

The Study on Integrated Development Strategy for Danang City and Its Neighboring Area in the Socialist Republic of Vietnam (DaCRISS)

FINAL REPORT / Annex 8
Presentation Materials

December 2010

ALMEC Corporation
International Development Center of Japan

EID

JR

10-194

**JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)
DANANG PEOPLE'S COMMITTEE**

**THE STUDY ON INTEGRATED DEVELOPMENT STRATEGY
FOR DANANG CITY AND ITS NEIGHBORING AREA
IN THE SOCIALIST REPUBLIC OF VIETNAM
(DACRISS)**

FINAL REPORT

ANNEX 8

PRESENTATION MATERIALS

December 2010

**ALMEC CORPORATION
INTERNATIONAL DEVELOPMENT CENTER OF JAPAN**

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STEERING COMMITTEE MEETINGS



1st Steering Committee Meeting
on
The Study on Integrated Development Strategy for
Danang City and Its Neighboring Area
(DaCRISS)

Discussions on the Inception Report

10 July 2008
JICA Study Team

TOPICS

- ★ Background
- ★ Study Objectives
- ★ Study Area
- ★ Main Considerations in the Study
- ★ Work Plan
- ★ Study Implementation
- ★ Undertakings

■ **Study Background**

- A need to respond to rapid urbanization and industrialization through development of Medium-sized cities including Danang City
- A need for accelerating of competitive growth and development of the Central Focal Economic Zone
- A need to formulate workable and effective strategies for the region in general and Danang City in specific manner

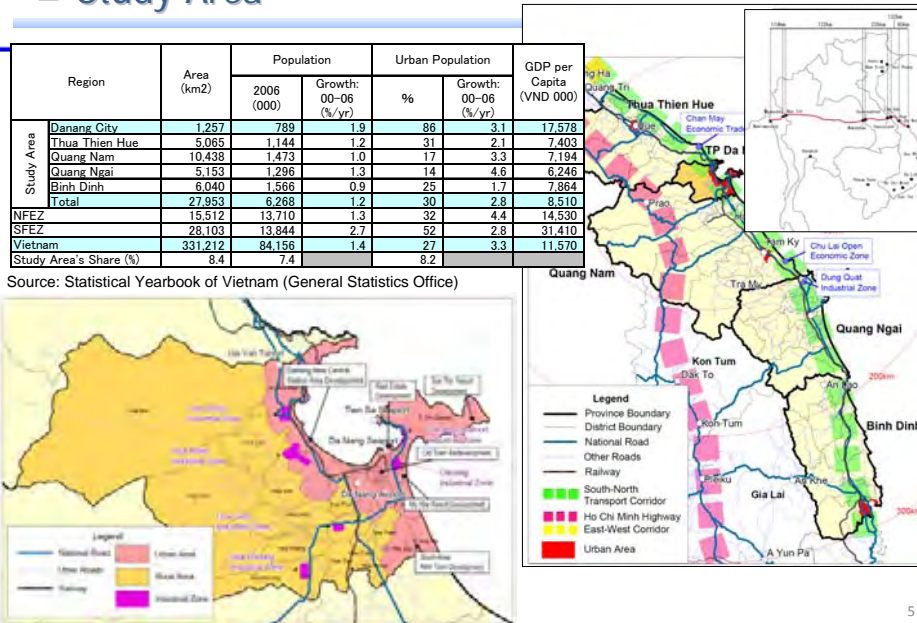
■ **Study Objectives**

- To formulate urban and regional integrated development strategies for Danang City and its neighboring provinces;
- To formulate a short-term action plan up to 2015, including prefeasibility studies for selected priority projects; and
- To undertake capacity building, focusing on urban planning and development, for the responsible organizations and staff.

■ **Main Outputs of the Study**

- Development Strategy for the Central Focal Economic Zone;
- Urban Development Master Plan for Danang City up to 2025;
- Urban Transportation Program for Danang City;
- Comprehensive Environment Program for Danang City;
- Implementation plans up to 2015; and
- Urban planning database based on GIS and capacity development covering institutions and human resources

Study Area



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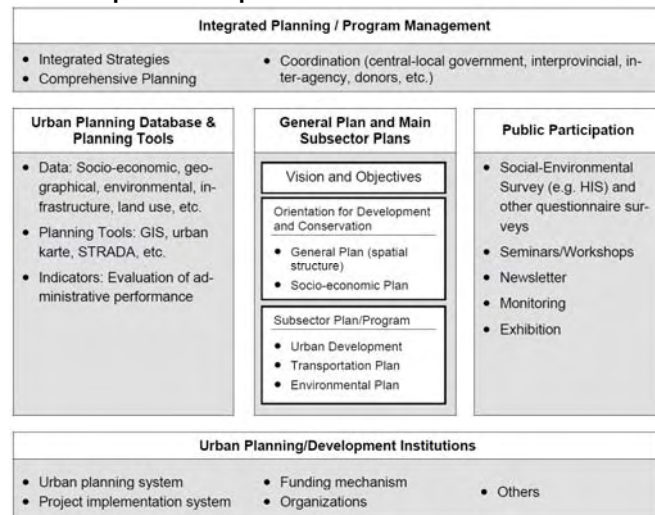
Key Development Issues

- Confirm a competitive growth scenario for the Central Focal Economic Zone (Study Area)
 - ✓ not the same one as NFEZ and SFEZ
- Formulate development / growth management strategies for Danang City
 - ✓ Danang to become the engine of the growth for the region
 - ✓ Danang to become a only one city in Vietnam and Asian region
- Strengthen regional integratin and inter-provincial coordination
 - ✓ Strengthened connectivity with NFEZ, SFEZ, and the world
 - ✓ Strengthened connectivity among Danang City and provinces
 - ✓ Effective urban-rural integration

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Formulation of Workable Urban Master Plan

Basic Structure and Components of Proposed Comprehensive Urban Master Plan



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Key Considerations in Planning Work

- Integrated planning / program management
 - ✓ Integration of socio-economic plan, urban sector plans and environmental plan
 - ✓ Integration of visions, strategies, plans, projects / actions
 - ✓ From project to program
- Implementation mechanism
 - ✓ Much needed in all cities in Vietnam
 - ✓ Various methods will be introduced in the study for considerations of Danang City and MOC
- Participation and monitoring
 - ✓ Top down Urban Master Plan will no longer effectively work
 - ✓ Danang City is expected to provide a model

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Overall Study Framework

- Task 1: Preparatory work
- Task 2: Collection of necessary data and analysis of existing conditions
- Task 3: Vision and strategies
 - ✓ 3A: Development strategies for CFEZ
 - ✓ 3B: Danang City development strategy
- Task 4: Urban Development Master Plan
- Task 5: Urban Transport Program
- Task 6: Sustainable urban environmental program
- Task 7: Support for Strategic Environmental Assessment and Environmental and Social Considerations
- Task 8: Implementation plan
- Task 9: Capacity development
- Seminars/Workshops
- Steering Committee meetings
- Reports

Year/ Month	TASK / WORK ITEMS	SC_Report Seminars										
2008/6	Task 1: Preparatory Work	Inception Report										
7	Task 2: Collection of Necessary Data and Analysis of Existing Conditions	1 st S/C										
8	<table border="1"> <tr> <td>2.A Related to Central Focal Economic Zone Development</td> <td>2.B Related to Da Nang City Development Strategies</td> <td>2.C Related to Da Nang Urban Transport Planning</td> <td>2.D Related to Comprehensive Environmental Planning</td> <td>2.E Supplemental Surveys <ul style="list-style-type: none"> Comprehensive Household Interview survey Commune survey Establishment survey Traffic survey Others </td> </tr> <tr> <td colspan="5">2.F Planning Issues and Agenda</td> </tr> </table>	2.A Related to Central Focal Economic Zone Development	2.B Related to Da Nang City Development Strategies	2.C Related to Da Nang Urban Transport Planning	2.D Related to Comprehensive Environmental Planning	2.E Supplemental Surveys <ul style="list-style-type: none"> Comprehensive Household Interview survey Commune survey Establishment survey Traffic survey Others 	2.F Planning Issues and Agenda					Seminar (1)
2.A Related to Central Focal Economic Zone Development	2.B Related to Da Nang City Development Strategies	2.C Related to Da Nang Urban Transport Planning	2.D Related to Comprehensive Environmental Planning	2.E Supplemental Surveys <ul style="list-style-type: none"> Comprehensive Household Interview survey Commune survey Establishment survey Traffic survey Others 								
2.F Planning Issues and Agenda												
9	Task 3: Vision and Strategies	Seminar (2)										
10	<table border="1"> <tr> <td>3.A Development Strategies for Central Focal Economic Zone <ul style="list-style-type: none"> Review existing regional plans Consider regional development strategies </td> <td>3.B Da Nang City Development Strategies <ul style="list-style-type: none"> Review existing plans Formulate vision and strategies Formulate growth management scenario </td> </tr> </table>	3.A Development Strategies for Central Focal Economic Zone <ul style="list-style-type: none"> Review existing regional plans Consider regional development strategies 	3.B Da Nang City Development Strategies <ul style="list-style-type: none"> Review existing plans Formulate vision and strategies Formulate growth management scenario 	2 nd S/C								
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11	Task 4: Urban Development Master Plan <ul style="list-style-type: none"> Prepare socio-economic and development framework (2009) Formulate spatial structure plan Prepare necessary subsector plans 	Progress Report										
12	Task 7: Strategic Environmental Assessment & Social Consideration	3 rd S/C										
2009/1-2	Task 5: Urban Transport Program <ul style="list-style-type: none"> Transport network plan Transport service plan 	Interim Report										
3	Task 6: Sustainable Urban Environmental Program <ul style="list-style-type: none"> Plan for urban services Environment management plan 	4 th S/C										
4	Task 8: Implementation Plan	Seminar (3)										
5	Task 9: Capacity Development	Draft Final Report										
6		5 th S/C										
7		Seminar (4)										
8		Final Report										
9												
10/11												

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★ Task 1 Preparatory Work

- Review of available data and information, plans, studies and projects
- Initial field surveys
- Mobilization
- Inception Report
- Others

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★ Task 2 Collection of Necessary Data and Analysis of Existing Conditions

