

 **MYANMAR-LUXEMBOURG**   
**DEVELOPMENT COOPERATION**

**A REVIEW OF REPRESENTATIVE AND  
PROFESSIONAL BODIES  
(RESEARCH STRAND 5)**

**Myanmar Tourism Human Resource Development  
Strategy & Action Plan  
2017-2020**



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PROFESSIONAL BODIES

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Strategy and Action Plan (2017-2020)

Ministry of Hotels & Tourism  
2017

# ACKNOWLEDGEMENTS

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The HRDSAP was drafted by Dr Paul Rogers, MYA/001 Senior Tourism Specialist, with significant contributions by Mr Paul Penfold, MYA/001 Tourism Human Resource Development Advisor. Consultants appointed to work on the supporting research strands included Daw Kyi Kyi Aye, Ms Caroline Callow, Ms Robyn Jackson, Ko Aung San Kyaing, Mr Cliff Lonsdale, Daw Lynn Lynn, Ms Natasha Martin, Daw Nay New, Ms Gloria Crabolu, Ms Catherine Smith, Mr Joe Vlahek and Ms Jo Williams, plus a number of national facilitators, translators and others around the country. Base maps were provided courtesy of the Myanmar Information Management Unit. Ms Catherine Russel edited the HRDSAP.

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- Myanmar Tourism Federation & Member Associations
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- BIF | HamsaHub Organization

## A REVIEW OF REPRESENTATIVE AND PROFESSIONAL BODIES (RESEARCH STRAND 5)

Myanmar Ministry of Hotels and Tourism (MOHT),

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# FOREWORD

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This Human Resource Development Strategy and Action Plan (HRDSAP) is the outcome of wide-ranging national research on the capacity of Myanmar's tourism stakeholders, undertaken in 2015 and 2016. The study was conducted by the Ministry of Hotels and Tourism (MOHT), with valuable support Project MYA/001 – "Development of Human Resources in the Hotel and Tourism Sector and Capacity Development of the Ministry of Hotels and Tourism" implemented by LuxDev, the Luxembourg Development Cooperation Agency.

The strategy guides and informs future work programmes of Myanmar's tourism and hospitality industry in a wide range of areas. It identifies policy actions and emphasises the urgent need for effective capacity building across three important areas namely, public sector governance, education and training, and the private sector.

I want to thank all those individuals, companies and organizations from the private and public sectors, non-governmental organisations (NGOs) and development partners who contributed their time, energies and ideas to the Strategy. I also acknowledge the strong role of MOHT's Training and Education Department and our counterparts from LuxDev who carried out all field work in a professional and timely manner. I would also like to thank the Myanmar Tourism Federation (MTF) and industry associations for supporting and joining the many consultation workshops and meetings.

Tourism is a labour intensive activity that will likely provide more jobs in Myanmar than any other sector. The sector's diverse activities offer a wide range of employment embracing, for example, airport services, taxi drivers, hotel staff, tour guides, tour operators, travel agencies and transport services, restaurants, handicraft producers and suppliers, as well as government staff. People employed in each of these areas need training, and it is fundamentally important for the government and private sector to work closely together to develop quality training and education facilities, and deliver tourism and hospitality skills training. As part of this process, coordination and cooperation between the government, private sector and development partners is essential to build synergy and strengthen human resource planning and management across the sector.

It is with the intention of meeting these training, education and capacity building needs that the HRDSAP has been prepared, and it is my view that the Strategy is a major contribution to the human resource development of Myanmar's Tourism Industry.

Please continue to share your thoughts and ideas on tourism human resource development in Myanmar with my colleagues and myself at the MOHT. You can contact me through email at [mo.moht@mptmail.net.mm](mailto:mo.moht@mptmail.net.mm)

**H.E. U Ohn Maung**  
Union Minister  
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Tourism is one of the most important economic activities in the world today. It directly generates services, products, employment and investments. In countries like Myanmar, where tourism is becoming a more and more flourishing service industry, the sector bears an important potential for gainful employment across the society and the country, but especially for young people.

Myanmar possesses great tourist potential and many attractions to be made further accessible in the future. In order for the possibly far-reaching economic and social impact on national development to materialize, human resources for the tourism and hospitality sector are essential.

Luxembourg's Development Cooperation has a solid track record in promoting skills development for tourism globally and in South East Asia, notably in Vietnam and in Lao PDR. We are proud to put the expertise acquired at the disposal of Myanmar.

The Government of the Grand Duchy of Luxembourg, through its Luxembourg Ministry of Foreign and European Affairs is therefore very pleased to support the Government of the Republic of the Union of Myanmar in the development and publication of the strategic plan for human resource development for tourism in Myanmar through its first bilateral project, entitled Development of Human Resources in the Hotel and Tourism Sector and Capacity Development of the Ministry of Hotels and Tourism, or MYA/001.

The Myanmar-Luxembourg cooperation will continue to expand its range of training and capacity development at all levels of the tourism and hospitality sector. On behalf of the Luxembourg Ministry of Foreign and European Affairs I wish to thank all those who participated in the data collection, focus groups and meetings, as well as the Ministry of Hotels and Tourism and the Myanmar Tourism Federation associations who contributed their time and expertise to coordinating and supporting the research which enabled the drafting of the present HRD Strategy and Action Plan.

We look forward to an on-going partnership with the Ministry of Hotels and Tourism and others to enable Myanmar to develop a professional and high quality tourism industry, and we believe that this strategy will lay strong foundations and directions for the future development of the sector, which will greatly contribute to Myanmar's striving economy. However, most importantly it will allow the next generations to fulfil their potential and to seek decent work and gainful employment.

**Mr. Claude Jentgen**

Chargé d'affaires a.i.,

Head of Development Cooperation Office in Vientiane, Laos

Ministry of Foreign and European Affairs

Luxembourg

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## ACRONYMS

CEC	Central Executive Committee
CRM	Customer Relationship Management
DPTOA	Domestic Pilgrimage and Tour Operators Association
EC	Executive Committee
GOM	Government of Myanmar
HRDSAP	Human Resource Development Strategy and Action Plan
ILO	International Labour Organisation
MACA	Myanmar Arts and Crafts Association
MHA	Myanmar Hoteliers Association
MHPA	Myanmar Hospitality Professionals Association
MOHT	Ministry of Hotels and Tourism
MRA	Myanmar Restaurant Association
MSEA	Myanmar Souvenir Entrepreneurs Association
MTF	Myanmar Tourism Federation
MTGA	Myanmar Tour Guides Association
MTHCGSA	Myanmar Tourist Health Care and General Services Association
MTHRDA	Myanmar Tourism Human Resources Development Association
MTM	Myanmar Tourism Marketing
MTMP	Myanmar Tourism Master Plan
MTTA	Myanmar Tourism Transportation Association
PATA	Pacific Asia Travel Association
UMTA	Union of Myanmar Travel Association
UMFCCI	Union of Myanmar Federation of Chambers of Commerce and Industry

# Executive Summary

The National League for Democracy Government's focus on tourism as one of the key drivers of Myanmar's economic development puts the industry – and therefore the MTF and its Associations – in the spotlight.

