

Training Program for High-Level Officials
Knowledge Sharing of Korea's Experiences on Infrastructure Development



URBAN PLANNING AND HOUSING
SECTOR OF MYANMAR

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Ministry of Construction
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ADVANTAGE OF GEO-POLITICAL LOCATION



The Biggest Land Mass Country in Southeast Asia

Neighboring Countries: China – 1.3 billion
 India – 1.2 billion
 ASEAN – 0.6 billion
 Bangladesh – 0.2 billion

Area – 678500 sq.km (Land Area – 657740 sq.km)

Length of Costal line – 1385 miles

Population Total – 60 million, Labor Force – 37.35 million





URBAN CENTRE CLASSIFICATION AND POPULATION

Urban Population -30%, Rural Population- 70%

Class of Urban Centers (population)	2010	2020	2030
> 1,000,000	1	2	2
500,001-1,000,000	-	1	2
100,001-500,000	28	41	61
50,001-100,000	51	62	69
25,001-50,000	67	82	89
10,001-25,000	106	94	73
<10,000	110	82	68
	365	365	365

Population (Union) – 80 to 90 millions (2030) (estimated)

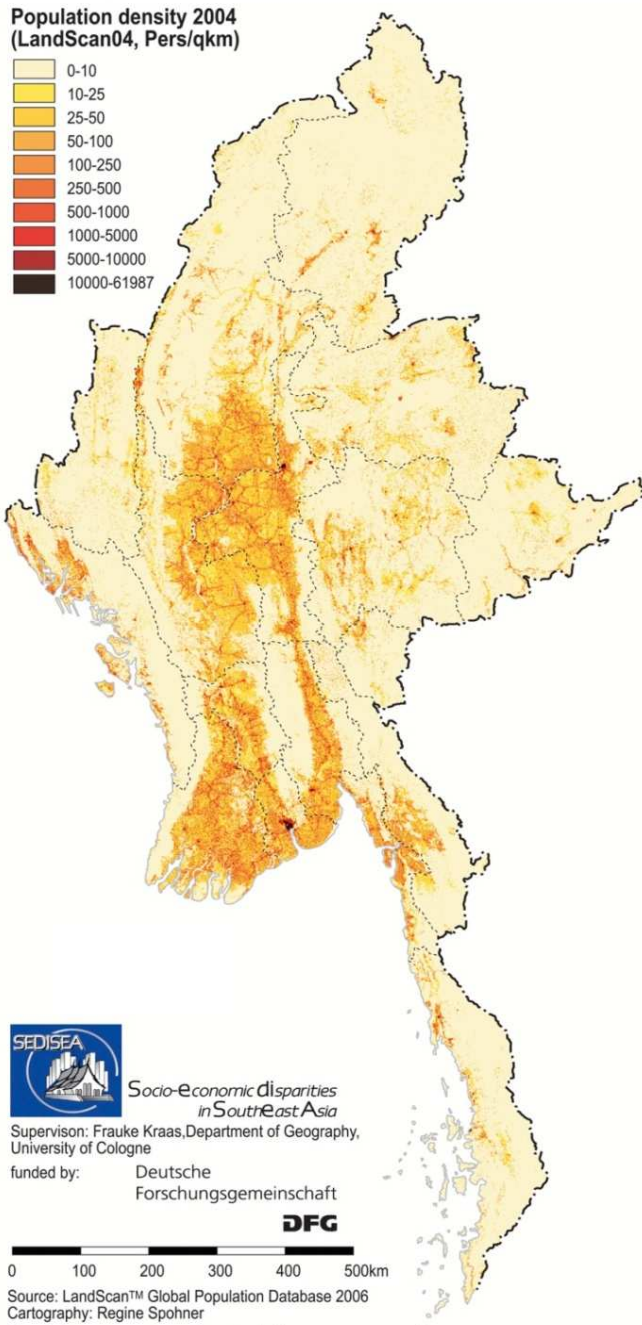
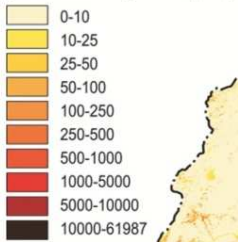
Prime Cities Development and Significantly Increased Population in Secondary Urban Centers

Issues on Urban Land Requirement & Housing Needs

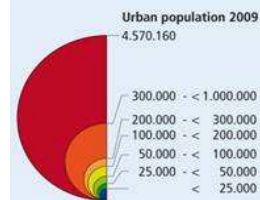
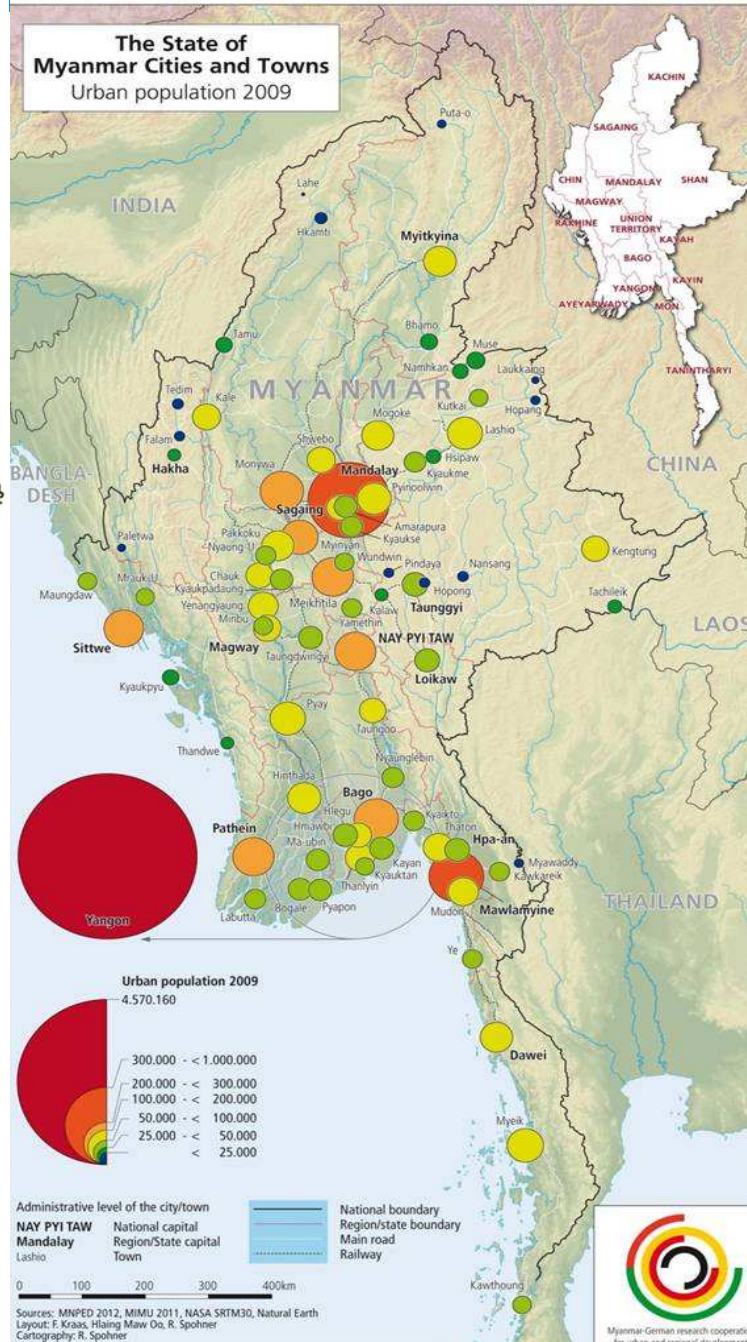
Issues on Proper Urban Planning & Sustainable Urban Development

DISTRIBUTION OF POPULATION AND URBAN CENTERS

Population density 2004
(LandScan04, Pers/qkm)



