

 **MYANMAR-LUXEMBOURG** 
DEVELOPMENT COOPERATION

**A REVIEW OF PUBLIC SECTOR GOVERNANCE ISSUES
(RESEARCH STRAND 1)**

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



A REVIEW OF PUBLIC SECTOR TOURISM
GOVERNANCE ISSUES

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Myanmar Human Resource Development
Strategy and Action Plan (2017-2020)

Ministry of Hotels & Tourism
2017

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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 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 Russell edited the HRDSAP.

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- BIF | HamsaHub Organization

A REVIEW OF PUBLIC SECTOR TOURISM GOVERNANCE ISSUES (RESEARCH STRAND 1)

Myanmar Ministry of Hotels and Tourism (MOHT),

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FOREWORD

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

H.E. U Ohn Maung

Union Minister

Ministry of Hotels and Tourism

Republic of the Union of Myanmar

Nay Pyi Taw

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.,

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ACRONYMS

ADB	Asian Development Bank
DMO	Destination Management Organisation
EOI	Expression of Interest
GOM	Government of Myanmar
HR	Human Resources
HRD	Human Resource Development
HRDSAP	Human Resource Development Strategy and Action Plan
ILO	International Labour Organization
JICA	Japan International Cooperation Agency
MCITP	Myanmar Community Involvement in Tourism Policy
MEPMS	Myanmar Ecotourism Policy and Management Strategy
MOAI	Ministry of Agriculture and Irrigation
MOBA	Ministry of Border Affairs
MOC	Ministry of Commerce
MOCUL	Ministry of Culture
MOCARA	Ministry of Culture and Religious Affairs
MOCOP	Ministry of Cooperatives
MOE	Ministry of Education
MOECAF	Ministry of Environmental Conservation and Forestry
MOFA	Ministry of Foreign Affairs
MOFR	Ministry of Finance and Revenue
MOHA	Ministry of Home Affairs
MOHT	Ministry of Hotels and Tourism
MOI	Ministry of Industry
MOIN	Ministry of Information
MOIP	Ministry of Immigration and Population
MOLES	Ministry of Labour, Employment and Social Security
MONPED	Ministry of National Planning and Economic Development
MONREC	Ministry of Natural Resources and Environmental Conservation
MOPAF	Ministry of Planning and Finance
MORA	Ministry of Religious Affairs
MORT	Ministry of Rail Transport
MOSAT	Ministry of Science and Technology
MOSWRR	Ministry of Social Welfare, Relief and Resettlement
MOT	Ministry of Transport
M RTP	Myanmar Responsible Tourism Policy
MTMP	Myanmar Tourism Master Plan
NWCD	Nature and Wildlife Conservation Division
PA	Protected Areas
TDCC	Tourism Development Central Committee
TVET	Technical Vocational Education and Training
TTA	Tourism Technical Authority
UAGO	Union Attorney General's Office
UNESCO	United Nations Educational, Scientific and Cultural organization

EXECUTIVE SUMMARY

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 expansion of the wider economy. Tourism is a labour intensive industry, forecast in the Myanmar Tourism Master Plan (MTMP) to generate over a million new jobs by 2020. Most of these jobs are direct employment in the food and beverage, transport services and accommodation sectors. Total tourism-related employment, including direct, indirect and induced employment generated through industry supply chains, is forecast to create roughly two million new jobs by 2020. Tourism is therefore positioned to reduce poverty, as the sector provides entry-level employment opportunities in current and emerging destinations around the country for both semi- and unskilled workers. In addition, roughly 60% of these direct employment positions are taken up by women.

Tourism is, however, a diverse and pervasive activity that requires strong coordination of investments by the public and private sectors. From a governance perspective, the MTMP suggests that 25 ministries have tourism-related roles and responsibilities. It also notes that responsible tourism, which seeks to maximise the sector's potential to alleviate poverty, demands a whole of government approach to tourism planning and management. This approach is needed at the centre, state/regional, and district and township levels. As Myanmar is a relative newcomer to international tourism, the objectives of this report are to (a) review the tourism-related roles, responsibilities and competencies of government ministries and departments, and (b) assess and prioritise public sector human resource development needs for responsible tourism planning.

Formulation of the report included a review of written documentation, the distribution of a short questionnaire and, primarily, structured semi-formal interviews with a series of government officers and related stakeholders in Nay Pyi Taw and in the states/regions of Mandalay, Rakhine and Shan. Findings from these lines of enquiry, profiled in the body of this report, point to a range of interventions that are needed to strengthen public sector tourism planning and management processes at the centre, state/regional and destination levels. The MTMP, for example, recommends that tourism committees and destination management organisations (DMOs) be formed in each state/region, and in key tourism destinations, to assume local responsibility for tourism planning and management. These bodies have yet to be established. Similarly, at the centre level, a lack of tourism industry awareness and technical knowledge has held back opportunities to promote strategic and integrated tourism planning. The following interventions are recommended to strengthen tourism governance throughout the country:

- Review the membership, roles and responsibilities of the TDCC
- High-level strategic briefings to ministries and state/regional governments
- Tourism industry awareness training for government technical staff
- Tourism destination planning awareness training for government technical staff
- The preparation of toolkits to establish and operationalise DMOs
- Tourism training needs assessments for key ministries
- Activity and financial planning for MOHT staff in branch offices
- Training needs assessments for gathering tourism-related data
- A review of visitor safety and crisis management protocols and processes
- The promotion of tourism research partnerships
- The production of a 90-minute documentary film on the future of Myanmar's tourism industry

It will be noted that many of these recommendations are centred around the need to raise industry awareness and technical competence among government stakeholders. While tourism might be seen as one of the many development priorities that have awareness-raising and capacity building needs across multiple government departments, it is somewhat distinct: consumers and investors travel to the point of production, and can arrive in increasing numbers to progressively overwhelm destinations, causing growing problems for management systems, resident communities and the environment. Myanmar's Responsible Tourism Policy and Tourism Master Plan warn against complacency and advocate action to prevent such consequences.

1. BACKGROUND

The Republic of the Union of Myanmar is undergoing political, economic and social change. 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 expansion of the wider economy. The 2013–20 Myanmar Tourism Master Plan (MTMP), produced by the Ministry of Hotels and Tourism (MOHT), sets out a framework for sector growth and calls for the design of a tourism human resource development strategy to both facilitate the Master Plan’s implementation and capitalise on opportunities for the tourism sector to reduce poverty.

Tourism is a labour intensive industry, forecast in the MTMP’s high-growth rate scenario to generate over a million new jobs by 2020. As depicted in Table 1, most of these jobs are direct employment in the food and beverage, transport services and accommodation sectors. The industry also generates indirect and induced employment through a wide variety of supply chain activity, which in comparable economies is roughly equal to the direct employment generated. This suggests that total tourism-related employment (including direct, indirect and induced) could generate roughly two million new jobs by 2020.

Table 1: Estimated Direct Tourism Employment in Myanmar, 2012–2020

SUBSECTOR	2012	Conversion		High	
		2015	2020	2015	2020
Accommodation	44,055	63,333	84,300	125,417	224,700
Food and beverage	146,850	211,111	281,000	418,056	749,000
Recreation and entertainment	29,370	42,222	56,200	83,611	149,800
Transportation services	58,740	84,444	112,400	167,222	299,600
Travel services	14,685	21,111	28,100	41,806	74,900
TOTAL	293,700	422,222	562,000	836,111	1,498,000

Source: Myanmar Tourism Master Plan (2013)

This report, focusing upon public sector governance issues, is one of ten research and training needs assessments to underpin the design of a tourism Human Resource Development Strategy and Action Plan (HRDSAP). The MTMP states that 25 ministries have tourism-related roles and responsibilities. It also recognises that the diverse and pervasive nature of tourism activity demands a whole of government approach to sector planning and management at the centre, state and regional, and district and township levels. To promote integrated planning, the MTMP advocates the formation of a high-level coordination board, state and regional tourism councils, and destination management organisations (DMOs). A national level Tourism Development Central Committee (TDCC), chaired by a vice president and with representation from 13 ministries, chief ministers from the states and regions, the MTF and UMFCI was formed in 2014; however, state or regional tourism councils have yet to emerge and DMOs have only partially come together in Bagan and Inle Lake where development partner projects are active.

The objectives of this report are to review the tourism-related roles, responsibilities and competencies of government ministries and departments, and also to assess and prioritise public sector human resource development (HRD) needs for responsible tourism planning. The report addresses (horizontal) issues across ministries as well as (vertical) issues from the centre to the site and destination level.

2. METHOD

The activities described in this report were undertaken between November 2015 and the end of March 2016, a period which contained the 2015 general election and the subsequent handover of government control to the newly elected National League for Democracy Party. This unprecedented period of change presented research challenges, as many government officers were occupied with other pressing agendas and there was a range of uncertainties regarding future government plans and priorities.

The methods used to achieve the report's objectives included a review of written documentation, the distribution of questionnaires, and structured semi-formal interviews with a series of government officers and related stakeholders. While a short questionnaire was used as an introductory activity to assess HRD issues across government ministries at the centre level, interviews were used as the primary method to review and assess HRD issues at the central and state/region levels.

