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**PHILIPPINES AVIATION SYSTEMS PLAN - A CASE STUDY**

The Aviation Systems Plan for the Philippines was created as a result of the air sector study component of the Philippines Transport Strategy Study (PTSS), sponsored by the Asian Development Bank in 1996-97. Carried out under the auspices of the National Economic and Development Authority of the Philippines, the study examined all elements of the air sector in the Philippines, covering the regulation of air transport, demand for air travel, supply of services by the domestic and international airlines, and all supporting infrastructure, such as the airline operators themselves, the national airports, air traffic control, and the air navigation system. Comprehensive review of the air sector revealed that the initial liberalisation of air transport in the mid-1990's had created rather too many new domestic airlines, all of which chose to compete on the limited profitable routes to the detriment of all. At the same time the national carrier suffered major erosion of its market, and being unable to withstand the new highly competitive environment began to incur large financial losses. As far as the infrastructure was concerned, the nation's 84 government-owned airports had been starved of capital and were in very many cases sub-standard in terms of function, and below required safety standards. One major issue at the time of the study, and no less so today, is the question of the future of Manila's Ninoy Aquino International Airport (NAIA), and the need to either supplement its capacity or replace the airport in the relatively near future.

The paper reports on the review of the air sector in the Philippines, describes the physical and policy needs of air transport to service future travel demand, defines a future classification system for the national airports, and proposes a prioritisation of airports for capital upgrading to meet air transport, regional development, and safety needs. Discussion of the Manila NAIA issue and the various options for providing airport capacity for the national capital is provided in the paper along with analysis of the proposals to add terminal capacity on the present site, and to develop Clark Air Base in Angeles. The future development of the air navigation and ATC system is addressed, and a restructured civil aviation administration proposed. The paper also examines the effect of the Asian downturn on air transport in the Philippines, and actions taken subsequent to the study to upgrade air transport operations and the national airports.

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