



Photo 1: Socio-spatial fragmentation in HCMC: Marginal settlements in close proximity to high-rise condominium development in District 4

Photos: M. Waibel

## Ho Chi Minh City – a Mega-Urban Region in the Making

As a result of the introduction of market led reforms and the opening up to global capital, Vietnam is experiencing an economic takeoff phase. The southern metropolis of Ho Chi Minh City has largely benefited from this transitional process and is Vietnam's main engine of innovation, economic growth, and globalisation. Subsequently it has developed into Vietnam's first mega-urban region.

Many phenomena of this mega-urban development, such as the inclusion of non-state actors in urban development projects, resemble those found in other metropolises in Southeast and East Asia (Laquian 2005). Among the major drivers for the spatial spill-over of urban growth to the adjacent provinces have been, in equal measure, the erection of numerous industrial zones in the urban periphery as a consequence of the adoption of an export oriented industrialization strategy, massive inflows of migrants mostly from

rural areas and suburbanization processes of the urban middle classes.

Like other mega-urban agglomerations of the region, Ho Chi Minh City (HCMC) is suffering from problems such as environmental degradation, air and water pollution, insufficient governmental capacities to cope with the fast growth, migration pressure and increasing socio-spatial fragmentation (Photo 1). In the regional as well as in the structural context, the urban development pattern of HCMC can best be compared to that of China. China is also experiencing a gradual

transition from a command economy towards a more pluralistic market economy under perpetuation of the one-party rule of the Communist Party. As in China the commodification of urban development through several legal reforms allowing land use rights to be traded led to a transfer of state resources to private hands and, consequently, to a marketization of housing and real estate.

Also the dynamics of economic development are comparable. In the past two decades, China and Vietnam had the highest growth rates worldwide though China is economically still further advanced than Vietnam. Among others this is reflected in the urbanization rate which is considered a major indicator of modernization. In China the share of urban population is considerably higher (44 %) than in Vietnam (29 %; GSO 2008, p. 40). Both figures tend to underestimate the actual degree of urbanization because Vietnam as well as China use an administrative definition of the term “urban”. Administrative adjustments generally lag behind real life development.

A further similarity is the implementation of public-private-partnership models especially in the case of large comprehensive urban development projects. By including non-state actors, the municipal authorities aim at compensating for the lack of governability and of know-how, institutional fragmentation and most of all for the shortage of capital. This tendency towards the privatization of urban development has become a common, and often heavily criticized, feature not only in China or Vietnam but also in other mega-urban regions worldwide (*Douglass and Huang 2007*). However it seems that the degree of state control within these projects is considerably higher in Vietnam or in China than in most other developing countries. Often it is the implementation of governance processes that makes urban development possible at all. But this process also brings with it the danger of increasing socio-spatial

fragmentation and of serving the urban elites only.

## Population development and spatial expansion

Looking at the population development of HCMC and its neighbouring provinces, which together form the so-called “Southern Key Economic Region” as defined by the national government, a massive increase can be observed. The population has risen from 10.9 million inhabitants in 1990 to 15.6 million in 2007 (*Figure 1*). This population is not concentrated completely within the functional area of the mega-urban region, as can be easily deduced from the population densities of the administrative entities of the Southern Key Economic Region (*Figure 2*). However it is estimated that the mega-urban region of HCMC easily exceeds the threshold of 10 million inhabitants which makes it a mega-city according to the definition of the United Nations (*Laquian 2005*, p. 3). In fact the population of the mega-urban region of HCMC is much higher than the official figures suggest because the overwhelming majority of the labour migrants are usually not included

into the official urban population statistics. It is estimated that approximately 2 million migrants are living in HCMC and the adjacent provinces as temporary residents or commuters.

Within the administrative borders of HCMC, the population experienced a rise of more than 53 % from 4.14 million permanent residents in 1990 to 6.65 million permanent residents in 2007 (*Figure 1*). The population of HCMC has mainly increased within the suburban districts where a predominantly uncontrolled urban sprawl has developed. As a consequence the settlement area has more than doubled. From 1999 to 2007 alone, the suburban districts like District 12 (+96 %), District 7 (+78 %), District Thu Duc (+75 %), or District Go Vap (+66 %) registered the highest rates of population growth within the municipality of HCMC (*Waibel et al. 2007*, p. 61; Statistical Office of HCMC 2008, p. 23; *Figure 2*). The highest population growth of the adjacent provinces has been registered in Binh Duong Province (+43 %) in the same period of time (GSO 2008, p. 38).