Tourism revenues in Myanmar reached \$2.1 billion in 2015; it is estimated that tourism could contribute \$14.1 billion to GDP and employ around 2.3 million people by 2030.<sup>1</sup> As the sector is largely service-driven and does not require the same infrastructure investment as sectors such as power, natural resources and manufacturing, tourism can quickly add jobs to the economy.

The industry needs a strong private sector to support this growth and deliver high quality services to tourists. Members of MTF and the Associations are key to this support

This report looks at the current capabilities of the Associations and makes recommendations to strengthen their administration, support organisational reform, and assist in developing fee-based services that can make the Associations sustainable.

The strategies to this approach are as follows:

## (1) Embrace change: strengthen Association administrations

Association ECs have historically been more interested in building their own businesses than using their substantial business acumen to represent and deliver value to the industry as a whole.

Although this is understandable given the growth and rate of change in their business environment in recent years, this approach needs to be modified to support the industry in the future.

It is recommended that MTF and the Associations look at their current working behaviours and structures, considering how to modify them in order to build best practice organisations capable of supporting new governmental policies and growth targets in the tourism industry. They effectively need to reposition their organisations to focus on delivering service, and services, to both their members and the industry.

Reform will be best fostered internally and requires strong leadership, which the ECs are able to provide.

## (2) Build best practice organisations

MTF and the Associations should aspire to build best practice organisations – in other words, associations that are 'effective, legitimate and progressive<sup>2</sup>', focusing their efforts on:

- Improving their members' and the sector's profitability and competitiveness
- Supplying sound information and advice for members
- Promoting training and education
- Promoting standards and service quality

It is recommended that MTF and its Associations be provided with tools and training to help them function to an international standard.

This will allow them to better meet the demands of their members in Myanmar and communicate more confidently with their counterparts overseas.

## (3) Build financial sustainability

The MTF and its Associations are woefully short of funds. Association members often don't pay fees because they see no value in their membership: therefore, the Associations struggle to survive financially, and are not able to pay their own fees to MTF. As a result, MTF is short of funds and does not offer service value to the Associations.

To move forward, this cycle needs to be broken. This can be achieved if all parties develop and deliver more value-adding fee-based services, which will in turn improve standards in the tourism sector.

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<sup>1</sup> McKinsey

<sup>2</sup> <http://www.taforum.org/a->



#### **(4) Unify and leverage synergy**

It is recommended that most of the Associations should retain their independence in the short-term, but cooperate more closely and align their processes so they can potentially share resources, ideas and learnings in the future. This alignment of their systems will facilitate alliances and collaboration, allowing the Associations to leverage their synergy.

One of the greatest current opportunities for synergy, and a recommendation in this report, is that MTF and MTM should merge their structures, joining together to deliver marketing services to the industry through the Associations and their members.

It is recommended that the programmes and trainings proposed herein be implemented and measured over an 18–24 month period, at which point an updated review should be undertaken to measure their success and to review the progress of the Associations and MTF in achieving sustainability.

# 1. Background

The Republic of the Union of Myanmar is undergoing political, economic and social change, and the tourism industry has been identified by the Government of Myanmar (GOM) as one of seven economic pillars to support reform processes, create jobs and stimulate the expansion of the wider economy.

The 2013–18 Myanmar Tourism Master Plan (MTMP), produced by the Ministry of Hotels and Tourism (MOHT), sets out a framework for sector expansion and calls for the design of a tourism human resource development strategy to facilitate its implementation.

Tourism is a labour-intensive industry. Most jobs are direct employment in the food and beverage, transport services and accommodation sectors. The industry also generates indirect employment through a wide variety of supply chain activity.

This report, focusing on the Myanmar Tourism Federation and its sector associations, is one of ten research and training needs assessments underpinning the design of a tourism Human Resource Development Strategy and Action Plan (HRDSAP).

## 1.1. Objective

This report examines the role of the Myanmar Tourism Federation and its 12 Associations within the tourism industry in Myanmar. The objective is to identify key issues and make recommendations that:

- Strengthen their management and administration
- Unify the Associations and the MTF
- Support their growth by expanding the membership base and services

Recommendations have been made to maximise the return and value of any investment in the training or programmes; these have been designed to be inclusive and open to all stakeholders in order to deliver maximum benefit to the industry.

## 1.2. Methodology

Meetings were held with members of all Associations (not just 6 as proposed in the original Terms of Reference) and the MTF.

These meetings were held in Yangon (primarily), Bagan and Nyaung Shwe, though not all Associations have representation outside of Yangon. Where schedules permitted, EC members participated; meetings lasted between 1.5 and 4 hours.

An introduction to this Strand and a guide to its questions was provided in advance of each meeting (Annex A). To add context to the overall project, a presentation of the feedback and recommendations from completed Strands in MYA/001 was also sent in advance and shared with participants during most meetings.

Discussions were informal and designed to encourage participants to openly share thoughts about the industry, their Association's needs and issues, and their relationship with MTF.

All participants were generous with their time, and free in the opinions and information they shared.

## 2. Findings

### 2.1. Myanmar Tourism Federation

The organisation in its current incarnation was formed in 2011 by MHA, UMTA and MTM; MTF is a member of both PATA and UMFCFI. Its federation of Associations (was 11, now 12) covers most business sectors of the tourism industry. With 26 members, the MTF EC is made up of the Chairpersons of its Associations; they meet on a regular, but not scheduled, basis.

MTF has full time staff in Yangon who support its executive, administrative, financial and IT functions; it employs national tourism advisors and has also used the services of international tourism advisors in the past.

Its stated mission is to 'represent the private sector to promote Myanmar as a responsible world-class destination, benefitting our communities, our culture, our values and our environment'. Their vision is to 'be the vehicle and voice for tourism's private sector to support inclusive growth as the journey continues'.

Services provided to its Associations include training, organising and attending national and international trade shows and exhibitions.

In terms of Activities, MTF manages the Miss Myanmar Contest, and is seeking donor and investor support to develop a 'new town' project development near Mandalay. It is also seeking government endorsement for a Tourism Development Bank.

Its biggest issue is lack of funds. Current financing comes 'from its own pockets'; MTF pays rent for its premises and staff are salaried. The Associations should pay a percentage of their fees in return for services, but many are not able to do so.

MTF also receives 8% of the fees paid by tourists entering Bagan; it is not clear if those funds are earmarked for particular projects or whether they contribute to supporting general administration.

MTF's representatives describe the organisation's role as 'a buffer' between the MOHT and private industry; it steps in on behalf of the MOHT when the latter is not able to take action for a project. It also 'supports foreign companies looking to invest in the tourism sector'.

#### Observations

During the meeting, it became apparent that MTF offers only limited services to its Associations due to financial constraints. Because MTF is not able to develop and offer services, the Associations aren't willing to pay fees. This cycle needs to be broken.

### 2.2. Associations

#### 2.2.1. The 'Big Three': MHA, UMTA and MRA

The longer-established Associations are also the strongest in terms of experience, staffing, administration and member services. Their potential fee base is wider and deeper, and their members include some of the most successful and profitable businesses in the tourism industry.

#### (1) Union of Myanmar Travel Association (UMTA)

UMTA was founded in 2002. Its membership reaches 300 companies in 2007 and it currently has 906 members, recording 705 renewals and 201 new members last year. Membership used to be compulsory for travel agents but is now optional.

