

Department of Transportation
Building Better & More

Highlights

- I agree with the conclusions and policy insights of the discussion paper.

Benchmark-based Goal-setting

Goals by 2028:

- **More than a third of provinces w/ investment-approved railways.**
29/81 (35.8%)
- **One (1) metropolitan railway under construction per metropolitan area.**
(e.g. Metro Cebu, Metro Davao, Metro CdO, Metro Cavite)
- **800 kilometers of new inter-regional railways with investment-approval.**
(e.g. Ilocos Railway (~450 km), Cagayan Railway (~284 km))

Catch-up

2016-2028

Regionally-competitive

2028-2040

Globally-competitive

2040+

Executive Summary

Railway Category

Inter-Regional Railways

- Connects **regions and provinces** (e.x. Region IVA-Region V)
- **Passenger and Cargo**
- ~200-1,000+ km
- Types:
 - High-speed rail
 - Freight rail

Examples

- PNR Bicol
- PNR North Long Haul
- Mindanao Railway
- Panay Railway

Metropolitan Railways

- Connects a **metropolitan area** (e.x. Metro Cebu, Metro Davao)
- **Passenger** only
- Less than 200 km
- Types:
 - Commuter rail
 - Urban/metro rail

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Examples

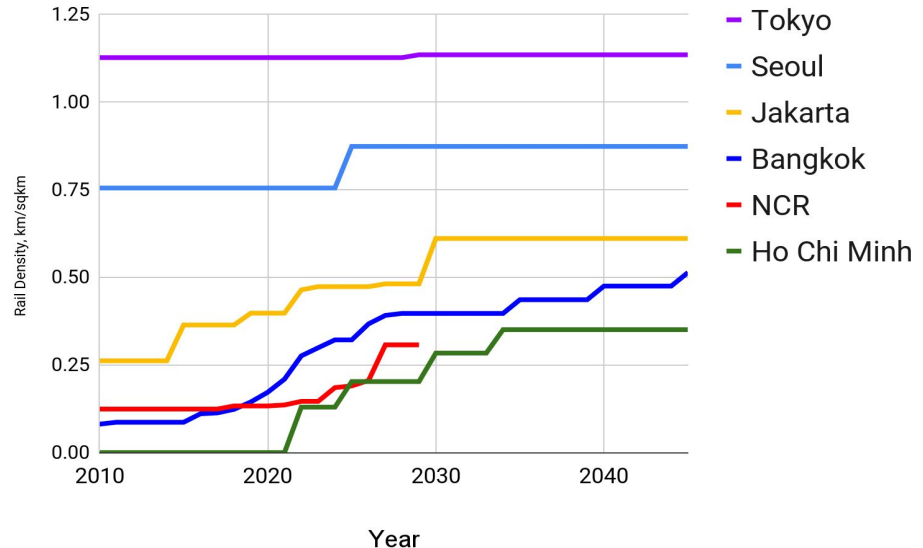
- North-South Commuter Railway
- Metro Manila Subway
- Metro Cebu Rail
- LRT-2

Metro Manila Global Ranking

- Among similarly sized and populated Asian cities, **NCR railway network is lagging and will be left behind by 2035**

Metropolitan Area	Area (sqm)	Rail Density (km/sq. km)	
		2022	By 2035
Tokyo	622	1.12	1.13
Seoul	650	0.75	0.87
Jakarta	662	0.46	0.61
Bangkok	978	0.28	0.44
Manila (NCR)	620	0.15	0.31*
Ho Chi Minh	494	0.13	0.35

*NSCR, MMSP, L4, L2WE, L2CE only; no new railways planned
Sources: JICA, ADB, World Bank, Korea MOLIT, AECOM