- Task 2A On Central Focal Economic Zone development
 - ✓ Construction plan prepared by MOC
 - ✓ Socio-economic Development Plan prepared by MPI
 - ✓ Provincial Plans
- Task 2B On Danang City development strategies
 - ✓ Existing Urban Master Plan
 - ✓ Coordination with DOC activities on update of Construction Plan
- Task 2C On Urban transport planning
 - ✓ Existing Transportation plans / projects
 - ✓ Coordination with VITRANSS2 by MOT-JICA
- Task 2D On Comprehensive environmental planning
 - ✓ Plan for Danang – An Environmental City by DONRE
 - ✓ Priority Infrastructure Investment Project by WB
- Task 2E Conduct of Supplemental Surveys
 - ✓ Comprehensive Household Interview Survey (HIS) for Danang City
 - ✓ Commune Survey for the Study Area
 - ✓ Establishments Survey for Danang City and other Provinces
 - ✓ Traffic Surveys for Danang City and others
- Task 2F Identification of Planning Issues and Agenda

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★ Comprehensive Household Interview Survey (HIS)

- To obtain comprehensive information on socio-economic characteristics, travel pattern, needs and satisfaction on urban services of the people residing in Danang City
- Interviews with total of 5,000 households and their members in 47 communes
- Need for establishing a good survey team and cooperation of the city and people

Main Items in Questionnaire

- A Socio-economic Information
- B Trip Information
- C Opinions and Satisfactions on:
 - ✓ Travel / transport conditions
 - ✓ Transportation policies
 - ✓ Urban services
 - ✓ Living conditions
 - ✓ Housing
 - ✓ Water supply
 - ✓ Sanitation
 - ✓ Landscape
 - ✓ Others
- D Expectations for future development

Note: Please see draft Questionnaire form

A8-4

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★ Commune Survey

- To obtain information on socio-economic characteristics, problems, needs and opinions of communes
- A total of 671 communes in the study area will be covered
- Need for cooperation of Provinces and commune leaders

Main Items in Questionnaire

- A Profile of Communes
- B Profile of Villages
- C Assessment on existing conditions and problems, needs and satisfaction on:
 - ✓ Infrastructure services
 - ✓ Livelihood
 - ✓ Environment
- D Expectation for future development

Note: Please see draft Questionnaire form

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★ Survey on Establishments

- To obtain information on perception / assessment on investment environment, constraints for operation and management of various types of establishments
- A total of 500 establishments will be selected in the study area including business, industries, public institutions
- Need for cooperation of City and Provinces

Main Items in Questionnaire

- A Profile of establishments
- B Assessment on existing conditions and statement on problems and constraints on
 - ✓ operation and management
 - ✓ investment environment
 - ✓ government support
- C Expectation for future development / improvement

Note: Please see draft Questionnaire form

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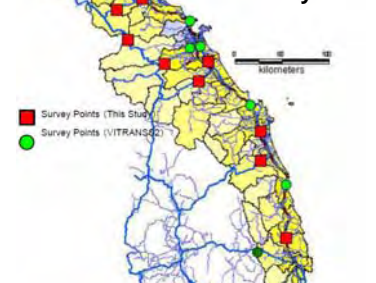
★ Traffic Surveys

- To obtain updated traffic data
- To formulate comprehensive urban traffic database together with the results of HIS
- Type of Traffic Surveys:
 - ✓ Cordon line survey
 - ✓ Screen line survey
 - ✓ Roadside OD Interview Survey
- Need for cooperation of City and Provinces, particularly police departments

Cordon Line and Screen Line Survey Points



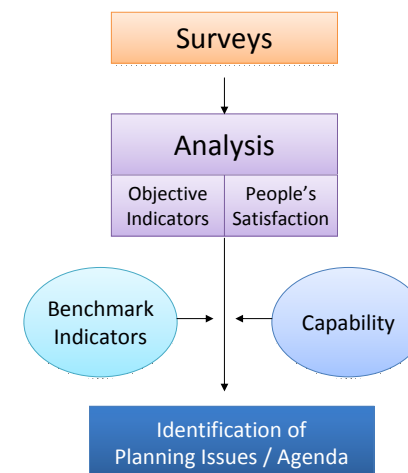
Roadside OD Traffic Volume Survey Points



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★ Task 2F Identifications of Planning Issues and Agenda

- Accurate assessment of existing conditions is important
- Statement of the analysis results must be clear and understood by the people
- Benchmark indicators must be realistic ones

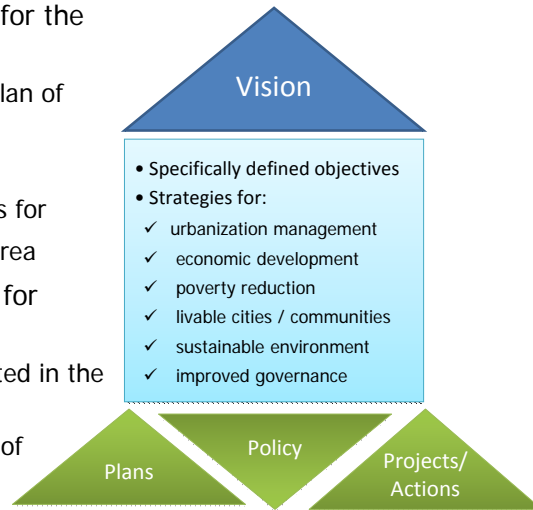


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★ Task 3 Formulation of Vision and Strategies

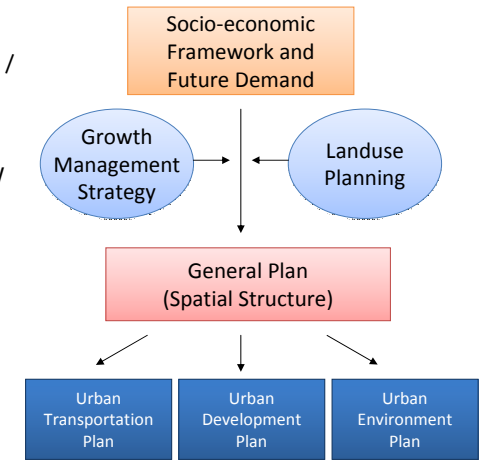
- Development strategies for the Study Area (CFEZ)
 - ✓ Inputs to Construction Plan of MOC
 - ✓ Inputs to SEDP of MPI
 - ✓ Further defined strategies for Provinces in the Study Area
- Development Strategies for Danang City
 - ✓ Review of strategies stated in the existing plans / policies
 - ✓ Reinforcement / update of development strategies



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★ Task 4 Formulation of Urban Development Master Plan for Danang City up to 2025

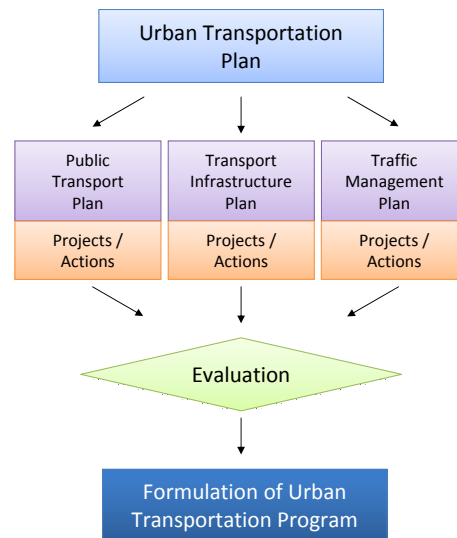
- Close coordination with DOC for update of Urban Master Plan
- Discussions on comprehensive / integrated urban development planning
- Considerations on participatory planning process and capacity development



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★ Task 5 Formulation of Urban Transportation Program

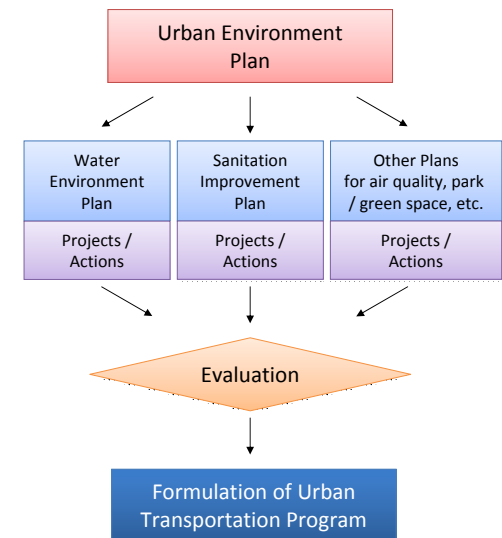
- Prepare a list of projects / actions with their profile
- Evaluate them in accordance with agreed criteria for priority ranking
- Formulate urban transportation program including implementation modalities



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★ Task 6 Formulation of Urban Environmental Program

- Prepare a list of projects / actions with their profile
- Evaluate them in accordance with agreed criteria for priority ranking
- Formulate urban environment program including implementation modalities



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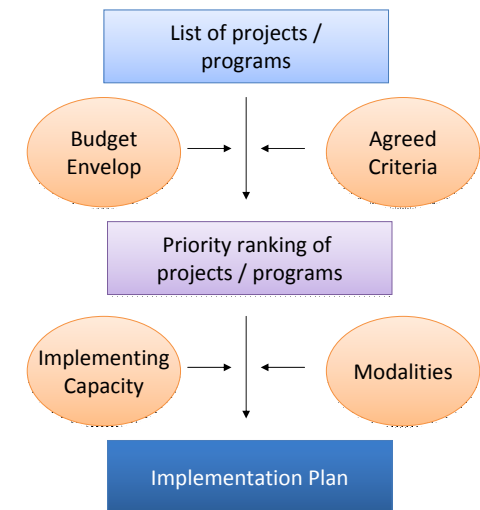
★ Task 7 Support for Strategic Environmental Assessment and Environmental and Social Considerations

- Assist Da Nang City in conducting strategic environmental assessment based on Vietnamese law;
- Conduct environmental and social considerations survey at IEE level based on JICA guidelines
- Conduct necessary supplemental surveys including lessons learned from other relevant projects

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★ Task 8 Formulation of Implementation Plan up to 2015

