Myanmar Transport Infrastructure and Logistics Development
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Formal name: Republic of the Union of Myanmar

Myanmar lies between Lat. 9° 32’ and 28° 31’N and Long. 92° 10’ and 101° 11’E

Total land area: 676,578 sq km
Total length:
(South to North): 2,100 km
(East to West): 925 km
Navigable length: 6650 km
Total land boundaries: 5,867 km
Total length of coastline: 2,832 km
Cities: Naypyitaw, Yangon, Mandalay
Official language: Myanmar
Economy: Agro-based
Main rivers: Ayeyarwaddy, Chindwin, Sittaung, Thanlwin
Neighbours: China, Lao PDR, Thailand, Bangladesh, India
Transport Administration

- Ministry of Construction
  construction and maintenance of national roads and bridges;

- Ministry of Rail Transport
  land and rail transport;

- Ministry of Transport
  marine and air transport;

- Urban Transport

  - Naypyitaw Development Committee
  - Yangon City Development Committee
  - Mandalay City Development Committee

The Ministry of Border Affairs
for construction and maintenance of roads and bridges in border areas
ORGANIZATION CHART OF MINISTRY OF TRANSPORT

Aviation Sector
- Department of Civil Aviation
  - Myanmar Airways

Department of Transport
- Department of Marine Administration
  - Myanmar Port Authority
    - Inland Water Transport
      - Myanmar Shipyards
        - Directorate of Water Resources and Improvement of River System
          - Department of Metrology and Hydrology

Maritime Sector
- Myanmar Maritime University
  - Myanmar Mercantile Marine College
Myanmar is presently using 33 airports out of its 69 airports. Of these, 3 are opened as international airports while the others are used as domestic airports.

**International Airports**

- Yangon International Airport  
  (passenger handling capability- 2.7 million)
- Mandalay International Airport  
  (passenger handling capability- 3 million)
- Naypyitaw International Airport  
  (passenger handling capability- 3.5 million)

**Domestic Airports**

- 30 Domestic Airports (some airports are serving int’l charter operations)
Today Myanmar has

- 7 domestic airlines… Myanmar Airways, Yangon Airways, Air Mandalay, Air Bagan, Asian Wings Airways, Air KBZ and Golden Myanmar, which are operating twenty-seven domestic destinations with F 28, F 100, ATR 72, ATR 42, MA 60 and Embraer 190 aircrafts.

- 1 international airline … Myanmar Airways International, which is operating international scheduled services per week between Myanmar and seven regional destinations with A 320 aircrafts.
### International routes which are being operated by foreign airlines

<table>
<thead>
<tr>
<th>Foreign Airlines</th>
<th>Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thai Airways International, Bangkok Airways, Thai Airasia</td>
<td>Bangkok-Yangon</td>
</tr>
<tr>
<td>Malaysia Airlines &amp; AirAsia Berhad</td>
<td>Kuala Lumpur-Yangon</td>
</tr>
<tr>
<td>Silk Air, JetStar Airways &amp; Singapore</td>
<td>Singapore-Yangon</td>
</tr>
<tr>
<td>Air China &amp; China Eastern Airlines</td>
<td>Kunming-Yangon</td>
</tr>
<tr>
<td>China Eastern Airlines</td>
<td>Kunming-Mandalay</td>
</tr>
<tr>
<td>China Southern Airlines</td>
<td>Guangzhou-Yangon</td>
</tr>
<tr>
<td>China Airlines</td>
<td>Taipei-Yangon</td>
</tr>
<tr>
<td>Vietnam Airlines</td>
<td>Ha Noi-Yangon</td>
</tr>
<tr>
<td>Air India</td>
<td>Kolkata-Yangon</td>
</tr>
<tr>
<td>Korean Airline</td>
<td>Inchon-Yangon</td>
</tr>
<tr>
<td>Eva Air</td>
<td>Taipei-Yangon</td>
</tr>
<tr>
<td>Qatar Airways</td>
<td>Dohar-Yangon</td>
</tr>
</tbody>
</table>
## Passenger Traffic in Yangon International Airport