UMTA estimates a pool of 2000 potential new members: these are tour companies registered countrywide that have not yet joined. Fees are 20,000 kyats on registration plus 100,000 kyats annually, but there are concerns that these are too high. Associate membership is open to non-travel agents at 50% rate.

The Association has 9 full time employees (CEO, admin, accountant, PR and IT/assistant) and is governed by a 16-person EC; a new Chairman was elected recently. It also manages sub committees in Management, Information, Finance, Membership Affairs and Discipline, Human Resources Development, Statistic and Research, Tourism Development and Market Promotion, and its constitution is currently being reviewed with assistance from ILO. It recently took on a short-term overseas volunteer with extensive experience in private and NGO organisations.

Its stated mission is to 'assist in the sustainable development of Myanmar's tourism industry, promote the image of the country, create new job opportunities, and assist in the economic development of Myanmar'.

UMTA has a two-year action plan to:

- 'Stand as an independent, member-centred non-governmental organisation
- Strengthen the capacity of UMTA members and strive for development of human resources to assist Myanmar's tourism development'
- Assist Myanmar tourism micro, small and medium-sized enterprises in sustainability and help gain more market share with innovative marketing strategies
- Ensure transparency and accountability in the selection of scholars and/or UMTA representatives to international training events and forums
- Give real time information to members on all contacts with international organisations via UMTA's media unit
- Cooperate in corporate social responsibility activities with reliable Civil Society Organisations and broaden the membership base
- Strengthen relations and cooperation with other industry-related organisations for mutual benefit
- Establish a reliable and compact entity to oversee and manage out-bound tourism business'

The EC meets monthly to review progress towards these objectives.

Member services include training courses specific to members (some are chargeable, such as \$30 for an airline ticketing course, but many are offered free of charge): there are plans to investigate tourist insurance and marketing software for members. UMTA has never surveyed its current membership for feedback about services, and does not list benefits to potential new members.

Representatives bemoaned the lack of cooperation with other Associations – they want to work more closely with both MTGA and MHA, and to lead the charge on developing new destinations, but say that the other Associations are not interested in collaborating.

They highlighted an urgent need for accurate industry research that would be made available to all industry stakeholders. They also highlighted their own Association's need for business planning skills.

## Observations

UMTA has a new Chairman with a wealth of experience in tourism. He is keen for UMTA to be a trailblazer in improving standards and skills in the industry, whilst keeping a focus on responsible tourism. (UMTA is supporting initiatives at Inle Lake to educate workers at the grass-roots level to raise awareness on both environment issues and the dangers of sex tourism.)

The Association believes that MTF should focus on education and soft skill training to deliver more value to tourists and visitors, and should not be directly involved in infrastructure projects. Its representatives are positive about the appointment of the new Minister, particularly because of his tourism industry background.

## (2) Myanmar Hoteliers Association (MHA)

MHA was founded in 2002 and officially recognised by the Ministry of Foreign Affairs in 2003.

Membership is 'not obligatory', but a hotel cannot apply for a license without membership or endorsement from the Association – so for all intents and purposes, it is obligatory. The Association has 800+ members countrywide (961 hotels and 18 Joint Venture/Foreign Direct Investment hotels, giving a total room count of 37,048 across 20 zones).

MHA is governed by a 16-member Central Executive Committee (CEC) and a 67-member EC from different regions. It has 11 sub-associations under its Executive Committee and is in the process of establishing nine more. Members have a free vote to elect officers to the national EC for each 3-year term; regional EC elections are voluntary. Country-wide member meetings are held annually, Yangon meetings held monthly, and regional EC meetings held every 3 months.

The Association has a constitution that has been amended but is not yet ratified; it employs seven full-time staff in Yangon in administration, event-planning, communication and finance.

The basis for fee levels is a potential member's hotel room count: it also varies depending on the type of membership (ordinary, associated etc.). Fees are paid annually in advance: 40% of fee revenue goes to support HQ and the remainder is distributed to the zones.



Other revenue sources include an annual calendar, networking, trade fairs, donations and hospitality training. MHA represents members at international fairs and offers advertising and sponsorship options to members. Future plans are to expand training to language and IT programmes.

MHA communicates to its members via emails and disseminates information through its website, but representatives admitted they don't communicate often enough.

MHA's vision is to 'empower the Myanmar hotel industry to achieve sustainable growth and be competitive at international standards', while its mission is 'to unite and represent nationwide hotels, motels, inns, lodgings and guest houses so as to help develop the member systematically [sic] and to solve the problems of the hotel industry effectively'.

Participants reported that members' most common request was for staff training.

Members of the Bagan branch said that it had been difficult to drum up interest in the Association locally – one reason being that the majority of hotel owners did not live in the area.

In Nyaung Shwe, the same individual represented both MHA and MRA. His personal vision for MHA is for it to aspire to international standards and cooperate with local colleagues from other Associations to solve shared problems.

In both locations, members from several Associations cooperate to solve issues affecting their businesses such as garbage disposal and road repairs.

## Observations

The Bagan representative voiced a personal opinion that MOHT should be setting (ASEAN) standards in the industry and that, whilst there were too many Associations under the MTF's banner, it is not possible to merge Associations because every Association wants independence. He did not think hoteliers would join the Association if it wasn't obligatory, as it did not offer any useful services.

He bemoaned the lack of funds for training and said that vocational training schools were needed countrywide.

He described a recent successful training programme organised informally by MHA, MRA and MHPA; they had charged \$15 for classes. In the future they want to offer training that leads to a recognised certificate, preferably NSSA.

Individuals from MHA are professional and enthusiastic, and believe their cooperation model with MRA and MHPA can be supported and duplicated.

## (3) Myanmar Restaurant Association (MRA)

MRA was established in 2011 by 28 founding members and currently has 400+ members and affiliates. Membership is not obligatory.

Its EC, comprising 26 elected members and 4–5 managed sub-committees, meets monthly. MRA employs 11 staff in its headquarters (none dedicated to marketing) and 4–5 in sub-committees.

The annual membership fee is 100,000 kyats; chains of up to 10 restaurants must pay for each restaurant to be a member individually. Foreign restaurants may join.

Additional sources of revenue include restaurant shows, food festivals and donations. MRA offers courses in English, cooking, and hygiene (it is currently working with street vendors in Yangon), and supports members who wish to enter cooking competitions and food exhibitions. There are future plans to establish a training school.

Members' primary concern is industry staffing, so they want to both expand training programmes and develop on-the-job training. They indicated that industry information is critical to them, but they don't have the capacity for research.

They would like to expand collaboration with other Associations, but say it's hard because their EC is only part-time.

The Bagan MRA team said its relationship and communication with Yangon was good. There are 160 restaurants in Bagan and only 40 are members, so they have an opportunity to grow their member base. They have pulled together an endorsement programme locally and want to build upon it.

They want to be registered as an entity within their own MRA zone (there is one of 12 MRA zones). They mentioned that Yangon has requested payment of some fees from them, but they refused because they do not find the 'centralised rules' to be appropriate. They want the Association's constitution to be modified to specify that such rules must be approved by all zones before they are accepted.

They have delivered local training through MHPA, and were satisfied with the service, but commented that the fact that MHPA is not officially registered with MOHT weakens the validity of the course.

