

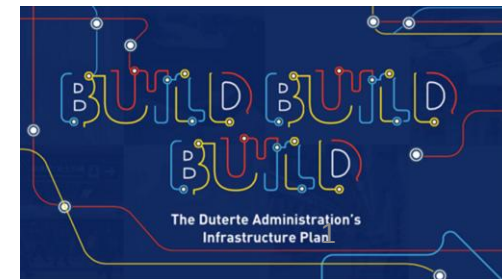
Aviation and Airports Sector Updates

Arangkada Joint Chamber of Commerce

Undersecretary Roberto C.O. Lim

AIM, Legazpi Village

15 February 2017



Philippines Aviation and Airports Strategy

➤ Developing Aviation Transport Infrastructure

- Maximizing existing airports
- Expanding existing airports
- Building new airports

➤ Improving User Experience

- Airport experience
- Airline experience

Major Infrastructure Projects

❖ Luzon

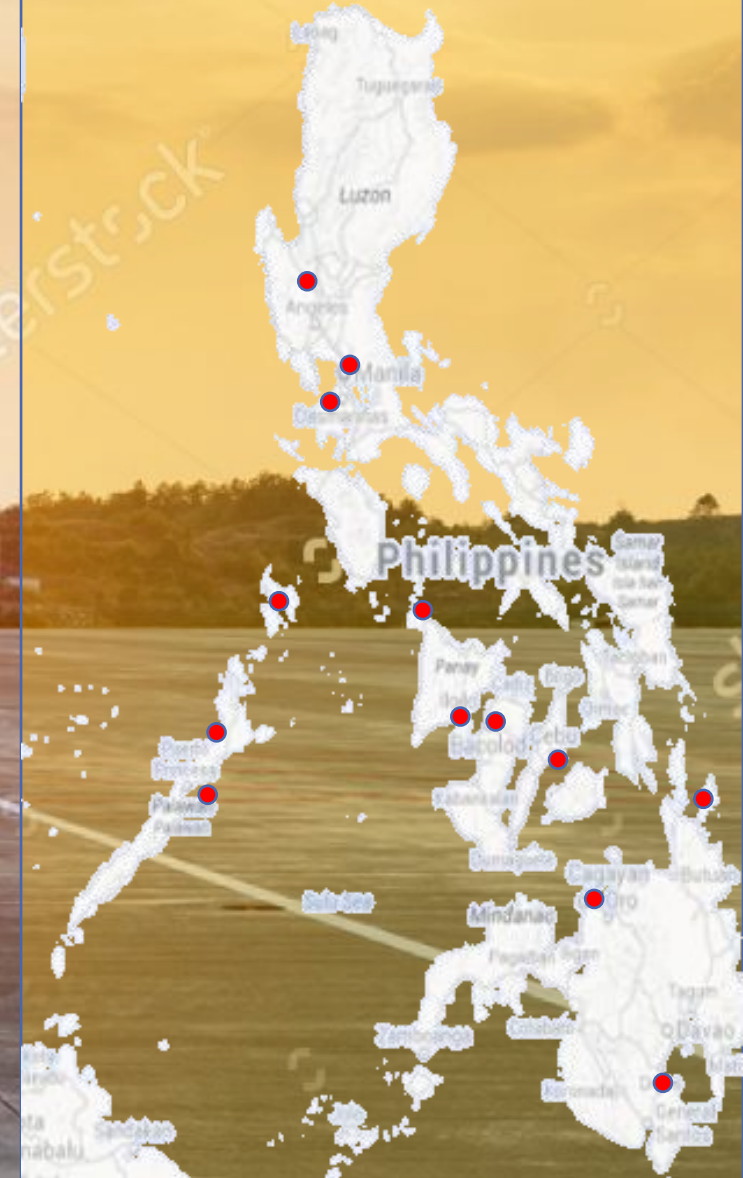
- Ninoy Aquino Int'l Airport
- New Manila Int'l Airport
- Sangley Airport
- Clark Int'l Airport
- Bicol Airport

❖ Mindanao

- Davao Int'l Airport
- Laguindingan Int'l Airport
- Zamboanga International Airport
- Siargao Airport