In contrast to the situation in the 1980s and 1990s when many migrants from the countryside

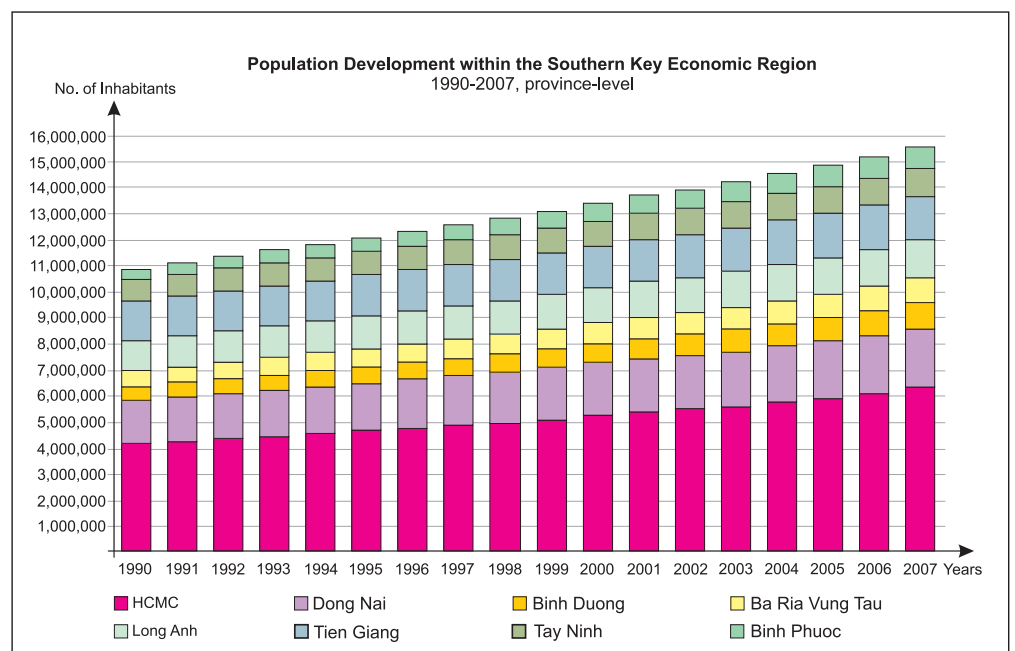


Figure 1: Population Development of the Southern Key Economic Region of Vietnam

Data: Statistical Yearbook of Vietnam  
Editor: M. Waibel

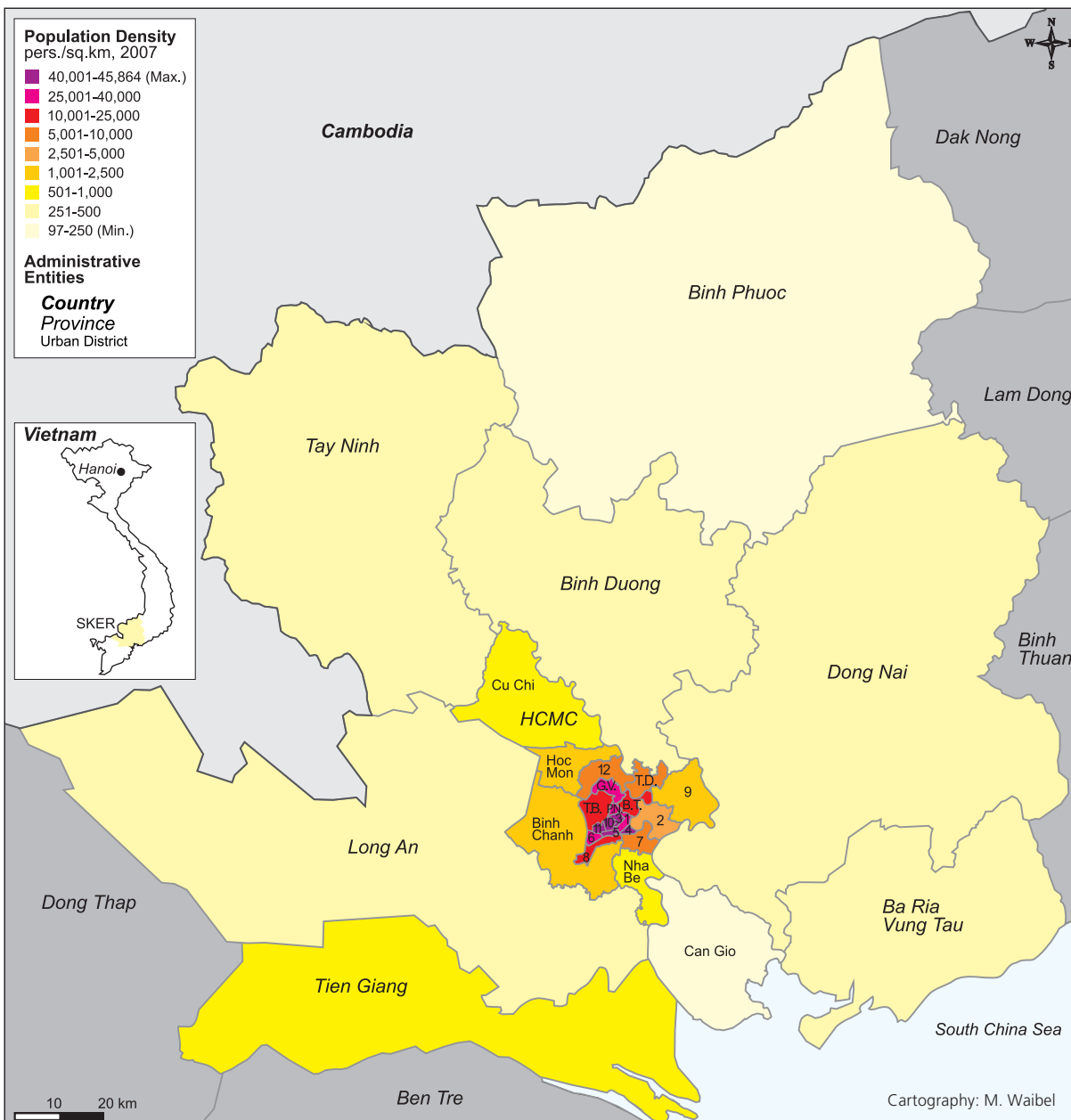


Figure 2: Overview and population density of the Southern Key Economic Region of Vietnam

Data: Statistical Yearbook of Vietnam 2007, Statistical Yearbook of HCMC 2007



Photo 2: Female labour migrants from northern Vietnam living within a boarding house unit of Son Thang Industrial Park in Binh Duong province

moved to inner city locations to find work in the informal sector, rural-urban migrant flows now target the sub- and peri-urban areas of HCMC. This spatial shift of demographic growth is closely linked to the emergence of new employment opportunities for unskilled labourers in the mushrooming industrial zones and industrial parks.

### Development of industrial zones

As of July 2008 Vietnam has been able to attract a total of US\$ 130.63 billion of foreign direct

investments of which 29.32 billion have already been disbursed (Vietnam Economic Association 2008, p. 60). The country's accession to the World Trade Organisation (WTO) in January 2007 led to a massive surge of foreign direct investments. The most important foreign investors come from Japan and the four first-generation tiger economies of Taiwan, Singapore, South Korea, and Hong Kong. Following the famous flying geese regional economic development model, the latter countries have outsourced labour-intensive industrial production to Vietnam. It has also been very common for the often semi-state economic development agencies of these countries to transfer the successful institutional models of their own past takeoff phase to that of contemporary Vietnam (Waibel and Jordan 2005).

In Vietnam the development of industrial parks and export processing zones has been a crucial move to implement the strategy of export led industrialization and to channel foreign direct investments in Vietnam. Like in the tiger economies of the first generation, public-private companies or special purpose associations are responsible for the management of the industrial zones. In HCMC for example the Ho Chi Minh City Export Processing and Industrial Zone Authority (HEPZA) was founded as special purpose association with responsibility for managing export processing zones and industrial zones. In this zone preferential tax incentives are granted, bureaucratic matters are simplified by means of a one-door service and infrastructural equipment is exceptional. About 900,000 people are currently working in these zones all over Vietnam, most of them young women from rural areas (Photo 2). So far the industry in these areas consists mostly of labor-intensive production such as garment making and textile manufacturing.

