



**THE REPUBLIC OF THE UNION OF MYANMAR
MINISTRY OF TRANSPORT AND COMMUNICATIONS
MYANMA RAILWAYS**



Rail Infrastructure Development Plan and Investment Opportunities in Myanmar



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Brief Introduction on situation of Transport Infrastructure in Myanmar



Overview of Transport Infrastructure In Myanmar



Myanma's Profile

- Population – 54.283 Million(March,2018)
- Area -676,578 Km²
- Coastal Line - 2800 km
- Road Length - approximately 150,000 km
- Railways Route Length - 6110.5 Km
- GDP per Capita – 1285 USD in 2018

Current Status

- Myanmar's Transport system lags behind ASEAN
- 60% of highways and rail lines in poor condition
- 20 million People without basic road access
- \$45-60 Billion investments needs (2016-2030)
 - Reduce transport costs by **30%**
 - Raise GDP by **13%**
 - Provide basic road access to **10 million** people and save People's lives on the roads.

Notable Geographical Feature of MYANMAR



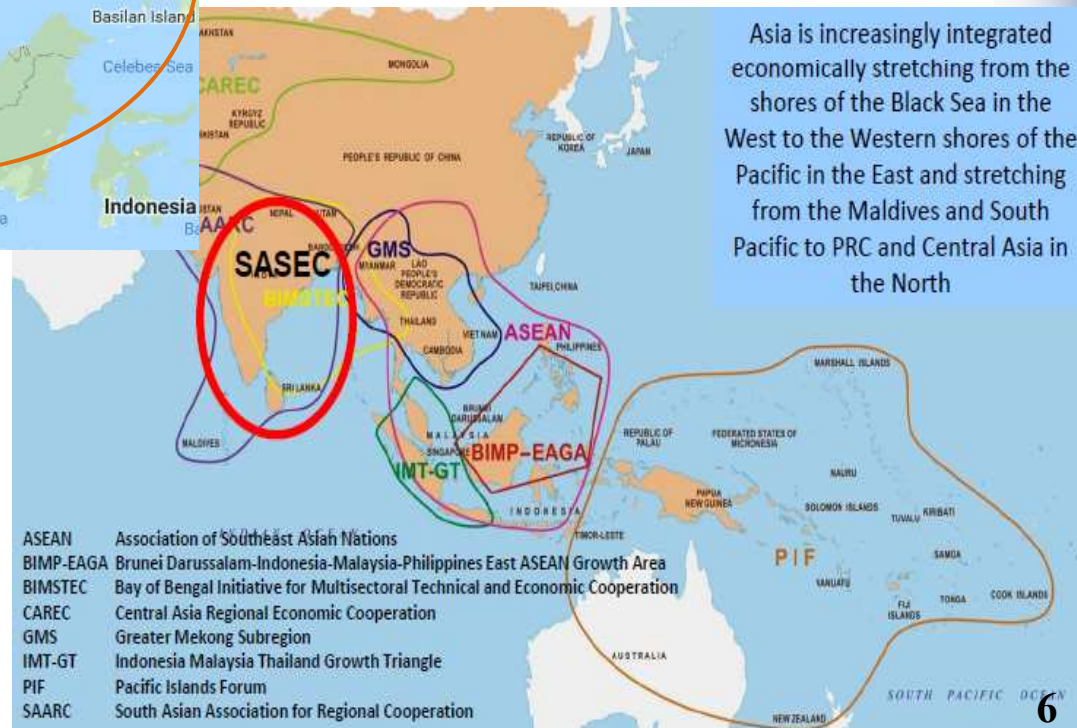
- As land - bridge between South Asia and Southeast Asia as well as with China
- Steep and long mountain ranges hamper the development of transport links with neighbors.

Notable Geographical Feature



- Situated at a cross-road of 3 large economic centers.
- At an intersection of tri-polar economic mass

- As a crucial joint between BIMSTEC, SAARC, SASEC and GMS, ASEAN.



Transport Sector Administration



Ministry of Transport and Communications
Aviation, Maritime, Road and Rail transport



Ministry of Construction
Construction and maintenance of national roads and bridges



Ministry of Agriculture, Livestock and Irrigation
Construction and maintenance of roads and bridges in rural areas



Ministry of Border Affairs
Construction and maintenance of roads and bridges in border areas



Naypyitaw Development Committee



Yangon City Development Committee



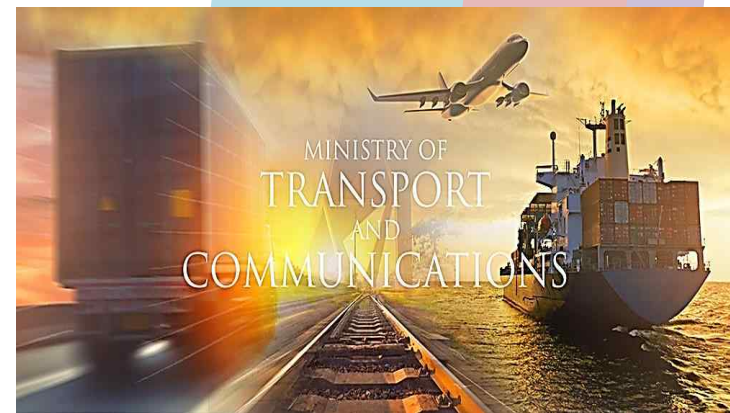
Mandalay City Development Committee

Urban Transport



18 Units of Departments, Enterprises and Institutes under Ministry of Transport and Communications

Ministry of Transport and Communications



Formulation for the National Transport Master Plan Study

- Started in December, 2012 and completed in 2014 by the assistance of JICA.
- Master Plan is prepared in line with-
 - National Spatial Development Framework,
 - Regional Integration,
 - Demographic Framework,
 - Environmental Framework,
 - Financial Framework,
 - Economic Growth, and
 - Demand Forecast.

Projects in MYT-Plan

▪ Road Sector	(48) Projects
▪ Rail Sector	(14) Projects
▪ Maritime Sector	(15) Projects
▪ Inland Waterway	(33) Projects
▪ Air Sector	(32) Projects
▪ Total	(142) Projects

Transport Sector Vision

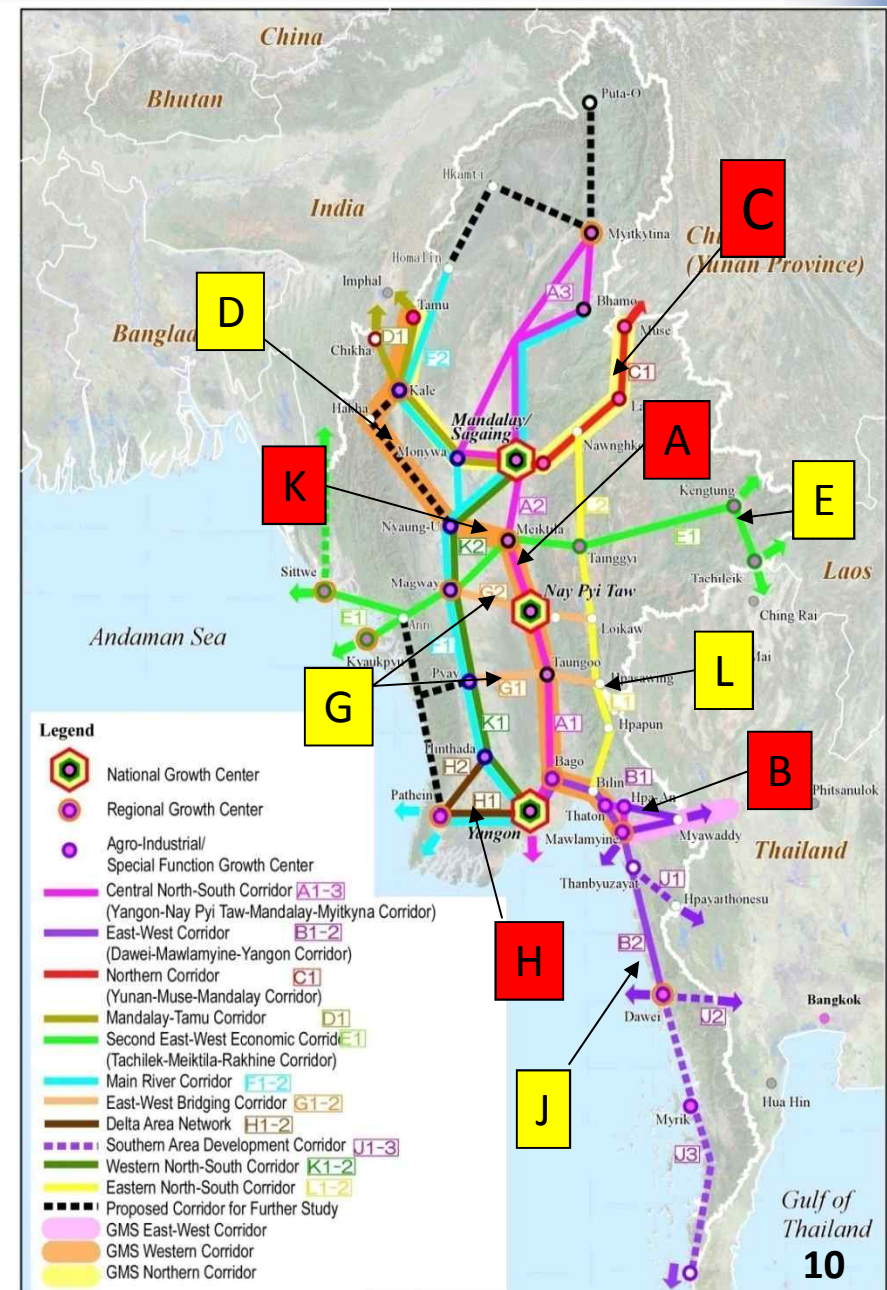
“To develop an efficient, modern, safe, and environmentally - friendly transportation system in a coordinated and sustainable manner that embraces all transport modes for the benefit of the country and people of Myanmar.”



