

ミャンマー国

商業省貿易振興・消費者局

ミャンマー国

貿易振興体制情報収集・確認調査

最終報告書

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独立行政法人 国際協力機構 (JICA)

株式会社コーエイ総合研究所

写 真



商業省本省（ネピドー）



商業省ヤンゴン事務所



商業省とのキックオフ会合



ドナー調整会議



ASEAN 視察調査



貿易振興研修



国際ビジネス研修



ドラフトファイナルレポート報告会

ミャンマー国貿易振興体制情報収集・確認調査

最終報告書

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1. 本業務の概要

1.1 背景

ミャンマー国の商業省は、2013年4月に実施した組織改編により貿易振興局（DTP）が新設され、2014年7月には貿易活動に関する情報提供やコンサルティングを行うミャンマー貿易センター（MTC）を同省傘下に設立されるなど、貿易振興に関する組織整備と、政策の策定・実施のための準備を進めている。

JICAは、商業省傘下の貿易研修センター（TTI）を対象に「ミャンマー国貿易実務能力向上調査（2012年12月～2014年3月）」を実施し、貿易実務に関する研修のニーズ調査及びその結果に基づくカリキュラムの開発等を支援した。

ASEAN 経済共同体（AEC）の発足が2015年末に迫るなか、商業省は、①内外企業の貿易活動に関する情報の収集・分析、②政府が提供する貿易振興サービスに対する民間企業のニーズの把握、さらには③貿易振興体制に関する方策の決定といった課題に早急に対応する必要があると判断し、これらの課題解決のため継続支援を JICA に要請した。

1.2 業務の目的

本業務の目的は以下のとおりである。

- ① 「ミ」国における貿易振興政策及び内外企業の貿易活動等の情報収集・分析を行う。
- ② その結果に基づき TTI による主に政府職員向け研修事業の開発及び試行的実施を行い、必要となる貿易振興施策や組織に関する理解を深める。
- ③ 将来の商業省の貿易振興体制に係る方策を検討するとともに、今後の JICA の協力の方向性について提案する。

1.3 業務の実施体制

商業省貿易振興・消費者局及び貿易局傘下の貿易研修所（TTI）をカウンターパート機関として実施した。

1.4 調査スケジュール

本件業務は2015年3月に開始され、2016年1月に終了した。本件業務の作業フローは下図のとおりである。

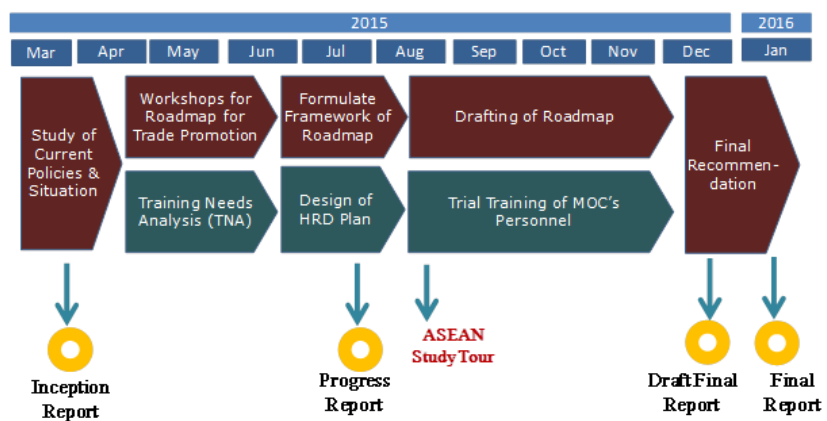


図1 調査の作業フロー

1.5 最終報告書の構成

英文最終報告書の構成は下図のとおりである。

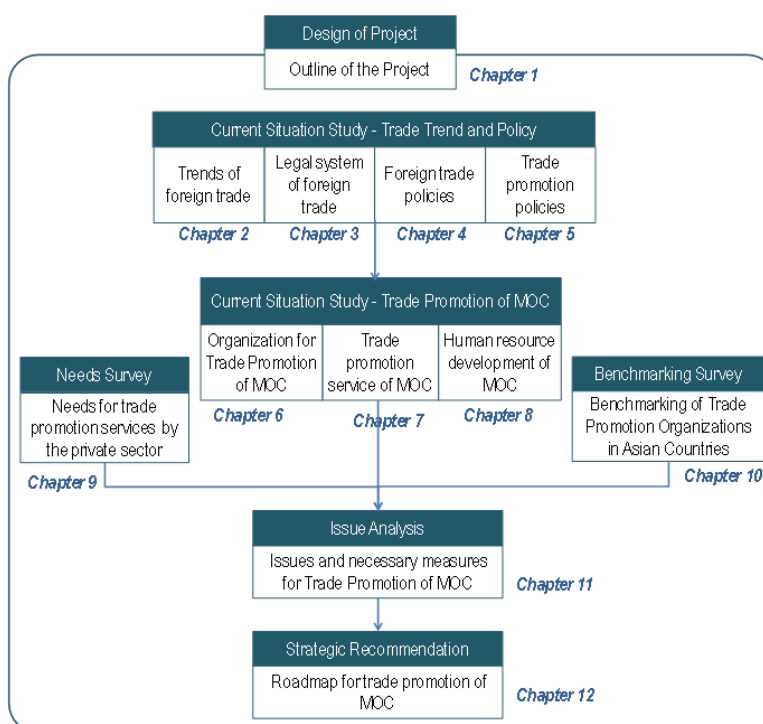


図2 英文最終報告書の構成

貿易振興のためのロードマップは、附属資料1に示した。

2. ミャンマーの外国貿易動向

2.1 ミャンマーの経済概況 2009年度以降、ミャンマー経済は着実に成長率を上昇させており、2014年度（2014年4月～2015年3月）の経済成長率は7.7%を記録した。

2.2 ミャンマーの外国貿易動向 ミャンマーの貿易収支は、2012年度に赤字に転じて以降、急速に赤字幅を拡大している。2014年度の輸出額は125.2億ドル（前年同期比11.8%増）、輸入額は166.3億ドル（同20.9%増）である。

ミャンマーの貿易は、港・空港を経由する通常貿易と隣国との国境ゲート（タイ、中国、インド、バングラデシュ計15カ所）を通じて取引される国境貿易に分けられる。2014年度において国境貿易は、輸出の34.3%、輸入の15.0%を占めた。

輸出の品目構成（2014年度）は、金額ベースで工業製品48.8%（天然ガス41.4%、縫製品8.2%）、農畜産品23.4%、鉱産物11.7%、水産品3.4%等となっている。

主要輸出相手国（2014年度）は、中国（総額の37.3%）、タイ（同32.2%）、シンガポール（同6.1%）、インド（6.0%）で、これら主要4カ国への輸出が輸出総額の8割超を占める。

輸入の品目構成（2014年度）は、金額ベースで機械・輸送機器が29.7%、基礎金属製品が11.6%、電子・電気機器が6.2%を占め、これらで全体の5割近くを占める。

アジア諸国が主要輸入相手国（2014年度）となっており、中国（総額の30.2%）、シンガポール（同24.9%）、日本（同10.5%）、タイ（同10.1%）で全体の4分の3を占める。

2.3 ミャンマーの外国貿易の課題は以下のとおりである。

- 貿易の課題
- ・機械類の輸入急増による構造的な貿易赤字
 - ・天然資源及、農産品、労働集約型加工に集中する輸出品目
 - ・輸出品目の供給能力の制約
 - ・中国、タイ、インドに集中する輸出相手国の多様化の必要性

3. ミャンマーの外国貿易管理制度

- 3.1 貿易関連法制度 商業省は、2012年9月に施行された新輸出入法に基づき施行細則、通達等を発布している。
- 3.2 輸出入手続き ミャンマーで輸出入取引を行うには、貿易業者登録を行ったうえで、個々の輸出入の際に輸出入ライセンスを取得して通関手続きを行う。
- 3.3 通関手続き ミャンマーの取引銀行でL/Cあるいは送金ベースで決済を行い、船積書類を入手した後で輸入通関手続きが可能となる。また、一部の品目については商業税が徴収される。
- 3.4 国境貿易 国境貿易は、国境地域で生産される製品を、国境を接する両国のいずれかの通貨あるいは両国が許容する通貨によって売買する貿易と定義されるが、基本的に通常の貿易と同じ輸出入手続きが適用される。国境貿易は商業省貿易振興・消費者局が管轄している。
- 3.5 外国為替管理 2012年4月に多重為替レートが廃止されて実勢レートへ一本化され、現在は管理変動相場制が採られている。2015年に入ってチャットの対ドル相場が大幅に下落しており、2014年末に1ドル=1,026チャットであった公道相場は同年11月末時点で1ドル=1,300チャットまで下落した。
- 3.6 ミャンマーの外国貿易管理制度の課題 ミャンマー政府は、貿易自由化・円滑化を通じて輸出入手続きの改善に努めているものの、未だ課題が残される。
- ① 貿易手続き変更に関する通達が遅れるケースがある。
 - ② 設備の不足や担当者の熟練度の問題から通関に長時間を要する。
 - ③ 国際的に認定された検査機関が国内に存在しない。
 - ④ 金融・為替の安定化のための政策が求められる。

4. ミャンマーの通商政策

- 4.1 通商政策の概要 2011年に新政権が発足以降、ミャンマー政府は貿易自由化、貿易円滑化、貿易振興、貿易教育を柱として通商政策の改革を進めている。
- 4.2 貿易自由化政策 WTOの設立メンバーであるミャンマーは、WTOのルールに則って譲許関税率、最恵国税率（MFN）を定めている。
- ミャンマーはASEANの一員としてASEANと中国、日本、韓国、オーストラリア・ニュージーランド、インドとの自由貿易協定（FTA）に参加している。現在、ASEANはEUとのFTA、東アジア地域包括的経済連携（RCEP）などの新たな自由貿易交渉を進めている。
- また、ミャンマーは、先進各国による関税特惠一般システム（GSP）適用の恩恵を受けている。
- ミャンマー政府は、開発中の経済特別区（SEZ）において投資企業へ原材料、機械等への輸入関税免除を適用している。
- 4.3 貿易円滑化政策 商業省は、輸出入手続きの簡素化、迅速化を着実に進めている。これまでに、必要書類の削減、ネピドーの本省のみで発給していた輸出入ライセンスのヤンゴン事務所での発給（2011年）、特定品目に対する自動認可（2012年）、申請料のオンラインペイメントの導入（2012年）、輸出入ライセンスの対象品目の削減（2013年・2014年）、オンライン申請の導入（2015

年)、輸出入ライセンス必要品目のネガティブリスト化(2015年)が実施された。

通関手続きの電子化では、日本からの支援を得てミャンマー輸出入・港湾関連情報処理システム(MACCS)の導入を進めている。

4.4 ASEAN 経済共同体に向けた貿易政策

ASEAN 各国は、ASEAN 経済共同体(AEC)の実現に向けた行程表である AEC ブループリント(2008年~2015年)に基づいて単一市場化を進めてきたが、今後は AEC ブループリント 2025 に沿って進められることになる。ミャンマーは AEC に向けて貿易自由化・円滑化の取り組みを継続しているが、時間を有する法制度整備、専門的知識の不足、不十分なインフラなどの課題に直面している。

ASEAN 自由貿易地域(AFTA)の形成に向けて 1993 年に共通効果特惠関税(CEPT)スキームが発効し、さらに 2010 年には単一市場の設立を目的とした ASEAN 物品貿易協定(ATIGA)が発効した。ミャンマーは 2018 年までに全ての品目の関税率を 0%にすることが求められている。

4.5 貿易政策の課題

ミャンマー政府は、貿易自由化及び貿易円滑化に取り組んでおり、段階的にはあるが進展をみせている。

しかし、貿易業者登録の制限、不透明な通関手続き、必要な規則の未整備など貿易取引には障壁が存在する。ミャンマー政府は、国際水準に見合うよう貿易自由化を進める必要がある。また、AEC ブループリント 2025 に合わせて貿易円滑化を実現させる必要がある。

5. ミャンマーの貿易振興政策

5.1 国家輸出戦略

ミャンマー政府は、国家輸出戦略(NES)(2015年~2019年)を 2015 年 3 月に正式にスタートさせた。NES は、国際貿易センター(ITC)及びドイツの支援を受けて商業省が取りまとめたものである。

NES は、新興ミャンマーの持続的な輸出主導の成長と繁栄をビジョンとして掲げている。その戦略は、一貫性のある貿易政策、生産能力の拡大と技術革新、支援機関の強化、インフラ整備を通じて輸出の多角化、高付加価値化を目指すというもので幅広い分野を対象としている。

NES は、7つの主要業種の輸出戦略(豆、ゴム、米、水産品、衣料、木製品、観光)と4つのクロスセクター戦略(金融、貿易情報、品質、貿易円滑化・物流)で構成される。各戦略の活動計画に含まれた活動を合計すると全体で約 950 になる。活動ごとに実施を担当する関連省庁、業界団体等が決められている。

NES 実施のために大統領の下にミャンマー貿易開発委員会(MTDC)が設置された。商業省が MTDC の事務局を務めており、NES に関わる活動の推進・調整にあたっている。

5.2 商業省貿易振興マスタープラン

商業省は貿易振興マスタープラン(TPMP)を 2013 年に策定している。TPMP は組織、人材育成、貿易情報、輸出開発、競争力、市場アクセス、民間セクター開発、研究開発、戦略的貿易からなる主要 9 戦略分野における政策が示されている。

5.3 商業省以外の省庁による貿易振興

工業省、農業・灌漑省、畜産・水産・地方開発省、環境保全・森林省、保健省、労働省、高等教育省、運輸省、財務省などの省庁が、各々の分野で NES の輸出振興活動に関わっている。

5.4 民間部門による貿易振興

ミャンマー商工会議所連盟(UMFCCI)が各業種別団体、地方商工会議所をまとめる民間経済団体である。UMFCCI は、貿易分野では①他国の商工会議所との協力、②内外企業の貿易・投資マッチング、③展示会の開催、

- ④内外の展示会への参加、⑤貿易・市場情報の提供、⑥相談、⑦人材育成などの活動を行っている。
- 5.5 ドナーによる貿易振興支援 幾つかのドナーが貿易振興分野での支援を実施している。ITC は NES 策定を支援した。
- EU は独 GIZ と共同して貿易開発プログラム (TDP) を 2015 年から 3 年間の計画で実施中である。同プログラムは、貿易政策・貿易振興、貿易円滑化、食品安全・検疫などを対象としており、輸出促進では EU への輸出促進を行う。
- 韓国は、KOTRA による新貿易振興機関 (TPO) 設立のためのマスタープラン策定、政府職員の韓国での研修を実施している。
- オランダは、開発途上国からの輸入促進センター (CBI) が、UMFCCI を主なカウンターパートとして研修、データベースの提供、輸出企業に対する指導などを実施している。
- 5.6 貿易振興政策の課題 ミャンマーの貿易振興は以下の課題を抱えている。
- ① 輸出振興にかかる障害は広範囲にわたり、相互に関連しているため障害を解決するためには関係機関の協力が不可欠である。
 - ② NES は、対象 11 セクターの約 650 の活動が関係省庁や業界団体など多くの関係機関によって実施されることになっている。商業省は事務局としてこれらの活動を調整・促進するという重要かつ難しい役割を担っている。
 - ③ NES を成功させるためには、政府の予算や専門知識に制約があることからドナーの支援が必要である。幾つかのドナーはミャンマーの輸出支援に対して前向きである。受入省庁はドナーとの調整を図り、ドナーの支援を実現するとともに支援の重複を避ける必要がある。
 - ④ 商業省の貿易振興マスタープランは、貿易振興に関わる必要な分野をカバーしている。しかし、政策のタイトルを並べただけであり、具体的な活動や方策には触れられていない。
 - ⑤ 以上の課題を踏まえて、貿易振興活動にかかる商業省の調整能力が強化される必要がある。

6. 商業省の貿易振興組織

- 6.1 商業省の組織改編 2013 年 4 月の商業省の組織改編において、ミャンマー農産物交易公社を改組して貿易振興総局 (DTP) が設立された。DTP が貿易振興政策とその為の施策を担当することになった。
- 2015 年 5 月には事務次官ポストの設置に伴って、再度、組織改編が行われ、商業大臣府が事務次官室となり、貿易振興局と商業・消費者局が統合されて貿易振興・消費者局 (DTPCA) となった。
- 6.2 貿易振興担当組織 商業省本省においては、DTPCA の下の国際貿易振興課および展示会・ミャンマー貿易センター (MTC) 課が輸出入促進を担当している。MTC は 2014 年に商業省ヤンゴン地方事務所内に設置された。その他、国内貿易振興課が国内貿易振興の活動を通じて輸出促進に関連している。R&D・技術移転課は輸出者を含めた国内生産者の技術向上に携わっている。2015 年 7 月時点で DTPCA の職員 401 名のうち上記部署には 103 名が配置されている。DTPCA の職員は高齢化が進んでおり、約 5 割は 50 歳以上である。
- MTC には 10 名の職員が配置されており、貿易振興のワンストップ・センターとして情報提供、相談業務、商品展示、ライブラリなどのサービスを提供している。

商業省の地方事務所の組織構造は本省と同じ構成・名称を用いており、各事務所の DTPCA が貿易振興を担当している。商業省は各州・地域に地方貿易センターを設置する計画を持っており、2015 年 12 月時点で 5 州・地域に設置済みであり、2016 年には新たに 5 州・地域に設置する予定である。地方貿易センターに期待される機能は基本的に MTC と同じである。

海外事務所としては、世界 9 カ所の大使館に商務官が派遣されているほか、2015 年には商業省が独自に南寧（中国）に通商代表、ジュネーブ（スイス）に WTO 代表を派遣している。

6.3 商業省の貿易振興組織の課題

貿易振興にかかる商業省の組織上の課題は以下のとおりである。

- ① DTPCA は消費者問題も担当しているため、商業省には貿易振興は一つの部署に集約されていない。
- ② 組織改編は 2003 年～2005 年に 2 回実施された。ただし、2015 年の組織改編は事務次官室の設置によるものであり、組織改編の効果やメリットについて十分検討されたとは言い難い。
- ③ 本格的に貿易振興に取り組み始めたのは、2013 年の組織改編以降であり、日が浅い。
- ④ DTPCA で貿易振興に携わっている職員は約 100 名であるが、職員の高齢化が進んでおり、歪な年齢構成になっている。
- ⑤ 貿易振興に関わる課の担当職務は定められているものの、具体的な業務フローや職務記述書は策定されていない。
- ⑥ MTC の設置は、貿易振興サービスの拡充に向けた第一歩としては評価できる。さらに商業省は地方貿易センターを設置中である。これら貿易センターのサービス提供能力の強化が課題である。

7. 商業省の貿易関連サービス

7.1 貿易情報

DTPCA が取り扱う貿易情報は、国内貿易情報と海外貿易情報に大別される。DTPCA が扱う主な貿易情報は、主要製品の価格・取扱量などの国内貿易情報である。

地方事務所は県、郡区から市場情報を収集し、毎週、本省の DTPCA の国内貿易振興課に報告する。この情報は商業省のウェブサイト及び週刊紙（Commerce Journal）に掲載される。

DTPCA の国際貿易振興課が海外貿易情報を取り扱うが、主な仕事は海外 9 カ所の大使館の商務官から送られてくる市場レポートの取り扱いである。商務官は簡単な市場レポートを毎週、本国に送付している。その他、商務官は時には週刊紙の記事原稿も作成する。

商業省は、商業省全体のウェブサイト、DTPCA のウェブサイト、Commercial Journal のウェブサイトの 3 つのウェブサイトを持っている。情報はビルマ語がメインであり、外国のビジネスマンに有用な情報は限られる。

DTPCA の国際貿易振興課は NES の実施調整を担当している。貿易情報戦略では、貿易情報のポータルサイトの開発が進められている。

7.2 展示会

展示会・MTC 課が、展示会を担当している。予算の制約があり、主催者から招待された海外展示会に年間 10 回ほど度参加している状況である。

地方事務所が地方展示会を開催しているものの MOC が主催する国内展示会は限られる。国内展示会の主な主催者は、外国政府機関、業界団体、民間オーガナイザーである。

- 7.3 陳列室 MOC は、本省、MTC、地方事務所で商品展示を行っている。本省では玄関ホールから2階にかけてミャンマーの主要輸出品を展示している。MTC は、41社の家具、衣料品、食品、雑貨など100の製品を展示している。地方事務所ではその地方の特産品を展示している。
- 7.4 図書室 MTC には図書室が設置されており、商業省の出版物、国際機関の出版物、主な貿易相手国のダイレクトリー・関税率表、ミャンマーのダイレクトリー等が展示されている。地方貿易センターも同様の書籍・資料を展示しているが、その規模は小さい。
- 7.5 相談業務 MTC 及び地方貿易センターは、輸出者、海外バイヤーを対象に相談業務を行っている。MTC は月平均20人程度の訪問を受けており、その8割はミャンマー企業である。主な相談内容は、ビジネスビザ申請用の推薦状依頼、関税情報、会社設立方法などである。
- 7.6 引合い・マッチングサービス MTC は海外からの引き合いを受けて、ミャンマーの輸出業者を紹介している。地方貿易センターも同様のサービスを提供している。
- 7.7 輸出者育成 商業省は、既存輸出者あるいは潜在的輸出者を含めて農家、手工業者などの中小企業（SME）向け支援を行っている。支援内容は、研修、ワークショップ、専門家の派遣による品質向上などで、業界団体、NGO、ドナーの協力も活用している。
商業省では幾つかの部署が輸出者育成に関わる活動を行っている。貿易研修所（TTI）は貿易ビジネスに従事している、あるいは興味を持っている企業の従業員あるいは起業家を対象の貿易研修を行っている。MTC 及び地方貿易センターは輸出ビジネス、その他関連トピックのセミナーを実施している。R&D・技術移転課及び地方事務所は、生産改善のために専門家をSMEに派遣している。
- 7.8 出版 商業省の出版物の代表的なものは、ビルマ語週刊紙「Commerce Journal」であり、発行部数は約1,000部である。「Commerce Journal」は商業関連ニュースを集めて編集されているが、英語の記事は極めて限られている。「輸出入業者ガイド」を毎年改訂している。以前は輸出者のダイレクトリー「Explore Myanmar」を毎年発刊していたが、中断されている。
- 7.9 地方事務所のサービス 地方事務所にて期待されている貿易振興サービスの範囲は、本省同様に広く、貿易情報、展示会、研修、相談業務、関連機関との連携などのサービスを提供している（附属資料2参照）。
- 7.10 海外事務所のサービス 商務官は、当該国の経済・ビジネス情報の収集を行う。毎週、商務官は市場・価格動向を取りまとめた市場リポートを作成し、DTPCA 国際貿易振興課の市場分析ユニットに送付している。
- 7.11 商業省の貿易振興サービスの課題 商業省の貿易振興サービスは次のような課題を抱えている。
- ① 所業省の貿易振興サービスのレベルは、他国のTPOと比べて見劣りしている。サービスの質を高めると同時に、サービスの幅を広げる必要がある。
 - ② 展示会や製品の価格・需給に関する国内貿易情報を除いて情報サービス活動は活発でなく、またそのための具体的な業務内容や手順が策定されていない。
 - ③ 利用者のニーズが十分把握されていないため、サービスを提供する対象が明確に把握されていない。
 - ④ 適切な貿易振興サービスを提供するのに十分な知識と経験が殆どの商業省の職員には欠けている。
 - ⑤ 効果的な貿易振興サービスを提供するには予算が圧倒的に不足している。

8. 商業省の人材育成

- 8.1 人材育成のための組織 貿易局貿易円滑化・貿易交渉課の下の貿易教育サブディビジョンが商業省職員の貿易知識の向上を担当している。貿易教育サブディビジョンは貿易研修所（TTI）と職員能力開発ユニットに分かれる。
- 8.2 人材育成プログラム 現在、商業省は以下の教育研修を実施している。
- ① 各部署が独自に実施する各分野のテーマ別研修
 - ② 貿易研修サブディビジョンが実施する全職員を対象とした研修
 - ③ 公務員が昇格の際に受ける行政管理研修
 - ④ ドナーが実施する専門研修
- 8.3 商業省の研修ニーズ JICA プロジェクトチームは貿易振興分野での商業省の研修ニーズ分析（TNA）を実施した。その結果、研修ニーズの高かったトピックは以下のとおりである。

専門知識		専門スキル	
オフィサー			
テーマ	回答比率	テーマ	回答比率
1) 消費者問題	23%	1) 英語	48%
2) 国際貿易	20%	2) 報告書作成スキル	19%
3) 戦略・事業計画	12%	3) コンピュータ	19%
4) 貿易振興サービス	7%	4) 対人関係スキル	14%
5) マーケティング	5%		
スタッフ			
テーマ	回答比率	テーマ	回答比率
1) 国際貿易	36%	1) 英語	34%
2) データ管理（市場情報）	19%	2) 報告書作成スキル	26%
3) 戦略・事業計画	15%	3) コンピュータ	24%
4) 消費者問題	9%	4) コンピュータ（上級）	8%
5) マーケティング	7%		

出所：JICA プロジェクトチーム

- 上記の結果に基づいて JICA プロジェクトチームは研修ニーズ・マトリックスを作成した（附属資料4参照）。

- 8.4 研修試行 TNA の結果を踏まえて JICA プロジェクトチームは、研修カリキュラムを策定し、以下の研修を商業省とともに実施した（附属資料5参照）。

- ① 国際貿易振興研修（スタッフ向け1日コース）（2015年8月24日：ネピドー）
- ② 国際貿易振興研修（オフィサー向け3日コース）（2015年8月25日～27日：ネピドー）
- ③ 国際貿易ビジネス研修（オフィサー・スタッフ向け3日コース）（2015年9月29日～10月1日：ヤンゴン）
- ④ 国際貿易ビジネス研修（オフィサー・スタッフ向け4日コース）（2015年10月10日～10月13日：マンダレー）
- ⑤ 貿易振興ワークショップ（オフィサー向け2日コース）（2015年12月9日～12月10日：ネピドー）

研修実施後、上記①～③の研修参加者を対象として研修で学んだ内容を職場で活用しているかの事後評価を実施した。その結果、以下の課題が指摘された。

- ① 職場での日々の業務では部分的にしか活用していない。

- ② 貿易振興サービスに従事していない職員が参加者として選定された。
- ③ 学習したことを復習する時間がない。
- ④ 研修時間が不十分である。
- ⑤ 研修参加への意欲が低い。

8.5 研修試行からの教訓 研修試行の結果、商業省職員向け研修の改善のための以下の教訓が得られた。

- ① 国際貿易振興と国際貿易手続きの二つを基本のコースとする。
- ② 特定テーマについて必要に応じて研修を実施する。例えば、マーケットインテリジェンス・市場調査研修、製品プロモーション研修、中小輸出者育成研修である。
- ③ オフィサー、スタッフ毎に研修カリキュラムを策定する。

9. 民間部門の貿易振興サービスに対するニーズ

9.1 ニーズ調査の概要 JICA プロジェクトチームは、貿易振興サービスに対する輸出企業のニーズを調査するため質問票を業界団体を通じて配布し、合計 84 社から回答を得た（附属資料 6 参照）。内訳は農業セクター40 社、林業セクター1 社、鉱業セクター3 社、製造業セクター24 社、その他 16 社である。

9.2. 主なニーズ調査結果 貿易ビジネス環境
全体的に企業の評価は低く、「まあまあ」・「悪い」が「良好」・「非常に良好」を上回った。

項目別では、「貿易政策」、「貿易手続き」が相対的に良好な評価を得ている。とくに「自由貿易体制」、「輸出政策」、「輸入政策」、「貿易関連ライセンス」が良好な評価を得た。その他では、「海上輸送サービス」、「海上保険」の評価が高い。

一方、評価が低いのは「貿易政策・規制の不透明性」、「輸出入関税」、「行政手続きの不透明性」、海上輸送以外のロジスティクス分野、「貿易決済」、貿易保険」である。

貿易ビジネス上の障害

6 割以上の企業が障害として挙げたのは、「生産技術・品質管理 (79%)」、「金融 (73%)」、「市場アクセス・販売促進 (67%)」、「教育訓練 (60%)」である。但し、他の項目も 4 割以上の企業が障害であると回答している。

貿易情報の情報源

貿易情報の主な情報源は、「ウェブ (63%)」及び「展示会 (49%)」である。また、約 3 分の 1 の回答者が、「政府機関 (32%)」を情報源として挙げた。

貿易振興サービスに対するニーズ

貿易情報と貿易相談に対するニーズが、展示会、ビジネスマッチングに比べて高い。とくに、いかに海外市場に参入するかに関する貿易情報と貿易相談が求められている。「国際市場動向に関する情報」へのニーズが最も高く、続いて「海外市場の規則・標準に関する情報」、「いかに海外市場の規制・標準に適合するか」の相談」となっている。

以上のように海外市場アクセスに対する支援へのニーズが高いが、これらは現状の商業省の貿易振興サービスで最も弱い分野である。これらの分野での能力強化は喫緊の課題である。

9.3 ニーズへの必要な対応 ニーズ調査の結果から商業省が対応すべき課題として以下の点が指摘できる。

- ① 貿易円滑化、貿易環境改善にかかる貿易上の障害が多く残されており、

- 貿易円滑化を進めるとともに、NES の活動を促進してロジスティクス、貿易金融にかかる課題解決に取り組む必要がある。
- ② 生産技術、金融に続いて市場アクセス・販売促進が障害となっている。輸出者は海外市場アクセスに関する情報を求めている。商業省は、貿易情報を収集・蓄積し、輸出者の輸出マーケティングを支援する必要がある。
 - ③ 相談業務では、国際マーケティング、ターゲット市場の規則・標準に適応する方法に関する助言に重点を置く必要がある。
 - ④ 約 8 割の輸出者が、生産技術が課題であると答えている。輸出者育成の一環としてミャンマー製品の競争力を高めるための技術支援が重要である。

10. アジアの貿易振興機関の比較調査

10.1 アジアの貿易振興機関の事例調査

JICA プロジェクトチームは、商業省がどのような貿易振興サービスをどのように提供するべきかの教訓を得る目的で、アジア諸国の貿易振興機関（TPO）の事例を調査した。日本貿易振興機構（JETRO）、マレーシア貿易開発公社（MATRADE）、インドネシア商業省国家輸出振興総局（DGNEP）の 3 機関を調査の対象とした。

(1) JETRO

略歴

1951 年に設立された財団法人海外市場調査会（JETRO : Japan. Export Trade Research Organization）が 1958 年に特殊法人日本貿易振興会（Japan Export Trade Promotion Agency）に組織変更された。1991 年には英語名が Japan External Trade Organization に改称され、2002 年には独立行政法人日本貿易振興機構に組織変更が行われた。JETRO は、60 年代は輸出促進、70 年代は海外進出支援、80 年代は外国企業や開発途上国との国際協力、90 年代は輸入促進、2000 年以降は対日輸出・投資促進と主要目的を変えてきた。

組織図

JETRO の組織は、管理部門、製品別部門、投資サポート部門、貿易・経済協力部門、展示部門から構成されている。

貿易振興サービス

JETRO は、企業のニーズに合わせて総合的なサービスを提供している。輸出に関心のある企業には、基礎知識に関するセミナーやアドバイスの提供し、ある程度輸出の目途をつけた企業には、展示会、商談会などの機会を提供するなど輸出ビジネスの段階に応じて様々な支援を組み合わせ提供している。こうした支援にあたっては、部門横断的な支援が可能となる体制を整えている。

(2) MATRADE

略歴

1993 年に経済産業省（MITI）下のマレーシア輸出センター（MEXPO: Malaysia Export Trade Centre）を改組して、MITI 傘下の公社として MATRADE が設立された。

組織図

MATRADE の組織は、管理部門、国際協力部門、輸出者開発部門、戦略計画部門と 2 つの業種別部門で構成される。業種別部門は海外事務所も管

轄している。

貿易振興サービス

MATRADEは輸出者のニーズに合わせて多様な支援メニューを用意している。MATRADEの支援で特徴的なのは、高い輸出意欲を持つ企業に支援の焦点を当てていることである。また、MATRADEは、ITを利用して幾つものサービスを提供している。例えば、MyExportは、MATRADEに登録した企業のみが利用できるオンライン・サービスである。

MATRADEは、新たな輸出者の育成に力を入れており、様々なテーマのセミナーを実施している。また、SMEに対しては幾つかの補助金プログラムを準備しており、なかでもSMEの海外プロモーションを支援市場開発補助金（MDG）は成功裏に運営されている。2013年には2,182社のSMEがこのプログラムを活用した。

(3) DGNED

略歴

商業省の下に1971年に設立された国家輸出振興庁（NAFED）が、2010年に総局に格上げされ、DGNEDと改称された。

組織図

NAFEDの時代、過去20年間の間に組織図は、輸出環境の変化や輸出促進サービスに対するニーズの変化に応じて何度か変更された。DGNEDが設立された際にサービス別組織が採用され、管理部門、輸出開発協力部門、輸出情報部門、製品開発部門、輸出プロモーション部門で構成される。

貿易振興サービス

DGNEDは、主にSMEに対して幅広い支援を行っている。輸出市場情報サービスでは、海外市場調査レポート、製品分析レポートをはじめ様々な種類の出版物を発刊している。また、ウェブサイトを活用して、貿易関連情報、インドネシア製品紹介、貿易規則・関税率・通商条約などの海外市場情報などを提供している。相談業務、引合い、ビジネスマッチングなどのサービスは顧客サービスセンター（CSC）が提供している。製品開発支援は、SMEとデザイナーをマッチングさせることでSMEによる輸出向けの魅力的なデザインの製品開発を目的としている。輸出プロモーションでは、展示会や貿易ミッション派遣だけでなく、ナショナル・ブランディングも行っている。加えてインドネシア輸出研修センター（IETC）がSMEの成長段階に応じて様々なテーマの輸出研修を実施している。

DGNEDは、オンライン・ベースで会員サービスを開始しており、会員登録企業に対しては多くの特典的なサービスを提供している。

10.2 ASEAN 視察調査

本プロジェクトでは、ASEAN諸国のTPOのベスト・プラクティスを学ぶ目的で、MATRADE（マレーシア）及びDGNED・IETC（インドネシア）に対する視察調査（2015年8月9日～8月15日）を実施した。JICAプロジェクトチーム及び商業省の5名の職員が同調査を実施した（附属資料7参照）。

両国のTPOの経験と商業省の現状を比較して、商業省は以下の点を教訓として参考にしたいと考えている。

① SME向け支援策の拡充

両国のSMEは幅広い貿易振興サービスを受けており、これを参考に商業省は関連省庁、民間部門、UMFCCI等と協力して支援サービスを拡充する必要がある。補助金など金融面での支援も必要である。

② 海外貿易プロモーション・オフィスの設立

海外に貿易プロモーション・オフィスを設置することは、ミャンマー

の貿易振興を強化するために重要である。

- ③ SME の窓口としての国内支援オフィスの設立
MTC は総合的サービスの提供を目的に設立されているが、更なる機能強化が必要である。
- ④ SME 向け研修の強化
SME のニーズの把握とニーズに合ったカリキュラムの開発が必要である。コーチング・プログラムは輸出者育成に効果的である。また、SME が地方に分散するミャンマーの現状を考えるとモバイル研修が有効である。
- ⑤ 人材育成と人事管理の重要性
新 TPO の設立にあたっては、組織・人材両方の能力強化が必要である。