At the centre level, a basic overview of the tourism-related roles and responsibilities of government ministries is illustrated in the MTMP and is copied here as Table 2, depicting ministry roles in relation to the implementation of the Myanmar Responsible Tourism Policy's (MRTP)¹ priority actions. Each of these ministries was invited to a meeting to launch the design of the HRDSAP, provided with the short questionnaire, and advised they would be contacted for follow-up interviews. The questionnaire (attached as Annex A) asked:

- 1) If the ministry has clear tourism-related roles and responsibilities.
- 2) If there is a need to better define these responsibilities.
- 3) Which departments these responsibilities are delegated to.
- 4) If delegated officers have the required skill sets to effectively perform their roles.
- 5) If there are training or capacity-building needs to help perform tasks more effectively.
- 6) If tourism-related responsibilities are viewed as high or low priority.

To follow up on the preliminary lines of enquiry covered in the short questionnaire, ministries were contacted for appointments and sent topics for meeting discussions. These topics, together with the notes recorded during the discussions, are summarised in Table 3. This table includes topics proposed to those ministries that were subsequently unable to meet, or that declined meeting requests. Of the 25 short questionnaires distributed, nine were returned. Follow-up phone calls ascertained that seven ministries and the Union Attorney General's Office regarded tourism-related issues to be of low priority and were unable to meet over the research period. These included the Ministries of Communications and Information Technology, Construction, Electric Power, Foreign Affairs, Industry, Information, and, lastly, Social Welfare, Relief and Resettlement. Meetings were held with all other ministries, and the results of these enquiries are presented below. It is to be noted that time limitation factors constrained the research, insofar as the representatives interviewed could not be expected to have at their disposal accurate and comprehensive answers to all lines of enquiry. While follow-up activities were undertaken, the research findings profiled below should be considered preliminary and in need of further verification.

Two states and one region were selected to profile governance-related tourism HRD and training issues: namely, Shan, Rakhine and Mandalay. These were selected due to the presence of flagship and emerging destinations within them. Meetings were sought with senior government representatives at the cabinet level, and key informants were identified by the directors of the MOHT branch offices. Lines of enquiry at these meetings included:

- How important is tourism as an economic activity?
- How is tourism planning & coordination dealt with at the state/region level?
- What is being done to encourage tourism growth?
- Have tourism and destination management work-plans and priorities been identified?
- What meetings or forums are used to discuss tourism issues at the state level?
- Who are the key actors moving the sector forward?
- How is stakeholder coordination managed?
- What challenges does tourism planning and management present?
- Are there any tourism HR awareness and training needs to move the sector forward?

Meetings were held with the Shan State government on the 21st and 22nd March, the Mandalay Region government on the 23rd and 24th March, and the Rakhine State government on the 28th and 29th March.

¹ The 2012 Myanmar Responsible Tourism Policy preceded the MTMP, which was drafted to align with the Policy.

Table 2: Roles of government agencies and the Myanmar tourism federation in select priority actions of the Myanmar Responsible Tourism Policy

Priority Actions	Lead Role ● Advisory Role ◆ Liaison Role *																											
	MOHT	MONPED	MOCUL	MOECF	MOAI	MOC	MOFR	MOIP	MOCON	MOFA	MOE	MOIN	MORA	MOT	MOCIT	MOHA	MOEP	MOCOP	MOBA	MOH	MOLESS	MOSWR	MOLF	MORT	MOST	UAGO	MTF	
Ensure integrated tourism planning.	●	◆	●	●	*	*	*	*	*				*	◆	*	*	◆	◆	*		*	●	*	*	*	*	◆	
Promote tourism investment processes that embrace responsible tourism development guidelines.	◆	●	*	*		*	◆	*		*	*	*		*	*			◆			*	*	*			*	◆	
Establish more tourism and hospitality training facilities and programs with standardized courses.	●	◆	*	*		*	◆		◆		●										*	*				●	◆	
Establish tourist information centers and promote visitor safety.	●		*	*		*		*				*	*					*									●	
Integrate domestic tourism as an important component of the tourism economy.	●	*				*	*						*	*	*	*	*	*	*		*	*	*	*	*		◆	
Collect and monitor consistent and robust tourism data and statistics.	●	*	◆	*	*	*	●	*	*	◆	*	◆	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	◆
Train local guides in responsible tourism and natural and cultural heritage interpretation.	●		◆	◆		*					◆	*	◆														●	
Ensure contract compliance and fair pricing for tourism services.	●					*	*					*					*	*			*					◆	●	
Establish a comprehensive national accommodation rating system consistent with ASEAN standards.	●							*									*									*	●	
Enable and support community based tourism activities that benefit local communities.	●			◆	◆	*	*	*				*	*	*		*	*	*		*	*	*	*	*			●	
Provide tourism awareness training to local communities and increase local participation in tourism supply chains.	●	*	*	*	*	*	●			*	*	◆	*	*	*		*	*		*	*	*	*	*			◆	
Develop a code of conduct & do's and don'ts guidelines for international visitors.	●		◆	*			*	*					*								*						◆	
Raise awareness and prevent all forms of abuse and exploitation of children, women and men.	●	*										◆				◆				*	*	*				*	◆	
Ensure the tourism sector manages the use of energy and water more effectively.	*	*		◆		*		●			*						●								◆	◆		

MOAI = Ministry of Agriculture & Irrigation; MOBA = Ministry of Border Affairs; MOC = Ministry of Commerce; MOCIT = Ministry of Communications and Information Technology; MOCON = Ministry of Construction; MOCOP = Ministry of Cooperatives; MOCUL = Ministry of Culture; MOE = Ministry of Education; MOEP = Ministry of Electric Power; MOECF = Ministry of Environmental Conservation and Forestry; MOFR = Ministry of Finance and Revenue; MOHA = Ministry of Home Affairs; MOHT = Ministry of Hotels and Tourism; MOI = Ministry Of Industry; MOIN = Ministry of Information; MOIP = Ministry of Immigration and Population; MOLES = Ministry of Labour, Employment and Social Security; MONPED = Ministry of National Planning and Economic Development; MORA = Ministry of Religious Affairs; MORT = Ministry of Rail Transport; MOST = Ministry of Science and Technology; MOSWRR = Ministry of Social Welfare, Relief and Resettlement; MOT = Ministry of Transport; MTF = Myanmar Tourism Federation; UAGO = Union Attorney General's Office. Source: Adapted from Myanmar Responsible Tourism Policy.

Source: Myanmar Tourism Master Plan

3. Centre level interviews

Table 3 contains: (a) the ministries contacted as part of this study, (b) the tourism-related questions and lines of enquiry pursued with each ministry, and (c) summarised notes of the responses and discussions with each ministry. The table also includes the lines of enquiry proposed to ministries that were subsequently unable to meet.

Table 3: Lines of enquiry and summary discussion notes from interviews with ministries in Nay Pyi Taw

Ministries	Lines of Enquiry	Summary of Discussion Notes
Agriculture and Irrigation	<ul style="list-style-type: none"> • Has consideration been given to linking the agricultural and tourism sectors, in terms of growing the supply of agricultural products to the tourism sector, and thus increasing farming incomes? • Are there any projects related to the supply of agricultural products to tourism markets or destinations? If yes, what & where? • Has consideration been given to growing organic produce near to tourism destinations as a means of supplying local restaurants to increase the value of farm/ agricultural products? • Are any agri-tourism pilot projects being designed or implemented? 	<ul style="list-style-type: none"> • Hybrid rice is promoted to increase yields but requires considerable use of fertilizers. • The Department of Agriculture in Taunggyi is trying to reduce farmer dependency on fertilizers, and convert to organic approaches. • Development partners in Inle Lake are supporting agricultural sector & tourism-related linkages – research indicates greater emphasis is needed on extension work with local farmers to change production methods. • There are very few government-supported organic farm models. • There is interest in promoting ecotourism in mangrove ecosystems. • MOAI universities and research institutes are interested in partnering with overseas universities for tourism and agriculture-related projects. • The following have training and awareness-raising needs: the highest levels of MOAI; the Departments of Agricultural Planning and Agricultural Research; extension workers in the field; students and university staff at Yezib University, plus other campuses (Magway, Phyu, Hmawbi, Hlegu, Aungban, Kyaukse, & Mawlamyine).
Border Affairs	<ul style="list-style-type: none"> • Does MOBA have any vocational (TVET) schools providing training in tourism-related fields (handicrafts, hospitality, cooking, etc.)? • With regard to sites of high MOBA interest, are there locations where MOBA or ethnic nationalities are prioritising tourism-related activities? 	<ul style="list-style-type: none"> • MOBA has vocational (TVET) schools delivering basic training in sewing and carpentry in 7 states where ethnic nationalities are located. • Two TVET programmes: (a) infrastructure, roads, electrification; (b) education – with three levels: <ul style="list-style-type: none"> (a) University (1 – Sagaing region, Ywar Thitkyi) (b) 8 vocational technical schools for male youth in border areas: industrial training (welding, mechanics, small machinery, plumbing, carpentry, electricians – all basic-level). 38 vocational schools for women (handicrafts & sewing) (c) 39 school-level for male youth (basic education, secondary & high school/diploma) • Tourism-related trainings have been considered, but no schools are located in areas with existing tourism markets. Handicraft projects have been trialled, but ceased due to limited market interest.

2 The discussion notes provide an outline of points discussed and should be considered as preliminary notes in need of verification. They should be viewed as rough notes of the consultant and they do not represent the views of Luxembourg Development or the MOHT.

