

SEMINARS



Workshop in Binh Dinh Province

Department of Planning and Investment, Binh Dinh Province
10 December 2008
JICA Study Team

▣ Purpose of the Workshop

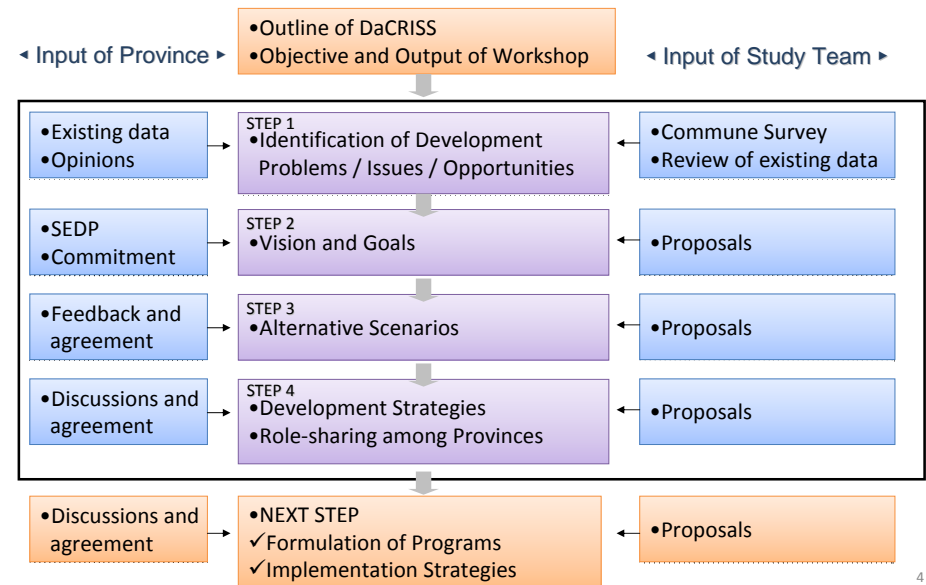
- to present a brief progress of the study
- to identify main problems and issues facing Binh Dinh Province
- to discuss long-term growth and development strategies of Binh Dinh Province as well as CFEZ Region
- to discuss role-sharing among provinces in CFEZ Region on identified strategic development agenda
- to agree on the next step

▣ DaCRISS and Its Overall Progress

- Supplemental surveys (Household Interview Survey, Commune Survey, Establishment Survey, Tourist Interview Survey, Traffic / Transport Survey)
- Field Visits
- Meetings/Interviews
- Technical Working Group Meetings
- Counterpart Team Meetings
- Situational Analysis
- Discussions on Long-term Development Strategies
- Provincial Workshop
- Preparation of Progress Report

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

▣ Framework of Workshop



STEP 1 : IDENTIFICATION OF PROBLEMS / ISSUES

Binh Dinh in the CFEZ Region

	Provinces in the Region					Binh Dinh			
	Da Nang City	T.T. Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	% to CFEZ		
Area (km ²)	1,283	5,065	10,409	5,153	6,039	27,949	22		
Population (000)	807	1,145	1,490	1,311	1,579	6,332	25		
% of Urban Population	87	35	19	15	27	31	31		
Population Growth 02-07 (%/year)	Urban	3.58	3.91	5.75	3.33	2.15	3.60	60	
	Rural	-7.07	-0.42	-0.09	0.55	0.11	-0.15	-	
	Total	1.71	0.96	0.89	0.93	0.63	0.95	66	
GRDP	VND billion	15,107	10,314	12,630	9,885	14,649	62,585	23	
	Growth (% per year)	12.3	10.7	11.4	10.7	9.9	11.5	86	
	VND thousand / capita	18,726	9,006	8,479	7,538	9,278	9,884	94	
FDI 00-07 1)	Number of Projects	536	44	66	13	31	690	4	
	US\$ mil	4,751	443	558	863	363	6,979	5	
Trade	Import (US\$ mil)	522	55	212	20	142	951	15	
	Export (US\$ mil)	470	81	176	58	327	1,112	29	
Tourism	No of Tourists (000)	Foreign	50	636	892	17	35	1,629	2
		Domestic	20	667	698	244	352	1,981	18
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Source: Most is 2007 data from Statistical Yearbooks, except the following data listed below.

- 2003-2007 data for Quang Ngai, 2002-2007 data for Binh Dinh
- 2006 data for Binh Dinh

5

Main Problems and Issues Stated in SEDP

- Underutilization of resources and potentials of the province resulting in slow economic growth
- Slow change in labor structure (high percentage in agricultural sector at 70%)
- Lack of skilled labor and highly qualified personnel
- Distance from economic hubs of Hanoi and Ho Chi Minh
- Limited resources for investment and development

6

Identified Problems by Commune Survey (CFEZ)

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"

7

Environmental Problems Perceived by Commune Survey in CFEZ (% who replied "Significant problem" or "Very severe problem")

Province	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

A8-78

8

■ Development Constraints Perceived by Commune Survey in CFEZ

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

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

■ Identified Problems by Commune Survey (Binh Dinh Province)

Regions		Quy Nhon	Sub Urban	Coastal	Inland	Binh Dinh	
Coverage of Services (%)	Primary Health Care	100	99	100	100	100	
	Education	Primary	100	100	100	100	100
		Secondary	100	100	99	86	96
	Piped Drinking Water	89	42	44	26	51	
	Electricity	99	100	99	94	97	
	Telephone	91	67	56	30	53	
Drainage	100	100	80	33	81		
Road Conditions	From Commune Center to District Center	Average Distance (km)	8	10	15	11	12
		Road Conditions 1)	0	0	0	0	0
		Seasonal Disruption (%)	5	18	64	58	47
		Vehicle Travel Time (min)	22	19	24	21	22
	From Commune Center to Provincial Center	Average Distance (km)	8	22	75	91	67
		Road Conditions 1)	0	0	0	0	0
		Seasonal Disruption (%)	5	12	64	24	36
		Vehicle Travel Time (min)	22	31	81	106	78

Source: DaCRISS Commune Survey, 2008

1) % who replied "bad"

Sub Urban : Huyen An Nhon, Huyen Tuy Phuoc
Coastal : Huyen Phu My, Huyen Phu Cat, Huyen Hoai Nhon
Inland : Huyen Vinh Thanh, Huyen Tay Son, Huyen Van Canh, Huyen An Lao, Huyen Hoai An

■ Environmental Problems Perceived by Commune Survey (Binh Dinh Province)

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

Regions		Quy Nhon	Sub Urban	Coastal	Inland	Binh Dinh
Groundwater Pollution		0	0	0	0	0
Surface Water Pollution		0	0	0	0	0
Saline Intrusion		0	0	4	0	1
Soil Pollution		0	0	0	0	0
Solid Waste		0	0	0	0	0
Air Pollution		0	0	0	0	0
Deforestation		0	0	0	26	9
Soil Erosion		0	0	0	8	3
Landslide		0	0	0	6	2
Desertification		0	0	0	0	0
Flooding	Gradual Inundation	10	0	62	32	36
	Flash Floods	0	0	0	16	5
	Storm Surges	0	0	0	0	0

Sub Urban : Huyen An Nhon, Huyen Tuy Phuoc
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Source: DaCRISS Commune Survey, 2008

■ Development Constraints Perceived by Commune Survey (Binh Dinh Province)

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

Regions		Quy Nhon	Sub Urban	Coastal	Inland	Binh Dinh
Infrastructure and Service Factors (%)	Road Access	0	4	6	51	20
	Power Supply	0	0	0	6	1
	Water Supply	14	86	100	100	87
	Drainage	0	0	0	0	0
	Education Services	0	0	15	15	4
	Health Services	0	0	15	15	4
Required Inputs to Facilitate Development (%)	Land for Agricultural Production	100	50	84	31	60
	Land for Housing	95	10	15	0	20
	Land for Enterprises	48	3	4	0	8
	Skilled Labor	71	85	94	97	91
	Knowledge and Capacity of People	5	46	46	79	53
	Access to Credit	0	15	0	36	15
Price of Physical Inputs	0	0	0	21	6	

Sub Urban : Huyen An Nhon, Huyen Tuy Phuoc
Coastal : Huyen Phu My, Huyen Phu Cat, Huyen Hoai Nhon
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A8-79

Source: DaCRISS Commune Survey, 2008

12

Summary of Problems and Constraints Identified

◀ CFEZ Region ▶

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

◀ Binh Dinh Province ▶

- Low coverage of water supply and telephone
- Seasonal disruption of roads
- Flooding and deforestation
- Lack of skilled labor and capacity / knowledge
- Lack of land for agriculture and housing
- Lack of access to credit

13

Identified Development Opportunities (CFEZ Region)

(% who replied "High potential" or "Very 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

14

Identified Development Opportunities (Binh Dinh Province)

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

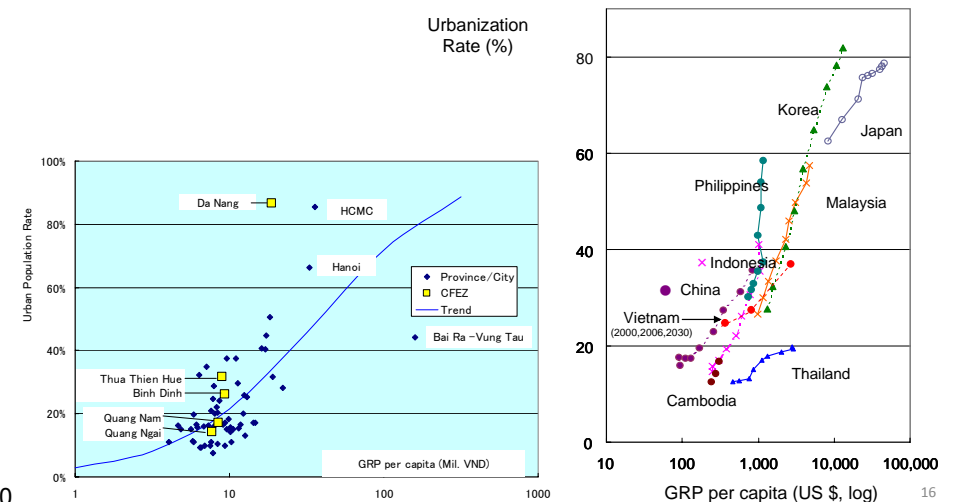
Regions		Quy Nhon	Sub Urban	Coastal	Inland	Binh Dinh
Agricultural Products	Crops	0	4	0	1	1
	Livestock	0	8	8	49	22
	Aquacultural	43	0	27	0	15
	Forestry	5	4	19	85	36
Processing Agricultural, Aquacultural, and Forestry Products		71	23	4	0	15
Mining and Other Extractive Industry		0	0	0	0	0
Household Craft Industry		76	40	8	0	20
Tourism	Mass	0	0	0	1	1
	Eco	71	10	26	46	35
Manufacturing Industries		14	0	0	0	2
Construction		81	10	0	0	13
Shops / Commercial		95	40	11	3	25
Other Services		95	40	11	3	25
Other Industrial		0	0	0	0	0

Sub Urban : Huyen An Nhon, Huyen Tuy Phuoc
 Northern : Huyen An Lao, Huyen Hoai Nhon, Huyen Hoai An
 Coastal : Huyen Phu My, Huyen Phu Cat
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Source: DaCRISS Commune Survey, 2008

External Impacts on Development of CFEZ Region

(1) Urbanization Trend in Vietnam



A8-80

16

(2) National Development Strategy

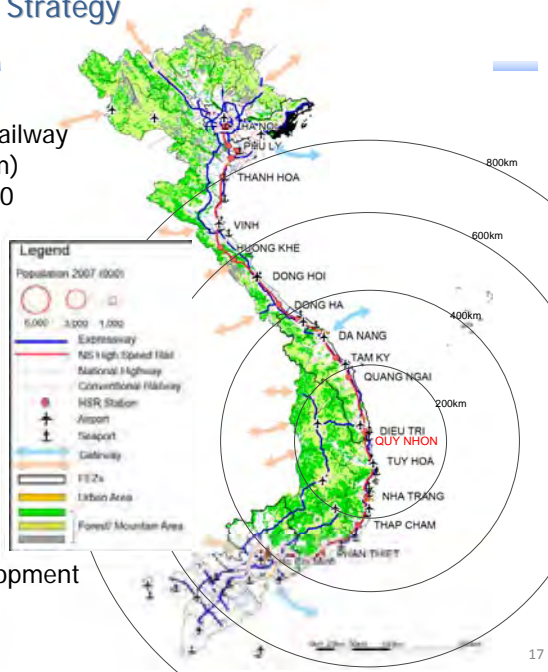
■ Transportation Development

- 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 of regional development strategies with national-level policies / projects



17

(3) EVEC (East-West Economic Corridor)

So far, Road No.9 can provide short transit time with scheduled delivery low safety risk

Potential roads for Central Vietnam

	Advantage	Disadvantage
No. 9	• Good road • Facilitated transit procedure	• Long transit time in Vietnam side • Road No.1 for Northern customers
No.8	• Possibility to short cut for Road No.1	• Mountainous road (Lao) • Not-facilitated transit procedure
No.12	• Connect to Vung Ang Port • Few mountainous road in Lao	• Poor Road condition • Not-facilitated transit procedure

Da nang to Bo-y and Binh Dinh to Dac-ta ooc (Cambodia border)
Road is narrow and underdeveloped and under planning stage

Current situation

Positive

- Growing rapidly (300 TFEU carried since 2007.11 up to 2008.11 by Lao freight forwarder (TNT also initiates to provide service)

Negative

- Still no consolidation service
- No back haulage (Vietnam To Thailand)
- Limited to Hanoi customers



18

Current situation in EVEC

	Current Situations and Problems
Cargo Transshipment	• Container must be transferred between vehicles • Rough handling for transshipment at the border
Road	• Some parts are damaged • Poor maintenance
Safety	• Lack of adequate actions or communication in case of emergency

Basic condition is being improved including procedures

Strategy for Promoting Cost Competitiveness

- Avoiding empty backhaul
- Generating Vietnam-oriented cargo

Thailand as "Detroit of ASEAN" or "export base"