10.3 TPO の組織構造 の事例研究

TPO の組織構造は、一般的に、サービス別組織、製品別組織、市場別組織、以上の 3 つの混合型組織に大別できる。通常、新設された TPO はサービス別組織でスタートするケースが多い。新設の TPO は貿易振興サービスの専門性を確立する必要があり、サービス別組織が専門性の確立に適しているからである。次第に経験を蓄積し、提供されるサービスが拡大するに従って、より適した組織形態に組織改編を行うケースも出てくる。

TPO の形態には、貿易を担当する省庁のなかの一つの部署であるものと、独立機関の 2 種類ある。国によっては商工会議所が TPO の役割を果たしている例もある。TPO の形態はそれぞれの国の事情によって決まっている側面がある。独立機関は、貿易振興サービスのために確固とした組織を作りたいという政策判断で選択されるケースが多い。独立機関は、通常、より大きな自主性が与えられ、迅速で柔軟な運営、独自の採用、民間企業に似た経営の導入などが可能となるメリットがある。一方で、このメリットを確保するためには、しかりとした財政基盤、経営の自主性の確保、ガバナンスの確立、官僚主義の排除などが実現される必要がある。

10.4 事例調査からの 教訓

事例調査からの教訓としては以下の点が挙げられる。

組織・マネジメント

- ① TPO としての発展段階に応じて、政策が求める目標を最大限に実現するために効果的に運営できるような組織構造を設計する必要がある。
- ② TPO のステータスの選択は、関連する要因（貿易振興サービスの提供能力、組織文化・モチベーションへの効果、最適なサービス提供の形態、経済環境、政治的コミットメントなど）を考慮して決定する必要がある。
- ③ 部門間の協力体制が確保されることが必要である。
- ④ 優れた経営管理システムの導入が必要である。
- ⑤ 必要なサービスに基づいて予算を立て、予算を配分する必要がある。

貿易振興サービス

- ① 中核となる基本的なサービスの確立に注力する必要がある。
- ② 輸出者のニーズに合致するよう情報提供を強化する必要がある。
- ③ 輸出者育成は輸出振興の基本的なアプローチの一つとして重要である。
- ④ ワンストップ・サービス・センターの設置は、効果的に貿易振興サービスを提供するための一般的な方策である。
- ⑤ 会員サービスも効果的な輸出促進サービス提供のための一般的な方策である。
- ⑥ 貿易振興サービスを総合的に提供できるようにサービス・メニューや体制を整えることが重要である。

- ⑦ 海外オフィスによる海外での活動は、効果的な輸出プロモーションを実現し、サービスの質を向上するうえで重要である。
- ⑧ 一般的に TPO は、特定の目標を設定したプログラム・ベースのサービスを導入している。

11. 商業省の貿易振興の課題と必要な対応策

11.1 マネジメント面での課題

- (1) 政策環境
 - ミャンマーの輸出は、資源ベース型・労働集約型品目といった特定の品目に偏っている、関連インフラの整備が遅れている、AECによる自由化などの広い範囲の課題に直面している。
 - これらの課題に取り組むために国家輸出戦略（NES）が策定されたが、NESの実施に多くの関係者の調整が求められる。
 - 商業省には、NESを推進するための中心的な役割が期待されている。
 - DTPCAは、ミャンマーのTPOであるが、他国と比べてその能力は見劣りがする。
 - (2) 組織
 - 貿易振興関連部署の業務や機能が明確に確立されていない。
 - 商業省の指揮系統はしばしば不明瞭である。
 - 貿易振興サービスの方針・活動計画は実務的に策定されておらず、また職員に共有化されていない。
 - 顧客志向の貿易振興サービスを提供するというビジネス志向の考え方が弱い。
 - 商業省のなかには貿易振興を統括し、貿易振興に専従する部署がない。
 - 最大の商業の中心地であるヤンゴンにおける貿易振興サービスが弱体である。
 - 地方貿易センターは最近開始されたが、貿易振興活動を拡大させていく必要がある。
 - 本格的に貿易振興サービスを提供するためには予算が不十分である。
 - (3) 経営管理システム
 - すべての貿易振興サービスについて業務フローと標準業務手順書が作成されていない。
 - 職員への職務の割り振りは、業務で求められるものに合致しておらず、またバランスも取れていない。
 - 意思決定の権限委譲は他のTPOに比べて小さい。
 - 商業省ではITの普及が遅れている。
 - (4) 人事管理
 - 貿易振興に従事する優秀な職員の数は足りない。
 - 商業省の職員は、質の高い易促進サービスを提供するために必要となる十分な知識と経験を持っていない。
 - 職員の年齢構成が歪である。
 - 人材育成に効果的な人事管理ツールが導入されていない。
 - 商業省の人材育成制度は体系的・計画的ではない。
- ### 11.2 サービス面での課題
- (1) 貿易情報
 - 非常に限られた種類の輸出情報しか提供されていない。
 - 市場情報の収集・分析能力が非常に弱い。

- 商業省は、貿易振興のためデータベースを効果的に利用していない。
 - 商業省のウェブサイト上の情報の多くはビルマ語であり、外国人ビジネスマンにとって役立つ英語情報は非常に限られる。
- (2) 見本市・展示会
- 海外見本市への参加あるいは国レベルの大型国内見本市の開催には十分な予算がない。
 - 商業省は、展示会の運営方法・管理ツールなどのノウハウを持っていない。
 - 展示会に参加するミャンマー企業に対して効果的な販売促進のための支援が十分提供されていない。
 - 商業省は、国内の展示会において貿易振興活動を活発に行っていない。
- (3) 常設展示
- ヤンゴンの MTC の常設展示への訪問者の数が非常に少ない。
 - 常設展示について明確な展示計画が策定されていない。
 - 展示品の定期的変更が行われていない。
- (4) ライブラリ
- ライブラリへの訪問客は非常に少ない。
 - ライブラリの利用者のターゲットが明確に設定されていない。
 - 訪問者を増やすには魅力的な蔵書が揃っていない。
 - 図書購入予算が限られている。
 - ライブラリ管理システムが未確立である。
- (5) 相談業務
- 相談のために来訪する訪問者が少ない。
 - 実践的な助言を与えられる人材が非常に限られている。
 - 相談業務に役立つ情報が蓄積されていない。
- (6) 引合い・ビジネスマッチング
- 商業省が受け取る引合いの数が少ない。
 - 輸出者及び海外バイヤーの間での MTC の認知度が低い。
 - 引合い・ビジネスマッチングは、システムティックに処理・記録されていない。
 - 海外からの引合いに対して輸出者を紹介した後のフォローアップが行われていない。
- (7) 輸出者育成
- 輸出の可能性を持つ企業に対して体系的にきめ細かい輸出者育成サービスが提供されていない。
 - 輸出の可能性を持つ企業に対する技術支援が不十分である。
 - 既存の貿易研修は、輸出者育成には不十分である。
- (8) 出版
- 限られた数の出版物しか貿易振興のために出版されていない。
 - 週刊紙「Commercial Journal」の記事の殆どはビルマ語で書かれている。
 - 商業省が作成する貿易振興サービスやミャンマー製品のパンフレットは魅力的でなく、また定期的に更新もされていない。
 - 出版事業も予算制約を受けている。
 - 商業省の出版物は、商業省のサービスの効果的な広報のために活用されていない。
- (9) 地方事務所のサービス

- 各地域事務所は非常に広い地域を管轄している。
- 地方事務所の予算は限られている。
- 貿易振興活動は、主に国内市場情報と展示会である。
- 本省、MTC とのより緊密なコミュニケーションと連携が望まれる
- 地方貿易センターの能力強化が必要である。
- 貿易振興サービスの強化のためには貿易振興にかかる研修と経験が必要である。

(10) 海外事務所のサービス

- 商業省の海外の出先の数は非常に少ない。
- 商務官の貿易振興にかかる主要業務は市場情報の収集のみである。
- 商務官が作成する市場レポートの中身は薄い。
- 商務官の貿易振興業務の業務範囲が明確かつ詳細に決められていない。
- 商務官は、時間と予算の制約に直面している。
- 商務官の貿易振興に関する研修が十分でない。

12. 商業省の貿易振興のためのロードマップ

12.1 背景

現状分析、課題分析、必要な対応策の検討という手順で明確化した商業省が取り組むべき施策を貿易振興ロードマップ（以下「ロードマップ」）として取りまとめた（附属資料1参照）。従って、ロードマップは、本業務の終了後、商業省が貿易振興機能の強化のために実施すべき実行計画と位置づけられる。

12.2 ロードマップ策定にあたっての基本方針

以下の視点をロードマップ策定にあたっての基本方針とした。

- ① ミャンマーの現在の輸出の発展段階に応じて貿易振興の役割と機能を決める。
- ② ロードマップは、総合的で主体的な貿易振興サービスを実現するまでの道筋を示したものとする。
- ③ 狭義の貿易振興の枠を超えて輸出者育成のアプローチを含める。
- ④ 輸出者の成長段階に応じた適切な支援の提供ができるようになるための道筋を占める。
- ⑤ 商業省の貿易振興機能の強化にあたっては能力開発にプライオリティを置く。
- ⑥ ロードマップは、貿易振興機能を段階的に強化のための道筋を示すものとする。
- ⑦ 商業省がミャンマーにおける輸出促進の中核機関として、関係者間の協力を促進する役割を果たす。
- ⑧ ビジネス志向・顧客志向の貿易振興サービスを効果的に提供できるような組織文化と仕事のスタイルを実現する。

12.3 ロードマップの時間枠

本ロードマップでは、以下に示したのとおり時間軸として3段階のフェーズに分けて実行していくことを想定している。

第1段階：基礎的な貿易振興機能を提供する能力を築く段階（即時）

第2段階：貿易振興機能の範囲や質の面で近隣 ASEAN 諸国の TPO の水準にキャッチアップする段階（短期）

第3段階：近隣 ASEAN 諸国の TPO に匹敵する高い水準の貿易振興機能を実現する段階（中期）

12.4 マネジメント強化計画

(1) マネジメント強化の基本方針

- ① 貿易振興の分野でのリーダーシップを確立する。
- ② 満足度の高い貿易振興サービスが効果的に提供できるよう組織構造を改編する。
- ③ 意思決定プロセスの合理化、権限委譲により迅速かつ柔軟な意思決定を実現する
- ④ 貿易振興サービスのサービス水準を引き上げるため人材育成にプライオリティを置く。
- ⑤ マネジメントの強化のため民間企業や他国の TPO が採用している経営手法を導入する。
- ⑥ 貿易振興のための組織、経営、サービスの改善のために他国の TPO から学ぶ。
- ⑦ 必要最低限の予算と人員を割り振る。

(2) ビジョン・ミッション

ビジョン

「国家の持続的な社会経済開発に資するため、効果的な貿易振興サービスの提供とミャンマーの製品・サービスの競争力の強化を通じてミャンマーの貿易を振興する。」

ミッション

- ① ミャンマー製品の海外市場への参入を支援する。
- ② ミャンマー製品の競争力を強化する。
- ③ ミャンマーの輸出品目の多様化を促進する。
- ④ ミャンマーの新たな輸出者を育成する。
- ⑤ 国家輸出戦略（NED）を推進する。
- ⑥ 貿易支援機関の能力強化を支援する。

戦略

- ① ビジネス志向・顧客志向の貿易振興サービスを提供する。
- ② 貿易振興サービスの質を高める。
- ③ 貿易振興サービスの効果的な運営を実現する。
- ④ 職員の能力を最大限に高める。
- ⑤ 組織文化を活性化する。

(3) 組織改編

目標

- ① 総合的な貿易振興サービスを効果的に提供できる組織を築く。
- ② 単純で、柔軟で、円滑な運営を実現し、指揮命令系統が複雑になるのを防ぐ。
- ③ ビジネス志向の考え方と組織文化を職員に根付かせる。
- ④ 貿易振興のみを担当する部署あるいは組織を作る。
- ⑤ 本省に置かれている貿易振興機能の一部をヤンゴンに移す。
- ⑥ MTC 及び地方貿易センターの業務を見直し、両者間の協力体制を緊密にする。

活動

- ① 本ロードマップのタイムフレームに従って組織改編を実施する。

第1段階：即時	第2段階：短期	第3段階：中期
<ul style="list-style-type: none"> - 既存の人員とサービスを前提として、より効果的にサービスを提供できるよう組織変更を行う。 - 貿易振興のみに従事する部署を設置する。 	<ul style="list-style-type: none"> - 堅実かつ満足度の高いサービスを提供できるしっかりした組織を作る。 - 持続可能な経営基盤を確立し、十分なりソースを配分する。 	<ul style="list-style-type: none"> - 最適組織を実現する。 - 自主運営を認め独立機関とする。

- ② 外部・内部事業環境や貿易振興のニーズに対応して組織構造を再設計し、必要が生じた時にタイムリーに組織変更を実施する。

商業省は、DTPCAの貿易振興機能を独立させて新組織を作ることとを計画している。その次のステップとなるフェーズ2段階（あるいはそれ以降）で目指すべきモデル組織として、本ロードマップではサービス別組織を提案する。これは商業省の貿易振興機能は、現在、非常に限定的であり、短期的には基本となるサービスの強化と専門的能力の蓄積に注力が必要があり、サービス別組織がこれに最も適しているという理由からである。

(4) 経営管理システム

目標

- ① 計画部署と管理部署を強化する。
- ② 業務フローと作業手順を確立する。
- ③ 業務改善に効果的な管理ツールを導入する。
- ④ 指揮命令系統と職務分掌を明確化する。
- ⑤ 他国のTPOを参考にして新しいサービスを設計する。
- ⑥ 上記①～⑤の経営管理システム強化を段階的に実施する。

活動

- ① 貿易振興サービスについて業務フローと明確な職務記述書を作成し、効果的なサービス提供につなげる。
- ② 目標管理制度と業績評価制度を導入する。
- ③ 年間活動の評価のために業績評価指標を導入する。
- ④ ITの活用を促進する。

(5) 人事管理

目標

- ① 総合的な人材育成計画を実施する。
- ② 人事評価制度に基づいた人事管理を実施する。
- ③ 適材適所の方針で配置転換を行う。
- ④ 中核となりうる優秀な職員を育てる。
- ⑤ TTIや国際機関の支援などの人材育成のリソースを活用する。

活動

- ① 訓練ニーズ分析の結果に基づいて訓練計画を策定する。
- ② 貿易振興サービスの重要度と職員のレベルに従って段階的な能力向上に留意して研修を実施する。
- ③ 長期的な視点から職員のキャリア形成計画を策定する。
- ④ キャリア形成の一環として、また適材適所の視点から配置転換を実

施する。

- ⑤ 有望な職員を選定して集中的な教育訓練を実施し、貿易振興の中核となる人材、製品・市場の専門家、貿易アドバイザーに育成する。
- ⑥ キャリア開発、能力開発、人事開発の観点から人事評価制度を活用する。
- ⑦ TTI の協力を得て貿易振興・国際ビジネスに関する研修を実施する。
- ⑧ 職員の能力開発に国際機関の技術支援を活用する。

(6) 資源配分

目標

- ① 可能な手段を用いて貿易振興サービスのための予算を増やす。
- ② 活動・プログラムの費用対効果に留意する。

活動

- ① 貿易振興活動・プログラムへ予算を配分するメカニズムを確立する。
- ② 必要最小限の予算を配分する。
- ③ 民間部門・国際機関との協力を推進する。
- ④ 将来的には、出版や有料サービスなどの自主収入を検討する。

12.5 貿易振興サービス強化計画

(1) 貿易振興サービス強化の基本方針

- ① 貿易振興サービス強化計画は、一般的かつ重要な貿易振興サービスをすべてカバーする。
- ② 貿易振興サービスはロードマップの時間枠に従って強化していく。
- ③ 輸出者のニーズをきめ細かく見極めつつ、他国の TPO の事例を参考に輸出促進サービス活動を設計する。
- ④ 貿易振興サービスを効果的に実施するためには、マネジメント強化計画で実施される施策が不可欠である。

(2) 貿易情報

- ① 市場情報開発計画を策定する。
- ② 情報源、とくに海外の情報源を拡大して、情報収集を強化する。
- ③ 市場調査のガイドライン、マニュアルを作成する。
- ④ 市場調査能力を強化する。
- ⑤ 市場情報の優先度に対応して市場レポートの種類を増やすとともに質の改善を図る。
- ⑥ 市場情報データベース（海外市場情報、輸出者、海外バイヤー等）を開発する。
- ⑦ ウェブサイトを改善する（主に海外バイヤー向けに）。

(3) 展示会

- ① 世界の展示会情報を収集する。
- ② 参加するべき、あるいはミャンマー出展者を支援するべき優先度の高い展示会を選定する。
- ③ 展示会をナショナル・ブランディングの機会として活かす。
- ④ 国内展示会の場にブースを持ち、貿易振興サービスを提供する。
- ⑤ 展示会のブース、パンフレットに用いる魅力的な標準化したビジュアル・アイデンティティを作成する。
- ⑥ 展示者・参加者への支援を強化する。

- ⑦ 展示会の成果をフォローアップする。
- ⑧ 国内展示会の統一規格を策定・普及し、モニターする。
- ⑨ 輸出促進のための国レベルの国内展示会を企画・実施する。

(4) 常設展示

- ① あらゆる機会をとらえて常設展示の広報を行う。
- ② 展示品のパンフレットを作成する。
- ③ 専門家の支援を得て展示の魅力度を高める。
- ④ 特定のテーマを持った展示を企画し、定期的に展示品を変更する。
- ⑤ 業界団体と協力してイベントを常設展示場で開催する。

(5) ライブラリ

- ① 対象とするライブラリ利用者を明確化し、利用者のニーズに合わせたライブラリの運営計画を策定する。
- ② 必要な書籍、統計書、ダイレクトリーなどの収集方法を検討する。
- ③ 蔵書管理も含めてライブラリ運営システムを作る。
- ④ ライブラリの運営方法に関して司書担当を研修する。
- ⑤ 統計、関税率、規則などのデジタル情報を提供する e-ライブラリを構築する。
- ⑥ MTC と同様のライブラリを地方貿易センターにも設置する。

(6) 相談業務

- ① 相談業務に従事する職員に対して必要な知識・スキルについて集中的な研修を実施する。
- ② 相談業務を広報し、利用者の拡大を図る。
- ③ 相談業務の際に相談員が参照する情報を揃える。
- ④ 他の部署との連携・協力体制を築き、タイムリーに適切な助言を行えるようにする。

(7) 引合い・ビジネスマッチング

- ① ウェブサイト上で引合いサービスの広報を行う。
- ② 展示会や訪緬貿易ミッションの機会を利用したビジネスマッチングを行う。
- ③ 引合い・ビジネスマッチングのためのマニュアル、パンフレットを作成する。
- ④ 引合いに迅速に対応する（回答時間に目標を設定する）。
- ⑤ ビジネスパートナー候補を紹介した後、成約状況をフォローする。
- ⑥ 引合いと対応の記録をデジタルデータで残す。

(8) 輸出者育成

- ① 商業省職員を製品専門家に育成し、輸出可能性のある企業に実地指導を行う。
- ② 定期的に輸出可能性のある企業を発掘し、総合的な支援を提供して輸出者に育てる。
- ③ 輸出者育成のための業界団体との協力体制を強化する。
- ④ 輸出者（潜在的輸出者を含む）に対して品質向上やデザイン向上のための技術支援を提供する。

- ⑤ ミャンマー優秀製品賞やミャンマー・ブランド・マークなどのナショナル・ブランディングのためのプログラムを実施する。
- ⑥ 主要輸出品目のサプライチェーン開発を支援する。
- ⑦ 輸出者の輸出マーケティング活動を支援する。
- ⑧ 輸出者と海外バイヤーを対象に会員サービスを開始する。
- ⑨ 定期的にミャンマー輸出者を集めたフォーラム（会合）を開催する。
- ⑩ 実務的な TTI のカリキュラムを増やす。
- ⑪ 短期コースを含めて貿易研修コースの種類を増やす。
- ⑫ 地方での研修コースを増やす。

(9) 出版

- ① 定期的に輸出者・輸入者ダイレクトリー（「Explore Myanmar」）を改訂する。
- ② 「Commerce Journal」に海外市場情報を増やし、その内容を充実させる。
- ③ 「Commerce Journal」やウェブサイトにて英文の記事を増やす。また、英文版「Commerce Journal」を発刊する。
- ④ DTPCA・MTC・地方貿易センターのパンフレットを定期的に改訂し、内容を改善する。
- ⑤ ミャンマー製品を紹介するパンフレットを新たに作成する。
- ⑥ 将来的には商業省が行った市場調査のレポートを刊行する。
- ⑦ 出版物を海外の大使館を含めより幅広く配布する。
- ⑧ 出版物の内容をウェブサイトにアップロードする。

(10) 地方事務所のサービス

- ① 貿易振興サービスを効果的・効率的に提供するために地方事務所の機能を再検討し、サービス提供の業務フローを策定する。
- ② DTPC・MTC・地方事務所間の協力関係を強化する。
- ③ インターネットを利用して地方事務所との情報共有化を図り、地方事務所の貿易情報サービスを強化する。
- ④ 地方事務所の職員の教育訓練を実施する。

(11) 海外事務所のサービス

- ① 輸出者や海外バイヤーを対象とする貿易振興サービスに商務官を活用する。
- ② 商務官の貿易振興のための役割を再検討し、商務官の活動の幅を広げる。
- ③ 商務官の貿易振興活動に関する標準ガイドラインを作成し、配布する。
- ④ 商務官を対象に貿易振興をテーマとした追加研修を実施する。
- ⑤ 重点輸出相手国に大使館に商業省の職員を派遣する。

13. JICA の協力の方向性

13.1 ミャンマー政府の貿易振興政策を巡る環境

- 貿易振興政策を巡るミャンマー政府の状況は、次のとおりである。
- ① 2015 年 11 月の総選挙の結果、2016 年 4 月に新政権が発足することになった。

- ・総選挙では国民民主連盟（NLD）が軍人議員枠を含めても民族代表院（上院）、人民代表院（下院）の過半数（60%及び58%）を獲得。
- ・2016年1月末に新国会の発足と両院議会議長の任命（投票日から90日以内）、2月初旬に大統領選出委員会3グループ（上院、下院と軍人議員グループ）会合、3月に新大統領の選定の予定。

- ② 2016年4月より新政権による政策運営が開始されることになっているが、新政権の政策運営能力、実業界との関係等が不透明である。
- ③ 新政権及び新商業大臣の貿易振興に対する方針が不透明である。WTO、AEC等に則った貿易自由化・円滑化は引き続き進める必要がある。投資促進と並んで貿易振興の必要性も認識される可能性は高いが、貿易振興のプライオリティ、具体的な貿易振興政策がどうなるかは不透明である。
- ④ NLDのリーダーが2015年12月の演説で省庁再編に触れており、新政権のもと省庁再編が具体化する可能性がある。商業省と工業省の統合、貿易・投資促進機関の設立なども可能性として存在する。場合によっては、投資も含めた新たな貿易投資促進機関の設立が加速する可能性がある。
- ⑤ 国家輸出戦略が引き続き、国の主要長期経済政策として引き継がれるのかの懸念がある。国際機関 ITC のイニシャティブであり EU も関わっているので継続される可能性は高い。しかし、国家輸出戦略については、政策レベルでの妥当性はあるものの、実施レベルでは円滑な運営や実効性については課題がある。

13.2 商業省内部の課題

予定通り2016年4月に、新組織（DTPCAから貿易振興機能を分離独立して、新しい局（Myanmar Trade Promotion Organization）が設立されたとしても、以下の課題が残される。

- ① 今の組織のなかで貿易振興に関わる部署を集めただけであるので、貿易振興サービスが初歩的段階にあること、職員の能力の低さなどの課題はそのまま残される。
貿易振興サービス改善のための職務内容・業務フローの設計、職員の能力強化が喫緊の課題となる。
- ② 新組織の長（総局長等）が頻繁に海外出張する状況が続いた場合には、新組織をきっちり運営し、サービスを強化するためのリーダーシップが取れるかについて疑問が残る。
新組織の強化にじっくりと取り組めるトップマネジメント（総局長、副総局長、課長）の任命と業務環境の準備が必要である。
- ③ 課（Division）レベルの課長（Director）をみると、貿易振興サービスを強化するための計画・指示などを行う能力が不足している。
- ④ 商業省のドナーからの援助受け入れ姿勢は、「来るものは拒まず」である。貿易振興分野で商業省は幾つかのドナーから支援を受けているが、一部の重複がある。このため、ドナー調整会議が定期的に持たれている。本件とKOTRAの支援では、DTPCA副総局長からはKOTRAは新独立TPOの設立を担当し、本件は貿易振興サービスの強化を担当するというデマケが提案された。
- ⑤ 商業省の組織体制については、新大臣のもとで再度、組織再編・トップ層の移動が行われる可能性がある。また、政策の重点についても変更の可能性が無いとは言えない。

13.3 商業省の貿易振興強化に関する

商業省の貿易振興強化に関する支援ニーズは以下のものがある。

- ① 輸出促進サービスに的を絞った能力開発に対する支援

支援ニーズ

現在の商業省の貿易振興サービスは、(年に数えるほどの) 展示会、ウェブサイトでの情報提供(殆どの情報はビルマ語)、ヤンゴンのミャンマー貿易センターでの輸出入者への支援といった非常に限られたものであり、そのサービスのレベルも初歩的である。商業省の殆どの職員の輸出促進サービスに関する理解度、知識、経験は低い。

商業省の輸出促進サービスの強化のためには、サービス改善策の策定、新サービスの提案、職員の能力向上に対する支援が必要である。着実にサービスを改善し、根づかせるためには OJT による能力強化が求められる。

② NES 実施プロセスに関する支援

NES には多くの関連省庁、UMFFI、業界団体、NGO が関わっており約 650 の活動が掲げられている。NES の活動に円滑に NES に掲げられた活動を実施するためには、Secretariat を務める MOC にしっかりした調整・ファシリテーションが求められる。

同ニーズに対しては、ITC が支援を継続することになっている。

③ 独立 TPO 設立に関する支援

独立した貿易振興機関(TPO)の設立はNESに掲げられた活動の一つである。しかし、商業省はTPOの組織運営に関するノウハウ・経験を有していない。商業省自身で、メンバーを選んでタスクフォースを作り、他のTPOのケースを勉強して、自らで設立計画、運営規則、貿易振興サービスの設計を行うことは、現状の人材をみると困難である。同ニーズに対しては、KOTRA が支援を実施しており、本件 JICA プロジェクトチームもロードマップ作成において支援を実施した。KOTRA が担当しているのは新TPOの組織案及び独立組織移管への法制度整備等である。しかし、現在のKOTRAの計画では支援は2016年6月までとなっており、その後、独立TPOまで支援を継続するかは不明である。

④ 業種別輸出戦略の策定

DTPCA 副総局長は、主要輸出品目について業種別の輸出戦略を策定したいとの意向を有している。

但し、NES 自体が既に主要 7 業種(豆、ゴム、米、水産品、衣料、林産品、観光)についての輸出戦略を含んでいる。従って、新たに業種別輸出戦略を策定する場合には、上記 7 業種以外の業種を選定することになる。策定された新業種の輸出戦略はNESに追加されることになろうが、新業種戦略策定のアプローチ、構成はNESを踏襲する必要があるのかが検討課題となる。

なお、ドナー会合の場で KOTRA は、輸出戦略ではなく、ミャンマー製品の韓国市場調査として食品(野菜・果実・蜂蜜・食肉・加工食品)、手工芸品、宝石、IT、工業製品の調査を実施すると発言している。

⑤ 個別プログラム策定・実施に対する支援

商業省は、輸出者育成、ナショナル・ブランディングでの活動を強化したいと考えている。こうした個別プログラムについては、立ち上げから運営までの支援が必要となる。

とくに輸出者育成については、これまでも商業省で散発的に取り組まれてきたが、製品の品質向上、技術導入、サプライチェーン、物流などの課題が密接に関わってくるため、工業省、農業・灌漑省との協力体制とデマケが課題となる。また、「①」と同様に、職員の能力強化が大きな課題である。

ナショナル・ブランディングは、ミャンマー製品の国際的なイメージ

向上が必要との考えによるものである。但し、どのような製品がナショナル・ブランディングの対象になりうるかは検討課題となる。商業省が例に挙げているのは米の品質基準の制定により、ミャンマー産の米に対する信用度向上である。

⑥ TTI・貿易研修のカリキュラム強化に対する支援

本件の先行案件では、民間企業向け研修カリキュラムの充実を目的に TTI の能力強化が図られた。商業省の職員の能力向上には TTI による商業省職員に対する研修強化が不可欠である。本件でも商業省職員の研修ニーズ分析 (TNA) を実施したが対象は一部に限られた。本格に TNA を実施し、より詳細な研修プログラムを設計し、職員を対象に実施することの有効性は大きい。また、職員向け研修という観点からの TTI の能力強化も重要である。

ただし、新政権下の商業省での TTI の組織的位置づけやステータスがどうなるかについては不確定要因がある。

上記以外の分野では、以下のような支援ニーズも存在する。

- ① 輸出円滑化の分野での支援 (現在、JICA は税関に対して支援を実施中)
- ② 消費者保護の分野での支援
- ③ 品質検査機関の検査能力向上
- ④ 国際展示場の設立

13.4 想定される JICA 支援

貿易振興分野での商業省への JICA 支援としては以下のものが考えられる。

- ① 本件で策定したロードマップに応じた輸出促進機能の強化 (技プロあるいは専門家派遣)
- ② 個別テーマ (輸出者育成あるいはナショナル・ブランディング) でのプログラム策定・実施支援 (技プロあるいは専門家派遣)
- ③ 商業省の職員研修の強化 (専門家派遣)

商業省の貿易振興サービス強化のための技術プロジェクト案として以下のものが考えられる。

案件名	ミャンマー国輸出促進サービス機能強化プロジェクト
背景	ミャンマー国 (以下「ミ」国) は貿易自由化、貿易円滑化、貿易振興を貿易政策の柱として取り組んでいる。貿易収支が悪化するなか輸出拡大が経済政策上、重要な課題となっている。「ミ」国政府は、ITC の支援のもと国家輸出戦略 (NES) を策定・実施しており、商業省は、貿易研修所 (TTI) の設立、貿易振興を担当する部局の設立など、輸出促進に取り組んでいる。なかでも、NES に掲げられた目標である新貿易振興機関 (TPO) の設立とともに商業省の輸出振興サービス能力の強化が重点課題となっている。
事業目的	商業省の輸出促進のための組織・サービス強化を図る。
相手国	商業省貿易振興・消費者局
上位目標	「ミ」国の輸出が拡大するとともに、輸出品目・輸出相手国の多様化が進展する。
成果	① 商業省の貿易振興組織が設立され、効果的なマネジメント体制が確立される。 ② 商業省の輸出情報サービスが拡充される。

	<p>③ 商業省の輸出プロモーション・サービスが拡充される。</p> <p>④ 商業省の輸出者育成サービスが拡充される。</p>
活動	<p>① 貿易振興組織の設立及びマネジメント体制の確立</p> <p>1-1：貿易振興組織の設立計画に対する助言を行う。</p> <p>1-2：マネジメント改善のためのマネジメントツールの導入の計画・実施を支援する。</p> <p>1-3：輸出振興に係る人材開発体制の改善を支援する。</p> <p>1-4：他省庁・民間団体との連携体制強化を支援する。</p> <p>② 輸出情報サービスの拡充</p> <p>2-1：情報データベースの整備を支援する。</p> <p>2-2：市場調査に関する能力強化を支援する。</p> <p>2-3：市場情報提供の整備を支援する（情報の種類、出版物・ウェブ等を通じた提供）</p> <p>③ 輸出プロモーション・サービスの拡充</p> <p>3-1：展示会運営の能力向上を支援する。</p> <p>3-2：貿易ミッション活動の強化を支援する。</p> <p>3-3：MTC及び地方貿易センターの能力向上を支援する。</p> <p>3-4：ナショナル・ブランディング強化を支援する。</p> <p>④ 輸出者育成サービスの拡充</p> <p>4-1：輸出者育成プログラムの策定・実施を支援する。</p> <p>4-2：メンバーシップ制度の導入を支援する。</p>
投入	<p>専門家：</p> <p>① 総括/輸出振興政策</p> <p>② 輸出情報サービス</p> <p>③ 輸出プロモーション・サービス</p> <p>④ 輸出者育成サービス</p> <p>⑤ 情報管理（マネジメントシステム、データベース、ウェブサイト）</p> <p>⑥ 人材育成</p>
前提条件・外部条件	<p>前提条件</p> <p>①新政権が引き続き輸出促進を経済政策の重要課題とする。</p> <p>②商業省において輸出促進政策の重要性が低下しない。</p> <p>③十分な要員が配置される。</p> <p>外部条件</p> <p>①輸出入を巡るビジネス環境が極端に悪化しない。</p> <p>②政情が極端に悪化しない。</p>

- 13.5 商業省支援にあたっての留意点
- 商業省への支援にあつては以下の点を注視・留意する必要がある。
- ① 新政権の貿易振興政策
 - ② 新大臣の貿易振興方針
 - ③ 貿易振興に向けた新組織設立の実施状況
 - ④ 他ドナーの支援プログラムと明確なデマケ
 - ⑤ 商業省の支援受け入れ能力（予算、マネジメント及びカウンターパートとなる職員の能力）

附属資料

附属資料 1 : 商業省 貿易振興ロードマップ

Roadmap for Trade Promotion of Ministry of Commerce

1. Background

For the formulation of Roadmap for Trade Promotion of the Ministry of Commerce (MOC), MOC and JICA Project Team has placed importance on the following viewpoints in formulating the feasible and practicable Roadmap for Trade Promotion:

- The Roadmap for Trade Promotion should be formulated with the participation and ownership of MOC members. This participatory approach ensures the continuous commitment of MOC to the implementation of the Roadmap. The Roadmap for Trade Promotion has been formulated through a series of workshops with the participation of MOC.
- The Roadmap for Trade Promotion should be designed to offer an action plan which MOC can follow after the Project. This action plan should be consistent with the National Export Strategy (NES) and the Trade Promotion Master Plan (TPMP).
- The Roadmap for Trade Promotion should be formulated on the basis of the facts and reality. Through the Project, the underlying facts should be collected from the interviews, statistical analysis, and the benchmarking study of the trade promotion organizations (TPOs) in other Asian countries and offered them to MOC for discussions.
- The Roadmap for Trade Promotion should include immediate measures, short-term measures and middle-term measures. These measures should be realistic on the basis of MOC's situation and can be immediately initiated by MOC.
- The Roadmap for Trade Promotion should be formulated by gaining consensus from the stakeholders such as MOC, JICA and other concerned organizations.

A working group of MOC has been formulated to discuss and formulate the Roadmap for Trade Promotion. The Working Group has formulated the Roadmap for Trade Promotion according to the following steps:

Step 1: Current Situation Survey

The current situation of trade promotion of Myanmar is studied. The studied items include export promotion policies, organization of MOC, trade promotion services provided by MOC, needs of the private sector for trade promotion services, experience of other TPOs in Asian countries and so on.

