



Japan-OECD Policy Forum on Urban Development and Green Growth



**Department of Human Settlements & Housing Development
Ministry of Construction
October, 2014**

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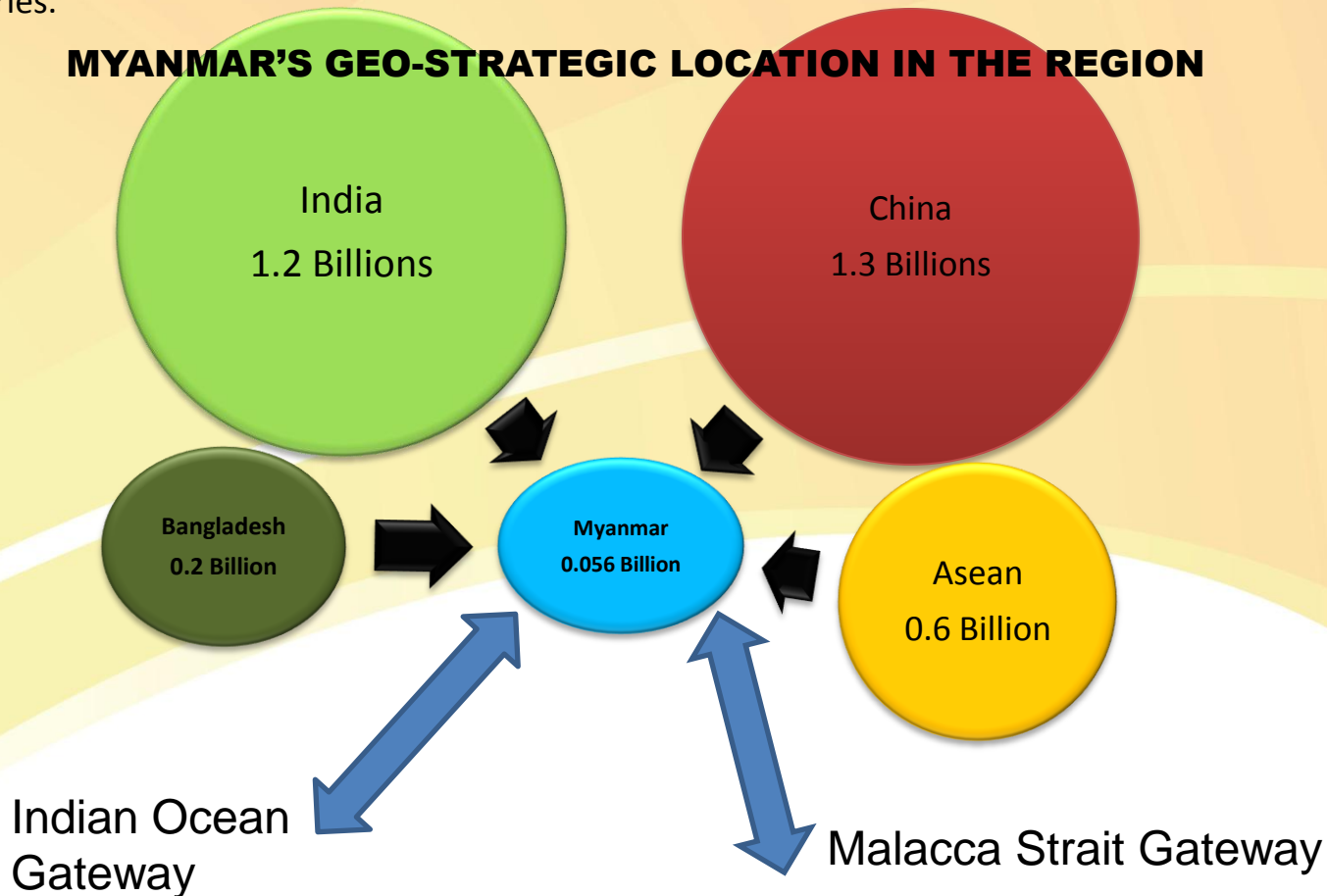
Part-I

Urbanization and Development

WHERE MYANMAR STANDS TODAY

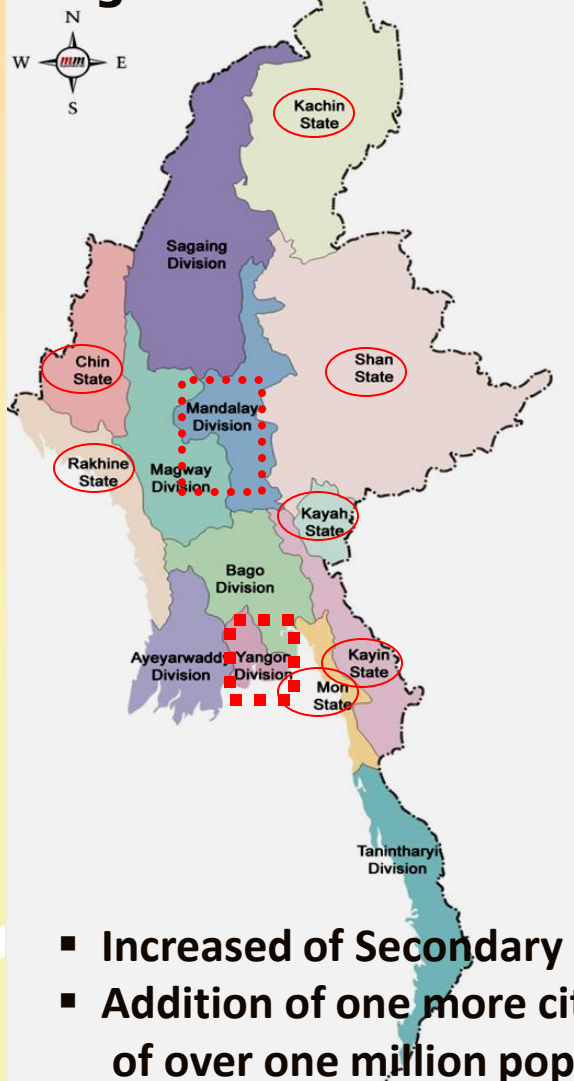
- Myanmar is situated at the cross road between two most populous countries in the region(China and India)
- Myanmar's economy is based on agriculture and 70% of the population lives in rural areas where their livelihoods depend on agriculture sector.
- Myanmar was once World's no: 1 rice exporter and today no: 2 exporter of pulses and beans after Canada.
- Due to its Geo- strategic location , many Economic Corridors have been identified linking with neighboring countries.

MYANMAR'S GEO-STRATEGIC LOCATION IN THE REGION



MYANMAR URBANIZATION TREND AND DEVELOPMENT

7 Regions and 7 States



- Increased of Secondary Urban Centers
- Addition of one more city in the range of over one million population

365 Urban Centers and Urban Population

No.	States/Regions	Area (km ²)	No. of Urban Centres	Urban Population (2010)
1	Kachin State	89,042	26	417654
2	Kayah State	11,733	8	109056
3	Kayin State	30,383	13	250542
4	Mon State	12,297	13	1,025,113
5	Chin State	36,019	12	112758
6	Shan State	155,801	75	1,395,075
7	Rakhine State	36,778	20	619,003
8	Yangon Region	10,171	17	6,210,336
9	Mandalay Region	37,024	31	2,336,794
10	Sagaing Region	94,623	40	1,157,671
11	Bago Region	39,404	33	1,410,254
12	Ayeyarwaddy Region	35,138	34	1,452,470
13	Magwe Region	44,819	27	999,019
14	Tanintharyi Region	43,346	16	481,971
	Total	676,578	365	1,797,7896

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

Corridor and Highway Infrastructure Development

Corridors Developments and SEZ

Asian Highway Route



- **East-West Economic Corridor** (Myanmar - Thailand – Laos- Vietnam) (Mawlamyine, Hpa-an, Kyaukarate, Myawaddy – Meisok))
- **Southern Economic Corridor** (Myanmar- Thai) (Dawei – Kanchnaburu-Bangkok))
- **Yunan-Myanmar Corridor** (Kyauk Phyu- Mandalay-Kunming) (Kyauk Phyu, Sittwe, Mandalay, Lashio, Muse)
- **India –Kaladan-Sittwe Corridor**,
- **Morae-Tama-Bagan-Myawaddy-Meisok**

Border Trade

- Muse
- Tachilate
- Myawaddy
- Tamu

Myanmar Government has demonstrated its commitment towards democracy, development and a better future for Myanmar.

- ❖ Setting up Policy of “People Centered Development”
- ❖ Reform Strategy of “Bottom-Up Approach”
- ❖ Establishment of National Planning Commission
- ❖ Decentralization and delegation of power to regions and states
- ❖ Comprehensive and Concentrated Decentralization Strategies in Planning and Development
- **The Reform Process**
- **Phase 1. - Political Reform**
- **Phase 2.- Economic Reform**
- **Phase 3. - Administrative Reform**
- **Phase 4. - Restructuring of Public Sector and Private Sector Development**

Part-II

National Spatial Development Concept

NATION SPATIAL DEVELOPMENT CONCEPT

CONCEPT OF CONCENTRATED AND DECENTRALIZATION DEVELOPMENT STRATEGY

Two-Polar Development Concept (Yangon & Mandalay)

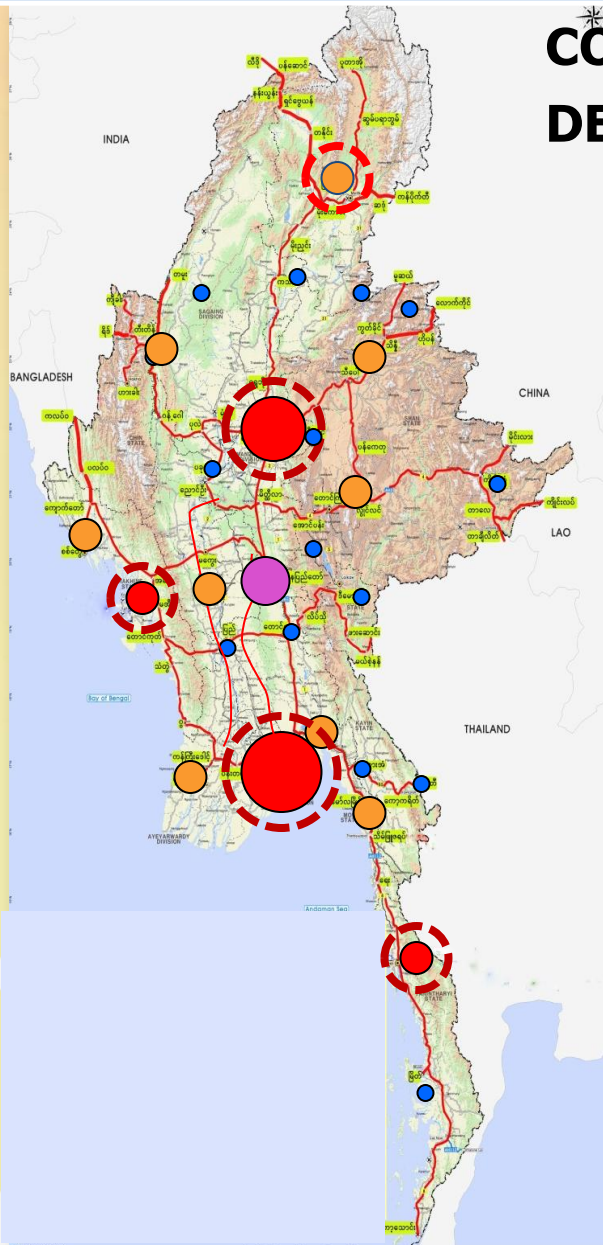
- Capital City (Administrative, Transport & Logistic Hub)
- National Economic Growth Centre (SEZ, Port, Int. Airport, Trading, Financial)
- Secondary Regional Growth center
- Other Growth center