The first export processing zone of Vietnam was established in HCMC in 1991. In a move that is typical for the transitional process

**Table 1: Industrial zones and regional disparities in Vietnam**

|                            | Number of industrial zones in % | Area Size in %   | Foreign Direct Investment in % | Domestic Investment in %    | Number of labourers in % |
|----------------------------|---------------------------------|------------------|--------------------------------|-----------------------------|--------------------------|
| Southern Key Economic Zone | 47.8                            | 60.5             | 78.7                           | 58.3                        | 64.3                     |
| HCMC                       | 13.3                            | 9.9              | 10.3                           | 15.9                        | 21.5                     |
| Northern Key Economic Zone | 14.4                            | 14.9             | 15.0                           | 13.2                        | 12.9                     |
| Hanoi                      | 4.4                             | 2.1              | 7.2                            | 0.1                         | 2.1                      |
| Central Key Economic Zone  | 8.9                             | 9.8              | 3.2                            | 11.8                        | 6.8                      |
| Other                      | 11.1                            | 14.8             | 3.1                            | 16.7                        | 16.0                     |
| <b>Absolte number</b>      | <b>90</b>                       | <b>13,462 ha</b> | <b>US\$ 19,535 million</b>     | <b>VND* 112,194 billion</b> | <b>896,239</b>           |

\* Vietnamese Dong: 1,000,000 VND = 605 US\$ (Oct. 2008)

SKER, Southern Key Economic Region: Ho Chi Minh City, Binh Duong, Ba Ria-Vung Tau, Dong Nai, Long An, Binh Phuoc, Tay Ninh

NKER, Northern Key Economic Region Hanoi, Hai Phong, Quang Ninh, Hai Duong, Hung Yen, Ha Tay, Vinh Phuc, Bac Ninh

CKEZ, Central Vietnam Key Economic Region: Da Nang City, Thua Thien-Hue, Quang Nam, Quang Ngai, Binh Din

Data Source: own calculations based on: Vietnam Economic Association (ed.) (2007), pp. 60 f.

in Vietnam, this zone was opened up by the municipal authorities before the national government passed the respective law (Waibel 2003). This procedure is therefore typical because by the introduction of a new economic policy the municipal government of Ho Chi Minh acted as engine of innovation without waiting for approval from the national level. Also characteristically in this case, the implementation of the Tan Thuan export processing zone was realized through a joint venture company. The international partner was the Taiwanese corporation Central Trading & Development Group, owned by the then ruling Kuomintang Party. This company had already collected a great deal of experience in the operation of export processing zones in its home country. The domestic partner was a company under control of the People's Committee of HCMC. This institutional setting allowed the municipal administration to exert further control over economic development and to get direct financial benefits. So far, the number of export processing and industrial zones in Vietnam has risen to 90 with 26 more currently under

construction (Vietnam Economic Association 2008, p. 60).

The Southern Key Economic Region has been especially successful in the operation of industrial zones. It includes about half of all industrial zones of Vietnam which channel about 80 % of all foreign direct investments implemented there (Table 1). Apart from HCMC the eastern adjacent provinces of Binh Duong, Dong Nai, and Ba Ria-Vung Tau have been especially successful in attracting global capital. These provinces now increasingly serve as the industrial backyard of the metropolis of HCMC. In the Song Than Industrial Park of Binh Duong province for example (Photo 3), 77,500 labourers have found employment. A total of US\$ 847 million in foreign direct investments has been implemented there (Economic Association 2007, p 60). Though HCMC, Binh Duong, Dong Nai and Ba Ria-Vung Tau province together are home to only 11.5 % of Vietnam's population, they have a share of 46.8 % of all foreign direct investments disbursed in Vietnam as of July 2008 (Figure 3). While the industrial zones and industrial parks usually offer outstanding infra-

