［研究ノート］

The Current State of Philippine Infrastructure and the Government's Plans for the Future

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I Introduction

The Philippines is an archipelago experiencing rapid urbanization and an expanding population. Due to this reality, the country needs to have better infrastructure investments. According to the World Economic Forum's Global Competitiveness Report (2017), the country ranks 97th out of 137 countries in terms of infrastructure, which is lower than Indonesia's 52nd, Thailand's 43rd, Malaysia's 22nd, and Singapore's 3rd out of 137 countries. Note that the Philippines ranked 90th out of 140 in the same report last 2015 (WEF, 2015). This means that the Philippines' standing in infrastructure has deteriorated and is the worst performing country among the original ASEAN member countries.

In order to improve the country, President Rodrigo Duterte's 10 point Socioeconomic Agenda, which is also called "Dutertenomics", aims to reduce the poverty incidence in the Philippines from 21.6% in 2015 to between 13% and 15% by 2022. In order to achieve this goal, one of the reforms that were proposed is the acceleration of infrastructure projects where the government targets spending 8 to 9 trillion pesos in infrastructure projects for the years 2017 to 2022 (BUILD, 2017).

This paper will look into the current state of the different sectors of infrastructure in the Philippines and will show how the Duterte administration plans to improve them.

Ⅱ Transportation

Despite the continuing construction, upgrades and opening of new roads and bridges, the country's transportation system is still inadequate to address the ever increasing demand for it especially in major economic centers like Metro Manila. According to the National Economic and Development Authority (NEDA, 2017), 97.19% (31,242 km) of national roads, 61.80% (15,377 km) of city roads, and 28.35% (31,075 km) of provincial roads were paved and 347,160 linear meters of bridges along national roads were made permanent based on data from 2015. But even with these improvements the country still ranks 97th out of 140 countries in the World Economic Forum's Global Competitiveness Report in terms of the quality of road infrastructure (WEF, 2015). For the 2017 edition of the same report, the country fell to 104th out of 137 countries (WEF, 2017).

This decline in performance is due to the main problems that plague the transportation sector, which is enumerated by NEDA (2017): low quality public transport, traffic congestion, poor road network quality and inadequate road safety features. The public transportation system of the Philippines is commonly described as not reliable and inconvenient. This is a major cause of congestion in urban areas across the country and leads commuters to shift to private vehicle use that is further made even more attractive by low interest bank loans. This problem leads to even more road congestion, which is then a contributor to the inefficiencies in public transport, airports and seaports.

The government has made efforts to manage the traffic problem; however these efforts have failed to show any significant improvements in the transportation sector. Based on a Japan International Cooperation Agency (JICA) study (2014), the economic losses suffered by Metro Manila due to traffic congestion is estimated to be at least 2.4 billion pesos per day and if this were to be left unattended, it would worsen to 6 billion pesos per day by 2030.

The country's mass transport network has not kept up with the demand and has not affected the desired shift from private car usage to rail use. According to the World Economic Forum's Global Competitiveness Report (2015), the quality of the country's rail infrastructure network ranks 84th out of 140 countries with only 3 urban lines in Metro Manila (76.9 km) and 2 provincial lines of the Philippine National Railways (PNR) in southern Luzon are in operation.

As for the other areas of the country, there are no railways connecting different provinces and cities. Since the railroad infrastructure has not improved since the previous report, the country now ranks 91st out of 137 countries (WEF, 2017). According to NEDA (2017), the main problems of the rail network of the country are: lack of high capacity mass transportation options, problem in inter-operability (different gauge and signaling systems), congestion, and poor maintenance. The lack of mass transit options further increases the road traffic problem of the country since people are forced to use low capacity, road congesting and environmentally polluting forms of transportation that have limited access to business districts, commercial areas, industrial zones, educational institutions and government centers.