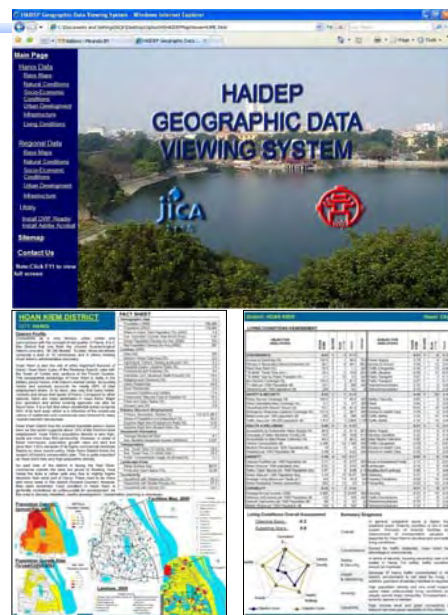
- Consolidate lists of projects / actions of all related subsectors
- Priority ranking of projects / programs within budget envelop
- Formulate workable and realistic implementation plan



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★ Task 9 Development of Urban Planning Database System and Institutional Capacity

- To design database system for future urban planning including GIS-based data system
- To contribute to standardize urban planning process and methodology
- To conduct OJT (on-the-job-training) for key concerned areas in planning
- To prepare jointly draft planning manuals



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★ Seminars and Workshops

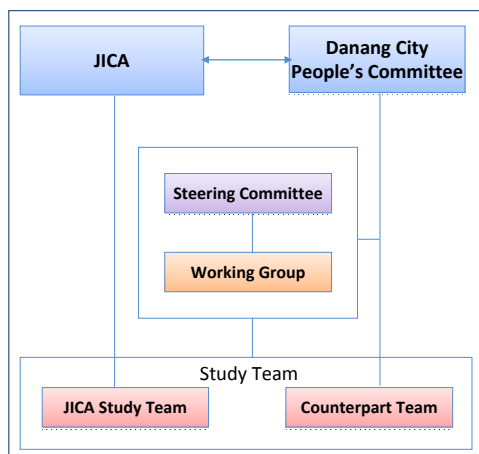
- Combined 1st and 2nd Seminar
 - ✓ to discuss issues, vision and strategies
 - ✓ about 100 participants from PCs, Departments, Associations, academia, private sectors, etc.
 - ✓ additional workshops / stakeholder meetings may be held
- 3rd Seminar
 - ✓ to present proposed draft Master Plan and draft Urban Transport Program and draft Urban Environmental Program
 - ✓ Similar arrangements as combined by 1st / 2nd Seminar
- 4th Seminar
 - ✓ to present the entire results of the Study
 - ✓ wider audiences be considered
- Workshops
 - ✓ In addition, workshops will be held to hear voices of various stakeholders when and where necessary

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■ Study Organization

- Steering Committee
- Working Group
- Counterpart Team
- Study Team
- Local Consultant Group



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■ Undertakings by Vietnamese Side

- Undertakings by Danang PC
 - ✓ access to areas / facilities related to the Study
 - ✓ provision of necessary data and information for the Study
 - ✓ coordinate with other organizations for smooth implementation of the Study
 - ✓ provision of suitable office space / equipments / furniture, internet / telephone connections
 - ✓ other necessary support for smooth implementation of the Study
- Requested permits for the Study
 - ✓ for conducting various surveys
 - ✓ for conducting seminars, workshops, stakeholder meetings

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■ Matters for Immediate Attention

- Finalization of survey implementation for early commencement
- Provision of requested data / information
- Organization of Working Group and Counterpart Team

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... thank you for your attention.

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2nd Steering Committee Meeting
on
The Study on Integrated Development Strategy for
Danang City and Its Neighboring Area
(DaCRISS)

28 November 2008
JICA Study Team

▣ Main Points of Discussion

- ★ Overall progress of the Study
- ★ Main findings on development issues in the region and Danang City
- ★ Region development framework and orientation
- ★ Danang City development scenario
- ★ Progress of planning support activities
- ★ Summary of main points for decisions
- ★ Next steps

▣ Overall Progress of the Study

- Supplemental surveys
- Field Visits
- Meetings/Interviews
- Technical Working Group Meetings
- Counterpart Team Meetings
- Situational Analysis
- Discussions on Long-term Development Strategies
- Preparation of Progress Report

Year/ Month	TASK / WORK ITEMS	SC. Report Seminars
2008/6	Task1: Preparatory Work	Inception Report
7	Task2: Collection of Necessary Data and Analysis of Existing Conditions	1 st S/C
8		
9	Task 3: Vision and Strategies	2 nd S/C
10		
11	Task 4: Urban Development Master Plan (2025)	Seminar (1)
12	Task 7:	Progress Report
2009/1-2	Task 5: Urban Transport Program	3 rd S/C
3	Task 6: Sustainable Urban Environmental Program	Interim Report
4	Task 8: Implementation Plan (2015)	4 th S/C
5		
6	Strategic Environmental Assessment and Social Consideration	Seminar (2)
7		
8	Task 9: Capacity Development	Draft Final Report
9		
10/11		2 nd S/C Seminar (3) Final Report

▣ Supplemental Surveys

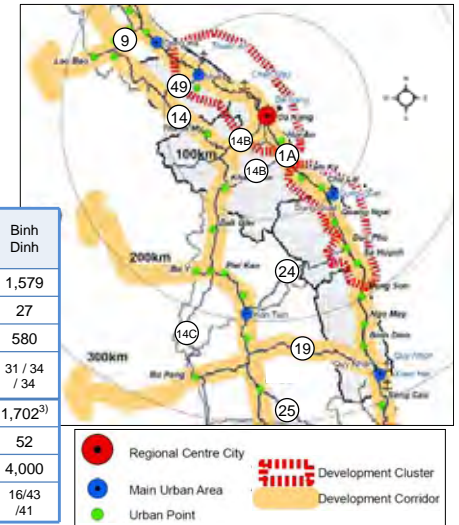
- **Preparation of updated information:**
On socio-economic activities and assessment of the people on existing conditions, problems, and future needs
- **Household Interview Survey:**
5,000 households and their members residing in Danang City
- **Commune Survey:**
A total of 792 communes located in Danang City and Thua Thien Hue, Quang Nam, Quang Ngai and Binh Dinh provinces
- **Tourist Interview Survey:**
A total of 400 tourists interviewed at Danang Airport
- **Establishment Survey:**
A total of 300 companies in Danang City
- **Traffic/Transport Surveys**

Regional Development Concept



Development Orientation in Current SEDP

- ✓ Developing the comparative advantages of the Central Region (infrastructure, inter and intra regional cooperation)
- ✓ Pursue economically, socially, and environmentally sustainable development



	Indicator	Da nang City	T.T. Hue	Quang Nam	Quang Ngai	Binh Dinh
'07	Population (000)	807	1,145	1,490	1,311	1,579
	Urban Population (%)	87	35	19	15	27
	GDP/capita (US\$)	1,170	563	530	471	580
'20	Population (000)	1,369	1,357	1,783 ³⁾	1,506 ³⁾	1,702 ³⁾
	Urban Population (%)	N. A.	70	N. A.	N. A.	52
	GDP/capita (US\$)	4,965	4,000	1,500 ¹⁾	859 ²⁾	4,000
	Employment (1/2/3) (%)	44 / 4 / 52	37 / 20 / 43	38 / 26 / 36	37 / 30 / 34	31 / 34 / 34
	Employment (1/2/3) (%)	2/43 / 56	5/47 / 47	15/44 / 41 ¹⁾	17/50 / 33 ²⁾	16/43 / 41

1) 2015 figures based on SEDP up to 2015
 2) 2010 figures Based on SEDP up to 2010
 3) Estimated

Movement of the People, 1999-2005 & 2005-2008

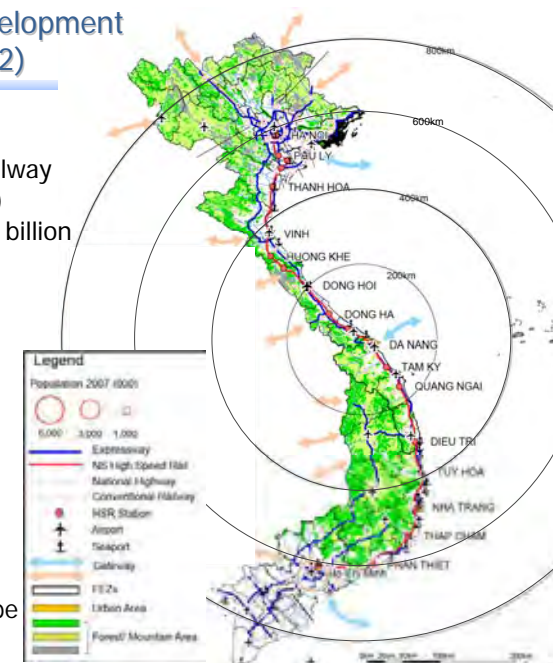
- Increasing : 162,000 (1999-2005) to 163,000 (2005-2008)

Province		From									
		Danang City		T.T. Hue		Quang Nam		Quang Ngai		Binh Dinh	
		99-05	05-08	99-05	05-08	99-05	05-08	99-05	05-08	99-05	05-08
Other FEZ	SFEZ	20.9	16.3	21.2	24.4	22.2	13.0	19.6	19.4	20.3	13.1
	NFEZ	3.8	3.4	9.2	10.3	1.1	0.6	1.8	1.8	0.1	0
CFEZ	Danang City	53.4	44.5	21.8	17.3	12.5	11.9	17.6	16.8	6.9	5.3
	Hue City	1.3	1.1	18.6	15.2	0.6	0.2	2.1	1.9	0.1	0
	Dung Quat	1.6	2.7	1.8	1.6	2.6	6.7	19.8	22.7	1.7	4.1
	Elsewhere in CFEEZ	5.3	9.0	8.2	12.3	40.7	51.8	26.8	26.1	60.6	72.1
Elsewhere in Vietnam		13.7	23.2	20.3	18.0	20.4	15.8	12.1	11.5	10.3	5.4
Total	%	100	100	100	100	100	100	100	100	100	100
	No (000)	23	20	17	23	35	31	26	25	61	64

Source: DaCRISS Commune Survey, 2008

National Transport Development Orientation (VITRANSS2)