Ministries	Lines of Enquiry	Summary of Discussion Notes
Commerce	<ul style="list-style-type: none"> • What led to the preparation of MOC's tourism export strategy? • Are any priority programmes identified in the Tourism Export Strategy being implemented by MOC? If yes, what is their status? • Which tourism-related supply chains are of highest interest to MOC? • Does MOC compile any tourism-related data? • Questionnaire responses note training needs have been identified for staff officer levels related to the Dept. of Trade Promotion & Consumer Affairs, International Trade Promotion Division. 	<ul style="list-style-type: none"> • The Ministry's Department of Trade Promotion and Consumer Affairs handles tourism matters, and has four divisions: international trade promotion; domestic trade promotion; research and technical development; trade fares. • Coffee, cashew nuts, handicrafts, rice, beans & pulses, wild seeds, rubber, wood, fisheries and textiles are all priority products (with supply chain linkages to tourism); tourism is the key service industry. • Each of the above are embraced in the National Export Strategy. Sub-sector strategies have been prepared for some, including tourism. • Quality management, logistics & warehousing, trade information and trade financing are cross-cutting themes with key work programmes linked to each of the above products and services. • The International Trade Centre has project agreements with the Ministry, which are supporting tourism planning and supply chain activity in Kayah State. • Although tourism is not an activity directly supported by the Ministry, "Units" have been formed within the Ministry to support product promotion. One of these is dedicated to tourism, with 3 people based in NPT and 2 people in Yangon that would benefit from tourism industry training and awareness-raising. • The Trade Promotion and Consumer Affairs Department have a strong interest in developing and promoting MICE tourism, and would welcome training in this activity.
Cooperatives	<ul style="list-style-type: none"> • Does MOCOP have any vocational (TVET) schools providing tourism-related training (weaving, souvenirs, lacquer-ware)? • From the introductory questionnaire, the Department of Small Scale Industries has identified a need for "tourism-related trainings in "design and product development"; knowledge sharing with tour guides; training of trainers for teaching staff." Please explain. 	<ul style="list-style-type: none"> • Unable to secure a meeting with the Department of Small Scale Industries – key focal point unavailable.
Culture	<ul style="list-style-type: none"> • Where and how does tourism feature in Ministry work plans? • Which offices or departments have tourism-related roles and responsibilities? • Does the Ministry compile tourism-related data for visitor numbers to key cultural sites? • Does the Ministry undertake any tourism-related research? • Is the tourism sector well understood by key Ministry staff – are there tourism-related training needs? 	<ul style="list-style-type: none"> • The Ministry has three departments: 1. Fine Arts (music, paintings and university management); 2. Historical Research (ethnic nationalities) & National Library; 3. Ancient Research (embraces UNESCO sites). • Each Department undertakes tourism-related work, and each has a variety of tourism-related training needs at all levels, especially at the site and destination level. Some scheme is required to systematically assess these needs, especially with regard to: museum management; visitor management and site planning; interpretation; and event management. Training needs assessments and awareness-raising on culture and tourism issues should initially be targeted at senior managers at the centre-level, senior managers in states/regions with primary tourism assets, and key staff in each of the primary destinations. • While visitor-related data is collected for heritage sites by the Historical Research Department, technical assistance is needed to both strengthen collection, storage and retrieval methods and expand the range of visitor-related information that is collected.

Ministries	Lines of Enquiry	Summary of Discussion Notes
Education	<ul style="list-style-type: none"> • Please describe the departments within the MOE, and identify those relevant to the tourism agenda. • Are any tourism/hospitality-related courses offered through the current school curriculum (home economics, geography, business, culture)? • Are there plans to introduce tourism/hospitality-related subjects into the school curriculum? • Two universities offer a tourism BA. Are you aware of plans for other colleges or universities to introduce tourism/hospitality courses and programmes? • Does the ministry use labour forecast surveys to determine what is taught in schools, colleges & universities? • Is there a need to provide tourism industry knowledge to MOE staff? If yes, who & where?? • Is there a need to provide training for school teachers or college/university lecturers in tourism? 	<ul style="list-style-type: none"> • MOE has nine departments. Those relevant to the tourism agenda likely include Basic Education, Teacher Training, Human Resources and Education Planning, Educational Research, Higher Education, and TVET. • Tourism is in the school curriculum. Minor topics include where tourists go and why, but it does not constitute a subject. JICA (primary) & ADB (lower & upper secondary) are assisting with the design of new curriculums, which may be approved in 2016; tourism not included as a subject. • If there's a desire to include tourism in the school curriculum, a meeting can be arranged with the MOE's curriculum committee team in Yangon, under the Educational Research Department. • Higher education: universities will have greater autonomy in the future, and can decide for themselves if they want to include tourism-related subjects or courses. • MOE staff training in tourism: some staff attend tourism-related meetings and workshops; there is a need for some form of training needs assessment for the Educational Research, Higher Education and TVET departments; there is also a need to raise the awareness of key MOE staff in the states and regions of the significance of the tourism industry. • Teacher training: most important is to get tourism in the curriculum framework. Once in, the MOE and other development partners would focus on training teachers.
Electric Power	<ul style="list-style-type: none"> • Tourism destinations need electricity to establish themselves as viable and internationally competitive destinations – do MOEP strategic plans for strengthening Myanmar's electricity supply embrace or have implications for primary and secondary tourism destinations? • Do tourism-related issues, activities or priorities feature in any of the MOEP work plans? 	<ul style="list-style-type: none"> • Unavailable for meeting. • While tourism-related electricity supply is a difficult issue to discuss at the centre-level, its importance at the destination level in terms of delivering quality services at a reasonable or competitive price was raised in each state/regional visit. Private sector stakeholders in each location raised the critical need for accurate information on electricity supply issues to assist with planning and promotion activities, which could 'make or break' a successful business.
Environmental Conservation and Forestry	<ul style="list-style-type: none"> • Ecotourism & nature-based tourism are priority areas for MOECAAF, and NWCD is the department responsible for this agenda. • What are the tourism-related HRD priorities within MOECAAF (policy, planning and management levels) to facilitate the implementation of the MEPMS and any wider tourism agendas? • What are the HR needs of the NWCD to facilitate the implementation of the MEPMS? (Introductory questionnaire identified assistant director, staff officer, range officer, ranger and forest guard positions as staff positions needing tourism-related training.) 	<ul style="list-style-type: none"> • There are considerable tourism-related HRD issues and needs from the MOECAAF perspective. • At the centre-level, some form of training needs assessment is required. • Specific assessments for understanding and promoting nature-based and ecotourism should be considered for senior managers and officers at the centre-level – requests were also made to embed an understanding of cultural tourism issues. • Support is needed at the centre-level to determine next steps with, and implementation of, the MEPMS's Ecotourism Partnerships Framework, and to establish a team of ecotourism planners. • Support also needed for the decentralisation process. There's an urgent need for tourism training and awareness-raising among MOECAAF staff at the state/regional government level. • Study tours: multi-disciplinary, high level tours for Chief Minister, MPs, Chairman of state parliament, and heads of local cabinet to raise understanding of protected areas and of the special relationship and priorities for tourism and protected areas.

Ministries	Lines of Enquiry	Summary of Discussion Notes
		<ul style="list-style-type: none"> • Training in ecotourism planning for wardens and senior management – site by site basis. • At the destination level, strong emphasis being given to tourism issues and community participation in Inle, Lampi & Indawgyi; park rangers being trained; need additional training for communities embracing tourism awareness, codes of conduct, importance of wildlife; HR training needed not just for MOECAF staff and people inside parks, but also people around parks not aware of ecotourism and relationship to conservation. • Need to promote eco/organic farming methods in & around PAs. • German development partners are preparing management plans for Indawgyi, Natmataung and other ASEAN parks; support needed for these priority PAs to promote better coordination between government departments; need to focus upon practical management & implementation, create ecotourism models. • Forest plan covers 68 districts, but lacking HR to implement. There are too few training programmes/schools. • May also be beneficial to consider awareness-raising on significance of tourism and PAs at senior-most government level, including TDCC and possibly President's office? • Public awareness-raising campaign for civil society (waste management & respect for sites)?
Finance and Revenue	<ul style="list-style-type: none"> • Which departments within the ministry are relevant to the tourism development agenda? • How does MOFR currently view the tourism sector – are there any specific challenges? • How does the ministry make decisions on budget allocations to the tourism sector? • Does MOFR collate any tourism-related data? • Does MOFR need better tourism-related data to better inform budget allocation decisions? • Is the tourism sector sufficiently understood by MOFR staff? Do ministry staff have any tourism-related training needs? 	<ul style="list-style-type: none"> • The Ministry has thirteen departments. Two are relevant to the tourism sector, namely the Budget and Internal Revenue Departments. The former allocates budgets to ministries for tourism planning and management-related activities, the latter monitors and raises revenues from sector investment and spending. • Each ministry develops a budget plan to submit to the Ministry of Finance. Budgets are allocated in the context of a medium-term financial framework and macro-economic indicators, which are used to allocate budget ceilings. • Budgets to most ministry branch offices are received through Union Government allocations to each ministry, rather than through a state/regional government process. State/regional governments also receive budget allocations from the Union Government. • In terms of implementing key objectives and actions of the MTMP & HRDSAP, responsibility for budget allocation rests with the appropriate line ministries and their submission of budgets to the Ministry of Finance. • There are no obvious tourism-related training or awareness needs among Ministry of Finance personnel. • The Budget department does not collate any tourism-related data.