Corridor-Based Development Approach

10 Major Corridors

- A** Central North-South Corridor
 - B** East - West Corridor
 - C** Northern Corridor
 - D** Mandalay - Tamu Corridor
 - E** Second East - West Corridor
 - G** East - West Bridging Corridor
 - H** Delta Area Network
 - J** Southern Area Development Corridor
 - K** Western North-South Corridor
 - L** Easter North-South Corridor
- Priority corridors for urgent investment**



Preparation for the National Logistics Master Plan Study

Objective of the Project

- To formulate a strategic and workable logistics development master plan by adding and supplementing the existing National Transport Master Plan.

Vision

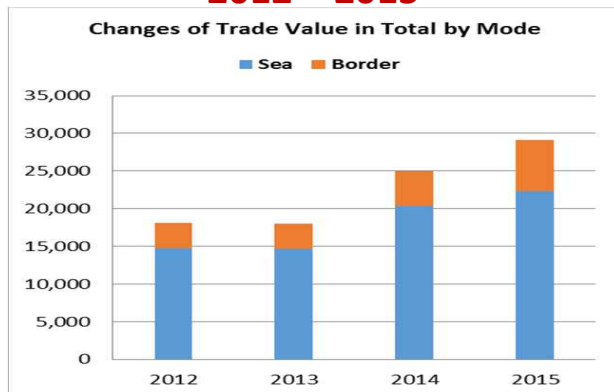
- To create an efficient, competitive and environmentally friendly logistics system in accordance with regional and international perspectives including the enhancement of multimodal transport for economic development and poverty reduction.

Policy Framework and Time Frame

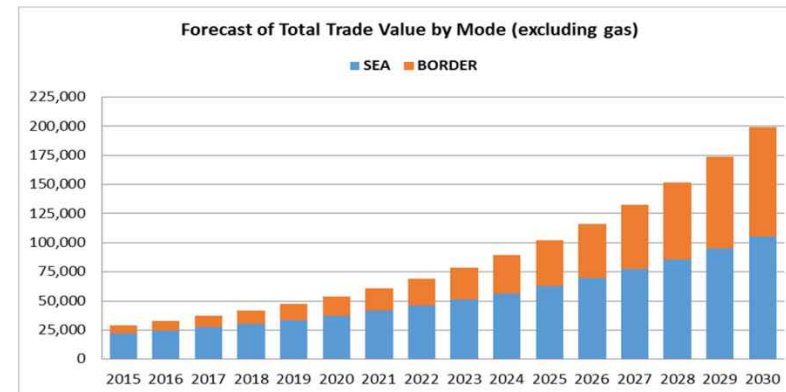
- In line with the parameters of the existing national plans and policies
- Formulated to support and materialize these plans and policies.
- The Project was started from June, 2016 and submitted Final Report in February, 2018.

Trend in Myanmar's Trade by Gateway

2012 – 2015



2015 -2030

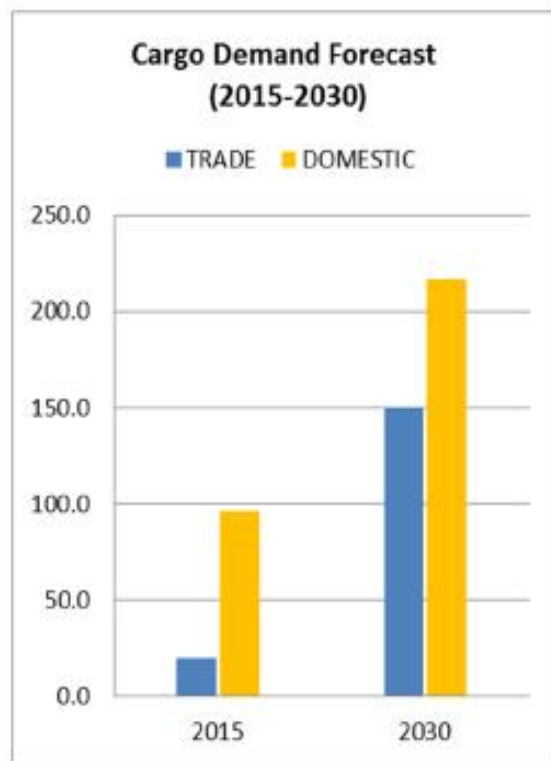


Source: Study Team for projection based on the past trend.

Preparation for the National Logistics Master Plan Study (MYL-Plan)

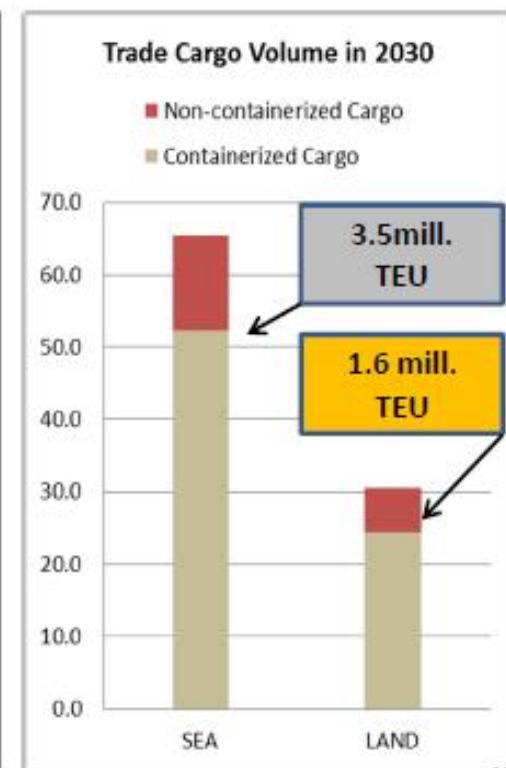
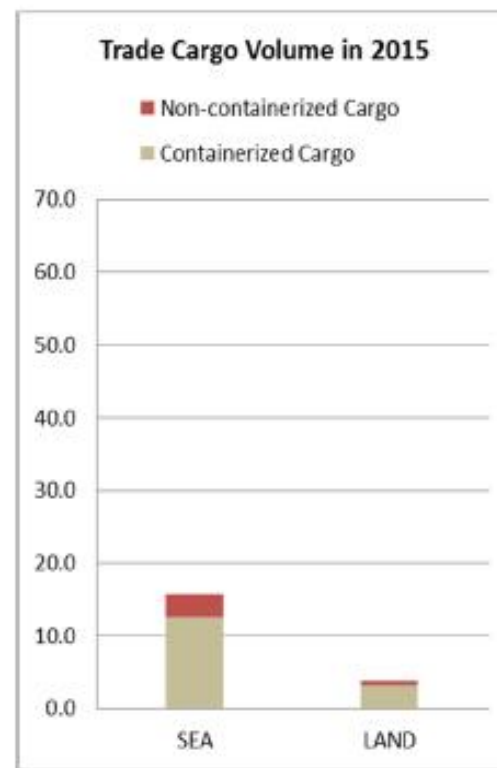
Cargo Demand Forecast

Total Volume
2030 **312 million tons**
2015 **169 million tons**



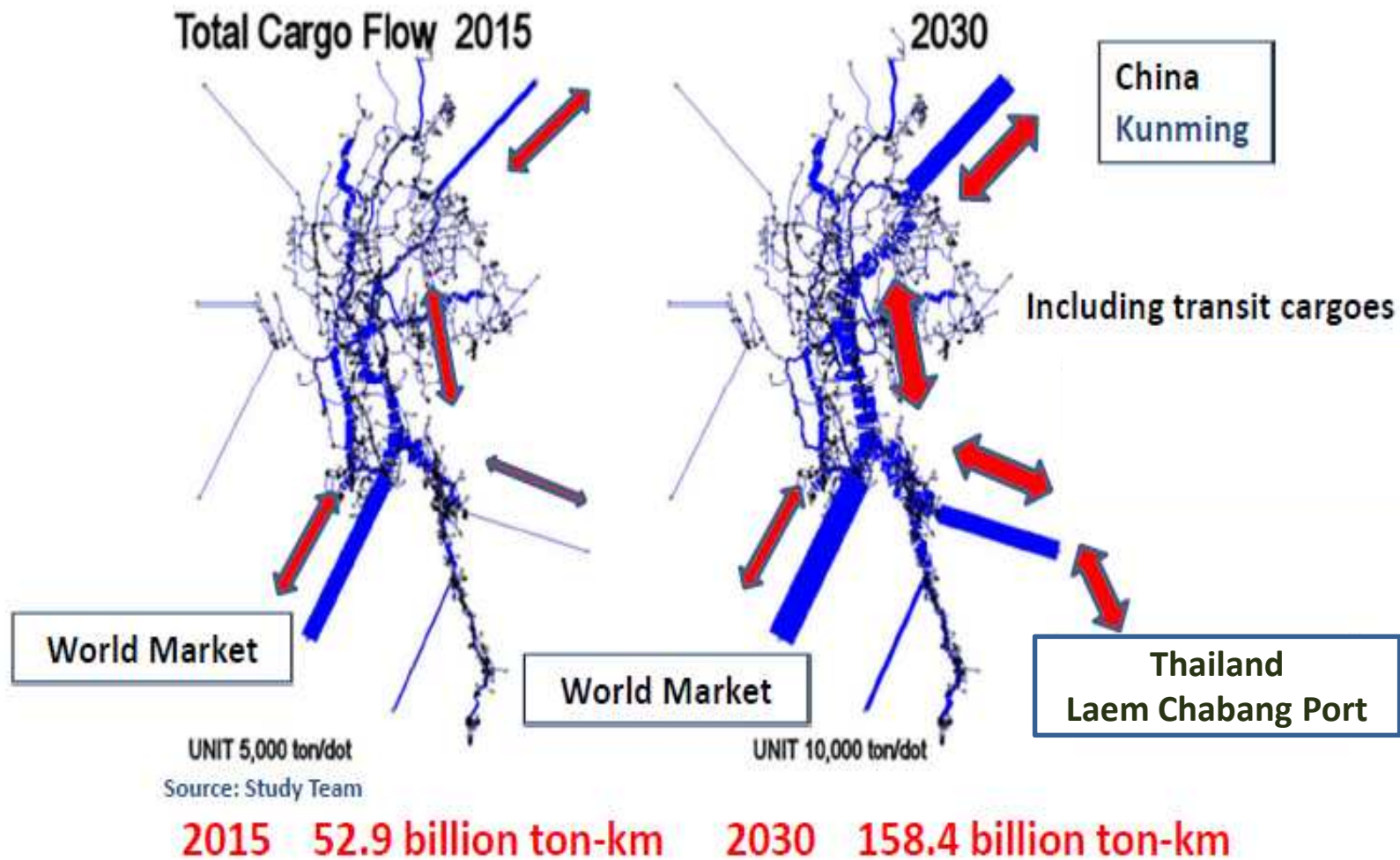
Source: Study Team

Change of Trade Cargo Volume (Ex. Empty Cont.)
2015 - 1.0 mill. TEU → 2030 - 5.1 mill. TEU