- Transportation Strategy
 - ✓ North-South High Speed Railway 300kph New Line (1,550km)
Construction Cost = US\$ 30 billion
 - ✓ Existing Railway
 - ✓ Expressway
 - ✓ Ports
 - ✓ Airports
 - ✓ East-West corridor
- Urbanization Policy
 - ✓ Growth of secondary cities
- Integration with regional development strategies must be attended



★ Responses of Communes (Infrastructure Services)

- A need for further improvement of infrastructure

Province		Danang City	Thua Thien Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	
Coverage of Services (%)	Primary Health Care	97	94	97	84	100	94	
	Education	Primary	98	92	95	93	100	95
		Secondary	98	84	91	89	96	90
	Piped Drinking Water	72	62	65	41	51	58	
	Electricity	100	85	89	90	97	91	
	Telephone	73	48	32	20	53	40	
	Drainage	75	51	46	19	81	59	
Road Conditions	From Commune Center to District Center	Average Distance (km)	5	15	17	12	12	12
		Road Conditions 1)	0	0	10	6	0	4
		Seasonal Disruption (%)	16	36	33	87	47	48
		Vehicle Travel Time (min)	12	27	33	35	22	26
	From Commune Center to Provincial Center	Average Distance (km)	8	40	75	48	67	47
		Road Conditions 1)	2	0	9	1	0	3
		Seasonal Disruption (%)	11	39	25	79	36	41
		Vehicle Travel Time (min)	22	58	116	89	78	72

Source: DaCRISS Commune Survey, 2008

1) % who replied "bad"

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★ Responses of Communes (Environmental Problems)

(% who replied "Significant problem" or "Very severe problem")

- Overall environment situation is considered relatively good except flooding, air pollution in Danang and deforestation / soil erosion / landslide in Hue

	Danang City	Thua Thien Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	
Groundwater Pollution	20	7	0	0	0	3	
Surface Water Pollution	18	8	0	0	0	3	
Saline Intrusion	2	4	0	0	1	1	
Soil Pollution	2	3	0	0	0	1	
Solid Waste	7	2	0	1	0	1	
Air Pollution	18	9	0	4	0	4	
Deforestation	5	20	5	9	9	10	
Soil Erosion	5	22	4	8	3	8	
Landslide	11	34	3	6	2	10	
Desertification	0	1	0	0	0	0	
Flooding	Gradual Inundation	5	34	2	35	36	23
	Flash Floods	13	25	12	19	5	15
	Storm Surges	7	5	0	1	0	2

Source: DaCRISS Commune Survey, 2008

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★ Responses of Communes (Constraints to Development)

(% who replied "Major obstacle" or "Severe obstacle")

- While skilled labour and capacity of people are considered as major constraints to development in the region, other constraints vary by province

Province		Danang City	Thua Thien Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ
Infrastructure and Service Factors (%)	Road Access	20	24	50	43	20	35
	Power Supply	2	13	45	36	1	25
	Water Supply	14	60	10	55	87	46
	Drainage	41	19	4	46	0	18
	Education Services	4	16	46	14	4	22
	Health Services	9	16	48	18	4	23
Required Inputs to Facilitate Development (%)	Land for Agricultural Production	29	8	11	11	60	22
	Land for Housing	16	3	15	1	20	11
	Land for Enterprises	30	7	25	13	8	16
	Skilled Labor	50	68	66	91	91	76
	Knowledge and Capacity of People	38	70	67	97	53	69
	Access to Credit	21	39	55	98	15	51
	Price of Physical Inputs	50	20	44	92	6	43

Source: DaCRISS Commune Survey, 2008

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★ Responses of Communes (Development Potentials)

(% who replied "High potential" or "Very high potential")

- Agriculture, eco tourism and services are considered as sectors with relatively high potential

Province		Danang City	Thua Thien Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ
Agricultural Products	Crops	13	16	36	10	1	18
	Livestock	9	7	28	13	22	18
	Aquacultural	13	28	9	16	15	16
	Forestry	11	28	43	37	36	35
Processing Agricultural, Aquacultural, and Forestry Products		13	17	8	28	15	16
Mining and Other Extractive Industry		4	13	4	15	0	7
Household Craft Industry		16	11	15	14	20	15
Tourism	Mass	9	16	6	2	1	6
	Eco	23	28	13	3	35	19
Manufacturing Industries		7	3	5	13	2	6
Construction		4	3	3	16	13	8
Shops / Commercial		38	34	13	28	25	25
Other Services		25	26	8	4	25	15
Other Industrial		23	1	3	2	0	3

Source: DaCRISS Commune Survey, 2008

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Assessment of the Region

Weakness and Threats

- Small local market (small population & low income)
- Distance from growth centre
- Poor integration between provinces
- Inadequate infrastructure
- Unknown to the world

Strength and Opportunities

- Rich natural / cultural resources
- Strategic location in the country and GMS region
- Strong policy commitment of the Government for growth
- Potential quality human resource

- ✓ Maximize potentials through “**integration**” to enlarge and strengthen capacity of and as the region
- ✓ Appeal to the world to promote investment (capital, technology, visitors)
- ✓ Provide more active Central Government intervention for take-off before establishing sustainable growth

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Proposed Vision and Strategy for CFEZ

ECO-TECHS Region ★ INTEGRATION: Core Planning Principle ★

- Economic Development
- Ecological balance
- Ethnological harmonization

through

- Technology oriented solutions
- Enhanced environmental management
- Cultural value preserved
- Human resource developed
- Strategic infrastructure provided

- Spatial Integration : international, national, provincial and local levels
- Sectoral Integration : economic, social, environmental, urban-rural, infrastructure-service, ...
- Institutional Integration : Central-local government, inter-provincial, inter-department, public-private, ...

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Modified Spatial Structure

Development Clusters

- ✓ Hue – Danang – Hoi An
- ✓ Chu Lai – Dung Quat
- ✓ Quy Nhon

Development Corridors

- ✓ North – South – Central
- ✓ North – South – Upland
- ✓ East – West (international)
- ✓ East – West (local)

Urban Centers



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Possible Role-Sharing Among CFEZ Provinces (Tentative)

Main Agenda	T.T. Hue	Danang City	Quang Nam	Quang Ngai	Binh Dinh	
Gateway Function	B	(A)	C	B	C	
Strategic Development Themes	Tourism	(A)	(A)	(A)	A	A
	Industry	B	B	C	(A)	B
	Services	A	(A)	B	A	B
	Environmental Business	B	(A)	A	B	B
	Human Resource Dev.	B	(A)	B	B	B
	Environmental management	(A)	(A)	(A)	(A)	(A)
Cultural Value Enhancement	(A)	B	(A)	B	B	
Urban Development	(A)	(A)	(A)	(A)	(A)	
Rural Development	(A)	B	(A)	(A)	(A)	

A: Primary role, B: Secondary role, C: Minor role

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■ Approach to Assessment of Development Scenario

Sustainability	Scenario 1 : Baseline (Do Nothing)	Scenario 2 : Existing Plan	Scenario 3 : Enhanced Integration
Economic : • Global competitiveness • Complimentality in Vietnam • CFEZ integration			
Social : • Poverty free • Reduced in equality • Access to services			
Environment : • Ecology protected • Pollution free • Disaster preparedness			
Governance : • Good management • Financial sustainability • Community involvement			

★ Proposed Basic Orientation ★

- ① **Respond to existing demand and needs** of communes
 - Formulate step-wise comprehensive infrastructure development program for the region for external funding
- ② **Attend common issues among provinces** in the region such as human resource development, capacity building, access to credit, etc.
 - Leverage major national transport projects such as NSHSR, Expressway, etc.
 - Expand international direct air connection with main cities in Asia as well as international shipping services
- ③ **Strengthen international access to market**, information, technology and investment through expanded air and maritime transport and information system
 - Exploit east-west corridor demand
 - Strengthen telecommunication services
- ④ **Strengthen inter-provincial coordination** for strategic sector such as tourism, environment, transport, coastal management...
 - Strengthen intra-regional connectivity through network development
 - Expand tourism in coordination among provinces especially eco and culture tourism
 - Promote agricultural production matching potential of provinces
- ⑤ **Establish complementary role of the CFEZ** lead by Danang in growth strategy rather than competing NFEZ and SFEZ through new type of economic development opportunities
 - Promote handicraft industry
 - Promote private sector SMEs in commercial and service sector
 - Exploit new types of industries such as human resource development, R&D, environmental business...

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■ Further Study

- Tourism value chain analysis
- Coastal management strategy
- Transport network development
- Urban development concept for other cities than Danang
- Urban-rural linkages
- Role-sharing in industry location
- Water resource management
- Others

★ Contribution of DaCRISS ★

- Additional input to CFEZ plan
- Shared-role in investment promotion
- Inter-provincial coordination (public transport, utilities, resource management, environmental protection, disaster management etc)

➡ Conduct of provincial workshops

- ✓ to learn more about conditions of each province
- ✓ to discuss on findings/assumptions made by the study team

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Danang City Development Strategy



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Danang City : Socio-economic Profile

- ✓ Total population growth is moderate but urban population growth is high
- ✓ In employment, tertiary sector grows fast with moderate growth of secondary and negative growth of primary in employment
- ✓ Contribution of the secondary sector is the most significant

	2000	2007	Growth Rate 2000-2007 (%/yr)	
Population (000)	716	807	1.7	
Urban Population (%)	79	87	3.1	
Average HH Income ¹⁾ (VND 000)	N. A.	4,098	-	
Employment	no (000)	323	400	
	Unemployment (%)	N. A.	5.02	
	Sector (1/2/3) (%)	30 / 32 / 38	10 / 32 / 58	-9.5 / 5.7 / 12.4
Economic Indicators	GRDP (VND billion)	7,984	15,284	9.7
	Sector (1/2/3) (%)	8 / 40 / 52	4 / 47 / 49	-0.6 / 12.3 / 8.8
	FDI (00-07) (USD million)		4,751	-
	Export (US\$ mil)	235	470	10.4
	Import (US\$ mil)	316	522	7.4
Tourism Receipt (USD million)	13	32	13.9	