Town with more than 50000 inhabitants

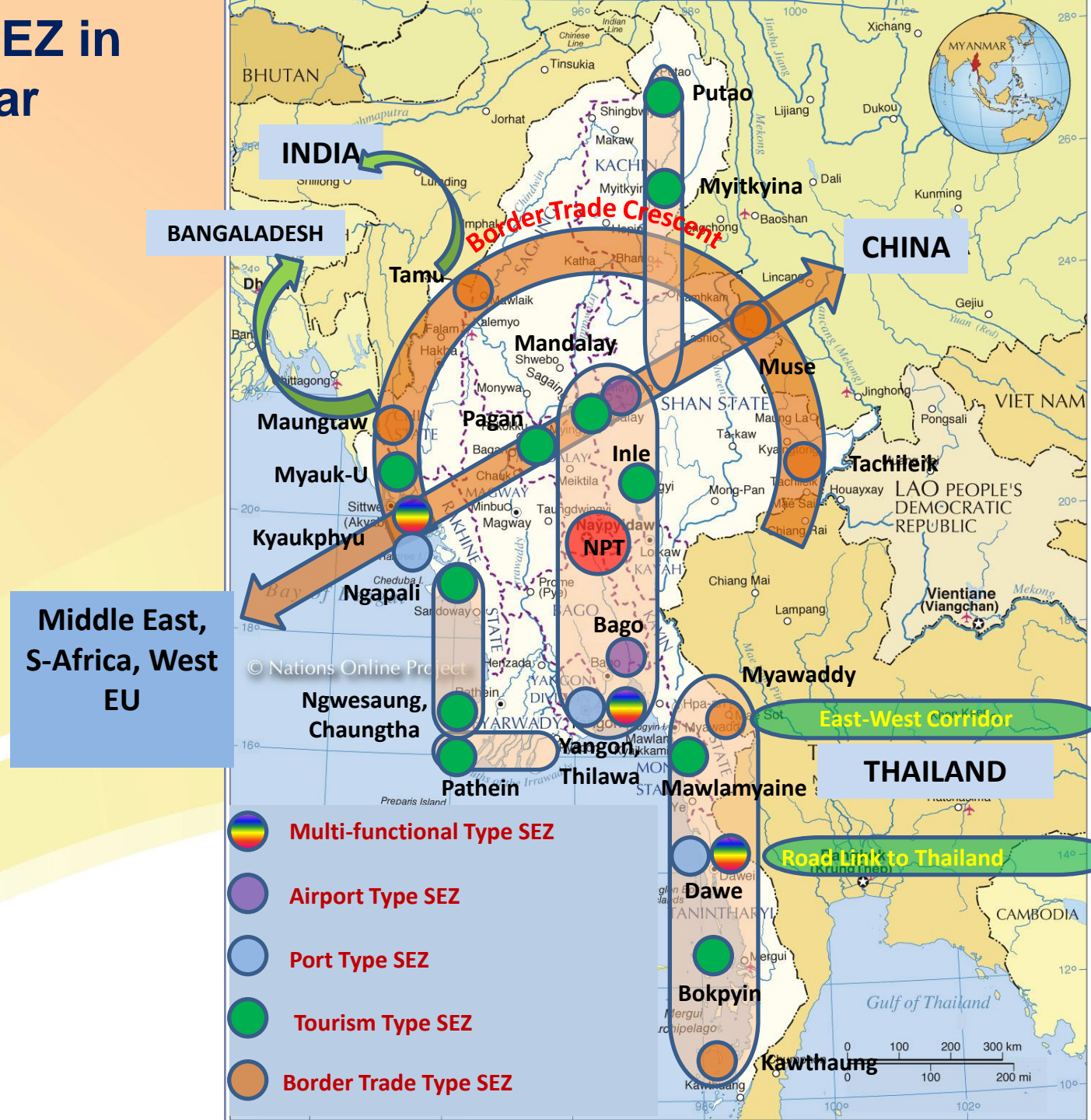
Main Corridor

Emerging Regional Corridor

Major Communication Axis



Potential of SEZ in Myanmar



Part-III

Urban Planning Issues, Goals and Strategies

Situation and Key Challenges for Urban Development in Myanmar

- **Rapid economic growth resulting from change in political and economic policies of the nation, has put a lot of pressure on urbanization as well as the urban development process.**
- **Need to achieve sustainable and balanced development for the nation as a whole.**
- **Understanding different potential of Regions and States to attract the expected flow of investments both local and foreign as well as infrastructure project finance due to decentralization.**

Urbanization

The majority of Myanmar's citizens still live in the rural areas .. that is likely to change—at a rapid speed and on a large scale.

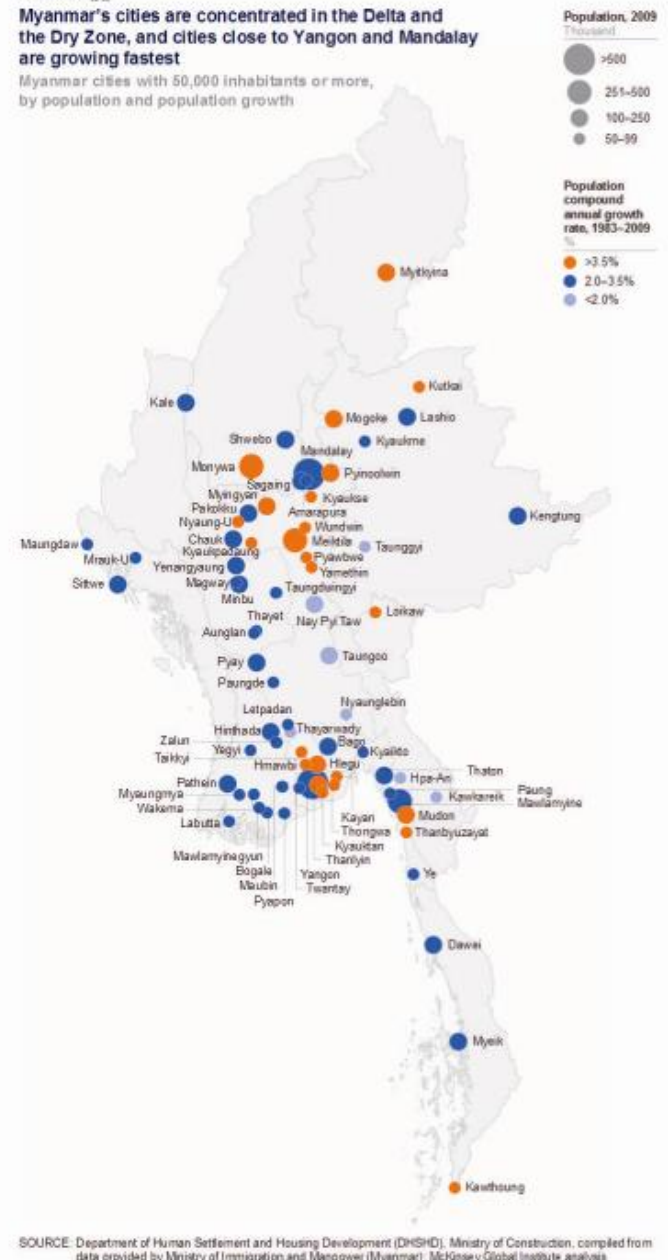
- First, it **needs to plan proactively for its urban expansion**, putting in place a modern planning system.
- Second, Myanmar **needs to invest in the infrastructure** that cities require to run smoothly and to cater to the needs of their citizens.
- Third, it **needs to consider the governance of cities**.

Mc Kinsey Global Institute: Myanmar's moment: Unique Opportunities, major challenges, June 2013. p. 8

Exhibit 33

Myanmar's cities are concentrated in the Delta and the Dry Zone, and cities close to Yangon and Mandalay are growing fastest

Myanmar cities with 50,000 inhabitants or more, by population and population growth



Infrastructure

- Myanmar's infrastructure is not sufficient ... to support the higher growth and future demand driven by developing industrial sectors and an urbanizing population.
- Between 2010 and 2030, ... Myanmar will need to invest \$320 billion in its infrastructure if the economy is to achieve growth of 8 percent a year.
- The majority of infrastructure investment—60 percent—will need to be in residential and commercial real estate, but there is also a huge need for power plants, water-treatment plants and road and rail networks.
- Mc Kinsey Global Institute: Myanmar's moment: Unique Opportunities, major challenges, June 2013. p. 12

Exhibit 29

Myanmar's population living in large cities with 200,000 plus inhabitants, could double from just 13 percent to one-quarter of the population in 2030

Share of country population living in cities of more than 200,000 inhabitants

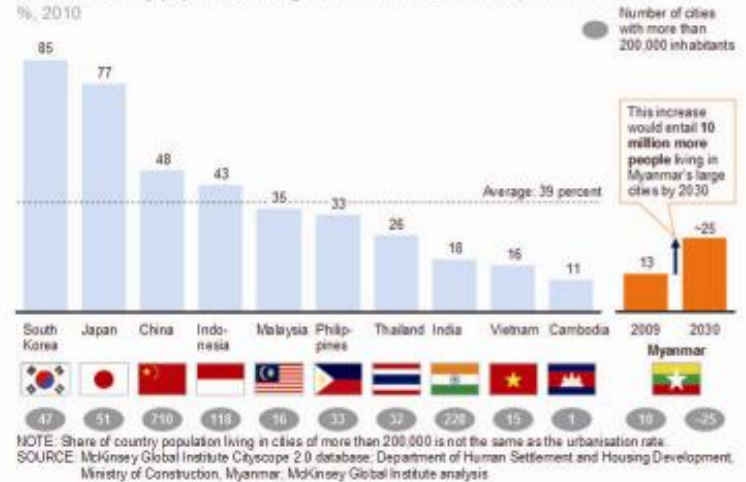
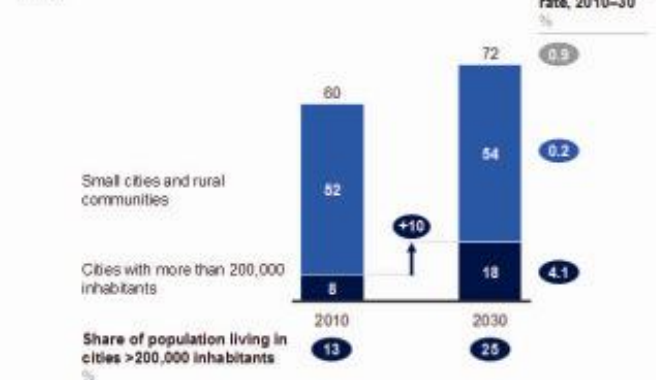