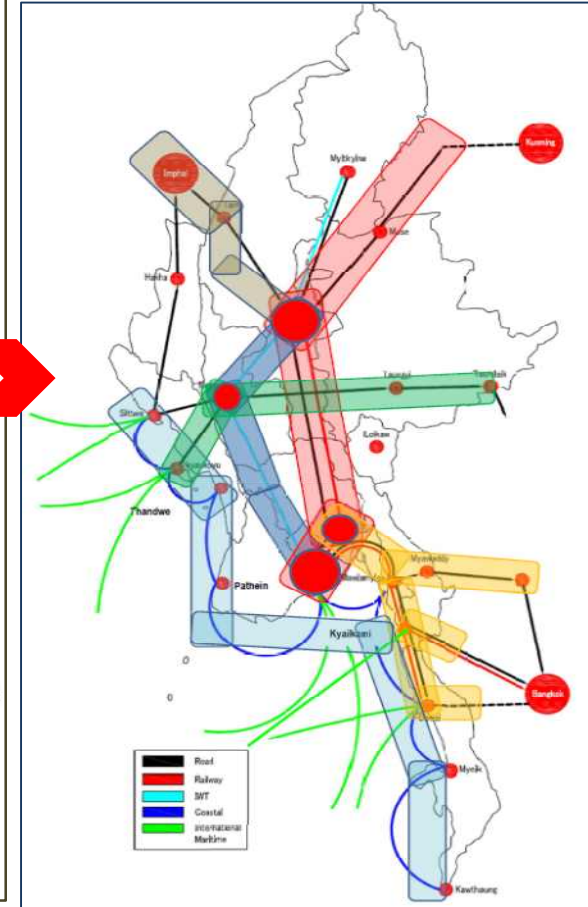
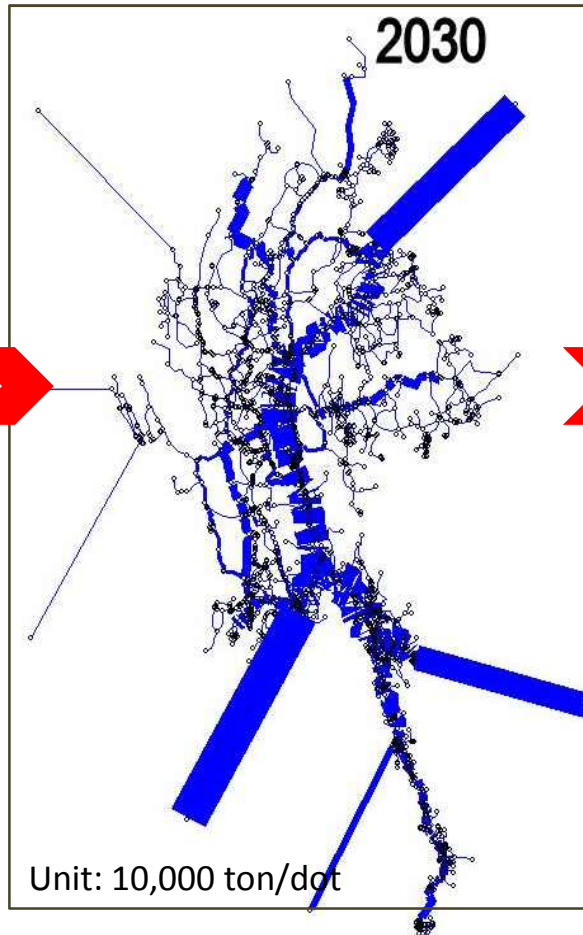


Preparation for the National Logistics Master Plan Study (MYL-Plan)

Cargo Demand Forecast



Transforming for the Logistics Corridors



**TRANSPORT CORRIDOR
(MYT-Plan, 2014)**

**CARGO FLOW PATTERN
IN THE FUTURE**

**FORMULATED LOGISTIC
CORRIDOR NETWORK**

Preparation for the National Logistics Master Plan Study

Identified and Prioritized Projects and Estimated Costs

■ Number of Identified Projects up to 2030

	Total	National Transport Master Plan (MYT-Plan)	Logistics
Projects	167	108	59
US\$ 1 billion	41	18	23

■ Type of Projects Identified

Hard Components (167 projects) :

- 1) Logistics facilities (truck terminals), transport infrastructure (roads, railways, ports, river ports, domestic ports, airports)
- 2) Creation of Multi-modal Freight Logistics Hubs at Strategic Locations / nodes.

Soft Components (22 projects) :

- 1) Legislation of Laws and Regulations
- 2) Capacity Building of Administrators
- 3) Fostering logistics providers
- 4) Undertaking various feasibility studies

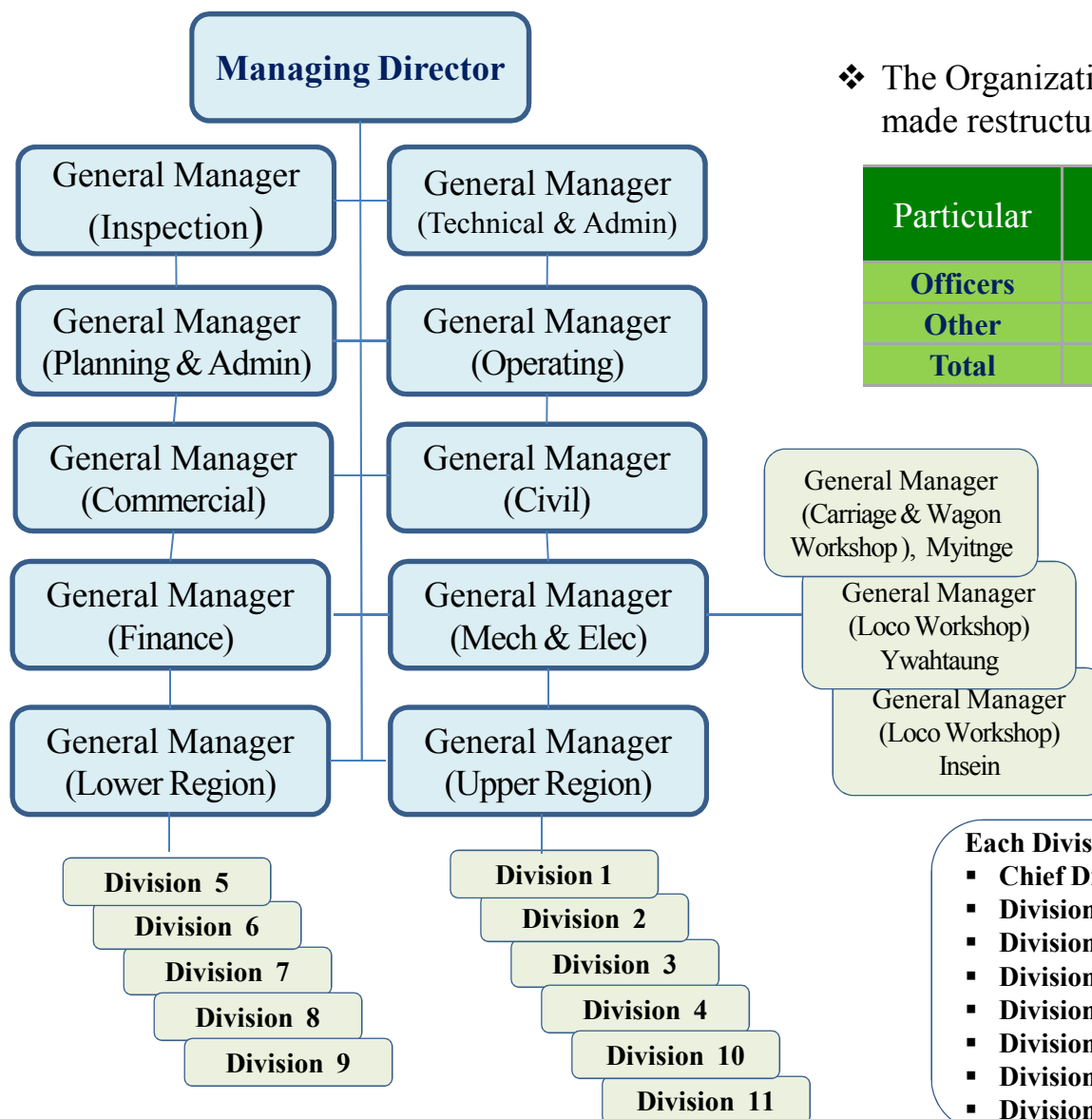
FACTS of MYANMA RAILWAYS



- Started in 1877 (142 year old)
- Single Route 5405.285 km
- Double Route 705.196 km
- Total Route Length 6110.481 km
- Total Track Length 7944.320 km
(The longest transport rail network among ASEAN members.)
- Bridges - 12103 Nos
- Tunnels - 12 Nos
- Railway Stations - 960 Nos
- 1000 mm gauge (Narrow gauge)
- Daily train operating (Total 422 nos. of trains) (168 Inter-City, 229 Urban and Suburban, 25 freight)
- Current Employment strength -20,900



MYANMA RAILWAYS ORGANIZATION CHART



❖ The Organization Structure of the MR had been made restructure on February 2016

Particular	Section Strength	Existing Strength June,2019
Officers	457	348
Other	32,550	19,330
Total	33,007	19,678

Each Division has been composed with;

- Chief Divisional Officer
- Divisional Traffic Manager
- Divisional Engineer(Mechanical)
- Divisional Engineer (Civil)
- Divisional Engineer(Signal & Telecom)
- Divisional Commercial Manager
- Divisional Finance Manager
- Divisional Medical Officer

Current Infrastructure development Projects by External Assistance



The Oldest Railway Bridge in Myanmar, "Gokteik Viadut"
Construction start/end: 28-4-1899/1-1-1900
Total length: 689 Metres (2,260 ft)

Yangon-Mandalay Railway Improvement Project



Scope of Works

- Civil & Track Works, Bridge work, Installation of new signaling system, Procurement of Modernized DEMU, Establishment of Workshop and depot, etc.