1) Source: DaCRISS HIS, 2008

Income Distribution

- ✓ At city level average household income is 4.1 million dong/month and increase distribution is more equal compared to Hanoi
- ✓ However, income distribution vary significantly by District
- ✓ Farther analysis will be made for low income group on their problems and needs

Household Income (%)	Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	Hanoi ¹⁾
- 1.5 million VND	9	10	8	9	19	10	28	13	27
- 2.0 million VND	8	10	9	7	11	11	23	11	18
- 3.0 million VND	17	22	27	25	31	26	26	23	23
- 4.0 million VND	15	17	20	23	19	22	12	17	15
- 5.0 million VND	18	18	16	17	9	15	7	15	8
- 6.0 million VND	10	8	9	8	4	7	2	7	4
More than 6.0 million VND	22	15	11	12	7	9	2	13	5
Average Household Income (mil VND/month)	5.0	4.5	4.2	4.1	3.2	3.9	2.5	4.1	2.7

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

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Ownership of Properties and Goods

- ✓ High ownership level of private vehicle (M/C and bicycle)
- ✓ Similar ownership level of household goods with Hanoi
- ✓ Ownership level of vehicles / household goods vary by District

Districts	Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	Hanoi ¹⁾
Commodities per household (%)	Air-con	23	15	9	4	4	6	1	11
	Washing machine	61	48	39	31	20	30	10	39
	Refrigerator	88	80	76	72	58	67	38	72
	TV	98	98	98	98	97	97	91	97
	Radio	13	7	30	8	22	7	5	13
	Computer	53	40	37	31	30	29	11	36
	Mobile phone	83	79	81	81	69	77	52	75
	Vehicle per person (%)								
Bicycle	18	18	20	27	24	24	29	21	37
Motorcycle	54	47	50	53	45	44	38	47	35
Car	1	1	0	0	1	1	0	1	1

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

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Connectivity to Urban Infrastructure and Services

- ✓ Similar or higher level of availability of urban services than Hanoi
- ✓ Service levels in Danang vary by district

Connection to (%)	Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	Hanoi ¹⁾
Utility Services	Electricity	100	100	100	100	98	100	98	100
	Piped water supply	95	86	83	46	38	57	7	67
	Toilet facility	9	9	23	0	2	14	8	10
	Gas	1	2	5	0	1	1	2	2
	Telephone	90	85	89	78	71	78	63	81
	Solid waste collection	96	99	99	85	81	96	26	85
	Sewage system	88	82	65	10	21	59	3	57
	Internet	35	25	17	12	9	11	3	19
Primary Health Care ²⁾	98	99	97	100	98	94	93	97	
Education	Primary ²⁾	100	100	100	100	85	99	97	98
	Secondary ²⁾	100	100	99	100	84	97	99	98

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005
2) Source: DaCRISS Commune Survey, 2008

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■ People's Assessment on Housing Condition and Needs

- ✓ Houses are mostly owned by households with relatively high level of satisfaction
- ✓ People want more space with good airflow and structure

		Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	Hanoi ¹⁾
Ownership (%)	Owner-occupied	98	96	96	97	99	94	98	97	92
	Others	2	4	4	3	1	6	2	3	8
Average Living Area (m2/house)		98	96	117	132	113	144	91	108	89
Satisfaction with Existing Conditions	Dissatisfied	10	16	15	18	22	17	23	16	26
	So-so	41	29	24	18	30	42	39	33	28
	Satisfied	49	56	61	64	48	42	38	51	46
Top 3 Reasons for Dissatisfaction		Space	Space	Space	Air flow	Structure	Space	Structure	Structure	Space
		Structure	Air flow	Structure	Structure	Space, Design	Air flow	Location	Space	Design
		Air flow	Location	Air flow	Space, Design	Location	Structure	Air flow	Air flow	Structure

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

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■ Housing Needs of the People

- ✓ A WB study indicates that about 19% of existing housing stock need rebuilding or substantial improvement \approx 19% of the households replied dissatisfaction on existing housing (DaCRISS)

Household Income Quintile ¹⁾	Poor Housing										Total Housing Stock	
	"Very unsafe" Environmental condition		Temporary Housing		"Very Poor" Maintenance Condition		Below 6sqm/Person		Total			
1 (20%)	206	17	3,500	39	1,236	55	9,058	49	14,206	51	29,569	20.2
2 (20%)	412	33	1,236	14	824	36	6,588	36	6,588	24	32,086	21.9
3 (20%)	412	33	3,088	34	0	0	2,265	12	5,353	19	35,848	24.5
4 (20%)	0	0	618	7	206	9	412	2	1,236	4	31,252	21.4
5 (20%)	206	17	618	7	0	0	0	0	618	2	17,639	12
Total/Percent of total HH	1,236	1	9,060	6	2,266	2	18,323	13	28,001	19	146,380	100

Source: Assessment of Housing for Low Income Groups in Danang, 2007

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■ People's Assessment on Parks / Green Space

- ✓ Parks are poorly provided in the city. Only 14% of the people can access to parks within walking distance
- ✓ More than 80% of the people think access to parks and green space is important
- ✓ For existing parks people are satisfied

		Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	Hanoi ¹⁾
Availability of Parks and Green Space in Neighborhood (%)	Within walking distance	18	15	15	40	1	15	1	14	31
	Within a reached distance	12	5	7	15	0	6	0	7	19
	No	70	80	78	45	99	79	99	79	50
Importance of Access to Park and Green Space (% of Yes)		89	78	76	100	68	84	78	82	90
Satisfaction of Parks (%)	Dissatisfied	16	18	25	11	15	28	9	18	20
	So-so	56	48	38	43	62	56	49	50	35
	Satisfied	28	34	37	45	23	16	42	32	45

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

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■ People's Request on Park Function

- ✓ Play area for children is the number one request of the people
- ✓ Greenery (trees, plants, flowers), rest area, exercise / sports area are the second important function

		Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Da nang	Hanoi ¹⁾
Top 3 Needed Function of Parks / Garden Spaces (%)	Play area for children	Play area for children	Play area for children	Play area for children	Play area for children	Play area for children	Play area for children	Play area for children	Play area for children
	Exercise/ sports area	Exercise/ sports area	Greenery (trees, plants, flowers)	Rest area	Greenery (trees, plants, flowers)	Rest area	Greenery (trees, plants, flowers)	Walking area	
	Greenery (trees, plants, flowers)	Greenery (trees, plants, flowers)	Rest area	Exercise/ sports area	Rest area	Greenery (trees, plants, flowers)	Rest area	Rest area	

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

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Landscape

- ✓ People are very much conscious on landscape and urban design

		Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	Hanoi ¹⁾
Negative Impacts on Landscape (% Yes)	Electric Wires	99	99	99	99	97	100	99	99	97
	Parking on Sidewalks	97	95	99	99	97	98	99	97	96
	Advertisement in Urban Areas	91	93	85	94	93	89	98	92	82
	Design of Buildings	81	83	74	74	68	77	79	77	77
	Overscale Buildings	86	92	75	69	75	80	91	83	77
Top 10 Favorite Landscapes (in order of ranking)	1. Han river bridge, 2. Ba Na, 3. Son Tra peninsula, 4. My Khe beach, 5. Non Nuoc beach, 6. Big C (Vinh Trung Plaza), 7. Hai Van, 8. Metro, 9. Furama resort, 10. Xuan Thieu beach									
Top 10 Unfavorite Landscapes (in order of ranking)	1. Tuy Loan Village, 2. Chi Lang Stadium, 3. 29 April Park, 4. Xuan Thieu beach, 5. Metro, 6. Softech office tower, 7. Trung Vuong Theater, 8. Indochina riverside tower, 9. People's Committee building, 10. Hai Van									

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

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Leisure Time Spending

- ✓ Not many people travel outside Danang. However the future will be different as experienced in other countries

		Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Da nang	
Travel to Outside Danang City Last Year (%)	No	73	79	71	72	84	62	91	76	
	Yes	Once	15	16	23	22	10	24	8	16
		2-3 times	9	4	4	4	2	9	1	5
		More than 3 times	4	1	1	3	4	5	0	2
Top 5 Destinations	1. Hue City 2. HCMC 3. Quang Binh 4. Hanoi 5. Khanh Hoa									
Top 5 Activities	1. Stay at home 2. Watch movies 3. Drive around the city 4. Visit relatives 5. Visit friends									

Source: DaCRISS HIS, 2008

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Assessment of Tourism

- ✓ Many people think tourism must be promoted for economic reasons

		Hai Chau	Thanh Khe	Son Tra	Ngu Hanh Son	Cam Le	Lien Chieu	Hoa Vang	Danang
Importance of Tourism Promotion (% of Total)	Yes	88	89	84	99	87	96	94	90
	So-so	6	8	11	1	10	4	3	7
	No	6	3	5	0	3	0	3	3
Type of Tourism to be Promoted (%)	Domestic tourism								21
	Ecotourism (mountains, etc.)								18
	Beach resort (mass) tourism								15
	Foreign tourism								13
	Cultural / historical tourism								12
	Marine sports (sailing, diving, sport fishing, etc)								11
	Craft village tours								4
	Entertainment (casinos, theater, etc)								3
Reason for Promoting Tourism (% of Total)	To increase employment opportunities								72
	To increase income/demand for goods from visitors								22
	To meet foreign people / people from other regions								6
Reason for Not Promoting Tourism (% of Total)	Leads to higher prices for locals								31
	Leads to resettlement of locals								29
	Leads to greater pressure on services (electricity, water, waste disposal)								20

Source: DaCRISS HIS, 2008

People's Assessment on Living Environment

(% who replied "Dissatisfied")

- ✓ People in Danang are relatively satisfied with existing living environment than those in Hanoi
- ✓ Relatively high dissatisfaction is shown on entertainment facilities, parks / green space, public transportation

Living Environment	Da nang	Hanoi ¹⁾
Greenery	27	29
Landscape	21	24
Flood	19	27
Air Quality	18	26
Tranquility	17	19
Sanitary Condition	15	20
Safety / Security	11	11
Housing	10	20

Source: DaCRISS HIS, 2008
1) Source: HAIDEP HIS, 2005

Utility Services	Da nang	Hanoi ¹⁾
Water Supply	12	38
Power Supply	9	7
Solid Waste Collection	8	12
Gas Supply	6	8
Telecom	4	5