- Supply areas should be expanded
- Shifting Thai facility to Vietnam

Vietnam-origin cargo can use empty backhaul, enjoying low cost

- Needs to collaborate with NFEZ-oriented cargo
- Consolidation facilities and facilitated procedure are necessary

19

■ Summary of Identified Opportunities for Development

◀ CFEZ Region ▶

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

◀ Binh Dinh Province ▶

- Developing agriculture products especially livestock and forestry
- Promoting ecotourism, household craft industry and commercial services
- Implementing matching policy / program for different areas

A8-81

20

STEP 2 : FUTURE VISION AND GOALS

Statement of SEDP

- Accelerated economic growth through creating conducive investment environment and promoting structural shift to secondary and tertiary sector
- No poverty household through strengthening human resources and creating employment
- No pollution and enhanced environment through improving urban utilities, protecting biodiversity, enhancing people's awareness and strengthening management capacity

Target Indicators

- Economic Growth Rate : 15% to 16.5 % / year
- GDP/capita : US\$ 900 (2010), US\$ 4,000 (2020)
- Urbanization Rate : 35% (2010), 52% (2020)
- Poverty Rate : 10% (2010), None (2015)
- Access to portable water : 100 % (2015)
- Domestic waste treatment : 100 % (2015)



21

Approach of SEDP (Binh Dinh Province)

- Coordination with National SEDP, CFEZ Plan, East-West Economic Corridor Plan, Central Highland Provincial Plans, and provinces in Southern Laos, North Eastern Cambodia and Thailand.
- Creating smooth and transparent environment to attract investors and promoting a shift of economic structure towards industrialization and modernization
- Harmonization of economic development and environmental protection

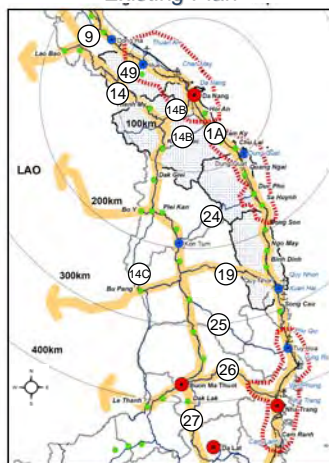
- Accelerate investment in Nhon Hoi Economic Zone and develop transshipment hub for GMS region
- Strengthen infrastructure connectivity between areas in the province
- Investments in key economic sectors : agriculture, forestry, aquacultural product processing, handicraft, construction materials, garments, mechanics, electronics, marine tourism, trade, services, etc.

22

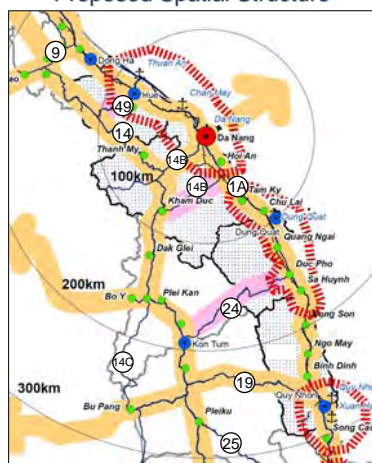
STEP 3 : ALTERNATIVE SCENARIO FOR DEVELOPMENT

Spatial Structure of the CFEZ Region

◀ Existing Plan ▶



◀ Proposed Spatial Structure ▶



- Development Clusters
 - ✓ Hue – Danang – Hoi An
 - ✓ Chu Lai – Dung Quat
 - ✓ Quy Nhon
- Development Corridors
 - ✓ NS (Coastal)
 - ✓ NS (Upland)
 - ✓ East – West (international)
 - ✓ East – West (local)
- Urban Centers

23

Rapid Assessment of Development Scenario

Sustainability Index		Scenario 1 : Baseline (Do Nothing)	Scenario 2 : Existing Plan	Scenario 3 : Enhanced Integration
Economic	<ul style="list-style-type: none"> • Global competitiveness • Complimentality in Vietnam • CFEZ integration 	1	2	3
Social	<ul style="list-style-type: none"> • Poverty free • Reduction in inequality • Access to services 	1	2 - 3	3
Environment	<ul style="list-style-type: none"> • Ecology protected • Pollution free • Disaster preparedness 	1	2	2 - 3
Governance	<ul style="list-style-type: none"> • Good management • Financial sustainability • Community involvement 	1	2	2 - 3

A8-82

Note: 3: Significant, 2: Moderate, 1: Insignificant

24

STEP 4 : DEVELOPMENT STRATEGIES AND ROLE-SHARING

- 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, ...

- ✓ 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

25

Proposed Basic Orientation for the CFEZ Region

- 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...

26

Assessment of Identified Strategies for Sustainable Development of the CFEZ Region and Binh Dinh Province

- Refer to the handout table
- Provide your assessment on each of the identified strategies with regard to :
 - (1) Relevance of the strategy to Binh Dinh Province
 - (2) Need of the strategy for inter-provincial coordination

27

Possible Role – Sharing Among Provinces in the CFEZ Region

Main Agenda	T. T. Hue	Danang City	Quang Nam	Quang Ngai	Binh Dinh
1. Industry					
2. Tourism					
3. Services					
4. Social					
5. Environmental Management					
6. Human Resource Development					
7. Gateway Function					
8. Transportation					
9. Infrastructure Development and Service Provision					
10. Urban Development					
11. Rural Development					
12. Cultural Value Enhancement					
13. Institutional Development					

A8-83 L: Leading, M: Main, S: Supplemental

28

■ Next Step

- Continue provincial workshops
- Preparation of Progress Report
- Conduct of Regional seminar in January

... thank you for your attention.



Workshop in Quang Ngai Province

People's Committee of Quang Ngai Province
11 December 2008
JICA Study Team

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10/11		Final Report

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% of Urban Population	87	35	19	15	27	31	48		
Population Growth 02-07 (%/year)	Urban	3.58	3.91	5.75	3.33	2.15	3.60	93	
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Main Problems and Issues Stated in SEDP

- Suffering flood while long and heavy rain
- Weak local economy and heavy dependency on subsidy from state budget (70%)
- Lack of scientific staff and skillful labor (only 10.7%) and technical staff
- Mountainous topography and high number of poverty household (60% in 2002 and 41% in 2003 as the new standard)
- Low productivity of agriculture sector as the main sector

6

Identified Problems by Commune Survey (CFEZ)

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"

7

Environmental Problems Perceived by Commune Survey in CFEZ (% who replied "Significant problem" or "Very severe problem")

Province	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

A8-86

8

■ Development Constraints Perceived by Commune Survey in CFEZ

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

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

■ Identified Problems by Commune Survey (Quang Ngai Province)

Regions		Quang Ngai	Sub Urban	Coastal	Inland	Quang Ngai	
Coverage of Services (%)	Primary Health Care	95	91	90	76	84	
	Education	Primary	100	100	100	82	93
		Secondary	100	99	97	73	89
	Piped Drinking Water	92	12	10	30	41	
	Electricity	100	99	87	78	90	
	Telephone	92	18	15	9	20	
Drainage	32	9	9	0	19		
Road Conditions	From Commune Center to District Center	Average Distance (km)	2	11	10	16	12
		Road Conditions 1)	0	2	10	10	6
		Seasonal Disruption (%)	100	96	66	78	87
		Vehicle Travel Time (min)	7	32	30	44	35
	From Commune Center to Provincial Center	Average Distance (km)	4	15	32	81	48
		Road Conditions 1)	0	0	0	2	1
		Seasonal Disruption (%)	100	93	72	42	79
		Vehicle Travel Time (min)	8	17	60	158	89

Source: DaCRISS Commune Survey, 2008

1) % who replied "bad"

Sub Urban : Son Tinh, Tu Nghia, Nghia Hanh

Coastal : Binh Son, Mo Duc, Duc Pho, Ly Son

Inland : Tra Bong, Tay Tra, Son Ha, Son Tay, Minh Long, Ba To

■ Environmental Problems Perceived by Commune Survey (Quang Ngai Province)

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

Regions		Quang Ngai	Sub Urban	Coastal	Inland	Quang Ngai
Groundwater Pollution		0	0	0	0	0
Surface Water Pollution		0	0	0	0	0
Saline Intrusion		0	0	0	0	0
Soil Pollution		0	0	0	0	0
Solid Waste		0	0	2	0	1
Air Pollution		0	10	2	0	4
Deforestation		0	0	0	33	9
Soil Erosion		0	0	0	26	8
Landslide		0	0	0	18	6
Desertification		0	0	0	0	0
Flooding	Gradual Inundation	10	81	34	0	35
	Flash Floods	0	4	0	59	19
	Storm Surges	0	0	0	3	1

Sub Urban : Son Tinh, Tu Nghia, Nghia Hanh

Coastal : Binh Son, Mo Duc, Duc Pho, Ly Son

Inland : Tra Bong, Tay Tra, Son Ha, Son Tay, Minh Long, Ba To

Source: DaCRISS Commune Survey, 2008

■ Development Constraints Perceived by Commune Survey (Quang Ngai Province)

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

Regions		Quang Ngai	Sub Urban	Coastal	Inland	Quang Ngai
Infrastructure and Service Factors (%)	Road Access	0	31	44	73	43
	Power Supply	0	23	39	60	36
	Water Supply	0	54	72	59	55
	Drainage	40	37	72	38	46
	Education Services	0	0	0	49	14
	Health Services	0	0	0	63	18
Required Inputs to Facilitate Development (%)	Land for Agricultural Production	20	17	20	0	11
	Land for Housing	0	0	2	0	1
	Land for Enterprises	90	13	14	0	13
	Skilled Labor	100	97	100	68	91
	Knowledge and Capacity of People	100	98	100	90	97
	Access to Credit	90	100	99	94	98
	Price of Physical Inputs	80	93	100	83	92

Sub Urban : Son Tinh, Tu Nghia, Nghia Hanh

Coastal : Binh Son, Mo Duc, Duc Pho, Ly Son

Inland : Tra Bong, Tay Tra, Son Ha, Son Tay, Minh Long, Ba To

Source: DaCRISS Commune Survey, 2008

Summary of Problems and Constraints Identified

◀ CFEZ Region ▶

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

◀ Quang Ngai Province ▶

- Low coverage of water supply and telephone, and drainage
- Seasonal disruption of roads
- Flooding and deforestation
- Lack of skilled labor and capacity / knowledge
- Lack of access to credit

13

Identified Development Opportunities (CFEZ Region)

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

Province	Danang City	Thua Thien Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ
Agricultural Products	Crops	13	16	36	10	18
	Livestock	9	7	28	13	22
	Aquacultural	13	28	9	16	15
	Forestry	11	28	43	37	36
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
	Eco	23	28	13	3	35
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

14

Identified Development Opportunities (Quang Ngai Province)

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

Regions	Quang Ngai	Sub Urban	Coastal	Inland	Quang Ngai	
Agricultural Products	Crops	0	20	6	6	10
	Livestock	0	17	2	28	13
	Aquacultural	0	12	51	0	16
	Forestry	0	6	4	98	37
Processing Agricultural, Aquacultural, and Forestry Products	80	28	54	8	28	
Mining and Other Extractive Industry	70	16	11	8	15	
Household Craft Industry	70	13	16	3	14	
Tourism	Mass	0	0	4	2	2
	Eco	0	0	1	13	3
Manufacturing Industries	70	21	7	2	13	
Construction	80	18	9	12	16	
Shops / Commercial	50	40	29	21	28	
Other Services	0	5	5	0	4	
Other Industrial	0	3	2	0	2	

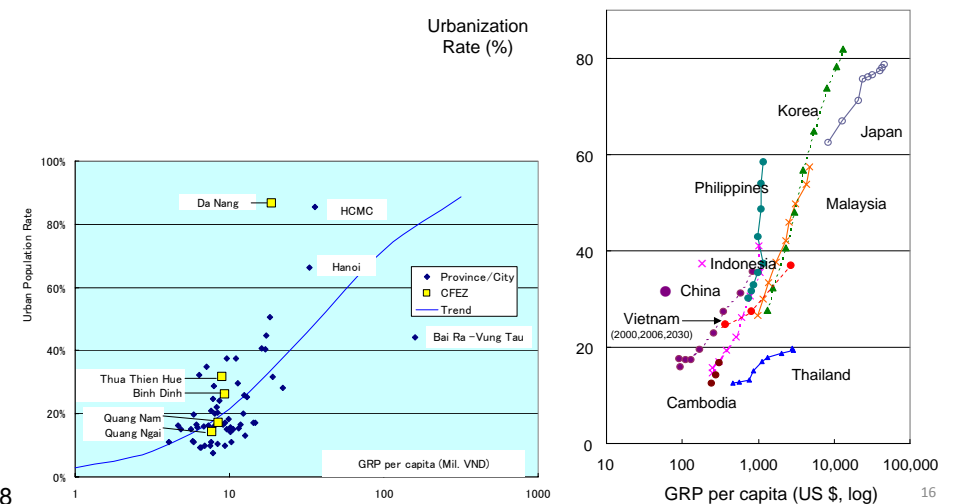
Sub Urban : Son Tinh, Tu Nghia, Nghia Hanh
 Coastal : Binh Son, Mo Duc, Duc Pho, Ly Son
 Inland : Tra Bong, Tay Tra, Son Ha, Son Tay, Minh Long, Ba To

Source: DaCRISS Commune Survey, 2008

15

External Impacts on Development of CFEZ Region

(1) Urbanization Trend in Vietnam



A8-88

16

(2) National Development Strategy

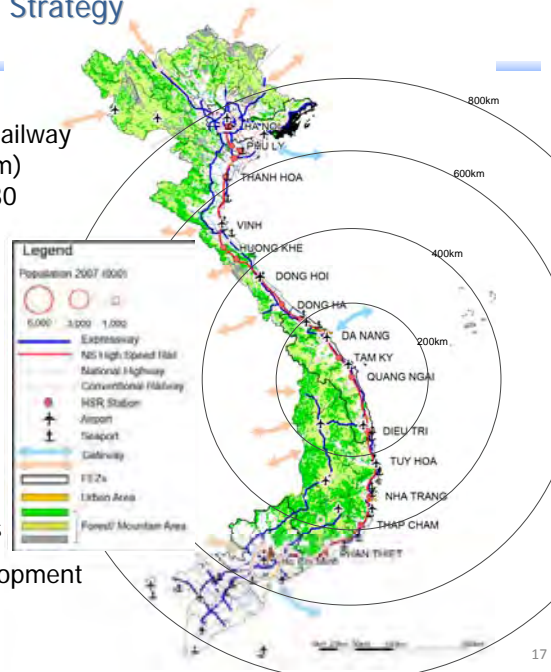
■ Transportation Development

- 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 of regional development strategies with national-level policies / projects