<table>
<thead>
<tr>
<th>Sr.</th>
<th>Year</th>
<th>International Pax</th>
<th>Domestic Pax</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2003</td>
<td>548202</td>
<td>603774</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2004</td>
<td>670008</td>
<td>665630</td>
<td>10%</td>
</tr>
<tr>
<td>3</td>
<td>2005</td>
<td>725858</td>
<td>699209</td>
<td>5%</td>
</tr>
<tr>
<td>4</td>
<td>2006</td>
<td>825236</td>
<td>748600</td>
<td>7%</td>
</tr>
<tr>
<td>5</td>
<td>2007</td>
<td>867853</td>
<td>755200</td>
<td>1%</td>
</tr>
<tr>
<td>6</td>
<td>2008</td>
<td>824595</td>
<td>654979</td>
<td>(-)13%</td>
</tr>
<tr>
<td>7</td>
<td>2009</td>
<td>967622</td>
<td>659607</td>
<td>1%</td>
</tr>
<tr>
<td>8</td>
<td>2010</td>
<td>1211372</td>
<td>778433</td>
<td>18%</td>
</tr>
<tr>
<td>9</td>
<td>2011</td>
<td>1448729</td>
<td>998616</td>
<td>28%</td>
</tr>
<tr>
<td>10</td>
<td>2012</td>
<td>1925762</td>
<td>1139654</td>
<td>14%</td>
</tr>
</tbody>
</table>

Source – DCA (2012)
Passenger Traffic (cont’d)

(Yangon International Airport)

- The Total inbound and outbound international passengers in 2012 increased 32.9% on that of 2011

- The Total inbound and outbound domestic passengers in 2012 increased 14.12% on that of 2011

- Passenger traffic at the airport has been growing year on year with the annual growth rate of 20.12% 

- It is forecasted that passenger traffic will be 5.4 million in 2015
Yangon Port

Yangon Port is the river port and premier port of Myanmar which handles about 90% of seaborne trade of the country.
International Wharves

International wharves

- Yangon Port - 18 wharves
- Thilawa Port - 6 wharves

Total - 24 wharves
ICD - 3 Depots
There are also 8 other coastal ports known as Out ports along the coast.

To cope with the growth of the maritime trade volume after adoption of the market oriented economy of the country and the regional demand of larger vessels for seaborne traffic, the government laid down the plan to develop Deep Sea Commercial Ports at suitable sites along the coast of Myanmar.

MPA selected two places –
- Dawei Deep Sea Port Project
  (Italian – Thai Dev: Co.,ltd)
- Kyaukpyu Deep Sea Port and railway project (CITIC Group, China)
Public and Private Ownership Ratio of Port Facilities

Ownership Ratio (Quay length)

- Private (75%)
- Public (25%)
# General CargoHandled in Port of Yangon

(M.ton in thousand)

<table>
<thead>
<tr>
<th>No</th>
<th>Year</th>
<th>Import</th>
<th>Export</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2002-2003</td>
<td>6005</td>
<td>4835</td>
<td>10,840</td>
</tr>
<tr>
<td>2</td>
<td>2003-2004</td>
<td>5191</td>
<td>4609</td>
<td>9,800</td>
</tr>
<tr>
<td>3</td>
<td>2004-2005</td>
<td>5208</td>
<td>4773</td>
<td>9,981</td>
</tr>
<tr>
<td>4</td>
<td>2005-2006</td>
<td>5514</td>
<td>4725</td>
<td>10,239</td>
</tr>
<tr>
<td>5</td>
<td>2006-2007</td>
<td>5623</td>
<td>5332</td>
<td>10,955</td>
</tr>
<tr>
<td>6</td>
<td>2007-2008</td>
<td>6240</td>
<td>5619</td>
<td>11,859</td>
</tr>
<tr>
<td>7</td>
<td>2008-2009</td>
<td>6150</td>
<td>6166</td>
<td>12,316</td>
</tr>
<tr>
<td>8</td>
<td>2009-2010</td>
<td>9492</td>
<td>6655</td>
<td>16,147</td>
</tr>
<tr>
<td>9</td>
<td>2010-2011</td>
<td>12307</td>
<td>6131</td>
<td>18,438</td>
</tr>
<tr>
<td>10</td>
<td>2011-2012</td>
<td>14461</td>
<td>7261</td>
<td>21,722</td>
</tr>
<tr>
<td>11</td>
<td>2012-2013 (Up to November)</td>
<td>8627</td>
<td>5099</td>
<td>13,726</td>
</tr>
<tr>
<td>12</td>
<td>2016-2017 (Estimate)</td>
<td></td>
<td></td>
<td>39788</td>
</tr>
<tr>
<td>13</td>
<td>2030-2031 (Estimate)</td>
<td></td>
<td></td>
<td>123041</td>
</tr>
</tbody>
</table>