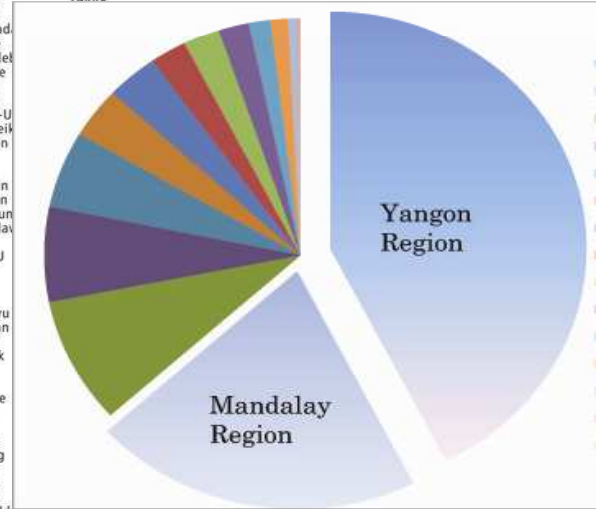
The State of Myanmar Cities and Towns
Urban population 2009



City/town ranking related to urban population 2009

1	Yangon	4570160
2	Mandalay	963350
3	Mawlamyine	435422
4	Bago	283786
5	Monywa	271906
6	Meiktila	252294
7	Patheingyi	249961
8	Nay Pyi Taw	244863
9	Sittwe	224899
10	Myingyan	202063
11	Myeik	192525
12	Pyaw	184124
13	Lashio	179190
14	Pyin Oolwin	166768
15	Hinthada	163226
16	Myittha	154334
17	Pakokku	152409
18	Dawei	151865
19	Mogoke	150512
20	Mudon	134491
21	Thant	133158
22	Yenangyaung	132731
23	Thanlyin	127719
24	Kale	117517
25	Shwabo	116518
26	Magway	116407
27	Kengtung	109483
28	Chaung	109098
29	Hlegu	104277
30	Sagaing	103186
31	Taungtha	102600
32	Taunggyi	97305
33	Loikaw	92116
34	Hpa-An	90668
35	Hmawbi	89647
36	Kayan	86648
37	Taungtha	84145
38	Bogale	83371
39	Amarapura	80049
40	Maubin	70448
41	Pyaw	
42	Kyaukpadaung	
43	Kyaukse	
44	Nyaung-U	
45	Kyaukse	
46	Kyaukse	
47	Labutta	
48	Nyaung-U	
49	Kawkaikhe	
50	Yamethin	
51	Ye	
52	Minbu	
53	Wundwin	
54	Kyauktan	
55	Kawthoun	
56	Maungdaw	
57	Kurkai	
58	Mrauk-U	
59	Muse	
60	Bhamo	
61	Tamu	
62	Kyaukpadaung	
63	Namhkan	
64	Hsipaw	
65	Tachileik	
66	Kalaw	
67	Hakha	
68	Thandwe	
69	Hkamti	
70	Tedim	
71	Hopong	
72	Nansang	
73	Falam	
74	Pindaya	
75	Hopang	133928
76	Myawaddy	12478
77	Putao	10199
78	Paletwa	8315
79	Laukaing (calc.)	2009
80	Lahe	

Distribution of large size private industries in 2009

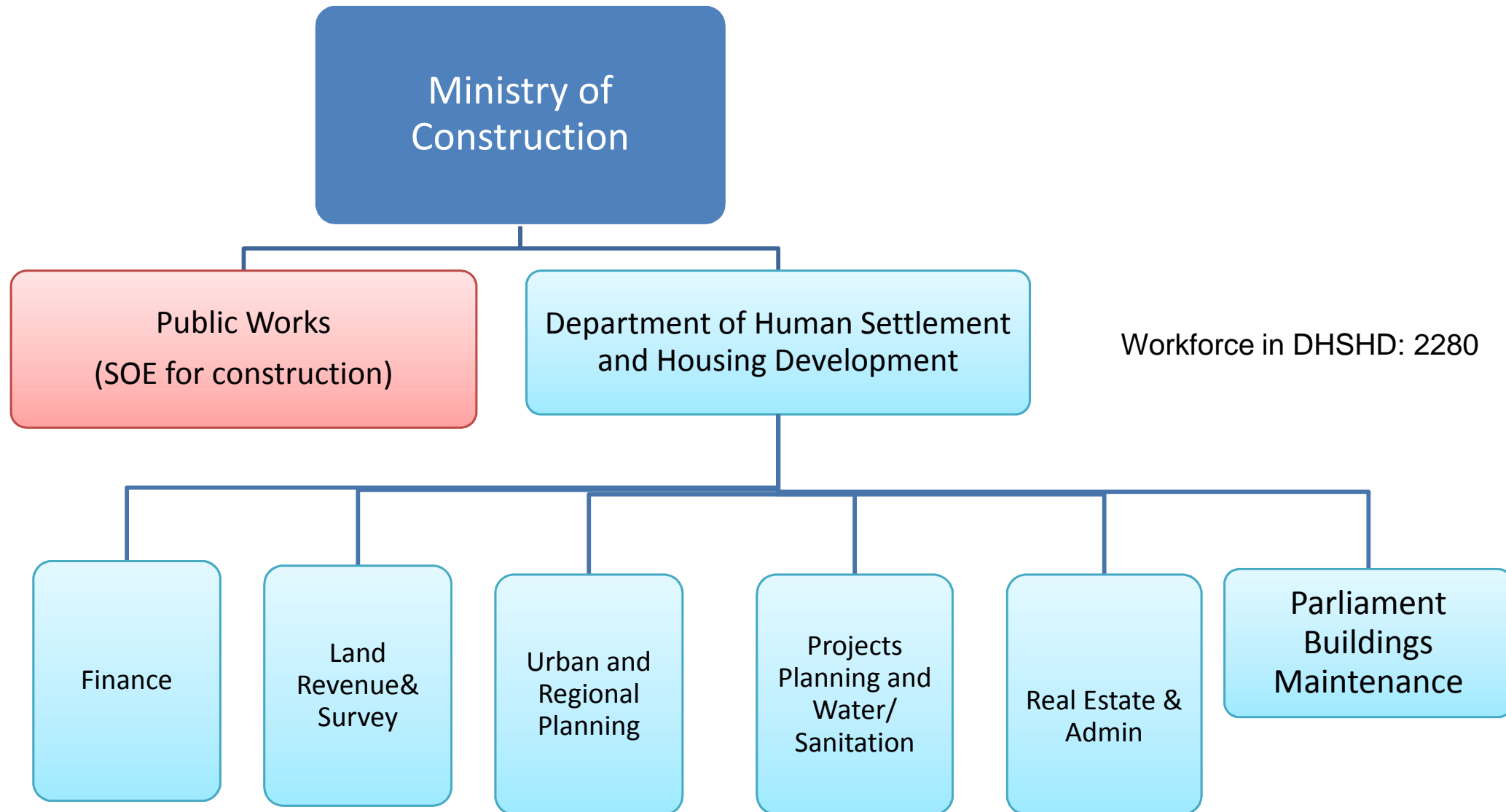


SEDISEA
Socio-economic Disparities in South East Asia
Supervision: Frauke Kraas, Department of Geography, University of Cologne
funded by: Deutsche Forschungsgemeinschaft
DFG
0 100 200 300 400 500km
Source: LandScan™ Global Population Database 2006
Cartography: Regine Spohner
Boundaries are not necessarily authoritative.



Source: Kudo T., Kumagai S. [2012]
"Two Polar Growth Strategy in Myanmar: Seeking 'High' and 'Balanced' Development"
IDE Discussion Paper No. 371

Organization Chart of Department of Human Settlement and Housing Development (DHSHD)





- Urban and regional planning to support systematic development of cities.
- Planning , implementation and provision of adequate housing based on affordability.