❖ Visayas

- Mactan-Cebu Int'l Airport
- Iloilo Int'l Airport
- Bacolod-Silay Int'l Airport
- New Bohol (Panglao)
- Boracay Airport
- San Vicente Airport
- Puerto Princesa Int'l. Airport
- Busuanga Airport

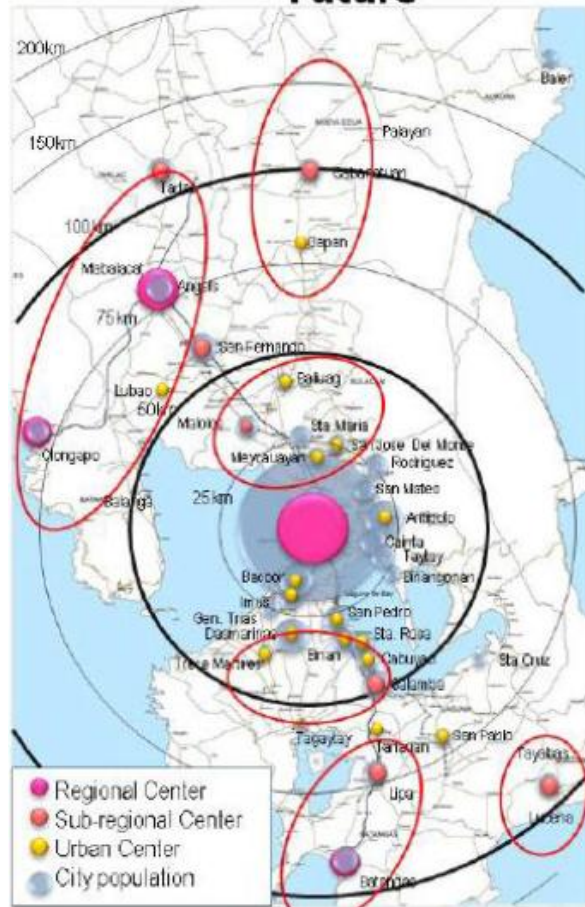


Ninoy Aquino International Airport

- Completed Terminal 1 improvement projects
- CNS/ATM turn over in July 2017
- On-going runway optimization to increase aircraft handling capacity
- Ongoing investments in civil works eg RET, taxiways
- Procurement of technology-land and air traffic management
- PPP, hybrid, and other modes of airport development under study



New Manila International Airport



- Multi airport system-provide additional capacity to Greater Capital Region and surrounding environs
- JICA survey of sites
- Announcements
- Expression of interests
- Submission of unsolicited proposals in accordance with BOT law.

Sangley Airport

- Development of Sangley into an international Airport and seaport -PRA JV ;unsolicited proposal
- Suspended interim measure to repair and restore Sangley for General Aviation flights :
 - Repair and rehabilitation of runway, flooding system and certain airside facilities
 - Construct hangars; and a 800 sq meter PTB



PROJECT DESCRIPTION

NEW MANILA INTERNATIONAL AIRPORT

Project Location : Bulakan, Bulacan
Project Cost: 699 billion



Structure Proposed: Build-Operate-
Transfer-Operate – Maintain (BOTOM)

Concession Details:

- Construction – 6yrs
- 50 years O & M
- Right to O & M after



Area Covered – Approx. 2,500 hectares
a. Airport Complex - 1,168has; including 100has for government center
b. City Complex – 1,332has

Passenger Terminal Building

- a. Initial capacity - 100mppa;
- b. Expansion – additional 100mppa

AIRPORT CITY COMPLEX DEVELOPMENT
NEW MANILA INTERNATIONAL AIRPORT



Runways (parallel)

- a. 2 runways - 3.5km x 45m;
- b. Another 2 runways – 2.6km x 45m;
- c. Provision for another 2 runways – 2.2km x 45m