Phase 1 (Yangon - Taungoo)

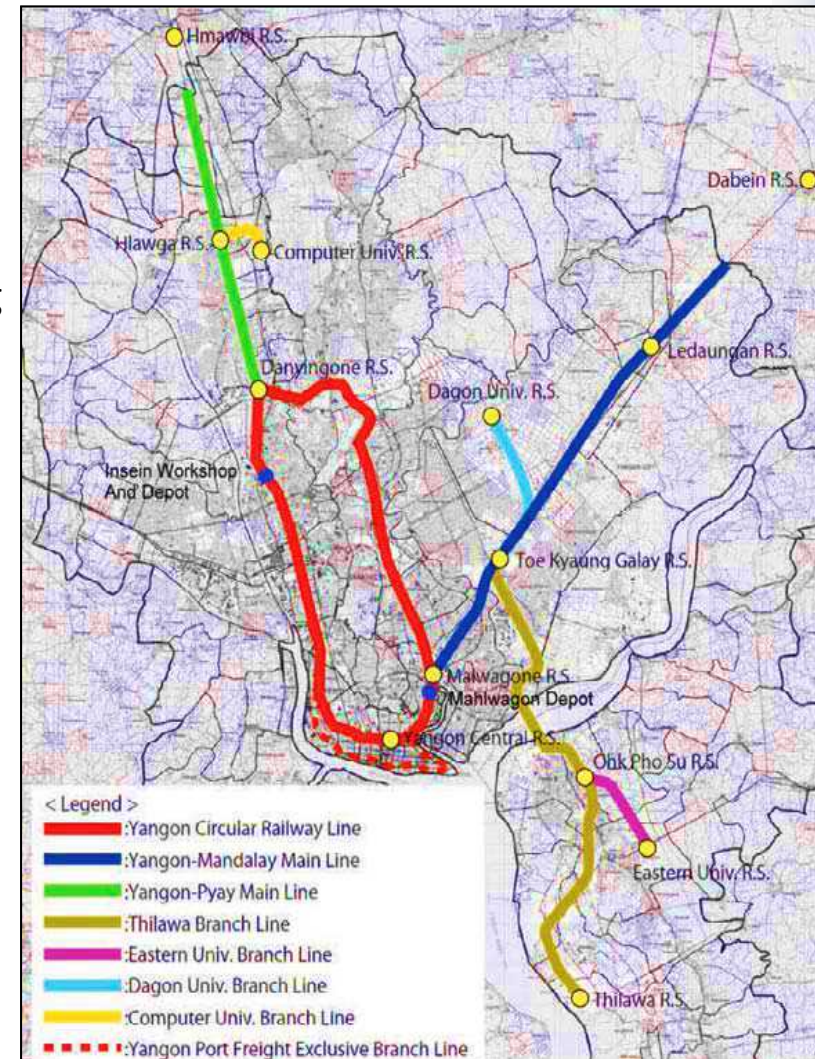
- Conducted for F/S on Sep,2014 and Detail Design Studied completed on June,2016
- Estimated Cost JPY (91.179) Billion (As DD Report)
- Signed Consultancy Services Agreement on Dec, 2016
- Invited the Contractors by dividing 8 Packages on March, 2017
- Construction Period – 2018 to 2023 (6 Years)

Phase II (Taungoo- Mandalay)

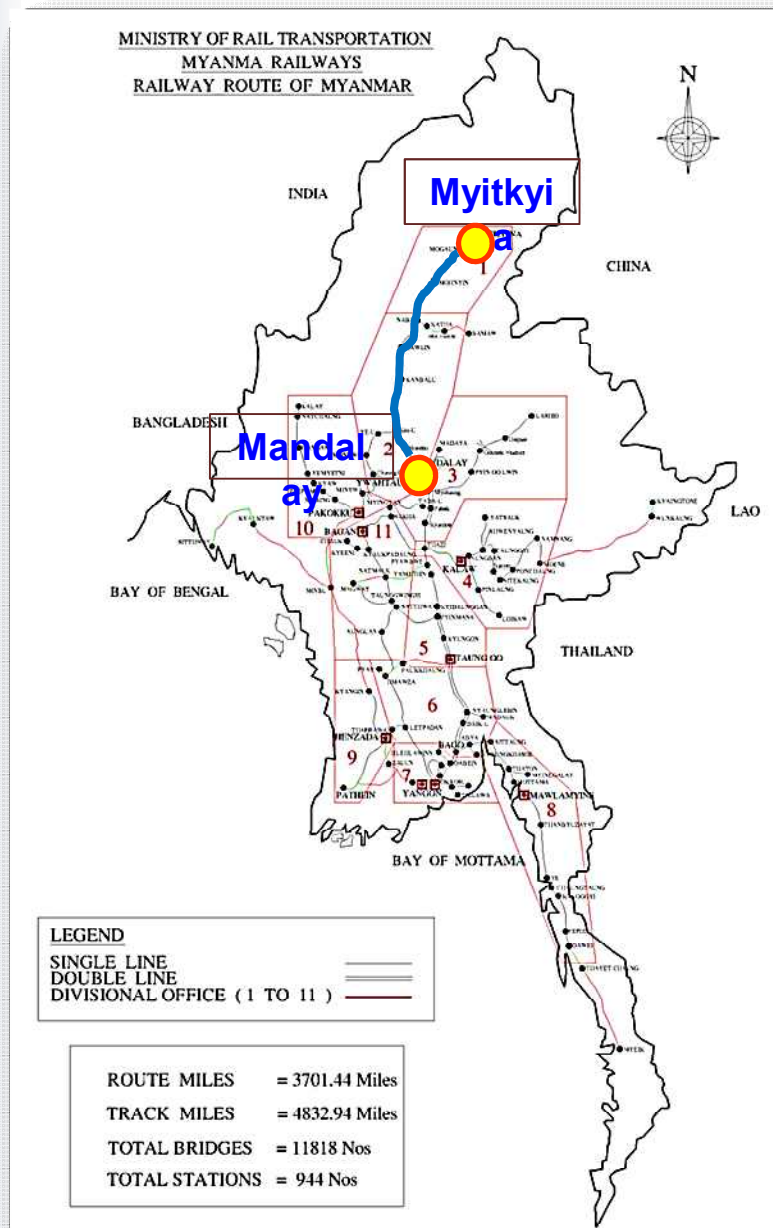
- Conducted for F/S on Oct,2017 and Detail DD Study started on April, 2018 and expected to complete Sep,2019
- Estimated Cost JPY (191.069) Billion (As DD Report)
- Signed Consultancy Services Agreement on
- Planned to invite the 10 Nos. of Contract Packages
- Construction Period - 2019 to 2025 (6 Years)

Yangon Circular Railway Line Upgrading Project

- **The project Financing consists of two parts:**
 - Japanese ODA Loan (US\$ 207.8 million)
 - The other is cover by National Budget (US\$ 43.38 million)
- **Scope of Works;** Civil & Track Works, Signaling Works, Procurement of Modernized DEMU.
- **Project Period** 2017 to 2022 (6 Years)
- **Activities to Implement**
 - Completed Basic Design on Feb,2017
 - Under construction for Civil Works by Local Contractors
 - 2 nos. of Tender packages for Signaling Works and Procurement of Modernized DEMU are being invited.
- After completion of project, travel time of passenger trains will reduce from 2 hours and 50 minutes to 1 hour and 50 minutes



Mandalay –Myitkyina Railway Line Rehabilitation Project



Status of the Project

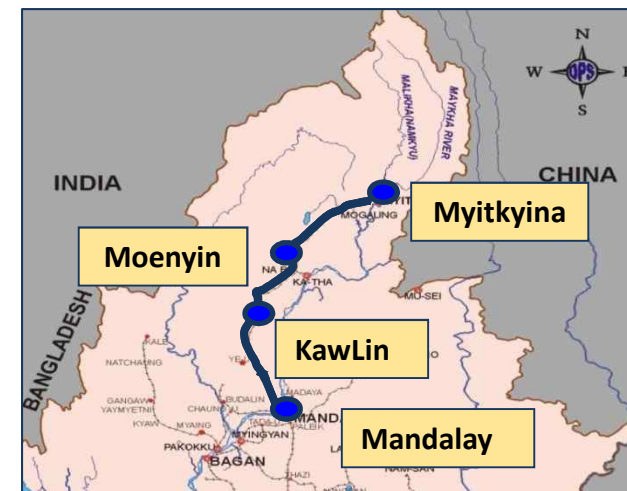
- 547.4 Km Long, Single lane, Meter gauge Track
- High gradients and Curves on some portion,

Divided into 3 priority sections

- Mandalay - KawLin, Section - I (3rd Priority)
- KawLin - Moenyin, Section - II (1st priority)
- Moenyin - Myitkyina, Section - III (2nd priority)

Activities to upgrade

- First priority portion of section II (about 42 Km) by Korea EDCF Loan USD 125 Million.
- F/S has been done by Technical Assistance of Korean EXIM Bank.
- Under Loan Negotiation process to implement the project