The same individual represents both MHA and MRA in Nyaung Shwe. He complained about the lack of regulations for new restaurant openings – he pointed out that many new owners had never even run a business before, and that although they have 76 local members, many restaurants don't have licences. He said that MRA wants to support and encourage these businesses through the Association.

## Observations

MRA is well-organised. Its representatives in both Bagan and Inle have ideas to build the Association and offer services which can be duplicated in other destinations. The issue of local Association registration should be addressed – though the belief is that at this stage of market development it would weaken the central body.

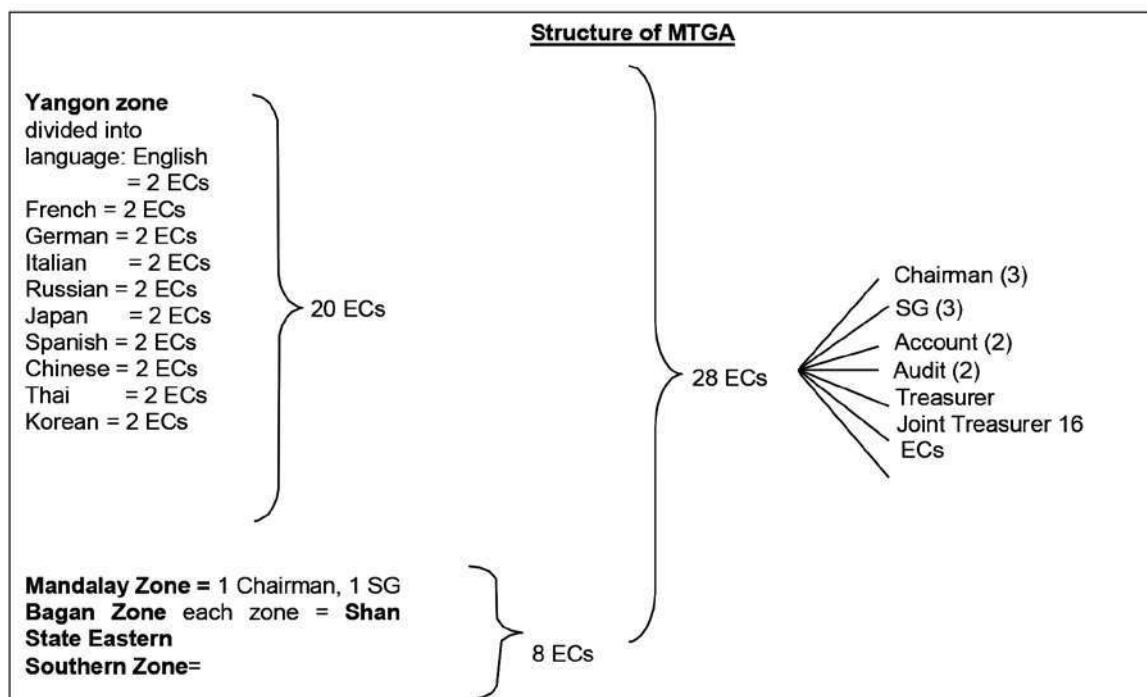
### 2.2.2. Associations of Individuals: MTGA, MHPA and DPTOA

The majority of these three Associations' members operate as self-employed individuals, which gives the Associations unique operational issues: members don't have corporate support to pay their membership dues, and also have practical problems such as limited free time to dedicate to attending meetings and supporting their Associations.

#### (1) Myanmar Tourist Guide Association (MTGA)

MTGA was officially recognised in 2011, but has not yet received its registration. It has 1,461 members as of September last year (the total number of licensed guides across the country is 3,997).

Its constitution was ratified in 2012. Its EC comprises 28 members, who sit for a two-year term and can each be re-elected one time. The Association's structure is best demonstrated by the following diagram:



Source: Workshop Report, Organisational Development of MTGA (source MTF/MTGA), September 2015

Meeting participants want the EC to be representative of the organisation as a whole rather than being made up only of Yangon guides; they also complained about the language split, with representatives of Korean language guides having the same representation as English language guides. They want Yangon's guides to be part of a zone (as in other areas), and for the MTGA EC to be made up of guides from all zones.

Registration and annual fees are 10,000 kyats and 15,000 kyats for national guide license holders and 5,000 kyats and 7,500 kyats for regional guide license holders. Registration fees are paid at the national level, and annual fees are paid to the regional associations. MTGA earns additional revenue from seminars, calendars, study tours and donations, but doesn't have audited accounts.

The Association no longer has any employees (it previously had one administrative assistant), and says it needs 10 new members per month to cover its current expenses.

MTGA's key activities include organising excursions, educational talks in the off-season (30 were delivered last year), and knowledge-sharing sessions for new tour guides. The regional offices arrange their own member activities. They want to increase the number of training programmes on offer, but are restricted by lack of expertise, time and money. Members share information through Facebook and email.

All meeting attendees said that training standards for new guides needed to improve and be certified by NSSA rather than just receiving MOHT endorsement. They claimed that out of 8,000 guides, fewer than 2,000 can be considered 'true professionals'

## Observations

MTGA members' greatest strength is their enthusiasm and commitment to their vocation. But this strength also creates issues – the myriad of individual opinions may lead to disunity, makes decision-making difficult, and threatens to alienate them from UMTA, who they described as 'their employers'.

MTGA should seek to improve its communication and working relationship with UMTA. MTGA Yangon complained about operational problems: contract issues with UMTA members, such as overtime payments, cancellation fees, customer complaints; wanting membership of its Association to be compulsory; needing office space from MTF; and more – but admitted that they did not cooperate often or closely enough with UMTA to solve issues. Improved communication and openness is needed.

If it can increase revenues through improved services, MTGA would benefit from a paid, full-time CEO. That individual's mission would be to unify members and drive support to ensure they stay ahead of the industry, upskill, and embrace technology.

## (2) Myanmar Hospitality Professionals Association (MHPA)

MHPA was founded in May 2011: it was originally established and managed by MHA. It now has 700 members. Anyone working in the hospitality industry can join, but they are not yet registered (which is important for them, particularly to have recognition for training).

There has only been one election to the CEC/EC since the association was founded. MHPA's CEC meets at least twice every month.

MHPA has 11 regional associations (corresponding to MHA 'zones'), each with their own ECs. There is an office with four staff in Yangon. The CEC has 30 members, and there are between 20 and 30 EC members from the different zones. Each zone has 11 'clusters' that represent vocations such as front office, housekeeping, food and beverage, human resources and security, for which they offer training courses.

MHPA only charged membership fees in 2011; fees are listed at 30,000 kyats per annum, but representatives claim that many members cannot afford fees. The Association's primary revenue source is from training courses. It also organises seminars, talks, workshops and networking events.

Its stated mission is to be the 'leading and most supportive organisation for the development of Myanmar's hospitality professionals through education, professional developments, mentoring and networking'. Its members have produced a flyer describing their Association, but it's not clear where this is distributed.

Representatives from Bagan's MHPA confirmed that they don't pay fees to Yangon, because it doesn't provide any services. They cooperate informally with the local chapters of MHA and MRA, and have delivered training in the region for which they were paid. They voiced a desire to be 'recognised' by Yangon's MHPA.

## Observations

Because MHPA is made up of individuals, it shares some of the same issues as MTGA.

Its greatest challenge is to establish a niche for its skills training that can be clearly differentiated from MTHRDA and clearly communicated to its customers.