Exhibit 30

Between 2010 and 2030, ten million more people could live in Myanmar's large cities—equivalent to two cities the size of Yangon

Population of Myanmar

Million



Key Strategic Issues

- **Increase of urban population and demand for job opportunities;**
- **Insufficiency of adequate Laws and Regulations;**
- **Need to establish and implement systematic spatial development and land use planning;**
- **Sustainable allocation of investments both local and foreign, infrastructure projects as well as limited financial resources throughout the regions and states;**
- **Provision of sufficient mitigation measures for the natural disasters (such as flooding, earthquake, fire hazard).**

Goals

- **Establishment of systematic National Spatial Development Planning System;**
- **Establishment of integrated, sustainable and resilient urban network system that will lead to balanced development and sustainable allocation of investment and financial resources;**
- **Upgrading of the organizational and legal setup of the urban development institutions.**

Goal 1

- **Establishment of systematic National Spatial Development Planning System;**

Strategy 1: Drafting of Myanmar National Spatial Development Plan that will support and materialize National Comprehensive Development Plan (NCDP);

Strategy 2: Integration of urban land use in drafting National Comprehensive Land Use Plan to systematically allocate reserved land for future urban development;

Goal 2

- **Establishment of integrated, sustainable and resilient urban network system that will lead to balanced development and sustainable allocation of investment and financial resources;**

Strategy 1: Developing Integrated Urban Network System through survey and analysis of the socio-economic potentials of the individual urban centers;

Strategy 2: Building resilience of the urban centers and the urban network system;

Goal 3

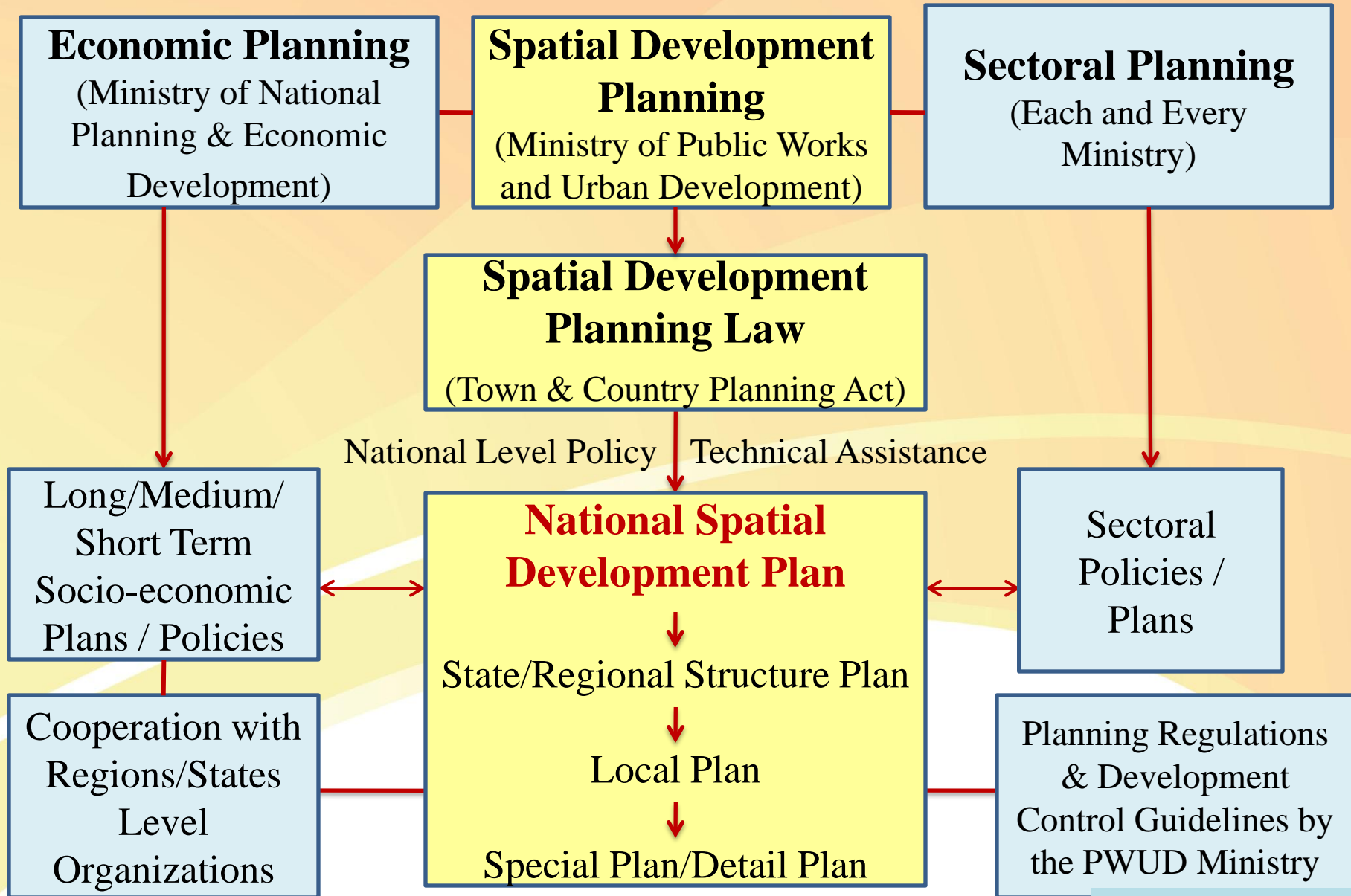
- **Upgrading of the organizational and legal setup of the urban development institutions.**

Strategy 1: Setting up spatial development planning policies and guidelines for National, as well as Region and State levels;

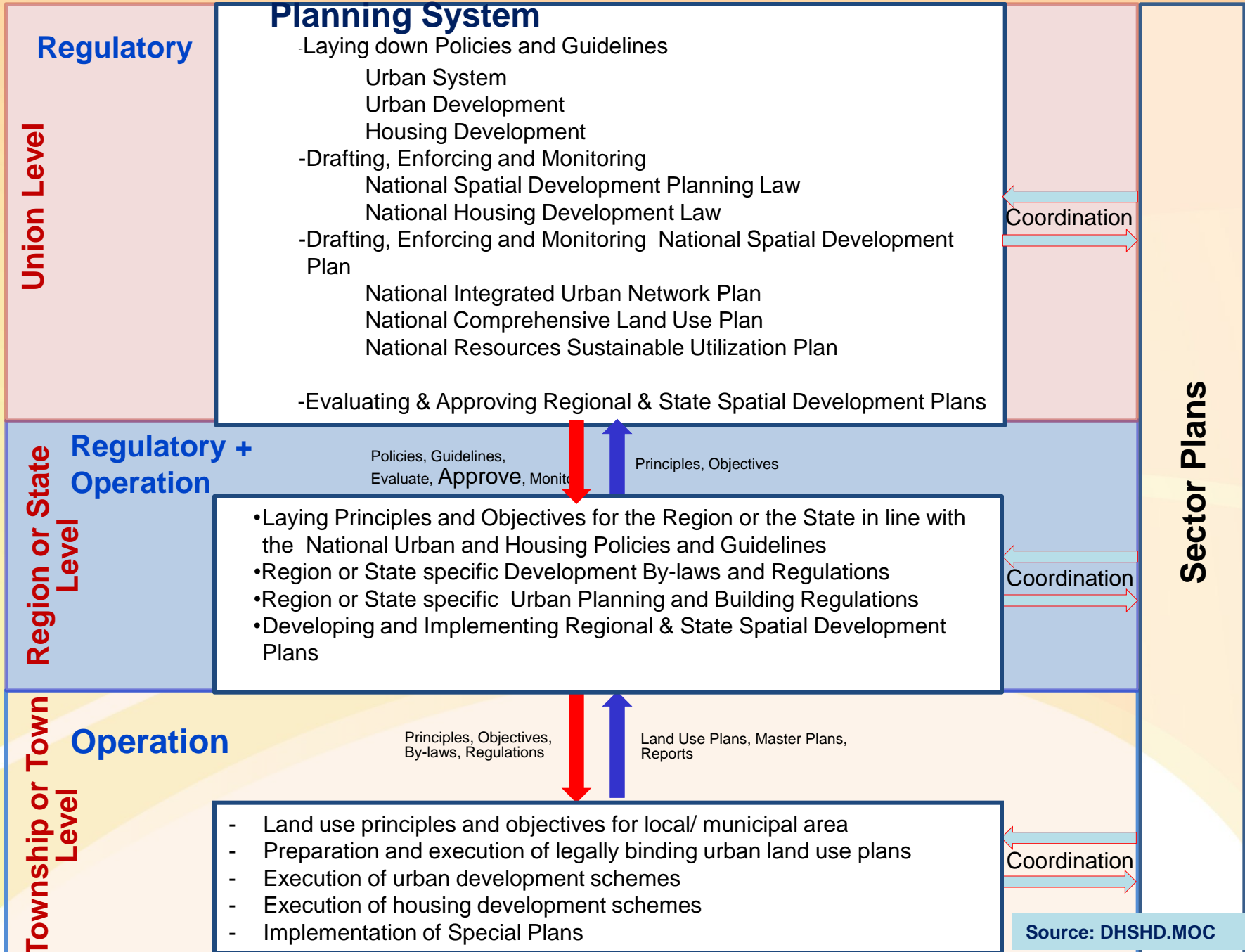
Strategy 2: Modification of existing laws and drafting and enforcing new spatial development planning laws, rules and regulations;

Strategy 3: Strengthening and continuous upgrading of the urban development institutions.