The JICA study (2014) showed that on average, low income households have to spend at least 20% of their monthly income just for transportation with the average transport fare of 42 pesos. Also because of the lack of direct routes, the average travel time of a commuter lasts 80 minutes per trip as of 2014.

For the country's civil aviation sector, according to the World Economic Forum's Global Competitiveness Report (2015), the quality of the country's air transport infrastructure network ranks 98th out of 140 countries and this has deteriorated to 124th out of 137 countries in the 2017 report (WEF, 2017). According to the Center for Asia Pacific Aviation, the approximate 10% increase per year in passenger growth for 2015 to 2017, can be attributed to the growth of the Philippine economy and the rise of the low cost carriers (Delavin, 2017). Other reasons for the increase in passenger traffic include the opening and upgrading of secondary airports to more international flights and improvements in operations and maintenance of airports.

However, air traffic congestion is still a big issue in major airports near urban centers since a majority of passengers prefer to use the Ninoy Aquino International Airport (NAIA) in Manila due to the availability of more flights, even though some passenger's origins are nearer to the Clark International Airport (CRK) in the province north of Manila. This preference of passengers, plus the lack of night time capabilities of some airports adds to the daytime airport congestion in the country's airports. In addition, the existing capacities of the airports in the country will be unable to meet the expected demand for air transport unless new facilities are developed and existing ones are upgraded to meet international practices and standards (NEDA, 2017).

In terms of the country's port system, according to the World Economic Forum's Global Competitiveness Report (2015), the quality of the country's port infrastructure network ranks 103th out of 140 countries. The 2017 report showed a decline to 114th out of 137 countries (WEF, 2017). The NEDA (2017) report argues that there is a need for improvement in the infrastructure quality and operational efficiency of the country's ports. The inefficiencies in port operations have resulted in congested access roads.

There were solutions proposed by the government to help decongest the main ports in Metro Manila by opening up services in other alternative provincial ports (Batangas and Subic). However, users still preferred the Metro Manila ports because these alternative ones have inadequate services like proximity to warehouses, shipping companies, efficient cargo acceptance and release, affordable rates, etc.

In addition, the NEDA (2017) report stated that the provision of adequate transport security is problematic given the constraints of limited assets and institutional capabilities of the concerned agencies. The Office of Transportation Security conducts training programs for security officers of different agencies to intercept and confiscate various prohibited items. However, there are still cases of lapses in security measures. At the same time, the Philippine Coast Guard was only able to respond to 95.98% of all maritime distress calls in 2015 due to them having limited patrol, response, and search and rescue capabilities since a majority of their assets are non-operational or poorly maintained.

Ⅲ Water

Despite the abundance of water resources and the different efforts to use and manage these resources, water services in the country remains inadequate due to having no apex body that would oversee the overall planning and policy implementation, which results in uncoordinated and inefficient service provisions. Universal access to water supply, sewerage and sanitation is yet to be achieved with 14.5% of families still having no access to safe water supply; 5.9% of households have no access to a basic sanitary toilet; and only 4.4% of households nationwide are served by sewerage systems in 2015. The reasons for this lack of infrastructure are due to inadequate financing, low technical capacities of small service providers, difficulty in acquiring right-of-way for sewer lines, lack of available land for water supply and waste water treatment facilities, and institutional challenges such as the lengthy processing of water permit applications.

As for irrigation, the performance of national and community irrigation systems remain low because of deterioration due to typhoons and inefficient water management practices. Also the issues of delayed fund releases, peace and order problems, right-of-way issues prevent the implementation of programs and projects. Lastly, the degradation of watersheds reduces the quantity and quality of water for irrigation by causing flooding during the rainy season and scarcity during the dry season.

The issue of flood management is now more challenging due to the impact of climate change which makes flood occurrences more frequent and intense. Another concern is the unclear description of responsibilities of local government units and the national government on the implementation, operation and management of flood management and drainage structures (NEDA, 2017).