17

(3) EWEK (East-West Economic Corridor)

So far, Road No.9 can provide short transit time with scheduled delivery low safety risk

Potential roads for Central Vietnam

	Advantage	Disadvantage
No. 9	• Good road • Facilitated transit procedure	• Long transit time in Vietnam side • Road No.1 for Northern customers
No.8	• Possibility to short cut for Road No.1	• Mountainous road (Lao) • Not-facilitated transit procedure
No.12	• Connect to Vung Ang Port • Few mountainous road in Lao	• Poor Road condition • Not - facilitated transit procedure

Da nang to Bo-y and Binh Dinh to Dac-ta ooc (Cambodia border)
Road is narrow and underdeveloped and under planning stage



Current situation

Positive

- Growing rapidly (300 TFEU carried since 2007.11 up to 2008.11 by Lao freight forwarder (TNT also initiates to provide service)

Negative

- Still no consolidation service
- No back haulage (Vietnam To Thailand)
- Limited to Hanoi customers

18

Current situation in EWEK

	Current Situations and Problems
Cargo Transshipment	• Container must be transferred between vehicles • Rough handling for transshipment at the border
Road	• Some parts are damaged • Poor maintenance
Safety	• Lack of adequate actions or communication in case of emergency

Basic condition is being improved including procedures

Strategy for Promoting Cost Competitiveness

- Avoiding empty backhaul
- Generating Vietnam-oriented cargo

Thailand as "Detroit of ASEAN" or "export base"

- Supply areas should be expanded
- Shifting Thai facility to Vietnam

- Vietnam-origin cargo can use empty backhaul, enjoying low cost

- Needs to collaborate with NFEZ-oriented cargo
- Consolidation facilities and facilitated procedure are necessary

19

■ Summary of Identified Opportunities for Development

◀ CFEZ Region ▶

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

◀ Quang Ngai Province ▶

- National support to locate the first oil refinery in Viet Nam in Dung Quat
- Large potential of land fund for agricultural development (242,880 ha).
- Long coastal line of 129km for aquaculture, fishing and tourism.
- Potentials for industrial crops such as sugar cane, wheat, rubber and so on.
- Widespread urban system
- People's tradition for the preparedness

A8-89

20

STEP 2 : FUTURE VISION AND GOALS

● Statement of SEDP

- Accelerated economic growth through creating conducive investment environment and promoting structural shift to secondary and tertiary sector
- No poverty household through strengthening human resources and creating employment
- No pollution and enhanced environment through improving urban utilities, protecting biodiversity, enhancing people's awareness and strengthening management capacity

● Target Indicators

- Economic Growth Rate: 17-18% / year
- GDP/capita: US\$309 (2005) US\$773 (2010)
- Export turnover: 60-70 mil. USD (2010)
- Population Growth Rate: 1.1% / year
- Job creation: 28-30,000 jobs / year
- Poverty rate: 5-6% (2010)
- Access to potable water: 100% urban, 90% rural in 2010

◀ Proposed Vision and Strategies for CFEZ Region ▶

★ ECO-TECHS Region ★

- Economic Development
- Ecological balance
- Ethnological harmonization

through

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

21

Approach of SEDP (Quang Ngai Province)

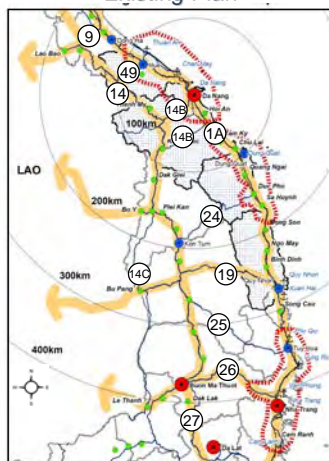
- Coordination with CFEZ plan and national development plan
- Focal points and relevant steps
 - Dung Quat Economic Zone and its clusters
 - Fishery industry (shrimp) and export processing
 - Processing industry such as sugar cane, wheat, fruit crops, rubber, cotton, etc.
- Infrastructure construction investment
 - Concentration for production facility such as irrigation works, transport and power supply.
 - Urban infrastructure for Quang Ngai and industrial zones.
 - Infrastructures for mountainous areas for poverty reduction
- Economic development for national security
 - Reduction of disparity by area
 - Social welfare for rural areas and poor households
- Environmental protection to prevent negative impact

22

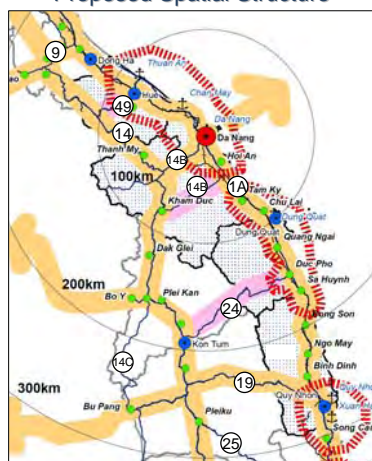
STEP 3 : ALTERNATIVE SCENARIO FOR DEVELOPMENT

■ Spatial Structure of the CFEZ Region

◀ Existing Plan ▶



◀ Proposed Spatial Structure ▶



- Development Clusters
 - ✓ Hue – Danang – Hoi An
 - ✓ Chu Lai – Dung Quat
 - ✓ Quy Nhon
- Development Corridors
 - ✓ NS (Coastal)
 - ✓ NS (Upland)
 - ✓ East – West (international)
 - ✓ East – West (local)
- Urban Centers



23

■ Rapid Assessment of Development Scenario

Sustainability Index		Scenario 1 : Baseline (Do Nothing)	Scenario 2 : Existing Plan	Scenario 3 : Enhanced Integration
Economic	<ul style="list-style-type: none"> • Global competitiveness • Complementarity in Vietnam • CFEZ integration 	1	2	3
Social	<ul style="list-style-type: none"> • Poverty free • Reduction in inequality • Access to services 	1	2 - 3	3
Environment	<ul style="list-style-type: none"> • Ecology protected • Pollution free • Disaster preparedness 	1	2	2 - 3
Governance	<ul style="list-style-type: none"> • Good management • Financial sustainability • Community involvement 	1	2	2 - 3

A8-90

Note: 3: Significant, 2: Moderate, 1: Insignificant

24

▣ STEP 4 : DEVELOPMENT STRATEGIES AND ROLE-SHARING

- 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, ...

- ✓ 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

25

● Proposed Basic Orientation for the CFEZ Region

- 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...

26

■ Assessment of Identified Strategies for Sustainable Development of the CFEZ Region and Quang Ngai Province

- Refer to the handout table
- Provide your assessment on each of the identified strategies with regard to :
 - (1) Relevance of the strategy to Quang Ngai Province
 - (2) Need of the strategy for inter-provincial coordination

27

■ Possible Role – Sharing Among Provinces in the CFEZ Region

Main Agenda	T. T. Hue	Danang City	Quang Nam	Quang Ngai	Binh Dinh
1. Industry					
2. Tourism					
3. Services					
4. Social					
5. Environmental Management					
6. Human Resource Development					
7. Gateway Function					
8. Transportation					
9. Infrastructure Development and Service Provision					
10. Urban Development					
11. Rural Development					
12. Cultural Value Enhancement					
13. Institutional Development					

A8-91 L: Leading, M: Main, S: Supplemental

28

■ Next Step

- Continue provincial workshops
- Preparation of Progress Report
- Conduct of Regional seminar in January

... thank you for your attention.



Workshop in Thua Thien Hue Province

People's Committee of Thua Thien Hue Province
12 December 2008
JICA Study Team

Purpose of the Workshop

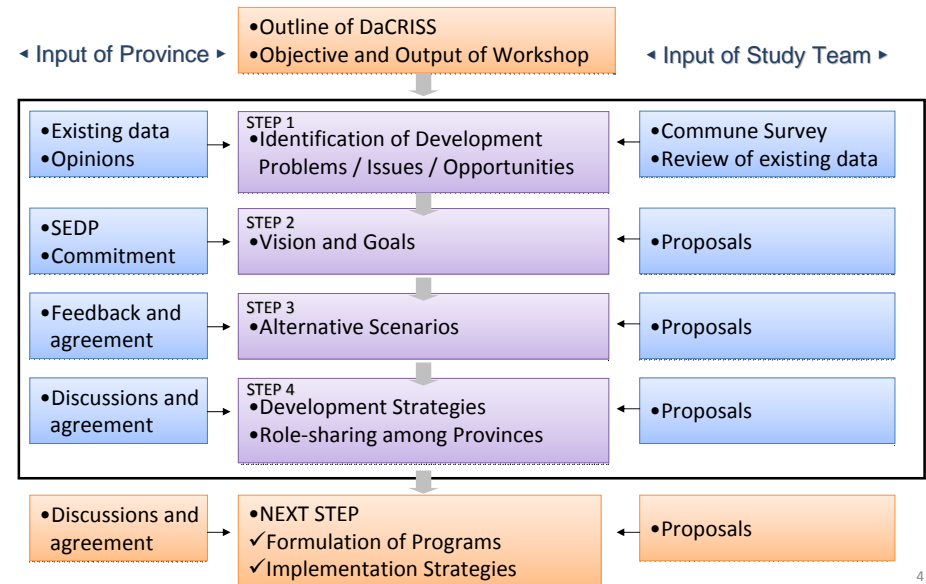
- to present a brief progress of the study
- to identify main problems and issues facing Thua Thien Hue Province
- to discuss long-term growth and development strategies of Thua Thien Hue Province as well as CFEZ Region
- to discuss role-sharing among provinces in CFEZ Region on identified strategic development agenda
- to agree on the next step

DaCRISS and Its Overall Progress

- Supplemental surveys (Household Interview Survey, Commune Survey, Establishment Survey, Tourist Interview Survey, Traffic / Transport Survey)
- Field Visits
- Meetings/Interviews
- Technical Working Group Meetings
- Counterpart Team Meetings
- Situational Analysis
- Discussions on Long-term Development Strategies
- Provincial Workshop
- Preparation of Progress Report

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

Framework of Workshop



STEP 1 : IDENTIFICATION OF PROBLEMS / ISSUES

Thua Thien Hue in the CFEZ Region

	Provinces in the Region					Thua Thien Hue			
	Da Nang City	T.T. Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	% to CFEZ		
Area (km ²)	1,283	5,065	10,409	5,153	6,039	27,949	18		
Population (000)	807	1,145	1,490	1,311	1,579	6,332	18		
% of Urban Population	87	35	19	15	27	31	113		
Population Growth 02-07 (%/year)	Urban	3.58	3.91	5.75	3.33	2.15	3.60	109	
	Rural	-7.07	-0.42	-0.09	0.55	0.11	-0.15	280	
	Total	1.71	0.96	0.89	0.93	0.63	0.95	101	
GRDP	VND billion	15,107	10,314	12,630	9,885	14,649	62,585	16	
	Growth (% per year)	12.3	10.7	11.4	10.7	9.9	11.5	93	
	VND thousand / capita	18,726	9,006	8,479	7,538	9,278	9,884	91	
FDI 00-07 1)	Number of Projects	536	44	66	13	31	690	6	
	US\$ mil	4,751	443	558	863	363	6,979	6	
Trade	Import (US\$ mil)	522	55	212	20	142	951	6	
	Export (US\$ mil)	470	81	176	58	327	1,112	7	
Tourism	No of Tourists (000)	Foreign	50	636	892	17	35	1,629	39
		Domestic	20	667	698	244	352	1,981	34
	Receipt (US\$ mil) 2)	32	39	28	4	4	108	36	

Source: Most is 2007 data from Statistical Yearbooks, except the following data listed below.