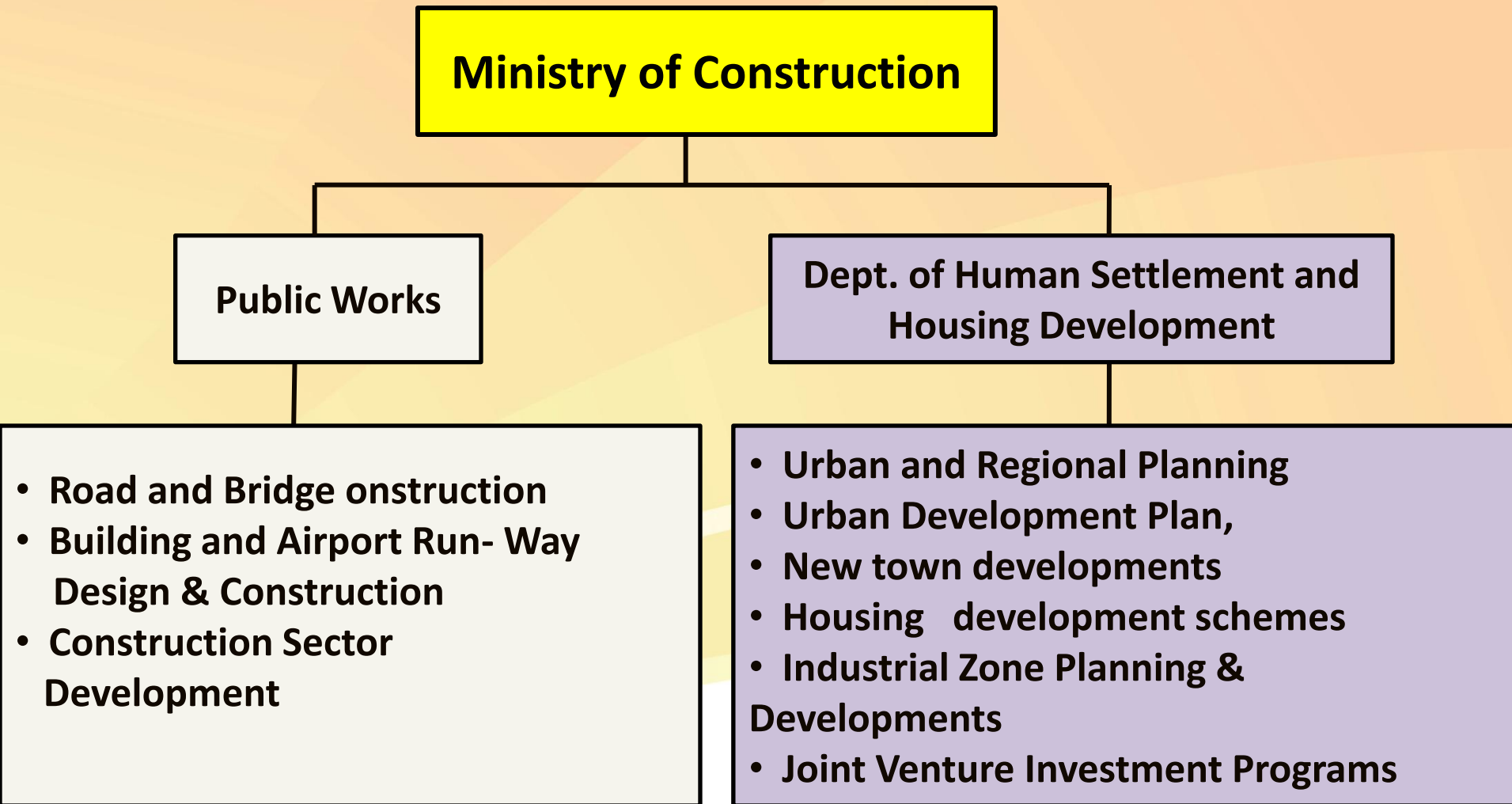
Establishment of National Comprehensive Development Plan



Proposed National Spatial Development



Current Situation of Urban Planning & Housing Development Activities



The Ministry of Construction with an envisaged role of undertaking Urban Planning, • Housing Development and construction of Road & Bridge Infrastructure throughout the nation

Urban Planning Unit- Myanmar

Urban and Regional
Planning Division

Established in 1951 (Town Planning
Section)
(National Housing ,Town & Country Planning
Act)

Total Number of Staffs – 110 persons
1953 = Urban & Regional Planning Division

**Physical Planner – Architect / Engineer/ Planner – 27
persons**

(Urban & Regional Planning, Town Planning, Urban design,
Infrastructure Housing Estate Planning & Design)

Private Sector– Architect / Planner – 10 persons

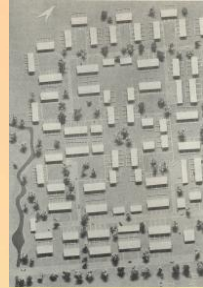
Total Physical Planner – 37 persons

Ratio of Town Planner & Population - 1: 2.22 million

Housing Development Process & Changes



Shelter/Space
Local needs



Post-Independent

1951 NHB Act,
Public Housing
Social needs



From Provider
to Facilitator



Colonization
& Urbanization

RDT (1920)

Pre-Independent



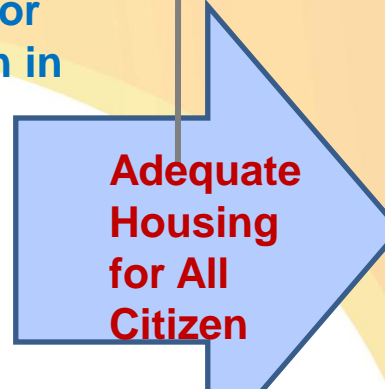
Market
Orientation &
PPP in Housing



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



Adequate
Housing
for All
Citizen

Existing Practice of Land Utilization for Urban Planning

Road and Open Space - 30%

Institutional Area
(offices, school, hospital, etc) - 20%

Commercial Area - 5%

Park and Playground - 5%

Residential Area - 40%

Total -100%

Requirement for Social Infrastructure Based on Household Units

House hold	Market	P-School	M-School	Clinic	Park/ Playground	H-School	Nursery School	16 bedded Hospital	Community Center
500									
2000									
4000									



Planning Phases

Perspective Plan (2011-2040)

To guide the cities in long-term development.



Structure Plan (30 Years)

To provide a long-term strategy to the year 2040 for the development of the cities and its environs. This plan to be composed of report and a map at 1:10,000 scale.



Urban Area Plan (10 Years)

To serve as a guide to development together with the control of land use of the urban areas in Cities. This plan is recommended for a period of 10 years



Detailed Area Plan (3-5 Years)

A series of detailed spatial development plans of different types, formulated for execution in a period of 3-5 years.

Planning Phases and DRR Integration

Structure Plan (Regional Scale)

Activities

1. Boundary Demarcation
2. Exposure Inventory and database Development
3. Demographic Aspect Information and Study
4. Social Sector Information and Study
5. Economic Sector Study
6. **Natural Hazard Study**
7. **Environment and Climate Change Study**
8. Study on Hydrology
9. Study on Transportation
10. Study on Housing
11. Land Ownership and Land Value Study
12. Legal Issue Study
13. Local Resources and Tourism Study
14. Institutional Arrangement Study

Hazard Assessment Results and Hazard Maps

Urban Area Plan

Activities

1. Population Projection and forecast.
2. Spatial Growth Trend Analysis.
3. Transport Mobility Analysis.
4. Housing pattern and Trend Analysis.
5. Land Use Classification.
6. **Vulnerability Assessment in relation to prevailing Hazards.**
7. **Natural Risk Assessment considering prevailing Hazards.**
8. Land Use Zonation
9. Setting of Standards

Exposure, Vulnerability & Risk Assessment Results and Maps

Detailed Area Plan

Activities

1. **Building Vulnerability and Risk Assessment.**
2. **Building Construction Permission and Follow Up.**
3. **Building safety monitoring.**
4. **Construction Monitoring**
5. **Building Code Implementation**

Mitigation Measures and Risk Reduction Initiatives/ Risk Treatment/ Reduction

Urban Area Plan Implementation Mechanism

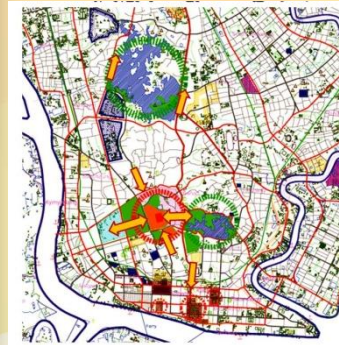
Zone	Permitted Use	Conditional Use	Restricted Use
Residential	Residence	Small business shops like confessionary	Commercial Activities; Any type of Industry; Polluting Activities
Commercial	General Merchandise store ; Food Market; Books and Office Supplies etc.	Light industries with limited manpower/ types	Residence; academic like school/ college
Industrial	Heavy, medium and light industries	Commercial activities with limited categories	Residence; academic like school/ college
Educational	School; college; university	Student Dormitory	No urban use like commercial, industrial, residential
Agriculture	Agriculture, forestry; gardening	Fisheries; livestock	No urban use like commercial, industrial, residential
Open Space	Park; play ground; lake; zoo;	Temporary structure (to be specified) with light activities	No urban use like commercial, industrial, residential
Mixed Use	Combination of Residential, Commercial, offices etc.	Special type of activities (specify)	Any type of Industrial Use
No Development Zone (Hazard Prone Area)	Temporary use like Agriculture, gardening, forestry	Temporary structure (to be specified) with light activities	Power plant; heavy structure; industry;
Urban Reserve (Risk Prone Area)	Existing infrastructures without further extension	Improvement of existing infrastructures	Any type of new construction