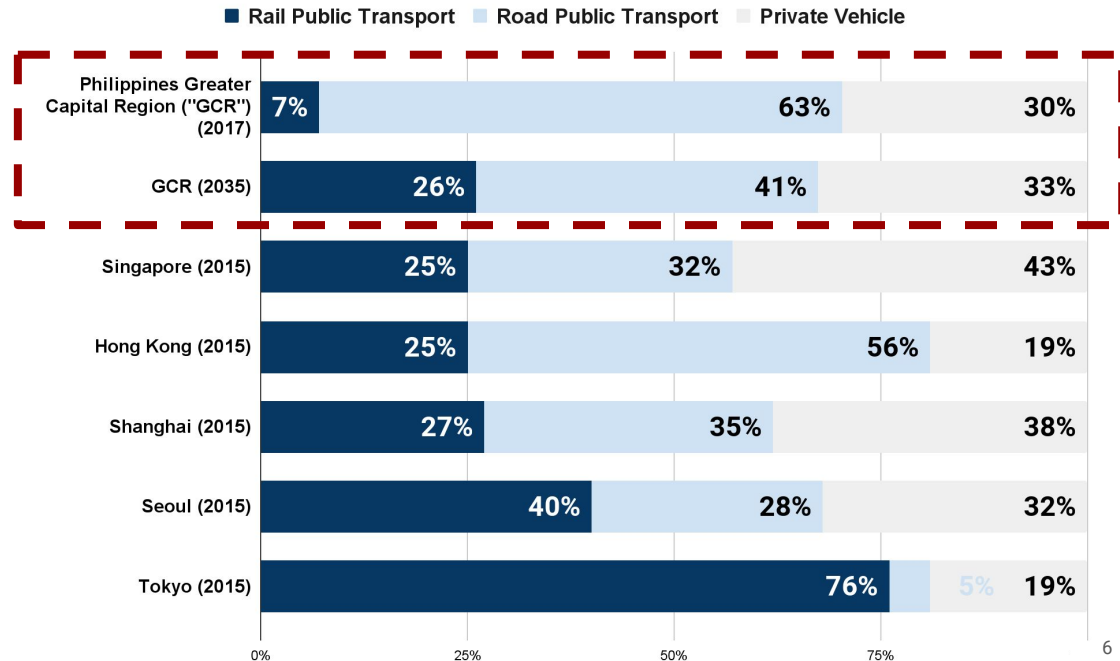


Metro Manila Global Ranking

- Rail modal share of daily trips in GCR (NCR + Bulacan, Laguna, Rizal, Cavite) lags behind other Asian cities.**

According to the 2019 Japan International Cooperation Agency (JICA) Follow-up Survey Roadmap for Transport Infrastructure Development for Greater Capital Region, the Rail Modal Share of all daily passenger trips in the Greater Capital Region will increase from 7% of all trips to 26% of all trips **if all railway projects* in the Study are implemented by 2035**

*MMSP Phase 2, Marikina, Pasig, Cavite, and Alabang-Zapote Secondary Lines
Sources: JICA, ADB, World Bank, AECOM

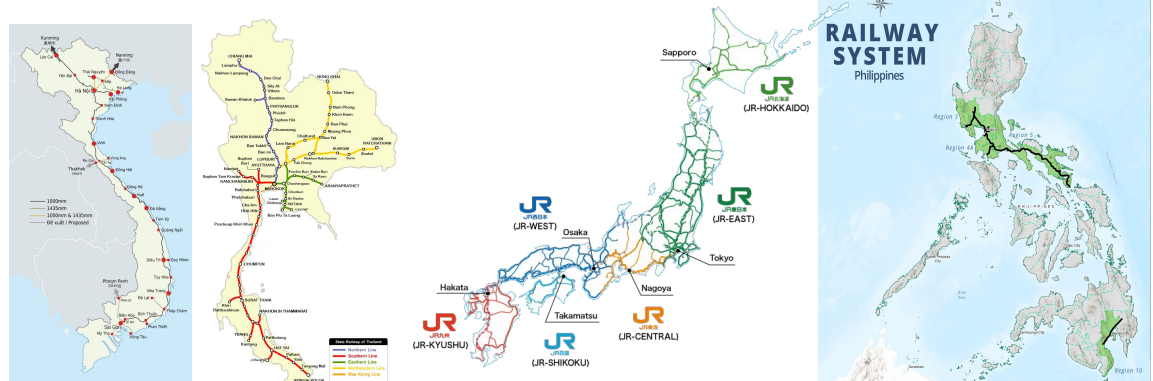


Inter-Regional Railways Coverage

- **Inter-Regional Railway** network lacks coverage compared to other similarly sized countries (incl. archipelagic countries). **Only 14 out of 81 Provinces (17.3%)** have operational or investment-approved inter-regional railways.