Step 2: Gap Analysis and Identification of Priority Issues

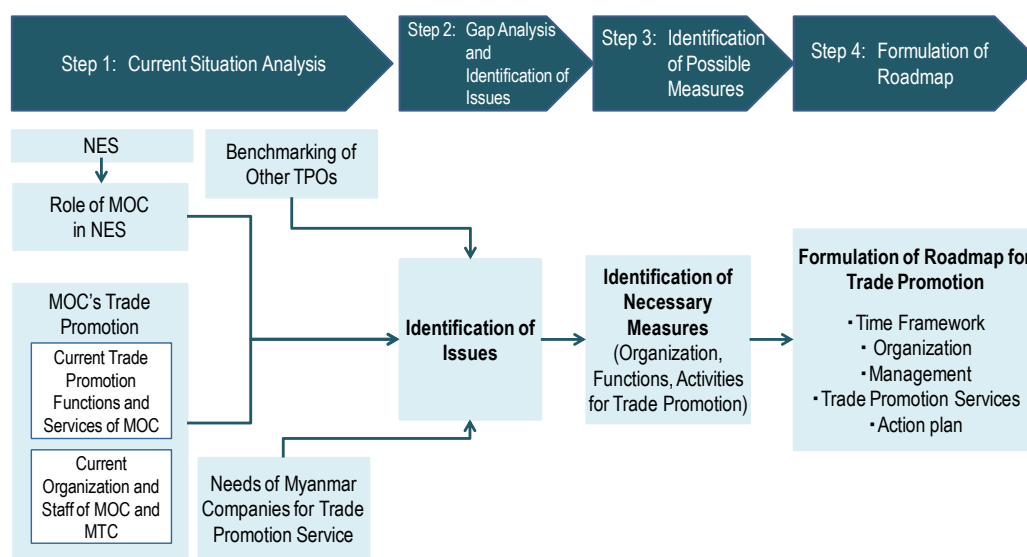
Based on analysis of the current situation, issues of trade promotion in Myanmar are examined and identified.

Step 3: Identification of Possible Countermeasures

Countermeasures which MOC can take to solve the issues are identified.

Step 4: Formulation of Roadmap for Trade Promotion

Based on the result of Step 1 - Step 3, a roadmap for trade promotion is formulated by compiling recommendations for MOC on how to enhance its trade promotion.



Source: JICA Project Team

Figure 1: Process of Formulating Roadmap for Trade Promotion of MOC

2. Approaches to the Formulation of Roadmap for Trade Promotion

Considering the current constraints of Myanmar’s export, it is decided that the Roadmap for Trade Promotion should be formulated on the ground of the following perspectives.

1) The Roadmap should decide requisite role and functions of trade promotion according to the current export stage of Myanmar.

The priority task of a trade promotion organization (TPO) changes according to the following factors:

- Progress of industrialization and change in industrial structure of economy
- Change in comparative advantage of export products
- Progress of the globalization of the private sector
- Increase in export-oriented foreign direct investments (FDIs) into the country, etc.

The major export items of Myanmar are commodities, resource-based products and labor-intensive products. This fact can be understood from the priority sectors chosen by NES.

Export-oriented manufacturing sector is still at the early stage in Myanmar even though garment is

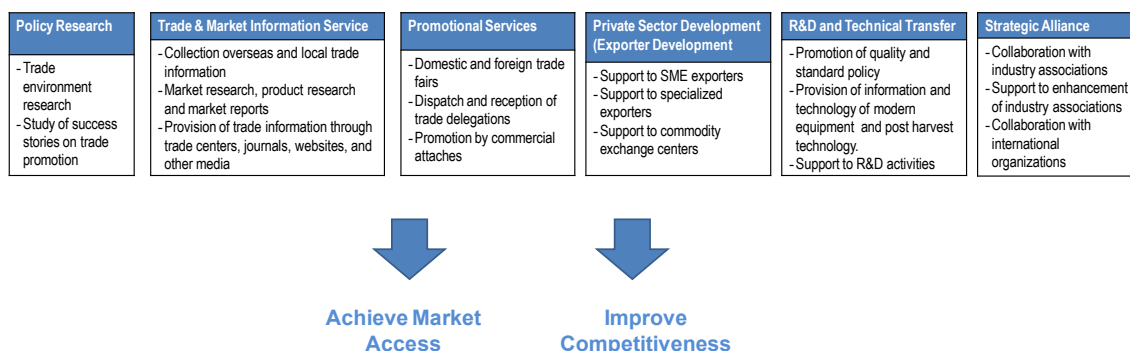
one of the major export items and investments in export-oriented FDIs has been underway, for example, into the Thilawa SEZ, and shows a growth trend.

Accordingly, role and function of export promotion by MOC should meet the current export structure of Myanmar.

2) The Roadmap should show the course of developing integrated and proactive trade promotion services.

The variety of trade promotion services currently provided MOC is very narrow and mostly limited to the provision of trade information (which mainly focuses domestic trade information such as commodity prices and transaction volumes), trade fairs, and a limited scale of consultation.

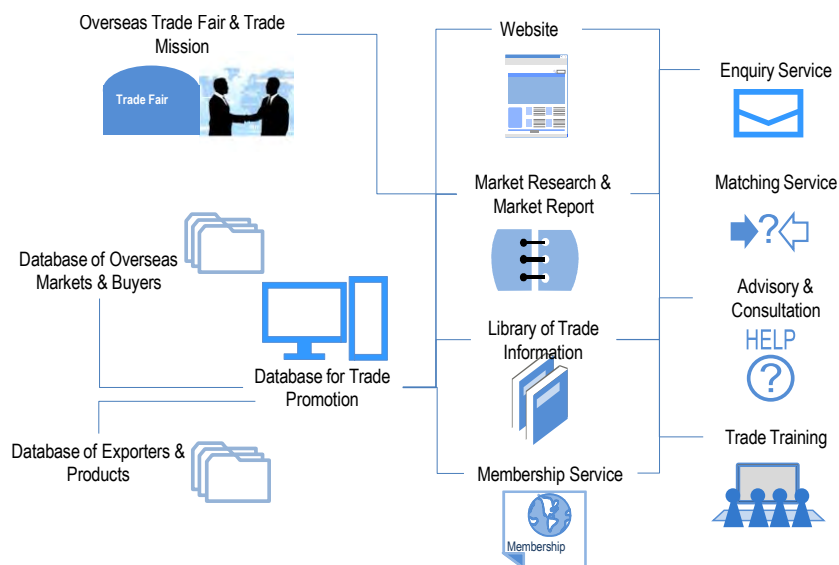
MOC has identified necessary trade promotion services and advocated in TPMP. However, the detail design of those trade promotion services is still at a development stage and it is a long way until MOC will be able to provide trade promotion services which compare favorably with other TPOs.



Source: JICA Project Team

Figure 2: Proposed Measures in Trade Promotion Master Plan (TPMP)

Trade promotion services are inextricably linked. Information and database are basic element of trade promotion services. A variety of services are provided on the basis of information and database. It is necessary to design an organizational structure and enhanced services that realize integrated trade promotion services so that exporters and importers can enjoy the services in a coordinated way.



Source: JICA Project Team

Figure 3: Concept of Integrated Services of Trade Promotion

- 3) **It is necessary to have an approach of exporter development including SME exporters which exceeds trade promotion in a narrow sense.**

The development of new exporters is one of essential approaches for export development. In such case, it is important to support new exporters, mostly SMEs, since they have insufficient experience in international trade, insufficient access to trade information and overseas markets.

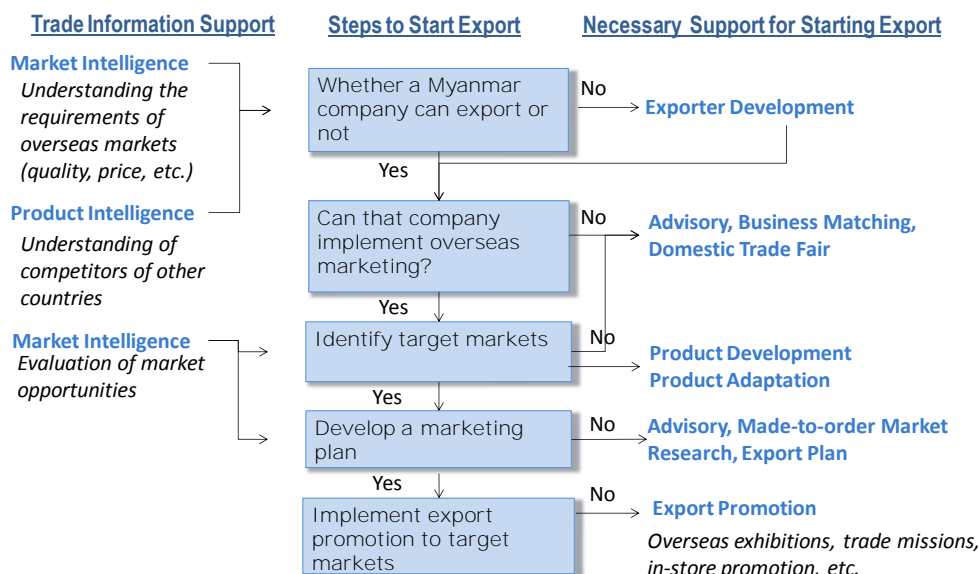
One of the characteristics of Myanmar’s case is that DTPCA is deeply involved in wider issues related to trade promotion. Firstly, the duties of DTPCA include R&D and technical transfer for the technical improvement of Myanmar producers such as farmers, handicraftsmen, distributors, etc. DTPCA promotes the development of commodity centers and operates testing laboratories. Secondary, as the secretariat of MTDC, DTPCA coordinate huge number of activities/projects of NES. These activities include projects in the area of logistics, trade finance and quality improvement as well as sector strategies.

- 4) **The Roadmap should have an approach of providing adequate support to exporters according to the stages of growth.**

The provision of promotional support in an integrated manner to potential exporters is effective helping them to be more competitive in overseas markets and become successful exporters. An applicable way is the combination of market information services, advising, marketing promotion support, and exporter development including trade training. If trade financing is added, the support would be more effective.

The necessary support to an exporter differs according to the level of exporter’s capability and experience in export business. The following figure explains what kinds of support are appropriate

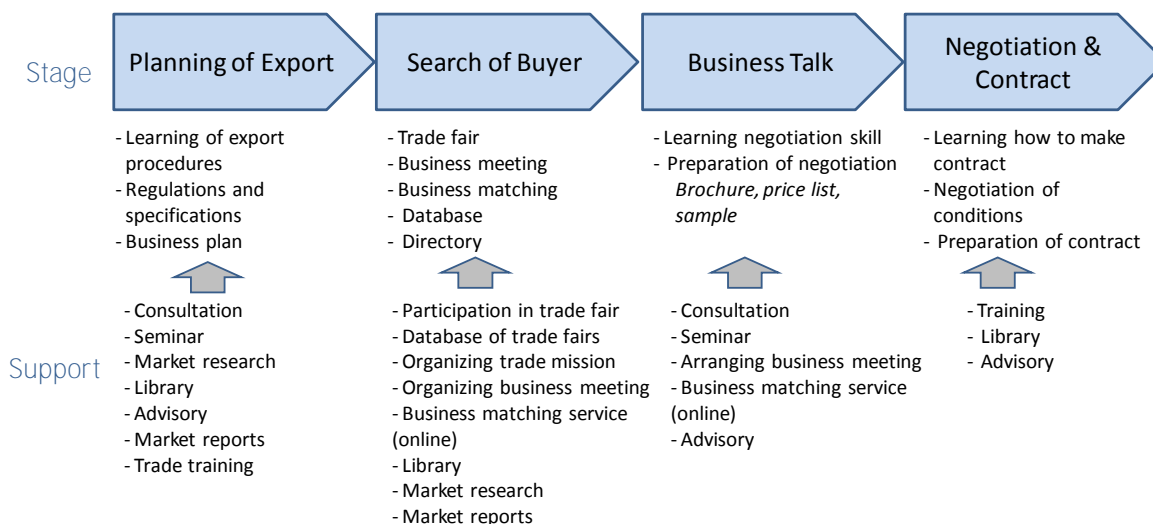
by level of an exporter.



Source: JICA Project Team

Figure 4: Necessary Support by Level of Exporter

A combination of various trade promotion services is also an effective support to an exporter in the process of an export business from export planning, marketing, negotiation until contract. Therefore, it is desirable to have a menu of trade promotion services that can cover the needs of exporters in the process of export marketing.



Source: JICA Project Team

Figure 5: Step-wise Support from Export Planning until Contract

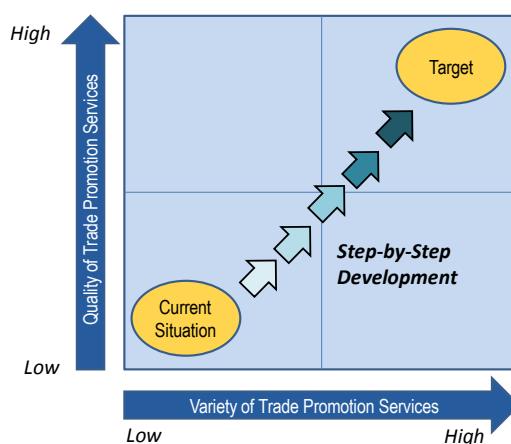
5) The capacity development should be given the priority to strengthen the trade promotion function of MOC.

The Department of Trade Promotion (DTP) was established in 2013 and changed to the Department of Trade Promotion and Consumers Affairs (DTPCA) in 2015. As trade promotion services have not yet fully introduced and established at MOC, officers and staff of MOC have very limited knowledge and experience in providing effective trade promotion services. Thus, capacity development of officers and staff must be important part of the Roadmap.

6) The Roadmap should show a course of step-by-step development of trade promotion function.

As mentioned in the previous chapters, the quality of trade promotion services of MOC is still at an initial stage. There is a large gap between Myanmar where the economy has just recently opened up and the advanced ASEAN countries in terms of resources, experience, and capabilities of trade promotion.

The contents and quality of trade promotion services of MOC can be upgraded by accumulating capabilities and experience steadily. The important point is that the provision of all trade promotion services at a high quality level cannot possibly be achieved overnight. It is practical to strengthen the trade promotion services step-by-step starting from basic services, although targeting a goal for the future.



Source: JICA Project Team

Figure 6: Step-by-step Enhancement of Trade Promotion Services

7) MOC should play as the focal point of export promotion in Myanmar and facilitate the collaboration of stakeholders.

The Myanmar government has developed and implements NES by involving various stakeholders such as ministries, associations, service providers and international organizations. DTPCA of MOC plays the role of focal point of national export strategy.

MOC is not the sole organization which provides trade promotion services in Myanmar. Several ministries also provide export promotion services to their relevant sectors. In the private sector,

UMFCCI and the member associations provide trade promotion service such as business matching, trade fairs, trade missions, business seminars, and trade training. There are also private service providers that provide training programs in business management and international marketing and extend consultation services to private companies. Still the supply of trade promotion services does not meet the demand. DTPCA is expected to facilitate trade promotion services of all stakeholders.

Accordingly, DTPCA needs to be enhanced and transformed to be a full-fledge trade promotion organization in order to be the focal point of national trade promotion and to strengthen public and private collaboration in national trade promotion.

8) It is necessary to establish an organizational culture and a way of working based on business-oriented mindset for effective customer-friendly trade promotion services.

The organization culture and management of MOC has the nature of bureaucracy. Even though it is a public organization, administration of TPO should have business-minded culture as a service provider or facilitator for trade promotion characterized by i) focus on good service, ii) strong motivation for work, iii) professionalism, and iv) loyalty for customers.

3. Timeframe of Roadmap for Trade Promotion

The measures for strengthening trade promotion should be implemented in a phased manner because catch-up with the advanced TPOs in the neighboring countries cannot be realized overnight. The time framework for strengthening the trade promotion function can be broadly divided into the three phases with the objectives listed below: i) immediate action phase (Phase 1), ii) short-term phase (Phase 2) and iii) medium-term phase (Phase 3). Figure 7 explains the three phases of Roadmap for Trade Promotion.

Phase 1: The period to build the capabilities of providing basic trade promotion function (for immediate actions).

Phase 2: The period to catch up with the level of the neighboring ASEAN countries in terms of the scope and quality of trade promotion function (for short-term actions).

Phase 3: The period to realize the excellent level of trade promotion function that can be compared with the neighboring countries (for mid-term actions).

Timeframe for Organization Reform

It is highly needed to change the current organizational structure of DTPCA so that trade promotion services can be provided more smoothly and effectively. The final goal of the organization for trade promotion is a full-fledged TPO such as is seen in other countries such as Thailand and Malaysia. However, the path to the final goal can be taken stepwise considering the existing expertise and

resources of Myanmar.

Phase 1: To implement an organizational change on the basis of existing personnel and existing services in order to realize more effective provision of trade promotion services (for immediate actions).

The existing organization structure is reorganized or modified to set up a department exclusively specialized in trade promotion. The duties and functions of divisions are also examined for better service provision institutional setting.

Organization development measures are introduced to revitalize the organization's performance.

Phase 2: To implement an organizational change to create a firm organization which can effectively provide improved and newly-initiated trade promotion services (for short-term actions).

It is necessary to fundamentally review the organization structure with increased and trained personnel and newly-design trade promotion services.

Phase 3: To implement organizational change to realize the optimum organization and autonomous management with the status of an autonomous body (for mid-term actions).

The organization will be further enhanced and to be transformed to be an autonomous body.

Timeframe for Management Enhancement

Phase 1: To improve the management system that enables the provision of basic trade promotion services (for immediate actions).

Basic management methods and tools are introduced and the intensive training on basic trade promotion service is implemented.

Phase 2: To establish the management system that is common among other TPOs (for short-term actions).

The management methods and tools that are commonly used by other TOPs are introduced and training on in-depth trade promotion service is implemented.

Phase 3: To further improve the management system that is by no means inferior to other TPOs (for mid-term actions).

The management methods and tools are further refined and the capacity development

for high-level trade promotion is conducted.

Timeframe for Strengthening of Trade Promotion Services

Phase 1: To improve basic trade promotion services (for immediate actions).

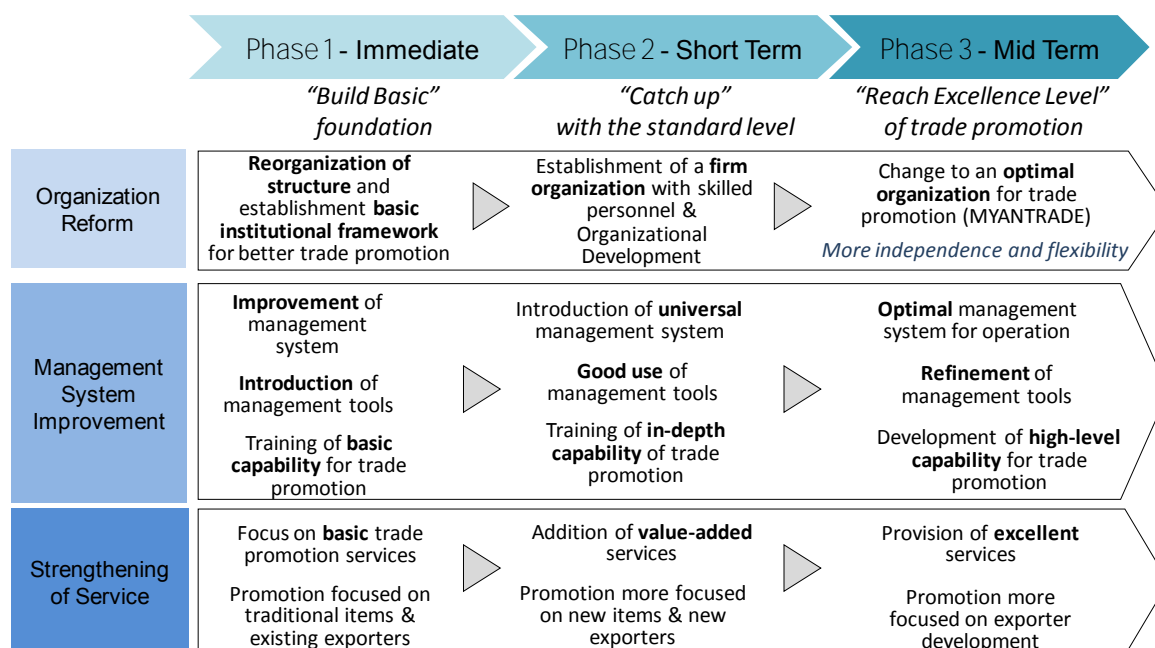
The targets of services are traditional export items and existing exporters.

Phase 2: To realize more value-added services by improving the existing services and designing new services (for short-term actions).

The variety and quality of services are enhanced to be hands-on services. The targets of services give more focus on new export items and the development of new exporters.

Phase 3: To realize excellent trade promotion services at the same level as other TPOs with best practice (for mid-term actions).

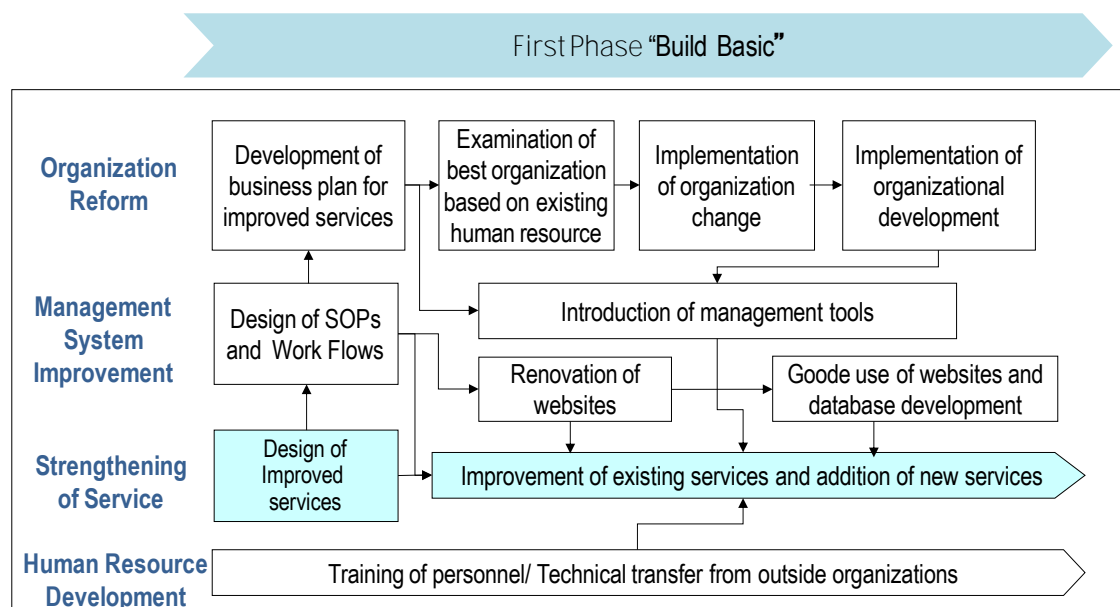
The variety and quality of services are further enhanced responding the needs of the private sector. The targets of services give more focus on exporter development.



Source: JICA Project Team

Figure 7: Three Phases of Roadmap

The workflow within Phase 1 for immediate action is shown in Figure 8. This is a start-up stage to concentrate on the establishment of basic foundation for trade promotion. All the measures should be conducted at the same time in an interrelated manner.



Source: JICA Project Team

Figure 8: Framework of Immediate Action Phase (Phase 1)

4. Management Enhancement Plan

4.1 Basic Policies for Management Enhancement

The transformation of DTPCA into a trade promotion organization is one of strategic objectives of NES (Activity No. 4.1.1). MOC plans to upgrade its trade promotion department into a trade promotion organization (TPO), as a stand-alone organization similarly to other ASEAN countries, to act as a key focal point for trade information (and trade promotion) network.

At the establishment of new TPO organization, organization and management reform with clear strategic direction and strong leadership is important to overcome various internal and external constraints of trade promotion in Myanmar.

The followings are basic policies for management enhancement.

1) It is necessary to establish stronger leadership in trade promotion.

In the Roadmap, organizational changes are proposed. A new organization should extend strong leadership and commitment internally and externally. It is necessary to design an organizational structure which enables the new organization to become a stronger promoter of trade in Myanmar assuming the leadership role in trade promotion and business environment improvement.

2) It is necessary to modify an organization structure so that a satisfactory level of trade promotion services can be provided effectively.

There is no single unit which is specialized in trade promotion under MOC. Therefore, it is

necessary to establish an organization with expertise in trade promotion and sufficient allocation of resources so that various trade promotion services are provided effectively.

- 3) It is desirable to streamline the decision making process and delegate more authority to lower levels for quick and flexible decision making.**

With organizational change, the decision making process should be also examined. Trade promotion services often need a quick decision and action in order to provide customer-friendly services. When designing work flows of services, the reduction of required time of action should be considered.

- 4) It is necessary to give the priority of the human resource development (HRD) in order to improve the service level of trade promotion.**

The personnel in charge of trade promotion at MOC currently do not possess sufficient knowledge and experience in trade promotion services. Therefore, it is necessary to provide intensive training to them. The area of training ranges from basic items such as export/import procedures, laws and regulations, overseas market information, etc. to specific skills such as market research, trade consultation, exporter development, etc.

As for the training of personnel, it is useful to ask the collaboration of the Trade Training Institute and seek the assistance from possible domestic service providers, donor organizations, other TPOs and so forth.

- 5) It is useful to introduce management methods and tools which are widely used by the private sector as well as other TPOs for effective management of trade promotion function.**

The users of MOC's trade promotion services are mostly the private sector: Myanmar exporters and overseas buyers. Their demand level is not low.

It is useful to consider the introduction of management tools such as performance evaluation, the standard operating procedures (SOPs), quality management, balanced scorecard, etc. for the systematical and effective management of trade promotion services.

- 6) It is useful to conduct benchmarking of other TPOs in order to learn how to improve the organization, management and services for trade promotion.**

MOC's working group members for the JICA Project studied the experience and best practices of other TPOs. This study offered a wide range of useful lessons for the improvement of trade promotion of Myanmar.

It is important to continue the benchmarking of best practice of similar organizations in examining an organization structure, improving management system and developing more effective trade

promotion services.

7) It is necessary to consider the allocation of minimum necessary budget and human resource.

The insufficient budget is a big constraint of trade promotion of MOC. Even though the budget of MOC is limited, it is desirable to secure minimum budget for trade promotion by examining its cost-effectiveness.

The framework of management enhancement for MOC’s trade promotion can be summarized as shown in the following table.

Table 1: Framework of Management Enhancement

Management Components	Contents
Policy Framework	<ol style="list-style-type: none"> (1) To enhance the capability of MOC as the focal point of the implementation of NES. (2) To place a policy priority on the capacity development of MOC (DTPCA/new TPO). (3) To create a truly competent TPO in Myanmar by implementing organization reform of DTPCA and developing the capability of trade promotion.
Vision	<p>“Develop Myanmar’s export for the sustainable socio-economic development of the Nation through provision of effective trade promotion and development of competitiveness of Myanmar products and services.”</p>
Mission	<ol style="list-style-type: none"> (1) To support the market access by Myanmar products to overseas markets. (2) To increase the competitiveness of Myanmar products. (3) To promote the diversification of export products of Myanmar. (4) To develop new Myanmar exporters. (5) To promote the implementation of National Export Strategy. (6) To support the capacity development of trade business support institutions.
Strategy	<ol style="list-style-type: none"> (1) To enable business-minded and customer-oriented trade promotion services. (2) To enrich the quality of trade promotion service. (3) To realize effective operation of trade promotion services. (4) To develop competencies of personnel at a maximum. (5) To realize motivated organization culture.
Organization Reform	<ol style="list-style-type: none"> (1) To establish an organization that can effectively provide integrated trade promotion services (2) To realize simple, flexible and smooth operation and avoid the complexity of line of reporting (3) To create business-oriented mind-set and work culture among the personnel (4) To set up a department or an organization that is responsible only for trade promotion (5) To move some of trade promotion function in Nay Pyi Taw to Yangon (6) To establish good work collaboration network among MTC and regional trade centers by reviewing the scope of MTC and regional trade centers
Management System	<ol style="list-style-type: none"> (1) To establish a strong planning function and an administration function (2) To establish workflows and procedures of trade promotion services (3) To introduce management tools which are effective for management improvement (4) To clarify the line of command and job assignment (5) To learn the best practices of other TPOs and design new services

Roadmap for Trade Promotion of Ministry of Commerce, Myanmar

		(6) To implement the above enhancement of management step by step
	Human Resource Management	<ol style="list-style-type: none"> (1) To implement comprehensive human resource development plan (2) To conduct human resource management based on personnel evaluation (3) To realize job rotation for the right person in the right place (4) To develop capable personnel who can be core members for trade promotion (5) To make use of sources of capacity development such as TTI and technical assistance of internal organizations
	Service Operation (Trade Promotion Services)	<ol style="list-style-type: none"> (1) The Trade Promotion Service Enhancement Plan covers all trade promotion services which are common and important (2) The service enhancement will be implemented according to the timeframe of Roadmap (3) The actions for service enhancement will be designed by examining carefully the needs of exporters and overseas buyers and best practice of other TPOs (4) The implementation of actions should be fully supported by the measures proposed in the Management Enhancement Plan
	Allocation of Resources (Budget, HR)	<ol style="list-style-type: none"> (1) To increase the budget for trade promotion service by searching for all possible (2) To focus on cost-effectiveness of activities and programs

Source: JICA Project Team

4.2 Assumed Vision and Mission for Trade Promotion

The ongoing National Export Strategy (NES) is the national-level policy of export development of Myanmar. At the same time, MOC has introduced the Trade Promotion Master Plan (TPMP) for the enhancement of MOC's trade promotion. Under these circumstances, the necessary policy framework of Roadmap for Trade Promotion is as follows:

- i) To enhance the capability of MOC as the focal point of the implementation of NES.
- ii) To place a policy priority on the capacity development of MOC (DTPCA/new TPO).
- iii) To create a truly competent TPO in Myanmar by implementing organization reform of DTPCA and developing the capability of trade promotion.

Following the contents of NES and TPMP, vision, mission and strategy for the trade promotion of MOC and the Roadmap for Trade Promotion are assumed to be as follows:

Vision

“Develop Myanmar’s export for the sustainable socio-economic development of the Nation through provision of effective trade promotion and development of competitiveness of Myanmar products and services.”

Mission of MOC (or New TPO)

- (1) To support the market access by Myanmar products to overseas markets.
- (2) To increase the competitiveness of Myanmar products.
- (3) To promote the diversification of export products of Myanmar.
- (4) To develop new Myanmar exporters.
- (5) To promote the implementation of National Export Strategy.
- (6) To support the capacity development of trade business support institutions.

Strategy

- (1) To enable business-minded and customer-oriented trade promotion services.
- (2) To enrich the quality of trade promotion service.
- (3) To realize effective operation of trade promotion services.
- (4) To develop competencies of personnel at a maximum.
- (5) To realize motivated organization culture.

The above-mentioned vision, mission and strategy are subject to further examination and modification.

4.3 Organization Reform

Objectives of Organization Reform

The organization reform will be conducted with the following objectives:

- 1) To establish an organization that can effectively provide integrated trade promotion services**
 - In order to change the traditional export structure, MOC needs to significantly promote the diversification of products and markets, quality management, skilled labor force, infrastructure, technology for value added production, innovation, and linkages between investment and exports.
 - It is necessary to examine the optimal organization that can realize the provision of services in an integrated way.
 - It is recommended that a new organization start with a simple structure and be an organization divided by service.

2) To realize simple, flexible and smooth operation and avoid the complexity of line of reporting

- It is also necessary to review the organization structure for trade promotion in order to realize clear-cut and flexible decision-making and provision of services.

3) To create business-oriented mind-set and work culture among the personnel

- It is desirable to create a business-oriented mind-set in order to provide hands-on export support services. Possible measures are value sharing, management by objective, planned career development, etc.

4) To set up a department or an organization that is responsible only for trade promotion

- Under DTPCA, several divisions currently engage in trade promotion services. The scope of responsibilities is too wide for one department. It is desirable to establish a new department that is specialized in trade promotion due to the following reasons:
 - * Management can be conducted more consistently by focusing on trade promotion.
 - * The roles and functions will be clearly understood in the eyes of others
- When this department accumulates sufficient expertise of trade promotion and acquires proactive work culture, the establishment of an independent body becomes an option of more effective organization.

5) To move some of trade promotion function in Nay Pyi Taw to Yangon

- Myanmar Trade Center (MTC) in Yangon serves as the one-stop service center of trade promotion service of MOC. MTC handles all inquiries about all trade promotion services. It is desirable to move a part of trade promotion function from Nay Pyi Taw to Yangon in order to respond to inquiries timely and to the point. This is also effective for enhancing the function of market information.

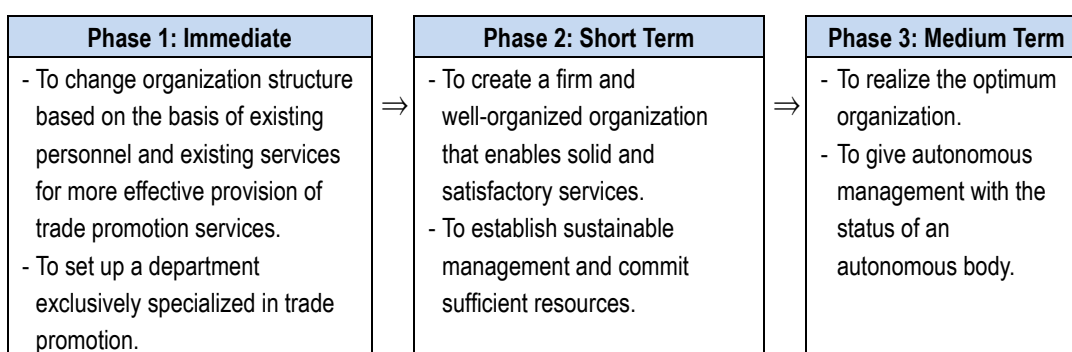
6) To establish good work collaboration network among MTC and regional trade centers by reviewing the scope of MTC and regional trade centers

- Information sharing among MTC and regional trade centers should be enhanced. It is necessary to link MTC and regional trade centers with internet and a market information database. Human interaction will also strengthen mutual understanding and knowledge sharing.

Actions for Organization Reform

1) To implement organization reform according to the timeframe of Roadmap

- MOC will plan and implement the change of organization structure according to the needs from the country's export development and the changing needs of the private sector. It is observed that a newly-established trade promotion organization often starts with simple organization by service.
- MOC currently plans to establish a new department to be the Myanmar Trade Promotion Organization (Myantrade) under MOC in 2016 by separating the existing DTPCA. This organization will have a simple structure by combining the existing units in charge of trade promotion and setting up a division of R&D.
- When this new department becomes able to provide basic trade promotion services and accumulate a certain level of experience and knowhow, the organization structure will be re-examined to be more appropriate for the needs.



Source: JICA Project Team

Figure 9: Steps of Organization Reform

2) To redesign its organization structure responding to the external/internal business environments and needs for trade promotion and implement structural change timely when needed

- It is necessary to examine the current situation and strategy for the future in designing a new organization structure. An organization structure should reflect all the aspects of strategy, scope of trade promotion service, philosophy of administration and the will of management.
- In order to design an appropriate organization structure, the following factors need to be examined.

i) Necessary and optimal set of functions and services.