Part-IV

Yangon, Mandalay and other Major City Planning

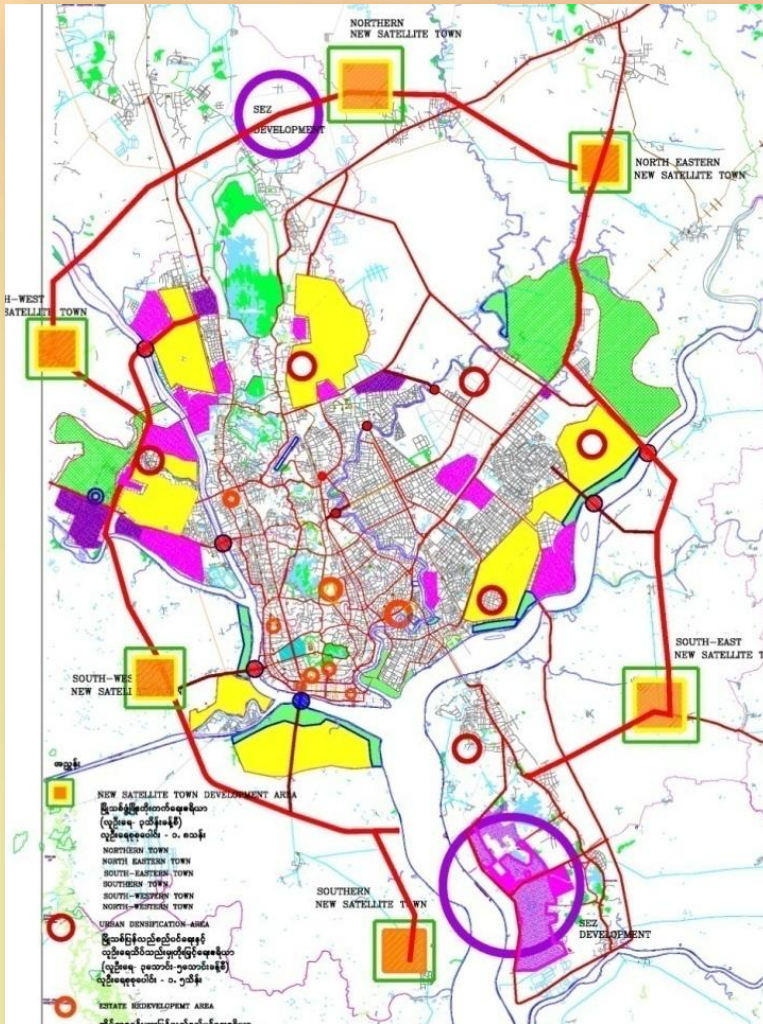
Yangon City Concept Plan (2040)

- Urban Centers & Sub Centers
- Conservation Zones, Green Zone
- Housing Development Area
- Industrial and SEZ Development Area
- Ring Road



Housing Development Plan (2040)

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

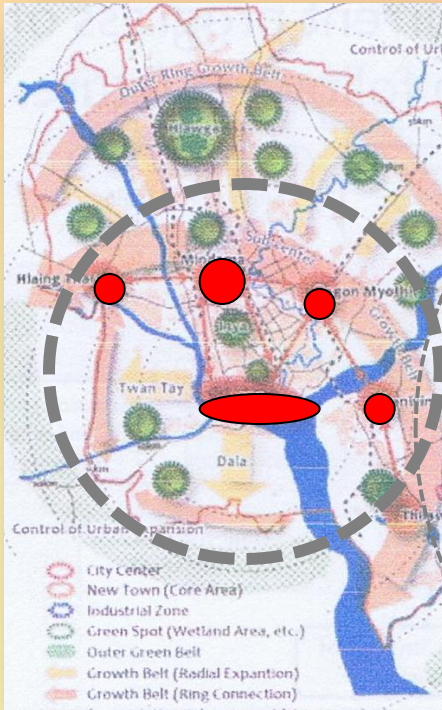


Yangon – Vision 2040 (DHsHD)

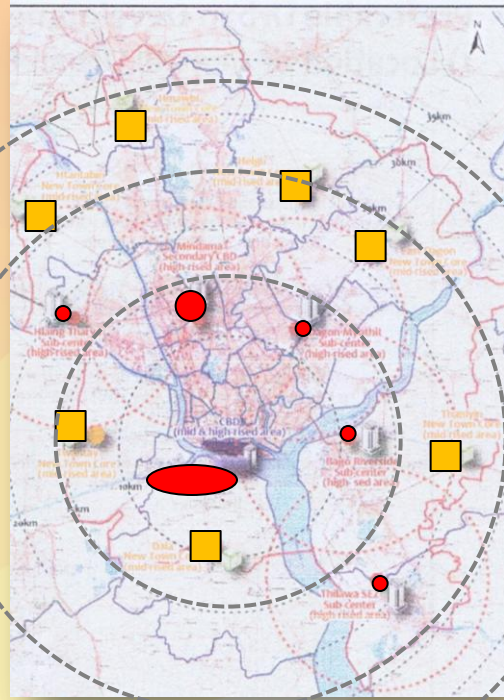
- The Economic Hub of the Nation;
- City of Inland and International Port Integration;
- Green and Healthy City;
- Multi-Ethnic City of Heritage, Culture and Tourism;
- City of Education and Knowledge.

PROPOSED YANGON STRUCTURE PLAN

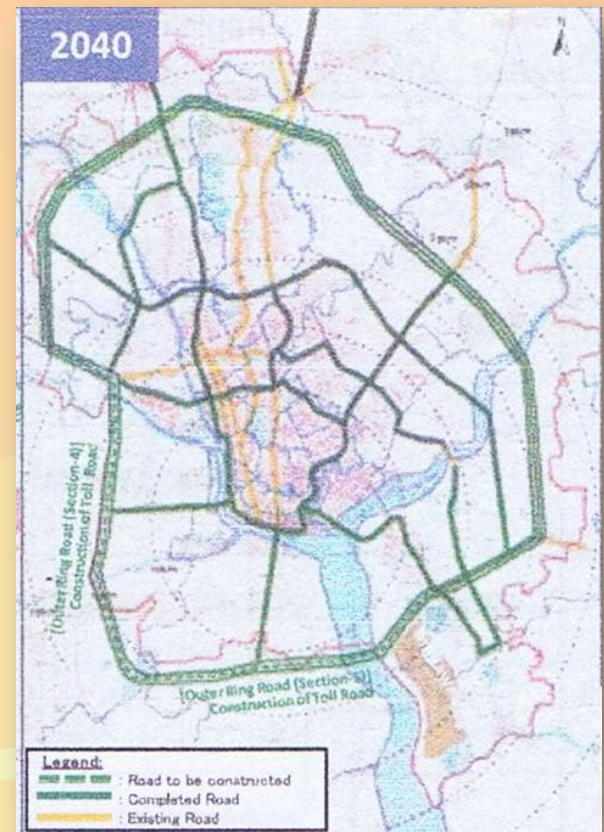
By JICA STUDY TEAM and YCDC



Secondary CBD
Sub-Centers
New Towns Core Areas



New Towns Development

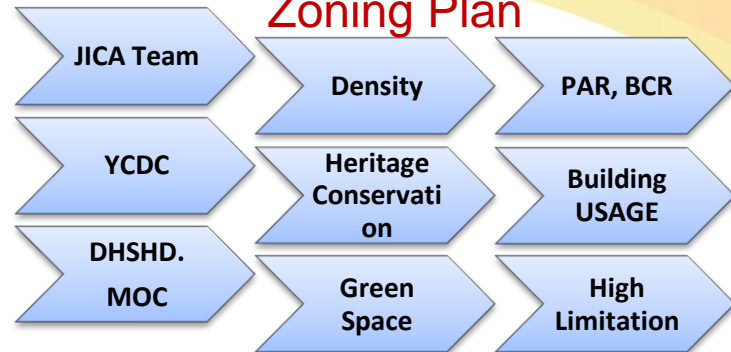


Ring Roads & Transportation Network
Infrastructure Development Plan

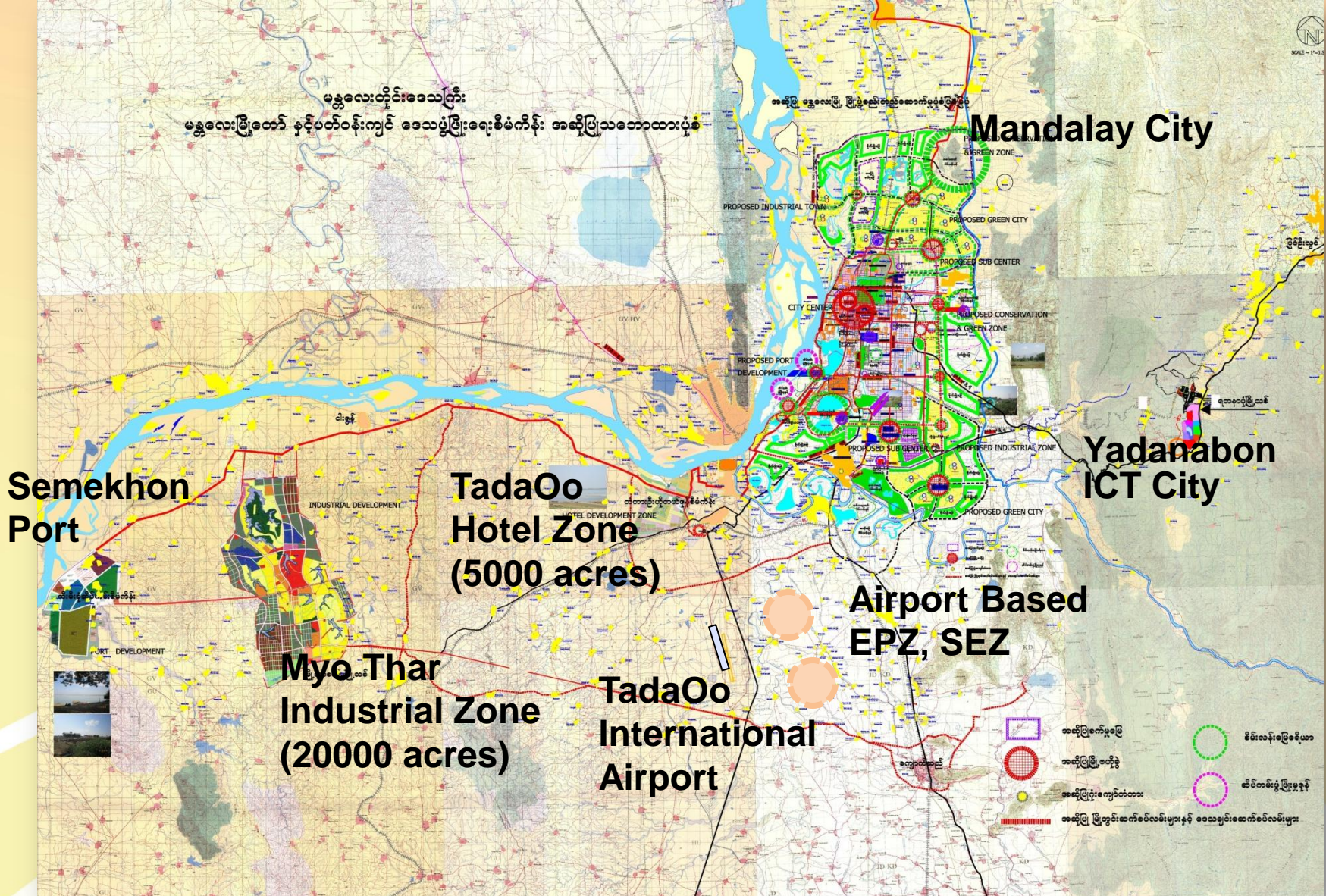
Development Vision

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

Zoning Plan



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



Source: Department of Human Settlements & Housing Development. MOC

Housing Sector Development

- ❖ According to the Yangon Vision 2040, with present population growth rate, **Yangon city will become mega city with 10 million populations in 2040.** Long term, medium term and long terms plans are laid down after the follow up discussions among urban professionals.
- ❖ With **more than 50 % of city population belongs to lower income** bracket, effective and efficient housing policy is an urgent necessity. The government has the **responsibility of looking after the long term interests of the community as a whole**, so that future generations will inherit a city which is convenient and pleasant to live in.
- ❖ **Affordable Housing Program** with public private partnership programs will motivate the construction sector as well as generate the cities' economy through improving socio-economic conditions of the people.
- ❖ **Housing financing mechanism** is fundamental to introduce the long term sustainability of various housing sector development.
- ❖ In this context DHSHD under the Ministry of Construction will play the leading role in the **establishment of housing policy, development strategy and implementation of affordable housing scheme in Myanmar.**