AIRPORT CITY COMPLEX DEVELOPMENT

NEW MANILA INTERNATIONAL AIRPORT

NEW MANILA INTERNATIONAL AIRPORT TRANSPORTATION ACCESS

NLEX MARILAO (8 MINS)
VIA AIRPORT EXPRESSWAY

BALINTAWAK (26 MINS)
VIA AIRPORT EXPRESSWAY
& NORTH LUZON EXPRESSWAY

ORTIGAS CENTER (40 MINS)
VIA NORTH LUZON EXPRESSWAY
& EDSA

BUENDIA/MAKATI (45 MINS)
VIA NORTH LUZON EXPRESSWAY
& EDSA

ANDA CIRCLE (20 MINS)
VIA NEW SHORELINE EXPRESSWAY

ENTERTAINMENT CITY (30 MINS)
VIA NEW SHORELINE EXPRESSWAY

SJDM CITY (30 MINS)
VIA AIRPORT EXPRESSWAY
& MRT 7 ROAD/SEMME PH 2

SM NORTH EDSA (60 MINS)
VIA AIRPORT EXPRESSWAY
& MRT 7

SAN MATEO (48 MINS)
VIA AIRPORT EXPRESSWAY
& SEMME PH 2

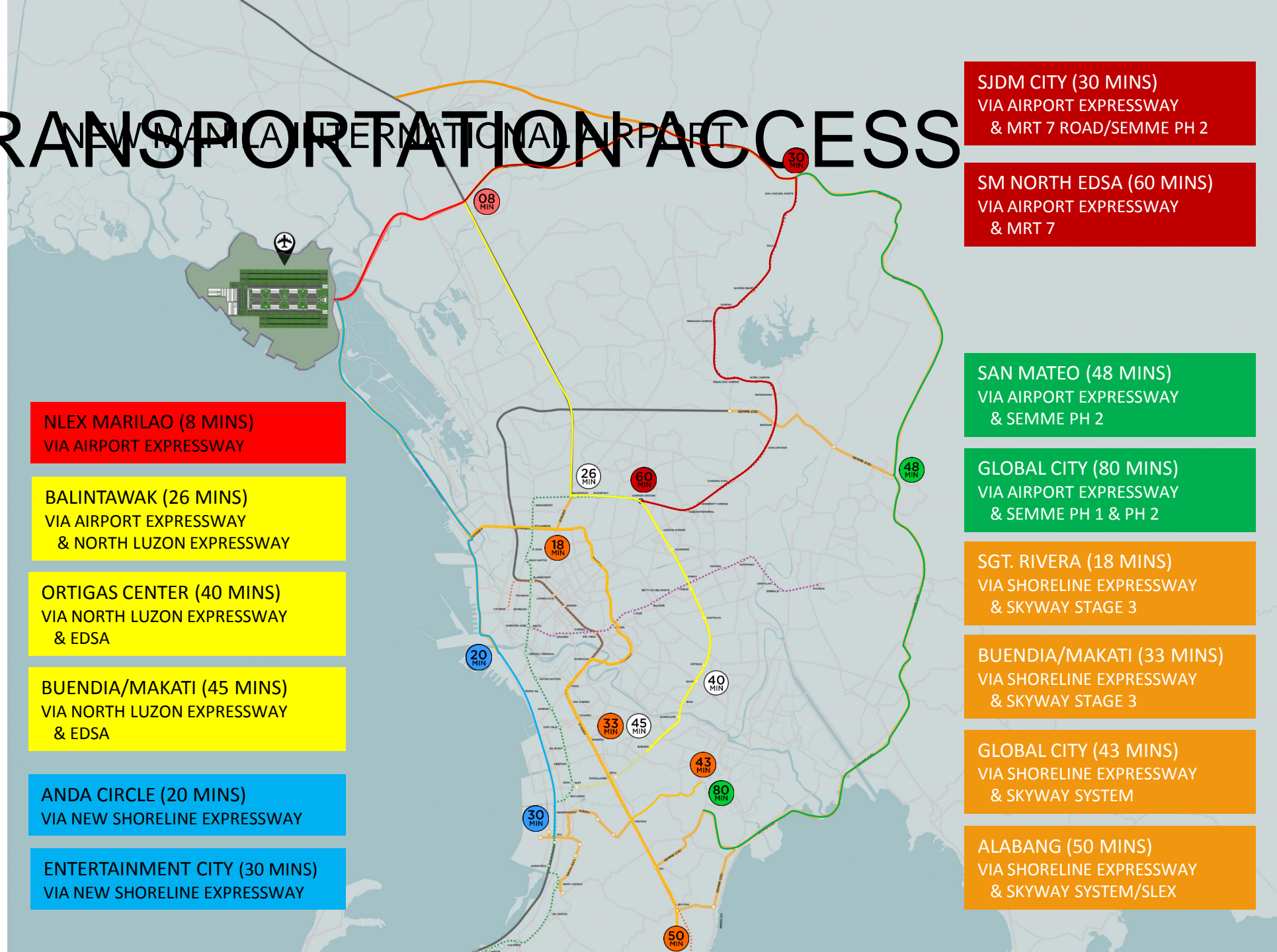
GLOBAL CITY (80 MINS)
VIA AIRPORT EXPRESSWAY
& SEMME PH 1 & PH 2

SGT. RIVERA (18 MINS)
VIA SHORELINE EXPRESSWAY
& SKYWAY STAGE 3

BUENDIA/MAKATI (33 MINS)
VIA SHORELINE EXPRESSWAY
& SKYWAY STAGE 3

GLOBAL CITY (43 MINS)
VIA SHORELINE EXPRESSWAY
& SKYWAY SYSTEM

ALABANG (50 MINS)
VIA SHORELINE EXPRESSWAY
& SKYWAY SYSTEM/SLEX



DOTr Parameters & Guidelines:

- No sovereign guarantee to be extended to NMIA
- No government subsidy
- No existing NAIA traffic will be mandated to transfer to NMIA

Clark International Airport



- Development into a 8 mppa airport pursuant to an Aeroport de Paris Feasibility Study
- Evaluating unsolicited proposal to expand the PTB, to operate and maintain airport.

Mactan-Cebu International Airport

- Handover to GMR-Megawaide (PPP Concessionaire) in August 2014
- Design capacity of 4.5 mppa
 - 6.9 mppa in 2014
 - 8.8 mppa in 2016
- On-going construction of Terminal 2 (ahead of schedule)



Iloilo International Airport



- On-going PPP tender for expansion, operations, and maintenance by a private concessionaire
- PPP required expansion:

| Description | Current | Estimate |
|-----------------------------------|--------------------|--|
| Runway | 2,500m x 45m | Same |