Yangon-Pyay Railway Improvement Project

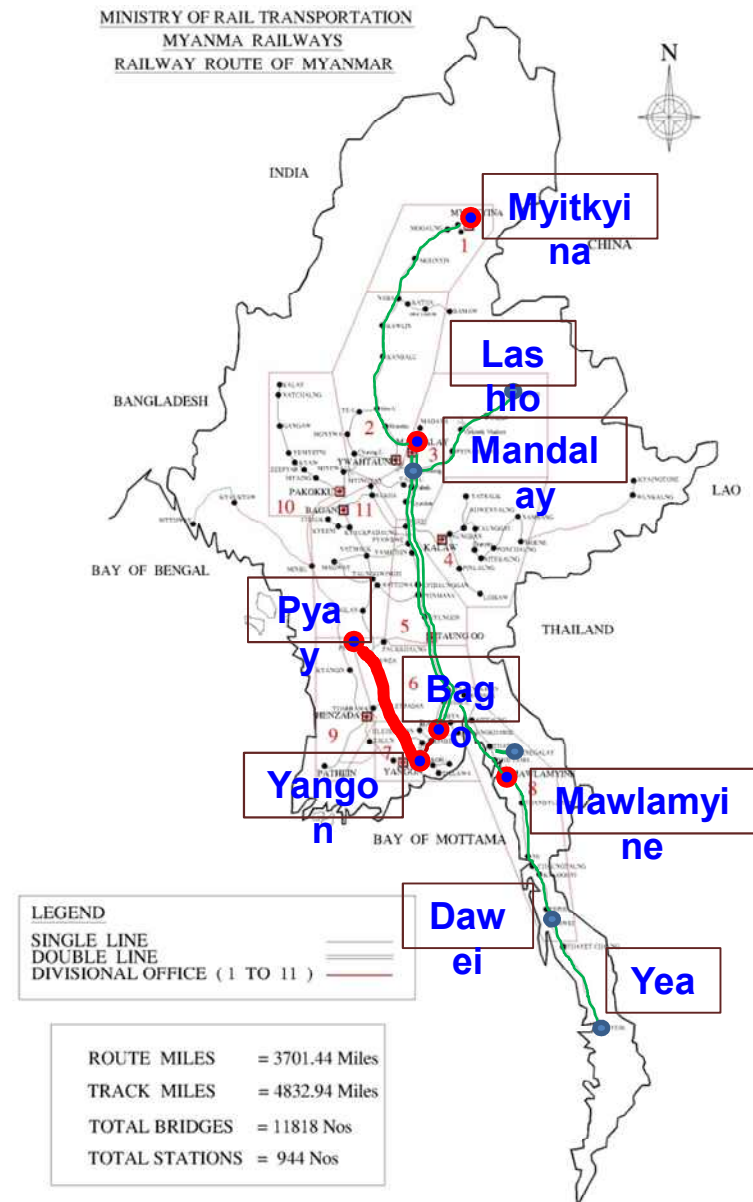
- It was first introduced rail line in Myanmar since 1877.
- Yangon(Danyinkone)-Pyay -148.25 Route Mile
- Track Mile -162.25 Mile

Scope of Works

- Installation of new track and signaling system
- Railway bridge construction and rehabilitation
- Station improvement works
- New foot over bridge (FOB) installation

Activities to Improvement

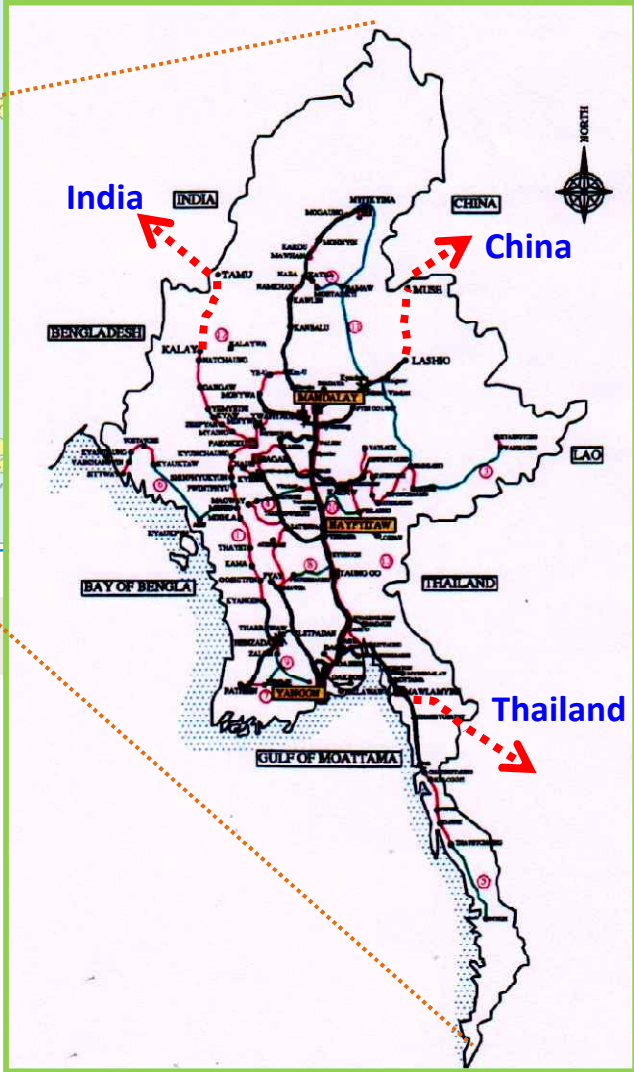
- Project Cost is approximately –Approx; \$ 200 Mil.
- Surveyed at June,2017
- Signed MoD for Project Preparation in Dec,2018.
- Conducting the F/S by ADB's Technical Assistance
- Under Loan Negotiation Process with ADB





Planning for International Railway Connectivity in Myanmar

Missing Links in the Trans-Asia Railway Network



Railway Lines of International Importance in Myanmar

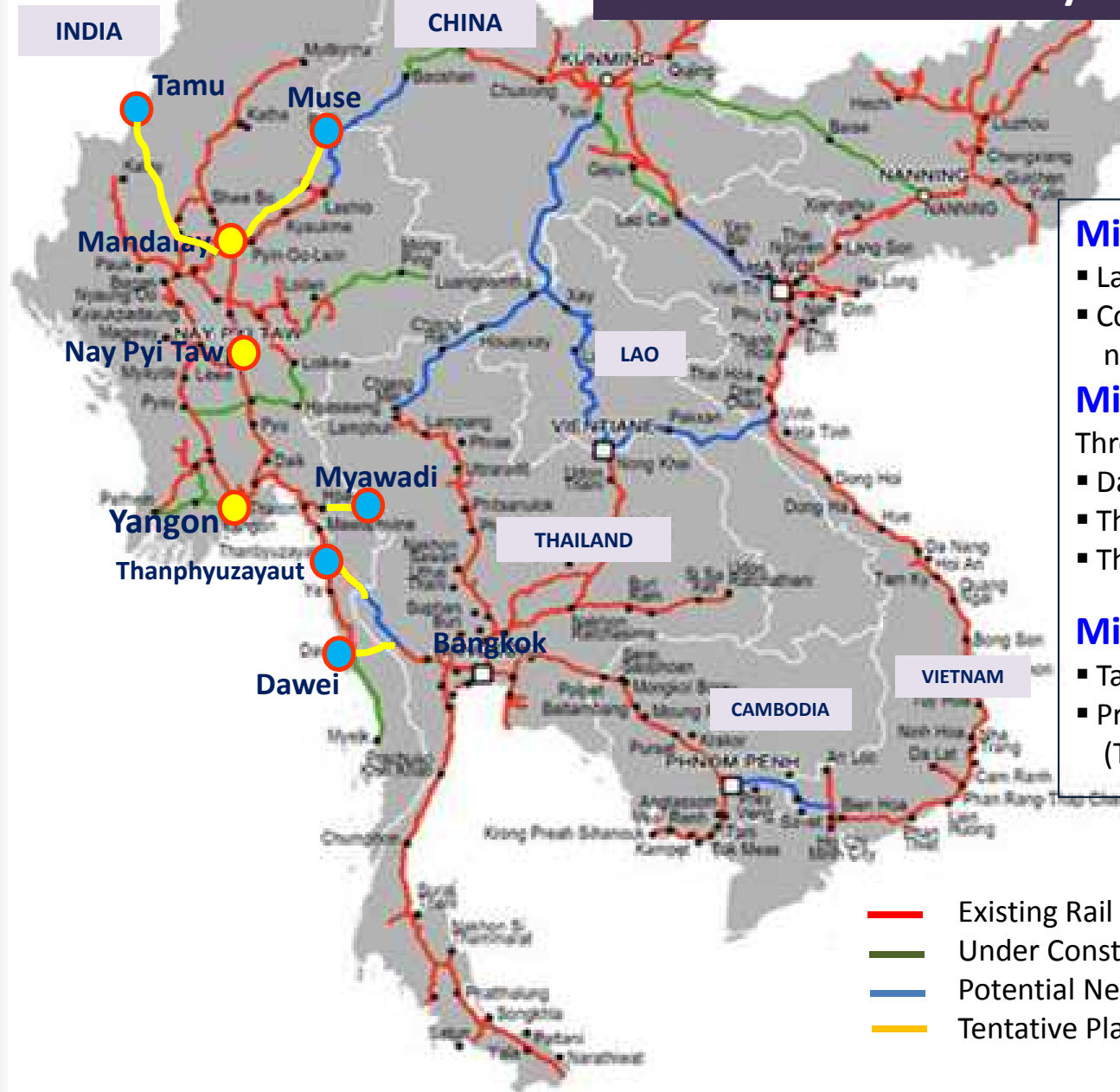
- Existing lines

Mandalay-Yangon	- 617 km
Mandalay-Lashio	- 313 km
Mandalay-Kalay	- 539 km
Bago-Thanbyuzayat	- 270 km
Total Route Length	- 6110.5 Km

- **Missing lines**

Kalay-Tamu	- 127.4 km
Lashio- Muse	- 126.1 km
Thanbyuzayat-	
Three Pagoda Pass	- 110 km

Railway Links of International Importance in Myanmar



Missing link with China

- Lashio – Muse
- Conducting F/S for Muse-Mandalay new railway line project.