- (1) Establishing & Modifying Necessary Laws, Rules and Regulations**
- (2) Development of the National Housing Policy**
- (3) Development and Upgrading of the National Urban System**
- (4) Capacity Building in Human Settlement Sector;**
- (5) Development of Pilot Housing Schemes**
- (6) Support to Regional Governments in Urban Planning and Human Settlement Sector and**
- (7) Preparation of Concept plan, master plan and Detail Guided plan for Yangon, Nay Pyi Taw and other major cities**

URBAN & HOUSING DEVELOPMENT POLICY

- ❖ Formulation of Spatial ,**Urban, Housing Development Policies and Strategies;**
- ❖ Systematic development of urban system through Spatial Planning for creation of **safer housing and livelihood** for the people;
- ❖ Promotion of **capacity building and human resources development** in human settlement sector
- ❖ Planning and implementation of **appropriate housing and urban infrastructure development** schemes by promoting Construction Industry Development in line with the National Development Policy.

DHSHD ' Development Activities & PPP

- ❖ Planning and Implementation of Urban Development Projects
- ❖ New Town Developments
- ❖ Various Types of Housing Development Schemes
- ❖ Management and Development of the Government Land
- ❖ Industrial Zone Development
- ❖ Joint Venture Investment Programs

Public – Private Partnership is widely practiced in the activities of housing development, infrastructure projects and industrial zone development since 1990 up to now.

PPP Practice in Urban Area Development Projects

(approx. 20,000 dwelling units have been built from 1989-2009)

- Land readjustment through area development schemes

CURRENT SITUATION

Types of Foreign Direct Investment and Land Lease System currently practiced by DHSHD

- a) **Development of International Industrial Zone**
(Joint Venture System between DHSHD and a Foreign Company)
- b) **Hotel & Service Apartment Sector**
(Foreign Company invests 100% FDI through BOT system by renting the land from DHSHD)
- c) **Industrial Manufacturing Sector**
(Foreign investors operate their business with 100% FDI by renting the industrial land plot owned by DHSHD)
- d) **Leasing land and buildings** to Embassies and UN organizations.

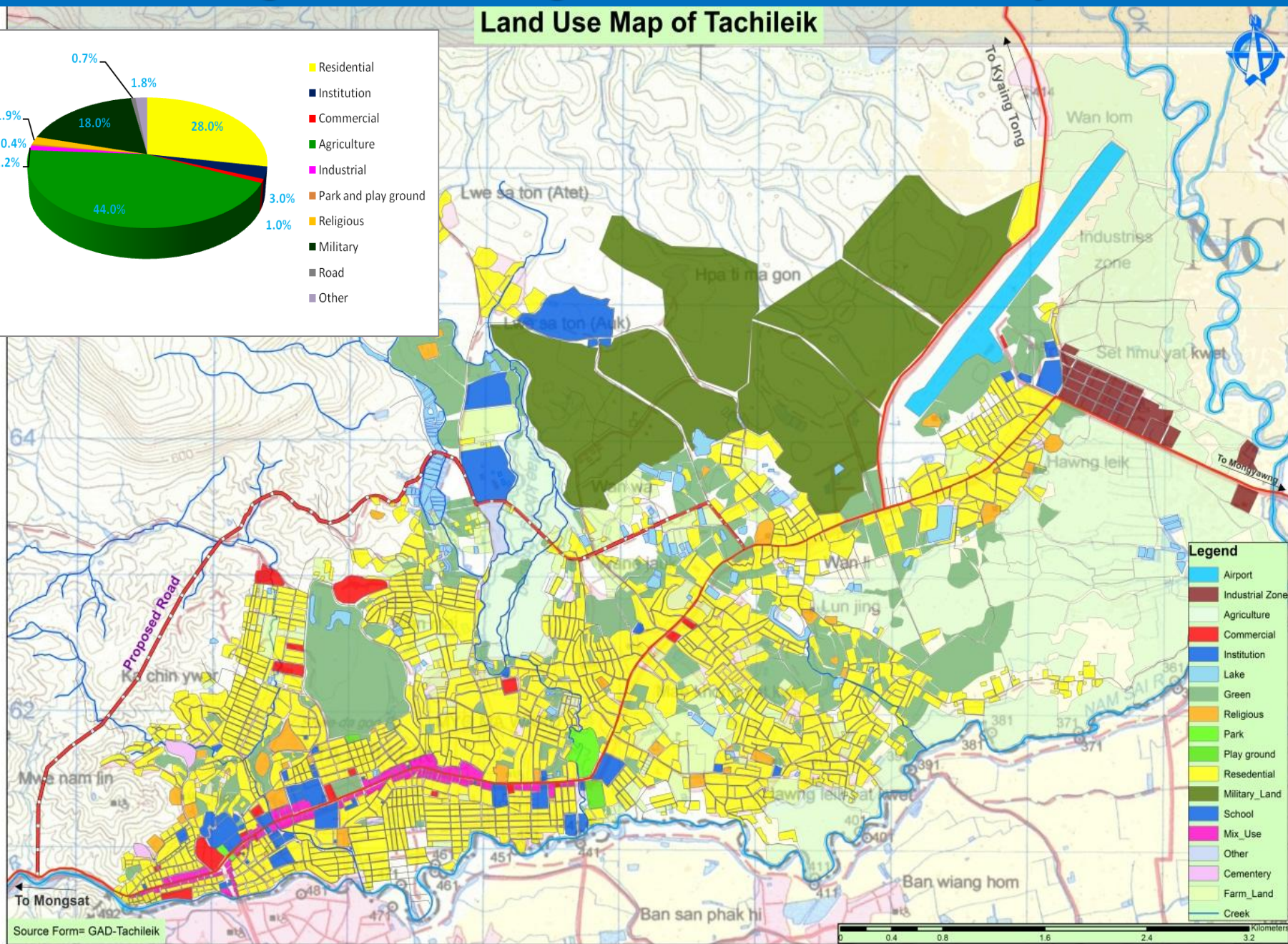
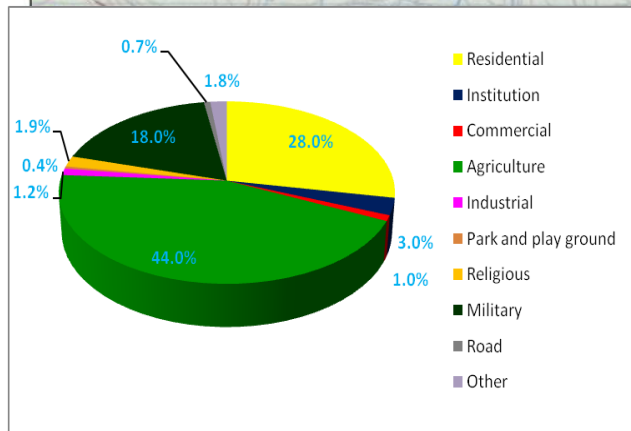
There are slight differences among the systems in rental fee, rental period, rules and regulations

FDI and PROPERTY DEVELOPMENT

- ❖ **Real Estate and Property Development Sector**
housing & commercial building, hotel and service apartment and industrial property related sectors are the sector **where foreign investors are mostly interested.**
- ❖ At this moment foreign investment in the property development has some restrictions such as the transfer of immovable Properties as, **FDI is permitted only on BOT and Joint venture basis.**
- ❖ However, **new Condominium Law** which is **under processing** will be in favor of Foreigners buying and transition of apartments under certain conditions.
- ❖ **FDI OPPORTUNITIES** in development of economic and social infrastructure are growing gradually and significantly.