Ministries	Lines of Enquiry	Summary of Discussion Notes
Foreign Affairs	<ul style="list-style-type: none"> • In how many countries does MOFA deliver tourism-related visa services? • Does MOFA engage in any tourism-related marketing and promotion activities? • Does MOFA collate any tourism-related data? • MOFA is responsible for foreign relations, including Myanmar’s international image and standing – to what extent does MOFA consider and embrace tourism as a component of the country’s image abroad? • To what extent is the tourism sector considered an area of work or interest of MOFA – do ministry staff have any tourism-related training needs? If yes, who/where? • Does MOFA engage in discussions with development partners to attract development support for the tourism sector? 	<ul style="list-style-type: none"> • Unavailable for meeting. No priority issues at this time.
Home Affairs	<ul style="list-style-type: none"> • Does MOHA have tourism-related responsibilities beyond Tourist Police & visitor security-related issues? • Does MOHA collect any tourism-related data? • To what extent does MOHA engage in the “child-wise” agenda? Please share details of work programmes underway. • Tourist Police Dept. have suggested “tourism-related high quality security management trainings” are needed as well as language training for officers and staff – can we discuss? 	<ul style="list-style-type: none"> • The Tourist Police Department was formed on 14th Feb 2013; it was previously part of the regular police, but today is more disciplined with formal procedures; 2011 political reforms led to more visitor arrivals, accompanied by a recognised need to help tourists and resolve tourist complaints; the Ministry of Home Affairs serves as the headquarters of the Tourist Police; under their command are units and sub-units in each state/region except Kachin (Yangon, Mandalay, Bagan, Taunggyi & other heritage sites have main offices, with sub-units else where); key purpose is to assist tourists. • The Tourist Police currently has some 88 high-level officials and 298 officers below the rank of 2nd lieutenant (a total of 386 officers today, up from 200 when first formed). It has a remit to recruit a total staff of 805, so currently has half the number of officers needed. MOHA has a plan to recruit more officers in the coming years. • Officers are recruited from the regular police, mostly university graduates; one month’s training provided in Yangon, which has previously included: MOHT tour guide training to understand roles of tour guides and industry -related issues; English training for one month; training courses designed internally; English is an ongoing training need; also have Japanese, Chinese and Thai language training needs. • Main strategy to retain staff is through promotion– there are issues related to staff retention. • Common issues dealt with include: tourists want information on how to get to a location or to know where toilets are; cycle/motorbike accidents; lost items; visitor complaints. • Need data on visitor arrivals to the destinations to know where to send staff.

Ministries	Lines of Enquiry	Summary of Discussion Notes
Immigration and Population	<ul style="list-style-type: none"> • Does MOIP have a progressive agenda to expand the availability of the e-visa service and include entry via land borders? • MOIP collects tourism-related data. Are there any plans to improve arrivals data collection procedures? Is MOIP open to revising the arrivals/departure card? • Is the tourism sector well understood by MOIP staff? Do ministry staff have any tourism-related training needs? If yes, who/where? 	<ul style="list-style-type: none"> • E-visa system will be used for border arrivals, but nothing imminent expected. MOIP staff require trainings to manage border entry processes, language training included. • It is likely that Tachilek, Kawthaung, Myawaddy & Htekhee (Dawei) will be the first four border entry points to receive visitors with the e-visa approval.
Labour, Employment and Social Security	<ul style="list-style-type: none"> • What is the status of employment laws, rules and regulations that relate to the tourism sector? • Does MOLES have any priorities/special interests/work programmes that are focused upon the tourism sector, as a major employer? • Please explain about the NSSA tourism and hospitality sub-committee (members, issues, priorities). • Tourism-related employers are concerned about the employment law and how it may be applied to the sector, including how it affects seasonality issues and weekend work. Are there issues in the law's formulation and industry consultation? • What is MOLES doing to promote decent jobs and employment in the tourism sector? Are there vocational training priorities/issues? • Is the tourism sector well understood by MOLES staff – do ministry staff have any tourism-related training needs? If yes, who/where? • Are there any concerns about negative employment issues or bad practices related to the tourism sector & workers' rights? • How relevant is tourism to your state/regional offices – does it surface as an issue? 	<ul style="list-style-type: none"> • Drafted Employment and Skills Development Law in 2013 (re-working 1951 Employment Registration Act); work underway to finalise and amend as needed, including for the tourism sector. • MOLES issues work permits for foreigners entering the country, there are many tourism-related workers among these. There is a need to assess the demand for expatriate workers and MOLES would welcome technical support in this area. • Any employer of domestic or international labour must register with the MOLES township/local office. Licenses are issued giving permission to be an employer, and this data is used for employment statistics. MOLES does not currently have sufficient HR resources or systems in place to manage this process at the township/local level; businesses may avoid paying tax as a result; law enforcement is an important consideration for the HRDSAP. • The NSSA is chaired by a Deputy Minister, with 15 sub-committees, including Hotels & Tourism, which may split into two; NSSA meets once per month as a higher authority; sub-committees meet on a regular basis as per need; 25 occupations being fast-tracked; current focus upon bell boy, housekeeping, waiter & room attendant; tour guide; being supported by ILO. • MOLES has staff skill/experience shortages. A training needs assessment is needed for the Department of Labour's Skills Development Division (skills assessment criteria & training assessors); need to train staff in issues related to tourism curriculum, procedures and content. Staff are not always familiar with the tourism industry (types of jobs, products, skill needs) or how to develop job profiles to attract employees into the industry. Training also needed by MOLES's Employment Division staff at the state/regional level to implement laws and regulations. • Assistance is needed to collate and process tourism-related data, not least to prevent bad practice.

Ministries	Lines of Enquiry	Summary of Discussion Notes
National Planning and Economic Development	<ul style="list-style-type: none"> • How does MONPED currently view the tourism sector? How important is it? • Does the tourism sector present any specific challenges? • Does MONPED have an interest in promoting and facilitating integrated tourism planning? • Are there any staff/offices within MONPED that have special responsibility for the tourism sector? • Is the tourism sector well understood by MONPED staff – do ministry staff have any tourism-related training needs? If yes, who/where? • How relevant is tourism to your state/regional offices – does it surface as an issue? 	<ul style="list-style-type: none"> • Tourism a major employer, income generator and cross sector activity but a difficult activity to coordinate, and there's a need to strengthen tourism planning, coordination and cooperation across government ministries. • No record of graduates from private schools in hospitality sector; no record of numbers with certificates/trained. • Training needs assessment required within the Planning Department at the centre and state/regional levels to deliver knowledge of: <ul style="list-style-type: none"> o National and destination planning examples from comparable/regional destinations (lessons of good and bad practice needed, together with a better understanding of tourism linkages to other economic sectors including agriculture and handicrafts) o Data collection methods to profile visitor expenditure, including credit card spending o Tourism satellite accounting processes o How to profile visitor movements around the country o Visitor markets, length of stay and spending: need to disaggregate arrivals by visitor types including business, leisure, and professionals working in-country
Religious Affairs	<ul style="list-style-type: none"> • Does international and domestic tourism feature in the work programmes of MORA? • Does MORA have responsibilities for managing sites of high importance to the tourism sector? If yes, which are the 20 most important? • Does MORA collect any tourism-related data? • The short questionnaire states language training is needed – who needs this and why? • Is the tourism sector well understood by MORA staff – do ministry staff have any tourism-related training needs? If yes, who/where? 	<ul style="list-style-type: none"> • Ministry roles include overseeing: monastic education; religious affairs; any conflicts that emerge between civil society & monks. State monk committees are elected and the ministry supports their work plans. • The ministry facilitates movements of dignitaries and special tourists to pilgrimage sites, providing gratis entry to sites. • Since 2013, site level trustee boards have been elected by local monks and regional government to manage site affairs. The State Minister's office has authority over the board of trustees. The ministry also oversees the boards. • Three types of pagodas: state level (Shwedagon, Kyaikhto, Mandalay), regional-level (includes Inle), and township. • Training needs are mainly at the site-level: language training (board of trustees and their employees); site guide training; site management planning support for boards of trustees. • No roles or responsibilities related to festivals. • Domestic pilgrimage issues: waste management & visitor movements – awareness-raising campaigns.

Ministries	Lines of Enquiry	Summary of Discussion Notes
Rail Transport	<ul style="list-style-type: none"> • MORT operates a sight-seeing train at Goteik Bridge, Shan state – what measures are being taken to develop and promote this attraction? Numbers? • Are there any other train routes of tourism importance? • Are there any other tourism-related services offered by MORT? • Does MORT collect any tourism-related data? • Which are the ten most important/popular train routes in Myanmar? • Tourism-related training has been requested by MORT – can we discuss? • MORT issues road transport licenses including taxis & driver training. Are there any tourism-specific issues or challenges? 	<ul style="list-style-type: none"> • The ministry has four departments: ministry office; road transport admin; Myanmar railway; central (training) institute of transport and communication. • MORT issues commercial vehicle licenses for tourist transportation (blue plates). Assistance is needed to expedite licensing procedures. • Goteik bridge built in 1903. 2,260 feet long. 5,000 kyat sightseeing tour. 20 people per coach (1 lak for coach hire). 3 hour journey. A development plan has been prepared, 2 companies bidding for EOI to prepare a re-build and operation plan. • A steam train operates between Nay Pyi Taw and Bagan, but needs investment otherwise it will be gone within a year. • The Yangon-Mandalay railway is being upgraded with a Japanese loan. 2025 is the target completion date. • A Mandalay city railway is planned for 2030. • The Yangon circular line is 48km with 11 stops. An upgrade is being considered and the line may be elevated.
Science and Technology	<ul style="list-style-type: none"> • Does MOST’s mandate to “carry out research and development for the improvement of the national economy” include any tourism-related research? • Does MOST collect any tourism-related data, or is it interested and able to assist with the compilation of any tourism-related data? • Does MOST have any vocational (TVET) schools providing training in tourism-related fields? • Is there any interest in developing HR to assist with the tourism sector? 	<ul style="list-style-type: none"> • Two relevant departments: Department of Technical Promotion & Department of Technical Vocational Training. The former embraces the development of mobile application software, the latter 26 universities in the states/regions. Samsung have linkages to the universities and sponsor an annual software competition – could link to the tourism sector? (List of relevant universities included as Annex B.) • No data collected or tourism-related programmes at present – but could be interested to assist. Universities in states and regions could look at tourism-related projects, including building destination management data-bases. Briefings needed on types of support processes and linkages that might be developed.
Social Welfare, Relief and Resettlement	<ul style="list-style-type: none"> • Does MOSWRR operate any tourism-related vocational training schools (weaving, handicrafts, cooking, hospitality)? If yes, where? • Does MOSWRR operate any vocational schools in or close to tourism destinations? • Is the tourism sector understood by MOSWRR staff – do ministry staff have any tourism-related training needs? If yes, who/where? 	<ul style="list-style-type: none"> • Unavailable for meeting. No substantive linkages reported.