- 2003-2007 data for Quang Ngai, 2002-2007 data for Binh Dinh
- 2006 data for Binh Dinh

5

Main Problems and Issues Stated in SEDP

- Low competitiveness of provincial products
- Low GRDP per capita (VND 517,000 /month) - 81.3 % of national average.
- Rapid natural resources degradation caused by intensive agricultural development
- Insufficient financial savings
- Low attraction for foreign investors
- Insufficient level of rural infrastructure
- Lack of long-term vision, integration between plans, especially between the general plan and the detail plans
- Unclear division and insufficient reform of state administration

6

Identified Problems by Commune Survey (CFEZ)

Province		Danang City	TT 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
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		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"

7

Environmental Problems Perceived by Commune Survey in CFEZ (% who replied "Significant problem" or "Very severe problem")

Province		Danang City	TT Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	
Environmental Problems	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

A8-94

Source: DaCRISS Commune Survey, 2008

8

Development Constraints Perceived by Commune Survey in CFEZ

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

Province		Danang City	TT 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

Identified Problems by Commune Survey (TT Hue Province)

Regions		Hue City	Coastal	Inland	TT Hue	
Coverage of Services (%)	Primary Health Care	100	99	91	94	
	Education	Primary	100	99	87	92
		Secondary	95	92	76	84
	Piped Drinking Water	67	49	62	62	
	Electricity	97	96	77	85	
	Telephone	69	48	41	48	
Drainage	59	37	60	51		
Road Conditions	From Commune Center to District Center	Average Distance (km)	5	15	16	15
		Road Conditions 1)	0	0	0	0
		Seasonal Disruption (%)	4	58	26	36
		Vehicle Travel Time (min)	12	29	28	27
	From Commune Center to Provincial Center	Average Distance (km)	5	33	51	40
		Road Conditions 1)	0	0	0	0
		Seasonal Disruption (%)	4	63	30	39
		Vehicle Travel Time (min)	12	54	70	58

Source: DaCRISS Commune Survey, 2008

Coastal : Quang Dien, Phu Vang, Phu Loc

1) % who replied "bad"

Inland : Phong Dien, Huong Thuy, Huong Tra, A Luoi, Nam Dong

Environmental Problems Perceived by Commune Survey (TT Hue Province)

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

Regions		Hue City	Coastal	Inland	TT Hue
Groundwater Pollution		7	8	7	7
Surface Water Pollution		15	6	6	8
Saline Intrusion		0	7	4	4
Soil Pollution		7	2	1	3
Solid Waste		7	2	0	2
Air Pollution		0	7	14	9
Deforestation		4	9	33	20
Soil Erosion		0	3	44	22
Landslide		0	30	52	34
Desertification		0	3	0	1
Flooding	Gradual Inundation	52	34	39	34
	Flash Floods	4	5	49	25
	Storm Surges	0	5	8	5

Source: DaCRISS Commune Survey, 2008

Coastal : Quang Dien, Phu Vang, Phu Loc

Inland : Phong Dien, Huong Thuy, Huong Tra, A Luoi, Nam Dong

Development Constraints Perceived by Commune Survey (TT Hue Province)

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

Regions		Hue City	Coastal	Inland	TT Hue
Infrastructure and Service Factors (%)	Road Access	4	19	38	24
	Power Supply	4	13	12	13
	Water Supply	11	58	78	60
	Drainage	26	27	13	19
	Education Services	7	19	16	16
	Health Services	4	19	15	16
Required Inputs to Facilitate Development (%)	Land for Agricultural Production	4	17	5	8
	Land for Housing	4	2	4	3
	Land for Enterprises	11	5	6	7
	Skilled Labor	33	68	77	68
	Knowledge and Capacity of People	33	74	77	70
	Access to Credit	19	50	30	39
	Price of Physical Inputs	0	14	30	20

A8-95

Source: DaCRISS Commune Survey, 2008

Coastal : Quang Dien, Phu Vang, Phu Loc

Inland : Phong Dien, Huong Thuy, Huong Tra, A Luoi, Nam Dong

Summary of Problems and Constraints Identified

◀ CFEZ Region ▶

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

▶ Thua Thien Hue Province ▶

- Low coverage of water supply telephone, and drainage
- Seasonal disruption of roads
- Deforestation, soil erosion, landslide, flooding
- Lack of skilled labor and capacity / knowledge
- Lack of access to credit

13

Identified Development Opportunities (CFEZ Region)

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

Province		Danang City	TT 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

14

Identified Development Opportunities (Thua Thien Hue Province)

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

Regions		Hue City	Coastal	Inland	TT Hue
Agricultural Products	Crops	7	30	30	16
	Livestock	0	8	8	7
	Aquacultural	7	10	10	28
	Forestry	7	43	43	28
Processing Agricultural, Aquacultural, and Forestry Products		0	12	12	17
Mining and Other Extractive Industry		4	16	16	13
Household Craft Industry		7	7	7	11
Tourism	Mass	22	7	7	16
	Eco	33	26	26	28
Manufacturing Industries		0	1	1	3
Construction		4	2	2	3
Shops / Commercial		41	35	35	34
Other Services		30	26	26	26
Other Industrial		0	0	0	1

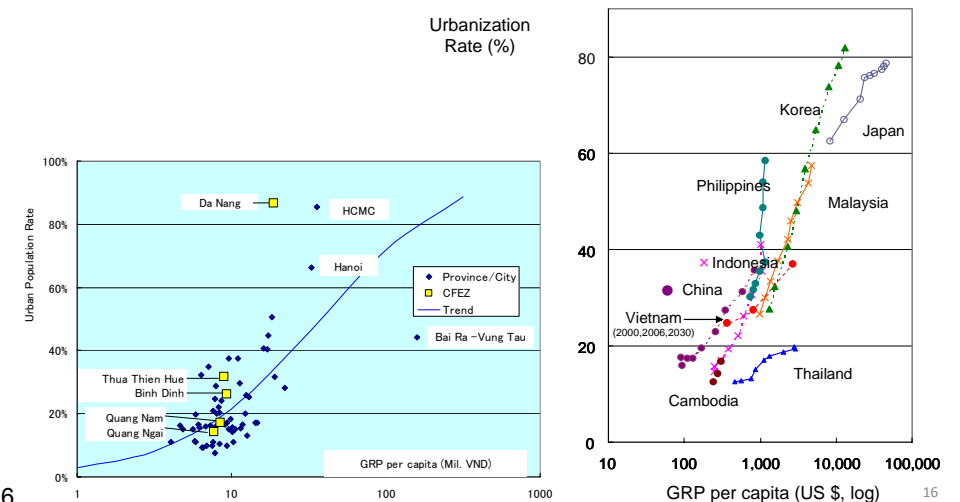
Source: DaCRISS Commune Survey, 2008

Coastal : Quang Dien, Phu Vang, Phu Loc
Inland : Phong Dien, Huong Thuy, Huong Tra, A Luoi, Nam Dong

15

External Impacts on Development of CFEZ Region

(1) Urbanization Trend in Vietnam



A8-96

16

(2) National Development Strategy

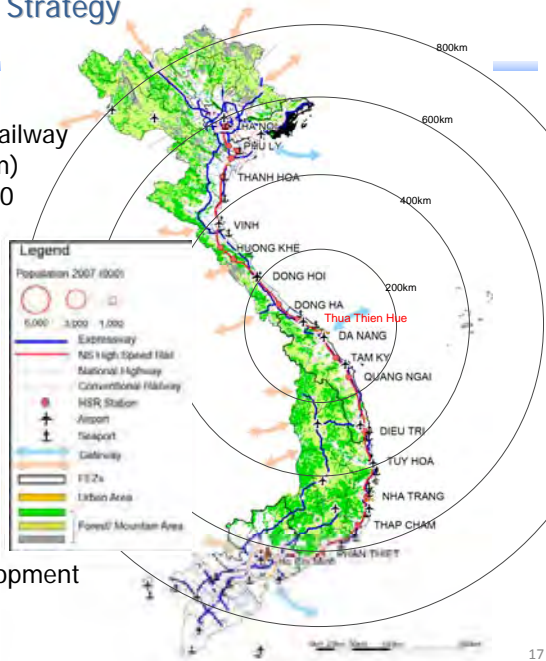
■ Transportation Development

- 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 of regional development strategies with national-level policies / projects



17

(3) EWEK (East-West Economic Corridor)

So far, Road No.9 can provide short transit time with scheduled delivery low safety risk

Potential roads for Central Vietnam

	Advantage	Disadvantage
No. 9	• Good road • Facilitated transit procedure	• Long transit time in Vietnam side • Road No.1 for Northern customers
No.8	• Possibility to short cut for Road No.1	• Mountainous road (Lao) • Not-facilitated transit procedure
No.12	• Connect to Vung Ang Port • Few mountainous road in Lao	• Poor Road condition • Not-facilitated transit procedure

Da nang to Bo-y and Binh Dinh to Dac-ta ooc (Cambodia border)
Road is narrow and underdeveloped and under planning stage

Current situation

Positive

- Growing rapidly (300 TFEU carried since 2007.11 up to 2008.11 by Lao freight forwarder (TNT also initiates to provide service)

Negative

- Still no consolidation service
- No back haulage (Vietnam To Thailand)
- Limited to Hanoi customers



18

Current situation in EWEK

	Current Situations and Problems
Cargo Transshipment	• Container must be transferred between vehicles • Rough handling for transshipment at the border
Road	• Some parts are damaged • Poor maintenance
Safety	• Lack of adequate actions or communication in case of emergency

Basic condition is being improved including procedures

Strategy for Promoting Cost Competitiveness

- Avoiding empty backhaul
- Generating Vietnam-oriented cargo

Thailand as "Detroit of ASEAN" or "export base"

- Supply areas should be expanded
- Shifting Thai facility to Vietnam

- Vietnam-origin cargo can use empty backhaul, enjoying low cost

- Needs to collaborate with NFEZ-oriented cargo
- Consolidation facilities and facilitated procedure are necessary

19

■ Summary of Identified Opportunities for Development

◀ CFEZ Region ▶

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

◀ Thua Thien Hue Province ▶

- Strategic location on North-South traffic axle and West-east economic corridor
- Ancient Capital of Hue: Cultural heritage known in the world
- Good access at Thuan An deep sea port
- Richness in mineral, forest, and marine resources.
- High quality of labor forces

A8-97

20

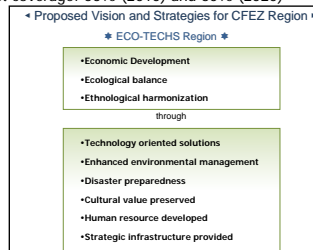
STEP 2 : FUTURE VISION AND GOALS

Statement of SEDP

- Accelerated economic growth through creating conducive investment environment and promoting structural shift to secondary and tertiary sector
- No poverty household through strengthening human resources and creating employment
- No pollution and enhanced environment through improving urban utilities, protecting biodiversity, enhancing people's awareness and strengthening management capacity

Target Indicators

- Economic Growth Rate: 15-16% (2006 – 2010), 12-13%+ (Later)
- GDP/capita: US\$ 1000+ (2010) US\$ 4000 (2020) at current price
- Export turnover: US\$ 300 mil. (2010) and US\$ 1 billion (2020)
- Revenue: 13-14% of GDP (2010) and 14% (2020)
- Population Growth Rate: 1.2% / yr (2006-10) 1.1-1.2% / yr
- Job creation: 14,000 jobs / year (2006-2010), 16-17,000 jobs / yr (2011-2020)
- Access to gridline: 98% (2010)
- Access to clean water: 95% (2010)
- Forest coverage: 55% (2010) and 60% (2020)



21

Approach of SEDP (Thua Thien Hue Province)

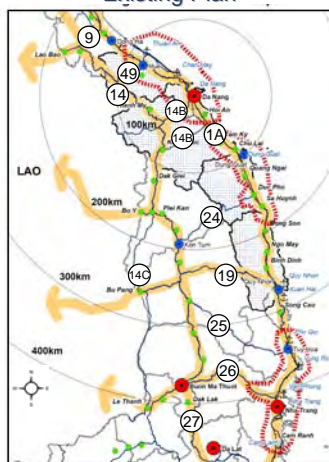
- Accomplishment and modernization of infrastructure and major projects.
- Sustainable development for environment in planning and management.
- Development of Hue City as a growth core for tourism, service, and culture.
- Development of Chan May-Lang Co economic zone as an economic and urban center of the south
- Development of Thua Thien Hue Province as one of sea-economic center
- Integration of rural economy as a belt
- Completion of territorial and spatial plan to connect urban centers with rural areas
- Coordination of development with Thua Thien Hue with other provinces and cities to boost development of the entire CFEZ, Central Region and Vietnam as a whole

22

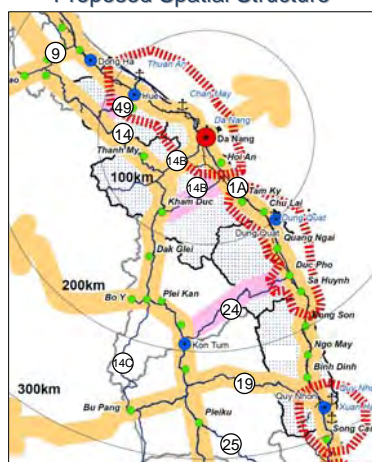
STEP 3 : ALTERNATIVE SCENARIO FOR DEVELOPMENT

Spatial Structure of the CFEZ Region

Existing Plan



Proposed Spatial Structure



- Development Clusters
 - Hue – Danang – Hoi An
 - Chu Lai – Dung Quat
 - Quy Nhon
- Development Corridors
 - NS (Coastal)
 - NS (Upland)
 - East – West (international)
 - East – West (local)
- Urban Centers



23

Rapid Assessment of Development Scenario

Sustainability Index		Scenario 1 : Baseline (Do Nothing)	Scenario 2 : Existing Plan	Scenario 3 : Enhanced Integration
Economic	<ul style="list-style-type: none"> Global competitiveness Complimentality in Vietnam CFEZ integration 	1	2	3
Social	<ul style="list-style-type: none"> Poverty free Reduction in inequality Access to services 	1	2 - 3	3
Environment	<ul style="list-style-type: none"> Ecology protected Pollution free Disaster preparedness 	1	2	2 - 3
Governance	<ul style="list-style-type: none"> Good management Financial sustainability Community involvement 	1	2	2 - 3

A8-98

Note: 3: Significant, 2: Moderate, 1: Insignificant

24

■ STEP 4 : DEVELOPMENT STRATEGIES AND ROLE-SHARING

- 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, ...

- ✓ 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

25

● Proposed Basic Orientation for the CFEZ Region

- 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...

26

■ Assessment of Identified Strategies for Sustainable Development of the CFEZ Region and Thua Thien Hue Province

- Refer to the handout table
- Provide your assessment on each of the identified strategies with regard to :
 - (1) Relevance of the strategy to Thua Thien Hue Province
 - (2) Need of the strategy for inter-provincial coordination

27

■ Possible Role – Sharing Among Provinces in the CFEZ Region

Main Agenda	T. T. Hue	Danang City	Quang Nam	Quang Ngai	Binh Dinh
1. Industry					
2. Tourism					
3. Services					
4. Social					
5. Environmental Management					
6. Human Resource Development					
7. Gateway Function					
8. Transportation					
9. Infrastructure Development and Service Provision					
10. Urban Development					
11. Rural Development					
12. Cultural Value Enhancement					
13. Institutional Development					

A8-99 L: Leading, M: Main, S: Supplemental

28

■ Next Step

- Continue provincial workshops
- Preparation of Progress Report
- Conduct of Regional seminar in January

... thank you for your attention.