Housing Development Process & Changes



**Shelter/Space
Local needs**

Post-Independent
Public Housing
Social needs
1951 NHB Act
**Satellite Town
Development**




**Satellite Towns ,
Industrial zones &
Housing
Development**



**Colonization
& Urbanization**
Pre-Independent

**Housing Department
(1972)**



**DHSHD
(1990)**

**Market
Orientation &
PPP in Housing**



**Private Sector
Participation in
Housing Delivery**

Lack of Housing Policy for Low income people and Rural Housing Needs



**Un-sustainable Provision and Delivery System in Public Housing
Lack of integrated Land use and Transport Planning**

COUNTRY EXISTING SITUATION

Myanmar in Transition

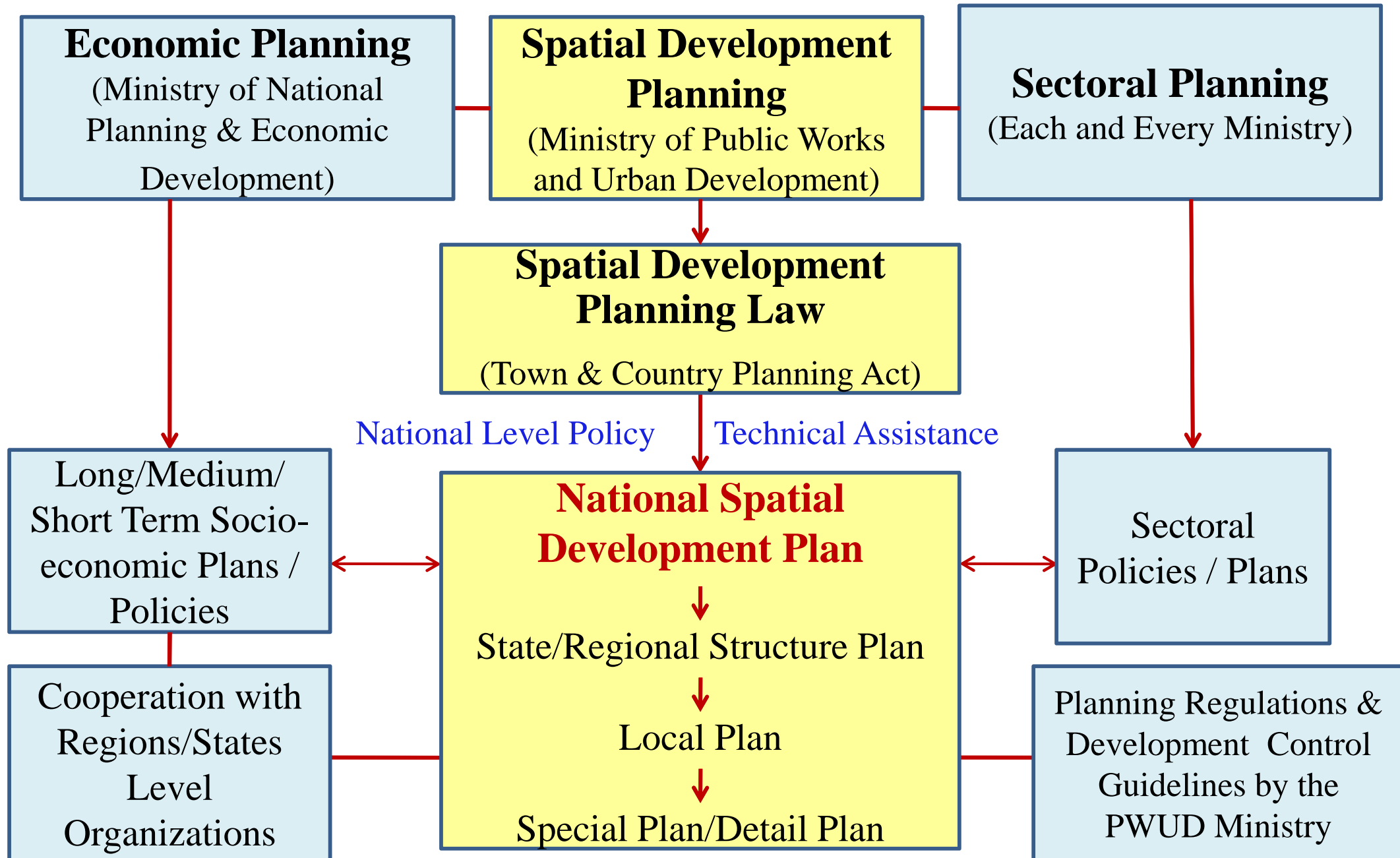
The New Government has build up and broaden on a path of democratic and market oriented economic reforms.(2011, March)

- **Political reform**
- **Economic reforms**
- **Administrative Reforms**
- **Restructuring of Public Sector and Private Sector Development**

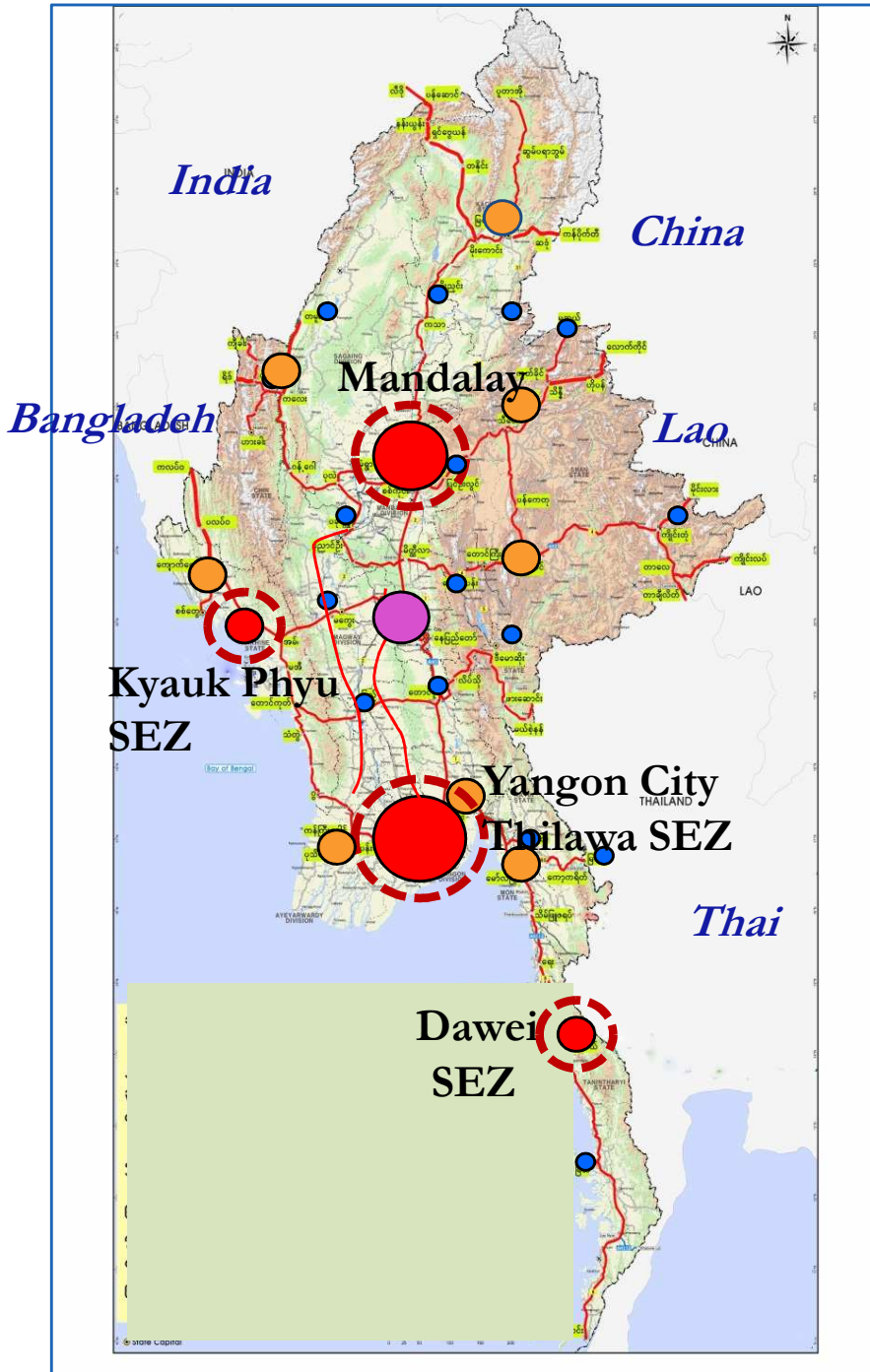
Reform Strategy with people centered approach