Access to Urban Services	Da nang	Hanoi ¹⁾
To Entertainment Facilities	27	32
To Parks / Green Spaces	25	38
To Public Transportation	22	33
To Health Care Centers	12	16
To Public Administrative Office	10	19
To Market (daily supply)	9	13
To Primary School	6	7

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■ However the assessment of living environment varies by District
Numbers in () indicate the percentage of respondents who replied "dissatisfied"

- Hai Chau : access to entertainment facilities (24), greenery (23), access to parks / green spaces (21),
- Thanh Khe : **greenery (37), landscape (31), access to public transportation (25)**, access to parks / green space (24), air quality (23), access to entertainment facilities (22), tranquility (21)
- Son Tra : **access to entertainment facilities (32), access to parks / green space (29), greenery (27)**, landscape (23)
- Ngu Hanh Son: access to entertainment facilities (23)
- Cam Le : **water supply (38), flood (30)**, access to parks / green space (23), access to public transportation (22)
- Lien Chieu : **air quality (36), greenery (29), access to parks / green space (27), tranquility (26), access to entertainment facilities (26)**, sanitary condition (23), flood (23), landscape (22)
- Hoa Vang : **water supply (47), flood (42), solid waste (32), access to entertainment facilities (27), greenery (26), gas supply (26), access to parks / green space (25)**, landscape (23), air quality (22), access to public transportation (22)

Source: DaCRISS HIS, 2008

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■ Summary of Existing Conditions

- ✓ In general people are relatively satisfied with existing situation
- ✓ However, there are still much room for improvement depending on specific areas
- ✓ Consciousness of the people on environment (not only pollution but also landscape, urban design, greenery, etc.) is high

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Future of Danang City

■ Key Factors for Development in Danang City Identified by the People

- Future Vision
- Main Themes for Development

	%
Environmentally rich city supported by services and tourism	22
Growth center in central VN which can compete with Hanoi and HCMC	19
Center for culture, arts, and tourism	14
Industrial and manufacturing city exporting cheap goods to the world	14
Modern tourist city offering outdoor activities and entertainment	11
Center for hi-tech industry and education	9
Gateway to the east-west Greater Mekong Subregion corridor	5
Center for processing natural resources from the central region	5

	%
Health and cleanliness	20
Strong communities and families	17
Social harmony and equality	12
Futuristic and high-tech industry	9
Commerce and business	9
International and outward looking	8
Fun and entertainment	8
Nature and natural environment	7
Culture, history, and the arts	7
Order and careful control	4

➔ Environment City matches people's desire but people want more than pollution free

■ Redefined Vision and Goal (Assumption)

★ Danang – Environmental City beyond Pollution Free ★

- Amenity in urban area provided
- Poverty free and powerful economy promoted
- Ecological stability ensured
- Cultural value preserved
- Hospitable people in place
- Safety & security ensured

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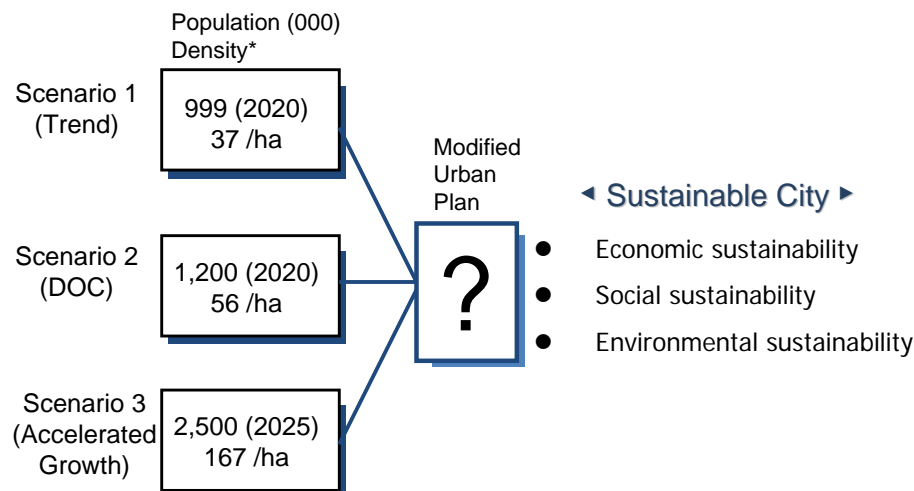
■ Suggested Development Framework for Danang City

- Danang must be strong enough to lead economic development of the central region and country in changing paradigm toward post industrial economy
- Danang must grow farther by providing much attractive investment environment and employment opportunities to meet increasing demand in the central region
- A city with 1.2-1.5 million population is unable to provide diversified services in good quality and quantity which can be competitive and function as a truly effective magnet for the growth of CFEZ must be a size with at least 2.5 to 3 million population

➔ A much enhanced growth scenario is proposed

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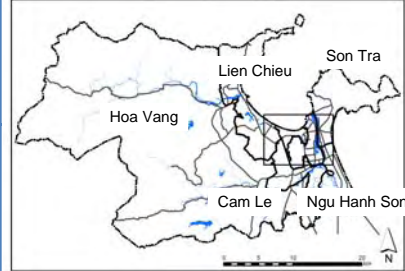
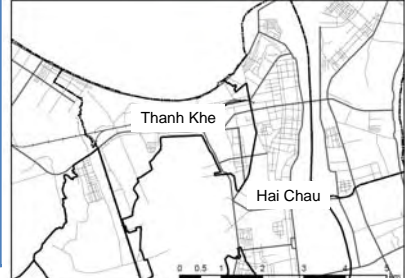
■ Urban Growth Scenario to be Considered in DaCRISS



* Net population density : person/ha for urban area

■ Scenario 1 : Trend Growth (Do Nothing)

Districts	Population (000)		Growth Rate (%/year)		Population Density (no/ha)	
	2000	2007	2000-2004	2005-2007	Gross	Net
Hai Chau	184	195	1.4	1.0	93	99
Thanh Khe	154	167	1.2	0.6	180	221
Son Tra	103	120	2.5	0.7	20	54
Ngu Hanh Son	46	54	2.4	1.2	15	17
Cam Le	60	68	2.3	3.1	21	29
Lien Chieu	66	95	2.6	2.5	11	20
Hoa Vang	105	107	0.6	0.7	2	5
Danang City Total	716	807	1.6	1.2	6	21

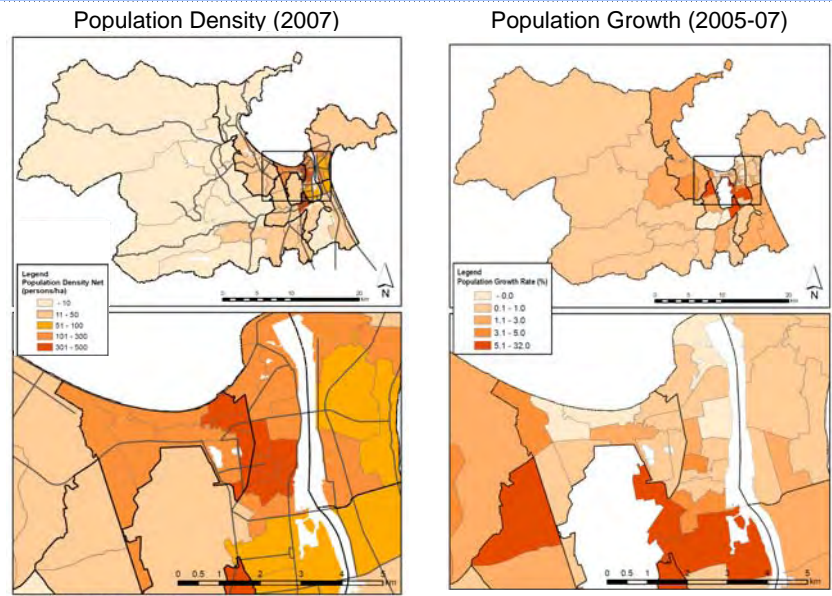



- 1) Total area
- 2) Net of water surface, forests, etc.

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- Urban area is extending towards north and south along main roads with low density in unplanned manner



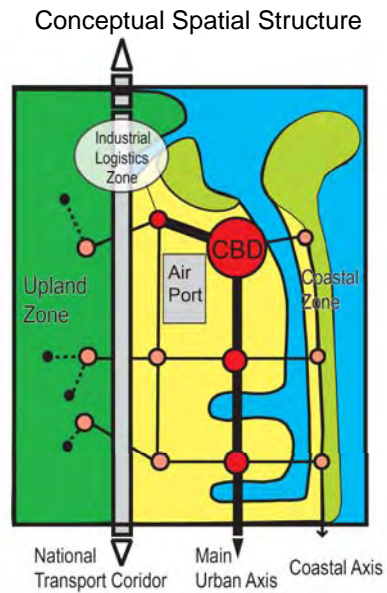
Scenario 2 : Current Construction Plan

- ✓ 2020 population: 1.2 million
- ✓ North-South direction development
- ✓ Unclear city centre
- ✓ Relatively low density



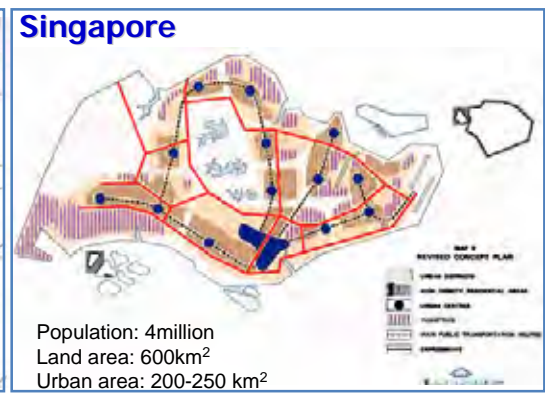
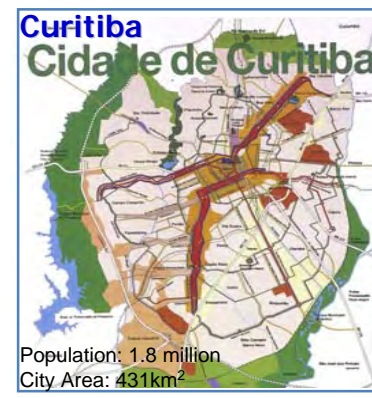
Scenario 3 : Accelerated Urban Growth