Ministries	Lines of Enquiry	Summary of Discussion Notes
Transport	<ul style="list-style-type: none"> • How is tourism planning embraced in MOT's work programmes? • What are the tourism-related priorities of the MOT? • To what extent does tourism feature in the national transport strategy? • What significant road/rail/airport building programmes are planned – latest on Bago/Hantawaddy? • Does MOT collect any tourism-related data? 	<ul style="list-style-type: none"> • National Transport Master Plan supported by JICA in place, which has road, rail, aviation and maritime components; developed as a corridor-based infrastructure approach; places emphasis upon Mandalay, Nay Pyi Taw, Yangon, and strategic sites; acknowledges importance of transport linkages for agro-industrial centres but not tourism destinations (such as Bagan as a primary destination, Mrauk-U as secondary destination, or Myeik or Kawthaung as emerging destinations); little acknowledgement of tourism sector, no sector specific treatment. • Construction of Bago/Hantawaddy international airport in progress, but no clear completion date. • Would benefit from some form of tourism industry awareness training for key staff, but unclear who or how to proceed. • No specific tourism-related data collected.
Union Attorney General's Office	<ul style="list-style-type: none"> • Where do tourism-related agendas feature in the work programmes of the UAGO? What is the status of approving the new Tourism Law? • Is the tourism sector well understood by UAGO staff – do staff have any tourism-related training needs? If yes, who/where? 	<ul style="list-style-type: none"> • Unavailable for meeting. Not a priority at this time.

4. STATE/ REGION INTERVIEWS

Tourism features as an economic activity of primary importance to the two states and one region included in the interview programme. In cabinet-level interviews, agriculture was cited as the most important economic activity in each of the states/region, together with agricultural-related industrialisation and, in Rakhine, fisheries production. Overall, tourism is positioned among the three most important economic sectors, with each government keen to significantly expand tourism activity throughout the state/region and in so doing attract inward investment, visitor growth and employment opportunities. Table 4 illustrates the growth in hotel and room numbers in key destinations in each state/region between 2013 and 2015, and Table 5 the growth in visitor arrivals over the same period. While the data indicates consistent growth, with higher growth rates in Mandalay and Shan (the highest trends highlighted in red), no data is available to profile the corresponding increase in tourism-related employment in these destinations over this period.

Table 4: Growth in hotels and hotel rooms in Mandalay, Rakhine and Shan between 2013 and 2015

Destination	2013		2014		2015	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
Mandalay						
Bagan	77	2,386	77	2,484	78	2,565
Mandalay	104	4,439	142	5,809	168	6,788
Pyin Oo Lwin	42	836	44	933	50	1,084
Rakhine						
Mrauk U	6	149	6	149	6	149
Ngapali	22	790	23	826	25	863
Sittwe	5	109	7	142	8	172
Shan						
Kyaington	14	442	15	505	14	448
Laisho	12	412	15	502	15	510
Loikaw	7	135	8	175	9	201
Nyaung Shwe	47	1,277	66	2,004	78	2,438
Pindaya	5	166	5	166	6	177
Tachileik	23	1,013	25	1,135	35	1,669
Taunggyi	22	646	24	676	31	864
Thipaw	5	94	7	163	12	255

Source: MOHT

Table 5: Growth in international visitors to Mandalay, Rakhine and Shan between 2013 and 2015

State/Region	2013	2014	2015
Mandalay	219,518	242,446	306,432
Rakhine	5,788	8,272	9,881
Shan	63,291	129,655	213,082

Source: MOHT

4.1 Tourism governance and planning

None of the three areas have formed state/regional-level tourism councils as prescribed in the MTMP. While aspects of the tourism system are discussed at the cabinet-level (including, for example, issues surrounding entry fees to Bagan and Inle Lake, hotel zones and transport infrastructure), dialogue appears to be project or issue driven, is lacking in terms of strategic content and direction, and doesn't embrace regular consultation with the private sector. Nevertheless, the need to establish some form of tourism committee at this level is appreciated. In some cases efforts have been taken in this direction³, yet five principle factors undermine measurable progress:

- A lack of tourism industry (or system) knowledge and exposure among elected officials at the highest levels of state/regional government

³ In Taunggyi/Nyaung Shwe monthly meetings are convened between MOHT branch office and the private sector associations. In Mandalay a Tourism Supervisory Committee was established in 2013 and two meetings have since been held, a lack of budget to implement actions is cited as the reason for limited activity.

- A lack of general and technical tourism planning and management skills, and experience among government officers
- A reliance on the Union Government for carrying forward development programmes
- A lack of clarity regarding the extent of remits and the specific roles and responsibilities of destination, state/regional and Union Government planning and management bodies
- No systems or processes in place at the state/regional or Union levels to finance state/regional level work programmes

In terms of HR priorities, there is a recognised need to deliver industry trainings (hotel management, hospitality, restaurant and tour guide) to improve product and service quality. All state/regional consultations placed the highest emphasis on this need, requesting additional and urgent support in this area. Less well recognised is the need for assistance with state/regional tourism planning and the formation of tourism councils or DMOs. In general terms, while there is little or no concept of the role or function of these bodies, there is keen interest to learn about them and a willingness to see how tourism planning and coordination approaches can be strengthened. Following short presentations on the basic functions of DMOs, there was appreciation by cabinet ministers and MOHT branch officers of the need to form DMOs in primary, secondary and emerging destinations.

While the possibility of receiving toolkits to guide the creation and work-plans of DMOs was welcomed, the lack of knowledge of so many aspects of tourism planning environments firmly suggests that guidance to facilitate and inform responsible tourism planning processes would be critical to success. Despite significant criticism at the local and national level from many stakeholders there continues, for example, to be high interest in a hotel zone investment approach.⁴ This is despite the Inle and Mandalay zones being unable to attract the envisaged investors and developers and on-going media and industry criticism of this approach.⁵ Contrasts in visitor numbers to the three states/regions, along with interviews in Taunggyi, Mandalay, Sittwe and Mrauk-Oo, suggest that the ability of destination-level stakeholders to organise themselves, identify and prioritise work programmes varies considerably between destinations. In Shan State there was a specific request for information to help evaluate the merits of 'casino tourism' and assist with the screening of proposals. On the subject of entry fees to tourism destinations, including Bagan, Inle, and Mrauk-Oo, there is some frustration that the money simply 'disappears' into the state/region's treasury, rather than being targeted towards tourism-related needs such as improved litter and waste management and industry trainings to improve product and service quality. A number of stakeholders suggested that tourists paying the entry fee should also be advised as to how their entry fee money is being spent, as greater transparency would increase visitor satisfaction.

In some locations there is evidence of meeting fatigue among the private sector. Industry stakeholders regularly attend various development partner workshops to share knowledge, offer views and opinions and contribute towards sector work-plans, but there is a growing impression that good intentions have yet to translate into noticeable change on the ground.

4 See, for example, the MCRB's Tourism Sector-wide Impact Assessment.

5 While 93 businesses have bought land in Inle's 600 acre hotel zone, only 5 hotels are currently under construction and local speculation suggests an alternative land-use needs to be found for the site.

5. ISSUES

As depicted in Table 2, the roles of government in tourism planning and management are many and varied, extending from delivering efficient investment processes to gathering a variety of visitor economy data and from activities to prevent the exploitation of children, women and ethnic people to efficient use of energy and water by accommodation and tour operation providers. A wide variety of policies, laws and related procedures influence these and other governance areas, and global experience confirms policy and legal processes across government ministries are not always well aligned, and may even conflict with one another in the tourism development arena. Coordination across government ministries and departments is therefore critical in terms of promoting a whole of government approach to tourism development.