Workshop in Quang Nam Province

Department of Planning and Investment, Quang Nam Province
17 December 2008
JICA Study Team

Purpose of the Workshop

- to present a brief progress of the study
- to identify main problems and issues facing Quang Nam Province
- to discuss long-term growth and development strategies of Quang Nam Province as well as CFEZ Region
- to discuss role-sharing among provinces in CFEZ Region on identified strategic development agenda
- to agree on the next step

DaCRISS and Its Overall Progress

- Supplemental surveys (Household Interview Survey, Commune Survey, Establishment Survey, Tourist Interview Survey, Traffic / Transport Survey)
- Field Visits
- Meetings/Interviews
- Technical Working Group Meetings
- Counterpart Team Meetings
- Situational Analysis
- Discussions on Long-term Development Strategies
- Provincial Workshop
- Preparation of Progress Report

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

Framework of Workshop



STEP 1 : IDENTIFICATION OF PROBLEMS / ISSUES

Quang Nam in the CFEZ Region

	Provinces in the Region					Quang Nam			
	Da Nang City	T.T. Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	% to CFEZ		
Area (km ²)	1,283	5,065	10,409	5,153	6,039	27,949	37		
Population (000)	807	1,145	1,490	1,311	1,579	6,332	24		
% of Urban Population	87	35	19	15	27	31	61		
Population Growth 02-07 (%/year)	Urban	3.58	3.91	5.75	3.33	2.15	3.60	160	
	Rural	-7.07	-0.42	-0.09	0.55	0.11	-0.15	60	
	Total	1.71	0.96	0.89	0.93	0.63	0.95	94	
GRDP	VND billion	15,107	10,314	12,630	9,885	14,649	62,585	20	
	Growth (% per year)	12.3	10.7	11.4	10.7	9.9	11.5	99	
	VND thousand / capita	18,726	9,006	8,479	7,538	9,278	9,884	86	
FDI 00-07 1)	Number of Projects	536	44	66	13	31	690	10	
	US\$ mil	4,751	443	558	863	363	6,979	8	
Trade	Import (US\$ mil)	522	55	212	20	142	951	22	
	Export (US\$ mil)	470	81	176	58	327	1,112	16	
Tourism	No of Tourists (000)	Foreign	50	636	892	17	35	1,629	55
		Domestic	20	667	698	244	352	1,981	35
	Receipt (US\$ mil) 2)	32	39	28	4	4	108	26	

Source: Most is 2007 data from Statistical Yearbooks, except the following data listed below.

- 2003-2007 data for Quang Ngai, 2002-2007 data for Binh Dinh
- 2006 data for Binh Dinh

5

Main Problems and Issues Stated in SEDP

- Difficulties of transport and movements of goods and commodities internally and externally due to mountainous topography.
- Natural disasters
- Weak and inconsistent infrastructure
- Low public intellectual standard
- Insufficient institutions and policy.

6

Identified Problems by Commune Survey (CFEZ)

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"

7

Environmental Problems Perceived by Commune Survey in CFEZ (% who replied "Significant problem" or "Very severe problem")

Province	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

A8-102

8

Development Constraints Perceived by Commune Survey in CFEZ

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

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

Identified Problems by Commune Survey (Quang Nam Province)

Regions		Tam Ky	Hoi An	Coastal	Northern Inland	Southern Inland	Quang Nam	
Coverage of Services (%)	Primary Health Care	100	99	100	94	94	97	
	Education	Primary	100	96	99	93	90	95
		Secondary	100	96	98	86	86	91
	Piped Drinking Water	83	88	42	23	-	65	
	Electricity	91	95	95	90	77	89	
	Telephone	73	74	32	25	25	32	
Drainage	100	99	100	94	94	46		
Road Conditions	From Commune Center to District Center	Average Distance (km)	4	6	11	23	17	17
		Road Conditions 1)	0	0	0	15	20	10
		Seasonal Disruption (%)	0	0	14	44	54	33
	From Commune Center to Provincial Center	Vehicle Travel Time (min)	8	18	17	43	36	33
		Average Distance (km)	4	74	36	101	76	75
		Road Conditions 1)	0	0	0	13	18	9
Seasonal Disruption (%)	0	0	12	26	45	25		
Vehicle Travel Time (min)	8	91	44	161	121	116		

Source: DaCRISS Commune Survey, 2008

1) % who replied "bad"

Coastal : Dien Ban, Thang Binh, Nui Thanh
Northern Inland : Tay Giang, Dong Giang, Dai Loc, Duy Xuyen, Que Son, Nam Giang, Nam Son
Southern Inland : Phuoc Son, Hiep Duc, Tien Phuoc, Bac Tra My, Nam Tra My, Phu Ninh

Environmental Problems Perceived by Commune Survey (Quang Nam Province)

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

Regions		Tam Ky	Hoi An	Coastal	Northern Inland	Southern Inland	Quang Nam
Groundwater Pollution		0	0	0	0	0	0
Surface Water Pollution		0	0	0	0	0	0
Saline Intrusion		0	0	0	0	0	0
Soil Pollution		0	0	0	0	0	0
Solid Waste		0	0	0	0	0	0
Air Pollution		0	0	0	0	0	0
Deforestation		0	0	0	11	7	5
Soil Erosion		0	0	2	3	9	4
Landslide		0	0	0	5	8	3
Desertification		0	0	0	0	0	0
Flooding	Gradual Inundation	0	0	7	0	0	2
	Flash Floods	0	0	0	19	23	12
	Storm Surges	0	0	0	0	0	0

Coastal : Dien Ban, Thang Binh, Nui Thanh
Northern Inland : Tay Giang, Dong Giang, Dai Loc, Duy Xuyen, Que Son, Nam Giang, Nam Son
Southern Inland : Phuoc Son, Hiep Duc, Tien Phuoc, Bac Tra My, Nam Tra My, Phu Ninh

Source: DaCRISS Commune Survey, 2008

Development Constraints Perceived by Commune Survey (Quang Nam Province)

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

Regions		Tam Ky	Hoi An	Coastal	Northern Inland	Southern Inland	Quang Nam
Infrastructure and Service Factors (%)	Road Access	0	0	10	65	94	50
	Power Supply	0	8	10	60	84	45
	Water Supply	0	8	13	4	16	10
	Drainage	0	0	4	3	6	4
	Education Services	8	8	12	61	83	46
	Health Services	0	8	12	61	90	48
Required Inputs to Facilitate Development (%)	Land for Agricultural Production	0	8	8	12	16	11
	Land for Housing	0	46	6	17	23	15
	Land for Enterprises	0	46	6	25	47	25
	Skilled Labor	85	8	50	68	88	66
	Knowledge and Capacity of People	100	8	57	71	84	67
	Access to Credit	100	8	41	67	65	55
	Price of Physical Inputs	100	15	31	44	59	44

Coastal : Dien Ban, Thang Binh, Nui Thanh
Northern Inland : Tay Giang, Dong Giang, Dai Loc, Duy Xuyen, Que Son, Nam Giang, Nam Son
Southern Inland : Phuoc Son, Hiep Duc, Tien Phuoc, Bac Tra My, Nam Tra My, Phu Ninh

Source: DaCRISS Commune Survey, 2008

Summary of Problems and Constraints Identified

◀ CFEZ Region ▶

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

◀ Quang Nam Province ▶

- Low coverage of telephone and drainage
- Seasonal disruption of roads
- Long distance from commune to provincial center
- Deforestation, Flooding
- Lack of road access, power supply, education and health services
- Lack of skilled labor and capacity / knowledge
- Lack of land for agriculture and housing
- Lack of access to credit
- High prices of physical input

13

Identified Development Opportunities (CFEZ Region)

(% who replied "High potential" or "Very 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

14

Identified Development Opportunities (Quang Nam Province)

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

Regions		Tam Ky	Hoi An	Coastal	Northern Inland	Southern Inland	Quang Nam
Agricultural Products	Crops	0	0	32	51	37	36
	Livestock	0	8	34	42	18	28
	Aquacultural	0	8	24	6	0	9
	Forestry	0	0	10	58	76	43
Processing Agricultural, Aquacultural, and Forestry Products		0	8	9	6	8	8
Mining and Other Extractive Industry		0	0	7	2	5	4
Household Craft Industry		0	69	24	10	2	15
Tourism	Mass	0	38	10	1	2	6
	Eco	0	77	23	6	5	13
Manufacturing Industries		0	8	14	4	0	5
Construction		0	0	8	1	0	3
Shops / Commercial		0	69	12	11	10	13
Other Services		23	46	10	3	2	8
Other Industrial		0	0	8	0	1	3

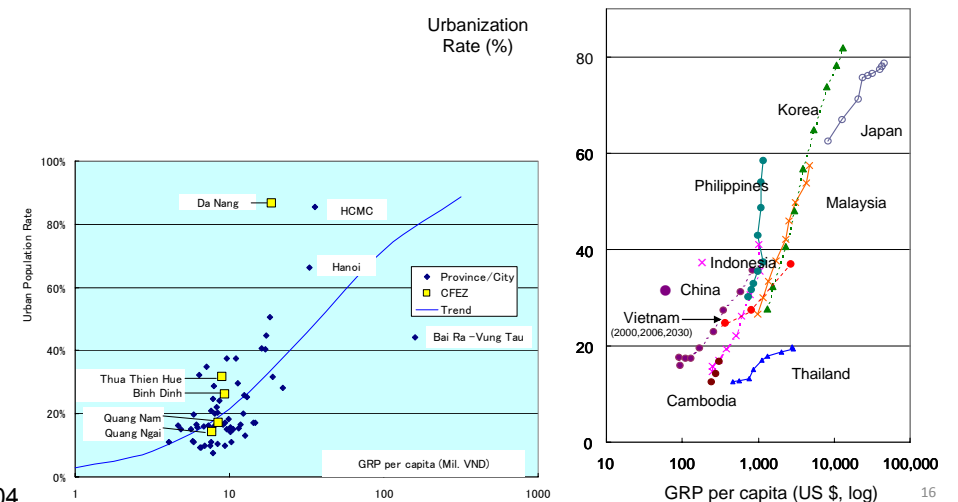
Coastal : Dien Ban, Thang Binh, Nui Thanh
 Northern Inland : Tay Giang, Dong Giang, Dai Loc, Duy Xuyen, Que Son, Nam Giang, Nam Son
 Southern Inland : Phuoc Son, Hiep Duc, Tien Phuoc, Bac Tra My, Nam Tra My, Phu Ninh

Source: DaCRISS Commune Survey, 2008

A8-104

External Impacts on Development of CFZ Region

(1) Urbanization Trend in Vietnam



16

(2) National Development Strategy

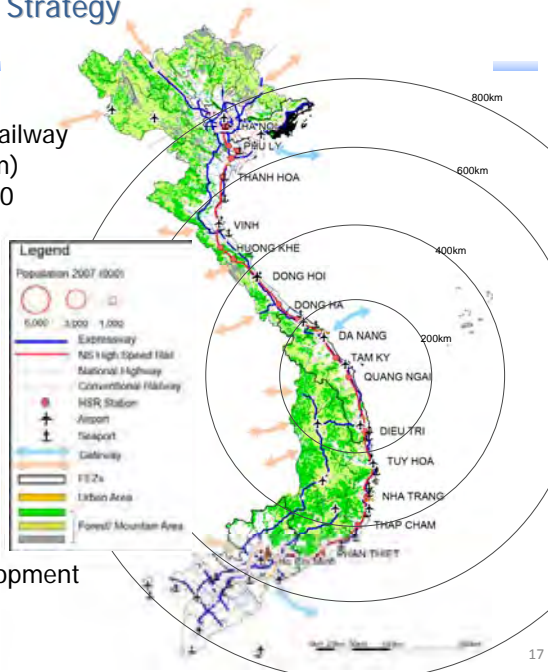
■ Transportation Development

- 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 of regional development strategies with national-level policies / projects



17

(3) EWEK (East-West Economic Corridor)

So far, Road No.9 can provide short transit time with scheduled delivery low safety risk

Potential roads for Central Vietnam

	Advantage	Disadvantage
No. 9	• Good road • Facilitated transit procedure	• Long transit time in Vietnam side • Road No.1 for Northern customers
No.8	• Possibility to short cut for Road No.1	• Mountainous road (Lao) • Not-facilitated transit procedure
No.12	• Connect to Vung Ang Port • Few mountainous road in Lao	• Poor Road condition • Not-facilitated transit procedure

Da nang to Bo-y and Binh Dinh to Dac-ta ooc (Cambodia border)
Road is narrow and underdeveloped and under planning stage

Current situation

Positive

- Growing rapidly (300 TFEU carried since 2007.11 up to 2008.11 by Lao freight forwarder (TNT also initiates to provide service)

Negative

- Still no consolidation service
- No back haulage (Vietnam To Thailand)
- Limited to Hanoi customers



18

Current situation in EWEK

	Current Situations and Problems
Cargo Transshipment	• Container must be transferred between vehicles • Rough handling for transshipment at the border
Road	• Some parts are damaged • Poor maintenance
Safety	• Lack of adequate actions or communication in case of emergency

Basic condition is being improved including procedures

Strategy for Promoting Cost Competitiveness

- Avoiding empty backhaul
- Generating Vietnam-oriented cargo

Thailand as "Detroit of ASEAN" or "export base"

- Supply areas should be expanded
- Shifting Thai facility to Vietnam

- Vietnam-origin cargo can use empty backhaul, enjoying low cost

- Needs to collaborate with NFEZ-oriented cargo
- Consolidation facilities and facilitated procedure are necessary

19

■ Summary of Identified Opportunities for Development

◀ CFEZ Region ▶

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

◀ Quang Nam Province ▶

- Favorable location in the CFEZ.
- Ky Ha Port and Chu Lai Airport
- Gateway to the sea and South of Lao PDR
- Two World Heritages: Hoi An and My Son
- Good road
- Beach of 125km
- Cultural diversity
- Clean environment, etc.