MHPA representatives complained that they are often thought of as a labour union because they represent industry employees, but they might wish to look into actually carving a niche for themselves in this area, to be a voice for workers' rights in the industry. They are reluctant to work more closely with other Associations, particularly MHA, because they believe that their 'worker voices' will be drowned out by 'owner voices'.

As they develop their training portfolio, they can market and sell their training services through other Associations.

### (3) Domestic Pilgrimage and Tour Operators Association (DPTOA)

DPTOA was registered in 2014; its EC comprises 15 people, and it has 180 members. Members' fees are 100,000 kyats on signup and 300,000 kyats per year.

Its membership is primarily made up of individuals and unlicensed agencies (reportedly, 90% of agencies are not licensed in Myanmar). Its representatives said that their members often ran high-turnover businesses, but because of company incorporation issues (which weren't fully clear), they weren't able to offer the same privileges to their members as UMTA.

DPTOA raised a number of operational issues that could be addressed by improved communication. Its representatives highlighted irregularities with tourist transport vehicles, many of which are not insured or checked for roadworthiness, and the fact that their members' domestic tourism vehicles were not granted the same road access and privileges as UMTA's international tourism vehicles.

There was a discussion about endorsement programmes. DPTOA does not have a professionally-managed programme, but its representatives believe they are well placed to develop a scheme: they have traffic police on their committee, and currently offer a car replacement service if a vehicle breaks down. They also have a good relationship with Myanmar Insurance.

(During the meeting, one DPTOA representative said that he was the sole representative of MTTA countrywide and that MTTA did not offer any services.)

## Observations

The EC members who attended the meetings were enthusiastic about the issues in their Association and clear about where they needed support: their problems were nearly all operational, not financial. As an Association, they want equality with other groups (particularly UMTA).

They can carve a niche for their members, but in the short term need to communicate and cooperate more closely with UMTA.

### 2.2.3. Rejuvenated Associations

It had been reported by various parties that MTHRDA, MTHCGSA and MTTA were 'not very active', but they have all been rejuvenated to a greater or lesser degree. Their ECs are enthusiastic, keen to build their organisations, and the sectors they represent would benefit from strong Association support.

#### (1) Myanmar Tourism Human Resources Development Association (MTHRDA)

MTHRDA was founded in 2010. It used to be called the Myanmar Hospitality and Training Centre Association, and originally had eleven members (all private schools) – nine in Yangon and two in Mandalay. Schools must be legally registered and provide vocational training in order to be eligible for membership (which isn't compulsory).

MTHRDA is fully registered as an Association and has both a constitution and a mission: 'to contribute to human resources development and economic, educational and social progress [...] through collaborative efforts to provide international level training courses; to network with international tourism/hospitality training associations and educational institutions; to develop the youth attending tourism and hospitality training courses into well-rounded professionals; and to recruit tourism and hospitality management experts to provide professional advice to benefit the Association'.



In 2015, it was reported that the Association had no regular meetings, no office, no staff and no activities; its only potential revenue stream was an initial registration fee of 200,000 kyats from members (no annual dues were owed).

However, it seems that MTHRDA has recently had a resurgence.

It now employs one person (a member's staff member) to support administration needs, has 18 schools as members (with 2 representatives sent from each school, making 36 individuals), and is offering train-the-trainer programmes.

MTHRDA sees itself as a key association for the NSSA's work on standardisation, and wants to be an endorser of skills to provide national assessment services based on NSSA standards: right now, students study but their certification is not widely recognised. With recognition, certification could count as credits for further education both in Myanmar and overseas.

## Observations

MTHRDA wants to be empowered to certify on behalf of NSSA, but seems to have only recently become active again as an Association. Its members will need to demonstrate their expertise and qualification to MOHT to turn this into a reality – they should continue to develop relationships with MOHT and MOE.

It was suggested to its representatives that they should propose that the draft tourism law include licensing for schools – if MOHT accepts such a proposal, it would create a niche for MTHRDA to work closely with MOHT and MOE to manage such licensing.

Representatives say they want stronger cooperation with MHPA but have been rebuffed, even though some of MHPA's individual members are MTHRDA master trainers. They want 'donor assistance', but have not yet prepared any proposals for donors.

## (2) Myanmar Tourist Health Care and General Services Association (MTHCGSA)

Until late last year, MTHCGSA (originally established in 2011) was inactive – it had just two members, no revenue base, no services, no office and no staff. Its sole activity was to organise distribution of a Myanmar Healthcare Guide brochure to hotels.

It was told by MTF that it would de-registered/struck off unless it became active (although the Association is apparently not yet registered).

As a result, it amalgamated membership of the Private Hospital Association (about 100 members) under its banner.

The exact status of this arrangement is not fully clear – they are two separate associations, but have the same individuals on their ECs. The Private Hospital Association does not collect fees – it is 'privately funded', and more than 50% of private hospitals in Myanmar are members.

MTHCGSA wants to develop its Association and services for tourists; to do so requires a new constitution that focuses on tourist healthcare. The experts at the meeting said that hospitals in remote areas were often 'frightened' to accept foreigners because they didn't understand their expectations and service needs, even for non-medical issues such as payment (cash vs credit cards).

MTHCGSA said that only private hospitals would be interested in offering tourist services.

Representatives were enthusiastic about making the Association stronger and providing training and health services within the tourism sector. They recently launched a list of hospitals that they have 'audited', which are capable of delivering medical services to tourists – the possible beginnings of an endorsement programme.

## Observation

MTHCGSA's status, particularly with regard to its new tie-in with the Private Hospital Association, is not fully clear, but it can potentially contribute by opening its membership to associates (hotels, restaurants, transport, tour guides etc.) and offering services such as medical training and materials to those members.

Support for a more professional endorsement programme for hospitals and clinics with the skills and equipment to assist and treat foreign visitors in medical emergencies could improve standards.

Its members need to liaise with the Ministry of Health, overseas clinics, and the insurance industry to design their service package.

### (3) Myanmar Tourism Transportation Association (MTTA)

An EC member from DPTOA in Yangon reported that MTTA was inactive and that he was the only active EC member, in addition to his duties at DPTOA.

However, a meeting was organised in Nyaung Shwe with two Association 'members' who represented lake and road transport in the area.

The road transport representative complained about the number of drivers operating illegally in the area and highlighted the need for more checks on tourist transport providers. He pointed out that \$200 for a 'blue plate' licence (for tourists) did not guarantee that vehicles were checked for insurance or road-worthiness.

Lake transport described similar problems. The representative said that: boats carrying foreigners were supposed to be licensed but instead went unchecked; underage (and intoxicated) drivers were commonplace; and, pollution was a growing issue because there were no limits to the number of licenses issued. Additionally, many boats were not licensed at all: he estimated that only 4,000 of the 20,000 boats on Inle Lake were registered. According to the representative, boat licenses from MOHT cost 30,000 kyats – but can be obtained from the Transport Department at half the price – but they aren't recognised by MOHT. The representative also complained about how complicated the licensing process had become.

Both representatives bemoaned the lack of parking in the local area and safe jetty space for boats.

### Observation

Neither of the representatives were able to comment on general Association business, but both raised issues that indicated that there could be a role and services for a rejuvenated MTTA. An Association 'voice and support' could tackle many of the operational issues.