Ⅳ Energy

The World Economic Forum's Global Competitiveness Report (2015) indicates the quality of the Philippines' quality of electricity supply ranks 89th out of 140 countries. The 2017 report showed a decline to 92nd out of 137 countries (WEF, 2017). The energy self-sufficiency level of the country according to the Department of Energy fell short of the 60% target from 2010 onwards. In 2015, the country was only able to reach 53.5%.

The problems in the distribution and provision of electricity have been held back by these: high costs of fuel and logistical support for diesel plants, low capacity and lack of willingness to pay for electricity by rural households, low technical and adsorptive capacities of some electric cooperatives, increase in the number of households demanding electricity, increase in the length of service demands from 8 hours a day to 12 hours a day, more funds needed to supply electricity to marginalized communities in off-grid areas, few private sector participants, and various institutional issues such as compliance requirements of local government units, right-of-way and peace and order situations.

The Philippines' electricity rates remain the highest in Asia mainly because there is no state subsidy for the rates of privately generated, transmitted and distributed power supply. Users are charged with additional fees like feed in tariff, universal charges, value added taxes and system losses in transmission and generation on top of their electric usage. There are other problems such as the minimal competition in the energy market, alleged market manipulation and other unforeseen disruptions in power supply (NEDA, 2017).

Ⅴ Information and Communications Technology

Despite the increase in service coverage (cellular mobile 99.38% and broadband internet 76.44% of cities

and municipalities), the information and communications technology infrastructure of the Philippines is still inadequate and pales in comparison with other economies in Asia in terms of quality and subscription (NEDA, 2017). The country's average internet connection speed is at 5.5 Mbps as of the 1st quarter of 2017 which is the slowest among the surveyed 15 Asia Pacific countries (Akamai, 2017).

Although the Philippines currently is the lowest ranking among Asia Pacific countries, President Duterte has approved a plan to deploy a national broadband network at an estimated cost of 70 billion to 200 billion pesos. The network will be used to host a national portal and other online government services, as well as to connect remote areas of the country that are underserved by existing broadband providers (Jiao, 2017).

Ⅵ Social Infrastructure

Social infrastructure such as housing, education, health and solid waste management facilities has increased in the past years but still remains inadequate to meet the growing demand. NEDA's (2017) report highlights these issues. The housing sector's needs remain large despite the efforts of housing agencies. For 2011 to 2016, an estimated 5.55 million households were in need of housing facilities and this is expected to increase to 6.8 million for 2017 to 2022 due to households affected by natural calamities and infrastructure project affected families due to the expected accelerated infrastructure spending.

The major challenges of this sector are as follows: lack of affordable land, reluctance of local government units to accept informal sector families, cumbersome bureaucratic processes, inadequate or delays in provision of basic services and institutional limitations of national and local government units to fulfill their respective roles in providing decent shelter.

For the education sector, the government was able to reduce classroom to student ratio from 1:39 in 2010 to 1:34 in 2014 for the primary level and from 1:54 to 1:48 for the secondary level in the same period. However, these numbers fell short of the targets of 1:32 for the primary level and 1:47 for the secondary level. While the overall number of hospitals and health facilities constructed or upgraded has increased to 29,018 units, several local government units were unable to provide the necessary resources to keep those infrastructures functional due to lack of financial support, human resources and equipment.

As for low compliance of local government units with the Ecological Solid Waste Management Act leading to a majority of local areas still not served by solid waste management facilities or material recovery facilities. The problems faced by this sector are: political factors that render the clustering of sanitary landfills not feasible and unsustainable, availability and social acceptability problems in the selection of landfills, technological constraints arising from existing legal issuances, lack of data on markets for recyclable materials and limited awareness of the general public in waste segregation and recycling, recovery and composting technologies.