A8-105

20

STEP 2 : FUTURE VISION AND GOALS

● Statement of SEDP

- Promote and effectively utilize internal factors and external resources for realization of objective of fast-paced, sustainable economic growth.
- Restructuring the provincial economy in a way to promote provincial advantages and regional and general development orientations.
- Developing in a way that balance and harmonize economic development factors taking into account social advance and equality, protecting and recovering natural environment, improving quality of life. Socio-economic plan should be attached with national defense and security and mitigation of disasters

● Target Indicators

- Economic Growth Rate: 13-13.5% / year (2010-2015)
- GDP/capita: US\$684 (2010) US\$1,480 (2015)
- Export turnover: 60-70 mil. USD (2010)
- Population Natural Growth Rate: 1.15% / year (2011-2015)
- Job creation
- Universalization of secondary education (2007)
- Poverty rate: 2.5-4% (2015)



21

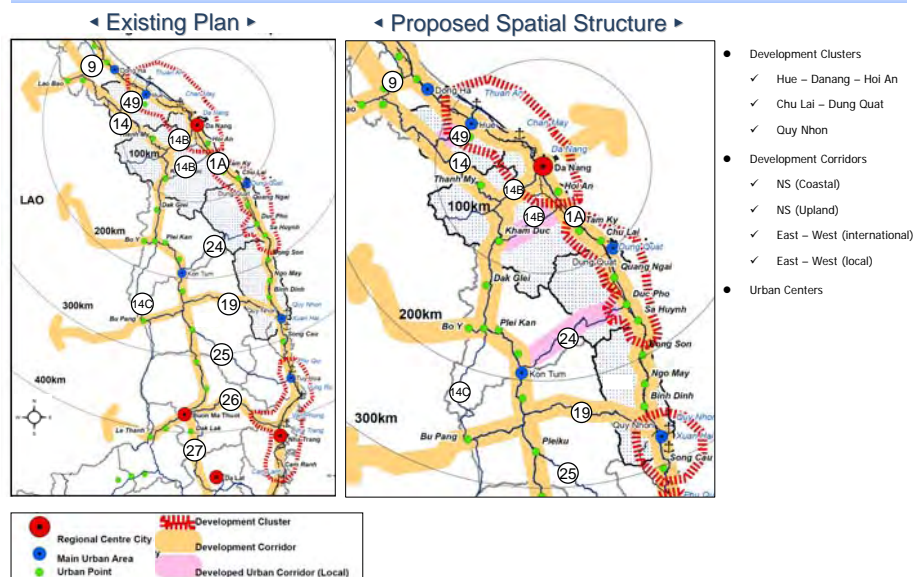
Approach of SEDP (Quang Nam Province)

- Mobilization of internal resources and stronger impacts of external resources
- Concentration on development of key infrastructure facilities
- Generation of smooth and open investment atmosphere
- Inclusion of market factors, namely funds, human resources and technological achievements.
- Utilization of impact of foreign-invested projects in Chu Lai, Ky Ha, Dien Ngoc – Dien Nam IP, tourism development in Hoi An and Dien Ban
- Promotion of Chu Lai Economic Zone

22

STEP 3 : ALTERNATIVE SCENARIO FOR DEVELOPMENT

■ Spatial Structure of the CFEZ Region



23

■ Rapid Assessment of Development Scenario

Sustainability Index		Scenario 1 : Baseline (Do Nothing)	Scenario 2 : Existing Plan	Scenario 3 : Enhanced Integration
Economic	<ul style="list-style-type: none"> Global competitiveness Complimentality in Vietnam CFEZ integration 	1	2	3
Social	<ul style="list-style-type: none"> Poverty free Reduction in inequality Access to services 	1	2 - 3	3
Environment	<ul style="list-style-type: none"> Ecology protected Pollution free Disaster preparedness 	1	2	2 - 3
Governance	<ul style="list-style-type: none"> Good management Financial sustainability Community involvement 	1	2	2 - 3

A8-106

Note: 3: Significant, 2: Moderate, 1: Insignificant

24

▣ STEP 4 : DEVELOPMENT STRATEGIES AND ROLE-SHARING

- 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, ...

- ✓ 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

25

● Proposed Basic Orientation for the CFEZ Region

- 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
 - Strengthen intra-regional connectivity through network development
- ④ **Strengthen inter-provincial coordination** for strategic sector such as tourism, environment, transport, coastal management...
 - 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...

26

■ Assessment of Identified Strategies for Sustainable Development of the CFEZ Region and Quang Nam Province

- Refer to the handout table
- Provide your assessment on each of the identified strategies with regard to :
 - (1) Relevance of the strategy to Quang Nam Province
 - (2) Need of the strategy for inter-provincial coordination

27

■ Possible Role – Sharing Among Provinces in the CFEZ Region

Main Agenda	T. T. Hue	Danang City	Quang Nam	Quang Ngai	Binh Dinh
1. Industry					
2. Tourism					
3. Services					
4. Social					
5. Environmental Management					
6. Human Resource Development					
7. Gateway Function					
8. Transportation					
9. Infrastructure Development and Service Provision					
10. Urban Development					
11. Rural Development					
12. Cultural Value Enhancement					
13. Institutional Development					

28

■ Next Step

- Continue provincial workshops
- Preparation of Progress Report
- Conduct of Regional seminar in January

... thank you for your attention.



Seminar on Integrated Development Strategy for Danang City and Its Neighboring Area (DaCRISS)

April 20th 2009
JICA Study Team

□ Purpose of the Seminar

- to present a brief progress of the Study
- to identify main problems and issues facing the CFEZ
- to discuss vision and long-term growth and development strategies of Danang City as well as the CFEZ
- to discuss role-sharing among provinces in the CFEZ on identified strategic development agenda
- to explain the next steps

2

□ DaCRISS and Its Overall Progress

- Supplemental surveys (Household Interview Survey, Commune Survey, Establishment Survey, Tourist Interview Survey, Traffic / Transport Survey)
- Field Visits
- Meetings/Interviews
- Technical Working Group Meetings
- Counterpart Team Meetings
- Situational Analysis
- Discussions on Long-term Development Strategies
- Provincial Workshops
- Preparation of Progress Report

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

3

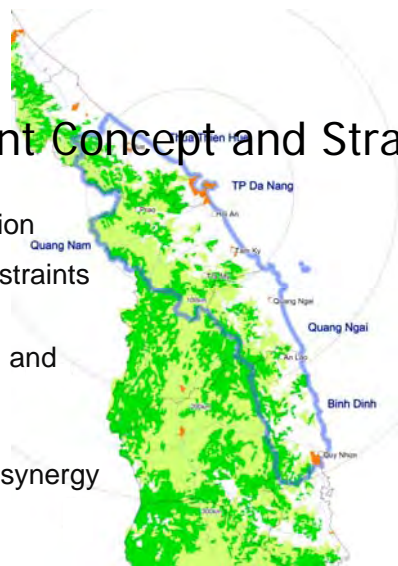
□ Framework of Provincial Workshops Conducted



4

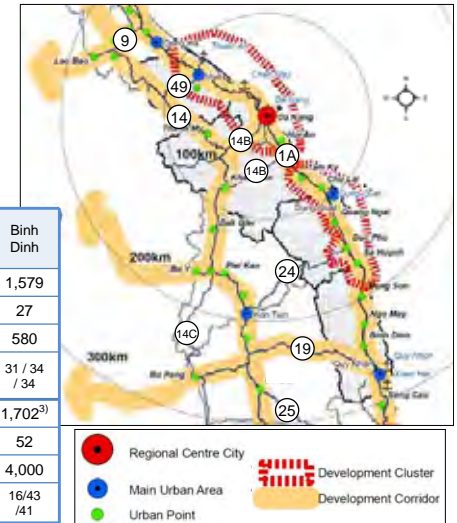
Regional Development Concept and Strategy

- Current development orientation
- Analysis on development constraints and opportunities
- Proposed development vision and strategies
- Possible role-sharing among provinces for development in synergy



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
	Employment (1/2/3) (%)	44 / 4 / 52	37 / 20 / 43	38 / 26 / 36	37 / 30 / 34	31 / 34 / 34
'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) (%)	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

Identification of Problems /Issues

	Da Nang City	T.T. Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ		
Area (km ²)	1,283	5,065	10,409	5,153	6,039	27,949		
Population (000)	807	1,145	1,490	1,311	1,579	6,332		
% of Urban Population	87	35	19	15	27	31		
Population Growth 02-07 (%/year)	Urban	3.58	3.91	5.75	3.33	2.15	3.60	
	Rural	-7.07	-0.42	-0.09	0.55	0.11	-0.15	
	Total	1.71	0.96	0.89	0.93	0.63	0.95	
GRDP	VND billion	15,107	10,314	12,630	9,885	14,649	62,585	
	Growth (% per year)	12.3	10.7	11.4	10.7	9.9	11.5	
	VND thousand / capita	18,726	9,006	8,479	7,538	9,278	9,884	
FDI 00-07 1)	Number of Projects	536	44	66	13	31	690	
	US\$ mil	4,751	443	558	863	363	6,979	
Trade	Import (US\$ mil)	522	55	212	20	142	951	
	Export (US\$ mil)	470	81	176	58	327	1,112	
Tourism	No of Tourists (000)	Foreign	50	636	892	17	35	1,629
		Domestic	20	667	698	244	352	1,981
	Receipt (US\$ mil) 2)	32	39	28	4	4	108	

Source: Most is 2007 data from Statistical Yearbooks, except the following data listed below.
 1) 2003-2007 data for Quang Ngai, 2002-2007 data for Binh Dinh
 2) 2006 data for Binh Dinh

Identified Problems by Commune Survey in CFZ

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
		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
		Seasonal Disruption (%)	11	39	25	79	36	41
		Vehicle Travel Time (min)	22	58	116	89	78	72

Source: DaCRIS Commune Survey, 2008

■ Environmental Problems Perceived by Commune Survey in CFEZ (% who replied "Significant problem" or "Very severe problem")

Province	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	
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

9

■ Development Constraints Perceived by Commune Survey in CFEZ (% who replied "Major obstacle" or "Severe obstacle")

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

10

■ Identified Development Opportunities in CFEZ (% who replied "High potential" or "Very high potential")

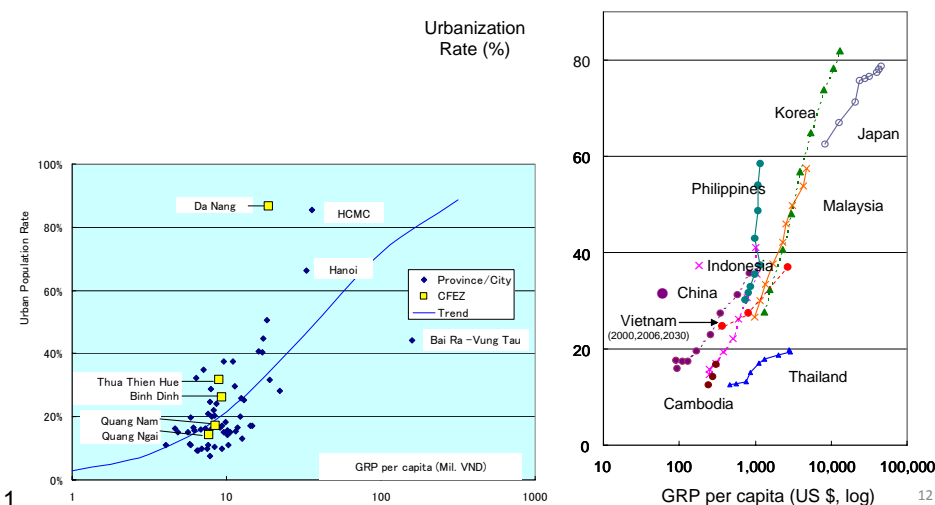
Province	Danang City	Thua Thien Hue	Quang Nam	Quang Ngai	Binh Dinh	CFEZ	
Agricultural Products	Crops	13	16	36	10	1	18
	Livestock	9	7	28	13	22	18
	Aquacultural	13	28	9	16	15	16
	Forestry	11	28	43	37	36	35
Processing Agricultural, Aquacultural, and Forestry Products	13	17	8	28	15	16	
Mining and Other Extractive 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

11

■ External Impacts on Development of CFEZ Region

◀ Urbanization Trend in Vietnam ▶



A8-111

12

■ Movement of the People in CFEZ

Increasing: 162,000 or 27,000/year (1999-2005) and 163,000 or 54,000/year (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 CFEZ	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: DaCRIS Commune Survey, 2008

13

■ 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

14

■ Proposed Vision

- To develop economically competitive, socially harmonized and environmentally sustainable region through much enhanced inter-provincial coordination

- Economic Development
- Ecological balance
- Ethnological harmonization

through

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

15

■ National Development Strategy

■ Transportation Development

- North-South High Speed Railway
- North-South Expressway
- Roads and Railways
- Ports and Shipping
- Aviation
- Inland water transport
- Inter-modal and logistics services

■ Urbanization Policy

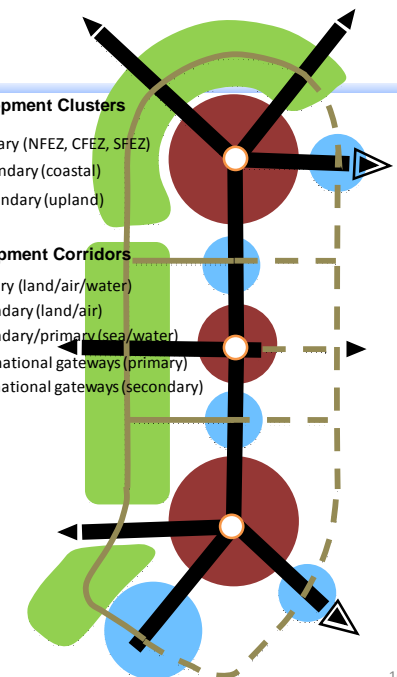
- Growth of secondary cities

□ Development Clusters

- Primary (NFEZ, CFEZ, SFEZ)
- Secondary (coastal)
- Secondary (upland)

□ Development Corridors

- Primary (land/air/water)
- Secondary (land/air)
- Secondary/primary (sea/water)
- ▶ International gateways (primary)
- ▶ International gateways (secondary)