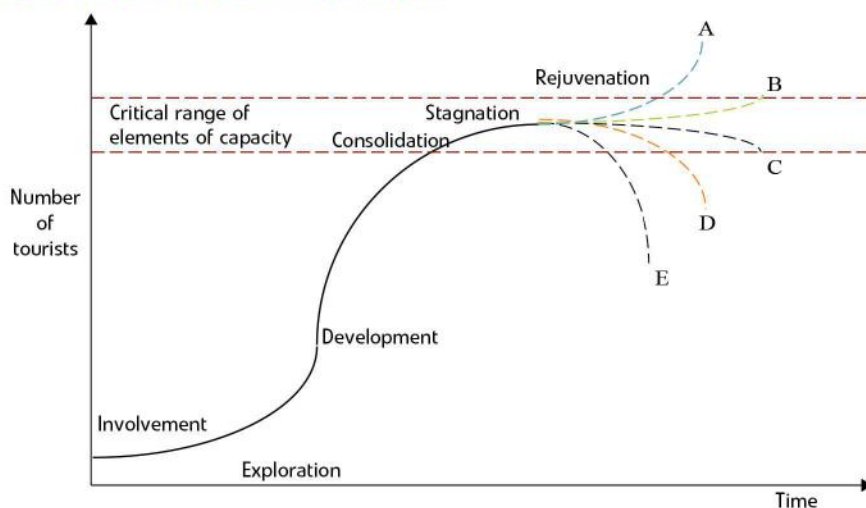
Whilst the TDCC has been formed at the highest level of government to promote strategic and integrated development of the sector, and an unofficial translation of the Committee's roles and responsibilities is attached as Annex C, no information was available on the frequency, agenda or minutes of the Committee's meetings. It is therefore not possible to comment on the extent to which the Committee and its members might benefit from some form of strategic advice and guidance in its work (as envisaged and recommended in the MTMP). Nevertheless, given the critical role and responsibilities of the Committee and its likely review as a result of the recent change in government, a recommendation is included in the section below to review the roles and responsibilities of the TDCC and to conduct a skills and knowledge audit of the Committee's members.

Turning to governance issues below the TDCC, there are a series of obstacles that combine to hamper a whole of government approach to tourism development. A common issue currently experienced by all ministries, and partly linked to ongoing changes, is a shortage of skilled and experienced staff to cope with new agendas and work programmes. All ministries interviewed are adjusting to major policy changes to promote, for example, market-oriented investment, employment, social change, and adaptation to international laws, norms and conventions. Strategic plans are in various stages of design and implementation across all ministries. Thus a wide variety of new demands are placed upon staff at all levels to carry work programmes forward, often at a pace that surpasses the number of staff available or that exceeds current skill sets. A pertinent factor in this regard is the move away from state-owned enterprises. In previous years, most ministries ran state enterprises: it was not unusual for ministries to employ more staff to manage these enterprises than were employed to manage governance-related responsibilities. As part of the reform process, staff that were responsible for managing state enterprises are now responsible for governance programmes (policy, planning and administration duties), yet lack relevant skills or experience in this arena. Hence there's a widespread need for a variety of training and new knowledge across all government departments, and at all levels of government.

International tourism is a relatively new industry to Myanmar and, with international visitor numbers not exceeding one million arrivals until 2013, there is limited experience of destination management at the site and state/regional levels.⁶ This lack of exposure to tourism markets and destination management partly explains why state or regional tourism councils, and destination management organisations, have yet to be formed. Another factor is an ingrained centralised approach to national development, with the Union Government directing the great majority of state and regional development programmes. As a result, there is a lack of human resources and technical knowledge with regards both the formation of DMOs and understanding of what a DMO's role, remit and work plan would look like. While governance tools and processes to plan and manage tourism are rarely obvious or straightforward, they are linked to what has been called the destination life-cycle (illustrated in Figure 1). As destinations grow, management intervention becomes increasingly important to steer developments along a desired path. The theory also suggests that undesirable consequences will occur where management is weak. It can be argued that the sooner stakeholders form a DMO, the sooner integrated management tools can be developed and applied, and the greater the opportunity to promote forms of responsible tourism geared towards poverty alleviation and to avoid unnecessary and irresponsible impacts. The following paragraphs summarise tourism planning considerations that confront DMOs and, from a governance perspective, policy instruments and tools to direct and manage the tourism system.

⁶ Pilgrimage tourism and destination management is a notable exception, with sites such as Kyaikhto having received hundreds of thousands of tourists per year for several years. While some sophisticated management techniques are employed at this site, many aspects fall below international standards and expectations in terms of waste management, water management, interpretation, building controls and public transport.

Figure 1: Butler's Destination Life-cycle



- A - Successful redevelopment leading to renewed growth and expansion
- B - Minor modifications which may include the protection of existing resources and price increases
- C - Some readjustment to meet existing demand which may include an increase in visitor prices to prevent further growth
- D - Over use of resources leading to destination decline largely as a result of competition with other a
- E - War, politics or some other catastrophe halting tourism altogether

(Source: Butler, 1980)

As tourism is a multi-faceted and pervasive industry with many social, economic and environmental consequences, a range of planning approaches are embraced in destination management frameworks. Most planning considerations are captured in Figure 2, which serves to illustrate both the complexities of tourism planning and the steps and processes which must be considered when preparing detailed destination management plans. While most destination management plans should review and assess the themes identified under the “survey” column in Figure 2, the extent and depth of analysis will vary from one planning project to the next and will be influenced by: (a) the finances available to fund a destination plan, (b) the technical skills of the team designing the plan, (c) the time available to prepare the plan, and (d) destination characteristics such as visitor numbers, site importance and severity of site impacts.

Turning to policy instruments and management tools that can be deployed to shape and direct tourism growth and impact management, four categories of instruments can be defined, namely:

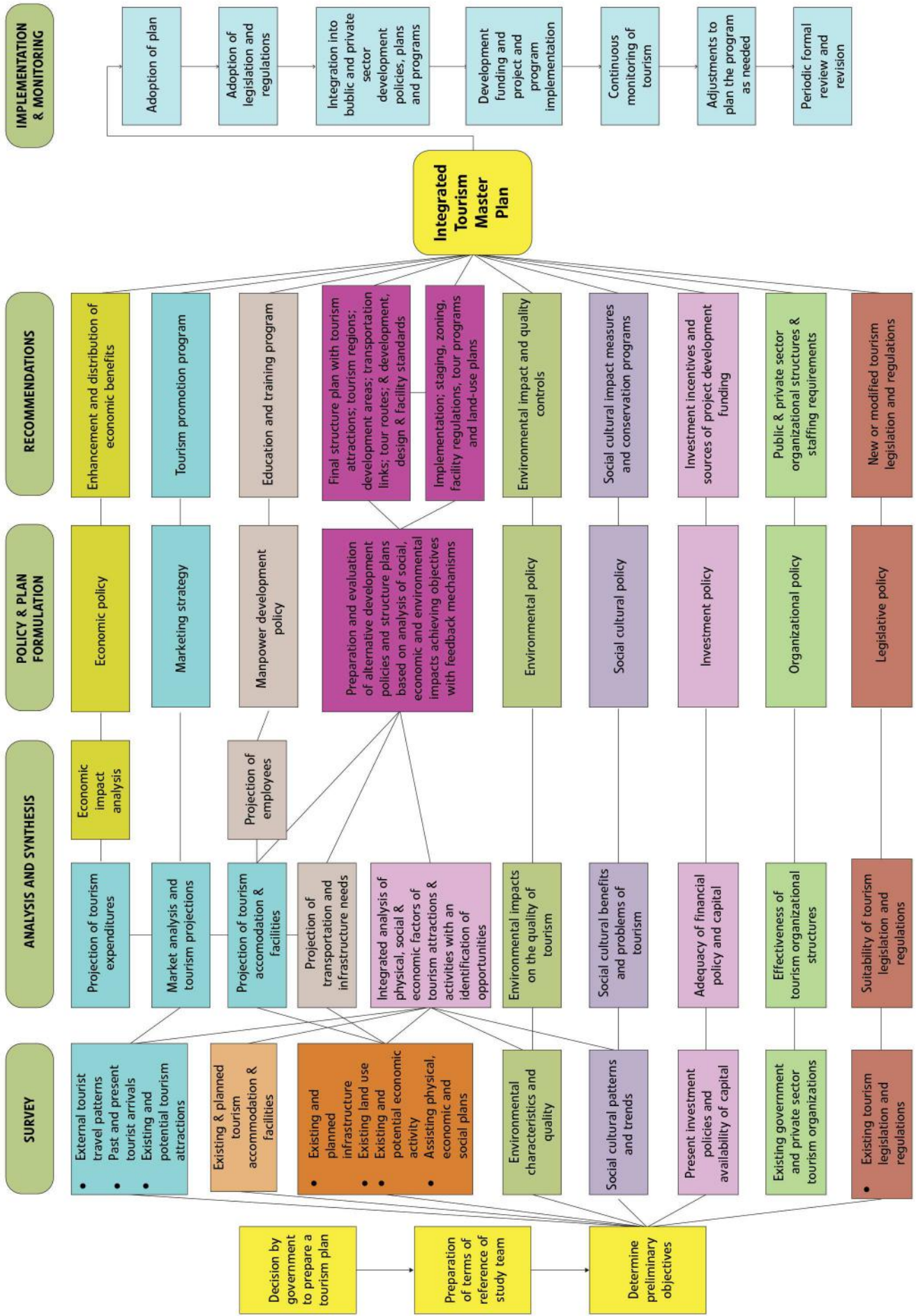
- **Advocacy:** Information and education to change behaviour
- **Money:** Subsidies, financial incentives, taxes, spending
- **Government action:** Delivering services and infrastructure
- **Law:** Deploying legislation and regulations

While the use of legislation and regulations has traditionally been used to manage tourism development, these are increasingly regarded as expensive and resource-intensive options. A general shift has therefore occurred towards facilitating and enabling private sector self-regulation and accreditation. Decisions as to which instruments should be deployed to deal with any particular development issue are generally determined by:

- 1) Where power rests to address the issue: Is it within “the market” or visitor economy, within government structures, or through civil society and groups of interested stakeholders?
- 2) What level of government involvement is appropriate: Can voluntary action solve the issue, is regulation needed, or would a mix of actions work best?