- **Drafting on National Comprehensive Development Plan**
- **Socio-Economic Development Policies**
- **Urban Planning and Development Policy**

Spatial Development Planning System



THE DEVELOPMENT STRATEGY OF CONCENTRATED DECENTRALIZATION



● Capital City
(Administrative, Transport & Logistic Hub)

⊙ National Economic Growth Centre
(SEZ, Port, Int. Airport, Trading, Financial)

● Secondary Regional Growth center

● Other Growth center

Town with more then 50000 inhabitants

Main Corridor

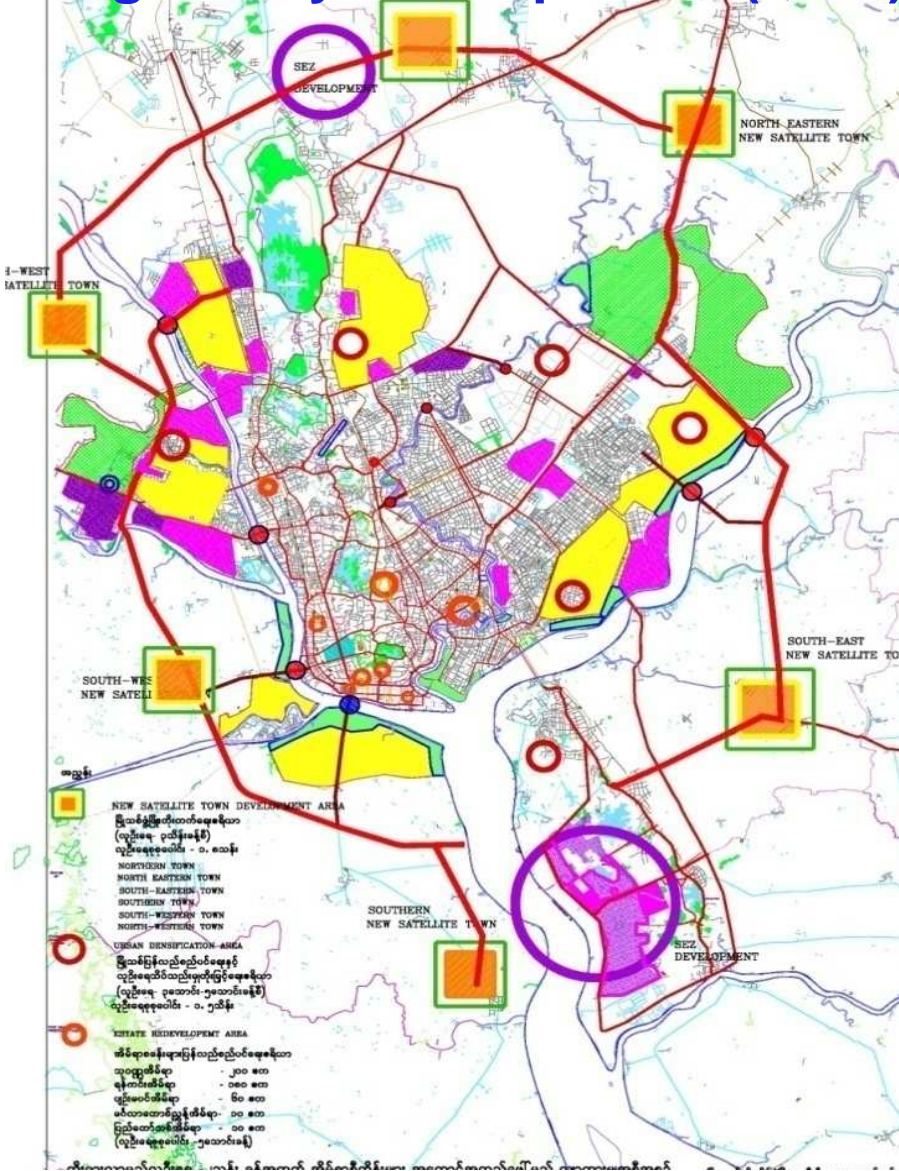
Emerging Corridor

Major Communication Axis

Comprehensive Development Plan

Proposed Yangon City Urban Development Plan . DHSHD. MOC

Yangon City Concept Plan (2040)



YANGON CITY ECONOMIC HUB & DEVELOPMENT POLE

Area - 598.75 sq-km
Population (2010)- 5.0 - 7.023 million
Population (2040) - 10 – 12 million
Growth Rate - 1.69 % (2010)

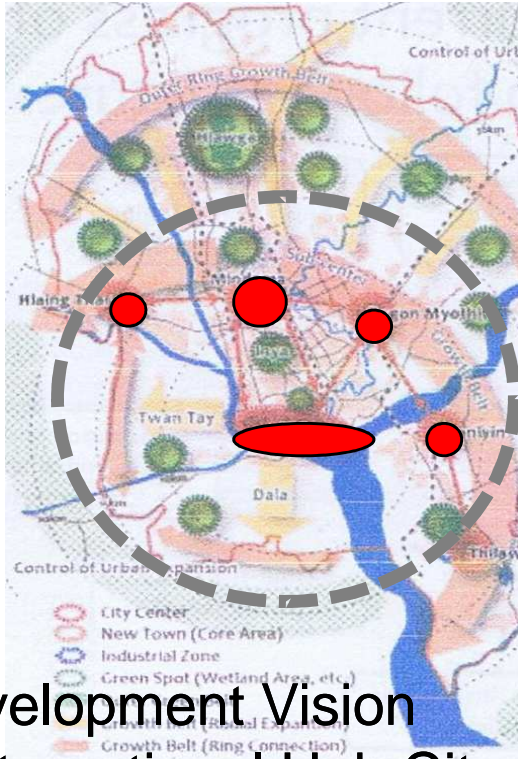


Housing Development Plan (2040)

- Designate Development Promotion Area in Smaller Urban centers around Yangon
- Urban Intensification Area through Upgrading
- Existing Estate Redevelopment Area