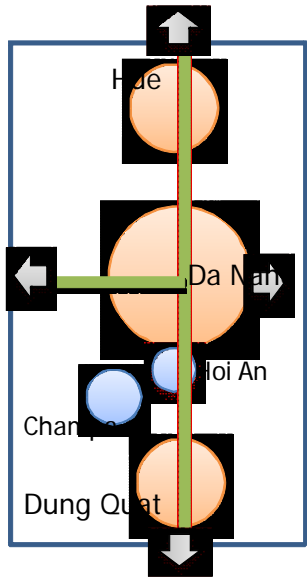


➔ *Integration of regional development strategies with national-level policies/projects*

A8-112

16

Strategic Integrated Transportation- Regional Development Concepts for the CFEZ



- The CFEZ is handicapped
- widening gap among NFEZ, SFEZ and CFEZ
- key to N-S integration
- large potentials: 3 world heritage sites, beaches and mountains
- ➔ Need for more intensive investment with government initiatives to stimulate private investments
- ➔ Direct connection with international market (especially via air connection)
- ➔ Accelerating urban development of Danang City
- ➔ Integrated development and role sharing among provinces in CFEZ

17

Danang–Hue Railway Improvement Project (VITRANSS2)

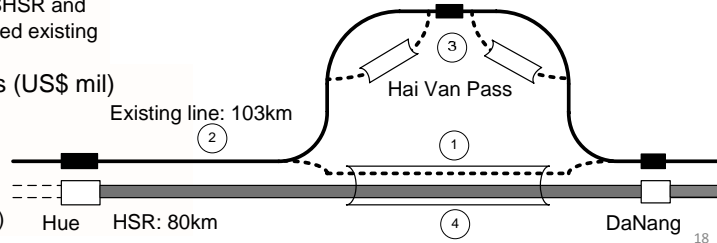
Stepwise Development Strategy

- construction of new tunnel with NSHSR standard for rerouted existing railway service
- improvement of remaining Hue-Danang section of existing railway
- improvement of existing railway in Hai Van Pass section
- development of NSHSR and relocation of rerouted existing railway to ③



Estimated Costs (US\$ mil)

- 1,535 (single track)
- 313 (double track)
- 415 (double track)
- 2,369 (double track)

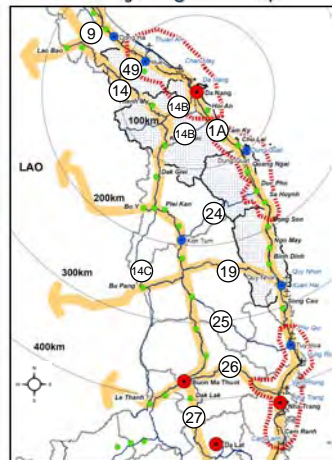


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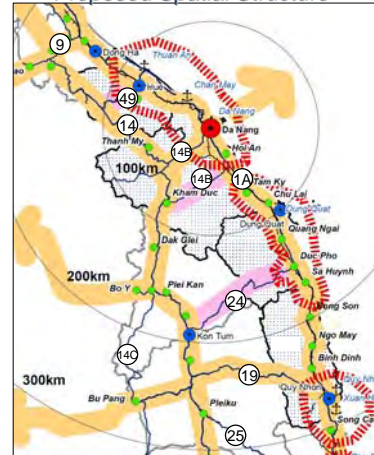
Alternative Scenario for Development

Spatial Structure of the CFEZ Region

◀ Existing Plan ▶



◀ Proposed Spatial Structure ▶



- Regional Centre City
- Main Urban Area
- Urban Point
- Development Cluster
- Development Corridor
- Developed Urban Corridor (Local)
- Development Clusters
 - ✓ Hue – Danang – Hoi An
 - ✓ Chu Lai – Dung Quat
 - ✓ Quy Nhon
- Development Corridors
 - ✓ NS (Coastal)
 - ✓ NS (Upland)
 - ✓ East – West (international)
 - ✓ East – West (local)
- Urban Centers

19

Rapid Assessment of Development Scenario

Sustainability Index		Scenario 1 : Baseline (Do Nothing)	Scenario 2 : Existing Plan	Scenario 3 : Enhanced Integration
Economic	<ul style="list-style-type: none"> Global competitiveness Complimentality in Vietnam CFEZ integration 	1	2	3
Social	<ul style="list-style-type: none"> Poverty free Reduction in inequality Access to services 	1	2 - 3	3
Environment	<ul style="list-style-type: none"> Ecology protected Pollution free Disaster preparedness 	1	2	2 - 3
Governance	<ul style="list-style-type: none"> Good management Financial sustainability Community involvement 	1	2	2 - 3

A8-113

Note: 3: Significant, 2: Moderate, 1: Insignificant

20

Development Strategies and Role-sharing

- 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, ...

- ✓ 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

21

Proposed Basic Orientation for the CFEZ

- 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
 - Strengthen intra-regional connectivity through network development
- 4 **Strengthen inter-provincial coordination** for strategic sector such as tourism, environment, transport, coastal management...
 - 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...

22

Possible Role-Sharing Among CFEZ Provinces

Main Agenda	T.T. Hue	Danang City	Quang Nam	Quang Ngai	Binh Dinh	
Gateway Function	B	(A)	B	B	B	
Strategic Development Themes	Tourism	(A)	(A)	A	A	
	Industry	B	B	B	(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: Main role, B: Secondary role

23

Danang City Development Strategy

- Situation analysis
- Development issues, constraints and opportunities
- Vision
- Strategies



A8-114

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	3.1
	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) DaCRISS HIS, 2008

25

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

26

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	19
	Washing machine	61	48	39	31	20	30	10	39	41
	Refrigerator	88	80	76	72	58	67	38	72	71
	TV	98	98	98	98	97	97	91	97	98
	Radio	13	7	30	8	22	7	5	13	58
	Computer	53	40	37	31	30	29	11	36	32
	Mobile phone	83	79	81	81	69	77	52	75	43
	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) HAIDEP HIS, 2005

27

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	100
	Piped water supply	95	86	83	46	38	57	7	67	62
	Toilet facility	9	9	23	0	2	14	8	10	79
	Gas	1	2	5	0	1	1	2	2	77
	Telephone	90	85	89	78	71	78	63	81	82
	Solid waste collection	96	99	99	85	81	96	26	85	84
	Sewage system	88	82	65	10	21	59	3	57	N. A.
	Internet	35	25	17	12	9	11	3	19	10
Primary Health Care ²⁾		98	99	97	100	98	94	93	97	N. A.
Education	Primary ²⁾	100	100	100	100	85	99	97	98	95
	Secondary ²⁾	100	100	99	100	84	97	99	98	

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

A8-115

28

■ 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) HAIDEP HIS, 2005

29

■ 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

30

■ 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) HAIDEP HIS, 2005

31

■ 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	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	Rest area

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

32

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	97
	Parking on Sidewalks	97	95	99	99	97	98	99	96
	Advertisement in Urban Areas	91	93	85	94	93	89	98	82
	Design of Buildings	81	83	74	74	68	77	79	77
	Overscale Buildings	86	92	75	69	75	80	91	83
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) HAIDEP HIS, 2005

33

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
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

34

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) 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

35

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

36

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

37



Key Factors for Development in Danang City Identified by the People

◀ Future Vision ▶

	%
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

◀ Main Themes for Development ▶

	%
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



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

39

Redefined Vision and Goal (Assumption)

Danang as Competitive Environmental City beyond Pollution Free

Da Nang needs to SEARCH for:

- ① Safety & Security ensured
- ② Ecological stability ensured
- ③ Amenity in urban area provided
- ④ Reduced poverty and powerful economy promoted
- ⑤ Cultural valued preserved
- ⑥ Hospitable people in place

◀ Three Basic Roles of Danang ▶

- Danang to be connected directly with the world and a center for high-quality services and business activities
- Danang to become a national center for environmental business and R&D activities
- Danang to become a national center for human resource development for services and knowledge industries

A8-118

40

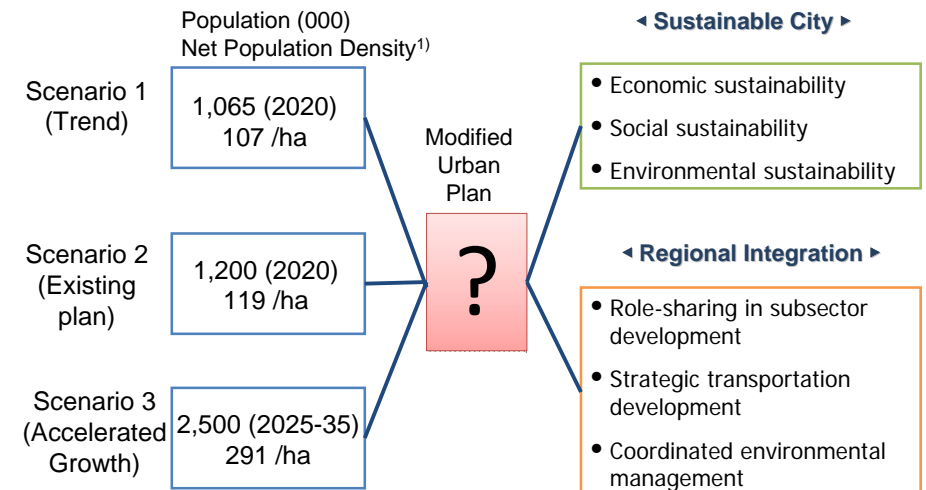
Suggested Development Framework for Danang City

- 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*

41

Urban Growth Scenario to be Considered in DaCRISS

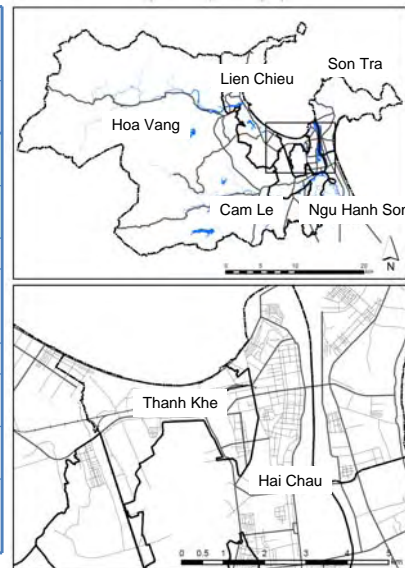


¹⁾ person/ha for urban area

42

Scenario 1 : Trend Growth (Baseline Scenario)

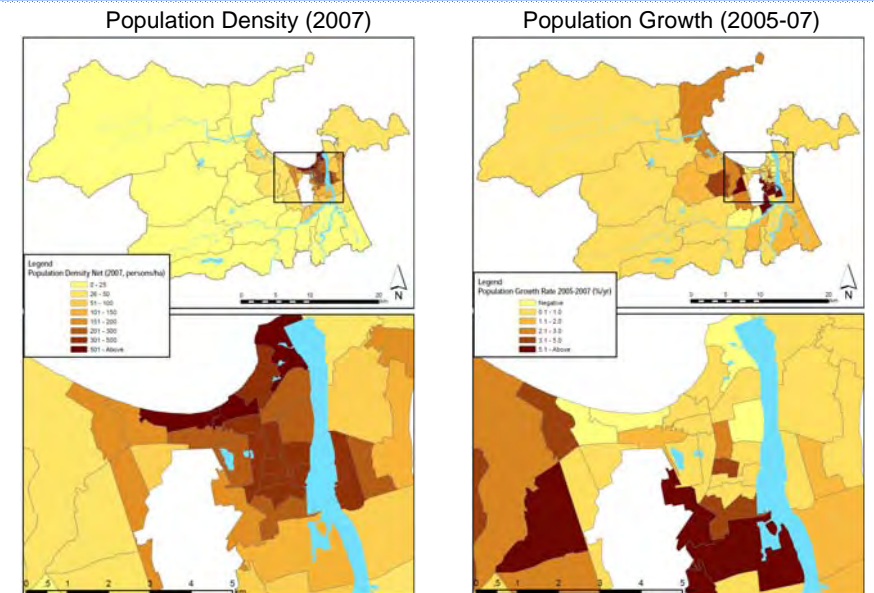
Districts	Population (000)		Growth Rate (%/year)		Population Density (no/ha)	
	2000	2007	2000-2004	2005-2007	Gross	Net
Hai Chau	184	195	1.4	1.0	93	99
Thanh Khe	154	167	1.2	0.6	180	221
Son Tra	103	120	2.5	0.7	20	54
Ngu Hanh Son	46	54	2.4	1.2	15	17
Cam Le	60	68	2.3	3.1	21	29
Lien Chieu	66	95	2.6	2.5	11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



43

- Total area
- Net of water surface, forests, etc.