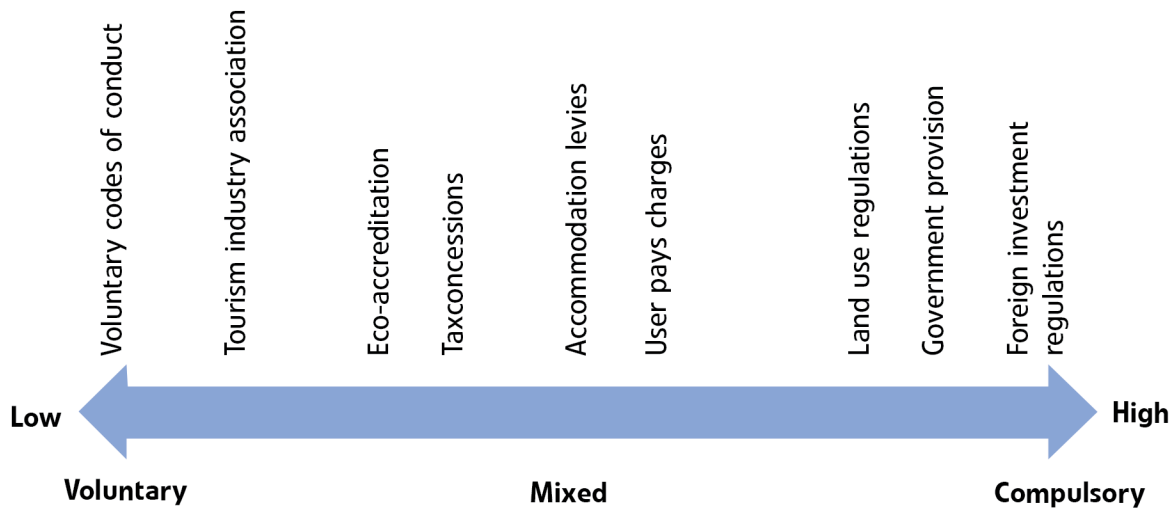
Figure 3 provides examples of different policy instruments that can be deployed to address management issues, and positions them on a continuum with voluntary instruments at one end, mixed in the middle, and compulsory regulation on the other. These examples are provided to encourage discussion and debate among Myanmar’s public and private sector stakeholders as to which type of policy instruments might be deployed by DMOs to address specific tourism management issues and priorities.

Figure 2: Scope of tourism destination planning process



Source: Inskip, E., 1991. "Tourism Planning: an integrated and sustainable development approach"

Figure 3: Levels of government involvement in tourism planning



Source: Dredge, D. & Jenkins, J. 2007. "Tourism Planning and Policy"

6. RECOMMENDATIONS

The following recommendations are provided to strengthen tourism governance throughout the country. Many are centred around the need to raise industry awareness and technical competence among government stakeholders. While tourism might be seen as one of many development priorities with awareness-raising and capacity building needs across government departments, it is somewhat distinct: consumers and investors travel to the point of production and can arrive in increasing numbers to progressively overwhelm destinations, causing growing problems for management systems, resident communities and the environment. To avoid unnecessary negative impacts and harness the industry for the benefit of the destinations and their communities, it is essential to plan, manage and regulate the sector. Starting points include raising industry awareness at a senior government level, and across government departments responsible for management interventions. Further activities are recommended to translate awareness-raising and trainings into governance actions.

(1) Review the membership, roles and responsibilities of the TDCC

It is recommended that a small team of public and private sector industry experts, with substantial proven international experience of strategic tourism planning, be appointed to (a) review the membership, roles and responsibilities of the TDCC, (b) conduct a skills and knowledge audit of TDCC members to identify both knowledge gaps and training and awareness-raising needs, and (c) make recommendations for change, establishing a learning programme to impart industry knowledge to TDCC members.

(2) High-level strategic briefings to ministries and state/regional governments

A small team of industry experts should be formed to deliver 2–3 hour briefings to senior government officials and elected members of parliament on key Myanmar tourism policy and planning issues. The team might be composed of foreign and local experts, with briefing materials adapted to the needs and interests of specific ministries and state/regional officials. The briefings should include distribution of key policies and plans in soft and hard copy, an overview of the roles and responsibilities of DMOs, and a 'Question and Answer' session recording the tourism-related needs and specific interests of the participants. The aim of the briefings is to (a) promote industry awareness among the senior-most officials at the centre and state/regional levels, (b) identify barriers to integrated tourism planning, and (c) create an enabling environment for coordination and planning across ministries, and between the centre and state/regional levels.

(3) Tourism industry awareness trainings

A small team of MOHT staff should be trained and assisted to deliver a short "introduction to the tourism industry" awareness raising course at the MOHT for technical staff from other government ministries. The course might be delivered over five half-day sessions, lasting one week, and run on a monthly, bi-monthly or quarterly basis according to demand. It would consist of a series of introductory lectures and discussion seminars, profiling: the nature of the tourism industry; types of tourists; types of tourism; positive and negative social, environmental and economic impacts; responsible tourism; gender issues; supply chain issues; destination planning and management issues; an overview of the MTMP, MRTP, MCITP, MEPMS

and HRDSAP; and case studies of destination management issues in Myanmar. It would have a number of target audiences, including centre, state/regional and branch office ministry staff from MOHT, MONREC, MOCARA, MOE, MOI, MOPAF, MOC, MOBA, and MOHA.⁷

Courses would involve discussion of planning and management issues and encourage networking, cooperation and dialogue across government ministries. A two-page A4 information leaflet, profiling the aims, content and target audiences for the trainings, should be developed and distributed, in both soft and hard copy, to all relevant ministries, key state/ regional governments, and their branch offices. The page should include contact details and an email for training registration.

(4) Tourism destination planning awareness trainings

Similar to the training programme envisaged above, but shorter, a course should be delivered by MOHT-trained staff to focus specifically on issues related to tourism destination planning and management. The course would be available to government staff that have participated in the course described above. Topics covered would include: stakeholder identification, roles, responsibilities and expectations; visitor markets; roles and responsibilities of DMOs; establishing a DMO; destination level social, environmental and economic impacts and management tools; visitor information and interpretation techniques; supply chain evaluation; case studies of key destinations in Myanmar and the region; and an overview of preparing destination management plans. The course might be delivered over three afternoons and staged every three months, or according to demand. Target audiences would be government officers from the state/regional and branch office levels. Course aims would include both instilling a general awareness of approaches to, and the need for, integrated destination planning and management, and encouraging coordination, cooperation and dialogue at the destination level. The course would serve as an awareness-raising tool for destination governments looking to initiate or strengthen destination planning systems, and also as a preparatory stepping stone to the formation of (or working with) DMOs.

(5) Toolkit for establishing a DMO

A toolkit should be prepared in English and Myanmar language to guide state/regional and destination governments through the initial steps and processes needed to establish and operationalise a DMO. The toolkit should contain a variety of materials, including PowerPoints and worksheets, to enable public and private sector stakeholders to work with each other and set in place steps to strengthen tourism planning and management processes. This would include materials on: assessing the need for a DMO; establishing and formalising a DMO; DMO governance, operation and finance issues; destination planning, management and investment tools and processes; destination marketing and research methods; and 'further reading' resources, including summary case studies and sources of additional information (<https://www.gstcouncil.org> etc.). The toolkit should be prepared by MOHT, with MOHT staff trained to guide state/regional and destination governments through the materials therein. This is a process that requires five to ten years of development partner support in the design and initial deployment of the toolkit.

(6) Tourism training needs assessments for key ministries

A small number of ministries and government departments have substantial roles in the tourism sector, including Culture and Religious Affairs, Natural Resources and Environmental Conservation, Home Affairs (including the Tourist Police Department) and Ethnic Affairs. Tourism-related training needs assessments should be undertaken with these ministries to design and deliver both tailor-made trainings for officers and staff and training resources and materials for use by these ministries in the execution of their duties. For example, MONREC would require a detailed breakdown of training needs and priorities:

- 1) For the implementation of the Ecotourism Partnerships Framework
- 2) To create a team of experts to design ecotourism management plans for protected areas
- 3) For managers and staff of priority protected areas to plan and manage ecotourism
- 4) To raise awareness among state/regional officials as to the aims and objectives of Myanmar Ecotourism
- 5) To develop community- and nature-based tourism in and around designated community forests with verified tourism potential

The extent to which such training needs are undertaken will likely depend upon individual ministries recognising the need and benefits for the training assessments, and their willingness to approach development partners to undertake an assessment.

⁷ Abbreviations for new ministries created in March 2016 are used.

(7) Activity and financial planning

It has been consistently stated throughout this report that destination governments should assume greater tourism planning and management responsibilities. For this to happen state/regional government budget allocations are needed to fund actions and activities, yet MOHT staff at the state/regional and branch office levels have limited experience in activity and financial planning. It is recommended MOHT branch office staff be trained in annual work-plan, finance and accounting procedures in accordance with accepted or emerging planning processes developed by MOPAF.