An organization structure of TPO is decided according to the scope of services that this TPO plans to render. The balance of effectiveness and simplicity of an organization is important. Especially, the functions of domestic trade promotion and SME development need careful consideration whether they are included or not and what level of importance should be given. The establishment of overseas branches is also considered from the aspect of

available budget and capable human resource.

ii) Selection of status of trade promotion organization (TPO)

At the decision of a status of TPO, merits and demerits of options should be examined considering the current export situation and policy environment.

iii) Optimal/minimum size of organization

DTPCA has a sufficient number of personnel even though most of them have insufficient expertise and experience. The optimal or minimum size of unit(s) for various trade promotion services should be examined from the viewpoints of resources and needs for trade promotion.

iv) Sequence of organizational reform

A stepwise approach to strengthening of trade promotion is necessary. The sequence of the organizational reform should be evaluated from the viewpoints of impact and ease of implementation and effectiveness.

v) Optimal job flow for trade promotion

The optimal job flows and collaboration among units for provision of trade promotion services should be examined in designing an organization.

vi) Optimal organizational layers and decision making process

The optimum layers should be examined for effective service provision. Simplifying the organizational layers and decision making processes is desirable.

vii) Required capabilities and resources

The flexible allocation of human resources and budgets is an important issue in designing the optimal organization for trade promotion. They are one of the key preconditions of organization design.

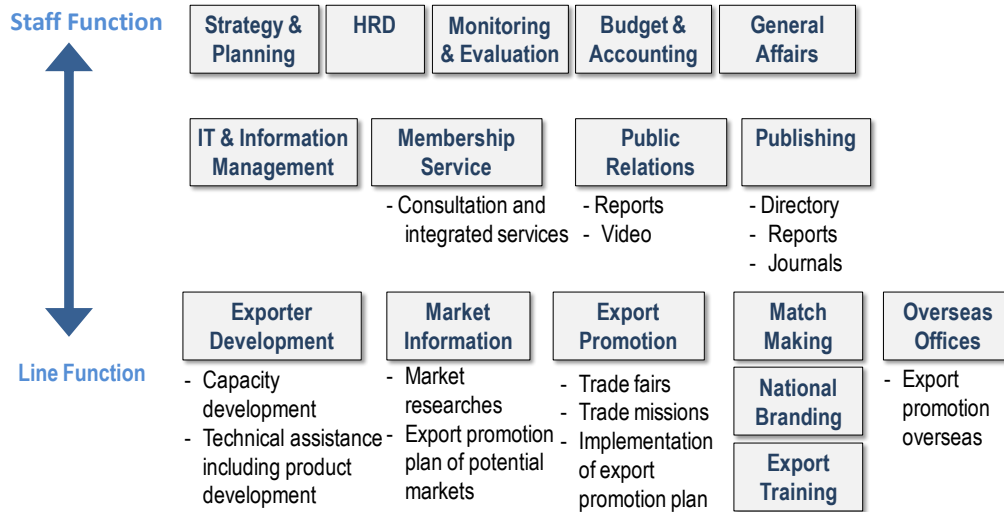
Model Organization Structure for Trade Promotion Organization

It is recommended that an organization by service is appropriate as a trade promotion organization of Myanmar due to the following reasons:

- i) MOC has not established a basic menu of trade promotion services and it is necessary to concentrate on develop sufficient foundation of each trade promotion service for a time. An organization by service is suitable for the development and enhancement of individual trade promotion service. Within a short-term, the same situation may continue.
- ii) Most MOC personnel have not been well-trained and possessed sufficient experience of actual trade promotion services. An organization by service gives an opportunity of learning of trade

promotion services in a shorter period. If necessary, rotation of personnel is conducted for career development of personnel.

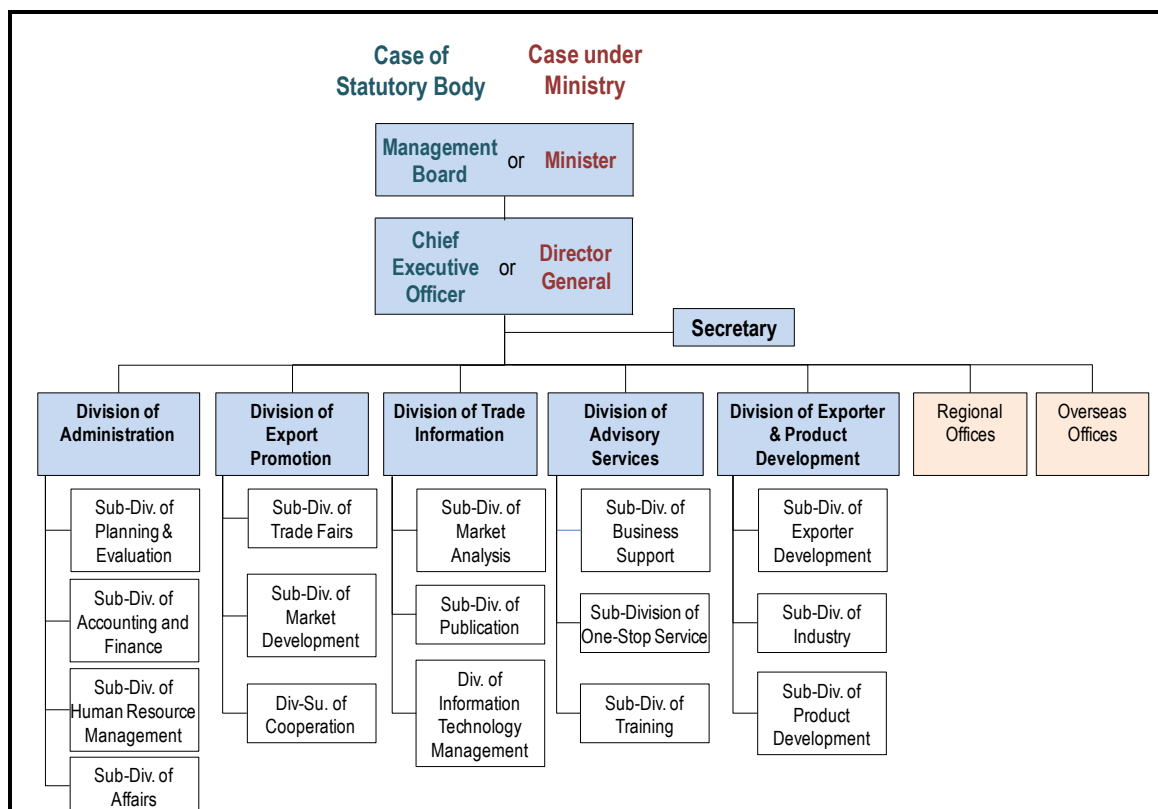
An organization structure is basically designed by grouping and linking the functions and activities that the organization should perform. A trade promotion organization generally has the following functions. They can be classified into staff functions, line functions and functions between them.



Source: JICA Project Team

Figure 10: Functions Required for Trade Development

A model organization structure for Phase 2 (short-term) or after is as shown in the following figure. In Phase 1 (immediate), an establishment of a new department is planned by separating the existing DTPCA. It is planned that this new department will develop and enhance very basic trade promotion services and accumulated a certain level of experience and knowhow. After this period of building basic capability, the department will be ready to move on to the next step, as the organization shown in the following figure, to provide wider range of services with accumulated know-how and trained personnel.



Source: JICA Project Team

Figure 11: Proposed Model of Organization Structure for Phase 2

The functions by unit of the mode organization structure are described in the following table.

Table 2: Function of Proposed Model Organization Structure

Division/ Sub-division	Function
1. Division of Administration	Supervising and coordinating: - Planning, monitoring and evaluating overall operation - Institutional, administrative, personnel, financial services for all the units
1.1 Sub-Div. of Planning & Evaluation	Responsible for: - Preparation of strategic plan, annual activity plan, etc. - Organizational and institutional development - Monitoring and evaluation of programs/activities
1.2 Sub-Div. of Accounting and Finance	Responsible for: - Budget, accounting, payroll and financial planning & monitoring
1.3 Sub-Div. of Human Resource Management	Responsible for: - Personnel affairs - Human resources development
1.4 Sub-Div. of General Affairs	Responsible for: - Internal rule, regulation, procedure, and administrative service - Management of assets, equipment, household and clerical affairs - Correspondence
2. Division of Export Promotion	Supervising and coordinating: - Trade fair and market development service - Promotion activities in collaboration with external organizations

Roadmap for Trade Promotion of Ministry of Commerce, Myanmar

2.1	Sub-Div. of Trade Fairs	Responsible for: - Overseas trade fair service - Domestic trade fair service
2.2	Sub-Div. of Market Development	Responsible for: - Trade missions - Development of new marketing schemes - Implementation of promotional campaign
2.3	Div-Su. of Cooperation	Responsible for: - Collaboration with domestic organizations - Collaboration with international organizations
3.	Division of Trade Information	Supervising and coordinating: - Market information service and market research activity - Information and data management and website service
3.1	Sub-Div. of Market Analysis	Responsible for: - Collection and analysis of overseas market information - Overseas market survey / research, and regional studies <i>These sub-divisions can be divided into several units by market.</i>
3.2	Sub-Div. of Publication	Responsible for: - Publication of market/trade information - Editing of periodicals
3.3	Div. of Information Technology Management	Responsible for: - Management of database (exporter database, buyer database, market information database, etc.) - Management and maintenance of websites - Management of IT network linking regional offices
		<i>In the case of Myanmar, this sub-division may be in charge of domestic trade information such as prices.</i>
4.	Division of Advisory Services	Supervising and coordinating: - Exporter and buyer support service - Networking and cooperation activity
4.1	Sub-Div. of Business Support	Responsible for: - Exporter support activity and export marketing scheme development - Buyer support activity, and supplier and product finding
4.2	Sub-Division of One-Stop Service (Similar to Myanmar Trade Center)	Responsible for: - One-stop service regarding trade consultation, inquiry, and match-making - Management of library service and display - Inquiry and matching service
4.3	Sub-Div. of Training	Responsible for: - Trade training - Seminars and workshops
5.	Division of Exporter/Product Development	Supervising and coordinating: - Exporter development activity and service - Design and brand promotion activity - Collection of industry data and information
5.1	Sub-Div. of Exporter Development	Responsible for: - Data collection and analysis regarding Myanmar products - Communication with industry associations - Identification of potential exporters and products - Arrangement and provision of technical and marketing supports to potential exporters
5.2	Sub-Div. of Industry	- Field visits for guidance <i>This sub-division can be divided into several units by industry or several sub-division by industry</i>

5.3	Sub-Div. of Product Development	Responsible for: - Collection of information about standards and regulations of overseas markets - Awareness campaign about the intellectual property right - Supports to product/design development of export products
6.	Regional Offices	Responsible for: - Trade promotion activities in regions - Cooperation program with central/regional governments and donors
7.	Overseas Offices	Responsible for: - Trade promotion activities in relevant countries - Collaboration with the governments of relevant countries




Source: JICA Project Team

Implementation Schedule

The implementation schedule of actions for organization reform is as shown in the following table.

Table 3: Implementation Schedule: Organization Reform

Organization Reform			
Action	Phase 1	Phase 2	Phase 3
1* To implement organization reform according to the timeframe of Roadmap	Basic Organization	Firm Organization	Optimal Organization
2* To redesign its organization structure responding to the external/internal business environments and needs for trade promotion and implement structural change timely when needed	Basic Organization	Firm Organization	Optimal Organization

Note:  Core activity period  Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

4.4 Management System

Objectives of Management System Improvement

The management system improvement aims at the following improvements:

1) To establish a strong planning function and an administration function

- Strong planning function and administration function are essential for designing of trade promotion services and effective provision of services. It is necessary to give priority to the establishment of good planning mechanism and reliable and flexible support by an administration unit.
- This becomes more important when an independent TPO is established

2) To establish workflows and procedures of trade promotion services

- MOC has currently established procedures and work flows for some of trade promotion services such as domestic trade information and trade fairs as well as administrative work such as accounting procedures. However, these procedures are not compiled into documents or shared by relevant members.
- Procedures and workflow should be prepared by including target level of service, appropriate work process, necessary resource, and required competencies of persons in charge.

3) To introduce management tools which are effective for management improvement

- Management tools commonly adopted by private enterprises are effective tools for the improvement of management of DTPC or new organization. Typical management tools are standard operating procedures (SOPs), preparation of manuals and guidelines, and management by objectives.

4) To clarify the line of command and job assignment

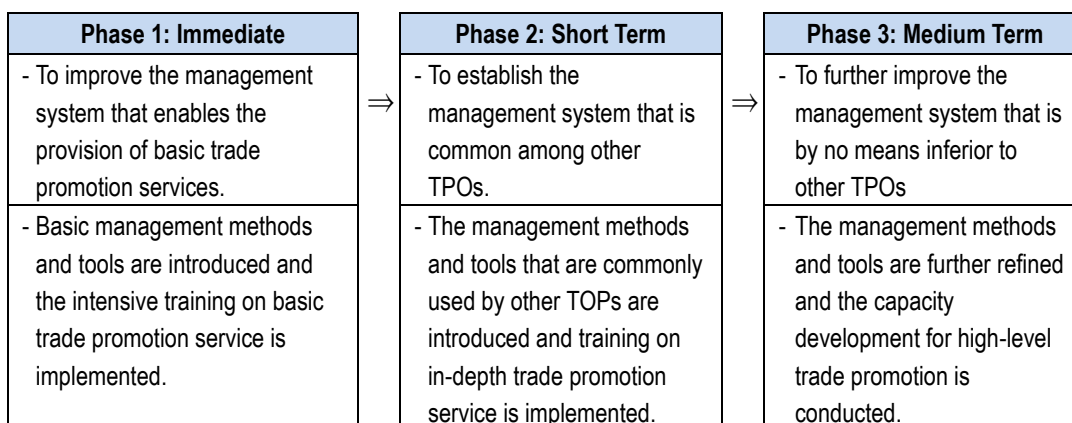
- It is observed that the understanding about assigned tasks and how to implement them is often low among MOC officers and staff in charge of trade promotion. A line of command is sometimes not clear.
- It is necessary to clarify job assignment (job descriptions) and establish the line of command. It is more desirable to minimize decision-making process through reducing decision steps and delegation of authority.

5) To learn the best practices of other TPOs and design new services

- Other TPOs are good source of information about best practice of management. MOC or new organization should continue to learn from other TPOs.

6) To implement the above enhancement of management step by step

- It is important to implement the management enhancement step by step. The good operation of management tools can be achieved by steadily accumulating know-how and experience. It is not realistic to jump to targets without sufficient capabilities.



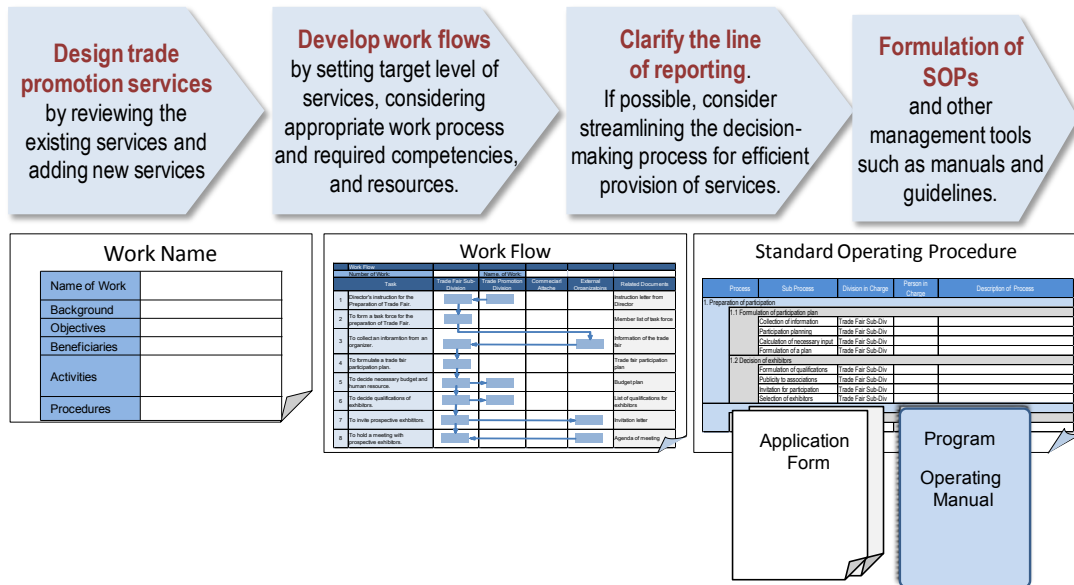
Source: JICA Project Team

Figure 12: Steps of Management Enhancement

Actions for Management System

1) To formulate workflows and clear-cut SOPs for trade promotion activities in order to realize effective provision of services

- Many officers and staff have insufficient experience in trade promotion services and are not accustomed to trade promotion service. Thus, it is necessary to prepare the standard operating procedures, workflows and manuals of trade promotion services so that they can refer to them when necessary in daily jobs.
- This process will be implemented according to the following steps:
 - i) Design trade promotion services by reviewing the existing services and adding new services
 - ii) Develop work flows of trade promotion services by setting target level of services, considering appropriate work process and required competencies, and resources.
 - iii) Clarify the line of reporting of trade promotion services. If possible, also consider streamlining the decision-making process for efficient provision of services.
 - iv) Introduce management tools such as standard operating procedures (SOPs), manuals, guidelines, etc

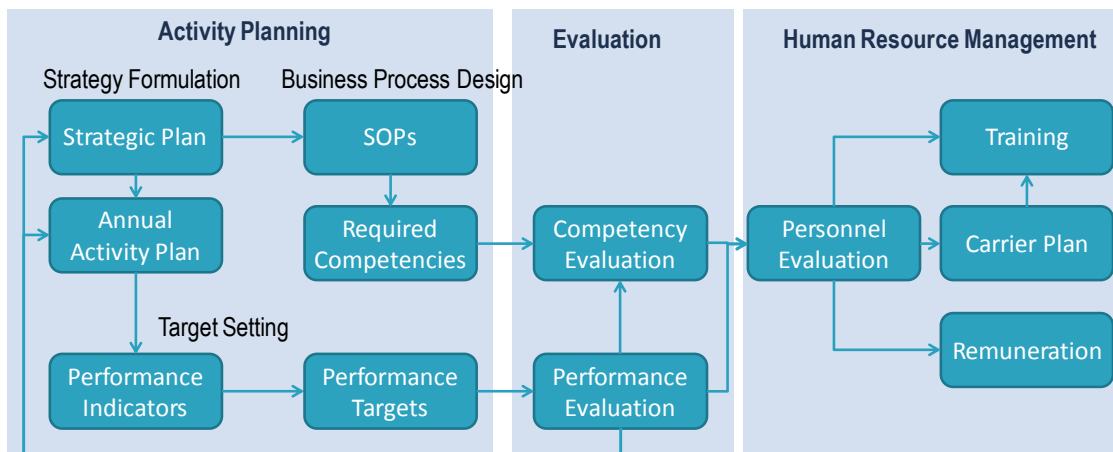


Source: JICA Project Team

Figure 13: Process of SOP Formulation

2) To introduce the management by objectives and performance evaluation

- MOC should set the targets to trade promotion services and periodically evaluate the performance. The targets are set at the unit level and the personnel level. The results of evaluation are used for the improvement of services.



Source: JICA Project Team

Figure 14: Process of Management by Objectives

3) To introduce key performance indicators for annual planning and evaluation

- As most of personnel of MOC are not familiar to the provision of trade promotion service, the introduction of the concept of key performance indicators is useful to promote their understanding of clear objectives and achievements of their tasks.

- As an original usage, key performance indicators are useful for formulating objectives of activities and quantitative/qualitative measurement of achievements.

Table 4: Example of Key Performance Indicators

Indicator	Year 1	Year 2	Year 3
No. of Market Reports			
No. of Trade Fairs Participated			
Amount of Sales Contracts at Trade Fairs			
No. of Outbound Trade Missions			
Amount of Sales Contract by Trade Missions			
No. of Seminars			
No. of Participants of Seminars			
No. of Access to Websites			
No. of Companies of Exporter Database			
<i>Other indicators are to be continued</i>			

Source: JICA Project Team

4) To promote the use of information technology (IT).




- There are many problems for the use of IT at MOC. For example, a personal computer is not allocated to all the officers and staff of MTC. Records of inquiries or consultation are not maintained in the form of database. The websites needs the improvement to be more user-friendly.
- Necessary measures are the digitalization of procedures and documents, training on how to use basic applications, allocation of IT equipment, and use of internet for daily operation.

Implementation Schedule

The implementation schedule of actions for management system is as shown in the following table.

Table 5: Implementation Schedule: Management System

Management System				
Action		Phase 1	Phase 2	Phase 3
1	To formulate workflows and clear-cut SOPs for trade promotion activities in order to realize effective provision of services			
2	To introduce the management by objectives and performance evaluation			
3	To introduce key performance indicators for annual planning and evaluation			
4*	To promote the use of information technology (IT)			

Note:  Core activity period  Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

4.5 Human Resource Management

Objectives of Organization Reform

The organization reform will be conducted with the following objectives:

1) To implement comprehensive human resource development plan

- MOC currently has no specific human resource development (HRD) plan for each officer and staff. Officers and staff do not recognize their own career development plan. It seems that the management chooses participants of training haphazardly. Unclear job assignment is also one of reasons.

It is very necessary to formulate HRD plan of personnel of MOC or new organization and provide effective training based on competencies required for individual officer and staff. The HRD plan must have a viewpoint of improving competencies of personnel to the satisfactory (or target) level of service.

2) To conduct human resource management based on personnel evaluation

- Proper personnel evaluation and feedback is necessary for improving motivation of officers and staff. It is important to conduct personal evaluation in alignment with management by objectives.

3) To realize job rotation for the right person in the right place

- Allocation of the right person for the right place is an effective way of improving the quality and productivity of services as well as motivation of personnel.

4) To develop capable personnel who can be core members for trade promotion

- Knowhow and experience of trade promotion services are very lacking among most personnel of MOC. It is an urgent issue to create competitive personnel for trade promotion.

5) To make use of sources of capacity development such as TTI and technical assistance of internal organizations

- TTI has accumulated training expertise on trade promotion and international business. MOC currently receives training from various international organizations such as ASEAN-Japan Centre, GIZ, CBI and so on. They have established curriculums and experienced lecturers in the area of export promotion, industrial development and so on.

Actions for Human Resource Management

1) To formulate a training plan based on the results of Training Needs Analysis

- A training needs analysis (TNA) aims to identify a gap of existing competencies (knowledge, skills, and attitude) of an officer/staff and competencies required to perform his/her job. MOC should develop a training plan for personnel in charge of trade promotion by conducting TNA. The plan should consist of on-the-job training and off-the-job training.

2) To conduct training for step-by-step capacity development according to the priority trade promotion services and the level of personnel

- MOC should design training courses and curriculums by considering to priority services to be enhanced and how to effectively train personnel in charge of those services step by step. The factors to be considered are method of training such as on-the-job training, off-the-job training or combination of them, training term, level of targets such as beginners, intermediate, or advance, and so on. Post training evaluation is important to increase the effectiveness of training responding the feedback from participants.

3) To formulate a career development plan of personnel from a long-term perspective

- The concept of career development of each officer and staff is important for the human resource development of MOC. It is necessary to develop a training plan considering the career development perspective.

4) To implement the job rotation as a part of career development and allocate the right persons to the right places

- The job rotation should be conducted from the perspectives of career development and allocation of the right person to the right place.

5) To select potential personnel and intensively train them to become key persons of trade promotion, experts of product/market, or trade advisor

- Knowledge and experience of trade promotion are very limited among the personnel of MOC. It would be effective to select a group of potential personnel and provide intensive training in order to realize good trade promotion service in the short term.

6) To utilize the evaluation system of personnel for career development, capacity development, and personnel allocation

- The result of personnel evaluation base on the management by objectives can be utilized for career development, capacity development and personnel allocation.
- Under the management by objectives, in addition to individual performance target, an officer/staff periodically has a meeting with his/her superior to discuss his/her competency improvement, expected role, and how to achieve such a goal of capacity development by both on-the-job training and off-the-job training.

7) To collaborate with TTI for personnel training on trade promotion and international business

- TTI has accumulated curriculums and expertise of training on international trade promotion and international business. TTI has also developed training management capability. However, TTI's assets are not fully utilized for training of MOC personnel on export promotion. It is necessary to prepare curriculums for MOC officers and staff and dispatch them regularly. TTI's training is effective especially for newly-recruited personnel.
- In addition, the Trade Education Department and TTI take initiative to continuously improve its training materials reviewing comments of trainers and trainees.

8) To make use of technical assistance of international organizations for capacity building of personnel

- Advanced TPO in other Asian countries have longer histories and experiences in trade promotion and accumulated know-how. Myanmar can benefit from extensive lessons learned from those experiences by incorporating them into training programs. International organizations offer technical assistance in the area of trade promotion. MOC can use those opportunities for training of personnel.

Implementation Schedule

The implementation schedule of actions for human resource management is as shown in the following table.

Table 6: Implementation Schedule: Management System

Human Resource Management		Phase 1	Phase 2	Phase 3
Action				
1*	To formulate a training plan based on Training Needs Analysis (TNA)	[Gantt bar: Core activity period from Phase 1 to Phase 3]		
2*	To conduct training for step-by-step capacity development according to the priority trade promotion services and the level of personnel	[Gantt bar: Core activity period from Phase 1 to Phase 3]		
3	To formulate a carrier development plan of personnel from a long-term perspective	[Gantt bar: Core activity period from Phase 1 to Phase 3]		
4*	To implement the job rotation as a part of career development and allocate the right persons to the right places	[Gantt bar: Core activity period from Phase 1 to Phase 3]		
5	To select potential personnel and intensively train them to become key persons of trade promotion, experts of product/market, or trade advisor	[Gantt bar: Core activity period from Phase 1 to Phase 3]		
6	To utilize the evaluation system of personnel for carrier development, capacity development, and personnel allocation	[Gantt bar: Core activity period from Phase 2 to Phase 3]		
7*	To collaborate with TTI for personnel training on trade promotion and international business	[Gantt bar: Core activity period from Phase 1 to Phase 3]		
8*	To make use of technical assistance of international organizations for capacity building of personnel	[Gantt bar: Core activity period from Phase 1 to Phase 3]		

Note: [Dark Blue Box] Core activity period [Light Blue Box] Follow-up or periodical review

[Pink Box] Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

4.5.1 Resource Allocation

Resource allocation is recognized as big common obstacle for every aspect of trade promotion enhancement. Necessary measures for resource allocation are separately proposed in this section.

Objectives of Resource Allocation Improvement

1) To increase the budget for trade promotion service by searching for all possible means

- It is necessary to formulate attractive activities and programs and secure necessary budget by appealing the management.
- It is also important to look for possible sources of funds such as associations and international organizations.

2) To focus on cost-effectiveness of activities and programs

- It is necessary to prioritize activities and programs from the viewpoints of the needs and cost effectiveness and allocate the limited budget.

Actions for Resource Allocation

1) To establish planning and implementation mechanism of budgeting for trade promotion programs & activities

- It is necessary to allocate necessary budget for proposed trade promotion services. When MOC develops and selects attractive programs, it is desirable to actively allocate adequate budgets for those programs.

2) To secure a minimum amount of necessary budget

- It is necessary to allocate a minimum amount of budget to cover necessary expenses for services and equipment. The minimum facilities and equipment such as PCs are necessary for operation. Program-base activities can be implemented with budget secured in advance.

3) To promote the collaboration with the private sector and international organizations

- The collaboration with the private sector and international organization is an effective way of cost sharing for priority programs for trade promotion.

4) To consider own revenue from publication, service fees, etc. in the future

- When MOC or new organization becomes able to provide value-added services, it is possible to receive service fees from services, at lease, for cost recovery.

Implementation Schedule

The implementation schedule of actions for resource allocation is as shown in the following table.

Table 7: Implementation Schedule: Resource Allocation

Resource Allocation		Phase 1	Phase 2	Phase 3
	Action			
1	To establish planning and implementation mechanism of budgeting for trade promotion programs & activities			
2*	To secure a minimum amount of necessary budget			
3*	To promote the collaboration with the private sector and international organizations			
4	To consider own revenue from publication, service fees, etc. in the future			

Note: Core activity period Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5. Trade Promotion Service Enhancement Plan

5.1 Basic Policies for Service Enhancement

The basic policies for the Trade Promotion Service Enhance Plan are as follows:

1) The plan covers all trade promotion services which are common and important

The necessary measures for enhancing trade promotion services are examined and formulated for the following services.

Table 8: Proposed Services in Trade Promotion

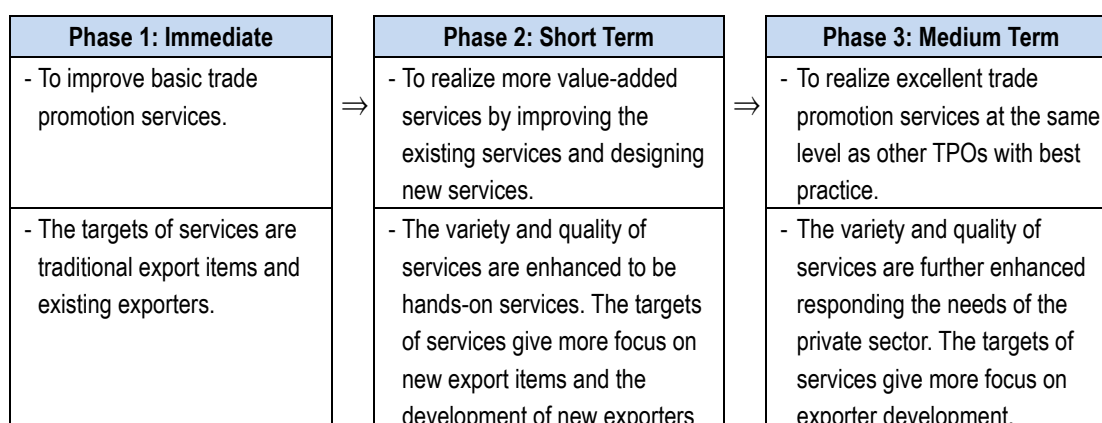
Category*	Services
Market Information	<ul style="list-style-type: none"> - Market information collection - Market research and market intelligence - Market reports - Dissemination of market information
Trade Fair and Exhibition	<ul style="list-style-type: none"> - Outbound and inbound Trade fairs - Outbound and inbound trade missions and delegations
Permanent Display	<ul style="list-style-type: none"> - Display of Export Products
Library	<ul style="list-style-type: none"> - Library service
Consultation & Advisory Service	<ul style="list-style-type: none"> - Consultation for exporters on how to start export - Consultation for exporters on international marketing - Consultation for overseas buyers on business in Myanmar
Inquiry & Business Matching	<ul style="list-style-type: none"> - Exporter/importer database - Reception and introduction of Inquiries
Exporter Development (Including Trade Training)	<ul style="list-style-type: none"> - Capacity development of exporters - Product adaptation - Product development - Quality improvement - National branding
Publication (including PR)	<ul style="list-style-type: none"> - Publications - PR activities
Services of Regional Office	Same services as above
Services of Overseas Office	Same services as above

Note: * Research function for policy advocacy (trade policy, export strategy, etc.) is not included.

Source: JICA Project Team

2) The service enhancement will be implemented according to the timeframe of Roadmap

Trade promotion services are to be enhanced according to the phases: immediate phase, short-term phase and medium-term phase. The proposed measures consist of measures for immediate actions and those for future actions.



Source: JICA Project Team

Figure 15: Steps of Service Development

3) The actions for service enhancement will be designed by examining carefully the needs of exporters and overseas buyers and best practice of other TPOs

Most of the proposed actions are new for MOC and MOC has no proper know-how and experience. Therefore, it is important to learn from cases of other TPOs and check the usefulness and effectiveness of services by listening to feedback from service users.

4) The implementation of actions should be fully supported by the measures proposed in the Management Enhancement Plan

Good services can be possible only on the basis of good management. At first, the capacity development of personnel and formulation of workflows and SOPs will be conducted for effective implementation of the proposed actions.

In this section, the term “DTPCA” means not only the existing DTPCA but also a future organization for trade promotion (TPO) recommended for the organization reform when the organization reform is implemented.

5.2 Trade Information

Actions for Trade Information

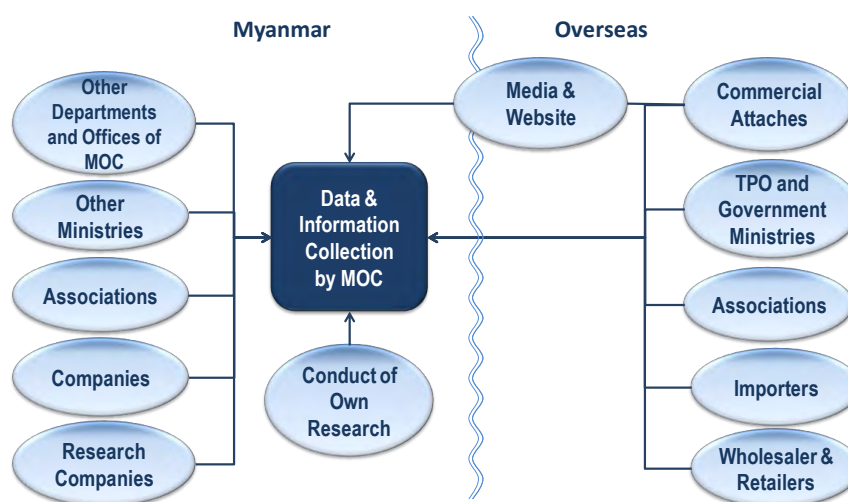
1) To develop a plan for market information development

- Market information is one of the cores of export promotion services. It is necessary to systematically collect data and information, process them and provide market information which is useful for both Myanmar exporters and overseas market.
- As for Myanmar exporters the needs for information about overseas markets such as market potential and various import regulations are high (Box 1). As for overseas buyers, the needs for information about Myanmar suppliers, trade policies, industry trends, and so on are high.

- MOC should formulate a plan of market information development which includes the priority information, methods of provision, and necessary organization. And it is necessary to implement the plan step-by-step.

2) To enhance the collection of data and information by widening sources, especially overseas sources

- It is important to widen the sources of data and information. The major sources of information are the websites and published documents of related ministries, trade promotion organizations, industry associations, etc. Especially, the sources of overseas market are currently weak at MOC.
- In addition to access to the websites, direct request of exchange of publications is the first step of data & information collection. The commercial attachés are also an important source of information collection. Donors such as ITC and EU are also good sources of trade information.



Source: JICA Project Team

Figure 16: Source of Data and Information

3) To prepare guidelines and manuals for market research

- Guidelines and manuals of market research will show research items, how to collect and analyze necessary data & information, and how to write a report. They will give guidance to officers and staff engaging in market research and contribute to the standardization of reports.

4) To implement the capacity development of market research

- The capabilities of market research need further development. A case study method and on-the-job training are effective for training on market research.