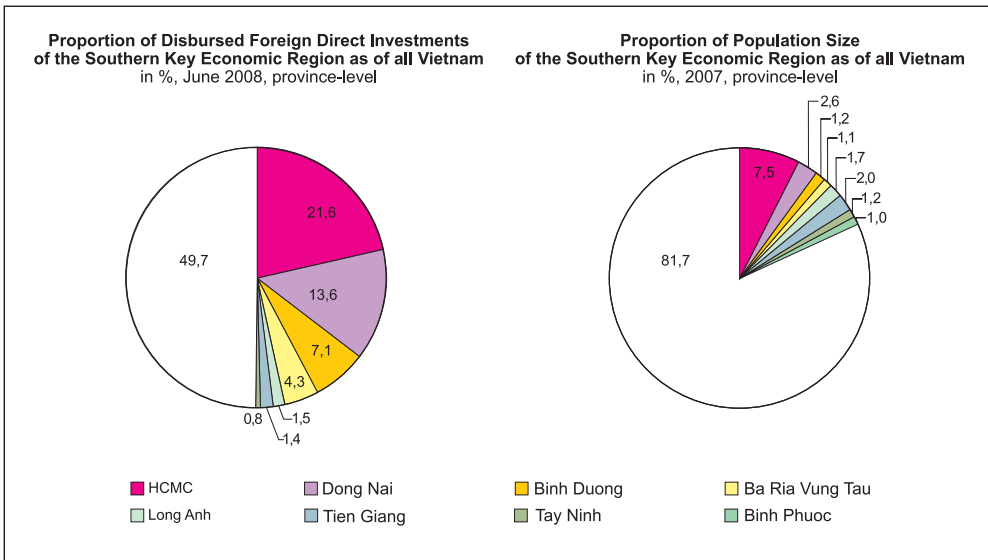


Figure 3: Role of the Southern Key Economic Region of Vietnam in the national context

Data: Statistical Yearbook of Vietnam 2007; Vietnam Economic Times, 8/2008  
 Editor: M. Waibel



Photo 3: Entrance Gate of Song Than Industrial Park in Binh Duong province



Photo 4: Large boarding house agglomeration close to Song Than Industrial Park in Binh Duong province

structure, they were designed without a coherent effort to provide housing opportunities for factory workers.

### New slums in the urban periphery

In the course of the transitional process, the Vietnamese state has almost completely withdrawn from the role of supplying housing and has left the matter of accommodation provision to market forces. The commodification of land and housing led to astronomical prices in the real estate sector. The land price-income ratio in Vietnam has become one of the highest in the world. This situation is most problematic for labour migrants who only have low incomes at their disposal. As the establishment of industrial zones was usually not accompanied by the provision of housing for labour migrants, most of these people moved to spontaneously erected tenant house agglomerations in direct proximity to their workplace. In Vietnam this kind of accommodation is called boarding house. Boarding houses are rented and multi-shared small housing units. The dominant boarding house typology consists of long row houses with small one-room units (Photo 4). In many cases the boarding houses are considered overpriced.

To save money up to six migrants share the small housing units of just 8 to 10 m<sup>2</sup>. The boarding house units often lack technical infrastructure and connection to public transport. Rampant theft, drug abuse and prostitution are among the particular problems arising in the large boarding house conglomerations. This has resulted in precarious living conditions for the inhabitants and in environmental problems for the city at large. A survey of 50 boarding house inhabitants in District 12 in the year 2006 by the author showed that the highest individual priorities for improvement of the current living situation have been a better provision of technical



Photo 5: Showroom for the luxury car brand Porsche under construction in Saigon South

infrastructure in terms of housing, especially toilets, sanitation, and water supply (*Waibel and Gravert 2007*). A leading official from the National Ministry of Construction recently described the boarding house agglomerations in the outskirts of HCMC as “new slums” (*Do Tu Lan 2006*).

The physiognomy of the boarding house areas is in sharp contrast to the comprehensive housing projects that target the rapidly emerging upper middle classes and that are also constructed in the urban periphery. Often these clearly delineated islands of prosperity seem like spatially isolated implantations in the urban fabric (*Kraas 2004*, p. 39). All this contributes to a rising social-spatial fragmentation of the mega-urban region of HCMC.

### New urban areas and suburbanization

The transition of Vietnamese urban society has also led to increasing social differentiation in terms of income, education, family size, consumption patterns, etc., to produce hitherto unknown class divisions (*Waibel 2006*, p. 44). As a result of the economic boom,

the urban middle classes of HCMC have increased dramatically. According the market research company TNS, the number of households with a disposable income of 251 to 500 US\$ per month has increased from 31 % to 55 % between 1999 and 2006. The number of households that have an income of more than US\$ 500 even tripled to 21 % in the same time period (*Waibel 2008*, p. 11).