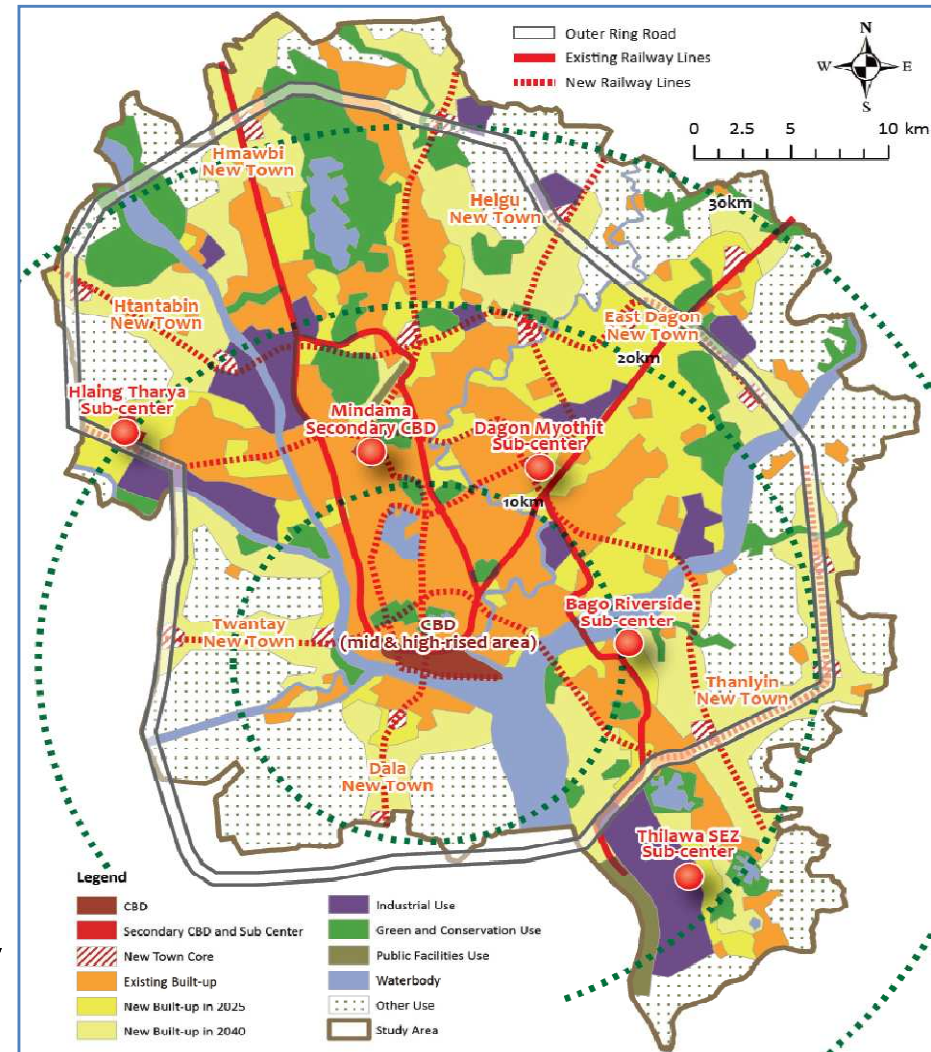
URBAN DEVELOPMENT MASTER PLAN(JICA)

■ FUTURE URBAN STRUCTURE AND LAND USE



Development Vision

- International Hub City
- Comfortable City
- Well Managed Infrastructure City
- City of Good Governance

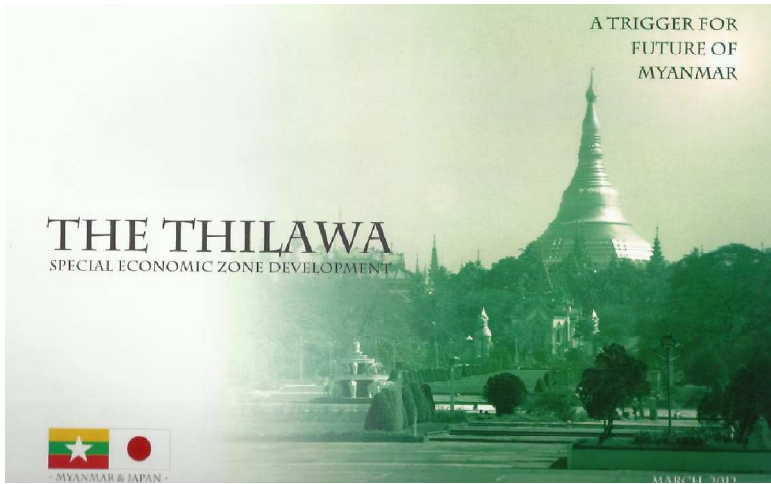


The Development of New Areas (Mayor's Comment)

Yangon in 2040 could be around 500 square miles or around 1300 kilometres, with population of around 11.5 million, a city with around 6 million labour forces.

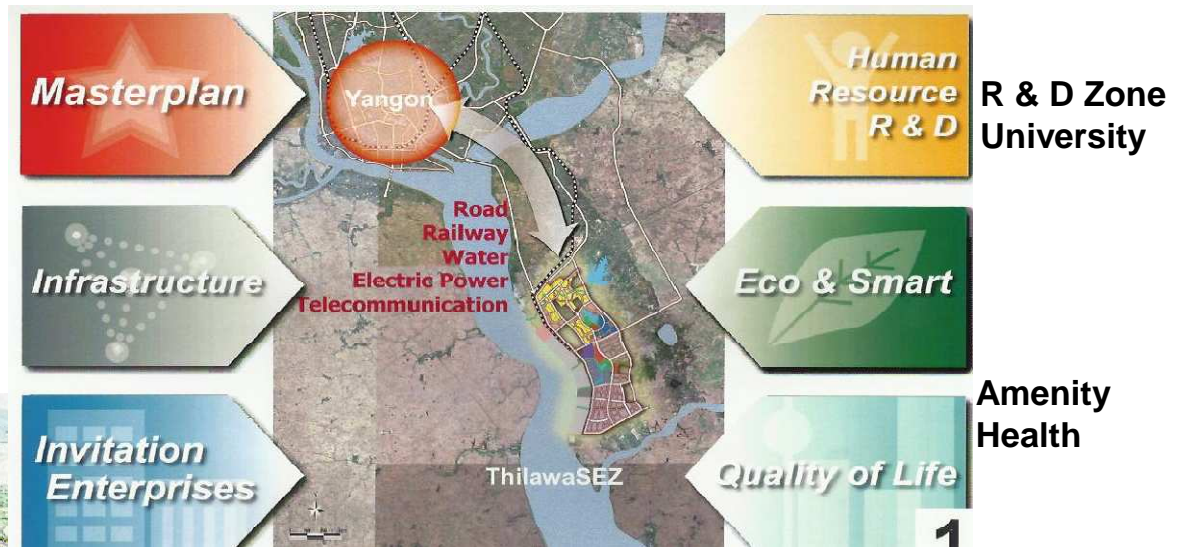
THILAWA SPECIAL ECONOMIC ZONE

MOU between Myanmar and Japan Government



COMPREHENSIVE DEVELOPMENT PLAN (2)

- Industrial Zone
- Hi-tech Park Zone
- Administration, Customs
- Logistic Zone
- Commercial & Business Zone



Invite Competitive Enterprise

YANGON CITY – URBAN DEVELOPMENT PROJECTS



Myanmar-Vietnam Cultural and Commercial Center

Five Star Hotel
Commercial Center
Office Building
Service Apartment
8 ha of Land
300 million USD, 100% FDI

• OPPORTUNITIES OUTLOOK

- HOTEL
- SERVICE APARTMENT
- RESIDENTIAL HOUSING
 - CONDOMINIUM
 - AFFORDABLE HOUSING
- COMMERCIAL COMPLEX
 - BANK
 - SHOPPING COMPLEX
 - AMUSEMENT PARK