Country	Provinces w/ Railway	
	#	%
Japan	46*/47	97.9%
Vietnam	26/63	41.3%
Thailand	42/76	55.3%
Philippines	14/81	17.3%

*Okinawa has a monorail
Sources: JICA, ADB, MLITT

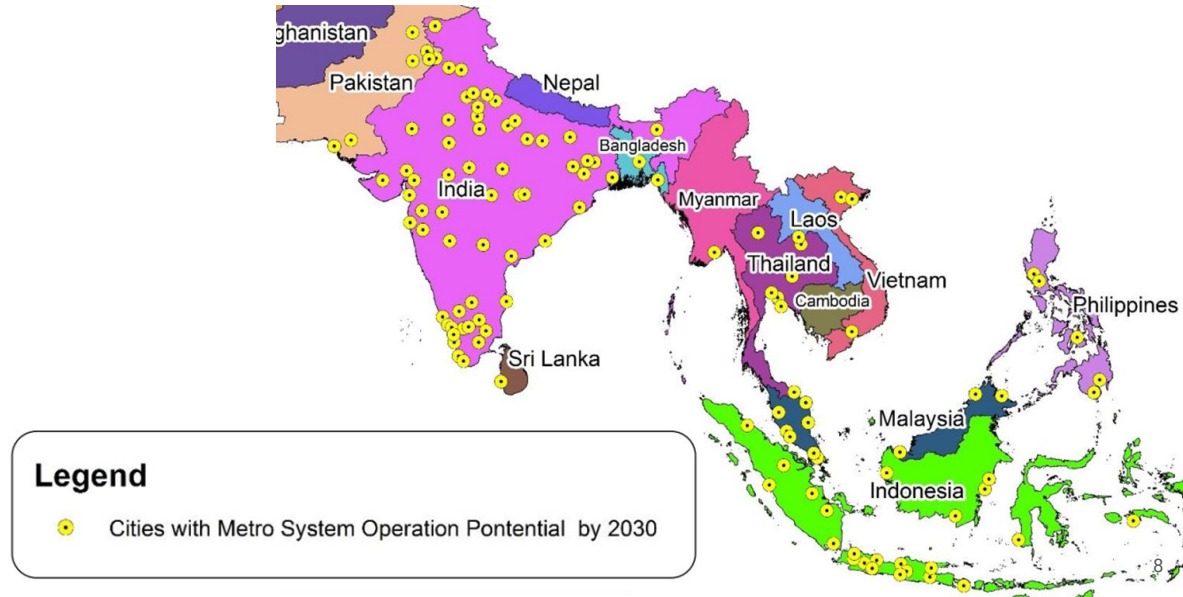


Non-Capital Cities with Metropolitan Railways

- Countries in developing Asia **are building metropolitan railways outside their capital cities.**

In a 2018 study, JICA estimated that \$ 227 Billion needs to be invested until 2030 in urban mass rapid transit systems in developing Asia

Any **metropolises with GDP >USD 5 Billion by 2030** is a prospective candidate for a **mass rapid transit system**