Missing link with Thailand

Three Options;

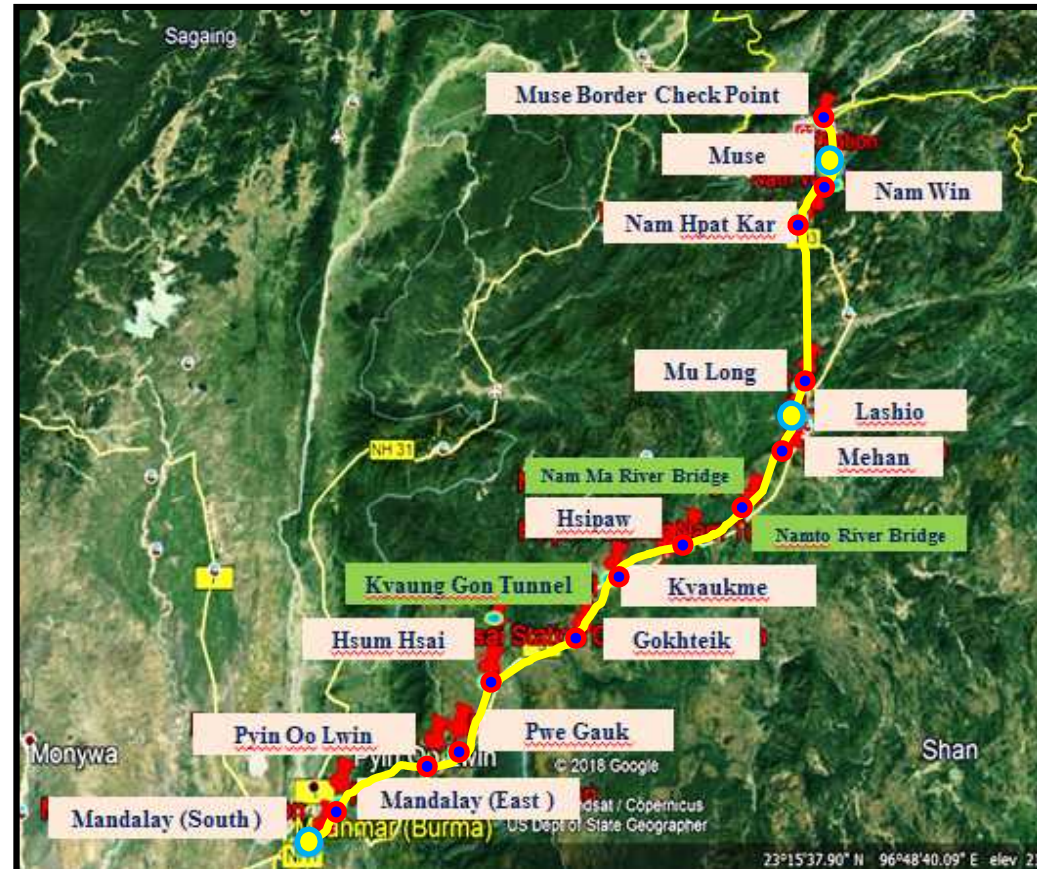
- Dawai – Kanchanaburi
- Thanbyuzayat-Three Pagoda Pass
- Thathon- Myawaddi-Mesaut

Missing link with India

- Tamu (border with India) - Kalay ,
- Proposed to conduct F/S (Tamu - Mandalay) New alignment

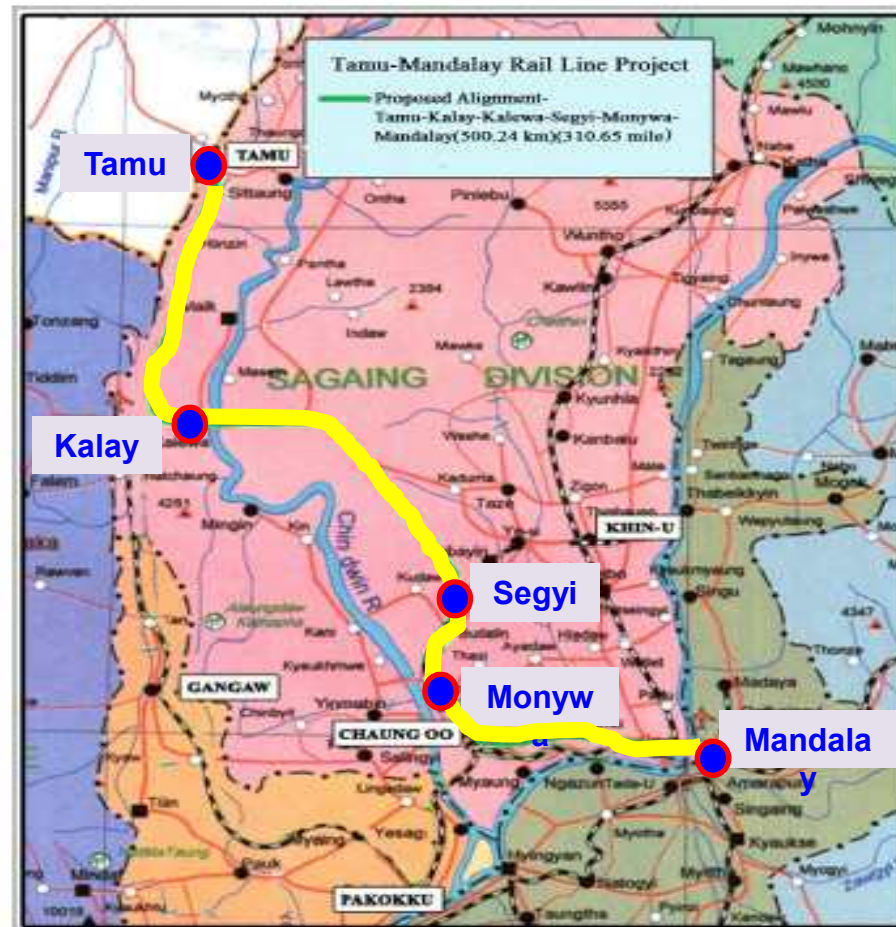
- Existing Rail Lines
- Under Construction
- Potential New Line
- Tentative Plans in Myanmar

Mandalay - Muse New Railway Line Project



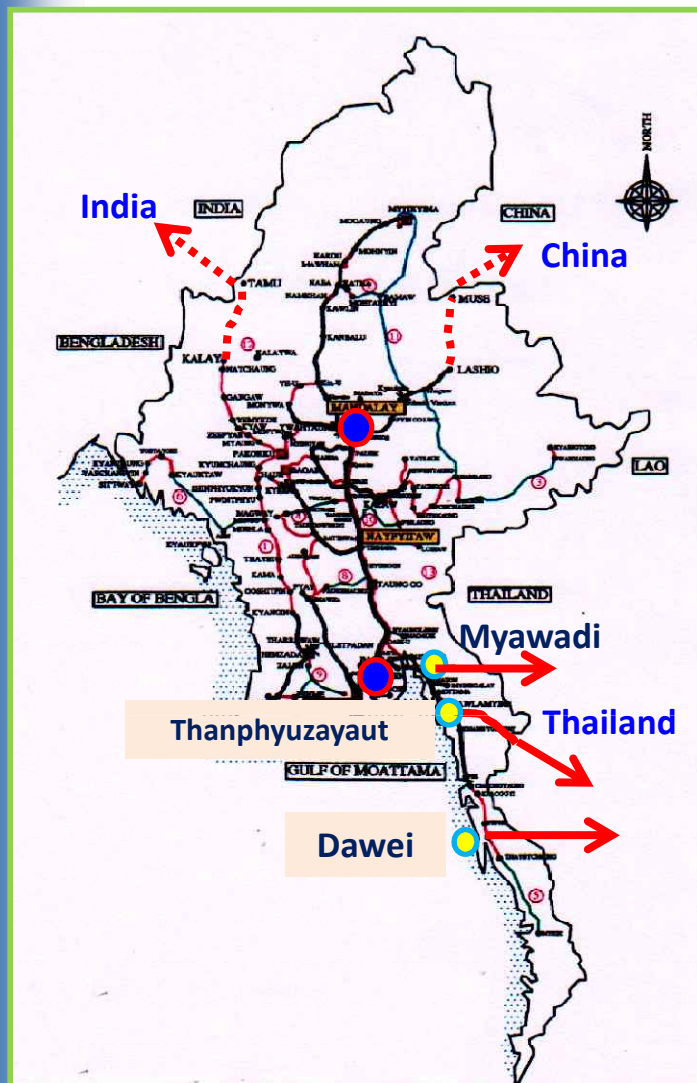
- MR and CREEC signed MoU on 22nd October, 2018.
- CREEC shall submit F/S Report within (12) months after signed MOU.
- Route Length-431 Km
- Standard Gauge, Electrified and Speed 160Km
- If the project is feasible, MR will invite ICB for Project Implementation stage.

Tamu – Mandalay New Railway Line Project



- Tamu (border with Moreh, India) - Kalay , 127 Km in Myanmar Territory.
- RITES conducted F/S at 2004-2005 estimated cost 97.68 mil USD.
- Furthermore, GoM requested to GoI to conduct F/S from Tamu to Mandalay through Monywa, Segyi Kalay with new alignment.