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



A8-119

44

Scenario 2 : Current Construction Plan

- 2020 population: 1.2 million
- North-South direction development
- Extensive green network
- Relatively low density
- Unclear city centre
- Unclear TOD (transit-oriented development) concept



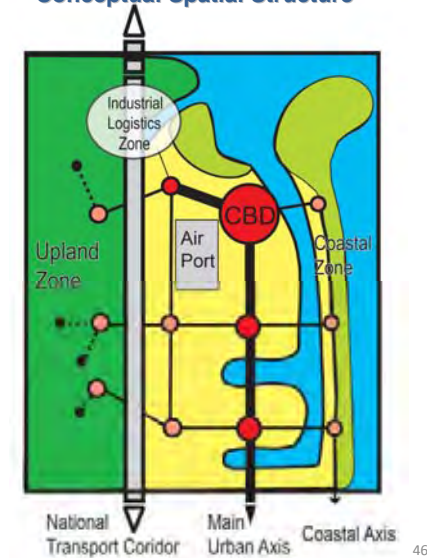
45

Scenario 3 : Accelerated Urban Growth

◀ Key Planning Concepts ▶

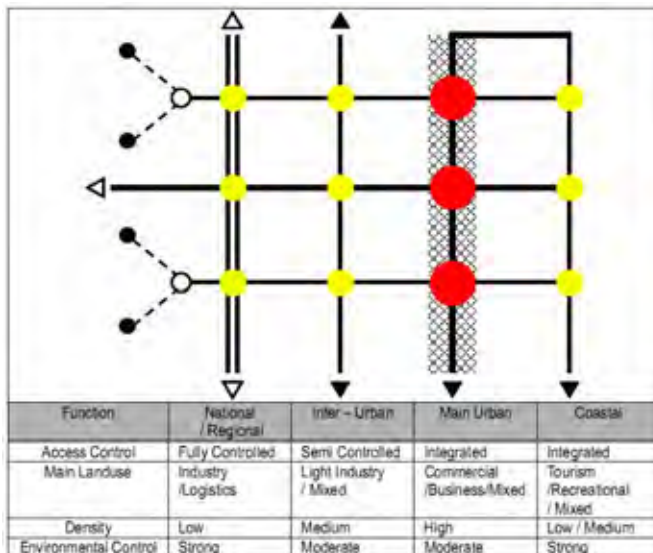
- 2025-35 population: 2.5 – 3.0 million
- North-South development direction (Hoi An to be integrated)
- Compact and high-density mixed land use integrated with strong public transport corridors
- Multiple urban centers with hierarchy
- Extensive green and open space network
- Well managed urban design and landscape

◀ Conceptual Spatial Structure ▶



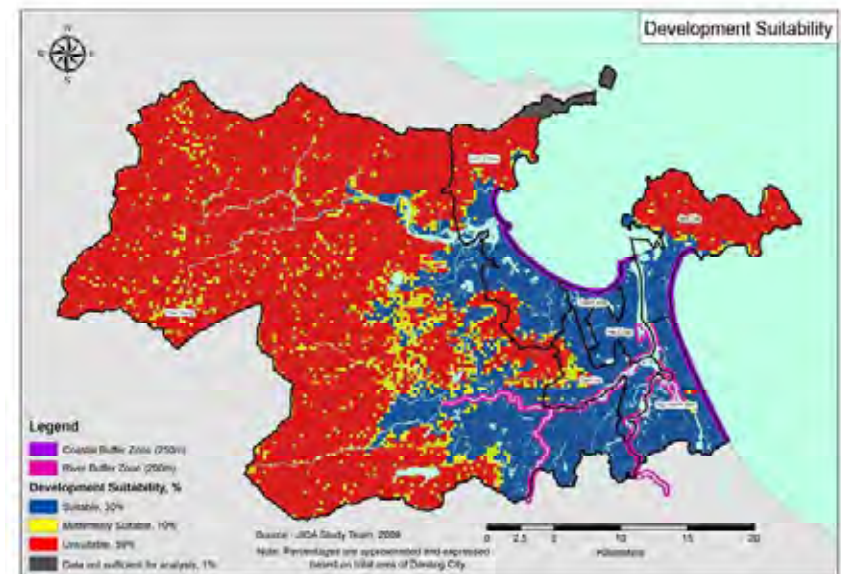
46

Structure of Transportation Network, Land Use and Environmental Control



47

The Areas Suitable for Development (preliminary)



48

Comparison of Alternative Scenario

		Scenario 1 : Trend Growth	Scenario 2 : Current Plan	Scenario 3: Accelerated Growth
Profile	Population(000)	1,065 (2020)	1,200 (2020)	2.5 – 3 million (2025-35)
	Urban Area (km ²) ¹⁾	89	89	89
	Urban Population Density (persons/ha) ²⁾	107	119	291
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

1) Net of River / Lake, Agriculture, Forest, and Green Space of existing landuse
2) Urban population = population excluding Hoa Vang District

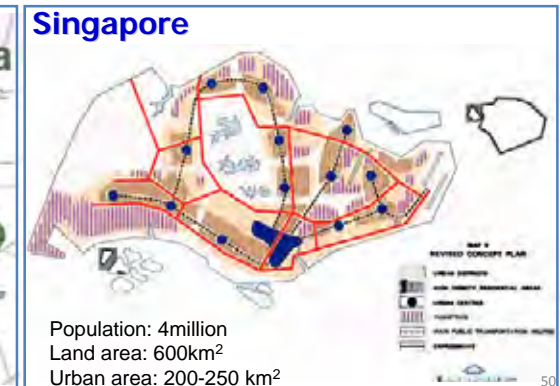
49

Examples of Good Practices

Sustainable Urban Development

Public Transport-based Urban Structure

Compact Urban Area integrated with Public Transport



Strategic Planning Elements to be Considered for Future Urban Form

Transportation Aspect

- ✓ **International Airport:**
 - integration with effective land transport
 - integration with urban development (Airport City)
- ✓ **Mass-transit System:**
 - LRT, BRT, mono-rail, street cars
 - TOD (transit oriented development)
- ✓ **Port:**
 - Cruise ship, pleasure purpose
- ✓ **Waterway System:**
 - network of bay, rivers
 - for pleasure, local transport

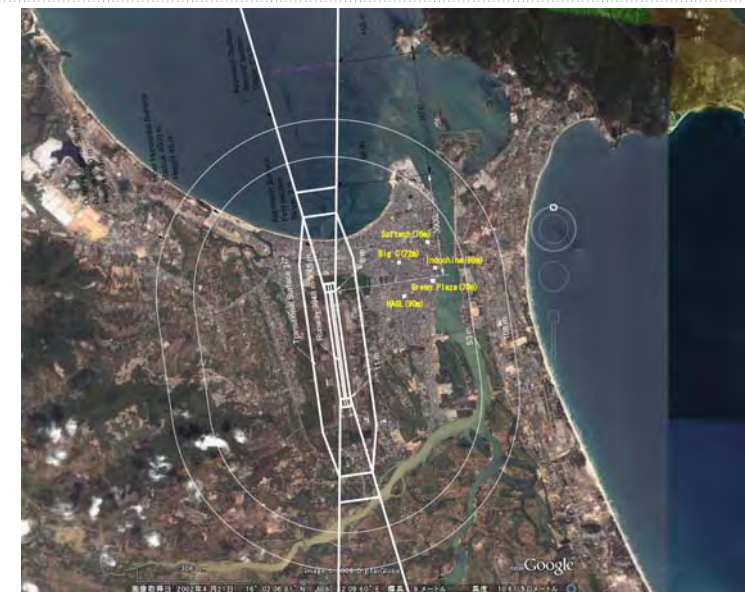
Urban / Environmental Aspects

- ✓ Development of competitive new CBD with international competitiveness
- ✓ Controlled development / rebuilding of existing urban areas (height, design, landscape)
- ✓ Linear development of coastal areas connecting those of Quang Nam including Hoi An : resort + urban function
- ✓ Connecting upland and coastal areas

Integrating transportation, urban and environment to develop competitive, livable and environmentally sustainable city

51

A Restriction to Urban Developments due to Airport



A8-121

52

▣ Subsector Strategies

- A. Economic development
- B. Social development
- C. Environment management
- D. Spatial development
- E. Housing and living conditions
- F. Urban transportation
- G. Urban infrastructure and utilities
- H. Human resource development
- I. Municipal finance
- J. Administrative capacity development

53

■ Subsector Strategies (Economic Development)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Low productivity compared to other cities in Vietnam • Lack of diversified services • Need for much strengthened economic base for Danang and the CFEZ 	<ul style="list-style-type: none"> • Develop cutting edge industries based on rich local potentials, e.g environment, tourism, human resource • Provide conducive investment environment for all including SMEs • Strengthen business linkages between the city and CFEZ, NFEZ, SFEZ as well as the world 	<ul style="list-style-type: none"> • Improve management of IZs • Accelerate equitization of SOEs and private sector development • Establish integrated/coordinated tourism plan for the CFEZ in association with strategic infrastructure, facilities and products • Promote locations of environmental business and R&D institutions under coordinated National Government policy • Establish human resource development business including higher education, vocational training, health care

54

■ Subsector Strategies (Social Development)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Need for farther reduction in poverty and inequality • Need for filling demand-supply gap in urban services • Need for improved security against crimes, and on food, health 	<ul style="list-style-type: none"> • Expand demand-driven, improved basic infrastructure services and safety net for all, especially the poor • Empower community initiatives to attend local issues effectively • Enhance people's awareness on urban development and management issues and agenda 	<ul style="list-style-type: none"> • Develop health care facilities including new general hospital, advanced medical technology center • Develop more schools including kindergartens, elementary/secondary schools and high schools • Develop a laboratory for nutrition test and food sanitation/safety control • Develop cultural/sports/community parks at city and community levels • Promote development of nursery centers

55

■ Subsector Strategies (Environmental Management)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Need for reduction and control of air, water and soil pollutions • Vulnerability to various natural disasters • Endangered eco-systems • Commitment to global environmental agenda 	<ul style="list-style-type: none"> • Establish an effective system and mechanism to reduce and control to allowable levels • Strengthen disaster preparedness and damage prevention measures • Develop inter-provincial mechanism to preserve ecosystems • Establish effective environmental management system and institutions 	<ul style="list-style-type: none"> • Implement existing and expanded air, water and soil pollution reduction programs • Strengthen monitoring and surveillance system against various pollutions • Conduct hazard mapping and risk analysis against natural disasters to establish prevention measures, warning system and enhance preparedness • Establish effective environmental zoning to protect valuable ecosystems • Implement public awareness campaign, environmental education, administrative capacity building and human resource development

56

■ Subsector Strategies (Spatial Development)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Sprawling urban areas • Lack of landuse control • Lack of growth management strategies 	<ul style="list-style-type: none"> • Establish clear orientation for envisioned urban form and structure for future Danang City (e.g public transport based compact urban area) with anticipated population of 2.5-3 million • Establish effective mechanism to control/ guide landuse development • Implement urban-transport integrated development strategies 	<ul style="list-style-type: none"> • Update existing construction plan in a way to incorporate growth strategies • Strengthen development control and permission system based on updated master plan, guidelines and zoning system • Formulate integrated urban plan for expanded urban areas of Quang Nam Province

57

■ Subsector Strategies (Housing and Living Environment)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Lack of affordable housing for low income group and migrants including workers and students • Vulnerable housing structure against natural disasters • Need to respond to changing lifestyle of the people 	<ul style="list-style-type: none"> • Establish sustainable mechanism to provide affordable housing for low income group • Develop improved housing standards and designs • Establish comprehensive living environment improvement mechanism 	<ul style="list-style-type: none"> • Expand public housing provision • Provision of adequate resettlement housing, industrial workers housing and accomodations for students • Provision of housing residential land to the market

58

■ Subsector Strategies (Transportation Development)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Worsening traffic safety and congestions at certain roads sections/ interseccions • Lack of parking in city center • Lack of public transport services • Need to be prepared for increasing number of cars 	<ul style="list-style-type: none"> • Develop roads as an effectively configurated network with hierarchy and in integration with landuse • Improve bottlenecks and black spots through traffic management • Establish parking policy and necessary facilities • Expand and strengthen urban bus services • Prepare development of mass-transit system • Establish effective interface between urban and regional transport (air, road, rail and shipping) 	<ul style="list-style-type: none"> • Construct/upgrade roads and bridges at locations identified in updated Master Plan • Implement traffic management program for key corridors and areas • Develop urban bus service in phases • Develop urban water transport services • Establish core urban development corridor and prepare development of mass-transit system • Promote integrated development of high-speed railway, expressway, airport and port expansion in integration with urban transportation

59

■ Subsector Strategies (Urban Infrastructure and Utilities)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Need for provision of adequate infrastructure services to cover the entire population • Need for improvement of efficiency in service provision • Need for enhanceme nt of cost recovery in investment 	<ul style="list-style-type: none"> • Develop efficient and effective supply network and facilities including water supply, power, telecommunication, drainage and sewerage, solid waste management • Improve operation and management mechanism • Promote user-pay principle and awareness for saving consumption 	<ul style="list-style-type: none"> • Upgrade existing power supply system including construction of new power plants and introduction of renewable energy production • Expand water supply capacity including reduction in waster loss, water recycling system, new water resource development etc. • Improve drainage/sewerage system including building central waste water treatment system in IZs, medical waste water treatment, septic tanks in rural areas, etc. • Improve solid waste management system including additional gargage leakage treatment, medical waste/poisonous waste treatment, hazardous waste treatment, garbage segregation at source and recycle, etc. • Introduce various O&M improvement measures including capacity building, new technologies, introduction of PPP, etc • Establish proper tariff-setting, introduction of awareness campaign, promotion of 3Rs, etc

60

■ Subsector Strategies (Human Resource Development)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Lack of matching quality in human resource in service industries • Improvement of physical ability of the people • Need for strengthening human capacity for Danang and the CFEZ 	<ul style="list-style-type: none"> • Expand and upgrade higher education • Strengthen vocational training in compliance with sector development strategies • Expand interchange of human resources at national and international levels 	<ul style="list-style-type: none"> • Develop Danang University as a national center for advanced education and research including foundation of medical/pharmaceutical school, establishment of Environment Technology Center, etc. • Develop technical high schools and training centers for languages and strategic industries including tourism, services, healthcare, hospitality industries • Strengthen ties with international standard universities • Organize national/international exchange programs, conventions, seminars and meetings

61

■ Subsector Strategies (Municipal Finance Capacity Development and Management)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Lack of financial source • Improved use of financial source 	<ul style="list-style-type: none"> • Expand own funding source • Expand user-pay principle for urban services • Introduce PPP scheme • Improve financial management system including priority setting among projects 	<ul style="list-style-type: none"> • Strengthen tax mapping and collection • Review current tariff and fees on urban services to establish an improved system • Prepare PPP guidelines for urban development prospects. • Expand incentives and improve investment environment to attract FDI • Improve access to the Central Government funding and ODA

62

■ Subsector Strategies (Administrative Capacity Development)

Issues	Core Strategies	Projects/Actions
<ul style="list-style-type: none"> • Time-consuming approval process • Lack of public information • Lack of implementation mechanism for approved Master Pan 	<ul style="list-style-type: none"> • Strengthen city management capacity to sustain accelerating growth. • Strengthen planning capacity and institutional framework for urban development and management. • Establish effective public participation mechanism in urban development and monitoring process. 	<ul style="list-style-type: none"> • Application of ICT to all phases of administrative work to promote e-government initiatives. • Prepare adequate guidelines for urban development based on updated master plan. • Provide city performance indicators which are open to all stakeholders.

63

End

... thank you for your attention.

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64