5) To improve the quality and increase the variety of market reports by identifying the priority of market information

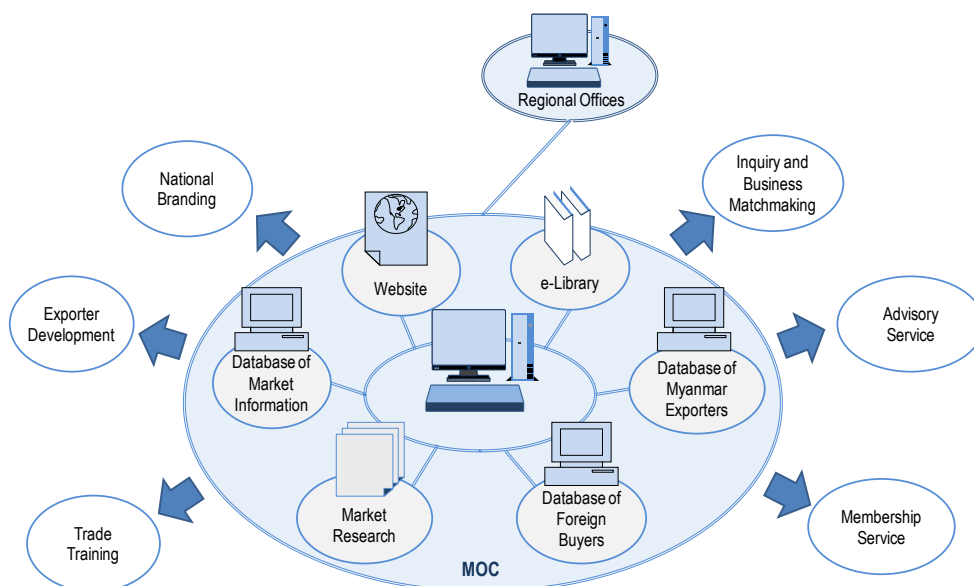
- MOC currently publishes little market news and market reports to Myanmar exporters. In order to expand the information provision to the private sector, it is necessary to improve the quality of market reports and increase the variety of market reports.

Table 9: Examples of Market Reports

<p><u>Types of Reports:</u></p> <ul style="list-style-type: none"> - Market news (information of recent trend and events of markets) - Market briefs (compact information of overseas markets by product and by country/region) - Market intelligence reports (detailed information of overseas market by product and by country/region) - Product intelligence reports (analysis of product competitiveness) <p><u>Purpose:</u></p> <ul style="list-style-type: none"> - Increase the awareness/knowledge of suppliers/exporters - Provide necessary information to policy makers
--

6) To develop database of market information (overseas market information, suppliers, buyers, etc.)

- It is useful to develop a database of market information. The database will be the core source of information for all trade promotion services of MOC.



Source: JICA Project Team

Figure 17: Market Information Database as Core of Trade Promotion Services

- The needs for information differ according to the type of user as shown in the following table.

Table 10: Purpose of Information Collection by Type of User

User	Purpose	Information
Exporters	Finding of target market Understanding market requirements Import procedures of target market Evaluation of potential of market entry Finding of potential buyers	- Trade information (Overseas market information) - Regulations and specifications - Buyers list - Consultation - Matching service - Trade Fairs & Exhibitions
Local Non-Exporters	Being aware of opportunities of export Understanding export procedures and export marketing	- Trade statistics - Market reports - Trade information (Overseas market information)
Overseas Buyers	Evaluation of potentiality as supplier Export procedures of Myanmar Finding of potential suppliers	- Supplier/product information (Supplier Profile) - Export regulation information - Matching service - Exhibitions
Government Organizations	Information for trade policy and trade promotion policy Monitoring of trade trend	- Trade statistics - Market reports

- The database should include at least the following information:

- * Trade statistics (Myanmar and world)
- * Price trends of major product items
- * Laws and regulations of destination countries
- * List of Myanmar exporters
- * Profiles of Myanmar products
- * List of overseas buyers

Table 11: Examples of Major Items of Trade-related Regulations by Country

Categories	Information
Restriction of Countries/Regions	Restricted countries/regions, etc.
Quantitative Control	Prohibited and restricted goods Import quota system, import control list, safeguard provision, anti-dumping measures
Product Safety	Food Sanitation Act, Livestock Importation Act, Standards of Product (e.g. JIS for Japan, BIS for India), the Prevention of Food Adulteration Act & Rules, etc.
Customs Clearance	Pre-shipment inspection (PSI), customs clearance documents, certified importer registration scheme (import licenses), Automated Commercial Environment (ACE) by U.S., Customs-Trade Partnership Against Terrorism (C-TPAT) by U.S., etc.
Tariffs and Duties	Tariff classification, Basic Customs Duty (BCD), Additional Duty (AD), Additional Duty of Customs (ADC), General Systems of Preferences (GSP), preferential tariff, FTA, regional common effective preferential Tariff (e.g. CEPT under AFTA), duty exemption, etc.
Standards	standards of weights and measures, industrial & agricultural standards

	by product (e.g. JIS for Japan, BIS for India), etc.
Certificate	Rules of origin, certificate of origin, application for import certificate, certificates of Import quarantine (e.g. phytosanitary certificate, health certificate, etc.), etc.
Terms of Payment	Regulation for payment for import (payment procedure: Letter of Credit (L/C), Telegraphic Transfer (T/T), import usance, etc.), ceiling of payment by specific countries/products, etc.
Supervisory Authority	Ministry of Trade/Commerce, Customs, Ministry of Finance, Ministries Regarding to products safety, etc.

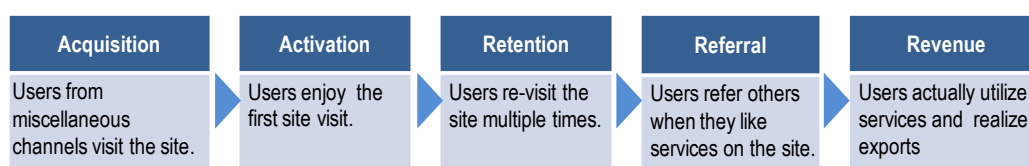
7) To improve websites (targeting overseas buyers)

- The contents of the existing websites of MOC are mostly in Burmese. The contents about international trade promotion are small. It is necessary to renovate the websites and upload information attractive for both Myanmar exporters and overseas buyers. The contents to be uploaded for trade promotion are as follows:

Table 12: Information on Website

<ul style="list-style-type: none"> - Events and news related to trade promotion of exports of Myanmar - Event calendar - Trade promotion policies of Myanmar (including NES) - Schedule of trade fairs in the world and in Myanmar - Trade statistics of Myanmar - Export market information (targeting Myanmar exporters) (market reports, database of regulations and specifications of destination countries, etc.) - Information of Myanmar suppliers/exporters (with product information including photos) - Trade support services of MOC

- The portal site for trade promotion should be developed by renovating the existing website of DTPCA. This is because there is no noticeable portal site for MOC’s trade promotion services even though there are three websites of MOC.
- The portal site of MOC’s trade promotion should increase and enrich contents other than trade information, for example, business matching, membership service and other service menu.
- In order to continuously improve the attractiveness of portal site, it is necessary to monitor users, evaluate their satisfaction and upgrade the contents to meet their needs. The following figure shows the process of creating core users of portal site and offer good reference for portal site improvement.



Source: JICA Project Team prepared based on Dave McClure, “Web Strategy for Pirates: AARRR!!!”

Figure 18: Dave McClure’s Model of Portal Site Development

Implementation Schedule

The implementation schedule of actions for trade information is as shown in the following table.

Table 13: Implementation Schedule: Trade Information

Trade Information		Phase 1	Phase 2	Phase 3
Action				
1	To develop a plan for market information development for export promotion	Core activity period		
2*	To enhance the collection of data and information by widening sources, especially overseas sources	Core activity period	Follow-up or periodical review	
3	To prepare guidelines and manuals for market research		Core activity period	
4*	To implement the capacity development of market research	Core activity period		
5	To improve the quality and increase the variety of market reports by identifying the priority of market information		Core activity period	
6*	To develop database of market information (overseas market information, suppliers, buyers, etc.)	Core activity period		
7*	To improve websites (targeting overseas buyers)	Core activity period	Follow-up or periodical review	

Note: ■ Core activity period ■ Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.3 Trade fair and Exhibition

Actions for Trade Fair and Exhibition

1) To collect the information of world trade fairs

- It is necessary to collect information of world trade fairs. The information can be used for the selection of trade fairs to participate and providing information to Myanmar exporters.

2) To select carefully the priority trade fairs to participate or support Myanmar exhibitors

- MOC currently only participates in trade fairs which offer the space for Myanmar products

and/or provide assistance due to their own budget constraints. It is necessary to increase the opportunities of overseas trade fairs through negotiations with organizer countries after selecting the priority trade fairs.

3) To make use of the opportunity of trade fairs for promotion of national branding

- The trade fairs offer a good opportunity of promoting Myanmar products. It is important to utilize the trade fairs as an opportunity for national branding of Myanmar products.

4) To have a booth at every domestic trade fair and extend trade promotion services

- At the domestic trade fairs, it is important to have a booth of MOC at the prominent place and extend promotion activities for Myanmar exports.

5) To develop standardized and attractive visual identity of display booth, brochure, etc.

- It is useful to prepare visual identity of display and brochures in order to attract visitors and promote the national branding of Myanmar products.

6) To enhance supports to exhibitors/participants

- It is necessary to provide careful and detailed support to Myanmar exhibitors. The support to exhibitors should include advance orientation, arrangement of booths and shipment of samples, arrangement of visas, introduction of potential buyers to invite, support to business negotiations at booths, etc.

7) To follow up the results of trade fairs

- It is important to evaluate the results of trade fairs in terms of the number of visitors, popular products, business transactions by Myanmar exhibitors, etc. and utilize the results for the preparation and selection of exhibitors for the next time.
- It is also important to follow up the business negotiations made at trade fairs by providing support to Myanmar participants.

8) To standardize and monitor domestic trade fairs

- It is necessary to review the standards of domestic trade fair. The standardization of trade fair increases their effectiveness.

9) To plan and organize a nation-level domestic trade fair for export promotion

- It should be considered to periodically organize or sponsor a national-level domestic trade fair. This trade fair is a good opportunity of promoting Myanmar products from all sectors to

international businessmen.

Implementation Schedule

The implementation schedule of actions for trade fair and exhibition is as shown in the following table.

Table 14: Implementation Schedule: Trade Fair and Exhibition

Trade Fair and Exhibition				
	Action	Phase 1	Phase 2	Phase 3
1*	To collect the information of world trade fairs	[Core activity period]		
2	To select carefully the priority trade fairs to participate or support Myanmar exhibitors		[Core activity period]	
3	To make use of the opportunity of trade fairs for promotion of national branding	[Core activity period]		
4	To have a booth at every domestic trade fair and extend trade promotion services		[Core activity period]	
5	To develop standardized and attractive visual identify of display booth, brochure, etc.		[Core activity period]	
6*	To enhance supports to exhibitors/participants	[Core activity period]		
7*	To follow up the results of trade fairs	[Core activity period]		
8	To standardize and monitor domestic trade fairs	[Core activity period]		
9	To plan and organize a nation-level domestic trade fair for export promotion			[Core activity period]

Note: [Dark Blue] Core activity period [Light Blue] Follow-up or periodical review
 [Pink] Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.4 Permanent Display

Actions for Permanent Display

1) To publicize the permanent displays taking every opportunity and possible means

- It is necessary to publicize the permanent displays to attract visitors who visit them.

2) To prepare brochures of displayed products with photos, producer name, specifications, etc.

- It is necessary to prepare a brochure of displayed products at the permanent displays at MTC and regional trade centers for the convenience of visitors.

3) To make the display more attractive with the help of expert

- It is necessary to make more attractive displays with the support of display experts. MTC gives guidance on how to display to the regional trade centers.

4) To plan display with specific theme/objective and periodically change the products

- Periodical change of displayed products will be considered. Display with a specific theme may offer a good opportunity of PR and attract new visitors. Possible themes are: selected best Myanmar products, products of a specific sector, specialty products of a specific region, etc.

5) To organize an event at the permanent display in collaboration with an association

- The space of permanent display such as MTC can be used for an event. Examples are a small trade fair (e.g. a trade fair of MOC-supported products), gathering of exporters and buyers, special event for members of membership services, etc. These events are also useful for the publicity of the permanent display.

Implementation Schedule

The implementation schedule of actions for permanent display is as shown in the following table.

Table 15: Implementation Schedule: Permanent Display

Permanent Display		Phase 1	Phase 2	Phase 3
Action				
1*	To publicize the permanent displays taking every opportunity and possible means	[Core activity period]		
2*	To prepare brochures of displayed products with photos, producer name, specifications, etc.	[Core activity period]		
3*	To make the display more attractive with the help of expert	[Core activity period]		
4	To plan display with specific theme/objective and periodically change the products		[Core activity period]	
5	To organize an event at the permanent display in collaboration with an association		[Core activity period]	

Note: [Dark Blue] Core activity period [Light Blue] Follow-up or periodical review
 [Pink] Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.5 Library

Actions for Library

1) To clarify the target of library and make policies and plan of library on the basis of the needs of users

- It is necessary to make a library plan by defining target users and necessary books. It is useful to check which books, statistics, directories, etc. are common at libraries of TPOs.

2) To consider how to collect necessary books, statistics, directories, etc.

- It is necessary to examine what book stock is priority and how to collect necessary book stock. Types, usefulness and importance of books, statistics, directory and other documents should be examined and collection method should be decided. A way of collecting free is sought, for example, exchange of publication with domestic/international organization. It is necessary to allocate a minimum amount of budget for priority publication.

3) To develop the library management system including collection management

- The library management system to be established should include collection, record of collection, circulation management, reference services, etc.

4) To train librarians on how to manage the library

- For the effective management of library, necessary knowledge and skill as a librarian should be taught.

5) To develop e-library (PC + database) to give digital data of statistics, tariffs, regulations

- The installation of an e-library (PC + database) is a useful way of providing digital data such as statistics and other data in the database.

6) To furnish regional trade centers with a library similar to that of MTC




- It is necessary to set up a library at regional trade centers. The e-libraries of regional trade centers should also be linked with MOC's database.

Implementation Schedule

The implementation schedule of actions for library is as shown in the following table.

Table16: Implementation Schedule: Library

Library			
Action	Phase 1	Phase 2	Phase 3
1	To clarify the target of library and make policies and plan of library on the basis of the needs of users		
2*	To consider how to collect necessary books, statistics, directories, etc.		
3*	To develop the library management system including collection management		
4*	To train librarians on how to manage the library		
5	To develop e-library (PC + database) to give digital data of statistics, tariffs, regulations		
6*	To furnish regional trade centers with a library similar to that of MTC		

Note:  Core activity period  Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.6 Consultation and Advisory Service

Actions for Consultation

1) To intensively train potential personnel by giving knowledge and skills required for consultation service

- The number of officers who can provide hands-on advice on trade promotion is very limited. It is necessary to intensively train potential personnel.

2) To publicize the consultation service to attract more visitors

- It is necessary to publicize the consultation services provided by MTC to Myanmar exporters and overseas buyers. It is useful to open a consultation desk at MOC's booth at domestic trade fairs.

3) To prepare data and information necessary for consultation service

- It is necessary to prepare data and information required for consultation service, such as regulations, market information, etc. in the forms of database, handbooks, etc.
- It is also necessary to formulate a manual for consultation service compiling relevant information mentioned above. This manual can be a useful tool for persons in charge of consultation.


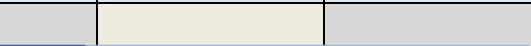

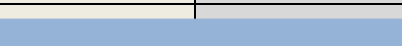



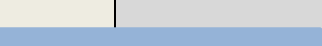
4) To build a collaboration relationship with other divisions in order to provide timely and adequate advice




- MTC is the one-stop window for consultation service. A person-in-charge cannot answer all inquiries. An officer of the unit in charge of an issue will answer the inquiry in that case. It is necessary to develop a collaboration arrangement with related divisions of MOC, Custom Office, related ministries, associations, etc.
- As one of tools for consultation service, it is necessary to prepare a list of resource persons who can answer a consultation.

Implementation Schedule

The implementation schedule of actions for consultation and advisory service is as shown in the following table.

Table 17: Implementation Schedule: Consultation and Advisory Service

Consultation and Advisory Service				
Action		Phase 1	Phase 2	Phase 3
1*	To intensively train potential personnel by giving knowledge and skills required for consultation service			
2*	To publicize the consultation service to attract more visitors			
3*	To prepare data and information necessary for consultation service			
4*	To build a collaboration relationship with other divisions in order to provide timely and adequate advice			

Note:  Core activity period  Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.7 Inquiry and Business Matching Service

Actions for Inquiry and Business Matching Service

1) To advertise inquiry & business matching service on the website

- The recognition level of inquiry service is low. It is important to advertise MOC's inquiry service on the top page of the website.

2) To make use of the opportunity of trade fairs and incoming trade missions for business matching

- Trade fairs and incoming trade missions are good opportunity for business matching. It is necessary to respond the needs of foreign visitors promptly and flexibly by introducing proper

potential partners and arranging business meetings.

3) To prepare a manual and brochure of inquiry & business matching service

- The workflow of inquiry and business matching services has not been completed and shared among MTC and regional trade centers. In addition to SOP, a handling manual of inquiry and matching service should be prepared. It is important to make a brochure of MOC’s inquiry and business matching service and distribute it for promotion of service to visitors to trade fairs, industry associations, embassies, etc.

4) To quickly respond to inquiries (to set a target time of response)

- It is necessary to set a standard time of response to an inquiry in order to realize quick response.

5) To follow up a business transaction after the introduction of potential business partners

- It is necessary to monitor a business transaction after introduce potential business partners.

6) To keep records of inquiries and responses as a digital data

- It is necessary to keep records of inquires including the results of business matching.

Implementation Schedule

The implementation schedule of actions for inquiry and business matching is as shown in the following table.

Table 18: Implementation Schedule: Inquiry and Business Matching

Inquiry and Business Matching Service		Phase 1	Phase 2	Phase 3
Action				
1	To advertise inquiry & business matching service on the website	Core activity period		
2*	To make use of the opportunity of trade fairs and incoming trade missions for business matching	Core activity period		
3	To prepare a manual and brochure for inquiry & business matching service	Core activity period		
4*	To quickly respond to inquiries (to set a target time of response)	Core activity period		
5*	To follow up a business transaction after the introduction of potential business partners	Core activity period		
6*	To keep records of inquiries and responses as a digital data	Core activity period		

Note: Core activity period Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.8 Exporter Development

Actions for Exporter Development

1) To develop product experts at MOC who are in charge of hands-on guidance to potential exporters

- It is important to develop a product expert for a product within MOC. A product expert should have basic knowledge of industry, monitors market trends, periodically communicates with relevant associations and companies, and provide hands-on guidance to potential exporters in the industry. It is desirable that every officer/staff has expertise of a product for at least one industry.

2) To periodically identify potential exporters as the target of exporter development and to provide integrated support to them in order to realize their exports

- It is useful to periodically survey potential exporters and potential products. The results of survey can be used for selecting target companies for exporter development.
- A series of supports are provided to those potential exporters in an integrated way throughout the process of export business.

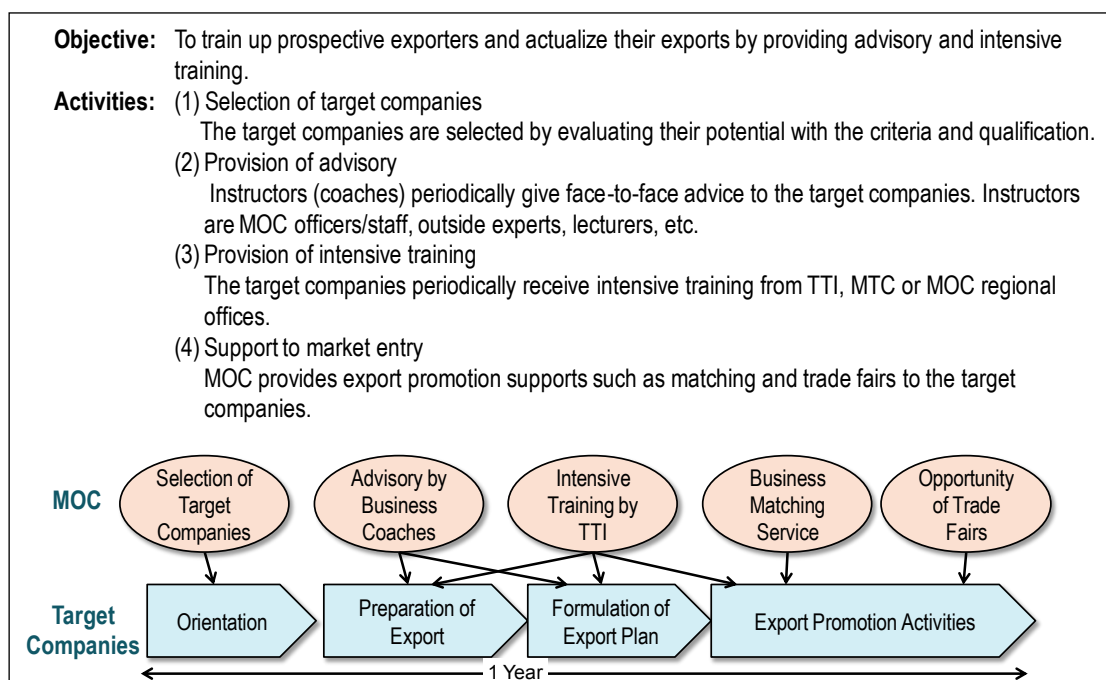


Figure 19: Model of Integrated Exporter Development Program

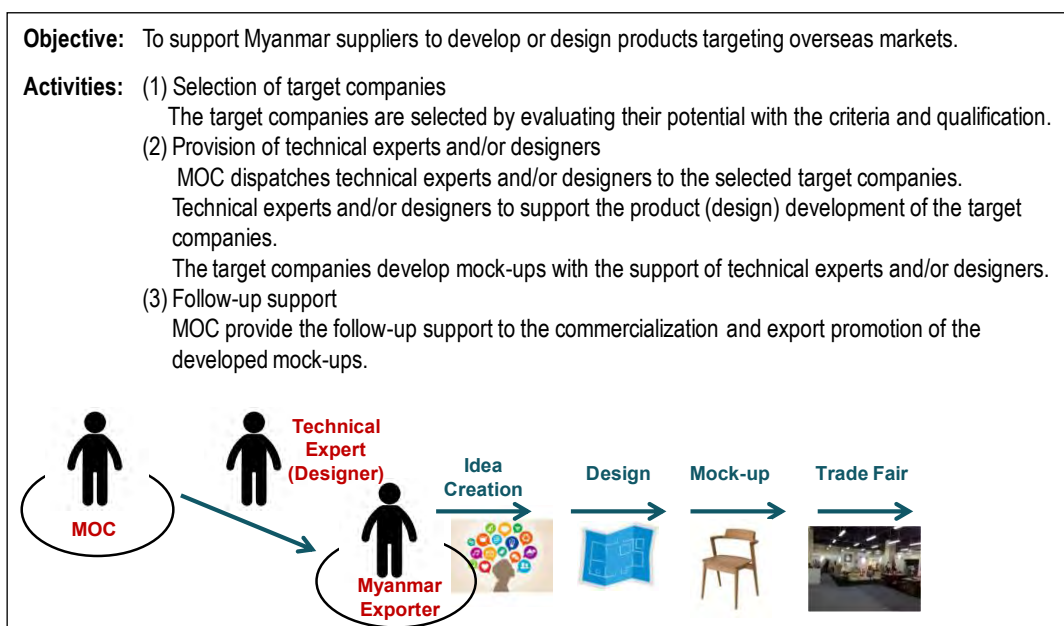
3) To strengthen the collaboration with associations for exporter development

- Exporter development support should include technical training, marketing advice, trade fairs,

etc. Such support can be effectively implemented in collaboration with associations.

4) To provide technical assistance to (potential) exporters in terms of product quality and product design

- MOC dispatch technical experts and/or designers in order to develop or modify Myanmar products to be suitable for entry into overseas markets.
- MOC dispatch designers to Myanmar exporters in order to support their product/package design with attractive design.



Source: JICA Project Team

Figure 20: Model of Product (Design) Development Support Program

5) To design and initiate programs for national branding such as the Myanmar Excellent Product Award and Myanmar Brand Mark

- MOC introduces the Myanmar Excellent Product Award and Myanmar Brand Mark with the purpose of encouraging the product improvement by Myanmar producers and make use of Myanmar Brand Mark as a tool of national branding activities.

Objective: To find and certify excellent Myanmar products
 To authorize them to put the Myanmar Brand mark of their packages
 To make use of Myanmar Excellent Products to improve the image of Myanmar products

Activities: (1) Certification of Myanmar Excellent Product
 MOC evaluates candidate products from the viewpoints of technical quality, design and sales service.
 MOC chooses Myanmar Excellent Products from the candidate products.

(2) Provision of privileges
 MOC entitles the awarded products to use the Myanmar Brand mark.
 MOC preferentially provides export promotion services to the awarded products.

(3) Publicity of Myanmar Brand
 MOC promote the recognition of Myanmar Brand by various means of publicity.

(4) National branding
 MOC utilizes the Myanmar Brand as a means of national branding activities..

Examples of National Brand Marks



Source: JICA Project Team

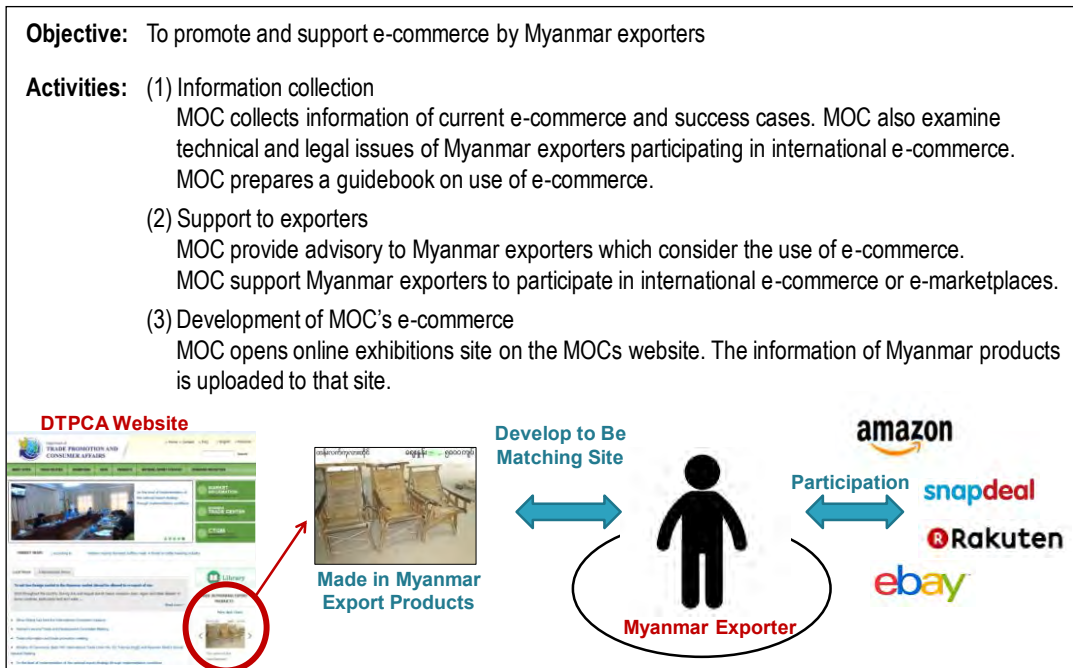
Figure 21: Model of Program for National Branding

6) To support the supply chain development of major export products

- MOC including regional offices engages in supply chain development activities. The activities include information collection and provision related to supply chain, support to solve technical difficulties by experts, matching of stakeholders, etc.

7) To support export marketing of exporters

- MOC dispatch technical experts to exporters in order to improve their export promotion means, for example, website, company brochure, product catalogue, etc. MOC support exporters when they utilize e-commerce.
- E-commerce is also one of areas of supports to export marketing by Myanmar exporters.



Source: JICA Project Team

Figure 22: Model of Support to Export Marketing of Exporters

8) To start a membership service for exporters and overseas buyers

- MOC will consider a membership services for Myanmar exporters and overseas buyer, free of charge at the beginning.
- The purposes of a membership service are i) to effectively provide MOC's market information and export promotion services, ii) to collect the information of Myanmar exporters and overseas buyers, and iii) to facilitate business matching between Myanmar exporters and overseas buyers.
- The website of MOC is the key tool for the membership service.

9) To periodically held a forum for Myanmar exporters

- MOC organizes forums inviting associations, exporters and stakeholders in Yangon, NPT, and regions. The purposes of forum are to publicize the recent trade policies and MOC's trade promotion services, to listen the problems needs of the private sector, to share the success cases of export, to identify prospective exporters, etc.

10) To increase practical curriculums at TTI

- Trade training of the Trade Training Institute (TTI) is a good tool for exporter development. It is desirable to make the curriculums of TTI more practical in developing exporters. MOC in collaboration with TTI hear the needs for training from potential exporters and feed back to training planning of TTI. Opinions of lecturers of good experience of business should be responded to training planning because potential exporters sometime do not recognize what are really needed.

11) To design more variety of trade training courses including short-term courses

- The current major courses of TTI are four-months Basic Course and week-end courses. It is important to design more variety of training courses of TTI according to the needs of potential exporters.

12) To expand training courses in regions




- There are huge needs for training courses related to trade promotion and trade business. The regional offices of MOC sometimes hold seminars and workshops targeting farmers and SMEs. It is necessary to expand training courses including mobile training in regions. TTI should support seminars and workshops by course development, dispatch of lecturers, etc.

Implementation Schedule

The implementation schedule of actions for exporter development is as shown in the following table.

Table 19: Implementation Schedule: Exporter Development

Exporter Development		Phase 1	Phase 2	Phase 3
Action				
1	To develop product experts at MOC who are in charge of hands-on guidance to potential exporters			
2*	To periodically identify potential exporters as the target of exporter development and to provide integrated support to them in order to realize their exports			
3*	To strengthen the collaboration with associations for exporter development			
4*	To provide technical assistance to (potential) exporters in terms of product quality and product design			
5	To design and initiate programs for national branding such as the Myanmar Excellent Product Award and Myanmar Brand Mark			
6*	To support the supply chain development of major export products			
7*	To support export marketing of exporters			
8	To start a membership service for exporters and overseas buyers			
9	To periodically held a forum for Myanmar exporters			
10*	To increase practical curriculums at TTI			
11*	To design more variety of trade training courses including short-term courses			
12*	To expand training courses in regions			

Note:  Core activity period  Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.9 Publication

Actions for Publication

1) To regularly update exporter/importer directories (“Explore Myanmar”)

- It is necessary to regularly update export/importer directories in order to provide latest information.

2) To increase and enrich articles of Commerce Journal on overseas market information

- It is desirable to increase articles about overseas market information for Myanmar exporters.

3) To add English articles on Commerce Journal or the websites and issue the English version of Commercial Journal

- It is necessary to increase articles in English for overseas buyers such as supply and price trends, domestic suppliers, economy, etc.
- It is desirable to publish English-version of Commerce Journal in the future by starting with a brief monthly periodical.

4) To periodically revise and improve the brochures of DTPCA, MTC, and regional trade centers

- It is necessary to periodically review and update the brochures adding the latest information. Some contents in the brochures of MTC currently need updating.
- When designing the brochures, it is also necessary to pay attention to good combination and layout of Burmese and English contents.

5) To newly prepare brochures introducing Myanmar products

- It is useful to make new brochures of Myanmar products targeting foreign buyers.

6) To publish market research reports conducted by MOC in the future

- MOC can publish market research reports when its market research capabilities are strengthened.

7) To upload the contents of publications to the websites

- It is necessary to upload PDF files of publications to the websites.

8) To distribute the publications more broadly including embassies

- It is necessary to widely distribute publications targeting foreign buyers.


Publication

The implementation schedule of actions for publication is as shown in the following table.

Table 20: Implementation Schedule: Publication

Publication		Phase 1	Phase 2	Phase 3
Action				
1	To regularly update exporter/importer directories ("Explore Myanmar")			
2	To increase and enrich articles of Commerce Journal on overseas market information			
3*	To add English articles on Commerce Journal or the websites and issue the English version of Commercial Journal			
4	To periodically revise and improve the brochures of DTPCA, MTC, and regional trade centers			
5*	To newly prepare brochures introducing Myanmar products			
6	To publish market research reports conducted by MOC in the future			
7*	To upload the contents of publications to the websites			
8	To distribute the publications more broadly including embassies			

Note:  Core activity period  Follow-up or periodical review

 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.10 Services of Regional offices

Actions for Services of Regional Office

1) To examine the functions of regional offices and develop work flows of service for effective and efficient trade promotion services

- It is necessary to standardize the function and work flows of the regional offices. The workflows and SOPs of the regional offices should be improved to be more effective and efficient.

2) To enhance the collaboration network among DTPCA, MTC and the regional offices

- It is necessary to enhance the collaboration network among DTPCA, MTC and the regional office, for example, through the joint implementation of programs.

3) To enhance trade information service of the regional offices by improving the information sharing mechanism using the internet

- It is important to link the information database to be developed by DTPCA to the regional offices in order to enhance the provision of useful information by regional offices.

4) To train the personnel of the regional offices

- Knowledge and skills of officers and staff of regional offices are often insufficient to implement even basic trade promotion activities.

Implementation Schedule

The implementation schedule of actions for services of regional office is as shown in the following table.

Table 21: Implementation Schedule: Services of Regional Office

Service of Regional Office		Phase 1	Phase 2	Phase 3
Action				
1	To examine the functions of regional offices and develop work flows of service for effective and efficient trade promotion services			
2*	To enhance the collaboration network among DTPCA, MTC and the regional offices			
3*	To enhance trade information service of the regional offices by improving the information sharing mechanism using the internet			
4*	To train the personnel of the regional offices			

Note: Core activity period Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

5.11 Services of Overseas Office

Actions for Services of Overseas Office

1) To make use of commercial attachés for trade promotion services to Myanmar exporters and overseas buyers

- Overseas offices are indispensable for effective trade promotion services and give MOC a good advantage in terms of access to overseas market and information. It is necessary to closely collaborate with commercial attachés in overseas market information collection, matching between Myanmar exporters and overseas buyers, support to trade missions, etc.

2) To review and redefine the role of commercial attachés for trade promotion in order to widen their activities

- It is necessary to examine the scope of work of commercial attachés in order to widen the trade promotion activities of commercial attachés. It is also important to review the flow of instructions and reporting in order to establish a good mechanism of collaboration between MOC and commercial attachés.

3) To prepare and provide standard guidelines of activities for commercial attachés including market research and other trade promotion services

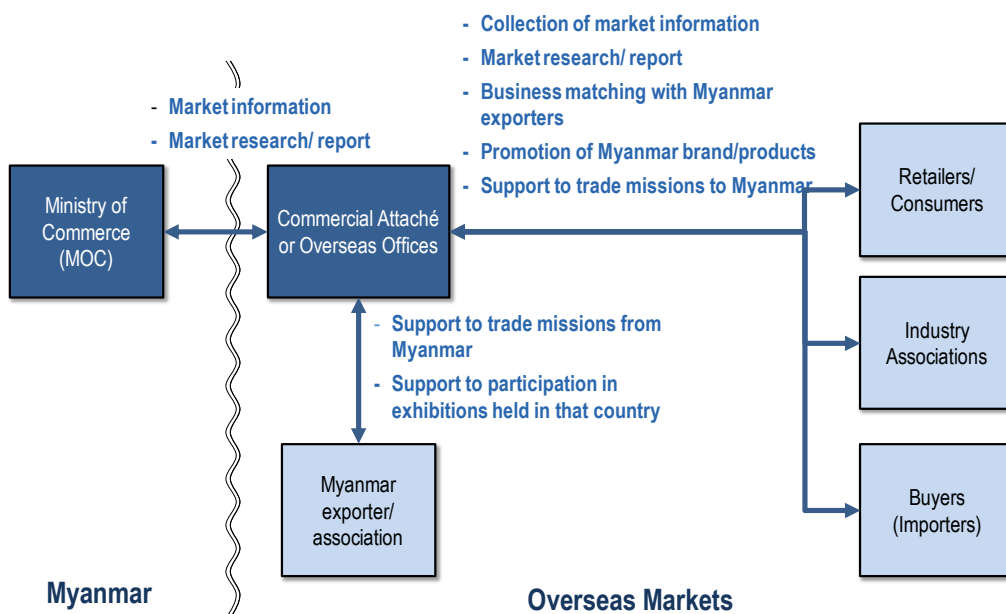
- It is useful to formulate standard guidelines of trade promotion services so that commercial attachés can refer to them any time and so the outputs from commercial attachés are standardized.