Service Apartment



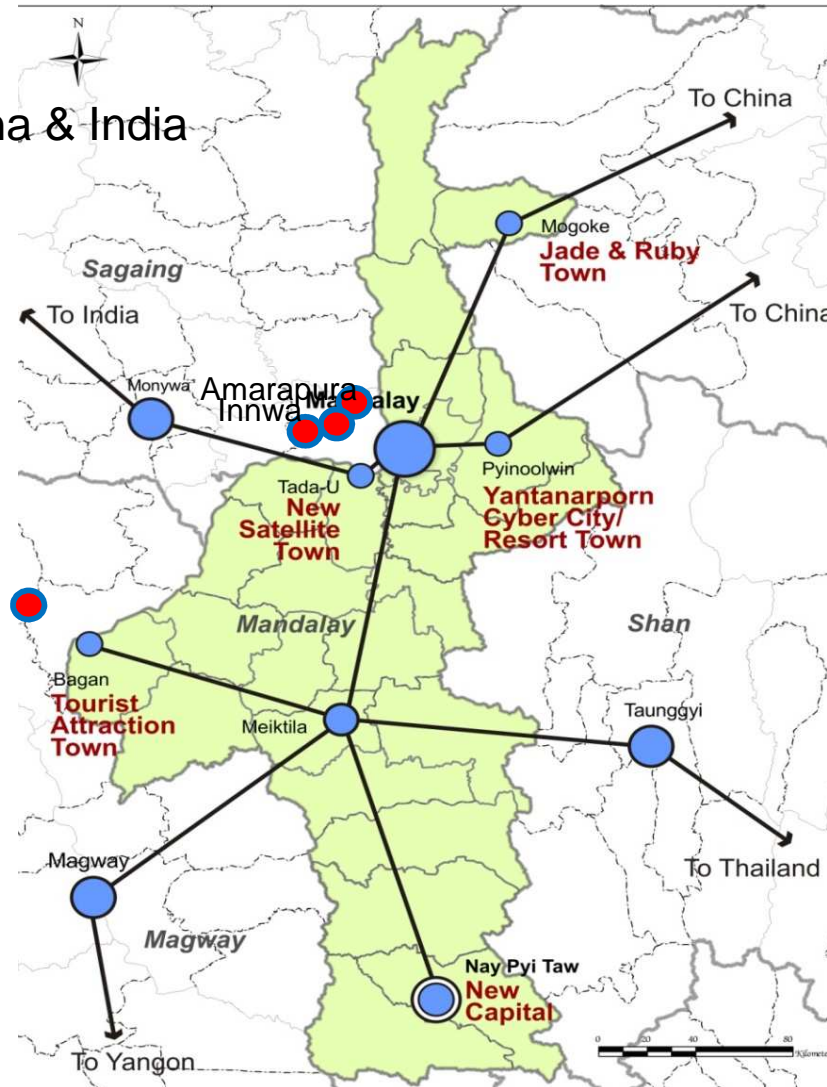
Housing Project

MANDALAY CITY – DEVELOPMENT POLE OF MYANMAR

Role and Characteristic of Mandalay Region

- 4 old capitals & last royal capital
- Second largest city
- Center of culture, Buddhism & tourism
- Regional center of Upper Myanmar
 - Commercial
 - Logistics
 - Transit trade with China & India

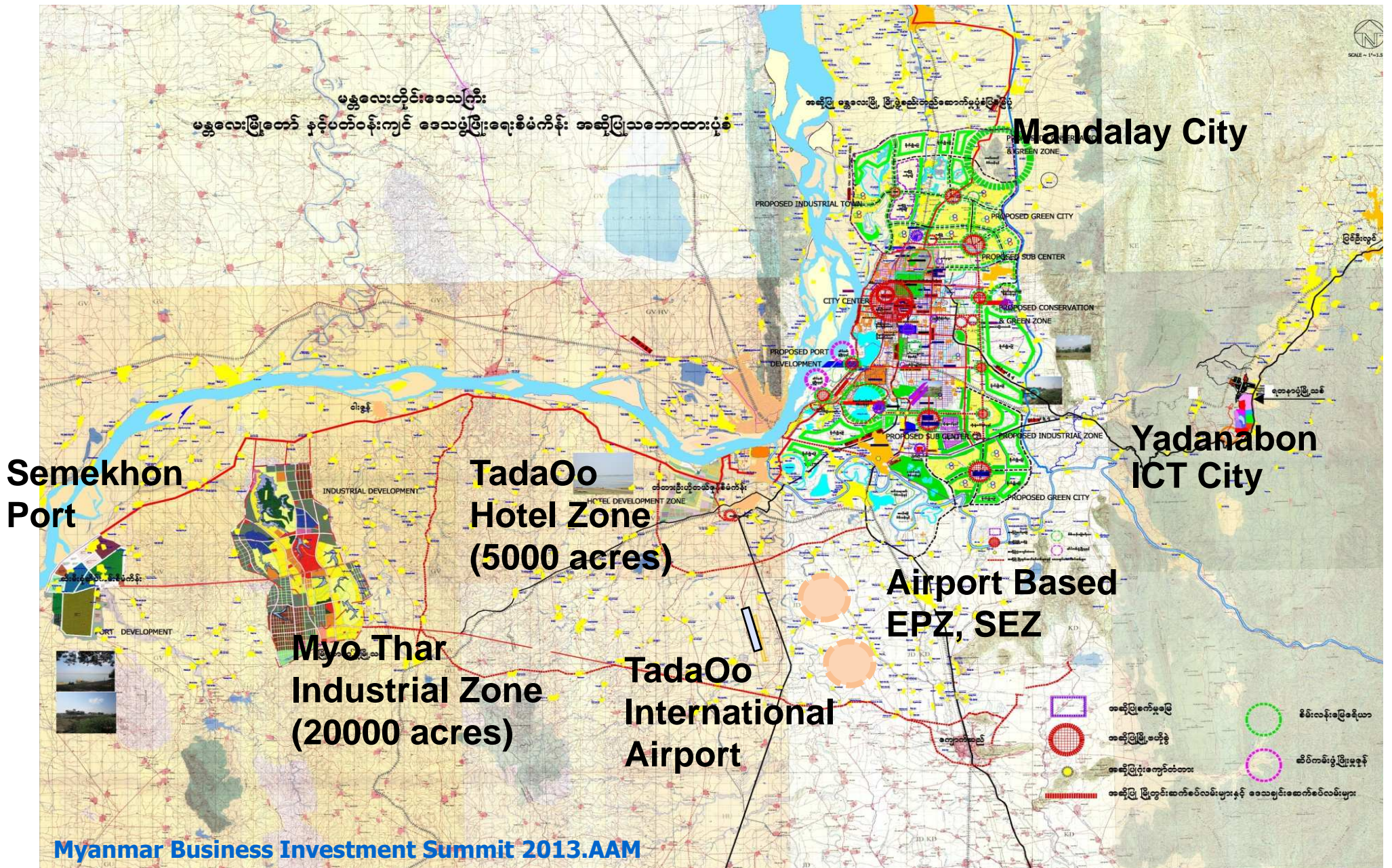
Area (2011) - 45.70 sq-mile (118.36 sq-km)
Area (2013) - 121.5 sq.mile
Population(2010)- 1.034 million
Population (2040)- 1.6 - 2.0 million



- **YANTANARPORN CYBER CITY** (ICT town in Pyinoolwin Township)
- **MOGOKE** (jade and ruby production center, connecting to China)
- **TADA-U** (Hotel Zone & new satellite town project)
- **NAY PYI TAW** (new capital city) (Hotel Zone)
- **BAGAN** (tourist attraction town) (Hotel Zone)



Mandalay City & Regional Development Plan . DHSHD. MOC (2040)



Source: Department of Human Settlements & Housing Development. MOC

Key Challenges in Housing Development

- With expected growth of population from around 60 million to around 90 million by the year 2040, the housing market is expected to grow continuously in the near future.
- Increase in housing demand due to
 - increase in per capita income and saving capacity due to the national development projects and changing political and economic situation;
 - increase of foreign investment in industrial and service sectors as well as agricultural mechanization resulting in more urbanization.

Key Challenges in Housing Development

- With around 12 million households in Myanmar, calculated at household size of 4.7, an annual demand for housing is around 300,000 units, making the housing development an important sector for the future.
- Development of sustainable housing financing system;
- Resource development in modern building materials, construction technologies, machineries, equipment and promotion of construction industry for mass production of housing.