| Passenger Terminal Building (PTB) | 13,700 sq. m | Phase 1 – 26,500 sq. m Phase 2 – 40,700 sq. m Phase 3 – 65,300 sq. m |
| Apron | 48,210 sq. m | Phase 2 – 130,000 sq. m Phase 3 – 140,000 sq. m |
| Design Capacity | ~ 1.4 M passengers | 4.5 M passengers (2025) 7.4 M passengers (2035) 12.0 M passengers (2045) |

Bacolod-Silay International Airport

- On-going PPP tender for expansion, operations, and maintenance by a private concessionaire
- PPP required expansion:

| Description | Current | Estimate |
|-----------------------------------|----------------------|---|
| Runway | 2,002m x 45m | 2,500m x 45m |
| Passenger Terminal Building (PTB) | 6,187 sq. m | Phase 1 – 19,200 sq. m Phase 2 – 24,800 sq. m Phase 3 – 41,900 sq. m |
| Apron | 25,300 sq. m | Phase 1 – 30,000 sq. m Phase 2 – 70,000 sq. m Phase 3 – 130,000 sq. m |
| Design Capacity | ~ 800,000 passengers | 3.1 M passengers (2025) 5.0 M passengers (2035) 8.2 M passengers (2045) |



New Bohol (Panglao) Airport



- On-going JICA-funded construction of a new airport in Panglao Island to replace existing Tagbilaran Airport
- On-going PPP tender for operations, maintenance, and expansion by a private concessionaire

Laguindingan International Airport



- On-going PPP tender for expansion, operations, and maintenance by a private concessionaire
- PPP required expansion:

| Description | Current | Proposed (total) |
|-----------------------------------|------------------|---|
| Runway | 2,100 m | Phase 2 - 3,500 m |
| Cargo Terminal Building (CTB) | 350 sq. m | Phase 1 (2015-2018) - 8,652 sq. m Phase 2 (2024-2026) - 13,444 sq. m Phase 3 (2033-2035) - 20,857 sq. m |
| Passenger Terminal Building (PTB) | 7,184 sq. m | Phase 1 - 14,490 sq. m Phase 2 - 22,480 sq. m Phase 3 - 34,875 sq. m |
| Design Capacity | 1.6 M passengers | 4.3 M passengers (2025) 7.0 M passengers (2035) 10.9 M passengers (2044) |

