Obando-Meycauayan (VOM) Improvement	8.613 B
Total:	P 351.718 B (\$ 7.994 B)



Major Flood Control Projects:

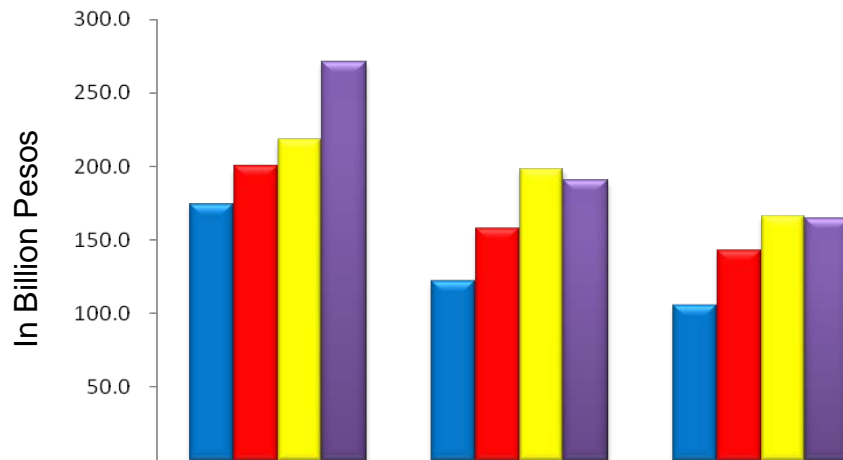
Name of Project	Proj. Cost	Status/Remarks
Flood Management Master Plan for Metro Manila and Surrounding Areas	P 351.718 B (\$ 7.99 B)	Various stages of implementation Started in 2013
Pasig-Marikina River Channel Improvement Project, Phase III (JICA-Assisted)	P 7.545 B (\$ 171.5 M)	On-going Start Date-June 2014 Completion Date-June 2017
Flood Risk Management Project (FRIMP) in Cagayan, Tagoloan and Imus Rivers (JICA-Assisted)	P 5.587 B (\$ 126.9 M)	Bid documents for the procurement of civil works contractor is under process. Start Date-March 2016 Completion Date-Feb. 2019
Integrated Disaster Risk Reduction and Climate Change Adaptation Measures in the Low Lying Areas of Pampanga Bay (KEDCF)	(P 4.215B) \$ 95.8 M	Loan Signing-October 2013 Start Date-Feb. 2016 Completion Date-Nov. 2019
Flood Risk Management Project for Cagayan de Oro River (Proposed for JICA Financing)	(P 8.549 B) \$ 194.3 M	Start Date-March 2017 Completion Date-March 2021



DPWH Performance Report:

FY 2014 Fund Utilization vs. Previous Years

Full Year

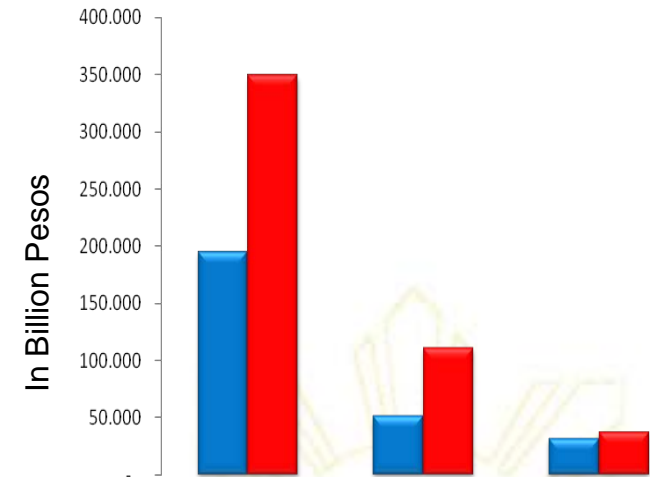


	Allotments	Obligations	Disbursements (NCA,TRA,FC, FNC)
2011 Full Year	172.2	121.6	105.5
2012 Full Year	200.0	157.9	142.9
2013 Full Year	218.0	198.1	163.3
2014 Full Year	271.1	190.5	164.7

	2011	2012	2013	2014
Obligations vs. Allotments	71%	79%	91%	70%

FY 2015 Fund Utilization vs. FY 2014

1st Quarter



	Allotments	Obligations	Disbursements (NCA,TRA,FC, FNC)
2014 (1st Quarter)	195.1	51.8	31.5
2015 (1st Quarter)	349.0	111.1	37.7

	2014	2015
Obligations vs. Allotments	27%	32%

Note: NCA-Notice of Cash Allocation; TRA-Tax Remittance Advice; FC-Forex Cash; FNC-Forex Non-Cash

Moving Forward:

Continuing investments in infrastructure for more jobs and sustained growth.



- ***Institutionalize Good Governance and Anti-Corruption Reforms***
 - ***Right project , right cost , right quality, right on time and right people***

- ***Infrastructure Investment for GOP to grow from 1.8% of GDP in 2011 to 5.0% of GDP in 2016.***

- ***DPWH will pursue investments in:***
 1. ***Upgrading Quality and Safety of Roads and Bridges with stronger private sector participation***
 - ***Long Term Road Maintenance Contracts***
 - ***Design and Build Bridge Program***

 2. ***Better access to Tourism Destinations, Airports, Seaports, RO Ports, Food Production Areas, and PEZA Zones***

 3. ***Flood Risk Reduction Program and Structural Resilience***
 - ***Flood management convergence program with other stakeholders***

 4. ***Mindanao Logistics Network Program***

 5. ***Disaster Risk Reduction and Resiliency Program***

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THANK YOU !!!