If MTTA expanded its membership to include other (relatively wealthy) transport providers such as airlines and car companies/manufacturers, it could play a prominent role in both the tourism and transport sector.

### 2.2.4. 'Disunited' Associations

The MSEA Chairman said that handicrafts members were no longer a part of MSEA, so MTF introduced and arranged a meeting with the newly-formed handicrafts Association, MACA.

### (1) Myanmar Souvenir Entrepreneurs Association (MSEA)

MSEA was founded in 2012. There has been only one election to the EC since the Association was founded, and 35 members were elected. The EC meets on an ad-hoc basis. The Association doesn't have an office or charge membership fees and offer activities or services.

The new Chairman (recently appointed for a 2 year term) said the handicrafts group had recently split off from the Association, and that MSEA now only includes members involved in souvenirs.

MSEA has have 41 members, who are all entrepreneurs, but the new Chairman believes the constitution is too entrepreneur-focused and wants to change it. He wants to expand membership to include all companies within the value chain, such as importers, retailers and distributors. He knows that manufacturing is expensive in Myanmar, and confirmed that many souvenirs could be imported.

Outside of Yangon, a meeting was arranged with a lacquerware producer in Bagan who said that there were no MSEA members in Bagan (he recalled one meeting several years previously). That artisan described his priority need as marketing and branding to assist in building an export market.

### Observations

The Yangon representative is enthusiastic about the business, but as MSEA no longer includes locally-made handicrafts, its contribution to tourism is minimal – it is simply a group of commercial businesses which retail products that tourists may want to buy.

MTF might wish to let this Association leave the tourism arena and just focus on their commercial activities.

## (2) Myanmar Art and Craft Association (MACA)

Newly formed, MACA was officially registered in December 2015. There were 6 founder members; the EC comprises 18 individuals.

It has a membership base of around 100. Membership fees are 5,000 kyats on sign-up and 36,000 kyats per annum, but MACA waives these fees if a potential member cannot afford them.

### Observations

MACA is keen to establish a well-run Association and to represent, support and develop the handicraft sector.

There is an excellent opportunity for this Association to grow using 'best practice' with support from the programmes outlined in the recommendations within this report (page 21).

## 2.2.5. MTM – A greater opportunity?

### (1) Myanmar Tourism Marketing (MTM)

MTM was formed in 1996 to support and deliver the 'Visit Myanmar' promotion alongside MHA: it was previously called the Myanmar Tourism Promotion Board. It became MTF's marketing arm in 2010, though it now considers itself 'independent' of both MOHT and MTF.

It has 138 members, including two international companies, many of which are also members of UMTA. According to member feedback, larger companies join 'to engage with trade shows', while SMEs join to 'get market information'.

Ordinary member fees are 500,000 kyats per year, and Associate Member 350,000 kyats per year.

The EC is made up of 16 members, directly elected by members. Only ordinary members are eligible for election, and only after two years of continuous membership. MTM has 5 full-time staff in administration, marketing and PR roles.

Primary services are the organisation of, and participation in, trade shows and fairs, the arranging of public relations activities, distributing industry newsletters, and training in collaboration with PATA. MTM publishes an annual report. Member benefits include access to the Association's database (although it is not clear what this database contains) and discounts on trade events (non-members can also join the events, without a discount). Some events now have government subsidy.

### Observations

MTM is an anomaly amongst the Associations in that it doesn't offer services to members per se; rather it simply supports the creation of marketing output, which in turn supports the wider MTF mission. Although it signalled a 'disconnect' from MTF, it is still the de facto marketing arm of the tourism industry.

The value of MTM's output could be exponentially greater if it was leveraged by, and delivered directly to, all Associations and their members.

## 3. Issues

### 3.1. Association Issues<sup>3</sup>

Most of the Associations are short of funds, and in many cases they have no or few full-time staff to manage administration. They are run by ECs made up of tourism professionals who give their time on a voluntary basis, and who often own and manage their own successful businesses. The ECs are not always democratically elected. The period of office for ECs and the number of officers and subcommittees varies between Associations.

Several Associations, notably MHA, MRA and MTGA, have branches in other key tourist destinations that want to establish a standalone entity. The typical reason given for this is that regional members feel they do not receive adequate services or communication from their head office.

The Associations also share common structural problems and skill-gaps.

### 3.2. SWOT Analysis and Other Issues

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Enthusiasm of ECs and members to contribute positively to the tourism industry</li> <li>• Business acumen and local market experience – most members have developed and continue to manage profitable tourism businesses</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of financial resources and support staff</li> <li>• Lack of adequate business, marketing and management skills to run a successful Association</li> <li>• Little mutual respect between Associations – a focus on differences rather than synergy means industry value is not maximised</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Harnessing the Associations' combined business acumen and market reach can deliver substantial value to the tourism industry</li> <li>• Unifying the Associations' structures, processes and systems (such as accounting, database management and CRM) promotes collaboration and growth but does not diminish independence</li> <li>• Structural reform and skill development lets Associations approach donors and foreign counterparts directly to support their growth</li> </ul>	<ul style="list-style-type: none"> <li>• Stagnation – if individuals and entities don't change their behaviour and business habits, they cannot hope to meet the demands of an burgeoning tourism industry</li> <li>• Lack of services development and fractious communication may lead members to build splinter groups, ultimately weakening the power of the whole</li> </ul>

Other problematic areas include the following.

#### Working style

- The Associations generally operate with a 'silo mentality': they share common tasks, ideals and issues but then prefer to operate only inside their own Association. They are unwilling to share resources or ideas, or take on board suggestions for improvements. Consultants have worked with MTF and its Associations in the past, but have not succeeded in changing outdated processes or having recommendations adopted. There is a resistance to change.

#### Structure and governance

- Not all Associations are registered. Some Associations don't have constitutions (or their constitutions need amendments); many don't have clear visions, objectives or values.
- ECs are peopled by the same individuals or companies. Even if they are the only available volunteers, this does not lead to strong governance – the net for EC officers should be spread wider.
- Most EC members have permanent jobs running their own businesses, which often creates a conflict of interest and can also limit the time dedicated to Association matters.

<sup>3</sup> These issues are, by necessity, generalisations and do not apply to every Association.



## Membership fees

- At this stage of market development, member fees – paid in return for services – should be the main revenue generator. In findings, several Associations didn't charge any fees or waived them if the member 'could not afford to pay'. In many cases, members refuse to pay fees because they do not receive any services.
- Financial information related to total fee revenues was unavailable, and member fee structures were unclear/possibly arbitrary. There cannot be a correct fee base calculation without a review of the costs of services, their monetary value to members' businesses, potential membership bases, Association running costs and other considerations. Financial and business planning skills are limited.

## Members and member services

- Few Associations were able to describe member services, and some don't offer any services at all. None have surveyed members to ask what benefits they expect, would pay for, or want.
- Associations quote member numbers, but it's not certain how accurate they are, or how many members join more than one Association. There does not appear to be any central database of current members which could provide this information and indicate how large the potential base of members is.