Davao International Airport

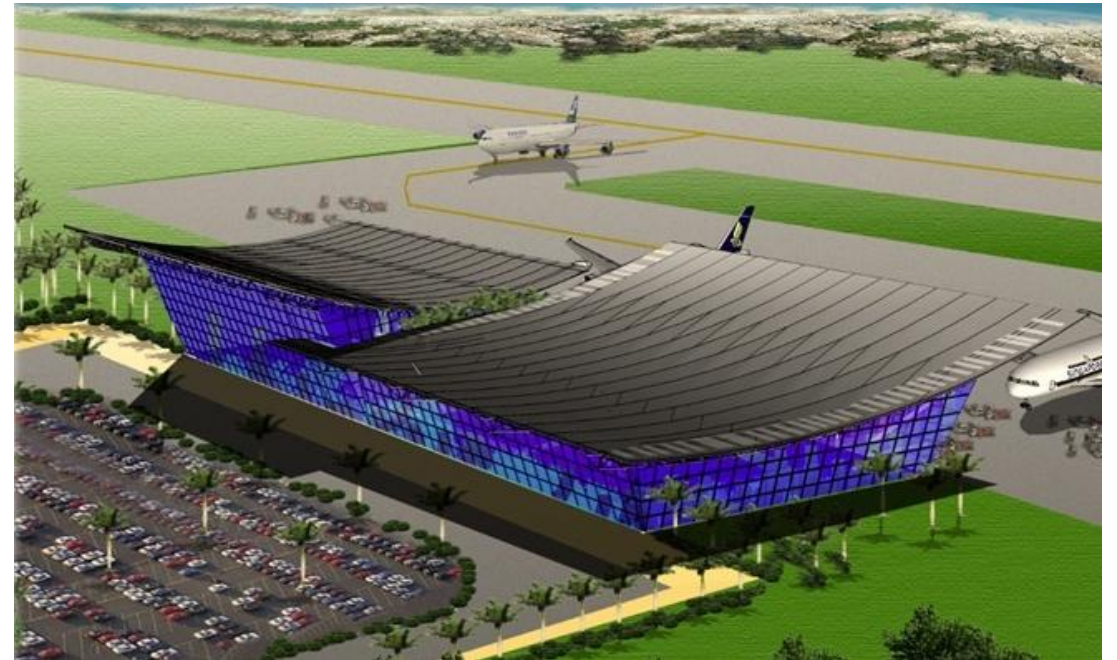
- On-going PPP tender for expansion, operations, and maintenance by a private concessionaire
- PPP required expansion:

| Description | Current | Estimate |
|-----------------------------------|-------------------|---|
| Runway | 3,000m x 45m | Same |
| Passenger Terminal Building (PTB) | 22,683 sq. m | Phase 1 – 36,800 sq. m Phase 2 – 56,800 sq. m Phase 3 – 90,400 sq. m |
| Apron | 74,250 sq. m | Phase 2 – 130,000 sq. m Phase 3 – 180,000 sq. m |
| Design Capacity | ~3.2 M passengers | 6.7 M passengers (2025) 10.9 M passengers (2035) 17.9 M passengers (2045) |



Boracay Airport

- The first airport PPP
- In 2011 San Miguel took over as Concessionaire
- Development projects to be carried out include:
 - Construction of a new passenger terminal building
 - Runway extension to 2.1-km.



Puerto Princesa International Airport

- KEXIM-funded construction of a new terminal at the same site of the existing airport
- Construction commenced in August 2014
- Completion by April/May 2017



San Vicente Airport



- Ongoing runway expansion project, completing removal of hill obstruction;
- Intended to serve as a gateway to major tourist destinations in Palawan
 - San Vicente
 - El Nido

Busuanga Airport



- Procurement of DED under way
- Construction of new 2,100km runway targeted by 2019.
- Open to unsolicited proposals

End