- ✓ 2025 population: 2.5 – 3.0 million
- ✓ North-South development direction
- ✓ Compact and high-density mixed land use
- ✓ Multiple urban centres
- ✓ Strong public transport corridor
- ✓ Green open space network



Examples of Good Practices

Sustainable Urban Development = Public Transport-based Urban Structure = Compact Urban Area integrated with Public Transport



■ Comparison of Alternative Scenario (Preliminary)

		Scenario 1 : Trend Growth	Scenario 2 : Current Plan	Scenario 3: Accelerated Growth
Profile	Population(000)	999 (2020)	1,200 (2020)	2.5 – 3 million (2025)
	Urban Area (km ²)	244	244	244
	Urban Population Density (persons/ha)	37	56	167
Sustainability	Economic: • Industry mix level • Investment attractiveness • Impact on the region	Low: • Ineffective land use • Investment attractiveness decreased • Little positive impact on the region	Moderate:	High: • Modern compact CBD and subcenters • Strategic locations for new industries • Strengthened integration with adjoining provinces
	Social: • Inequality • Employment • Access to services	Low: • Employment opportunity limited • Outmigration Continues	Moderate:	Moderate to High: • Expanded human resource development • Improved accessibility to services • Neighborhood community strengthened
	Environment • Pollution level • Preserved ecosystem • Disaster preparedness	Low: • Pollution spread • Ecosystem negatively affected • Vulnerability worsen	Moderate to High:	Moderate to High: • Pollution free • Ecosystem preserved • Amenity improved

■ Approach for Master Plan in the Next Step

◀ Planning Principles ▶

- Sustainable city
- Compact urban area
- Public transport oriented development
- Competitive public transport system
- Competitive/ diversified economic development
- Good living environment
- Disaster free
- Preserved Environment
- Others

◀ Strategic Planning Elements ▶

- Infrastructure (hard, soft, human)
 - ✓ linkages with global market
 - ✓ interprovincial connectivity
 - ✓ demand driven matching services
- Investment
 - ✓ FDI
 - ✓ SME
 - ✓ new investment opportunities
- Institution
 - ✓ investment environment
 - ✓ inter-organizational coordination
 - ✓ Participation & transparency

Preliminary Study on Main Subsectors

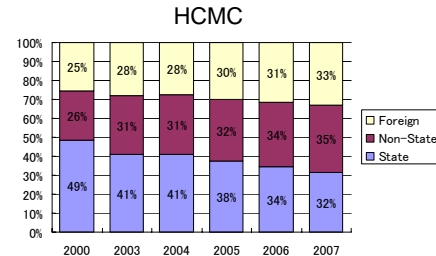
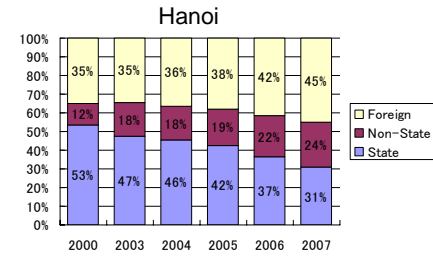
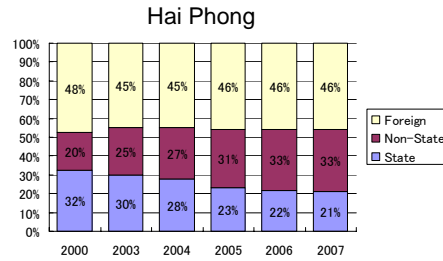
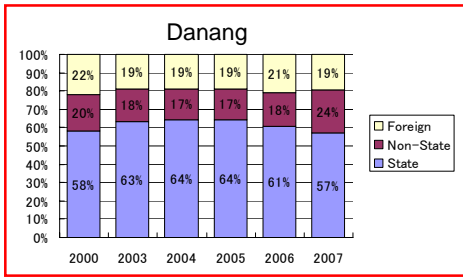
■ Economic Development : Achievement and Target

- ✓ more efforts are necessary to meet targets
- ✓ industry sector share is high but those of services increasing gradually

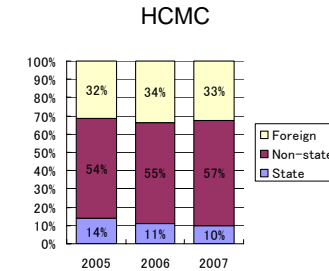
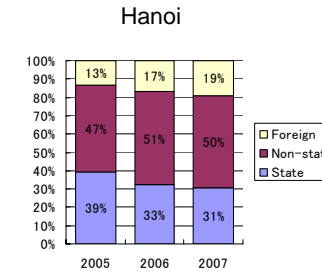
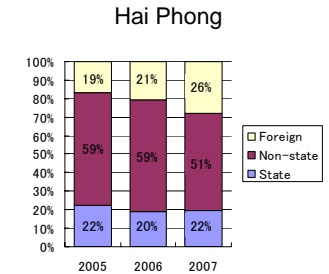
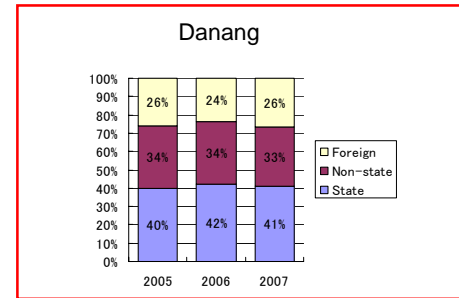
Sector	2005	2007	GDP Sector				Export			
			Agri. Forest. Fishery	Industry, Constr-uction	Servic e	Total	US\$ mil.	Growth %/yr		
Industry	18	18	4.8	20.3	7.1	13.2	309	19		
Trade / Repair	6	8	10.2	16.6	11.1	13.8	349	13		
Hotel / Restaurant	3	5	-10.2	1.3	21.3	9.0	377	8		
Personal / Public Services	2	4	2007	4.0	9.1	14.4	11.4	470	24	
Transport	4	3	TARGET	01-05	-	16.1	-	13.0	-	21-23*
				06-10	-	15.5	-	14.0	1,720**	-

* 2001-20 ** 2010

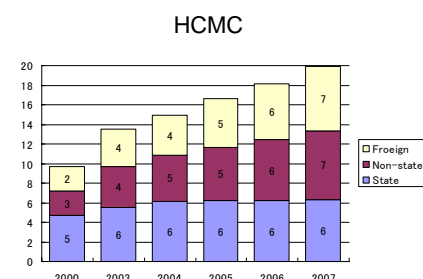
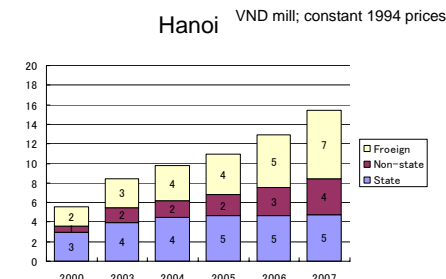
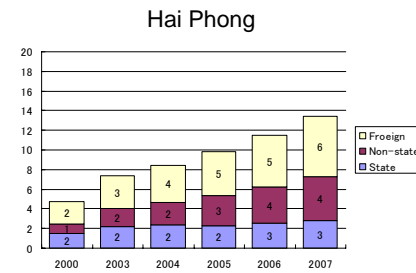
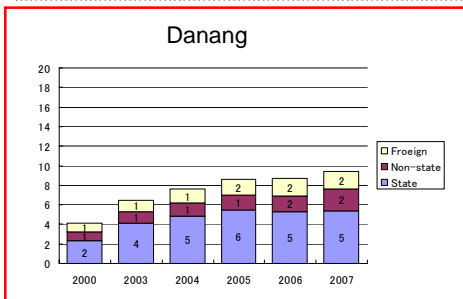
● Danang's Economic Structure is Unique: Dominated by State Sector



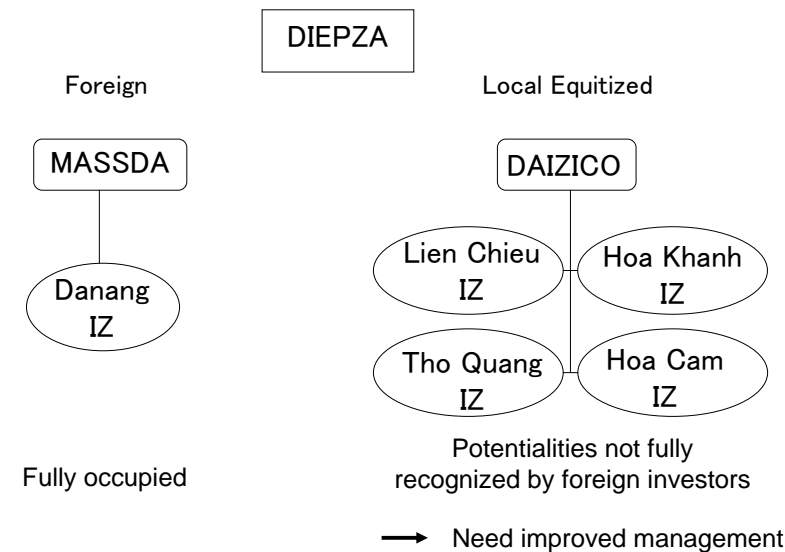
● Employment in private sector is extremely low



● Per capita gross output of industry by foreign and private sector is also very low



■ Current Institutional Setting of IZ Management in Danang



■ Suggested Directions for Accelerated Economic Development

Constraints

- Financial access
- Access to land
- Small local market
- Insufficient infrastructure
- Low income level in the region
- Unfavorable administrative procedure

Opportunities

- Rich environmental / cultural resources
- Increasing number of domestic and foreign visitors
- Transport hub for the central region
- Inflow of large amount of Foreign capital
- Attractive human resource development

- ➔ Provide more attractive investment environment than other competing areas
- ➔ Support for private entrepreneurs (business planning, marketing, accounting, human resource management...)
- ➔ Strengthen tourism and higher education sectors
- ➔ Exploit new industry such as environment technology, healthcare, etc.
- ➔ Strengthen direct links between Danang and other major hubs in Asia