Ⅶ Strategies of the Government

In order to address all of the problems enumerated above, The NEDA (2017) report stated the government strategies to improve the infrastructure sector by increasing spending on public infrastructure from 5.3% of the GDP in 2017 to 7.4% of the GDP in 2022. In order to achieve this, linkages between government offices would be established to streamline the process of improving the infrastructure of the country from the formulation of master plans and road maps up until the implementation of projects.

The government would also encourage more private sector participation in the aspects of financing, construction, operations and maintenance of infrastructure projects by lessening the bottlenecks in planning and implementation. For each individual

sector, these are the strategies listed in the same report.

The government wants to emphasize the connectivity of transport terminals to allow passengers and freight to smoothly transfer between different modes of transport for both urban and rural areas. The expansion of the transport network through flagship projects will be implemented alongside the identification of new economic centers. For the road based transport, there will be an increase in infrastructure to improve road standards, connect regions, and emphasize higher quality public transport. For rail transport, the rail network will be expanded and same standards would be used to allow inter-operability of railroads.

For air transport, there are plans to build a new international airport and develop a fast rail access to the city from the airport. Also regional airports will be further developed with night time capabilities to allow more airplanes to land anytime of the day. For the port system, there are plans to improve the RORO network, construct breakwater facilities, and expansion of port facilities to accommodate larger vessels. Also, a more direct connection between the Manila and Batangas ports will be explored. For the safety and security of the public transport system, the government aims to create an independent body that would investigate traffic accidents and provide transport safety recommendations.

In the meantime, the Office of Transportation Security will continue to ensure public safety through inspections, procurement and installation of advanced security systems for transport terminals. As for the Philippine Coast Guard, they will pursue capability building programs by procuring more air and sea vessels, training personnel and developing new bases in strategic locations.

The primary strategy of the government for the water resources sector to address the fragmented structure of this sector is through the creation of an apex body to achieve coordination among the different institutions in the country. The national government will help in developing and managing water related projects, while the local and regional agents will be given the capacity to hasten the processing of water permits. Existing laws and regulations on water resources will be reviewed and strengthened. To ensure water security, new water sources will be developed, watersheds will be protected, and sewerage and sanitation infrastructure will be expanded. An irrigation master plan will also be formulated which aims to prioritize small community based irrigation projects. Flood management initiatives will also be taken by upgrading existing and completing new flood control infrastructures.

As for power generation, the government will support massive investments and fast track implementation of infrastructure projects. They will study the optimal mix of energy sources to help increase the country's supply of electricity like pursuing the development of the natural gas industry, reviewing the alternative fuels for transportation, and continuing the implementation of the Energy Efficiency and Conservation Program. Competition will also be encouraged to drive down electricity costs. There will be improvements in the transmission of electricity across the different islands in the country and interconnect the entire electric grid. Alongside this, the government plans to achieve total household electrification by 2022.

For information and communication technology infrastructure of the country, the government will expand the deployment of infrastructure and address the gaps in digital connectivity to meet the growing demand for services in underserved areas. The government also plans to continue to enhance the country's e-government system as a vital tool for good governance.

The government plans for social infrastructure are as follows. The Housing and Urban Development Coordinating Council together with the local government units plans to ensure the timely provision

of decent shelter to the underprivileged and homeless families. In order to address the infrastructure deficit in the education sector, the Department of Education will build 47,492 new classrooms in 2017 and school buildings will be provided with important facilities such as power, information and communication technology, water and sanitation facilities.

For better provision of health services, the Department of Health plans to upgrade and expand public hospitals, medical centers and health centers especially in the rural areas. For compliance with the requirements of the Ecological Solid Waste and Management Act, there will be public awareness programs to promote proper waste management and investments in necessary technologies to improve solid waste management throughout the country.