## Communication

- Internal communication is often via Facebook. Sharing and learning from colleagues' experiences was reported as a cornerstone of value to many members, but this communication is often restricted to a geographic location or a limited clique of members.
- Fractured communication from headquarters (usually in Yangon) has forced individuals in other geographic regions to consider setting up their own entities, which, at this stage of market development, weakens the main body.
- Some Associations use external communication tools such as newsletters, but not on a regular basis; some have websites. But most do not communicate benefits to potential members, nor do they promote their Associations to the general industry.
- Although there is clearly a lot of informal communication between individuals, formal inter-Association communication – which can solve problems, boost member services and promote synergy – is rare.

### 3.3. MTF Issues

MTF shares many of its Associations' issues: lack of funds, issues related to organisation and good governance, skills gaps and a limited service offering to its Associations.

It spends its (very limited) time on activities which don't necessarily support the Associations, instead of creating and delivering services and support to them; such services could translate into badly-needed revenues.

Relations between MTF and its Associations are not wholly positive – some comments made by Association members during meetings included:

- "MTF needs more coordination and communication; MTF offers some training courses but does not communicate about them to all members."
- "MTF is working more closely with UMTA and MHA and ignores other Associations."
- "MTF should be a voice for the industry, but it isn't."
- "MTF should be an independent body, not private – it should be semi-governmental and neutral."
- "MTF doesn't provide any services, so nobody will pay fees."

As MTF is made up of Association members and with them regularly, these issues should be tabled, aired and discussed.

MTF has an opportunity to create a platform to ease tensions that may otherwise be holding back industry unity and growth.

## 4. Recommendations: MFT and Associations

### 4.1. A Need for Change: 'Old Ways Won't Open New Doors'

These recommendations can only make a difference if stakeholders are open to embracing change.

There needs to be a shift in working behaviour and practices within both the Associations and MTF for programmes and training to be fully successful.

Delivering change within an organisation is difficult (and in the findings it was frequently reported that for cultural reasons, fostering change in Myanmar is particularly difficult). However, nearly all the individuals and ECs that were met recognised a need for change.

They want support to learn new ways to manage their Associations.

Acceptance of the need for change is the first step to delivering change.

Behavioural change in organisations cannot be forced there needs to be 'buy-in' and commitment from all stakeholders.

A united approach is needed. The motivation should be lead and demonstrated by MTF and supported by its Associations.

Senior EC members can lead reform.



### 4.2. Independence

Given the limited resources available, an argument could be made that it makes financial sense to merge some of the 12 Associations so that they can pool resources.

However, this report's findings lead to a recommendation that supports independence for most Associations. Associations can instead be given the tools to carve out their niche in the industry.

If EC members are willing to play an active part in training programmes, make structural changes within their organisations, and implement new ideas and programmes, the Associations can develop into more powerful entities that add value to the tourism industry and support its growth.

If some choose not to participate, it might be that they will not be able to survive as standalone Associations.

### 4.3. Development of services

The Associations need to deliver compelling services and business reasons to retain their existing members and attract new ones. Fees from existing and new members need to be able to sustain the running of each Association.

A quick glance at overseas organisations (not just in the tourism sector) revealed the main reasons that members join an association to be:<sup>4</sup>

- Networking and events
- Professional skills development and training
- Learning best practices
- Information/industry news/research
- Business promotion, marketing, branding and visibility

<sup>4</sup> <http://www.webbrightservices.com/the-association-blog/top-reasons-members-join-industry-or-trade-associations>

These services are really very straightforward, and some are already offered.

The point to highlight is that Association ECs and committees are all capable of developing these services and of delivering them in a professional manner. They can quickly translate these into membership fees to support their operations.

Workshops and trainings will provide the Associations with the tools to develop their own services in these areas and quickly promote them to members.

## 4.4. Recommended workshops and training programmes

The programmes described below are intended to strengthen the administrations, upskill ECs so that the Associations can run more efficiently, and support the development of services that will generate fees from existing and new members.

Overall, the approach is designed to support the functions of an international-standard Association. These programmes should:

- Ensure maximum impact/benefit for each resource investment to benefit as many of the Associations and/or their members as possible
- Deliver programmes that are professionally managed, but require both input and action from the Associations and the MTF to make them sustainable
- Encourage Associations to increase their joint cooperation, highlighting synergistic opportunities and demonstrating how collaboration can improve value-addition
- Promote sustainable ways to foster change from within the organisations themselves – without that ‘buy-in’, any change will only be short-lived

The approach is to support investment in trainings that are delivered through at least one Association, to members of more than one Association simultaneously, and in programmes delivered to Association ECs that can be repackaged as training to be delivered as a member service.

These recommendations will also lead to unity and alignment in the Associations’ administrative systems and processes, making it easier for them to share resources (such as staff, accounting packages, CRMs, etc). In turn, this will facilitate alliances and collaboration between Associations.

It is recommended that progress be reviewed after 18–24 months, at which point additional or new strategies might be recommended. This could include merging Associations which have not been able to leverage their opportunities to grow.

### 4.4.1. Change management workshop (MTF and Associations)

The tourism industry in Myanmar contains many experienced professionals who operate successful, profitable businesses. The MTF and its Associations’ administrations can be supported to use these skills to begin to reform their organisations from within, at the same time as working with third parties such as donors and consultants.

Most of the training recommended in this report requires proactive and equal input from MTF and its Associations.

In order to deliver that input, there needs to be a change in how the Associations and individuals manage their day to day roles and how they accept new processes into their own management styles and introduce them within their organisations and to their members.

A workshop programme will look at the internal systems and behaviours that need to change to allow the Associations to build organisations robust enough to support the growing tourism market.

### 4.4.2. Information gathering project (MTF and Associations)

Basic information about the Associations and MTF is currently incomplete, unverified, and therefore not wholly reliable.

It is not feasible to do business planning without accurate information. It is critical to understand the current situation accurately in order to plan for future sustainability.

It is recommended the Associations support disclosure. The information would be recorded on an agreed software platform and held confidentially, although shared with each specific Association.

This project will take several days to complete and requires MTF and Association support.

Information would include, but not be limited to:

- Audited accounts, budget and financial information
- Entity registration status and documentation
- EC members' backgrounds, professional positions and roles within the Association
- Complete member information and information on potential members in the sector
- Existing constitution, vision, mission and business objectives

#### 4.4.3. Workshop series (MTF and Associations)

Deliver a series of workshops led by industry professionals.

The workshop materials will be packaged as an operations manual for each Association; in that way, the knowledge stays within the Association and has not been vested within an individual and potentially lost.

Workshop topics would include, but not be limited to:

- Association best practice guidelines, including comparisons and learnings from foreign counterparts such as Tourism Australia and Tourism Malaysia
- Corporate governance, including roles and responsibilities
- Financial management and business planning
- Developing a vision, a mission, objectives and values: defining a clear identity for each Association
- Developing and pricing member services and membership
- Marketing, branding and social media management
- How to define and communicate membership benefits

Workshops will be presented to 2–3 senior representatives of MTF and each Association, and those representatives will then disseminate the learning internally.

Each workshop will have an immediate and measurable outcome – for example, at the end of 'Developing a vision, a mission and objectives', those goals should be close to complete for the Association.<sup>5</sup>

Materials will then be repackaged into training workshops that Associations can offer to their members as paid-for training – i.e. these would make up new service offerings to members.

Attending joint workshops allows senior representatives the opportunity to discuss and foster respect between their Associations.