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■ Tourism Development

◀ Weakness and Threats ▶

- Disintegration of tourism resource and destinations
- Relatively unknown
- Seasonality
- Lack of trained human resource
- Vulnerability to disasters
- Carrying capacity
- Inadequate infrastructure

◀ Strength and Opportunities ▶

- Diversified high quality cultural and environmental (mountain to beach) resources
- A gateway to GMS and central region
- A pivot of national land integration
- Increase in domestic and international demand
- Synergy effects through interprovincial coordination

- ➔ Strengthen gateway function to / from the world
- ➔ Integrate tourism resource / destinations in the region
- ➔ Establish more amendable and seamless environment throughout their travel

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■ Summary of Environment Issues and Options

Field/Sector	Main identified issues	Options
Land Resources	<ul style="list-style-type: none"> • Consumption of land / land reclamation with related consequences on the environment, incl. soil stability, and on the cost of service infrastructure 	<ul style="list-style-type: none"> • Orientations of the Master Plan and transport plan (refrain construction of roads and improve traffic management plan) • Strict land use policy • Strict EIA procedures • Master Planning for rural areas
Water Resource	<ul style="list-style-type: none"> • Uncertainty on the availability of WR in the long term (climate change) • Increase of the water demand in particular during dry seasons (tourism) • Salinity of the rivers • Uncertainty of ground water quality 	<ul style="list-style-type: none"> • Integrated approach to WRM (river basin management) • Construction of reservoirs? • Monitoring (incl. ground water) • Management of monitoring system
Water Supply	<ul style="list-style-type: none"> • Expansion of the distribution network • Water losses 	<ul style="list-style-type: none"> • People awareness and tariff adjustments • Water demand management policy and NRW reduction • Water services improvement
Drainage and Sewerage	<ul style="list-style-type: none"> • Under capacity for drainage • Industrial effluents not treated • Hospital effluents not treated • Lack of secondary and tertiary network • Connection of resorts • Standards not reached in many cases • Lack of master plan • Profitability of the sector 	<ul style="list-style-type: none"> • Tariff adjustment • Enforcement of regulation • Endure good performance of O&M of sewerage system • Institutional strengthening Drainage company • Sewerage fees collection

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■ Summary of Environment Issues and Options

Field/Sector	Main identified issues	Options
Solid Waste	<ul style="list-style-type: none"> • Industrial waste treatment • Medical wastes treatment • Profitability of the sector 	<ul style="list-style-type: none"> • Modernize Khan Son and develop medical solid waste treatment facility • People awareness and tariff adjustment • Industries should pay for treatment service + technical assistance • Produce and sell energy from methane • URENCO strengthening (MIS/GIS...)
Coastal Management	<ul style="list-style-type: none"> • Pollutions due to effluents (Danang Bay) 	<ul style="list-style-type: none"> • Control land reclamation
Natural and Technological Disasters	<ul style="list-style-type: none"> • Typhoons • Land slides • Coastal erosion 	<ul style="list-style-type: none"> • Rebuild natural coastal environment • Regulation / tankers • Alert system (accidental pollutions) • Arrange reservoir zones for floods in rural areas?
Natural Patrimony, People Awareness	<ul style="list-style-type: none"> • Illegal activities (hunting, cutting, fishing...) • Awareness of people to be improved, in particular vulnerable groups 	<ul style="list-style-type: none"> • Preserve tourism areas for tourists and local people • Prefer soft investments (Path, information signals, shelters for pedestrians) to heavy ones (telephonic, access roads,...) • Environmental awareness program • Educational and research efforts
Air	<ul style="list-style-type: none"> • Industrial smokes • Construction dusts 	<ul style="list-style-type: none"> • Air quality monitoring system • Law enforcement • Management of monitoring system • Promote public transport and non motorized modes (incl. traffic safety for bikers)

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Transportation Development

High mobility

Trip rate : no of trips/person/day

Mode	Including walk	Excluding Walk
Danang	2.8	2.3
Hanoi	2.7	1.9
HCMC	3.0	2.5
Kuala Lumpur	2.5	-
Bangkok	2.3	-

High Accessibility

Average Travel Time*: 14.2 minutes

Trips with less than 10 minutes : 49.9%

Trips with more than 30 minutes : 1.8%

HCMC: 19.2 minutes

Hanoi: 24.4 minutes

* excluding walking

Mode		000 Trips/day	Share (%)	
Private	Bicycle	366	17.4	
	MC	Driver	1,127	53.9
		Passenger	179	8.5
	Car	8	0.4	
	Truck	3	0.1	
	Sub Total	1,684	80.2	
Semi-Public	Taxi	2	0.1	
	Cyclo	2	0.1	
	Xeom	4	0.2	
	Private Bus	2	0.1	
	Sub Total	10	0.5	
Public	Bus	3	0.1	
Walking		403	19.2	
Total		2,101	100.0	

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High Ownership level of motorcycle

✓ 90% of households own motorcycle and 58% own more than two

✓ For income level of more than 20 million dong/month, ownership level of car sharply increase

Car Ownership (% of Household)

Income (VND mil/mo)	Danang 2008	Hanoi 2005	HCMC 2002
1.5>	0.1	0.2	0.5
1.5 – 2.5	0.0	0.5	1.0
2.5 – 4.0	0.6	1.1	1.5
4.0 – 6.0	1.1	4.0	4.6
6.0 – 8.0	3.6	7.5	6.8
8.0 – 10.0	8.1	10.3	7.7
10.0 ≤	17.8	21.1	27.2
Total	1.5	1.8	1.6

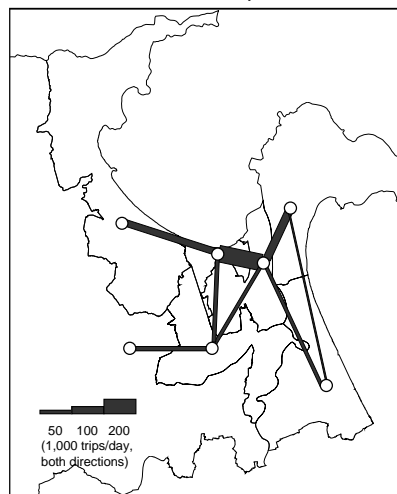
% of Household

	Danang 2008	Hanoi 2005	HCMC 2002
Car	1.5	1.8	1.7
M/C	2 ≤	58.1	44.7
	1	31.6	39.8
Bicycle	5.0	11.5	4.4
None	3.5	2.3	1.3
Total	100.0	100.0	100.0

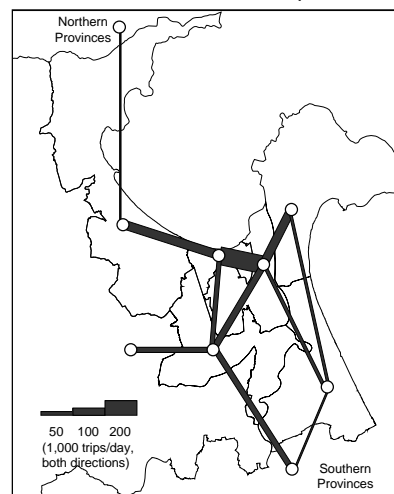
58

Traffic in the city is composed of urban trips and provincial trips

Urban Trips



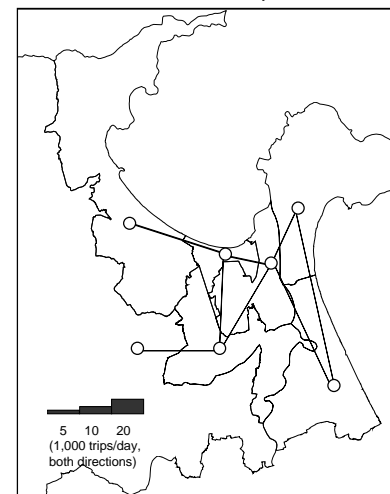
Urban + Provincial Trips



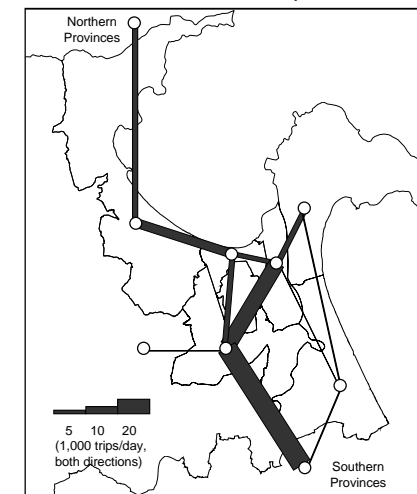
59

Bus demand is very low in urban route but relatively large in provincial routes

Urban Trips



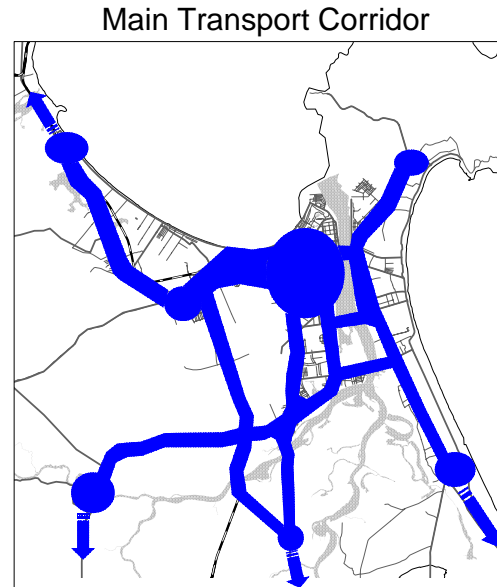
Urban + Provincial Trips



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● Approach to Urban Transport Planning

- Define main public transport corridor
- Formulate integrated land use/urban development plan : high density mixed use along the corridor
- Prepare comprehensive corridor traffic management plan : control of private car, parking, etc



▣ GIS

- Preliminary work on GIS for urban and transport planning is ongoing
- Preliminary survey on the need for GIS by City Departments has been undertaken
- Step-wise GIS development plan will be formulated in the next step

■ Next Step

- Conduct of workshops in provinces in December
- Conduct of seminar in Danang in December
- Preparation of Progress Report by the end of January
- Discussion of Master Plan with steering committee in March
- Preparation of detailed planning for environment and transportation sectors

... thank you for your attention.