Ⅷ Flagship Infrastructure Projects

The NEDA board chaired by President Duterte approved the adoption of 75 high impact infrastructure flagship projects during the board's meeting last June 27, 2017. Among the 75 flagship projects, 8 projects are funded by Japan's Official Development Assistance (ODA). These are:

(1) Philippine National Railways (PNR) North 2 (Malolos-Clark Airport-Clark Green City Rail) for the National Capital Region (NCR) and Region 3, this is 69.5 km railway that will extend PNR North 1, connecting NCR with Clark City. The project will enable a one-way travel time of 56 minutes between Manila and Clark International Airport (CRK), supporting the development of CRK as a major air transport hub. PNR North 2 will be seamlessly integrated with PNR North 1 and PNR South Commuter. PNR North 2 will be an electrified, fully elevated, standard-gauge railway (BUILD, 2017);

(2) Cavite Industrial Area Flood Management Project for Region 4-A, this project's objective is to mitigate flood damages in Cavite Province by implementing flood risk mitigation measures (JICA, nd);

(3) Malitubog-Maridagao Irrigation Project Phase 2 for the Autonomous Region in Muslim Mindanao and Region 12, this will irrigate more than 10,000 hectares of agricultural fields and will benefit more than 50 barangays in North Cotabato and Maguindanao (NIA, 2016);

(4) Manila Metro Line 9 (Mega Manila Subway Project Phase 1) for NCR, this is a 25 km underground mass transportation system connecting major business districts and government centers in NCR. It is expected to serve around 370,000 passengers per day in its opening year (BUILD, 2017);

(5) Improvement of the remaining sections along Pasig River from Delpan Bridge to Napindan Channel for NCR, the channel improvement works consist of revetments with parapet walls (8.02 km), parapet walls (2.90 km), repair of existing revetment (0.80 km), riverbank excavation (6.20 km), riprap (6.20 km), drainage outlet (200 locations), dredging works (960,000 cu. m), dike embankment & road (1.82 km), drainage improvement (1.82 km), sluice structures (9 locations), bridge foundation protection (4 locations) at remaining sections of Pasig River and priority critical sections of Lower Marikina River (BUILD, 2017);

(6) Circumferential Road 3 Missing Link Project for NCR, this is an 8.3 km road that would be another alternative to EDSA for those traveling between Quezon City and Makati that would shorten the travel time from 1 hour to 15 minutes (ABS-CBN News, 2012);

(7) Road Network Development Project in Conflict Affected Areas in Mindanao for Regions 9, 10, 11, 12 and 13, this project's objective is to improve logistics, stimulate economic activity and strengthen the connectivity in conflict affected areas in Mindanao by constructing and upgrading roads and bridges (JICA, nd); and

(8) Dalton Pass East Alignment Alternative Road Project (East Dalton Bypass Project) for Regions 2 and 3, this is intended to serve as alternate route in the treacherous, landslide prone Dalton Pass which would include 60 km of road networks and 1.5 km mountain

tunneling works between the provinces of Nueva Ecija and Nueva Vizcaya. Once completed, it would be the first ever mountain tunnel project in the country (Domingo, 2017).

The remaining flagship infrastructure projects will either be funded by the Philippine government's domestic financing under the General Appropriations Act, Public-Private Partnership between the government and private companies, ODA from individual countries like China and South Korea; and international organizations like the World Bank. These other projects will consist of railways, roads and bridges, airports, fish and container ports, dams, irrigation, flood management, housing and commercial centers, and hydroelectric plants throughout the entire Philippines to address the need for more infrastructure in the country (NEDA, 2017).

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［付記］

本研究ノートは、デラサール大学経済学部リム・レイと中央学院大学商学部鷲尾紀吉との共同研究の成果である。共同研究に当たっては、論文のテーマ、内容等について議論の上、鷲尾が提案し、それに基づいて、最初の原稿（英文）をリム・レイが執筆した。双方でその内容をチェックして最終原稿とし、その概要（日本語）は鷲尾がまとめた。