4) To give additional training to commercial attachés for trade promotion

- Training of commercial attachés on trade promotion services contribute to good trade promotion services.

5) To dispatch officers of MOC to the embassies in the priority target countries

- The commercial attachés are often busy in assignments other than trade promotion. It should be considered to dispatch MOC’s officers to the priority countries to exclusively engage in trade promotion services.



Source: JICA Project Team

Figure 23: Functions and Tasks Which Overseas Offices Can Conduct

Implementation Schedule

The implementation schedule of actions for services of overseas office is as shown in the following table.

Table 22: Implementation Schedule: Services of Overseas Offices

Service of Overseas Office		Phase 1	Phase 2	Phase 3
1*	To make use of commercial attachés for trade promotion services to Myanmar exporters and overseas buyers			
2	To review and redefine the role of commercial attachés for trade promotion in order to widen their activities			
3	To prepare and provide standard guidelines of activities for commercial attachés including market research and other trade promotion services			
4	To give additional training to commercial attachés for trade promotion			
5*	To dispatch officers of MOC to the embassies in the priority target countries			

Note: Core activity period Follow-up or periodical review
 Priority actions

* denotes activities which have been initiated or on-going.

Source: JICA Project Team

附属資料 2 : 商業省マンダレー事務所及びエーヤワディ事務所の概況

Case Study of Mandalay Regional Office of MOC

Organization

- At the Mandalay Regional Office, the Trade Promotion Department was reorganized to be the Department of Trade Promotion and Consumer Affairs (DTPCA) at the same time with the organizational change at the main office in NPT.
- The DTPCA consists of 9 sub-divisions.
- The establishment of the Yadanabon Trade Promotion Center under the DTPCA of the regional office was officially announced on December 31, 2014. The display and library is set up at the Yadanabon Trade Center.
- There were three District Trade Promotion Offices in Kyauk Se, Myin Chan and Meikhtela.
- The existing number of personnel is 102 persons (8 officers and 94 staff).
- The number of personnel at the Yadanabon Trade Promotion Center is 6 persons (one officer and 5 staff). They engage in consultation service and other regional activities related to trade promotion.
- The Regional Office engages in the rural development and SME development according to the Item 4 of the President Strategy. The purpose of rural development is the poverty reduction.
- The major products of Mandalay are rice, beans, silk weaving, cotton weaving, handicrafts, etc. There are about 100 traders which have obtained the export license. The major export items are pulse & beans and rice.

Major Services

- Information Service
 - * The Domestic Trade Promotion Division monitors the price and demand trends of 20 commodities. The purpose of monitoring it to avoid speculative transactions.
 - * The regional-level Committee monthly monitors the transactions of 8 commodity exchange centers in Mandalay.
 - * The district offices monitor and report trade and economic information such as production, food supply, price and quality of commodities.
 - * The township office and district offices collect data such as imported materials (fertilizer and seeds), water requirement, warehouse cost, transportation cost, labor, etc.
 - * The Regional Office provides market information & news to farmers. The regional call center is planned to provide automatic answering services.
- Publication
 - * The regional office publishes bi-weekly newsletter. The Trade Fair and Trade Center Division and the Policy and Planning Division engage in this newsletter. The newsletter is free. Totally 1,000 copies are printed and distributed through the district offices. About 500 copies are

distributed to farmers and the rest to wholesalers and associations. The newsletter's articles are on market information, technical information, regulations and procedures, etc.

- * The Regional Office provide information on the website (<http://mdytpd.blogspot.com/>) and the Mandalay Office Facebook).

- Trade Fair

- * The Regional Office provides the information about trade fairs.
- * The Policy and Planning Division holds a trade fair for regional products every February. The regional agricultural products and handicraft products are exhibited at more than 100 booths. The Regional Office collaborated with the Ministry of Tourism this year.

- Consultation

- * Township officers visit villages to give advice to producers.
- * The Policy and Planning Division organizes workshops, e.g., the workshop for onion producers & exporters "Comprehensive Development in Plantation and Exporting."

- Training

- * The mobile training is conducted twice a month to support producers in the region. The training was started for bamboo products. One technician was dispatched to producers and transferred the technique of bamboo products. The training was provided for other products such as wine, fruit juice, jam, cotton lungi, jewelry, etc. The Research & Development Division leads this training program.
- * The Regional Office holds the seminar of "Business Development Management Course" (4-day course) in collaboration with the Future Myanmar Academy. The fee for this training is 20,000 kyat.

Source: Field Study (The JICA Project Team visited the Mandalay Regional Office of MOC on May 15, 2015.)



Photo: Inside the Yadanabon Trade Promotion Center



Photo: Inside the Yadanabon Trade Promotion Center



Photo: Display Room



Photo: Corridor of the Entrances

Case Study of Ayeyarwady Regional Office

Organization

- The Ayeyarwady region covers for 6 districts, 26 townships, 7 sub townships, 218 wards, 29 towns, 1,964 village tracts, and 11,651 villages.
- The Ayeyarwady Regional Office has 4 district offices in Hinthata, Myaung Mya, Ma-U-Bin and Phyar Pone.
- The organization structure was modified in May 2015 according to the reshuffle of ministry to consist of 9 divisions as same as the DTPCA in Nay Pyi Taw.
- The existing number of officers and staff in Ayeyarwaddy Regional Office is 178 persons (16 officers and 162 staff). The number of personnel is insufficient and the current personnel must carry out tasks of two to three divisions. The regional office has a personnel plan of total 288 persons (20 officers and 268 staff). The recruitment of personnel is approved and the recruitment process is undergoing.
- The Ayer Trade Center was established in 2015. The permanent display was set up at the Ayer Trade Center.
- The Ayeyarwady region is the biggest area for rice cultivation because it is situated in the delta region of the Ayeyarwady River.
- The Ayeyarwady Regional Office provides trade promotion services to at least 1,000 farmers for mostly domestic trade promotion.
- There are about 100 of exporters and their main products are rice, pulses & beans, oilseeds, fisheries, livestock, and garments, etc.

Major Services

- Technical training
 - * The regional office provides rice millers with technical training regarding energy resources and the natural generator establishment which included husks boiler, boiler, and gasified energy supply mill and etc.
- Consultation services
 - * The regional office provides consultation on the trade-related issues and trade promotion for stakeholders of rice, pulses and beans and oilseed, cane, salt, shrimp, cassava, livestock, fisheries, hotel & tourism, etc.
- Technical assistance
 - * The regional office provides various technical assistances to farmers by collaborating with local and international NGOs and concerned government counterparts. The examples include logistics and supply chain management system, value-added technology for agriculture processing for main crops, facilitating of power supply sources, negotiation with contract farming businesses from such as countries as Thailand and Vietnam. The supports to energy

supply for factories and mill, setting-up of new rice mills, and waste water management are also provided.

- * The regional office participates, organizes and supports regional and international trade fairs.
- * The regional office collaborates promotes the development of local producers and exporters according to the Policy of Rural Development and SME promotion.

Constraints

- The number of staff is limited to manage all divisions and district offices.
- The facilities of office and communication are weak to provide services to stakeholders.
- The important areas of capacity development are
 - * English language
 - * Internet usage to search information
 - * Capability of supporting local traders in terms of modern business practice

Source: Field Study (The JICA Project Team visited the Ayeyarwady Regional Office of MOC on June 1, 2015.)



Photo: View of the Ayeyarwady Regional Office



Photo: Inside the Ayer Trade Center

附属資料 3 : 研修ニーズ分析質問票

Questionnaire for Training Needs Assessment
သင်တန်းဆိုင်ရာလိုအပ်ချက်ထောက်ကူပြု (မိမိကိုယ်တိုင်ဆန်းစစ်)မေးခွန်းလွှာ

Name အမည်	
Title ရာထူး	
Department/ Division ဌာန	
Current Office Location: လက်ရှိတာဝန်ထမ်းဆောင်နေသောအရပ်ဒေသ	

Guidance to fill the column below (The number is corresponding to *numbers below)

ဖော်ပြချက်အတွက် လမ်းညွှန်ချက်

(လမ်းညွှန်ချက်မှ နံပါတ်စဉ်ကို ဖော်ပြချက်များတွင် ပြန်ညွှန်းထားပါသည်။)

- 1) Please describe your concrete tasks which comprise your job . If you have multi tasks, please fill each task in different row. (If you have more than four tasks, you can add the column below)
- ၁) လက်ရှိထမ်းဆောင်နေသော လုပ်ငန်းတာဝန်များမှ သိသာထင်ရှားသော အလုပ်များကိုရေးပါ။ အလုပ်တာဝန် အများအပြားရှိသူများအတွက်မူ အလုပ် တစ်ခုချင်းစီကို ဖော်ပြချက် တစ်ခု တစ်လိုင်းနှုန်းဖြင့်ရေးပေးပါ။ လက်ရှိဖော်ပြချက် (၄) ခု ထက် ကျော်သွား ပါက (ကိုယ့်ဘာသာ) လိုသလို လိုင်းဖြည့် ဆက်ရေးနိုင်ပါသည်။

- 2) Please describe the necessary knowledge (up to 3 important knowledge items) to perform your job. (ex. Marketing, specific commodities, int'l trade, English, IT, etc.)
- ၂) ကိုယ်တာဝန်ယူထားသော အလုပ်နေရာတွင် တာဝန်ထမ်းဆောင်ရန် လိုအပ်သော တတ်သိ ပညာknowledge အမျိုး အစားများကို ရေးသား ဖော်ပြ ပေးပါ။ (အရေးကြီးသော knowledge - ၃ခု -အထိ ရေးနိုင်ပါသည်။)
ဥပမာ။ ။ ဈေးကွက်အကြောင်း၊ ကုန်စည်(အမျိုး)အကြောင်း (တိကျ/သေချာသိခြင်း)၊ နိုင်ငံတကာ ကုန်သွယ်မှု၊ အင်္ဂလိပ်စာ (ကျွမ်းကျင်ခြင်း)၊ IT နည်းပညာ (နားလည်ခြင်း) အစရှိသည် ။

- 3) Please compare the required levels with your current knowledge & skills and assess the gap in 3- point scale(1:small; 2:medium; 3: big)
- ၃) ၎င်းရှိသင့်သော knowledge နှင့် သင်၏လက်ရှိ knowledge ၊ ထိုအတူ ရှိသင့်သော skills နှင့် သင်၏လက်ရှိ skills တို့၏ ကွာဟချက် ကို (မိမိ ဘာသာ) အဆင့် (၁) ဆင့် အနေ အထားဖြင့် နှိုင်းယှဉ်အကဲဖြတ်ပါ။
စကားအယူအဆမှာ ။ ။
အဆင့် ၁ = ကွာဟချက် နည်း ပါသည် ။
အဆင့် ၂ = ကွာဟချက် အလယ်အလတ် ။
အဆင့် ၃ = ကွာဟချက် များလွန်းသည် ။ (လိုအပ်ချက်များစွာရှိနေပါသေးသည်)

- 4) Please describe both technical and managerial skills (up to 4 important skill items) to perform your job. (ex. Data analysis, report writing, Business English communication, strategy making, etc.)
- ၄) လက်ရှိ အလုပ်လုပ်ရန် နည်းပညာပိုင်းဆိုင်ရာ၊ စီမံခန့်ခွဲမှုဆိုင်ရာ မည်သည့် skills များအရေးကြီးပါသနည်း ။ (အရေးကြီး skill အရေအတွက် ၄ ခု အထိ ရေးပေးပါ။)
ဥပမာ ။ ။
Data ကို သုံးသပ်နိုင်မှု ။
အစီအရင်ခံစာရေးနည်း ။
လုပ်ငန်းခွင်သုံး English စကား (စီးပွားရေး/ကုန်သွယ်ရေးအစရှိသည်တို့ နှင့်စပ်လျဉ်း၍)
ဗျူဟာ (ရေတို ရေရှည်စီမံချက်များ)ချမှတ်ဆောင်ရွက်နိုင်ခြင်း အစရှိသည် ။

The Project for the Capacity Development of Trade Promotion in Myanmar
Phase II

Job Description (tasks) *(၁) လုပ်ငန်းတာဝန်များ	Required Knowledge *(၂) လိုအပ်သော တတ်သိပညာ	Gap *(၃) ကွာဟအဆင့်	Required Technical & Managerial Skills *(၄) လိုအပ်သောနည်းပညာဆိုင်ရာ၊ စီမံခန့်ခွဲမှု ဆိုင်ရာကျွမ်းကျင်မှု အရည်အသွေးများ	Gap *(၃) ကွာဟအဆင့်

附属資料 4 : 研修ニーズ・マトリックス

REQUIRED SKILLS (5 MTCs and Other Units, Department of Trade Promotion & Consumer Affairs)

Item	Job Position	English Language 4 Skills			Report Writing		Computer Skills		Advanced Computer Skills		Information Via Internet (How to)		Interpersonal Skills			Proposal Writing (Project)			Negotiation Skills		Learning Other Language	
		L	M	H	M	H	M	H	M	H	M	H	L	M	H	L	M	H	M	H	M	H
I.	Yangon MTC																					
	Deputy Director		1											1	1							
	Officers		1	1				1						1								
	Staff			6	2	3		1	2	1	1	1		3	2					1		3
II.	Mandalay MTC																					
	Director		1																			
	Deputy Dir.		1																			
	Assistant Director		1																			
	Officers		1	2	1	1	1	2														
	Staff		6	20	18	6	10	6														
III.	Patheingyi MTC																					
	Officer		1																			
	Staff			7				7														
IV.	Monywa MTC																					
	Staff		9	3	7	1	2	5		3	2	3		1	2			2				
V.	Myittha MTC																					
	Staff			2		2		1														
VI.	Trade Fairs: TF & MTCs																					
	Deputy Director		1																			
	Assistant Director	1	2					1														
	Officer			2				2														
	Staff																					
VII.	Market Analysis _ITP																					
	Deputy Director																					
	Assistant Director																					
	Officer																					
	Staff																					
VIII.	Domestic Trade Promotion																					
	Deputy Director																					
	Assistant Director																					
	Officer																					
	Staff																					
IX.	TPCA																					
	Deputy Director					1							1			1						
	Assistant Director			2																		
	Officer		2	5	1		2	1												1		
	Staff																					
	Total	1	27	50	30	13	16	26	2	4	3	4	1	6	5	1	0	2	1	1	0	3

附属資料 5 : 研修試行報告書

Report of Trial Training Implementation

JICA Project Team

1. Training Program on International Trade Promotion

The trial training course for trade promotion was designed and implemented separately for officers and staff.

1.1 Training Program for Officer

(1) Outline of Training Program

Objective: The training course aims to acquire the basic knowledge of international trade promotion activities as well as Myanmar's trade promotion policy through the series of lectures and case studies. In particular the emphasis is on the learning of basic roles/functions and services of TPO from the experiences of ASEAN countries and Japan.

Date: August 25 to 27, 2015

Venue: MOC, Nay Phi Taw

Training Topics: Trade Promotion Policy in Myanmar/ Role and Function of TPO/ Case Study of Japan's TPO/ Market Information Service/ Export Product Development/ Website Service/ Consultation Service/ Trade Fair/ Lessons from ASEAN Study Tour/ Activities of Myanmar Trade Center/ Group Exercise: How to Implement Trade Promotion

No. of Participants: 60 persons

The majority of participants are from DTPCA (32 people), followed by DOT (10 people), Minister Office (4 people) and state/division office (4 people). In addition, 10 newly-recruited officers who were not assigned to particular departments also participated. By position, one is the director general, 9 are deputy directors and 7 are assistant directors.

(2) Lectures

JICA experts and MOC officers provided lecturers.

(3) Time Table

Time	Subject	Contents	Instructor
Day 1_25 th August 2015			

Time	Subject	Contents	Instructor
09:30 – 10:45	Session 1: Trade promotion policy and measures of Myanmar	<ul style="list-style-type: none"> - Current Situation of National Export Strategy (NES) - Trade Promotion Policy of MOC - Challenges Ahead - Q&A 	MOC U Aung Soe, Deputy Director General, DTPCA
10:45 – 11:00	Coffee Break		
11:00 – 12:00	Session 2 (1): Role and function of Trade Promotion Organization (TPO)	<ul style="list-style-type: none"> - Function of International Trade Promotion - Role of Trade Promotion Organization - Lessons from Experiences of Other TPOs 	JICA Project Team: Mr. Mishima
12:00 – 13:00	Lunch		
13:00 – 14:40	Session 2 (2): Case Study of TPO: JETRO	<ul style="list-style-type: none"> - Historical change of JETRO's role - JETRO's trade promotion services - Q&A 	JICA Project Team: Mr Asakura
14:40 – 15:00	Coffee Break		
15:00 – 16:00	Session 3: Market Information Service	<ul style="list-style-type: none"> - Types of market information - Market information collection and dissemination - How to conduct market research - Q&A 	JICA Project Team: Mr. Mishima
Day 2 26th August 2015			
9:30 – 10:30	Session 4: Exporter /Product Development	<ul style="list-style-type: none"> - Basic product development and branding concept - Cases of product development: One-Village-One-Product - Q&A 	JICA Project Team: Mr. Kameyama
10:30 – 10:45	Coffee Break		
10:45 – 12:00	Session 5: Website Service	<ul style="list-style-type: none"> - Design and contents of website and other interfaces - Market data dissemination through website - Case studies of websites of TPOs - Q&A 	JICA Project Team: Mr. Sai/ MOC
12:00 – 13:00	Lunch		
13:00 – 14:30	Session 6: Consultation with Traders	<ul style="list-style-type: none"> - Frequent Asked Questions (FAQs) - Marketing plan - Business matching of buyers and sellers - Q&A 	JICA Project Team: Mr. Matsui
14:30 – 14:45	Coffee Break		
14:45 – 16:00	Session 7: Trade Fair	<ul style="list-style-type: none"> - Preparation - Selection of the correct fair - Setting target - Promoting participation - Evaluation - Q&A 	JICA Project Team: Mr. Mishima/ MOC

Time	Subject	Contents	Instructor
Day 3_27th August 2015			
09:30 – 10:30	Session 8: Lessons from ASEAN Study Tour	- Trade Promotion Services of Malaysia - Trade Promotion Services of Indonesia - Lessons Learnt - Q&A	Members of ASEAN Study Tour
10:30 – 10:45	Coffee Break		
10:45 – 12:00	Session 9: Activities of Trade Promotion Centers (Activities of MTC)	- Basic Policies - How to Provide Services (Inquiry, Consultation, Display, Library, etc.) - Q&A	MOC
12:00 – 13:00	Lunch		
13:00 – 14:30	Session 10 (1): [Group Discussion] How to implement trade promotion at the workplace	Discussion by each department and regional office	Facilitator: JICA Project Team: Mr. Kameyama
14:30 – 14:45	Coffee Break		
14:45 – 16:00	Session 10 (2): [Presentation] How to implement trade promotion in the workplace	Presentation by groups	Facilitator: JICA Project Team: Mr. Kameyama
16:00 – 16:10	Closing	Certificate Awarding	MOC

(4) Major Event during the Training

Q&A Session

During the Q&A session, the following questions were raised by the participants. Lectures answered these questions.

- * What criteria JAPAN market set for products? (Specification & Quality)
- * What is the trade promotion budget in Japanese government?
- * How to get accurate data collection for commodity price?
- * What process should be taken to formulate national branding strategy?
- * How to promote website service given the fact that only 10% of Myanmar's population uses internet at present?
- * How long it will take to open all targeted MTCs?
- * How many MTCs in 2015, then in 2016?
- * When local trader wants to export his/her products, how the products can be assured for quality and standard (to export targeted foreign countries)?

Group Exercise

The participants were divided into five groups. Each groups discussed the topic: How to implement trade promotion in Myanmar? After the discussion, each group presented the result of their discussions.

A sample of presentation is as follows:

Table 1 Sample of Presentation

Issues of Trade Promotion	
<ul style="list-style-type: none"> • Need to educate the farmers, local businessmen & SMEs (owners) (introducing them the up-to-date market information, possible chances and new challenges) • Investment plan/ supportive investment • Limited information about the other markets: quality/ standardization and technology. • Limited reliable human resources 	
Possible Solutions for the Issues	
<ul style="list-style-type: none"> • Government/ International organization support: financial aid (in developing SMEs) • Arrangement on financial aid • Upgrading/ Enforcing the product development (find ways and means of value-added products) • Gradually promote exported items to be finished goods with trusted quality • Ways to collect all information and share them back to private sector: general knowledge, skills, market information, data etc. • Invent/ made export product, MM via the domestic materials • Market selection to be made before making export • To product as per targeted market' preferences, not to product as per MM' liking • Arranging trainings:- <ul style="list-style-type: none"> - Training for private sector - Training for MOC personnel (like JICA training) - Training for brokers/ middle men (from manufactures' to targeted markets, support in related product' trading. 	
Implementation Plan	
Short Term	Long Term
<ul style="list-style-type: none"> • Training • Aid plan • Market information • Studies about markets 	<ul style="list-style-type: none"> • New product: MM new exported product to be made • Assure quality through upgrading technology and assuring constant raw materials

Source: JICA Project Team

(5) Evaluation and Feedback from the Participants

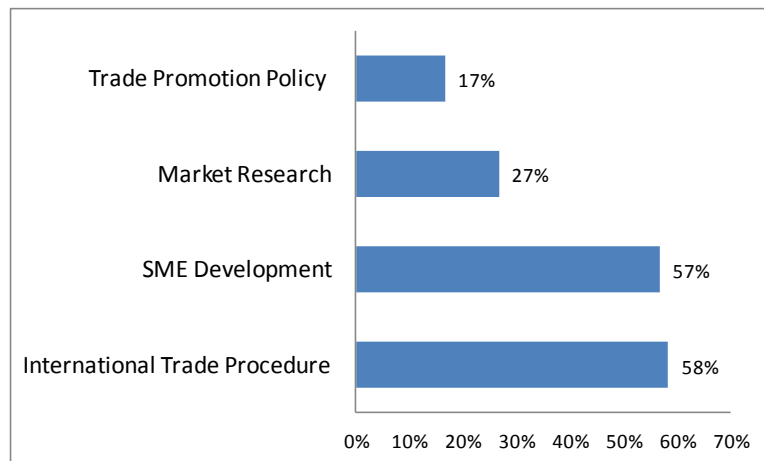
a. Overall evaluation

For overall evaluation, 100% of participants agreed that the training course is useful, among them 63% strongly agreed. For specific subject evaluation, “Lessons from ASEAN Study Tour (80%)”, “Role and Function of TPO (78%)”, and “Export Product Development (75%)” are highly appreciated by participants as very useful and relevant subjects.

In particular, “Lessons from ASEAN Study Tour” lectured by Mr. Myo Thu, former director of Mandalay Regional Office, received highest percentage of usefulness due to sharing good practices of TPO in Malaysia and Indonesia in very enthusiastic and frank manner.

b. Suggestions for future training program

For future training, the 58% and 57% of the participants have indicated that they want to learn “International Trade Procedure” and “SME Development” respectively, followed by “Market Research” (27%) and “Trade Promotion Policy” (17%). In addition to that, the participants have also shown interests on the topics such as “Web Site Development”, “Logistics/Supply Chain”, “Project Management”, “Business Matching” and “MOC’s Laws and Regulations”.



Source: JICA Project Team

Figure 8-1 Future Training Needs by Officers Participants in NPT



1.2 Training Program for Staff

(6) Outline of Training Program

Objective: The training course aims to make familiar with Myanmar’s current trade promotion policies and activities. It is designed as a general introductory course for further learning of more specific topics of trade promotion activities.

Date: August 24, 2015

Venue: MOC, Nay Phi Taw

Training Topics: Trade Promotion Policy in Myanmar/ Role and Function of TPO/ Market Analysis/ Activities of Myanmar Trade Center

No. of Participants: 50 persons

By position, 18 persons are superintendents, 16 are deputy superintendents, 5 are senior clerks, 9 junior are clerks and 2 are daily workers. The majority of participants are from DTPCA (28 people), followed by DOT (10 people), state/division office (7 people) and Minister Office (5 people).

(7) Lectures

JICA expert and MOC officers provided lecturers.

(8) Time Table

Time	Subject	Contents	Instructor
09:30 – 09:45	Opening		MOC
09:45 – 10:00	Coffee Break		
10:00 – 11:00	Session 1: Trade promotion policy and measures of Myanmar	<ul style="list-style-type: none"> - Current Situation of National Export Strategy (NES) - Trade Promotion Policy of MOC - Challenges Ahead - Q&A 	MOC U Aung Soe, Deputy Director General, DTPCA
11:00 – 11:05	(5 Minutes Break)		
11:05 – 12:10	Session 2 (1): What Are Trade Promotion Services	<ul style="list-style-type: none"> - Role of Trade Promotion and Trade Promotion Organization (TPO) - Types of trade promotion services 	JICA Project Team: Mr. Mishima
12:10 – 13:10	Lunch		
13:10 – 14:10	Session 2 (2): How to study market Market Information Market Analysis	<ul style="list-style-type: none"> - Market Nature - Market information collection & dissemination - How to analysis & report - Q&A 	MOC Dr. Htein Lynn
14:10 – 15:10	Session 3: Activities of Trade Promotion Centres (Activities of MTC)	<ul style="list-style-type: none"> - Basic Policies MTC - How to Provide Services (Inquiry, Consultation, Display, Library, etc.) - Q&A 	MOC Ms Mya Mya Sein
15:10 – 15:25	Coffee Break		
15:25 – 16:00	Session 5: Discussion	<ul style="list-style-type: none"> - Needs/problems of the private sector for trade promotion - Problems in providing services - How to enhance the services 	JICA Project Team: Mr. Kameyama /MOC
16:00 – 16:10	Closing	<ul style="list-style-type: none"> - Certificate awarding 	MOC/ JICA Team

(9) Major Events during the Training

Questions by Participants

During the Q&A session, the following questions were raised by the participants. Lectures answered these questions.

- * How Yangon should MTC's enquiry/consultation service be improved?
- * How the very developed country like Japan, will effectively support in Myanmar's economic development in particular trade promotion?
- * Role of importer: What importers need to do in Import Promotion?
- * Role of Exporter: What importers need to do in Export Promotion?

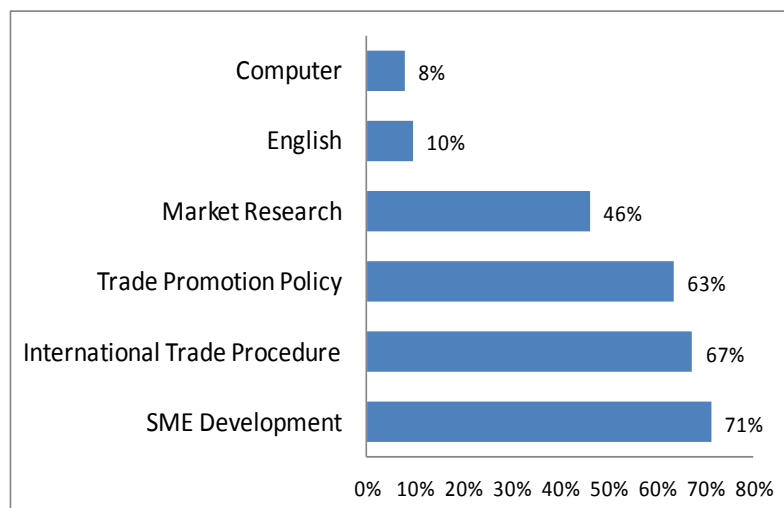
(10) Evaluation and Feedback from Participants

a. Overall evaluation

For overall evaluation, 88% of participants agreed that the training course is useful, among them 48% strongly agreed. For evaluation of specific subjects, "Trade Promotion Policy in Myanmar" and "Role of Function of TPO" are highly appreciated as most useful and relevant subjects, which are followed by "Market Research" and "Activities of MTC".

b. Suggestions for future training

For future training, the 71% of the participants have indicated that they want to learn "SME Development", followed by "International Trade Procedure" (67%) and "Trade Promotion Policy" (63%) and "Market Research" (46%). In addition to that, the participants have also shown interests on the topics as "English" and "Computer". Compared with officers' evaluation, staff shows higher interests on Trade Promotion and Market Research.



Source: JICA Project Team

Figure 8-2 Future Training Needs by Staff Participants in Nay Pyi Taw



1.3 Workshop on Trade Promotion (MATREDE Case Study)

(1) Outline of Training Program

Objective: The training course aims to learn how to develop export promotion learning from the case of MATRADE and through discussions.

Date: December 9 and 10, 2015

Venue: MOC, Nay Phi Taw

Training Topics: History of Malaysia's Export Development and MATRADE/ Management of MATRADE/ Programs for exporters development of MATRADE/ Industry Excellence Award/ Lessons from MATRADE and other TPOs/ Roadmap of Trade Promotion for MOC (and) Group Exercise: "How to develop Export Promotion Services"

No. of Participants: 45 persons

The majority of participants are from DTPCA (38 people), followed by DOT (1 person), Minister Office (1 person) and state/division office (7 people).

(2) Lectures

Representatives from MATRADE and JICA Expert provided the lectures to the participants.

(3) Time Table

Time	Subject	Contents	Instructor
December 9 (Wednesday)			
09:00 –09:15	Opening Remarks		Ms. Naw Mutakapaw, Dir. MOC
09:15 – 10:15	Session 1: History of Malaysia's Export Development and MATRADE	<ul style="list-style-type: none"> - History of export development of Malaysia - Malaysia's export promotion policies - History of MATRADE's growth 	Mrs. Razida Hanim Razak, AD, MATRADE
10:15 – 10: 30	Coffee Break		
10:30 – 12: 00	Session 2: Management of MATRADE	<ul style="list-style-type: none"> - Organization structure of MATRADE and how to design the organization - Human resource management and human resource development of 	Mrs Roslina Long Senior Manager, MATRADE

Time	Subject	Contents	Instructor
		MATRDE	
12:00 – 13: 00	Lunch		
13:00 – 15:00	Session 3: Programs for exporter development of MATRADE	- Exporter development programs of MATRADE: Program design and experience	Mrs Roslina Long Senior Manager & Mrs. Razida Hanim Razak, AD, MATRADE
15:00 – 15: 15	Coffee Break		
15:15 – 16: 00	Session 4: Industry Excellence Award	- Industry Excellence Award - Q&A	Mrs. Razida Hanim Razak, AD, MATRADE
16:00 –16:15	Closing		Ms. Naw Mutakapaw, Dir. MOC
December 10 (Thursday)			
09:00 – 10:15	Session 5: Lessons from MATRADE and Other TPOs	- Lessons from MATRADE - How to utilize the lessons for the development of MOC - Q&A	Mr Kazuo Mishima Team Leader, JICA Project Team
10:15 – 10: 30	Coffee Break		
10:30 – 12: 00	Session 6: Roadmap of Trade Promotion for MOC	- Presentation of the Roadmap - Q & A	Mr Kazuo Mishima Team Leader, JICA Project Team
12:00 – 13: 00	Lunch		
13:00 – 15:00	Session 7: Group Discussion	- How to develop export promotion services (4 groups)	Facilitated by Mr Kazuo Mishima and Team members, JICA Project Team
15:00 – 15: 15	Coffee Break		
15:15 – 16: 00	Session 7 (Continued): Presentation	- Presentation by four groups, lead by Directors and Deputy Directors of DTPCA	MOC participants
16:00 –16:15	Comments from the DTPCA and the JICA Team.		Ms. Naw Mutakapaw, Dir. MOC & Mr Kazuo Mishima, Team Leader, JICA Project Team
16:15 - 16:30	Closing		

(4) Major Event during the Training

Q&A Session

During the Q&A session, the following questions were raised by the participants. Lectures answered these questions.

- ❖ In managing Trade with China, what is your advice for Myanmar? Advice us, based on your experiences at MATRADE.
- ❖ Who are the major competitors of MATRADE in international markets?
- ❖ How do you assure the quality of the exporters (how MATRADE controls in quality).
- ❖ Elaborate more on MATRADE' Export Development Program. What is the starting point? What are the outreach levels?

- ❖ What trainings MATRADE arranges for Trade Promotion personnel. What are the competencies and qualities, MATARDE personnel should have?
- ❖ (As per your chart), the number of staff is about 500 and 30% are stationed in oversea. But, there are only 30 to 20 staff in your organization structure. So, you mean - one unit has average 4 or 5 staff only or what is the discrepancy?
- ❖ How does MATRADE organize the Trade Fairs? Combined or separated for each unit?
- ❖ How much is the budget proportion for Trade Promotion from Ministry's budget?
- ❖ Advise MOC. What kind of trainings we could arrange relating the Exporter Development Program?
- ❖ For capacity building, do you think the University of Ministry should be arranged and what impact we could expect?
- ❖ What challenges MATRADE face in skill development, capacity building and improving competencies?
- ❖ How long MATRADE' employee station overseas. (by years)
- ❖ How many employees, recruited for the Exporter Development Program?
- ❖ What are the implications of SME Development Program for Myanmar to advice?
- ❖ How does MATRADE select the Companies to be eligible in Exporter Development Programs?
- ❖ Relating "Industry Excellence Award", who are the eligible companies for the competition?
- ❖ Any standards set for the companies if they want to compete for the award; like whether the company has to be the beginner, the middle or the well-developed one (already in the market).
- ❖ How BOD is formed to rate the companies in choosing one to compete for the award? How BOD evaluate the winner for the award? Could you share us your selection criteria (CSR)?
- ❖ MATRADE, do you think whether MOC needs to open regional offices in every state and divisions, for trade promotion? Because, MOC noticed that MATRADE has only 5 Regional Offices?
- ❖ How MATRADE communicate and support between head quarter and regional offices?
- ❖ How MATRADE assess the exporters?

Group Exercise

The participants were divided into four groups. Based on the participants' list, the groups were formed randomly as per preference of Director, MOC.

The topic to discuss among the members is "How to develop Export Promotion Services." After the discussion, each group presented the result of their discussions.

Contents of Discussion

Each group was arranged to design an activity or program for export promotion. After choosing an activity/program, the groups were discussed the details of activity/program, proposed through group presentation.