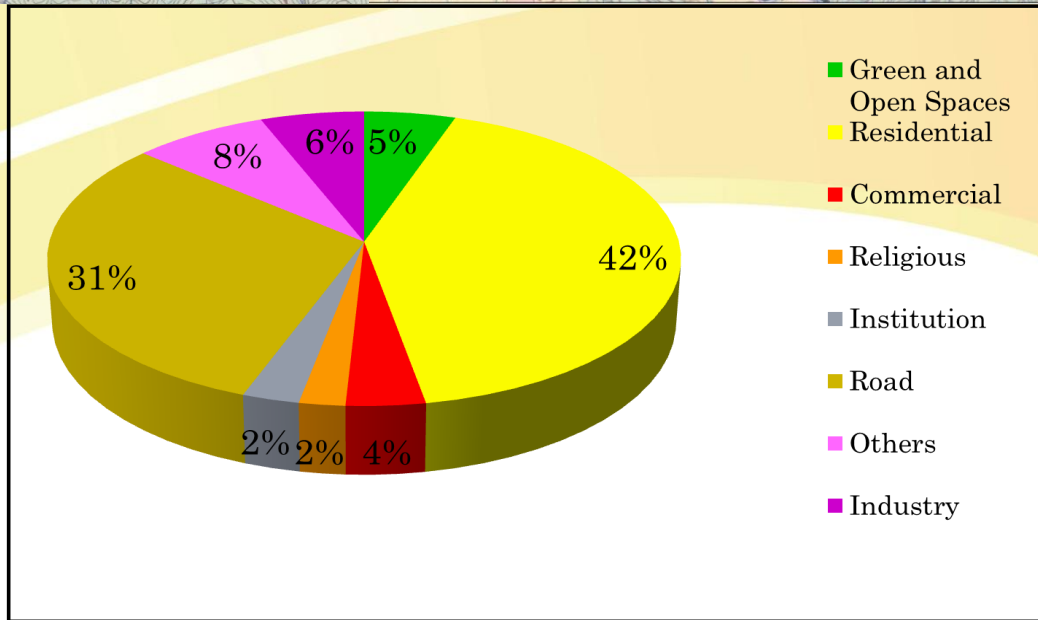
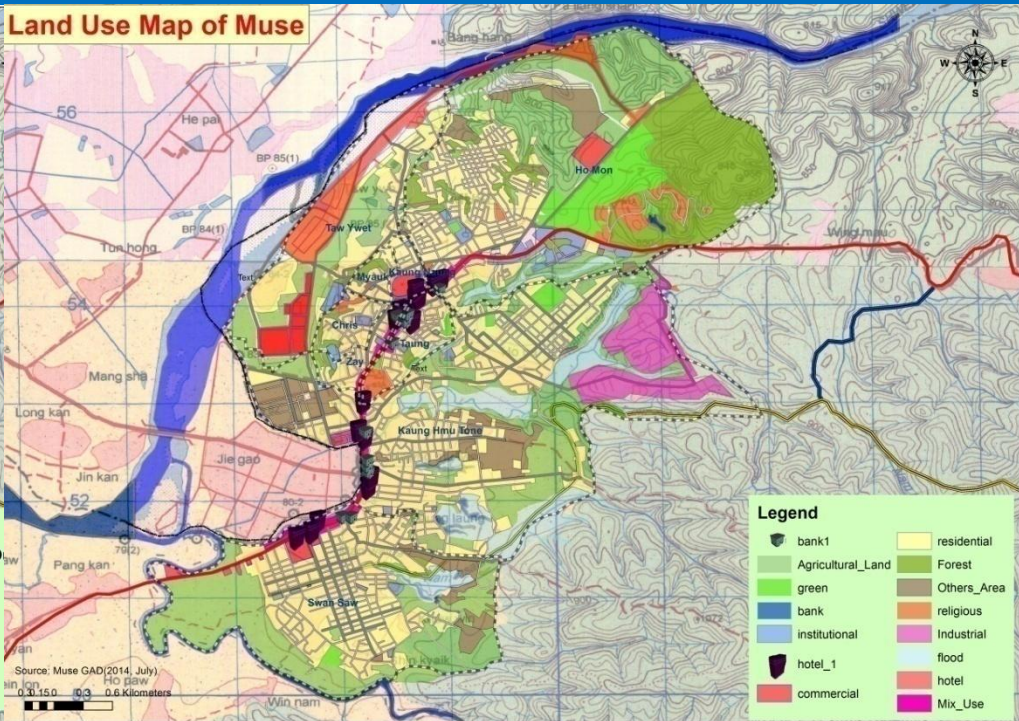
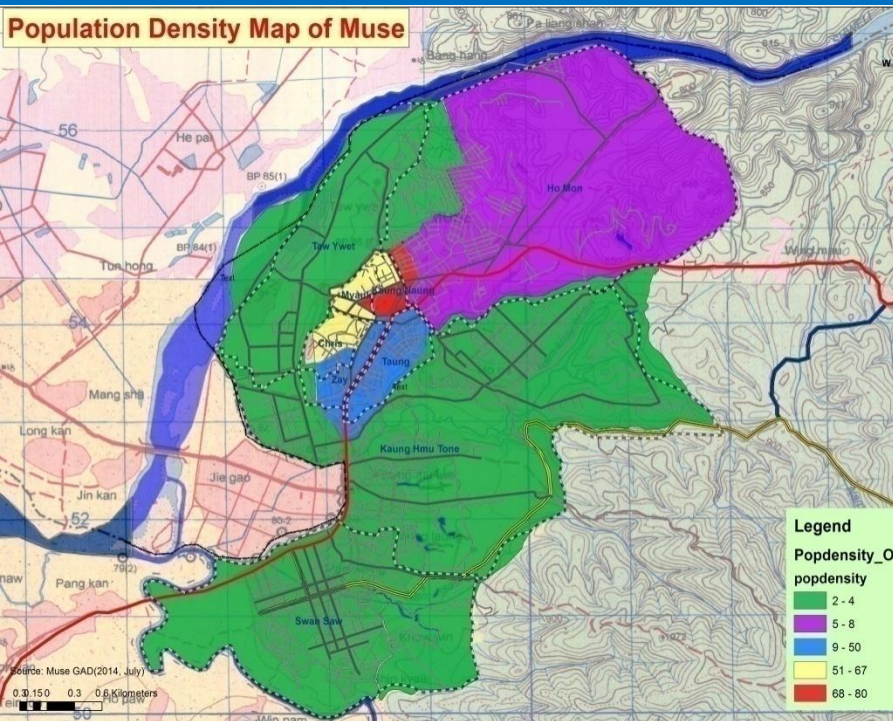
Urban and Regional Planning of Potential Cities in Myanmar

Land Use Map of Tachileik



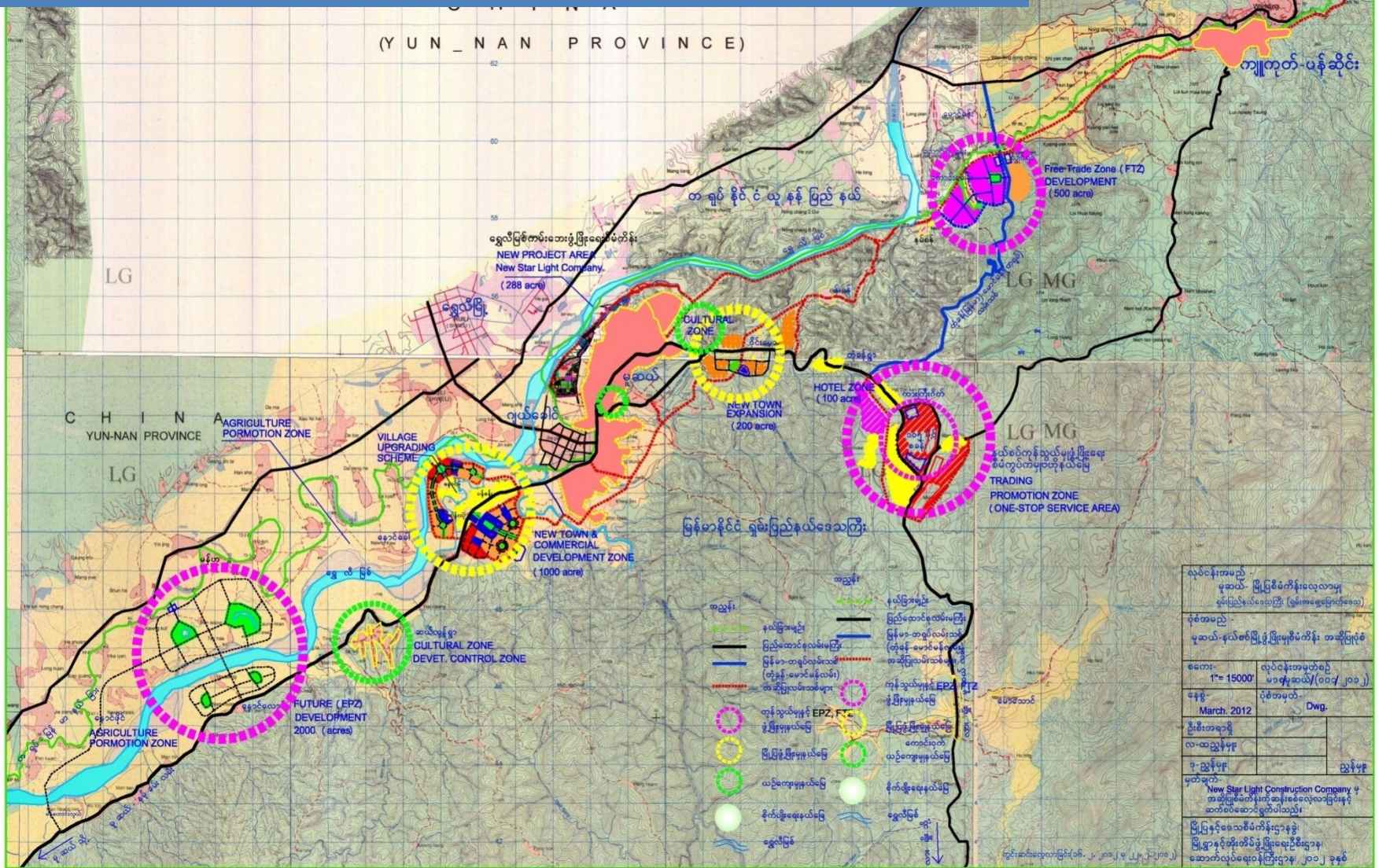
Source Form= GAD-Tachileik

Urban and Regional Planning of Potential Cities in Myanmar



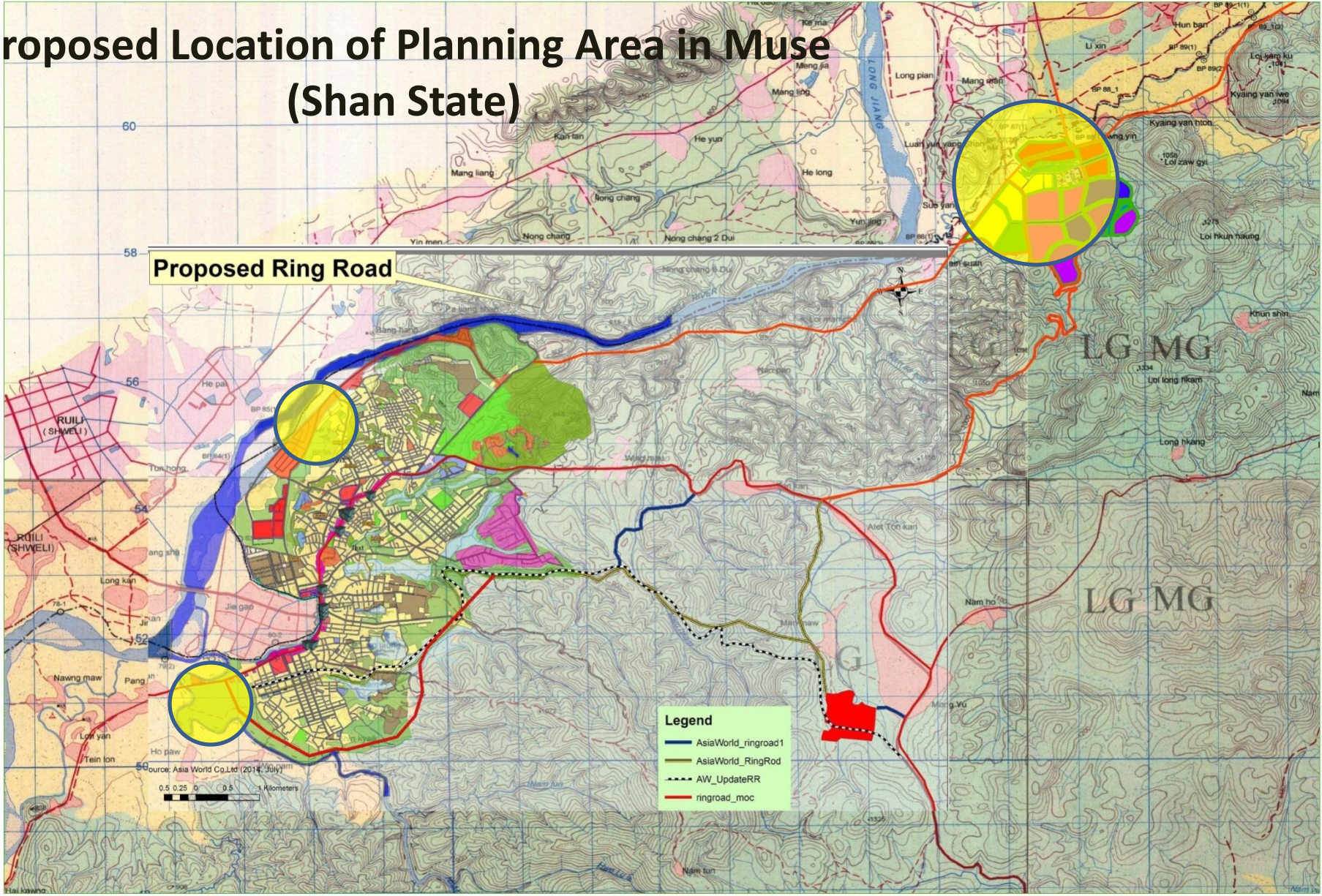
Urban and Regional Planning of Potential Cities in Myanmar