フィリピンにおけるインフラの現状と政府の将来計画

［概要］
フィリピンは、急速に都市化が進み、人口が増加している群島からなっているため、より一層良いインフラ投資が必要となる。世界経済フォーラムグローバル競争力レポート（WEF2017）によれば、本国は、インフラの点で137か国中97位にランクされ、インドネシアの52位、タイの43位、マレーシアの22位、シンガポールの３位よりも低く、原アセアン諸国の中で最も悪い状況である。
これを改善するため、ドゥテルテ大統領は、「ドゥテルテノミクス」と呼ばれる10項目の社会経済課題を提出し、本国の貧困率を2015年の21.6% から2022年までに13% から15% の間に縮小する目標を立てた。この目標を達成するため改革の１つに、政府は2022年までにインフラプロジェクトに８兆から９兆ペソを支出し、インフラプロジェクトを加速することとしている。主要なインフラプロジェクトの対象としては、以下のものがあげられる。
（1）交通インフラ
道路や橋の工事、改良、新設などを継続的に行っているにもかかわらず、本国の交通システムは、首都マニラのような主要経済センターにおける需要増加に対処するには依然として不十分である。道路インフラの質は137か国中104位にランクされており、民間航空部門でも航空輸送インフラネットワークは同じく124位にランクされている（WEF2017）。２番目の空港も整備されてきたが、多くの乗客はフライトの利便性からニイノ・アキノ国際空港を利用するので、空港交通混雑は依然として大きな問題となっている。海港インフラネットワークの質も悪く（137カ国中114位。WEF2017）、これが道路アクセスへの混雑を引き起こしている。
（2）水インフラ
本国の水資源は豊富であり、水資源を管理・利用する努力をしているにもかかわらず、水供給サービスは計画全般と政策実行を管理する統合的な組織を持たないため、不十分のままであり、その結果、未調整で非効率な水供給サービスとなっている。また、国家や地域の灌漑システムは台風や非効率な水管理によって低い水準のままである。
（3）エネルギーインフラ
本国における電力供給の質は137か国中92位である（WEF2017）。電力の流通と供給問題は、燃料の高コストとディーゼル設備へのロジスティクス問題、電力協同組合の低い技術・吸着能力、家庭の電力量と電力使用時間の増加、民間電力部門の少なさ等に起因している。
（4）ICT インフラ
都市部のセルラーモバイル、ブロードバンドのサービス範囲はそれぞれ99.4％、76.4％となっているが、インターネットの接続スピードは5.5Mps でアジア太平洋15カ国中最も遅い。ドゥテルテ大統領は700億ペソから２兆ペソを投じて、遠隔地や地方にもブロードバンドを配置する計画である。
以上のようなインフラ問題に取り組むために、ドゥテルテ大統領が議長を務める国家経済発展局（NEDA）は75のインフラ整備プロジェクトを承認した（うち８プロジェクトは日本の ODA の支援）。いくつかの具体的な主要整備プロジェクトには以下のものがあげられる。
（1）フィリピン国鉄（PNR）プロジェクトは、クラーク市まで延長し、これによりマニラとクラーク国際空港を片道56分で結ばれる。
（2）カビテ工業地域洪水管理プロジェクトは、カビテ州における洪水被害を緩和する。
（3）マルチュボグ－マリダガオ灌漑プロジェクトは、10,000ヘクタール以上の農地について灌漑する。
（4）大マニラ地下鉄プロジェクトは、主要なビジネス街と政府地区の間25㎞を接続し、開通時には一日約37万人の乗降客を見込む。
（5）環状３号線の8.3㎞プロジェクトは、エドサを通過しないで、ケソン市とマカティ市の間を１時間から15分に短縮する。
（6）ミンダナオの紛争地における道路ネットワーク開発プロジェクトは、道路や橋の建設、改良等によって、ロジスティクスを改善し、経済活動を刺激し、地区内の接続性を強化する。
この他のインフラ整備プロジェクトは、国内および国外（中国や韓国からの ODA、世銀等）からの資金調達によって、国中のより多くのインフラ整備を行うこととしている。