Myanmar - Thailand Railway Connectivity



Source: Hong Kong Trade and Development Council

- KOICA conducted F/S on Thanbyuzayat-Three Pagoda Pass (border NamTok, Thailand) - 110 km at 2005-2007.
- Three Options to choose for future possible connection;
 - Dawai – Kanchanaburi
 - Thanbyuzayat-Three Pagoda Pass
 - Thathon- Myawaddi-Mesaut



Myanmar Sustainable Development Plan (MSDP)

Myanmar Sustainable Development Plan (MSDP)

- **ECONOMIC POLICY OF THE UNION OF MYANMAR** Launched in July of 2016 that guides Myanmar's economic and social development.
- **MSDP** has been developed and founded in August, 2018 to ensure full alignment with this Economic Policy framework,.
- Expression of national development vision and MSDP provides a long-term (2018-2030) with a vision of a peaceful, prosperous and democratic country.
- **Framework;** MSDP is structured around 3 Pillars, 5 Goals, 28 Strategies and 251 Action Plans.
- All are firmly aligned with the SDGs, the 12 Point Economic Policy and various regional commitments which Myanmar has made as part of GMS Strategic Framework, AEC and many others.

MSDP Comprehensive Framework.

A Peaceful, Prosperous & Democratic Myanmar

Goal 1:

Peace, National Reconciliation, Security & Good Governance

Goal 2:

Economic Stability & Strengthened Macroeconomic Management

Goal 3:

Job Creation & Private Sector Led Growth

Goal 4:

Human Resources & Social Development for a 21st Century Society

Goal 5:

Natural Resources & the Environment for National Prosperity

Pillar 1:

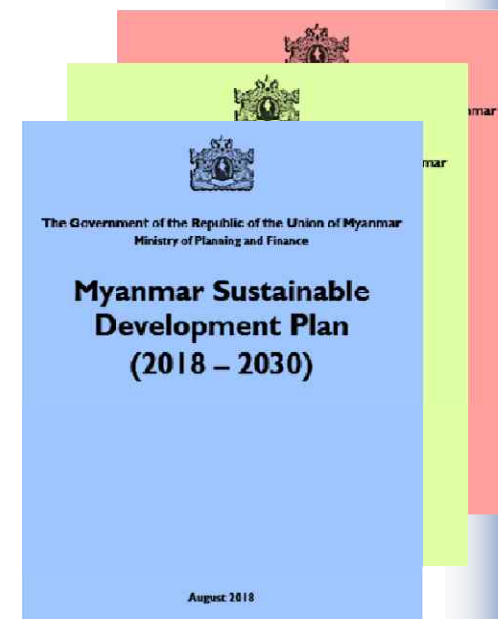
Peace & Stability

Pillar 2:

Prosperity & Partnership

Pillar 3:

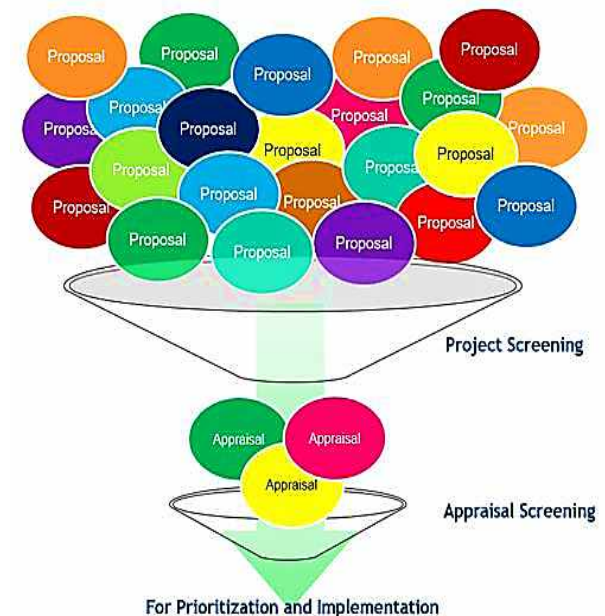
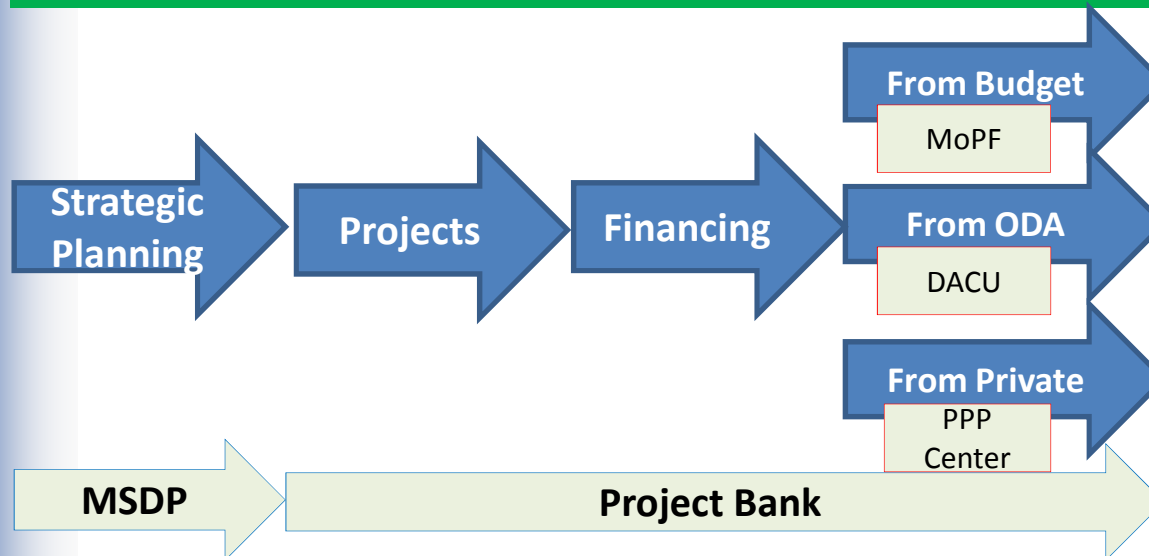
People & Planet



Myanmar Sustainable Development Plan (MSDP)

- **MSDP Implementation Unit (MSDP-IU);** MoPF shall serve as the focal entity responsible for overseeing implementation of the MSDP. MSDP-IU consist of key entities, including NECC and DACU.
- MSDP-IU will produce project screening and appraisal framework, establish the process and criteria for identifying, also provide guidance on the use of PPP, and developed the Monitoring and Evaluation (M&E) Framework will be critical.
- **Project Bank;** It means an interactive, web-based, publicly accessible database or information bank to develop to implement the MSDP in Strategic Action Plans.
- The Bank shall consist of specific development projects linked to various Action Plans which make up this MSDP.

Linkage between MSDP and Project Bank



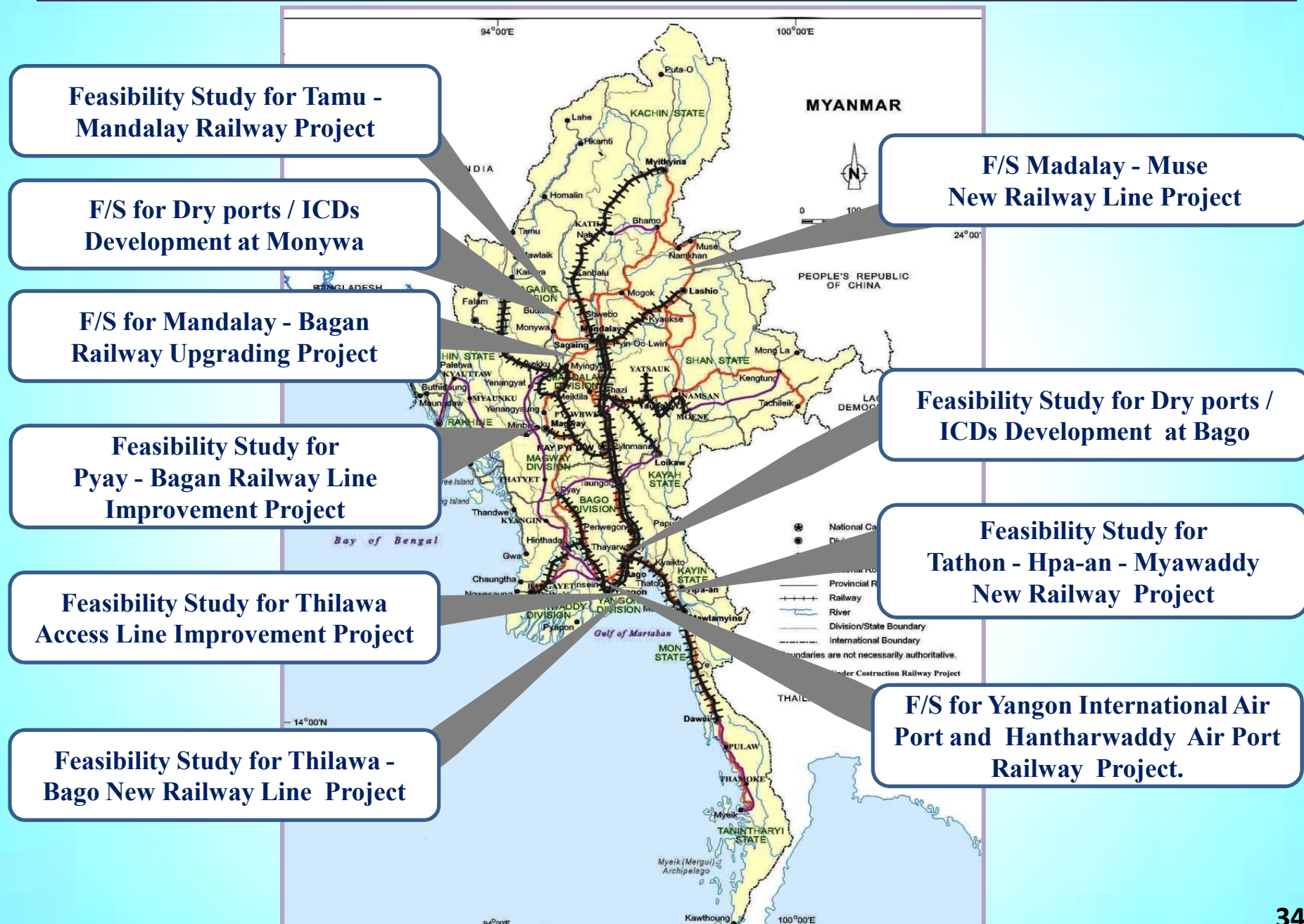
Potential Infrastructure Development Projects & Investment Opportunities in Myanmar