Growth Rate 83.17% for (5) years, 100.38% for coming (10) years.
<table>
<thead>
<tr>
<th>No</th>
<th>Year</th>
<th>Import</th>
<th>Export</th>
<th>Total (TEU)</th>
<th>Total (M.T in thousand)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2002-2003</td>
<td>97.573</td>
<td>98.140</td>
<td>195.713</td>
<td>2838.689</td>
</tr>
<tr>
<td>2</td>
<td>2003-2004</td>
<td>86.867</td>
<td>86.457</td>
<td>173.324</td>
<td>2676.184</td>
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<tr>
<td>3</td>
<td>2004-2005</td>
<td>78.223</td>
<td>77.361</td>
<td>155.584</td>
<td>2664.521</td>
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<tr>
<td>4</td>
<td>2005-2006</td>
<td>86.130</td>
<td>85.775</td>
<td>171.905</td>
<td>2606.160</td>
</tr>
<tr>
<td>5</td>
<td>2006-2007</td>
<td>99.942</td>
<td>97.337</td>
<td>197.279</td>
<td>3148.045</td>
</tr>
<tr>
<td>6</td>
<td>2007-2008</td>
<td>115.267</td>
<td>111.236</td>
<td>226.503</td>
<td>3462.489</td>
</tr>
<tr>
<td>7</td>
<td>2008-2009</td>
<td>133.712</td>
<td>130.294</td>
<td>264.006</td>
<td>3937.131</td>
</tr>
<tr>
<td>8</td>
<td>2009-2010</td>
<td>152.077</td>
<td>151.333</td>
<td>303.410</td>
<td>4372.025</td>
</tr>
<tr>
<td>9</td>
<td>2010-2011</td>
<td>175.315</td>
<td>171.327</td>
<td>346.642</td>
<td>4571.902</td>
</tr>
<tr>
<td>10</td>
<td>2011-2012</td>
<td>207.540</td>
<td>200.503</td>
<td>408.043</td>
<td>5594.589</td>
</tr>
<tr>
<td>11</td>
<td>2012-2013 (Up to November)</td>
<td>149.430</td>
<td>154.721</td>
<td>304.151</td>
<td>3944.733</td>
</tr>
<tr>
<td>12</td>
<td>2016-2017 (Estimate)</td>
<td>Estimate</td>
<td>will be</td>
<td></td>
<td>9039.74</td>
</tr>
<tr>
<td>13</td>
<td>2030-2031 (Estimate)</td>
<td>Estimate</td>
<td>will be</td>
<td></td>
<td>21712.04</td>
</tr>
</tbody>
</table>
Inland Water Transport

- Ayeyarwaddy River - 1534 km
- Chindwin River - 730 km
- Thanlwin and rivers in Mon State - 380 km
- Rivers in Ayeyarwaddy Delta - 2404 km
- Rivers in Rakhine State - 1602 km
  Total - 6650 km