(8) Training needs assessment for gathering tourism-related data

As the MTMP makes clear, responsible and strategic tourism planning and management depends upon the collection of a variety of tourism-related data. Data is needed by the public and private sectors to understand visitor markets, arrival trends, movements around the country, and spending and investment patterns, and also to measure sector performance including employment trends and linkages to other economic sectors. This data is essential to determine where investment should be directed to reduce economic leakages, and to maximise benefits and returns to the local, state/regional and national economies. While key objective 1.3 of the MTMP recommends the creation of a Tourism Technical Authority (TTA) to “take the lead in identifying metrics and processes for performance monitoring at the national, state and regional levels”, this authority has yet to be established. Reasons for this include a lack of in-country expertise and a need for technical assistance to establish the TTA and related work programmes.

Interviews confirm a that number of government departments, and the private sector, are greatly hampered in their planning by a lack of tourism-related data. Open requests were made for assistance to set in place systems and procedures to gather better data sets. It is recommended that one or more training needs assessments be undertaken to review the availability of tourism-related data and to design trainings to strengthen data collection and analysis. An initial review and assessment should consider both the relevance and presentation of the MOHT’s annual tourism statistics and the systems and procedures needed to set in place a basic framework upon which national and state/regional tourism satellite accounts can be developed. Rather than design specific trainings to physically gather tourism-related data, the initial objective of the assessment would be to focus upon senior government officials to be appointed to the TTA, and work with them to determine what assistance and training/awareness-raising is required to establish and operationalise the TTA. Subsequent appraisals would build upon the findings of the initial study, setting out training and mentoring programmes that focus on working with key departments, or teams of technicians across key departments, to create processes that will gather priority data.

(9) Review of visitor safety and crisis management protocols and processes

In recent years Myanmar has experienced earthquakes and typhoons, and the country is vulnerable to disease outbreaks and catastrophes such as aeroplane disasters. While Key Objective 1.4 of the MTMP calls for the development of systems and protocols to deal with emergency situations, a national policy with protocols and codes of conduct to promote visitor safety has yet to be produced. To prepare for emergency situations that may directly threaten and impact the tourism sector, it is recommended that assistance be provided to review crisis management and response systems and processes as they relate to the tourism sector. In particular, the review should focus on HR training and development needs to enable senior-level tourism managers from both the public and private sectors to effectively respond to emergency situations.

(10) Research partnerships

Interviews with most ministries confirm government staff are keen to understand more about the nature of the tourism industry and the linkages the sector has to work programmes within their ministry. For example:

- MOSAT cited its 26 computer-related universities in the states and regions, its remit to promote industry-related IT development and cooperation, and its interest in engaging in destination-level tourism IT projects related to business promotion and data processing.
- MOAI cited its eight university campuses and interest in undertaking research in and around tourism destinations to strengthen agricultural linkages with the tourism sector;
- MOCUL cited an interest to understand how textiles produced by ethnic nationalities could be quality-controlled and branded as part of a national handicraft campaign.
- MOLES cited an urgent need to assess the demand for expatriate workers in the tourism sector.

8 For any country, calculating the contribution of tourism to GDP is complex and challenging. It requires economic modelling centred around a comprehensive economic database that includes detailed tourist consumption/expenditure data, sector-specific investment data, and a national accounting matrix (input-output table/social accounting matrix) highlighting the flows of economic activity.

9 Other reports undertaken as part of the HRDSAP also point to the need for better tourism-related data including Strands 2, 4, 6 and 7. Requests were also made by the Tourist Police Department to receive visitor data for primary and secondary destinations to help determine the numbers of Tourist Police to be stationed in these locations.

These and many other tourism research projects are needed to build human resource capacity to plan and manage tourism. It is recommended that MOHT develop a webpage to connect parties interested in designing and implementing tourism-related research. This might include examples such as those listed above, as well as proposals from overseas research bodies seeking to conduct tourism-related research in Myanmar. A template would be produced for interested parties to complete basic information, with key words used to allow users of the page to search for projects within their scope of interest.

(11) Produce a 90 minute film on the future of Myanmar's tourism industry-

A documentary for distribution throughout Myanmar TV channels and as DVDs from MOHT branch offices around the country should be produced. The film should focus upon the recent growth in Myanmar tourism, the positive and negative impacts associated with this growth, and ask, "What directions will future growth take?" The programme should draw upon positive and negative examples of destination development from across the regions and illustrate the importance of destination planning. It would aim to increase civil awareness of the nature and significance of the tourism sector, and encourage discussion and debate among the general public, government and private sector as to what steps local and national governments can take promote responsible tourism development.

Annex A: questionnaire to assess tourism-related training needs among government ministries, departments and divisions

You are invited to participate in this survey to strengthen and coordinate tourism industry planning and management. When answering the questions below, you may find it useful to refer to the Myanmar Tourism Master Plan, especially Table 6 (included with this questionnaire) and Annex 1, the long-term implementation framework (2013-2020) that identifies lead agencies responsible for implementing key objectives and activities.

Questionnaire completed by the Ministry of _____

Name _____ Position _____

1. Does your Ministry have clear roles and responsibilities with regard to planning and managing tourism-related activity? Yes¹ No² Not sure³

2. If your answer to question 1 is no, is there a need to better define what your ministry's tourism-related roles and responsibilities are, or should be? Yes¹ No² Not sure³

3. If your answer to question 1 is yes, please briefly describe these roles and responsibilities.

4. If your answer to question 1 is yes, which department(s) or division(s) are delegated with responsibilities to plan and manage this activity?

5. If your answer to question 1 is yes, do the officers and staff in the departments or divisions identified in question 4 have the required skill sets and experience to effectively perform their tourism-related roles and responsibilities? Yes¹ No² Not sure³

6. If your Ministry has staff involved in tourism-related activities, please identify any officer or staff positions in need of some form of tourism-related training.

7. If your Ministry has officers or staff in need of tourism-related training, please describe the types of skills, training or capacity-building that would help them perform their tasks effectively?

8. Please indicate if your ministry views tourism-related tasks as a high or low priority.

High Priority	Medium Priority	Low priority	Not a priority at this time

PLEASE COMPLETE AND EMAIL TO
Director, Training Dept., MOHT
training.dht.MOHT@gmail.com

AND INCLUDE A CC TO
Project MYA/001
MYA001@Luxdev.lu

Annex B: List of Computer Universities under MOSAT's Industrial Technology Promotion and Cooperation Department

	University Name
1	University of Computer Studies, Yangon
2	Computer University (Pyay)
3	University of Computer Studies, Mandalay
4	University of Information Technology (COE)
5	University of Computer Studies, Mandalay (COE)
6	Computer University (Myitkyina)
7	Computer University (BanMaw)
8	Computer University (Kalay)
9	Computer University (Monywa)
10	Computer University (Pakokku)
11	Computer University (Lashio)
12	Computer University (PinLon)
13	Computer University (Taunggyi)
14	Computer University (Kyaing Tone)
15	Computer University (Meiktila)
16	Computer University (Loikaw)
17	Computer University (Magway)
18	Computer University (Taunggu)
19	Computer University (Sittway)
20	Computer University (Hinthada)
21	Computer University (Maubin)
22	Computer University (Patheingyi)
23	Computer University (HpaAn)
24	Computer University (Thaton)
25	Computer University (Dawei)
26	Computer University (Myeik)
27	Myanmar Information Technology

Annex C: Unofficial Translation of the Roles and Responsibilities of the Tourism Development Central Committee

1. To develop and implement national and regional level tourism policies and master plans
2. To monitor the timely implementation of the action points in the plans
3. To seek assistance from the development partners towards the implementation of the priority projects in the tourism master plan and if required, to have their participation
4. To set up tourism monitoring group at the State and Regional level with the tasks to implement the tourism-related policies
5. To give guidance and support the submissions of the State and Regional level tourism monitoring group and the associations of the Myanmar Tourism Federation
6. To find mechanism and implementable measures to bring about increase in yearly international arrivals, national income, job opportunities
7. To strengthen the Nation Building Campaign and other promotional advertisements so as to develop destination marketing and popularise Myanmar as a tourism destination
8. To give necessary support in organising tourism development paper reading sessions, discussions, meetings and exhibitions
9. To work towards sustainability of existing tourist attractions and to develop new tourist destinations and attractions
10. To formulate a mechanism for the systematic collection of the entrance fees and to apply directives to efficiently make use of the income for responsible tourism supportive activities
11. To classify zones in the tourist destinations and to monitor improvement in the infrastructure within these zones
12. To develop Green Tourism Activities, which will harmonise environment benefits in relation to the global climate change
13. To formulate monitoring policies on the development of ecotourism, which will bring mutual benefits to the Protected Areas
14. To develop tourism infrastructure as the government plan and make attempts to seek support from the international organisations
15. To include tourism as main component in the national level transportation strategy
16. To review and amend the Myanmar Hotel and Tourism Law and the Procedures to the Law in accordance to the changing trends
17. To set up Tourism Police Force in the tourist destinations as tourism develops
18. To give guidelines for the systematic development of basic tourism businesses such as hotel, tour guiding, transportation, souvenir production and selling, health care, money exchange
19. To administer tourism human resource development from the level of tourism vocational trainings to higher education level
20. To ensure protection and conservation of the environment and culture heritage from tourism impacts, and that no social and economic issues arise
21. To research and assess destination carrying capacities
22. To have accurate data on the tourism multiplier effect, development of living standards, reduction of poverty
23. To approve in accordance with the rules and regulations for the systematic development of outbound tourism operated by tourism agencies
24. To ensure the systematic development of domestic tourism
25. To set up sub committees, if needed by the Committee



MYANMAR-LUXEMBOURG



DEVELOPMENT COOPERATION