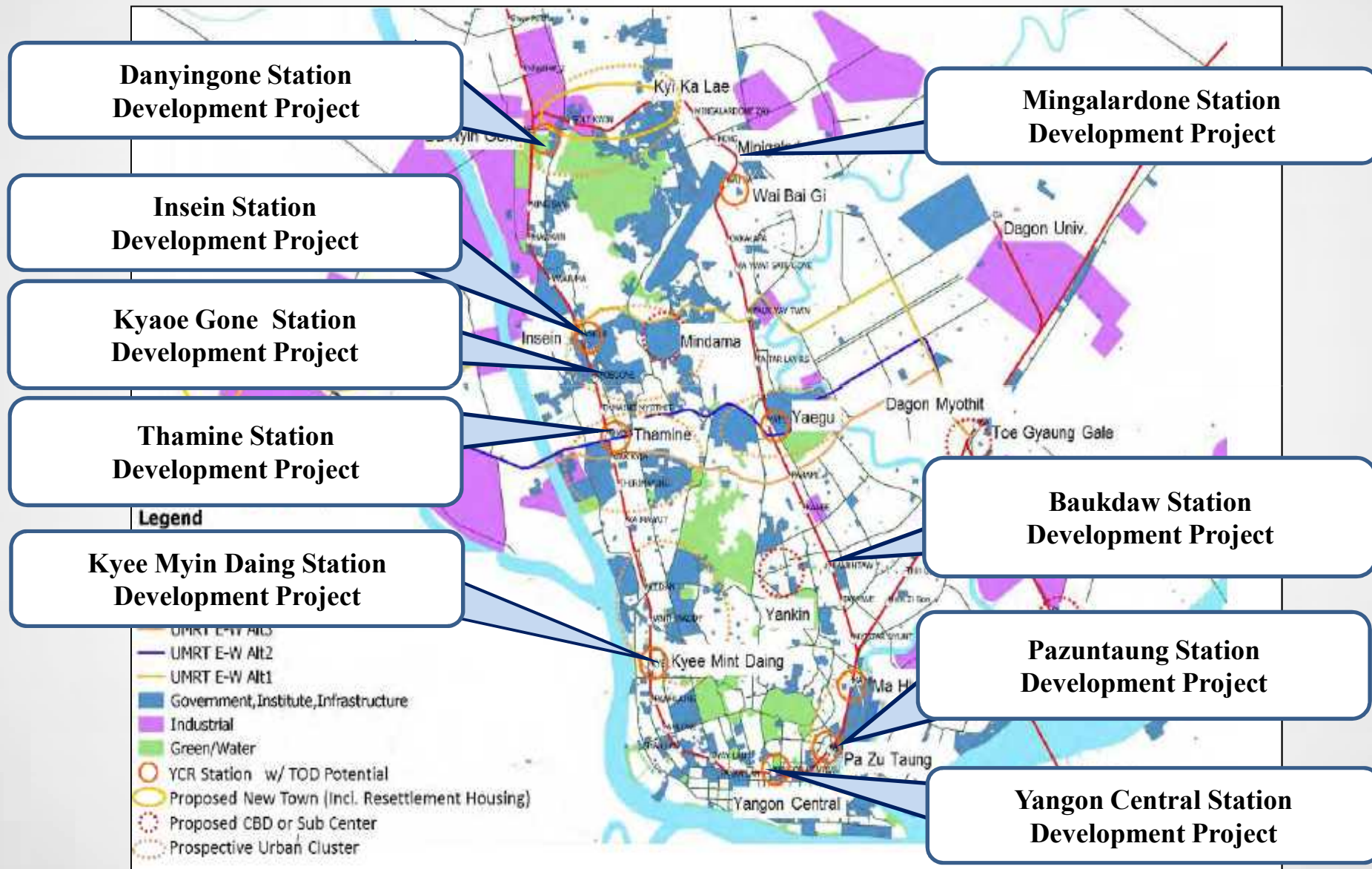
Proposed Rail Infrastructure Projects to save in Project Bank under MSDP

Potential Projects	Target Year	Financing Model
▪ Yangon-Mandalay Railway Line Improvement Project Phase I and II	2018-2025	ODA / Budget
▪ Yangon Circular Railway upgrading Project	2017-2023	ODA / Budget
▪ Rehabilitation and Modernization of Mandalay-Myitkyina Railway Project.	2019-2024	ODA / Budget
▪ Yangon-Pyay Railway Line Improvement Project	2019-2025	ODA / Budget
▪ Bago-Mawlamyine - Dawei Line Improvement Project	2017-2023	ODA / Budget
▪ Muse-Mandalay New Railway line Construction Project	2020-2026	PPP
▪ Yangon UMRT Line-1 and 2 Construction Project	2021-2030	PPP
▪ Feasibility Study for Muse - Mandalay New Railway line Construction Project	2018-2020	Grant

Proposed Rail Infrastructure Projects to save in Project Bank



Proposed Infrastructure Development Projects to save in Project Bank

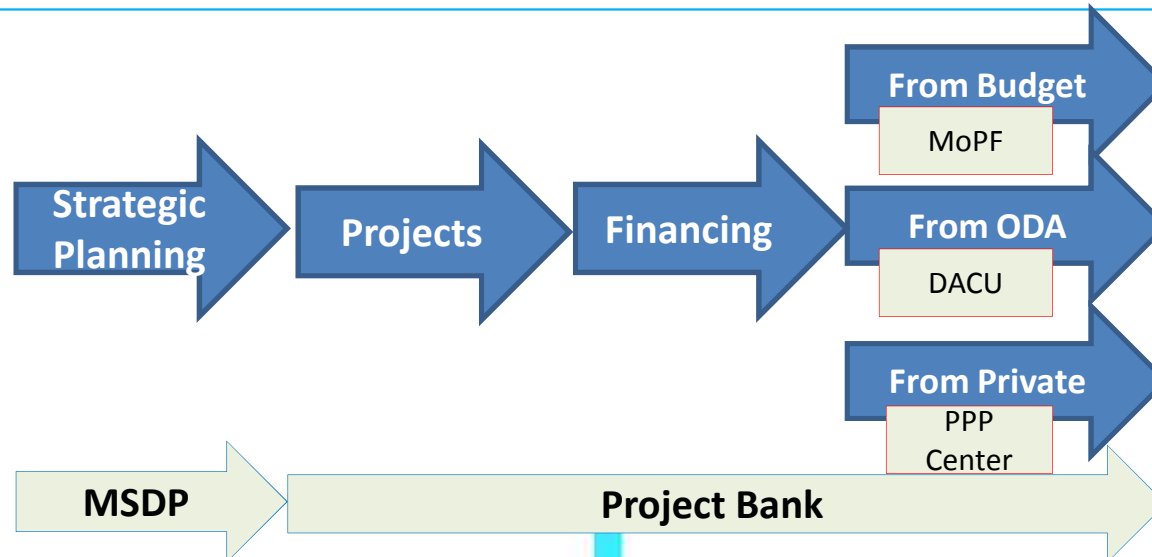


Investment Opportunities

Ways of Investment in Transport Sector

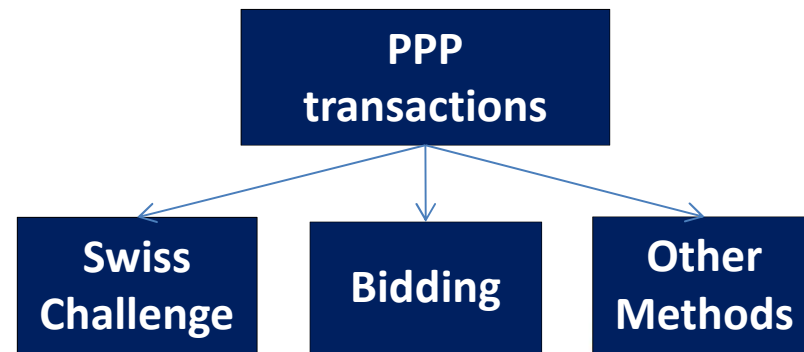
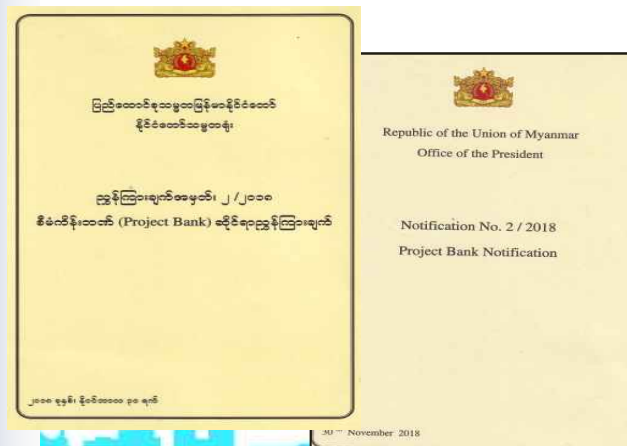
Option I - Follow the development plans and from related Government Agencies . Each agency has its own strategic development plan in line with MSDP. (Under Financing model as ODA Loan, Grant, Government Budget)

Option II - Investor has to initiate the potential areas for development and apply the proposal to related transport departments to carry out feasibility study at the potential area for the development. And, private party can submit Unsolicited PPP Proposal to the Relevant Government Agency.



Investment Opportunities

- **Notification No.2 / 2018** is issued by Office of the President in 30th Nov, 2018.
- Purposes are pro-actively attracting appropriate private partners for PPP and ensuring the competition through competitive or Swiss Challenge tender processes.
- **PPP Center** ; provide advise and support to Government agencies.
- **Unsolicited Proposals** - following information shall be contained;
 - A Project Proposal (Anticipations, Technical requirements, Schedule & Terms, Overall Plans, Financial Analysis, Risks, etc..)
 - Legal Status, Capacity, Experience of the Investor
 - Evidence of Experience implementing similar Projects



Thank for Your Kind Attentions.

Presented by;

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