<table>
<thead>
<tr>
<th>Name of river</th>
<th>Catchment (sq-km)</th>
<th>Navigable Route (km)</th>
<th>Discharge (million cu-m)</th>
<th>Sediment Transport (million ton)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ayeyarwaddy</td>
<td>288900</td>
<td>1332</td>
<td>313720</td>
<td>278</td>
</tr>
<tr>
<td>Chindwin</td>
<td>115300</td>
<td>730</td>
<td>141290</td>
<td>131</td>
</tr>
</tbody>
</table>
Inland Water Transport

- IWT is operating passenger cum cargo transportation & the ferry services
- 218 inland waterways ports
- Maximum drafts are about 4.5 ft to 5.5 ft.
- No terminals capable of handling containers
### The Capacities of Inland Vessels in Myanmar

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vessels</td>
<td>-225</td>
</tr>
<tr>
<td>Barges</td>
<td>-148</td>
</tr>
<tr>
<td>Pontoon</td>
<td>-39</td>
</tr>
</tbody>
</table>

Number of vessel: -412
Total Road Length: 148690 km
Paved Road: 33014 km
Express Way: 666.36 km
Number of registered vehicles: 2476672 (June, 2012)
Railway Transportation in Myanmar

- A state owned and sole operator of the rail system in Myanmar.
- Total Route Length – 5844.03 Km
  - Single Truck – 5143.21 Km
  - Double Truck – 700.82 Km
  - Bridges – 11659 Nos
  - Tunnels – 12 Nos
  - Stations – 926 Nos
- 64.352 passengers and 3.58 freight tons in million
Cross-border railways connections
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

**Missing lines**
- Kalay-Tamu = 127.4 km**
- Lashio-Rueli = 141.8 km**
- Thanbyuzayat-Three Pagoda Pass = 110 km**

**The route lengths of missing lines are referred from feasibility reports**
Myanmar Logistics Development

National Level Workshop on Economic Development through the Integration of Logistics Services was held in Nay Pyi Taw on 17-18 of March 2008.

Participants:

- Officials
- Entrepreneurs from Private Sectors
- Economic Experts
THE CONSULTATIVE COMMITTEES

To formulate the Policy, Time Frame and Action Plan in accordance with related sectors, 5 consultative committees have been formed with concerned Ministries:

- Infrastructure development
- Transport services development
- Laws, rules and regulation
- Human resources development
- IT development

After that the national logistics policy and roadmap will be adopted based on committees’ measures.
## Liberalization Status of Logistics Services

<table>
<thead>
<tr>
<th>No</th>
<th>Measure</th>
<th>Time Line</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Maritime cargo handling services (CPC 741)</td>
<td>2013</td>
<td>Completed</td>
</tr>
<tr>
<td>2</td>
<td>Storage &amp; warehousing services (CPC 742)</td>
<td>2013</td>
<td>Completed</td>
</tr>
<tr>
<td>3</td>
<td>Freight transport agency services (CPC 748)</td>
<td>2013</td>
<td>Not Complete</td>
</tr>
<tr>
<td>4</td>
<td>Other auxiliary services (CPC 749)</td>
<td>2013</td>
<td>Not Complete</td>
</tr>
<tr>
<td>5</td>
<td>Courier services (CPC 7512**)</td>
<td>2013</td>
<td>Completed</td>
</tr>
<tr>
<td>6</td>
<td>Packaging services (CPC 876)</td>
<td>2013</td>
<td>Completed</td>
</tr>
<tr>
<td>7</td>
<td>Customs clearance services</td>
<td>2013</td>
<td>Not Complete</td>
</tr>
</tbody>
</table>
### Liberalization Status of Logistics Services

<table>
<thead>
<tr>
<th>No</th>
<th>Measure</th>
<th>Time Line</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td><strong>International Freight Transportation (CPC 7212)</strong> excluding cabotage</td>
<td><strong>2013</strong></td>
<td>Completed</td>
</tr>
<tr>
<td>9</td>
<td><strong>International rail freight transport services (CPC 7112)</strong></td>
<td><strong>Beginning 2008</strong></td>
<td>Not Complete</td>
</tr>
<tr>
<td>10</td>
<td><strong>International road freight transport services (CPC 7213)</strong></td>
<td><strong>Beginning 2008</strong></td>
<td>Not Complete</td>
</tr>
</tbody>
</table>
Economic Corridors in GMS