HOUSING POLICY

- **To provide affordable housing for middle and low-income groups throughout the country.**
- **To establish housing finance mechanism to promote affordability and house ownership for the people.**
- **To promote construction industry development and mass production techniques minimizing construction cost and time.**
- **Cooperation with regional governments in implementing large scale public housing and low cost housing projects through urban development approach.**
- **To draft required laws and regulations ensuring provision of safe and adequate shelter.**
 - **Building Codes**
 - **Condominium Act**
 - **Spatial Planning Law**
 - **Housing Development Law**

Means and Areas for Housing Development in Yangon

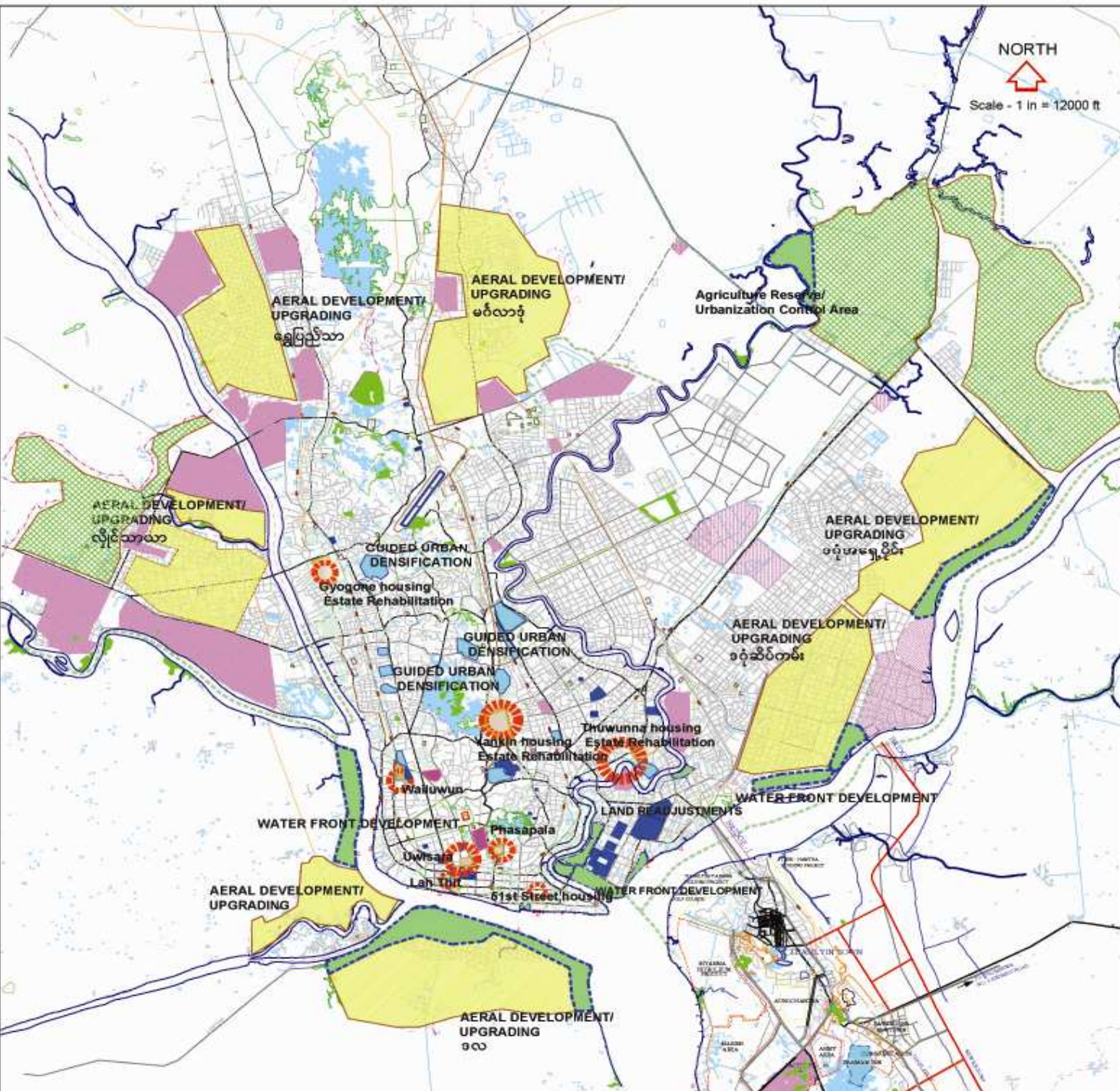
As an increase of around one million households is expected in the next 30 years, there is an annual need of around 25000 housing units and housing plots. This is proposed to be implemented through -





- **Densification of unpopulated residential areas;**
- **Upgrading of Housing Estates:** upgrading of government owned and public housing estates, densification through additional storeys in the upgrading projects (e.g. Yankin Shwe Ohnpin Housing Estate);
- **Old Satellite Towns Redevelopment:** with the location of South Okkalapa, North Okkalapa and Thaketa townships becoming central, efficient utilization of existing buildings and increase of building storeys to achieve densification;
- **New Satellite Town Redevelopment:** Densification through mid-rise housing estate development in unpopulated wards of Dagon Newtown, Shwe Pyithar and Hlaing Thayar townships.
- **Water Front Development:** Urban regeneration and land readjustment in Botahtaung, near Botahtaung Pagoda, Dawbon (Pazundaung Creek), Dagon Seikkan and Thaketa.

NORTH
Scale - 1 in = 12000 ft

Proposal for Yangon City Urban Development (Short and Medium Term Actions)

Proposed Means and Areas for Housing Development



-  **EXISTING HOUSING ESTATE REHABILITATION**
i.e Yankin, Thuwana, Botahtaung, Kandawlay, Wailuwun, Gyogone, Lan Thit, Uwisara, etc.
- GUIDED URBAN DENSIFICATION**
 -  ON BLOCK DENSIFICATION, CITY INFILL
i.e Kandawgalay (Phasapala), Sanchaung (Wailuwun), Tamwe (near Bo Sein Hman St.), Mayangone (between Parami Rd. and Kabaaye Pagoda).
 -  LAND READJUSTMENTS
i.e Sanchaung (Wailuwun), Tamwe (near Min St.), Southokkalar (near Kyeikkasan Pagoda), Thuwana (Yangon Thit), Thaketa.
- WATER FRONT DEVELOPMENT**
 -  URBAN REGENERATION, LANG READJUSTMENT
i.e Botahtaung (near Botahtaung Pagoda), Dawpon (Pazuntaung Creek), Dagon Seikkan, Thaketa.
- AERAL DEVELOPMENT**
i.e Dagon Seikkan, East Dagon, Shwe Pyi Thar, Hlaing Tha Yar.
- AGRICULTURAL RESERVE**
urbanization control area
East Dagon, Hlaingthaya etc.

Dagon Seikkan, Ayeyarwun and Yadanar Affordable Housing Project



1. Area – 220 Acres (89.03 Ha.)
2. Parcels – 11 Nos.
3. Buildings – 49 Nos.
4. Floors – 18 Storeys
5. Units/Bldg – 400 Nos.
6. Total Units – 19600 Nos.
7. Unit Area – 600 sft
8. HH size – 4.5 p /hh
9. Population – 88200 p.