A sample of presentation is as follows:

Sample of Presentation

Problem:	Insufficient knowledge in export development
How to solve:	a. To get internal/ external knowledge b. To improve HR management c. To get the help from JETRO, JICA, KOTRA, GIZ
<ul style="list-style-type: none">❖ To get knowledge sharing on how KOREA developed with Export Development. How Myanmar can apply the learning in its own context❖ To develop the Capacity Building for Export❖ To provide Training for Trainers❖ To distribute Training Plans and teaching materials❖ To provide the Export Promotion related trainings, workshops and seminars in distinct cities within one year <p><u>Necessary Input</u></p> <ul style="list-style-type: none">❖ Infrastructure/ Budget❖ Recruitment of International Staff <p><u>Related organization to correlate</u></p> <ul style="list-style-type: none">❖ Regional Chambers of Commerce,❖ Local Government and Private Sectors <p><u>Possible Issues</u></p> <ul style="list-style-type: none">❖ Less interest (by Exporters)❖ Not enough Fund,❖ Unpredictable logistics <p><u>Expected Outcome</u></p> <ul style="list-style-type: none">❖ Increase Value of Export Product,❖ Less Trade Deficit,❖ More Trade Surplus,❖ More successful exporters,❖ Increasing capacity of the exporters,❖ Myanmar - "Another Asia Tiger"	

Source: JICA Team

(5) Evaluation and Feedback from the Participants

a. Overall evaluation

This was a useful learning experience for the majority, based on the rate of responses by the MOC participants. All 100% participants answered that the workshop and its sessions are relevant. Among them, over 60% (replies) strongly evaluated the relevancy of the topics during the workshop.

The sessions "Exporters Development" (Program) and "Management of MATRADE" lectured by the representatives from MATRADE, attained the highest interest in first day of the workshop.

So also, "Road Map of Trade Promotion in MOC" lectured by Mr. Kazuo Mishima, Team Leader of the JICA Project Team, was commented as the practical and applicable session; over 60% of participants responded it as applicable learning, supportive to current job.

b. Suggestions for future training program

Over 60% claimed the workshop to arrange another time for related MOC management and MOC employees, as being the significant and understandable. They wanted to know more on "Exporter Development Program", and to discuss more on "Lessons from MATRADE and other TPOs."



2. Training Program on International Trade Procedure

2.1 Course Design and Objective

Unlike the above mentioned training course for trade promotion, this training course was designed for both officers and staff in Yangon, Mandalay and surrounding regions because of the limited number of officers there and the knowledge gap of international trade practice between officers and staff is not very large.

The objective of this course is for officers and staff to acquire the basic knowledge and skills of international trade procedures through the series of lecturers and case studies. It covers important international trade business topics such as INCOTERMS, export and import procedures, quality standard, trade settlement, shipping documents etc. It also aims at the acquisition of basic knowledge of marketing plan and strategy. At the end of the course, participants will discuss the issues and prospective actions for improving consultation with exporters.

In order to invite from state and district office as much as possible, the training was conducted in Yangon and Mandalay in from September and October, 2015.

Furthermore, this training program for international trade practice was conducted by close coordination and collaboration with Trade Training Institute (TTI) in Yangon as TTI had had accumulated knowhow and experiences of designing and implementing international trade theory and practice courses for several years by receiving technical cooperation from JICA.

2.2 Training Program in Yangon

(1) Outline

Date: September 29 to October 1, 2015

Venue: Trade Training Institute, Yangon

Training Topics: Global Trade & Myanmar Trade Policy/ Overview of International Trade Flow/ INCOTERMS & Sales Contract/ Import/ Export License/ Procedures/ Export to Japanese Market/ Trade Settlement (L/C) & Bank Transfer/ Shipping Documents/ Custom Clearance/ Market Selection Analysis/ Export Market Plan/ Group Exercise and Presentation for Export Market Plan

No. of Participants: 52 persons

Among the total participants, 22 are officers and 30 are staff. About 40% of the participants are from DTPCA's state and district office, followed by DOT and DTPCA in Yangon.

(2) Lecturers

Outside lecturers, TTI lecturers, JICA expert and MOC officer provided lecturers.

(3) Time Table

Time	Subject	Contents	Instructor
Day 1: 29 th September 2015 (Tuesday)			
09:30 – 10:00	Opening ceremony 5 th floor, MOC Ministry of Commerce Building, Yangon		
10:00 – 10:30	Photo taking session (Participants, MOC Management & Instructors)		
	Coffee Break		
10:30 – 12:00	Session 1: Global trade and Myanmar's trade policy	- Current situation of global trading - WTO, AEC	Dr Maung Aung, Program Director, Trade Training Institute; Adviser, MOC Ministry of Commerce
12:00 – 12:45	Lunch		
12:45 – 14:15	Session 2: Overview of International Trade	- Overall int' trade business flow - International Trade documentary flow	U Thein Myint Wai, Assistant Director, Trade Training Institute
14:15 – 14:30	Coffee Break		

14:30 – 16:00	Session 3: INCOTERMS & Sales Contract	- Major points of Incoterms - FOB & CIF - Contract negotiation - Standard sales contract	U Thein Lwin General Manager (Retired) Ministry of Commerce
Day 2: 30 th September 2015 Wednesday			
09:30 – 10:30	Session 4: Trade Settlement (L/C and bank transfer)	- Overall process of payment - Opening L/C, TT, DAP, etc. - Review of Importer's Bank - Review of Exporter's Bank	U Thein Lwin General Manager (Retired) Ministry of Commerce
10:30 – 10:45	Coffee Break		
10:45 – 12:30 ¹	Session 5: Export to Japanese Market	- Market Trend - Consumer Trend - Distribution System - Import related regulation	Mr. Kazuo MISHIMA, Team Leader, JICA Project Team
12:30 – 13:15	Lunch		
13:15 – 14:15	Session 6: Import/export license	- Trade policy in Myanmar - Import/ Export License	U Aung Myat Kyaw, Director, DOT, Yangon District, MOC: Ministry of Commerce
14:15 – 14:30	Coffee Break		
14:30 – 16:00	Session 7: Shipping Documents	- Overview of shipping documents - Packing list - B/L - Certificate of origin	U Aung Khin Myint Chairman, MIFFA; Myanmar International Freight Forwarders' Association
Day 3: 1 st October 2015 Thursday			
09:30 – 10:45	Session 8: Custom Clearance	- Documentation of ED/ID declaration - (Manual) E-Customs declaration - Export/Import declaration (dual system)	U Nyi Nyi Aung, Chairman, Myanmar Customs Brokers Association
10:45 – 11:00	Coffee Break		
11:00 – 12:30	Session 9: Market Selection Analysis	- Major factors to select export market - Specific features of major export market - Successful cases for export marketing	Dr. Hla Theingi, Assistant Professor, Assumption University (Thailand)
12:30 – 13:15	Lunch		
13:15 – 14:30	Session 10: Export Market Plan	- Competitive advantage - Marketing mix (Product, Price, Place, Promotion) - Current positioning of Myanmar products in export markets - Successful cases of Myanmar exporters - How to support export market plan	U Myo Min CEO & President, PS Business School
14:30 – 14:45	Coffee Break		
14:45 – 16:00	Session 11: 【Group Exercise】	- “Group Exercise”: Export Market Plan	U Myo Min & U Thein Myint Wai

¹ Extra time is arranged for translation. (about 1 hour session + 1 hr translation, also reserved time for Q&A, if any)

		(How to promote Myanmar's products, followed by presentation)	(jointly facilitate to MOC employees)
16:00 – 16:15	Closing (Completion Certificate Awarding)		4th floor, TTI Classroom, Ministry of Commerce Building, Yangon

(4) Major Events during the Training

Q&A Session

During the Q&A session, the following questions were raised by the participants. Lectures answered these questions.

- * Why FDI has not been realized much in agriculture sector?
- * What is the government role in supporting farmers for "technology transfer" or attracting FDI?
- * In relation to the above question, what kind of task to be done by MOC or Ministry of Industry?

(5) Evaluation and Feedback from Participants

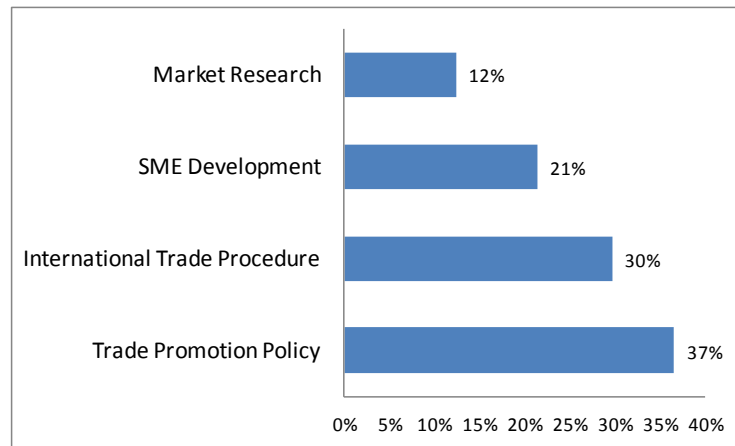
a. Overall Evaluation

In overall, 100% of the participants agreed that the course (10 subjects in this course) as a whole was useful, while 88% strongly agreed. For specific subjects, "Export Market Plan" received the highest percentage of usefulness (86%) due to interactive and practical approach of the lecturer, followed by "INCOTERMS" (69%), "Market Selection Analysis" (65%), "Global Trade and Myanmar's Trade Policy" (53%) and "Group Exercise and Presentation for Export Market Plan" (49%).

b. Suggestion for future training

For future training, the 37% of the participants have indicated that they want to learn "Trade Promotion Policy", followed by "International Trade Procedure" (30%) and "SME Development" (21%) and "Market Research" (12%). In addition to that, the participants have also shown interests on the topics as "Global Supply Chain", "Competition Law", "Consumer Protection Law", and "Promotion Measures of Export of Rice and Beans".

Furthermore, participants requested to have more time for each subject so that they can have sufficient time for Q&A.



Source: JICA Project Team

Figure 8-3 Future Training Needs by Participants in Yangon



(3) Training Program in Mandalay

(1) Outline

Date: October 10 to October 13, 2015

Venue: Regional Office (DTPCA), Mandalay

Training Topics: Global Trade & Myanmar Trade Policy/ Overview of International Trade Flow/ Market Selection Analysis/ INCOTERMS & Sales Contract/ Technical Barriers to Trade/ Custom Clearance/ Consumer Affairs/ Shipping Documents/ Export Market Plan/ Import/Export Procedures/ Trade Fairs & Trade Centers/ Group Exercise and Presentation for Export Market Plan*

* The underlined topics have been newly added from the training program in Yangon based on the request from director of Mandalay Regional Office. Since these 3 additional subjects were added and time was slightly added for Q&A purpose (based on the feedback in Yangon), the training course was designed to be organized for 4 days in Mandalay instead of 3 days in Yangon.

No. of Participants: 53 persons

Three officers and 50 staff have participated the training. About 55% of participants are from DTPCA Mandalay District Office, followed by DTPCA's other District Office and DOT Mandalay District Office.

(2) Lecturers

Outside lecturers, TTI lecturers, and MOC officer provided lecturers.

(3) Time Table

Time	Subject	Instructor
Day 1: 10 th October 2015 (Saturday)		
9:15 – 09:30	Participants registration	
09:30 – 10:00	Introductory	Dr Maung Aung Program Director, Trade Training Institute; Adviser, MOC
10:00 – 10:15	Coffee Break	
10:15 – 12:00	Session 1: Global trade and Myanmar's trade policy	Dr Maung Aung Program Director, Trade Training Institute; Adviser, MOC
12:00 – 13:00	Lunch	
13:00 – 15:00	Session 2: Market Selection Analysis	Dr. Hla Theingi, Assistant Professor, Assumption University (Thailand)
15:00 – 15:15	Coffee Break	
15:15 – 17:15	Session 3: INCOTERMS & Sales Contract	U Thein Lwin General Manager (Retired) Ministry of Commerce
Day 2: 11 th October 2015 (Sunday)		
08:30 – 10:30	Session 4 : Technical Barriers to Trade	Dr. Thit Thit Lwin Adviser, MITS: Myanmar Inspection Testing Services
10:30 – 10:45	Coffee Break	
10:45 – 12:45	Session 5: Overview of international trade flow	U Thein Myint Wai Assistant Director, Trade Training Institute
12:45 – 13:45	Lunch	
13:45 – 15:45	Session 6: Custom Clearance	U Nyi Nyi Aung, Chairman, MCBA: Myanmar Customs Brokers Association
15:45 - 16:00	Coffee Break	
16:00 – 18:00	Session 7 : Consumer Affairs	U Swe Tin Kyu, Deputy Director, Consumer Affairs Unit, DTPCA Mandalay Regional Office
Day 3: 12 th October 2015 (Monday)		
08:30 – 10:30	Session 8: Export Market Plan	U Myo Min CEO & President, PS Business School
10:30 – 10:45	Coffee Break	
10:45 – 12:45	Session 9 : Shipping Documents	U Aung Khin Myint Chairman, MIFA: Myanmar International Freight

		Forwarders' Association
12:45 – 13:45	Lunch	
13:45 – 15:15	Session 10: Import-Export License/ Procedures	U Myint Kyaw Director (Import/ Export), DOT – MOC Mandalay Region
15:45 – 16:00	Coffee Break	
16:00 – 16:15	Orientation of group exercise Preparation :- ❖ Sharing how participants are groups ❖ What will be the exercise ❖ About presentation	JICA Project Team
Day 4: 13 th October 2015 (Tuesday)		
08:30 – 10:30	Session 11: Trade Information (TP Services), Trade Fairs, MTCs	Daw Naw Mutakapaw Director, Trade Fair & Trade Centers, DTPCA Nay Pyi Taw
10:30 – 10:45	Coffee Break	
10:45 – 12:45	Session 12 -1: Group Exercise: “How to extend Trade Promotion”	U Thein Lwin (leading role), U Thein Myint Wai & JICA team will facilitate for group exercise.
12:45 – 13:45	Lunch	
13:45 – 14:45	Session 12 -2: Group Presentations	❖ All participants (5 groups), ❖ Facilitators: U Thein Lwin, U Thein Myint Wai & JICA Team
14:45 – 15:00	Session 12-3 Advice by Seniors	❖ Sharing views and comments by U Thein Lwin & U Thein Myint Wai to each group and overall review.
15:00 – 15:15	Coffee Break	
15:15 – 15:45	Wrap up session	U Swe Tin Kyu, Deputy Director, Consumer Affairs Unit, DTPCA Mandalay Regional Office

(4) Major Events during the Training

Q&A Session

During the Q&A session, the following questions were raised by the participants. Lectures answered these questions.

- * How to protect domestic market and farmers from imports of higher quality and cheaper Thai rice?
- * How to improve technology in plantation and productions (rice and bean products)?
- * How to reduce production cost in Myanmar products' manufacturing?
- * How to get certificate from international laboratory and how products are inspected for obtaining ISO?
- * How can MTC share market information and extend support to regional trade centers?

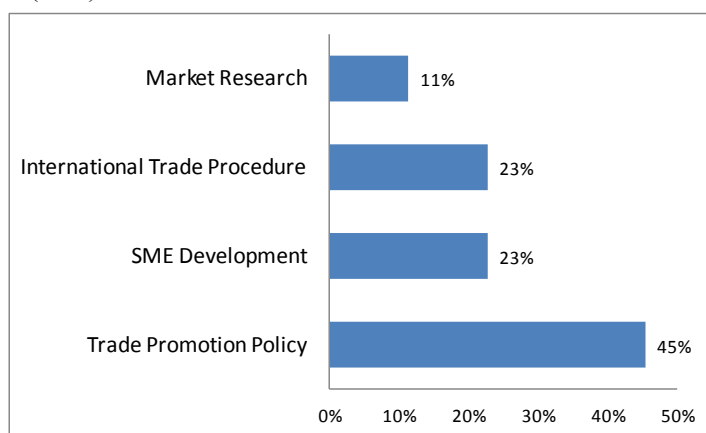
(5) Evaluation and Feedback from Participants

a. Overall Evaluation

In general, 97% of the participants agree that the course (12 subjects in this course) as a whole was useful; all are relevant to their required knowledge and skills. As far as specific subjects are concerned, the session of “Export Market Plan” was received the highest mark (87%) in terms of usefulness due to simple, interactive and practical method used by the lecturer. Other subjects highly appreciated by the participants are “Consumer Affairs” (49%), Global Trade & Myanmar Trade Policy (42%), “Technical Barriers to Trade” (40%) and “Overview of International Trade Flow” (40%).

b. Future training suggestion

For future training, 45% of the participants have indicated that they want to learn “Trade Promotion Policy”, followed by “International Trade Procedure” (23%) and “SME Development” (23%) and “Market Research” (11%).



Source: JICA Project Team

Figure 8-4 Future Training Needs by Participants in Mandalay

Furthermore, participants expressed some specific suggestions for future training course as shown in the table below. The mostly suggested request is more frequent training in order to support traders by understanding their business. Secondly, it was suggested that English trade terminology should be explained more simple and easy-to-understand manner. Thirdly, the participants want more practical exercises by using Myanmar’s success stories. These suggestions shall be considered for MOC’s future training program.

Table 2 Suggestions for Future Training Course

Description	No. of Replies	Share to Total
More frequent training at regional office	24	23%
English trade terminology	19	18%
More practical exercises	14	13%
Examples of Myanmar’s success stories	13	13%
Slower lecture speed	12	12%
Longer training period	10	10%
Others (lecture time, additional subject, etc.)	12	12%

Source: JICA Project Team



3. Post Training Evaluation

3.1 Objectives

In order to identify the impact of the trial training courses and obtain participants' feedback for better utilization of the learning of the training, post training evaluation were conducted.

The studied items were as follows:

- * How do participants evaluate the overall usefulness of the training?
- * Which subjects are most useful and why?
- * How do participants use the learning of the training in daily tasks?
- * What are the difficult issues for trade promotion activities in workplace?
- * Suggestions for future training program

The evaluation was conducted by focus group discussions (FGDs) which were carried out from October 27 to November 4, 2015, in Yangon, Patheingyi and Nay Pyi Taw, as shown in the following table.

Table 3 Outline of FGDs for Post Training Evaluation

Date	Department	Officers (Persons)	Staff (Persons)
October 27	DTPCA, Yangon Regional Office	5	
October 27	MTC, Trade Fair & MTC Division, DTPCA (NPT)		4
October 30	DTPCA, Ayerwaddy Regional Office	5	
November 3	DTPCA (NPT)	5	
November 4	DOT & DTPCA (NPT)	7	
Total		26	

Source: JICA Project Team

3.2 Results of FGDs

The result of 5 FGDs on post training evaluation can be summarized as follows:

1) Usefulness

Almost all participants appreciate the training very useful because they could extend their knowledge through the training.

2) Most useful subjects

As for Trade Promotion Training, highly appreciated subjects are “Role and Function of TPO” and “Market Information”. This is because these topics are directly linked with MOC’s trade promotion activities and they could learn how to use market information. In addition, “Case Study of TPO: JETRO” was also highly appreciated because they could learn good practice of trade promotion from JETRO’s past experiences.

On the other hand, some of participants expressed their interests to learn further detail how to prepare good market report.

As for International Trade Procedure Training, “INCOTERMS/Sales Contract” session was highly appreciated because it is very relevant with MOC’s work and deals with essential concept of international trade. Other appreciated subjects were “Export to Japanese Market” and “Market Selection Analysis” as both subjects were practical and informative by using abundant market data and information. On the other hand, subjects like “Customs Procedure” and “Letter of Credit” were not appreciated because these subjects are not very relevant with their current jobs and not very familiar.

3) Utilization of learning in daily tasks

Most of the participants replied they partially apply what they learnt at the training, but not directly in their daily tasks. This is mainly because they were busy for tackling with the past unfinished tasks and some of their tasks were not related to trade promotion. However, officers from Pathein mentioned that they used the learnt knowledge of marketing such as “competitive advantage” and “4Ps” when they wrote a report of their visit to Thai Rice Expo.

4) Difficult issues for applying what they learned in their daily tasks

The following issues have been pointed out as impediments from the participants:

i) Unfamiliar English trade terminology

English trade terminology such as INCOTERMS and tariff are difficult to understand the concept in the short training course, especially for staff. In this regard, the participants suggested continuation of training.

ii) Selection of participants

The trial training originally targeted MOC officers and staff who engage in trade promotion activities. However, in reality, the participants were chosen by MOC management mainly considering the balance of departments and location. As a result, jobs of many participants have are not related to trade promotion and they cannot utilize the learning of training in their daily tasks.

Even for the participants working for trade promotion, they are busy for their routine work and they have no time to review what they learned.

iii) Low motivation for career development due to frequent personnel transfer

MOC frequently transfers its officers/staff from one department to another with short notice and without considering individual career development. Therefore, even if an officer or staff acquires knowledge and skills by the training, he/she may be transferred to another unit or department by

management decision, which lowers his/her motivation to further develop his/her career development.

5) Future training suggestion

The participants of FGDs have made the following suggestions to further improve training program for trade promotion in the future:

i) Market intelligence/research

Although some donors like ITC-GIZ and CBI as well as JICA provide training on market intelligence-related subjects, the participants of MOC still have difficulty in applying what they learned for their daily tasks due to lack of practical exercise and experience. In this regard, they suggested an independent training course for practical data collection, compilation and analysis of a target overseas market.

ii) SME development

Most of the participants wish to learn about comprehensive SME development, for example, how to support SMEs' finance, product development and marketing, etc. They suggested SME development or private sector development course should be separately designed.

iii) Commodity product promotion

As regional offices are mandated to promote Myanmar's specific commodities like rice, sesame and beans, the participants suggested product-based promotion training targeting particular markets like Japan. They wish to know how to assure quality products towards targeted markets.

iv) Training in accordance with DTPCA's function and TPO

The participants expressed their interests in in-depth understanding of existing functions of DTPCA. In particular, based on the current 9 functional units, the respondents want to learn how they can develop these functions. In this regard, they also want to know the experiences of other countries' cases like JETRO in terms of issues, challenges and success stories.

附属資料 6 : ニーズ調査質問票

Questionnaire Sheet No
မေးခွန်းလွှာ အမှတ်

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15 May, 2015
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**Needs Survey for
the Capacity Development of Trade Promotion in Myanmar: Phase II**
မြန်မာနိုင်ငံ ကုန်သွယ်မှုမြှင့်တင်ရေးရည်မှန်းချက်ဖြင့် စွမ်းရည်ဖွံ့ဖြိုး တိုးတက်ရေး စီမံကိန်း အပိုင်း (၂)
အတွက် လိုအပ်ချက်များ သိရှိရေး စစ်တမ်း

Project undertaken for Japan International Cooperation Agency (JICA)
ဂျပန်နိုင်ငံတကာပူးပေါင်းဆောင်ရွက်ရေးအေဂျင်စီ JICA ၏ စီမံကိန်းအတွက်သာဖြစ်ပါသည်

Questionnaire for Needs Survey
လိုအပ်သည်များသိနိုင်ရန်စစ်ကောက်ယူသော မေးခွန်းလွှာ

Background

The Myanmar Government has formulated and launched the National Export Strategy (NES). The Ministry of Commerce (MOC) is one of key players of NES, especially in the field of export information and promotion. The Department of Trade Promotion (DTP) and Myanmar Trade Center (MTC) under MOC provide trade promotion services to the private sector.

Since March 2015, the Japan International Cooperation Agency (JICA), a Japanese donor in charge of Official Development Assistance, has supported MOC to enhance its trade promotion functions by implementing the Project on the Capacity Development of Trade Promotion in Myanmar: Phase II.

The JICA Project Team currently conducts a Needs Survey (the Survey) to identify and analyze the needs of the private sector for trade support services especially.

နောက်ခံသမိုင်း

မြန်မာအစိုးရသည် အမျိုးသားထုတ်ကုန်မြှင့်တင်ရေး မဟာဗျူဟာ (NES) အား ဖော်ထုတ်ပြီး စတင် အကောင်အထည်ဖော်ရန် လမ်းစဉ်ချမှတ်ခဲ့ပါသည်။ စီးပွားရေးနှင့် ကူးသန်းရောင်းဝယ်ရေး ဝန်ကြီးဌာနသည် ယင်းမဟာဗျူဟာအား အကောင်အထည်ဖော်ရန်အတွက် အဓိကအခန်းကဏ္ဍမှနေ၍ ပါဝင်ပြီး အထူးသဖြင့် ပို့ကုန်ဆိုင်ရာ သတင်းအချက်အလက်များနှင့် ပို့ကုန်မြှင့်တင်ရေး ကဏ္ဍများတွင် ဆောင်ရွက်ပါသည်။ စီးပွားရေးနှင့် ကူးသန်းရောင်းဝယ်ရေး ဝန်ကြီးဌာန၏ လက်အောက်တွင်ရှိသော ကုန်သွယ်မှုမြှင့်တင်ရေး ဌာနနှင့် မြန်မာကုန်သွယ်မှု ဗဟိုဌာနတို့သည် ပုဂ္ဂလိက အခန်းကဏ္ဍများသို့ ပို့ကုန်မြှင့်တင်ရေးအတွက် ဝန်ဆောင်မှုများအား အထောက်အကူ ပြုရန် ဖြစ်ပါသည်။

မတ်လ၊ ၂၀၁၅ မှစတင်၍ ဂျပန်အလှူရှင်တို့ ၏ တရားဝင်ခန့်အပ်ထားသော လုပ်ငန်း ဖွံ့ဖြိုးတိုးတက်ရေးဆိုင်ရာ အထောက်အကူပြု အဖွဲ့အစည်းဖြစ်သော ဂျပန်နိုင်ငံတကာ ပူးပေါင်းဆောင်ရွက်ရေး အေဂျင်စီ (JICA) သည် မြန်မာနိုင်ငံကုန်သွယ်မှု မြှင့်တင်ရေးရည်မှန်းချက်ဖြင့် စွမ်းရည်ဖွံ့ဖြိုး တိုးတက်ရေး စီမံကိန်းအပိုင်း (၂)

အားအကောင်အထည်ဖော်ရင်းဖြင့် စီးပွားရေးနှင့် ကူးသန်းရောင်းဝယ်ရေး ဝန်ကြီးဌာန၏ ပို့ကုန်မြှင့်တင်ရေး လုပ်ငန်းစဉ်များအား တိုးမြှင့်ဆောင်ရွက်စေရန်အတွက် ဝန်ကြီးဌာနသို့ အကူအညီပေးလျှက်ရှိပါသည်။

ဂျပန်နိုင်ငံတကာ ပူးပေါင်းဆောင်ရွက်ရေးအေဂျင်စီ၏ စီမံကိန်းအဖွဲ့အနေဖြင့် လက်ရှိတွင် ပုဂ္ဂလိကကဏ္ဍ၏ လိုအပ်ချက်များ အထူးသဖြင့် နိုင်ငံတကာကုန်သွယ်ရေးအတွက် ဝန်ဆောင်မှုအကူအညီ အထောက်အကူပြုခြင်းဆိုင်ရာ လိုအပ်ချက်များ သိနိုင်ပါရန် စစ်တမ်းကောက်ယူခြင်း ကို ဆောင်ရွက်ခြင်း ဖြစ်ပါသည်။

If you face any difficulty in filling in the questionnaire or have any additional query, please contact with-

လူကြီးမင်းတို့ ယခုမေးခွန်းလွှာအားဖြေဆိုရာတွင် အခက်အခဲတစ်ခုခုရှိခဲ့ပါက သို့မဟုတ် မေးမြန်းရန် အကြောင်းရှိလာ၍ ဖြစ်စေ အောက်ပါပုဂ္ဂိုလ်အား ဆက်သွယ်မေးမြန်းနိုင်ပါသည်

Kazuo Mishima: Project Team Leader (mishima-kz@n-koei.co.jp)
 Chaw Htet Myat: Trade Promotion Expert (chawhtatmyat@gmail.com) Phone: 09795135166

1. Company Profile: (ကုမ္ပဏီ အကြောင်း)

(1) Name of the Organization :
 အဖွဲ့အစည်းအမည်

(2) Address :
 လိပ်စာ

(3) Name and designation of respondent/contact person:
 ဖြေကြားပေးသူ/ဆက်သွယ်မေးမြန်းနိုင်သူ၏ အမည် နှင့် ရာထူး

(4) Phone number :
 တယ်လီဖုန်းနံပါတ်

(5) E-mail :
 အီးမေးလ်

(6) Year of establishment :
 တည်ထောင်သည့်နှစ်

(7) Amount of latest paid-up capital:
 နောက်ဆုံးမတည်ရင်းနှီးငွေရင်း

(8) No. of employees (ဝန်ထမ်းအရေအတွက်)

No. of employees	Check - စစ်ပေးပါ ¹
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¹ (ကိုက်ညီသည်ကို အမှတ်အသားဖြစ်ပေးပါရန်)

1) 1~4 (တစ်ဦးမှ လေးဦးအထိ)	
2) 5~9 (ငါးဦးမှ ကိုးဦးအထိ)	
3) 10~49 (ဆယ်ဦးမှ လေးဆယ့်ကိုးဦးအထိ)	
4) 50~ (ငါးဆယ်နှင့် အထက်)	

(9) Ownership structure (ပိုင်ဆိုင်မှုပုံစံ/ ဖွဲ့စည်းပုံ)

Ownership structure	Check
1) Foreign owned company (Foreign share: 100%) နိုင်ငံခြားသားပိုင် ကုမ္ပဏီ နိုင်ငံခြားသားရှယ်ယာ ၁၀၀%	
2) Joint venture (Foreign share: 50 ~ 99.99%) ဖက်စပ်နိုင်ငံခြားသား ရှယ်ယာ ၅၀ မှ ၉၉.၉၉% ကြား	
3) Joint venture (Foreign share: 0.01 ~ 49.99%) ဖက်စပ်နိုင်ငံခြားသားရှယ်ယာ ၀.၀၁ မှ ၄၉.၉၉% ကြား	
4) Domestic company (Foreign share: 0%) နိုင်ငံသားပိုင်ကုမ္ပဏီ နိုင်ငံခြားသားရှယ်ယာ ၀%	

(10) Business sector (လုပ်ငန်းကဏ္ဍ)

(Single choice: Please choose the business sector where its product shows the highest contribution to the company's sales).

(အဖြေတစ်ခုသာရွေးရန် - ကျေးဇူးပြု၍ ကုမ္ပဏီ၏ အရောင်းတွင် ရောင်းအားအကောင်းဆုံး ထုတ်ကုန်၏ လုပ်ငန်းကဏ္ဍကိုသာ ရွေးချယ်ပေးပါရန်)

Business sector	Check
1) Agri business (စိုက်ပျိုးရေး လုပ်ငန်း)	
2) Fishery business (ငါးဖမ်းလုပ်ငန်း)	
3) Forestry business (wood working, timber, etc.) သစ်တောလုပ်ငန်း (သစ်/ ကျွန်း အစရှိသော)	
4) Mining business (including jewelry) မိုင်း (ရတနာ လုပ်ငန်း အပါအဝင်)	
5) Manufacturing business (garment, food processing, beverage, shoe, furniture, handcraft, etc.) ကုန်ထုတ် လုပ်ငန်း (အထည်/ စားသောက်ကုန်/ အချိုရည်/ ဖိနပ်/ ပရိဘောဂ/ လက်မှုပစ္စည်း အစရှိသော)	
6) Others (Please specify) အခြား လုပ်ငန်းများ(လုပ်ငန်းကဏ္ဍအားဖော်ပြပေးပါရန်)	
Name of main export product(s)	a.
	b.

(အဓိကပို့ကုန်တို့၏အမည်များ)	c.
Name of main import material/product(s) (အဓိက တင်သွင်းသော ပစ္စည်း/ကုန်တို့၏အမည်များ)	a.
	b.
	c.

(11) Trade Performance (ကုန်သွယ်ရေး အနေအထား)

1) How many years of experiences in international trading does your company have? years (If “0”, go to “2. Trade Information Source”)

နိုင်ငံတကာကုန်သွယ်ရေး တွင် လူကြီးမင်းတို့ကုမ္ပဏီအနေဖြင့် နှစ်ပေါင်းမည်မျှအတွေ့အကြုံရှိပါပြီလဲ။ (.....)နှစ် အကယ်၍သင့်သည်သာရှိပါက(တနည်းအားဖြင့်လုံးဝကုန်မသွယ်ရသေးပါက) အောက်တွင်ရှိသော မေးခွန်းအမှတ် ၂ ကုန်သွယ်မှု သတင်းရယူနိုင်သောနေရာ/နည်းနာများ နေရာတွင်ဆက်ဖတ်ဖြေရန်ဖြစ်ပါသည်။

2) Export and import ratio in the 2012 or 2011 (for export : % of turnover; for import: % of purchase excluding the machineries cost) ၂၀၁၂ သို့မဟုတ် ၂၀၁၁ ၏ ပို့ကုန် သွင်းကုန် အချိုး (ပို့ကုန် အတွက်: %အနုတ်အသိမ်း ရာခိုင်နှုန်း/သွင်းကုန်အတွက်%စက်ပစ္စည်း တန်ဖိုးများအပါအဝင် ဝယ်ယူရ သောပမာဏ ပယ်ပြီး ရာခိုင်နှုန်း)	A. Export ratio ပို့ကုန်အချိုး	Check (%)	B. Import ratio သွင်းကုန်အချိုး	Check (%)
	a) 100%		a) 100%	
	b) 75 ~ 99.99 %		b) 75 - 99.99%	
	c) 25 ~ 74.99%		c) 25 - 74.99%	
	d) 0.01 ~ 24.99%		d) 0.01% - 24.99%	
	e) 0%		e) 0%	
3) Export/import destination ပို့ကုန်/သွင်းကုန် ကုန်သွယ်သော နေရာများ	Major export/import countries အဓိက ပို့ကုန်/သွင်းကုန် နိုင်ငံများ			Volume(%) ပမာဏ
A. Choose major <u>export destination</u> countries(up to 3 destinations) and write % of volume to the total export, if any. အဓိက ပို့ကုန် ကုန်သွယ် နိုင်ငံ (၃ နိုင်ငံ အထိ) ကိုရွေး၍ ပို့သော ပမာဏ ရှိပါက ၎င်းကိုပါ တပါတည်းဖော်ပြပေးပါရန်	a) ASEAN countries			
	b) Japan			
	c) China (including Hong Kong)			
	d) US			
	e) EU			
	f) Others (Please specify the name of country/countries:)			

B. Choose major <u>import origin</u> countries (up to 3 destinations) and write % of volume to the total import, if any. အဓိကသွင်းကုန် ကုန်သွယ် နိုင်ငံ (၃ နိုင်ငံ အထိ) ကိုရွေး၍ ပို့သော ပမာဏ ရှိပါက ၎င်းကိုပါ တင်ပြပေးပါရန်	a) ASEAN countries	
	b) Japan	
	c) China (including Hong Kong)	
	d) US	
	e) EU	
	f) Others (Please specify the name of country/countries:)	

(12) Experience of participation in Trade Training Institute (TTI)'s training programs

Have you or your company's employees participated TTI's training programs?