The “nouveaux riches” have become an important target group for international and domestic property developers. As in the context of industrial zone development, new urban areas are often erected through the implementation of public-private partnership models. This is especially true for large new urban areas in the urban periphery that display a conceptually coherent functionality and where housing and respective infrastructure are being developed in a co-ordinated fashion. The development of the Saigon South new urban area is a very illustrative example for this.

Saigon South represents a huge city extension project just 4 km south of the central District No. 1 of HCMC. Saigon South is a functionally mixed urban develop-

ment covering 3,300 hectares of former wetlands. Within this area residential and commercial quarters alternate with educational centres (e.g., the first completely foreign-owned university in Vietnam, the Australian RMIT International University), health facilities and leisure facilities, such as a golf course and tennis courts. Several gated communities have been established there. A huge exhibition and convention centre is currently under construction as well as large shopping malls and the first showroom of the luxury



Photo 6: High-rise condominium developments in Saigon South

car brand Porsche in Vietnam (*Photo 5*). The housing typologies are dominated by high rise condominium developments (*Photo 6*), detached villas, and row houses of neo-classical and eclecticist architecture (*Photo 7*). The price for housing there makes the area an exclusive destination for the beneficiaries of the transition – the upper middle classes.

Its projected population in the year 2020 will be between 500,000 and 1,000,000 residents (*Waibel 2004*). So far about

processes. Among others this also contributes to a de-densification of the core city areas.

### Restructuring of the Core City areas

The core city areas experienced processes of tertiarisation and the development of a Central Business District. The skyline increasingly resembles those of other South-east and East Asian metropolises (*Photo 8*). The most important actors in this context

are trans-national companies that erect office and hotel spaces, set up their local headquarters and more recently erect huge shopping malls. Vietnamese companies and household enterprises have also set up shops in large numbers in the inner city areas. The variety of restaurants, bars and exclusive retail stores featuring global luxury labels has rapidly increased (*Photo 9*). The internationalisation of retailing will further increase since the entry to the World Trade Organisation will result in successive loosening of the market entry barriers for international companies.

As a whole the core city areas are characterized by a massive conversion of living space into commercial space. This has resulted in a loss of population there. From 1989 until 2007 the population has substantially decreased within the inner city District 1 (-20%), the adjacent District 3 (-16%) and the District 5 (-16%), the old Chinese quarter (NIURP 1994, p. 19; Statistical Office of HCMC 2008, p. 23). Furthermore migrants living in marginal settlements along the many canals of the central parts of the city are increasingly being evicted due to urban upgrading programs implemented by international donors like the World Bank or the Japan Bank for International Cooperation.

In the city centre the competition for space is immense, and therefore land and lease prices are



Photo 7: Homogeneous architecture for the nouveaux riches of a gated community in Saigon South

200,000 people have moved there. This project is being realized by a joint-venture company established by the Taiwanese corporation Central Trading & Development Group (CT&D) and a subsidiary company of the Peoples' Committee of HCMC. The Taiwanese corporation is the one that, several years ago, won permission to erect the first export processing zone in Vietnam.

Saigon South is exclusively serving the housing needs of the urban rich. It increased spatial segregation and leads to socially highly selective suburbanization



Photo 8: Skyline of the city-centre of Ho Chi Minh City

skyrocketing. To relieve development pressure on the historic city which still contains some fine examples of French colonial architecture, the urban planners have decided to set up a new central business district opposite the Saigon River on the peninsula of Thu Thiem in District 2. This project is modelled on the successful development of the Pudong new urban area of Shanghai. The projected area covers 737 hectares, and the future population size is aimed at 130,000. As is typical for the urban development process in Vietnam, the project is being implemented by a special purpose association, the so-called Thu Thiem New Urban Center Management Authority.

However the progress of this ambitious project has been rather slow so far. It has mainly consisted of the erection of traffic infrastructure and site clearance. Still several tens of thousands of mostly low-income people need to be relocated to create space for commercial development. After long delays the completion of a tunnel connecting the old city centre with the prospected new one is now expected for the first half of 2009. This will certainly accelerate the development there.

In June 2008 the municipal authorities were already able to announce the first large investment project in Thu Thiem: Three Taiwanese companies are planning to erect a software park there together with a Vietnamese telecommunication company. This also indicates an economic restructuring process that will be of increasing importance for the further development of the mega-urban region of HCMC.