Economic Corridors in Myanmar

- East West Corridor
  Mawlamyine - Myawady - Da Nang

- Southern Corridor
  Dawei - Quy Nhon/Vung Tau

- North-South Corridor
  Kunming - Mongla - Kyaington - Tachileik – Bangkok

- Northern Corridor
  Fangcheng - Muse - Mandalay – Tamu

- Western Corridor
  Tamu - Bagan - Mawlamyine
ASIAN and ASEAN HIGHWAY ROUTES IN MYANMAR

AH1 - Myawaddy-Payagyi (Yangon) - Meikhtila-Mandalay-Tamu (1665 km)
AH2 - Tachilek-Kyaing Tong-Meikhtila-Mandalay-Tamu (807 km)
AH3 - Monglar-Kyaing Tong (93 km)
AH14 - Muse-Lashio-Mandalay (453 km)
AH111 - Thibaw-Loilen (239 km)
AH112 - Thatton-Mawlamyine-Dawei-Mugui-Lenya-Kawthaung (1145 km)
AH123 - Dawei-Sinphyutaung-Bongti (141 km)

Total - 4543 km (Inside Myanmar)
Cooperations and Coordinations are being taken to implement the measures under the roadmap for the integration of Logistics Services of ASEAN.

Trainings related to the Multimodal Transport & Logistics for both public and private are being conducted with the cooperation of Department of Transport, Myanmar Maritime University and UNESCAP.

Infrastructure Development Projects on Air, Maritime, Road and Rail Transport are being taken to be in line with international standards.

Actions are being taken to utilize applicable IT by MPA.

Actions are being taken to form National Logistics Association in near future.
Future Development Plans
Priorities on Air Transport Sector

To achieve the (12) objectives of air transport sector, the following projects will be implemented within 2011-2012 to 2015-2016 fiscal year;

- Construction of new Hanthawaddy International Airport
- Allowing private sector to participate in the operations of airports
- Adoption of a National Air Transport Policy
- Drawing up and implementing a Master Plan for Civil Aviation Development
- Updating respective Acts and Rules
- Reforming the institutional set-up of the DCA
- Setting up an Airports Authority
Priorities on Air Transport Sector

- Relations with international organizations
- Promoting technology and enhancing Human Resource Development
- Improving Yangon International Airport, Coco island Airport, Putao Airport, Sittwe Airport, Kyaukpyu Airport, Thandwe Airport, Kalay Airport, Nyaung U Airport, Heho Airport, Myitkyina Airport and upgrading Naungmom Airport, Phalan Airport, Manaung (Samonte) Airport, Mong-hsat Airport
- Enhancing air navigation services which will remain under the jurisdiction of the DCA
Priorities on Maritime Transport Sector

- Purchasing new 37 vessels with Japanese loan or grant aid USD 31.77 million for the replacement of old ones
- Upgrading Dala dockyard with Japanese Grant aid
- Getting three ferries for the Pansoedan-Dala ferry line
- Extending new international terminal along the Yangon river for the development of Yangon port area
- Establishing new five terminals for international shipping in Thilawa port area with loan or grant
- Conducting the training of Ayeyarwaddy and Chindwin rivers
- Constructing six modernized new domestic ports in Ayeyarwaddy and Chindwin rivers with grant or loan
Priorities on Road Transport Sector

- Shwebo- Myitkyina road
- Mawlamyine- Ye- Dawei- Meik- Kawthaung road
- Meikhtila- Taunggyi- Kyaingtong- Tacheleik road
- Monywa- Pale- Gangaw- Kalaymyo road
- Yargyi- Kalaywa road
- Mandalay- Thabeikkyin- Tagaung- Bhamaw- Myitkyina road
- Minbu- Ann- Sittwe road
- India- Myanmar- Thai Tripartite road
Priority Projects for Transport Development

- National Transport Network System needs to implement in line with the current political and economic systems of the State.

- National Integrated Transport Master Plan will be formulated for long term and sustainable transport development.