Conceptual Development Plan of Muse Region Shan State (North)



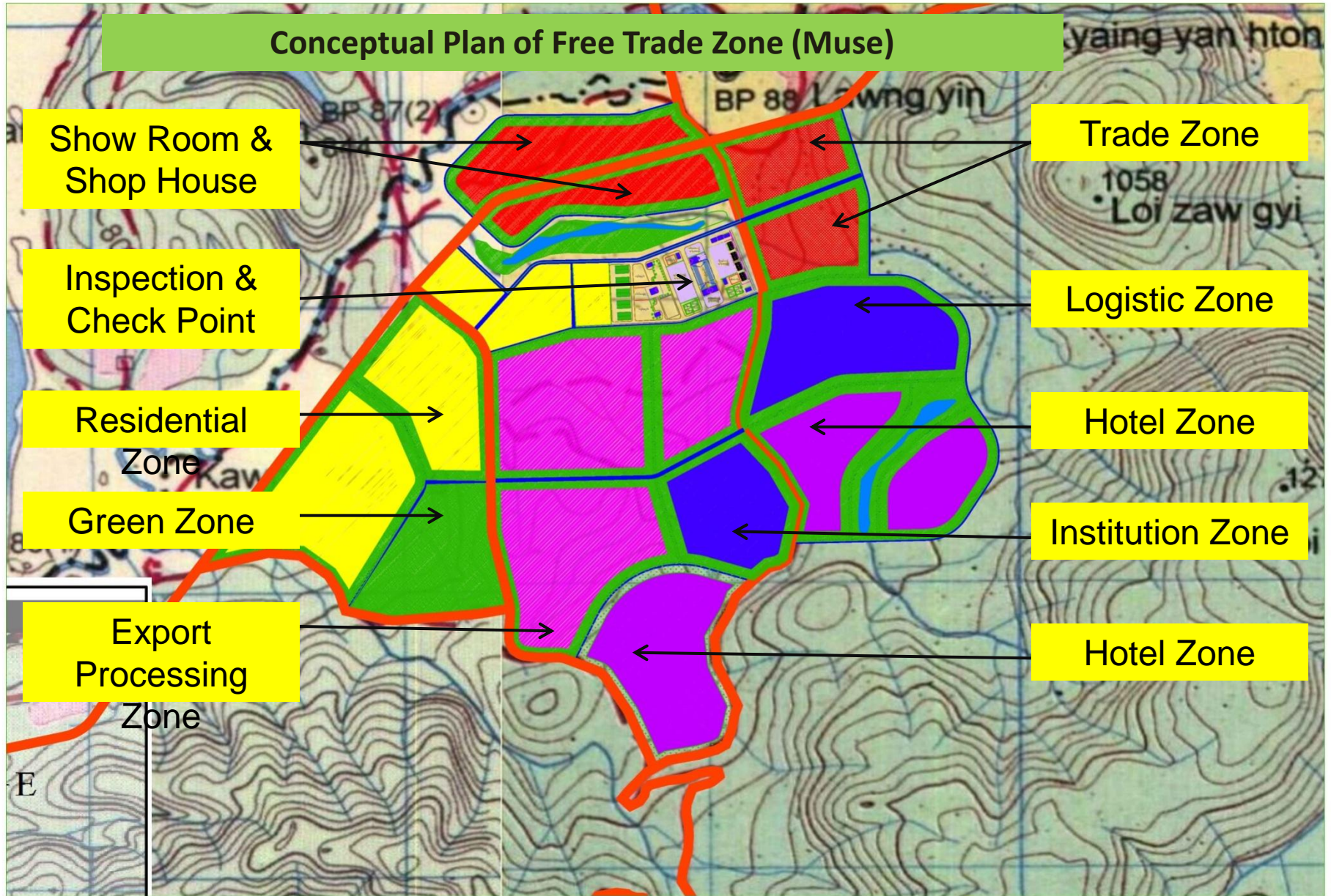
Urban and Regional Planning of Potential Cities in Myanmar

Proposed Location of Planning Area in Muse (Shan State)



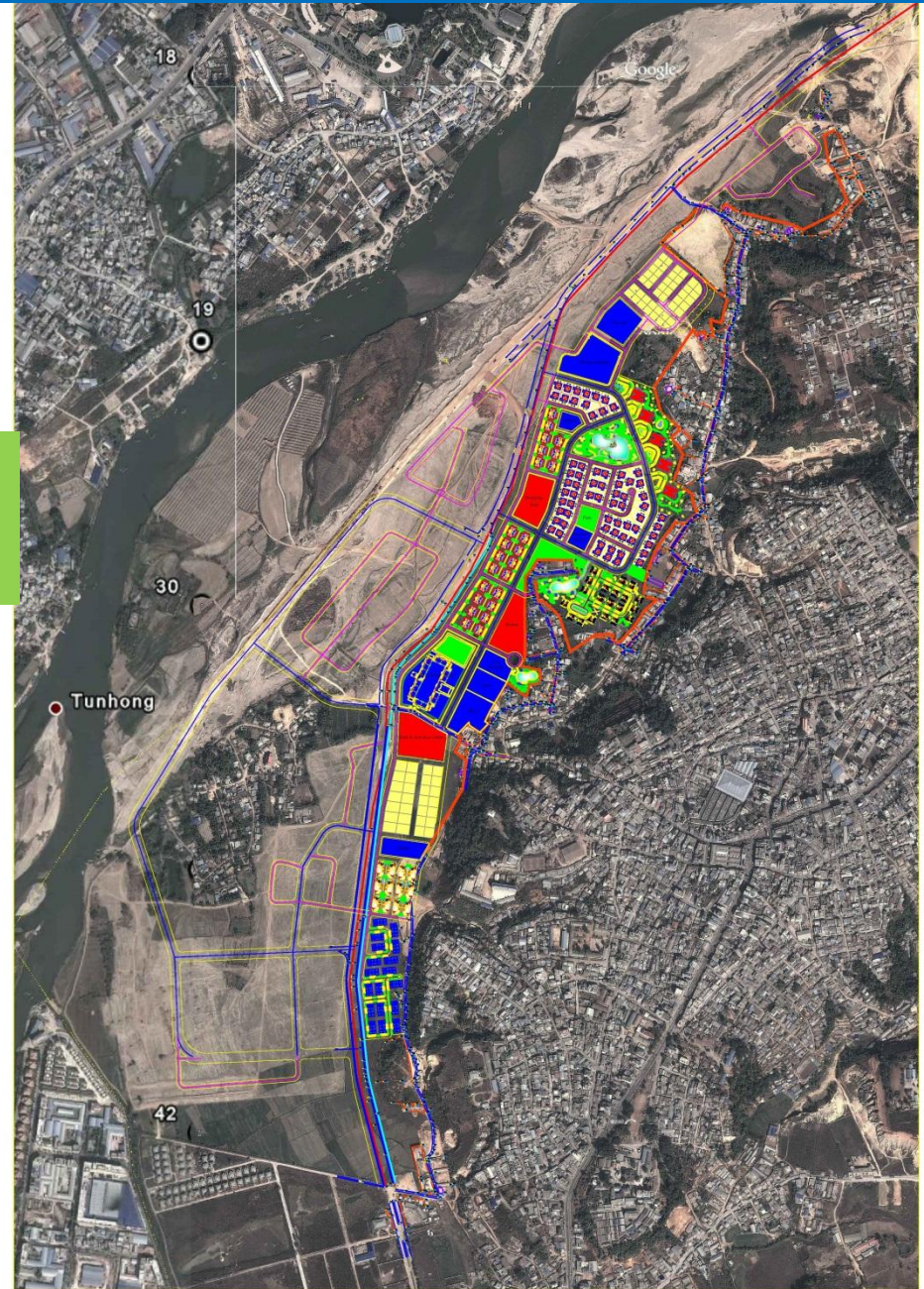
Urban and Regional Planning of Potential Cities in Myanmar

Conceptual Plan of Free Trade Zone (Muse)



Urban and Regional Planning of Potential Cities in Myanmar

Town Expansion Plan of Muse (Shan State)



Affordable and Rental Housing – Pilot project

4. MASTER PLAN_OPTION C

AERIAL VIEW OF PARCEL C, D, E & F

DAGON SEIKKAN



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 10 to 20 years**
- **Housing Financing System (CHD Bank)**
- 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

- (1) MoU with UN- Habitat in (5) project areas such as Urban Research and Studies through Urban Research and Development Institute- URDI, disaster risk reduction, technical assistance in low cost housing sector(URDI is an institution platform to undertake Urban Related Research and Studies linked to policy formulation and to establish capacity building initiatives)**
- (2) Items under MoU is signed with Cologne University in the area of city profiling focused on 56 major urban centers++++
Survey and Analysis of the data connected with development potentials of selected major urban centers plus cities of State and regions, and border areas) in Myanmar**
- (3) Technical Assistance in formulating the conceptual Plan for Yangon city and surrounding areas collaboration with URDI in the area of capacity building**

DHSHD ALWAYS SERVING FOR BETTER LIVING



*Further Corporation with
International Community in
Urban & Housing Development
Activities*

*Towards Integrated, Balanced
Growth and Sustainable
Development*

For more information:
mietinmie@gmail.com
ayengemmt@gmail.com
hlaingmawoohock@gmail.com
Zawzawayedhshd.71@gmail.com

Thank You