#### 4.4.4. Intranet Development (Associations and MTF)

Communication (both within each Association and between Associations and their members), administration, and database management are critical areas for improvement. The ability to communicate and disseminate information is an essential service for existing and potential members.

Developing and providing a standard intranet template (modified for each Association) would provide a powerful communication tool for internal and external communication.

A simple front-end of a few pages can be developed as a website for Associations that don't currently have a website, but the critical value will be in the back-end, a private network that will be accessible only to each Association's members.

A password-protected area will allow the Associations to manage all communication, membership information, database management, discussion forums and information pertinent to their membership.

Each intranet would be specific to the needs of a given Association.

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<sup>5</sup> Some Associations already have these statements, but they can perhaps be improved upon. Others are starting from scratch.

For example, MTGA's intranet could include:

- Calendar for all internal meetings, with local and international events also marked
- Forum for internal discussions and sharing
- Online library/knowledge base (about destinations and Myanmar history); local and international press clippings; environmental information
- Employment opportunities
- Online English, and other language, learning services
- Information relating to members, who are often self-employed – insurance, tax, pensions, etc.
- Contacts for other organisations
- Details about members: contact information, photo, etc.
- Support for female guides
- First aid information

The advantage of such a facility is to:

- Manage administration (doing work equal to the normal output of 1–2 staff)
- Improve international communication
- Deliver a value-added (chargeable) service that the Association can charge membership fees for
- Add a level of unity to the Associations: the intranet will be private, but as the processes would be the same, they could allow for the sharing of staff for management and the merging of information in the future if desired.

#### 4.4.5. Member service: endorsement programmes (Associations)

The Associations need to develop services that make membership compelling and help to add monetary value to members' business.

Some Associations, notably MRA, have started small endorsement programmes, but such programmes need to be delivered to international standards to be truly successful.

This training will teach attendees to develop such programmes and measure their value to individual member companies and to the industry.

Programme criteria and training would be delivered for all participants. The endorsements should add value to members' business and also raise industry standards. Some examples would include:

- **MRA**: with input from food safety experts. 'Recommended by MRA' stickers.
- **MTHCGSA**: with input from medical experts.
- **MACA**: with input from marketing and artisan specialists.
- **MTTA**: working with the Transport Ministry and the insurance industry.

#### 4.4.6. Training via Associations to benefit Members and Industry

Some Associations already deliver training programmes that members may pay a fee to attend. These initiatives can be supported and expanded so that training best practices are developed, recorded and duplicable.

All Associations highlighted the need to improve English skills across the tourism industry.

A pilot programme for intensive English-language training is recommended at a destination outside of Yangon. It is recommended that this pilot programme be delivered in Bagan through the Associations and for their members.

Several Associations could support this programme, such as:

- Lesson delivery and support through MTHP
- Daily food supported/subsidised by MRA
- Accommodation (classroom) supported/subsidised by MHA

Participants would pay a subsidised amount for training and include representatives across all Associations.

The project's process would be documented in full to create a blueprint for rollout in other key tourist destinations.

## 4.5. Additional Recommendations – MTF

The relationship between the Associations and MTF has occasionally been strained in the past, but there are opportunities to build positive communication for the future.

MTF now sees a need for reform to build an organisation that can lead the industry and be trusted as an independent and united voice of the private sector.

In an ideal world, MOHT would be able to establish a tourism board that would deliver a cohesive and comprehensive tourism marketing strategy for the country. This is unlikely to happen in the short term, primarily due to financial constraints.

In an ideal world, MTF would also be a financially independent body, separate from the government, representing Myanmar's tourism private sector. This actually is viable, and could be achieved in the short to medium term.

To achieve this scenario, it is recommended that:

### - MTF develops relevant services

MTF should focus on developing services that are relevant to its Associations and for which they would be willing to pay fees, rather than devoting time to activities which do not add value to its Associations and which the Associations are apparently not willing to support.

MTF can host an industry brainstorming session, supported by a professional moderator, to discuss new ideas for relevant services; such services might include industry research, business support services, marketing services and others.

A brainstorming session encourages input from all stakeholders, focusing on services that benefit the industry.

### - MTF and MTM merge their structures

MTM employs trained staff, some with marketing experience, and apparently earns revenues from membership dues.

These revenues could be made to work harder and deliver more value under an MTF mandate than within the restricted reach of MTM.

The marketing materials developed would have a much wider dissemination than they do now, and would benefit more members from more Associations than they do right now.

MTF's marketing services, provided with the support of MTM's expertise, could be a key service that Associations could contribute to.



## Annex A

### Guiding Questions for Discussion and Feedback Myanmar Tourism Federation Member Associations

#### I. ADMINISTRATION and MEMBERSHIP (this information may be provided in advance)

1. How many members do you have?
2. What are the different classifications of members (for example, public sector/private sector/foreign companies/local companies) in your Association?
3. Do you have different levels of membership (for example, Gold/Silver)?
4. What services do you provide to members?
5. Do members pay fees for these services? If yes –
  - a. What are the fees for different membership classifications per annum?
  - b. What is your annual revenue from membership fees?
6. How often do you communicate with your members? How do you communicate?
7. How many individuals make up your EC?
  - a. How many of these are paid positions?
8. How many staff members work in administration for the Association?
  - a. How many full-time? How many part-time?
  - b. Which positions are paid, and which ones are unpaid?
  - c. Do you have job descriptions available?
9. Are any staff required to manage administration and coordination with MTF? If so,
  - a. How many staff members and how many hours are required?

#### II. YOUR ASSOCIATION – FOCUS GROUP DISCUSSION

Some questions and topics may not be relevant. They are for guidance only. Please feel free to raise new discussion points at the meeting.

1. In what way does your Association and your members contribute to the growth and development of tourism in Myanmar?
  - a. What is your mission?
  - b. Do you have examples of how you are achieving that mission?
  - c. If not, what changes are required to allow you to deliver?
2. What are the goals and priorities for the development of your Association as a professional membership Association?
  - a. Current strategies and targets for new members? Types of members? Future plans and targets?
  - b. Greatest obstacles to delivering those plans and your proposed solutions?
3. What new services do you want to offer to members?
  - a. What resources would be required to deliver?
  - b. What positive impact could that have on tourism in Myanmar?
4. What skill sets are needed in your Executive Committee?
  - a. Can current skills be improved upon?
  - b. What sort of training is required to improve skills?
  - c. How can the value of an investment in training be measured? How can a more efficient EC contribute?
5. What training and development needs to your Association members have?
6. How will improved training increase their contribution to tourism development?
7. What resources could be helpful to the Association to help its members?
  - a. What would the top three priorities be (examples might include library materials, teaching resources, equipment).

8. Does your Association cooperate or work closely with other Associations?
  - a. If so, which ones?
  - b. Can that cooperation be improved?
  - c. Is there an advantage for some Associations to merge?
  - d. What are the advantages and disadvantages of mergers?

### **III. YOUR ASSOCIATION and THE MTF**

9. How do you see the role of the MTF?
  - a. How does or should their role differ from your Association's role?
  - b. How much value do you gain from being part of the MTF?
  - c. Can you give examples of the value they bring?
10. What are the advantages and disadvantages of being a member Association of the MTF?
11. What are your suggestions for MTF to improve their support to Associations?





**MYANMAR-LUXEMBOURG**



**DEVELOPMENT COOPERATION**