### Economic restructuring

Flows of Foreign Direct Investments (FDI) have recently shown strong signs of tertiarisation. A look at the sectoral structure of cumulated foreign capital that the metropolis received between 1988 and 2006 reveals that most of the money (US\$ 5.7 billion) has been invested in the real estate and



Photo 9: Retail outlet of the luxury brand Louis Vuitton in the main shopping street of Ho Chi Minh City

property sector. This is followed by the industrial sector (US\$ 5.2 billion) and, in the third place, by the services sector (US\$ 3.0 billion; DPI 2008). The municipal administration of HCMC has realized that further growth will be only possible by targeting companies from the knowledge-based sector. Therefore economic restructuring away from labour-intensive industry towards higher-value-added industrial products and high end services is actively promoted and also heavily subsidized. In the past years several high-tech parks have been erected in the metropolis, such as Saigon Software Park, Quang Trung Software City or the so-called e.town campus.

In order to be able to offer adequately qualified human resources for the demands of the knowledge-based industry, the municipal government has recently intensified its efforts in the field of higher education. In June 2008 for example, the People's Committee of HCMC authorized one of the biggest single investments in the history of the metropolis. A joint-venture enterprise led by the Malaysian company Berjaya Leijaya will erect the Vietnam International University

Township on a 925-hectare land plot in Hoc Mon District with a total investment volume of about US\$ 3.5 billion (MOFA 2008). As early as 2006 it was announced that the American chip manufacturer Intel will set up a factory in the neighbouring province of Ba Ria-Vung Tau with a total investment volume of more than US\$ 600 million (MOF 2006). This indicates that the economic restructuring process has already spread across the administrative borders of HCMC.

Most recently it has been announced that textile companies have started to relocate their production sites from HCMC to Cambodia because the labour costs there are considerably cheaper. The incipient outsourcing process of labour-intensive production and the focus on higher-valued-added industry seems to confirm that the flying goose model of regional development is taking effect in the case of Vietnam too. Similar processes took place in the Pearl River Delta of China for example when the income level reached a certain level so that some labour-intense production source out to Vietnam, among others. All of these indicators show that the economic



restructuring process within the mega-urban region of HCMC is fully under way.

### Conclusions and outlook

In the course of the transitional process, the metropolis of HCMC has experienced an enormous economic and demographic growth and has consequently developed into a mega-urban region. Still the municipality of HCMC is the undisputable economic and functional core of this mega-urban region. It can be considered to be a mono-centric mega-urban region that may be compared to the Chinese metropolis of Shanghai and its hinterland in the Yangtze Delta. Within the next decade the functional dominance of HCMC will probably decrease. Against fierce resistance from the municipal government of HCMC, the national government has decided that the new international airport for this mega-urban region will be erected in the province of Dong Nai. Furthermore it has announced that a new huge harbour will be erected in the province of Ba Ria – Vung Tau which is to serve as the main trans-shipment centre for the Southern Key Economic Region.

In the national context the economic supremacy of the Southern Key Economic Region over the Northern and Central Key Economic Regions is still striking. However it has decreased slightly in the past five years (Waibel and Jordan 2005). The biggest challenge for a sustainable future development of the mega-urban region of HCMC will be to achieve better regional coordination. So far major deficiencies in this field remain. Regional development coordination efforts can easily be undermined by the immense competition between the different administrative entities and especially between the different economic development agencies. Legally speaking the Southern Institute of Urban Planning (SIUP South) is responsible for a spatially coherent development of the Southern Key Economic Region. But this authority, established by the National

Ministry of Construction in Hanoi, must overcome problems of acceptance by the local governments. It also lacks implementation power due to institutional deficiencies (Waibel, forthcoming 2009).

New innovative forms of metropolitan governance are therefore urgently needed. The current economic restructuring process towards knowledge-based industries may promote opportunities for joint initiatives by the administrative entities. The international companies of the knowledge sector usually insist strongly on a healthy and clean environment. The reduction of pollution within the mega-urban region of Ho Chi Minh City will only be possible if the administrative entities cooperate closely in specific infrastructural fields, such as water or waste management. The foundation of special purpose associations dealing with those kinds of regional problems could be a first step towards promoting regional integration and establishing win-win situations. In the long run such cooperation schemes may also be the basis for joint attempts to tackle the extremely high socio-spatial fragmentation of the first mega-urban region of Vietnam. ■

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