- School
- Sports Ground and Recreation Places
- Market and Commercial
- Bus Terminal with Commercial Shops
- Car Parking
- Clinic, Police Station, Fire Station etc.
- Physical Infra
- Waste water Treatment

Rental Housing Scheme in Regions and States

Government Rental Housing for Government Servants

Capital cities - 2000- 2500 units /years (average)

Government Budget

Housing Estate Redevelopment Scheme

Old Housing Estates (DHSHD)

10 Housing Estates in Yangon (450 acres)

3 Housing Estates in Mandalay

29 Housing Estates in Other Cities

Redevelopment Program through PPP





Affordable and Rental Housing Scheme

20 years Long-term Development Plan in Housing Sector (2011-2031) - one million housing scheme 2013-2016 – 100,000 Housing Scheme

- Location - Regions/State's capital cities & secondary towns
- Target Group - Priority for government servants and low-income people
- Delivery - income level & status accordingly
- Financing - Housing Mortgage Loan for 20 years
- Housing Financing System (Bank, Finance Institution)
- Investment - Government Budget/ Revolving Fund/ PPP & Loans, grant
- Planning – Township Development with neighborhood concept
- Infrastructure - water, sanitation , electricity supply, waste management,
road & drainage
- Operation & Management – DHSHD + ward council + community

URBAN PLANNING & HOUSING DEVELOPMENT SECTOR TECHNICAL COOPERATION AND ASSISTANCE PROGRAM UNDERTAKING

UN-HABITAT

- Myanmar Safer Urban Settlement Development Program , Urban Research & Development Institute (URDI)
- Establishment of Myanmar National Building Code
- Capacity Building through Training and Research
- Disaster Risk Reduction & Capacity Building Program

GERMANY COLGONE UNIVERSITY

- Urban Network System, 81+ Cities Socio-economic Studies and Research
- Capacity Development

ADB

- Urban Policy Development
- Urban Services Improvement Program (Infrastructure Upgrading) of Mandalay City Strategic Development
- Corridor Town Development Program

URBAN PLANNING & HOUSING DEVELOPMENT SECTOR TECHNICAL COOPERATION AND ASSISTANCE PROGRAM UNDERTAKING

ADPC

- Development of Land Use Planning Guideline for Mandalay City on Disaster Risk Reduction &
- GIS Training Program

MLIT & JICA

- **URBAN PLANNING SECTOR**
- Yangon Strategic Urban Development Plan (YCDC)
- Zoning Plan and Township Development of Yangon City (MOC+YCDC),
- National Spatial Development Plan & Development of Spatial Planning Law (under discussion)
- **HOUSING SECTOR DEVELOPMENT**
- Development of Building Code & Standard
- **Capacity Building & Technical Assistance**

URBAN & REGIONAL DEVELOPMENT PLANNING TECHNICAL COOPERATION AND ASSISTANCE PROGRAM (UNDER DISCUSSION)

First Joint Committee on Economic Cooperation of South Korea and Myanmar

- To promote economic development of Myanmar
- To provide opportunities to Korean Companies in economic environment of Myanmar

Korean
International
Cooperation
Agency
(KOICA)

- “ Development of the Master Plan for Southwestern Yangon Region of Myanmar “
- Technical Assistance Program (2015) Assisted and Approved by KOICA
 - Korean-Myanmar Friendship Bridge
 - Development of Industrial Complex

URBAN & REGIONAL DEVELOPMENT PLANNING TECHNICAL COOPERATION AND ASSISTANCE PROGRAM UNDER DISCUSSION

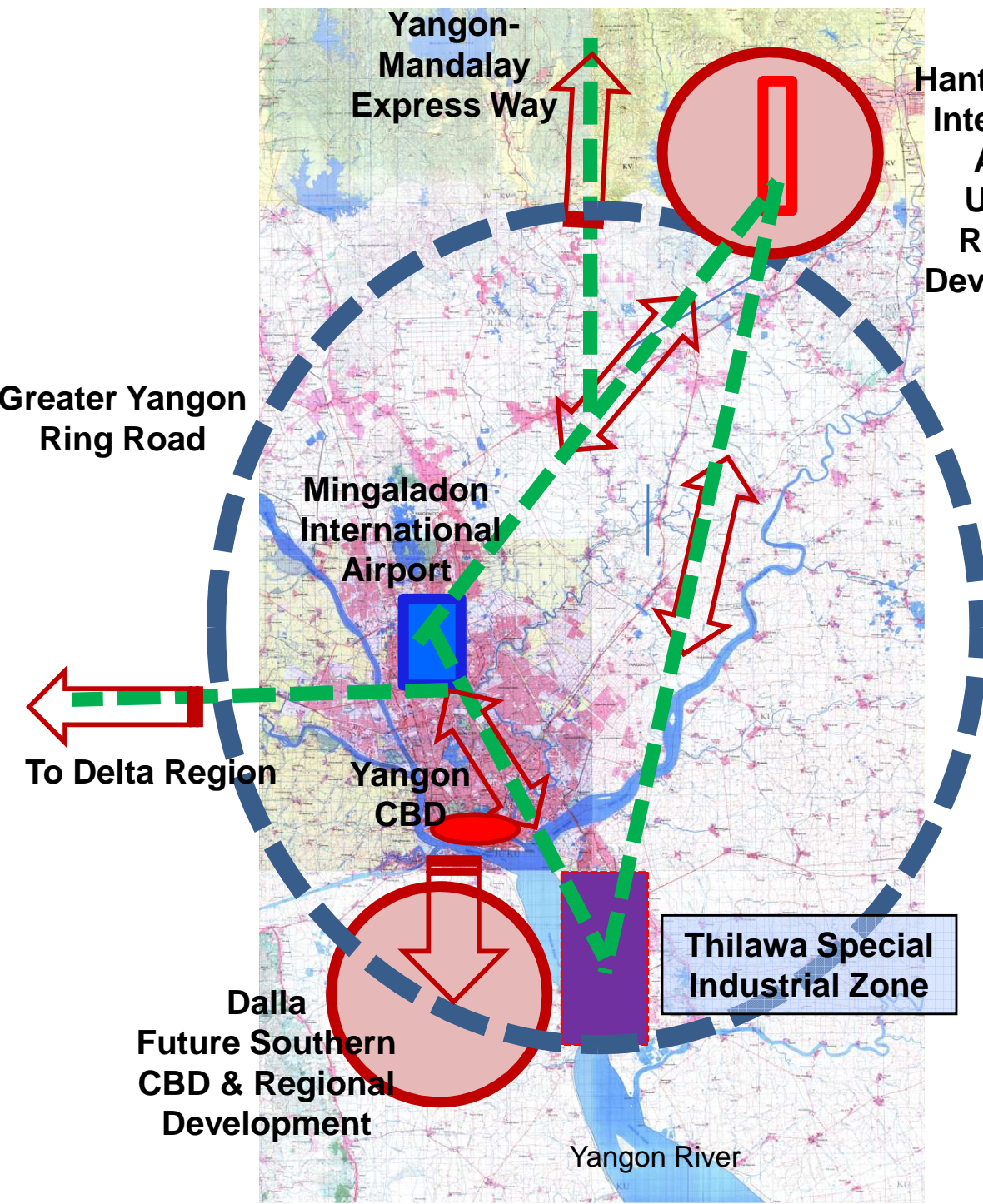
Technical Cooperation of South Korea and Myanmar

- To allocate proper infrastructure investment within the Regional Spatial Development framework
- To develop reserved land for urban development (Residential, industrial, commercial and Recreations)
- To create Airport Based City Development

Korean
International
Cooperation
Agency
(KOICA)

- Formulation of Master Plan for Regional Development in the Yangon- Hanthawaddy – Bago Corridor
- Technical Assistance Program Proposed by DHSHD of Ministry of Construction
 - Master Plan for regional Development
 - Feasibility for High-Tech Industrial Complex Development near by the New Hanthawaddy International Airport

DEVELOPMENT TRENDS IN THE YANGON REGIONAL DEVELOPMENT CONTEXT



New Hantharwaddy International Airport Urban & Regional Development

Yangon City Development Trends North & North Eastern Direction between Yangon and Bago Corridor

Connection of Yangon International Airport – Thilawa Port - Hanthawaddy-Bago – Express way

Development Potential & Linkages between Thilawa SEZ and Hanthawaddy New Airport

Development Potential on New CBD in Yangon Southwestern Region

Needs for Soft and Hard Infrastructure in Urban & Housing Development

- Urban System, Urban Planning, Urban Management and Urban Design as well as Urban Economic Development
- Housing Policy and Strategy
- Rules, Regulations and Development Guidelines
- Institutional Arrangement and Development Mechanism,
- Development of Housing Financing Mechanism,
- Development of Infrastructure, Amenities
- Development of Construction Industry
- Transportation System
- Resourceful capacity building,
- Funding and
- Proper and Available Land.





*For Better Urban Future with
Sustainable Development*

*Further technical Cooperation
with KRISH and KOICA of
Korea*

Thank You