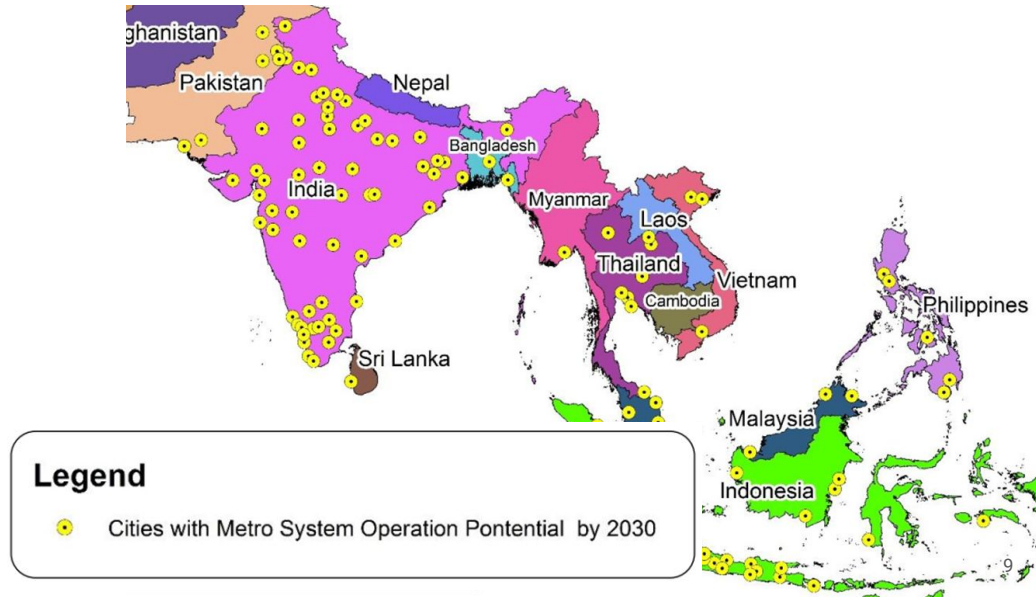


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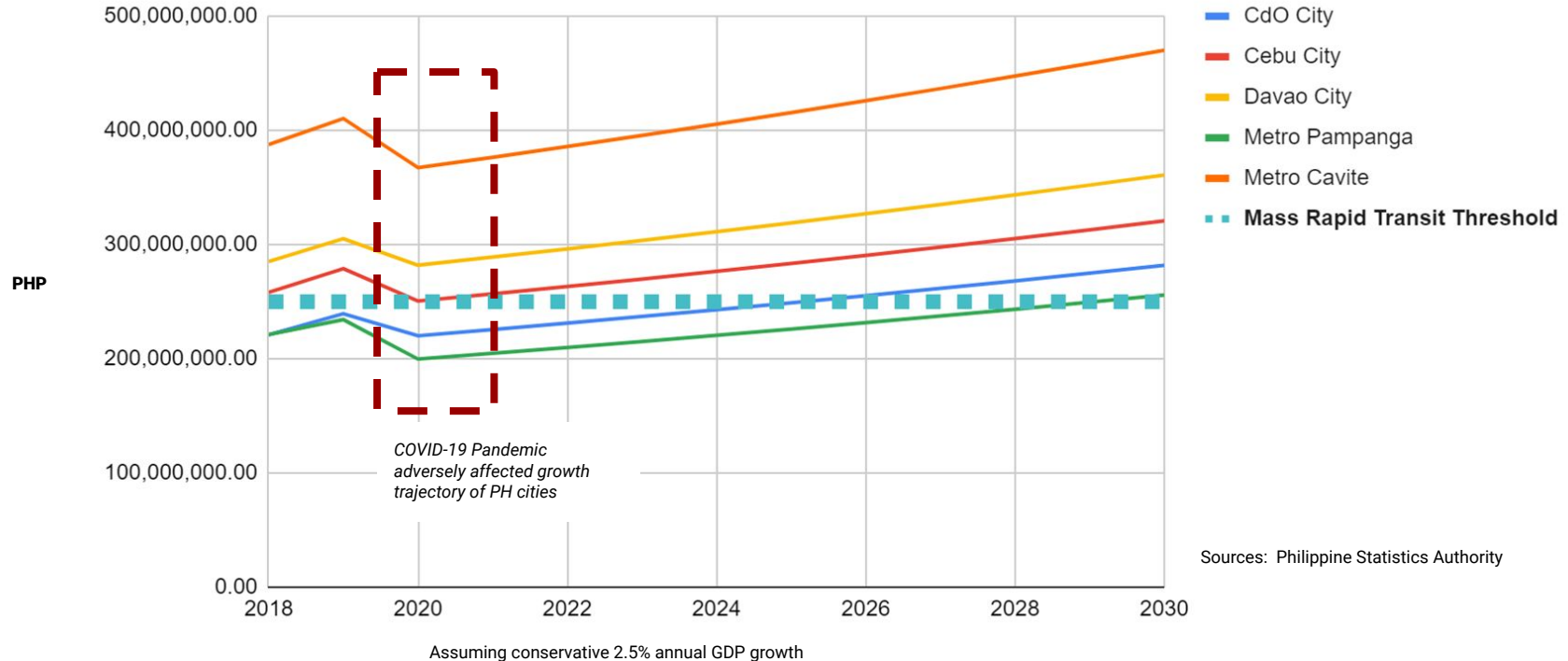
Country	Non-Capital Cities w/ Potential for Mass Rapid Transit	
	#	Investment-approved/ Operational
Indonesia	24	3
Malaysia	9	2
Vietnam	2	1
Thailand	5	1
Philippines	5	0

Sources: JICA



Non-Capital Cities with Metropolitan Railways

- At least five (5) metropolitan areas may meet 2030 threshold



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