- In the present Stage, Consultants of JICA and Officials concerned of Myanmar are taking initial process to conduct the feasibility study to adopt the strategies for the Transport Development and also to formulate the National Integrated Transport Master Plan by 2014.

- At the same time, infrastructure improvement actions are required urgently to conduct in order to support the process of poverty reduction, development of socio economy of the people and settlement of constraints in the transport sector.
Projects to be implemented with the Assitances

For the development of Inland Water Transportation and Multi-dimensional development of Ayeyarwaddy river, the following projects will be implemented with the assistances;

- Navigation Channel improvement in Ayeyarwaddy and Chindwin Rivers
- Weirs Plan on Ayeyarwaddy River
- Improvement of (6) Inland Ports along Ayeyarwaddy and Chindwin Rivers
- Installation of Navigation Equipments along the waterways
- Purchasing New Vessels and Barges for Inland Water Transport
- Construction of a New Multi Purpose Terminal at Thilawa with loan
Large amount of sediment load concentration of the Ayeyarwaddy and Chindwin Rivers are important factors that affect to river’s morphology and environmental changes.
Proposed Pilot Project in Yatabo Waterway, Mandalay Region

<table>
<thead>
<tr>
<th>Sr.no</th>
<th>Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Feasibility Study + Design</td>
<td>Euro 2.0 million</td>
</tr>
<tr>
<td>2.</td>
<td>Ayeyarwaddy river channel improvement</td>
<td>Euro 400 million</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sr. No</th>
<th>Township</th>
<th>Location</th>
<th>Dist. from estuary (km)</th>
<th>Width of River (meter)</th>
<th>Above MSL (meter)</th>
<th>Discharge (m³/sec)</th>
<th>Height of weir (Head) (meter)</th>
<th>Back water length (km)</th>
<th>Water surface area bet. Two weirs (sq. km)</th>
<th>No. of Turbine</th>
<th>Output Power (MW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Myingyan</td>
<td>Yantabo</td>
<td>806</td>
<td>760</td>
<td>59.5</td>
<td>6290</td>
<td>8.5</td>
<td>94</td>
<td>240</td>
<td>6</td>
<td>180</td>
</tr>
</tbody>
</table>
Appropriate Sites of New Inland Ports

- **Ayeyarwaddy River**
  - Sinkham Port
  - Mandalay Port
  - Pokokku Port
  - Magway Port

- **Chindwin River**
  - Monywa Port
  - Kalewa Port

The estimate cost: US$ 60 million

- **Benefits** - Facilitation and efficient transportation
  - Developing new inland ports
  - Developing SEZ and industrial zones
  - Getting more revenue
  - Creating employment opportunities
  - Developing foreign investment

- **Costs** - US$ 60 millions.
Thilawa Port Development Projects

- To cope with the growth of the maritime trade volume after adoption of the market oriented economy of the country.
- A New Multi Purpose (5) Terminals at Thilawa will be established.
Projects to be implemented with the Assitances

Road Transport


- **Rehabilitation at 21 Bridges**: Maubin, Balaminhtin, Twantay, Pathein, Myaungmya, Gyaing, Attrayan, Maei, Kyaukkyi Pauk, Snarepauk, Lonetawpauk, Dedokepauk, Thanthamagyi, Thanthamachay, Thazintanpauk, Wanphite, Minkyaung, Yanmaung, Kisspanaddy, Minchaung.

- **Upgrading of Research Labs at Yangon, Naypyitaw, Mandalay.**
Projects to be implemented with the Assistances

Rail Transport

- National Railways Strategic Plan
- Rehabilitation and Modernization of Yangon-Mandalay Railway System
- Mandalay – Myitkyina track signal upgrading
- Bago – Dawei track upgrading
- Yangon – Pyay track upgrading
- Tamu - Kalay - Segyi - Monywa - Mandalay Project
- Improvement of Urban Railway System in Yangon City
- Refurbishment of Diesel Locomotives
- Upgrading of Railway Technical Training Center
Thank You

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