TTI ၏သင်တန်းများကို တက်ရောက်ဖူးပါသလား ။ TTI၏ သင်တန်းများကို ကိုယ်တိုင်သော်၎င်း/ကုမ္ပဏီမှ ဝန်ထမ်း များ သော်၎င်း တက်ရောက်ဖူးပါသလား။

Yes သိပါသည်။ No မသိပါ။

2. Trade Business Environment (ကုန်သွယ်စီးပွားဝန်းကျင်)

Please evaluate the trade business environment in Myanmar. Please check each item by four criteria: A: Excellent; B: Good; C: Fair; D: Bad (Single choice in each category)

မြန်မာနိုင်ငံ၏ ကုန်သွယ်စီးပွားဝန်းကျင်ကို သုံးသပ်ပေးပါရန်။ အောက်ဖော်ပြပါ အချက်များအား - **A. အကောင်းဆုံး** **B.ကောင်းမွန်သည်** - **C.သာမန်** - **D.ဆိုးရွားသည်** -စသည်ဖြင့် အဆင့်လေးဆင့် သတ်မှတ်ပေးရန်ဖြစ်ပါသည်။ (အဖြေတစ်ခုသာရွေးရန် ဖြစ်ပါသည်။)

Item စဉ်	Content အကြောင်းအရာ	A Excellent	B Good	C Fair	D Bad	Not Applicable/ don't know
(1)Trade Policy & Regulations ကုန်သွယ်ရေးမူဝါဒများနှင့် စည်းမျဉ်းစည်းကမ်းများ	1)Free trade regime (AFTA, etc) (လွတ်လပ်သောကုန်သွယ်ရေးမူဝါဒ)					
	2)Import policy (သွင်းကုန်မူဝါဒ)					
	3)Export policy (ပို့ ကုန်မူဝါဒ)					
	4)Transparency (ပွင့်လင်းမြင်သာမှု)					
(2)Trade Administrative Procedure	1)Import tariff (သွင်းကုန် အကောက်ခွန်)					
	2)Export tariff (ပို့ ကုန် အကောက်ခွန်)					

Item စဉ်	Content အကြောင်းအရာ	A Excellent	B Good	C Fair	D Bad	Not Applicable/ don't know
ကုန်သွယ်ရေးစီမံ ဆောင်ရွက်ခြင်း နည်းလမ်းများ	3)Customs clearance (ဆိပ်ကမ်း ရှင်းလင်းရေး)					
	4)Trade general license (ကုန်သွယ်ရေး အထွေထွေ လိုင်စင်)					
	5)Import license/permit (သွင်းကုန် လိုင်စင်/ ခွင့်ပြုမိန့်)					
	6)Export license/permit (ထုတ်ကုန် လိုင်စင်/ ခွင့်ပြုမိန့်)					
	7)Bonded warehouse license (ဆိပ်ကမ်း ကပ်လျှက်တည်ရှိသည့် ပိုထောင် ခွင့်ပြုမိန့်)					
	8)Transparency (ပွင့်လင်း မြင်သာမှု)					
(3)Logistic ကုန်သွယ်မှုအတွက် ထောက်ပံ့ပို့ဆောင်ရေး စီမံဖွဲ့စည်းမှု	1)Ocean freight service ပင်လယ်ဖြတ်သယ်ယူပို့ ဆောင်ရေးဆို င်ရာ					
	2)Air freight service (လေကြောင်းဖြင့်သယ်ယူပို့ ဆောင် ရေး ဝန်ဆောင်မှု)					
	3)Land transport service (ကုန်းလမ်းဖြင့် သယ်ယူ ပို့ ဆောင်ရေး ဝန်ဆောင်မှု)					
	4)Railways service (ရထားဖြင့် သယ်ယူပို့ ဆောင်ရေး ဝန်ဆောင်မှု)					
	5)River based transport service (ရေလမ်းဖြင့် သယ်ယူပို့ ဆောင်ရေး ဝန်ဆောင်မှု)					
(4)Trade finance ကုန်သွယ်ရေးငွေကြေး ထောက်ပံ့မှု ဆိုင်ရာ	1) Fund settlement (L/C, etc.) (ရံပုံငွေ ပေးချေမှု)					
	2) Export/import credit (ပို့ ကုန် သွင်းကုန် အကြွေး)					
(5)Trade related insurance ကုန်သွယ် ရေး ဆက်စပ်အာမခံ	1) Trade insurance (ကုန်သွယ်ရေး အာမခံ)					
	2)Ocean freight insurance (ပင်လယ်ဖြတ်သယ်ယူပို့ ဆောင်ရေး					

Item စဉ်	Content အကြောင်းအရာ	A Excellent	B Good	C Fair	D Bad	Not Applicable/ don't know
	ဆိုင်ရာ အာမခံ)					
(6)Others အခြား	1)(Specify :....) (ဖော်ပြပေးပါရန်)					

3. Area of Problems to Expand International Trading Business Activities

နိုင်ငံတကာဈေးကွက်တွင် ကုန်သွယ်ရေးတိုးချဲ့ဖြန့်ကျက် လုပ်ဆောင်ရာ၌ ကြုံဆုံရသော အခက်အခဲများ

What kind of problems should be improved to expand your international trading business activities? (Multiple choice)

လူကြီးမင်းတို့၏ နိုင်ငံတကာဈေးကွက်တွင် ကုန်သွယ်ရေးအဆင်ပြေရန်ဘယ်အချက်တွေကို ပိုမိုကောင်းမွန်တိုးတက်အောင် လုပ်ဆောင်သင့်ပါသလဲ။ (အဖြေ တစ်ခုထက်ပိုပြီး ရွေးနိုင်ပါသည်။)

Area of constraints အတားအဆီးများ	Check
1) Market access/Sales promotion (ဈေးကွက်အတွင်းထိုးဖောက်နိုင်ရေး/အရောင်းမြှင့်တင်ရေး)	
2) Finance (export/import credit, L/C, export insurance, etc.) ဘဏ္ဍာရေး (ကုန်သွယ်ရေး ငွေကြေးထောက်ပံ့မှု ဆိုင်ရာ)	
3) Production Technology/Quality Control (ကုန်ထုတ်နည်းပညာ/အရည်အသွေးထိန်းသိမ်းခြင်း)	
4) Training (Human Resource Development) သင်တန်း (လူ့စွမ်းအားအရင်းအမြစ်များ ဖွံ့ဖြိုးတိုးတက်ရေး)	
5) Legal matters (contract drafting, contract negotiation, etc.) ဥပဒေ စာချုပ် (အကြမ်းရေးဆွဲခြင်း/စာချုပ် အတွက် ညှိနှိုင်းဆောင်ရွက်ခြင်း စသည်)	
6) Communication (English communication skills, etc.) ပြောဆိုဆက်သွယ်ခြင်း (အင်္ဂလိပ်စကားပြောဆိုနိုင်မှု စသည်)	
7) Logistic (transportation, customs clearance, warehouse, etc.) ကုန်ပို့ဆောင်ခြင်းဆိုင်ရာ ထောက်ပံ့ပို့ဆောင်ရေး (ကုန်ပို့လမ်းကြောင်းများ/ အကောက်အခွန်/ ဝိုဒေါင် စသည်)	
8) Information Communication Technology (ICT) သတင်းအချက်အလက်ဆိုင်ရာ နည်းပညာ	
9) Infrastructure (road, electricity, gas, water, etc.) အခြေခံအဆောက်အအုံ (လမ်း/မီး/ဓာတ်ငွေ့/ရေ စသည်)	
10) Others (Please specify) အခြား အခက်အခဲများရှိပါက (ကျေးဇူးပြု၍ ဖော်ပြပေးပါရန်)	

Please describe the above problems (especially the most serious problem) in detail.

အထက်ဖော်ပြပါ အတားအဆီးများမှ အရေးအကြီးဆုံး အစိုးရိမ်ရဆုံးအခက်အခဲအားအသေးစိတ် ဖော်ပြပေးပါရန် ။

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4. Trade Information Source (ကုန်သွယ်မှု သတင်းရယူနိုင်သောနေရာ/နည်းနာများ)

How did you get necessary market (buyers/suppliers) information needed to start export/import activities? (Multiple choice)

ပိုကုန်/သွင်းကုန် ကုန်သွယ်ရေးလုပ်ငန်းဆောင်တာများအတွက် လိုအပ်သော ဝယ်သူ/ ရောင်းသူလုပ်ငန်း အဆက်အသွယ် စသည့် သတင်းအချက်အလက်များကို သင်ဘယ်လိုရယူခဲ့ပါသလဲ။ (အဖြေ တစ်ခုထက်ပိုပြီး ရွေးနိုင် ပါသည်။)

Information Source	Check
1) Relevant Website အင်တာနက်ပေါ်တင်ထားသည့် ဆက်စပ်သောဘာသာရပ်ဆိုင်ရာ သတင်းအချက်အလက်	
2) Trade fair/exhibition ကုန်စည်ပြပွဲ/ ပြခန်းများ	
3) Government institutions (Please specify the name:) ဌာနဆိုင်ရာအဖွဲ့အစည်းများ (အမည်ကိုပါ တပါတည်းရေးပေးပါရန်.....)	
4) Private institutions (Please specify the name:) ပုဂ္ဂလိက အဖွဲ့အစည်းများ (အမည်ကိုပါ တပါတည်းရေးပေးပါရန်.....)	
5) Friends/relatives သူငယ်ချင်းများ/ဆွေမျိုးများမှတစ်ဆင့် ရရှိသည်။	
6) Others (Please specify:) ဖော်ပြပါ နည်းများတွင်မပါဝင်သော အခြားနည်းများဖြင့် သတင်းရပါက (ကျေးဇူးပြု၍ အမည်ကိုဖော်ပြ ပေး ပါရန်)	

5. Trade Related Knowledge and Learning

ကုန်သွယ်ရေးဆိုင်ရာ အသိပညာ နှင့် သင်ယူလေ့လာမှုဆိုင်ရာ

How do employees of your company learn international trading business? (Multiple choice)

အပြည်ပြည်ဆိုင်ရာ ကုန်သွယ်မှုလုပ်ငန်းအတွက် သင်၏ဝန်ထမ်းများမည်သို့လေ့လာသင်ယူပါသလဲ။

Means of Acquiring Knowledge and Learning အသိပညာ နှင့် သင်ယူလေ့လာမှုဆိုင်ရာ နည်းလမ်းများ	Check
1) On the job training / On their own အလုပ်လုပ်ရင်းလေ့လာသည်/ ကိုယ်တိုင်လေ့လာသည်	
2) Taking a training course implemented at the company	

ကုမ္ပဏီ ၏ အထောက်အပံ့ဖြင့်သင်တန်းတက်သည်	
3) Taking a training course implemented by governmental institutions (Please specify the name: Ex. MOC.....) အစိုးရဌာနဆိုင်ရာတို့မှ ဖွင့်လှစ်ပေးသော သင်တန်းကိုတက်သည် တက်ရောက်သော ဌာန/အဖွဲ့အစည်းအမည်ကိုရေးပေးပါ	
4) Taking a training course implemented by non-governmental/private organizations (Please specify the name: Ex. UMFCCL.....) အစိုးရမဟုတ်သော-ဌာနဆိုင်ရာတို့မှ ဖွင့်လှစ်ပေးသော သင်တန်းကိုတက်သည် တက်ရောက်သော ဌာန/အဖွဲ့အစည်းအမည်ကိုရေးပေးပါ	
5) Attending a seminar on a specific topic organized by governmental organizations (Please specify the name:) အစိုးရနှင့်ဆက်စပ်သော အဖွဲ့အစည်းများမှ ခေါင်းစဉ်ဖြင့်စီစဉ်သော ဆွေးနွေးပွဲတစ်ခုခုကို တက်ရောက်ဖူးခြင်း	
6) Attending a seminar on a specific topic organized by non-governmental /private organizations (Please specify the name:) အစိုးရမဟုတ်သော အဖွဲ့အစည်းများမှ ခေါင်းစဉ်ဖြင့်စီစဉ်သော ဆွေးနွေးပွဲတစ်ခုခုကို တက်ရောက်ဖူးခြင်း	
7) Others (Please specify) အခြား အသိပညာနှင့်သင်ယူလေ့လာမှုဆိုင်ရာနည်းနာ များရှိပါက (ကျေးဇူးပြု၍ ဖော်ပြပေးပါရန်)	

Note: MOC: Ministry of Commerce; UMFCCL: Union of Myanmar Federation Chamber of Commerce and Industry

5. Needs of Trade Promotion Services

ကုန်သွယ်မှုတိုးမြှင့်ရေး အထောက်အကူဝန်ဆောင်မှုများအတွက် လိုအပ်သည်များ

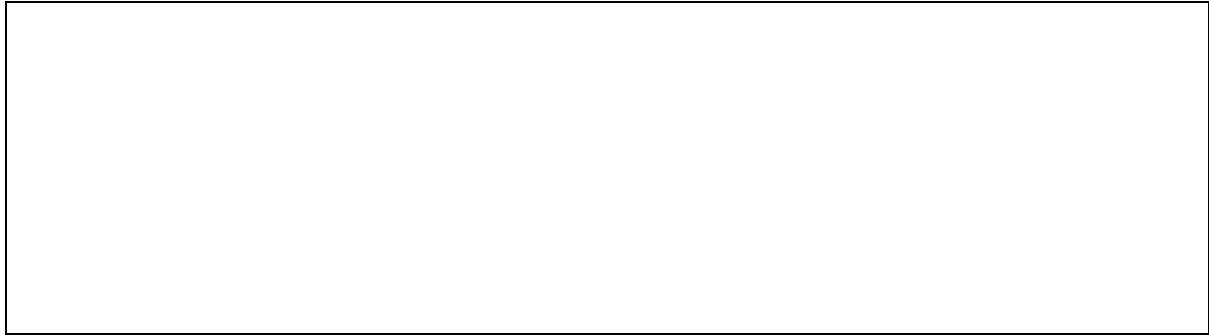
What kind of trade promotion supports does your company expect from international trade promotion institutes? (Multiple choice)

နိုင်ငံတကာကုန်သွယ်မှုမြှင့်တင်ရေးသင်တန်းကျောင်းများတွင် ကုန်သွယ်မှုတိုးမြှင့်ရေးဆိုင်ရာ ဘယ်လိုအထောက်အကူများအားမျှော်လင့်ပါသလဲ။

	Contents	Check
1)	Trade information (ကုန်သွယ်ရေးဆိုင်ရာ သတင်းအချက်အလက်များ)	
	Global market trend (နိုင်ငံတကာ ဈေးကွက်အလားအလာ)	
	Market information of specific country (အထူးပြုထားရာ နိုင်ငံတစ်ခု၏ ဈေးကွက်ဆိုင်ရာ သတင်းအချက် အလက်)	
	Access to the list of overseas buyers (နိုင်ငံရပ်ခြားရှိ ဝယ်လက်များ၏ စာရင်းကို လက်လှမ်းနိုင်မှု အခြေအနေ)	
	Rules, regulations, standards of overseas markets	

	<p>(နိုင်ငံရပ်ခြားရှိ ဈေးကွက်များ၏ စည်းမျဉ်း၊ စည်းကမ်း နှင့် စံချိန် စံနှုန်းများ)</p> <p>Trade fairs and exhibitions ကုန်သွယ်ရေးပြပွဲ/ကုန်စည်ပြပွဲ</p> <p>AEC, FTA, preferential trade agreement (လအာဆီယံ မြန်မာ စီးပွားရေး အသိုင်း အဝိုင်း၊ လွတ်လပ်သော ကုန်သွယ်ရေး သဘောတူညီချက်စာချုပ်၊ ဦးစားပေး ကုန်သွယ်ရေး သဘောတူညီချက်စာချုပ်)</p> <p>Others, specify (အခြား၊ ကျေးဇူးပြု ဖော်ပြပေးပါရန်)</p>	
2)	<p>Trade consultation (ကုန်သွယ်ရေးဆိုင်ရာ အကြံပြုချက်များ)</p> <p>Export guide in general (ပို့ ကုန်လမ်းညွှန် အထွေထွေ)</p> <p>International marketing including how to find buyers (ဝယ်လက်မည်ကဲ့သို့ ရှာရမည်ဆိုသည့်နည်းလမ်း အပါအဝင် နိုင်ငံတကာ ဈေးကွက် ရှာဖွေရေး)</p> <p>Export & import procedures including customs clearance and logistics (ဆိပ်ကမ်းရှင်းလင်းရေးနှင့် ထောက်ပံ့ပို့ ဆောင်ရေး လုပ်ငန်းစဉ် အပါအဝင် သွင်းကုန်/ ပို့ ကုန်လုပ်ငန်းစဉ်များ)</p> <p>How to comply with regulations of overseas markets (နိုင်ငံတကာ ဈေးကွက်များ၏ စည်းမျဉ်းအား မည်သို့ လိုက်နာရမည်ဆိုသည့် နည်းလမ်းများ)</p> <p>How to develop exportable products (နိုင်ငံခြားသို့ တင်ပို့ နိုင်သော ပို့ ကုန်များကို မည်သို့ တိုးတက်အောင်လုပ်မည်)</p> <p>Others, specify (အခြား၊ ကျေးဇူးပြု ဖော်ပြပေးပါရန်)</p>	
3)	<p>Exhibition/trade fair ကုန်သွယ်ရေးပြပွဲ/ကုန်စည်ပြပွဲ</p>	
4)	<p>Business matching service သင့်တော်ရာ လုပ်ငန်းချင်းတွဲဖက်ပေးမှု</p>	
5)	<p>Export/import finance ပို့ကုန်/သွင်းကုန်ဘဏ္ဍာရေးဆိုင်ရာများ</p>	
6)	<p>Training သင်တန်းများ</p>	
7)	<p>Other, specify (အခြား၊ ကျေးဇူးပြု ဖော်ပြပေးပါရန်)</p>	

Please describe the above trade promotion supports (especially the most important support) in detail.
အရေးအကြီးဆုံးလိုအပ်နေသော ကုန်သွယ်မှုတိုးမြှင့်ရေးဆိုင်ရာ အထောက်အကူအားအဘယ်ကြောင့်လိုရသည်ကို အသေးစိတ်ဖော်ပြပေးပါရန်။



6. About Department of Trade Promotion and Consumers Affairs (DoTPCA)*, Myanmar Trade Center (MTC), and Trade Training Institute (TTI)

သကုန်သွယ်မှု မြှင့်တင်ရေးနှင့် စားသုံးသူရေးရာဌာန၊ မြန်မာ့ကုန်သွယ်မှု ဗဟိုဌာနနှင့် ကုန်သွယ်မှု သင်တန်းကြောင်း

Since 2014 MTC has been established at the branches of the Ministry of Commerce (MOC) (currently in Yangon, Mandalay, Ayer and Myitkyina, and to be expanded to all regions) with the purpose of providing trade-related information to exporters and foreign buyers. TTI, established in October 2012, has been providing training programs to business persons on international trading business.

* According to the reshuffle of MOC, the former Department of Trade Promotion was reorganized as the Department of Trade Promotion and Consumers Affairs.

စီးပွားရေးနှင့်ကူးသန်းရောင်းဝယ်ရေးဝန်ကြီးဌာနသည် လက်အောက်ရှိ ဌာနခွဲများတွင် ၂၀၁၄ မှစတင်၍ မြန်မာ့ ကုန်သွယ်မှုဗဟိုဌာန (လက်ရှိတွင် ရန်ကုန်၊ မန္တလေး၊ ဧရာဝတီတိုင်းနှင့် ကချင်ပြည်နယ်၊ မြစ်ကြီးနား တို့တွင် တည်ထောင်ထားပြီး နောင်တွင်နယ်မြေဒေသအားလုံးတွင်တည်ထောင်ရန်ဖြစ်သည်) အားတည်ထောင်၍ ပို့ကုန် လုပ်ငန်းရှင်များ နှင့် နိုင်ငံတကာ ဝယ်လက်များသို့ ကုန်သွယ်ရေးနှင့် သက်ဆိုင်သည့် သတင်းအချက် အလက်များအား ထောက်ပံ့နိုင်ရန် ရည်ရွယ်ထားပြီး ဖြစ်ပါသည်။ စီးပွားရေးနှင့် ကူးသန်း ရောင်းဝယ်ရေးဝန်ကြီးဌာနမှ အောက်တိုဘာလ၊ ၂၀၁၂မှ စ၍ ဖွင့်လှစ်ခဲ့သည့် ကုန်သွယ်မှုသင်တန်းကျောင်းသည် စီးပွားရေးနှင့် ကုန်သွယ်ရေး လုပ်ဆောင်နေသော လုပ်ငန်းရှင်များအား နိုင်ငံတကာဈေးကွက်တွင် ယှဉ်ပြိုင်ထိုးဖောက်နိုင်ရေးအတွက် သင်တန်းများအား ဖွင့်လှစ် သင်ကြားပေးလျက် ရှိပါသည်။

* စီးပွားရေးနှင့် ကူးသန်းရောင်းဝယ်ရေး ဝန်ကြီးဌာန၏ ဌာနအပြောင်းအလဲကြောင့် ယခင်က ကုန်သွယ်မှုမြှင့်တင်ရေးဌာနအား ကုန်သွယ်မှု မြှင့်တင်ရေးနှင့် စားသုံးသူရေးရာဌာနအဖြစ် ပြောင်းလဲသတ်မှတ်ကြောင်း သိရပါသည်။

(1) Have you known the name of DoTPCA, MTC, TTI and their trade promotion services/training activities?

ကုန်သွယ်မှုသင်တန်းကျောင်းနှင့်၎င်း၏ လှုပ်ရှားမှုများကို သင်သိပါသလား။

Yes သိပါသည်။ No မသိပါ။

(2) If the above answer is “Yes”, how did you know about them? (Multiple choice)

သိပါသည် ဆိုလျှင်ထိုကုန်သွယ်မှုသင်တန်းကျောင်းအား သင်ဘယ်လိုနည်းနဲ့ သိခဲ့တာပါလဲ။

	Information source	Check		
		DoTPCA	MTC	TTI
1)	TV ရုပ်မြင်သံကြားမှတစ်ဆင့်			

2)	Newspaper(specify name:) သတင်းစာများ (သတင်းစာ၏အမည် ဖော်ပြပါ)			
3)	Journal/magazine (specify name:) ဂျာနယ် မဂ္ဂဇင်းများ			
4)	Website			
5)	Government အစိုးရ			
6)	Friends/relatives သူငယ်ချင်းများ/ဆွေမျိုးများ			
7)	Other, specify (အခြား၊ ကျေးဇူးပြု ဖော်ပြပေးပါရန်)			

7. Free comments

အခြားမှတ်ချက်ပြုချက်များရေးလိုက လွတ်လပ်စွာ ရေးသားရန်။

Thank you very much for your cooperation.

Your answer to this questionnaire is very valuable for the future design of technical cooperation to international trading business in Myanmar.

ယခုကဲ့သို့ အချိန်ပေးပါဝင်ဖြေကြားပေးခြင်းအား ကျေးဇူးအထူးတင်ရှိပါသည်။

လူကြီးမင်း၏အဖြေများသည် နိုင်ငံတကာဈေးကွက်တွင် ယှဉ်ပြိုင်ထိုးဖောက်နိုင်ရေးအတွက် ရည်ရွယ်သော အနာဂတ် စီးပွားရေးနှင့် ကုန်သွယ်ရေး ဆိုင်ရာနည်းပညာပူးပေါင်းကူညီမှုအတွက်တန်ဖိုးရှိလှပါတော့သည်။ ။

附属資料 7 : ASEAN 視察調査報告

Record of the ASEAN Study Tour

I. Outline of the Study Tour

(1) Objective

The Project surveyed several trade promotion organizations (TPOs) with the purpose of studying TPO's roles and their organization systems and functions, identifying issues and lessons for MOC, and considering the future direction of MOC. The result of this study is expected to contribute to the roadmap for trade promotion.

As the targets of ASEAN Study Tour, the JICA Project Team chose the following three TPOs which can be models of good trade promotion services:

- MATRADE;
- The Directorate General of National Export Development (DGNED) including the Indonesia Export Training Center (IETC) of the Ministry of Trade (MOT); and
- JETRO offices in Malaysia and Indonesia.

In addition to these TPOs, organizations which engage in export promotion in both countries were surveyed during the study tour.

The major study items were as follows;

- i) Trade promotion policies and strategies
- ii) Current trade promotion services
- iii) Management and operation system
- iv) Developments and the success stories
- v) Key factors for successful provision of trade promotion services
- vi) How to conduct needs assessment (service needs) and how to make development plan for the respective services
- vii) HRD efforts
- viii) Cooperation with stakeholders (between TPO and private sector, among TPOs, among private sectors, etc)
- ix) Other related issues

(2) Schedule

The study tour was conducted during the period from 9th until 15th August 2015 including international travel from/ to Yangon. All the meeting arrangements were successfully made as planned. Detailed schedule is shown as below.

Table: Schedule for the Study Tour

	Date	Time	Activity	Place to Stay
1	Sun, 9 th August	12:15-16:30	Move to KL from YGN	Kuala Lumpur (KL)
2	Mon, 10 th August	9:00-10:00 15:00-16:00	National Chamber of Commerce & Industry Malaysia (NCCIM) SME Corporation Malaysia	KL
3	Tue, 11 th August	9:00-16:00	MATRADE	KL
4	Wed, 12 th August	10:00-11:00 16:25-17:30	JETRO Malaysia Move to JKT from KL	Jakarta (JKT)
5	Thu, 13 th August	10:00-16:00	Directorate General of National Export Development (DGNEDE), Ministry of Trade (MOT) Indonesia	JKT
6	Fri, 14 th August	10:00-11:30 14:00-15:00 16:00-17:00	Indonesia Export Training Center (IETC), MOT JETRO Indonesia Indonesia Chamber of Commerce and Industry (KADIN)	JKT
7	Sat, 15 th August	09:40-14:50	Move to YGN from JKT (transit at KL)	

(3) Participants

Five officers from the Department of Trade Promotion and Consumers Affairs, MOC (the member of the Working Groups of the Project) participated in the study tour. The mission was also accompanied by Mr. Tsutomu Nagae from JICA HQ and Mr. Kazuo Mishima, the team leader of the Project. The participants are listed as below.

Table: List of the Participants

	Name	Position
1	Mr. Myint Lwin	Deputy Director General of the Domestic Trade Promotion Division
2	Mr. Khin Maung Hlaing	Director of the Policy and Planning Division
3	Ms. Naw Mutakapaw	Director of the Trade Fairs and Exhibitions Division
4	Ms. Mya Mya Sein	Deputy Director of the Myanmar Trade Center
5	Mr. Myo Thu	Director of the Mandalay Regional Office
6	Mr. Tsutomu Nagae	Visiting Senior Advisor, JICA
7	Mr. Kazuo Mishima	Team Leader for the project for the Capacity development of Trade Promotion in Myanmar: Phase II

II. Implementation Procedure

(1) Planning and Preparation

MOC and JICA Project Team firstly made a brief plan including the purpose of the study tour,

organizations to visit and draft schedule. JICA Project Team consulted with JICA headquarters on the plan at the same time and coordinated with MOC before finalizing the study plan. The brief sequence to realize the study tour is outlined as below.

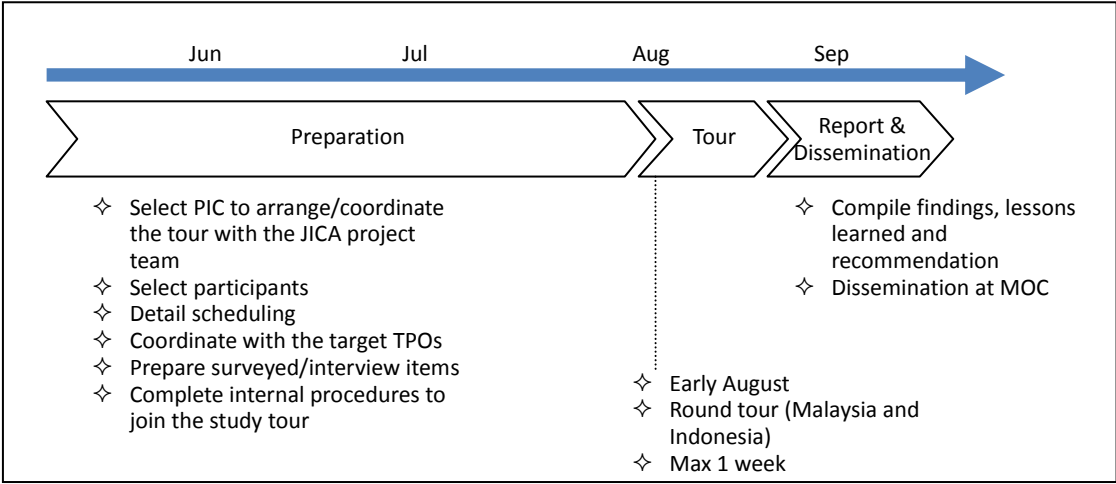


Figure: Steps for the Study Tour

Before starting the Tour, the participants and the JICA Project Team conducted the following activities.

- i) Preliminary study of each organization through the Progress Report of the JICA project (ch.9: benchmarking of TPOs in Asian countries) and respective websites
- ii) Preparation of interview items for each organization
- iii) Preliminary meeting with the Team Leader of the Project on 8th August at Yangon: output of above i) preliminary study of each organization and 2) interview items were reviewed by the Team Leader and the participants together in the meeting.

In addition to these preliminary works in Myanmar, the first day of the Tour, the JICA Project Team held an orientation meeting to reconfirm the study plan, the target of each visit and detailed schedule in Malaysia.

(2) Implementation, Wrap-up and Dissemination

The Study Tour was conducted as scheduled from 9th August 2015 with planned participants. Some of the participants got rigid at the meetings since they were not used to have such opportunities especially the first few days. The JICA Project Team facilitated the meetings with each organization and kept motivating the participants to learn from the opportunities (please refer the evaluation by the Team Leader at the section VI in this report).

After the Tour, the participants compiled the fact findings and lessons learned as a team. They participated in the training held at Nay Pyi Taw on 27th August 2015 for a session “Lessons from ASEAN Study Tour” and disseminated the output of the Tour.

III. Visiting Records

During the study tour, the participants visited eight organizations and had discussions. The outline of the meeting with each organization is summarized in the following tables.

(1) Malaysia

1) MATRADE

Item	Contents
Name of Institution	MATRADE
Date/Time	9:00 – 16:00, Tue 11 August 2015
Venue	Malaysia Export & Exhibition Centre, Menara MATRADE
Interviewees	<p>CEO: Dato' Dzulkifli Mahmud (Courtesy call)</p> <p>Trade and Services Promotion Division: Mr. Raja Badrulnizam (Director), Mr. Har Man Ahmad (Senior Manager), Mr. Nurhasyima Hassan (Assistant Manager)</p> <p>Exporters Development Division: Ms. Razida Hnim Abdul Razak (Deputy Director)</p> <p>Management Services Division: Ms. Anisah Ali (Senior Manager), Ms. Noor Asiah Mahmud (Assistant Manager)</p> <p>Strategic Planning Division: Ms. Aureen Jean Nonis (Director), Ms. Marina Yusof (Manager)</p>
Major Findings	<ul style="list-style-type: none"> ➤ MATRADE was established in 1993 under Ministry of International Trade and Industry (MITI) after the Malaysia External Trade Corporation Act was enacted in 1992. ➤ The economy of Malaysia was based on the agriculture sector and the resource-based sector in the past, currently the economy is developing and growing by advanced technology products, knowledge-based products, and heavy machinery and services. ➤ Export promotion is the driving force of Malaysian economy. ➤ The services of MATRADE consist of exporters development, export promotion, trade & market information and trade advisory & support. ➤ The major export promotion activities are incoming buying missions, trade investment missions, specialized marketing missions, market entry missions, promotion booth at trade fairs, special projects, international trade exhibitions and conferences and joint trade promotion. MATRDE stressed the importance of strategic collaboration with the related-ministries, government organization and the private sector for export promotion. ➤ In 2015, MATRADE plan to participate in 116 trade exhibitions, of which 54 are for products and 53 are for services. Totally 75 exhibitions (65%) are in Asian countries. ➤ Every year, MATRADE holds the International Trade Malaysia at the MATRADE's building. In 2014, 322 companies, of which 60 are foreign companies, participated ➤ The purpose of two Export Promotion Divisions in MATRADE is to

	<p>provide trade promotion services to the Malaysia’s exporters. The division mainly provides activities such as exporters development, export promotion, trade-related information dissemination, trade consultation. The organization of Trade and Services Promotion Divisions is by product/service. The staff is in charge of specific product/service and, at the same time, he/she is also in charge of specific region/countries (“product” first and “market” second).</p> <ul style="list-style-type: none"> ➤ For the exporter development, the division provides the following programmes; supporting export promotion, arranging e-trade programme, arranging trade center, enhancing new exporters programme, enhancing medium size exporter programme (Mid-tier Companies Development Programme) and arranging access to finance. ➤ For the trade and market information, Business Information Centre (BIC) in MATRADE provides annual reports and other publications, conducts data collection on trade data/statistics, market update and market trends, trade related laws, rules and regulations, provides international tender information, etc. The overseas offices conduct market research (each office conducts 6 studies every year). ➤ BIC also offers an online consultancy services, trade advisory and support services as the Help Desk for the private sector. Furthermore, BIC provides the Export Readiness Assessment (MERA) for exporters which categorizes exporters into three groups; new exporters, medium exporters and advanced exporters to offer appropriate services for each SMEs. ➤ On the second floor, there is the Malaysia Export Exhibition Centre (MECC), permanent display of Malaysia’s export products and services from over 500 Malaysian companies covering 30 industries. ➤ MATRADE has 34 branch offices and 9 marketing offices in the world. These offices support the country to expand export market and attract more FDI. ➤ In the country, MATRADE has 5 regional offices and 2 business information centres. These offices are operated with the limited number of personnel (4-5 staff/offices). The duties and responsibilities of the offices are to communicate and support the small and medium enterprises and to promote export development by providing services of trade-related information, services and communications. ➤ MATRADE has acquired ISO 9008 to improve their management. ➤ The staff of MATRDE is usually rotated every 3 years. The staff is evaluated from the aspects of leadership, personal skill, technical skill and managerial skill. MATRADE considers that training is very important and has prepared several training courses.
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2) SME Corporation (SME Corp.)

Item	Contents
Name of Institution	SME Corp.
Date/Time	15:00 – 16:00, Mon 10 August 2015
Venue	Alamanda meeting room, SME Corp.
Interviewees	Mr. Czarif Chai Abdullah (Deputy Director, International Cooperation Secretariat) Mr. Mohd Bin Atan (Deputy Director Economic & Policy Planning Division)

	Mr. Roshaidi Rosli (Senior Manager, Business Development Division)
Major Findings	<ul style="list-style-type: none"> ➤ SME Corp. was established in 2009 by transforming SMIDEC to be a single dedicated agency covering overall policies, strategies for SMEs (not only industries). SME Corp. , which is under MITI, coordinates programmes across all related ministries and agencies. ➤ SME Corp. provides mainly five categorized services; consultation service, capacity building, technology and market, access to finance, and innovation and technology. ➤ SME Corp. has the score rating system, “SCORE: SME Competitiveness Rating for Enhancement”, to classify supported SMEs whether it is eligible to be an exporter. The SCORE is a diagnostic tool with following criteria; business performance, financial capability, technical capability, management capability, production capacity, quality system, and innovation. Total 64 business counselors conduct SCORE rating of SMEs. ➤ Interesting facilities of SME Corp. are SME One Stop Matching Room, SME Resource Sector (library), SME University, SME Expert Advisory Panel, One Referral Center, and Business Advisory Centre. ➤ “SME @ University Programme” is also an interesting service by SME Corp. It contributes to business development and enhancing business insight for SMEs by providing short-term and long-term training programs. The programme also provides Bachelor Degree. ➤ SME Corp. collaborates with MATRADE for “Going Export Programme.” SME Corp. recommends SMEs of 3 star level or above of SCORE to MATRADE.

3) National Chamber of Commerce and Industry of Malaysia (NCCIM)

Item	Contents
Name of Institution	NCCIM
Date/Time	9:00 – 10:00, Mon 10 August 2015
Venue	Meeting room at NCCIM, Menara MATRADE
Interviewees	Amb. Syed Hussien Al Habshee (Secretary General)
Major Findings	<ul style="list-style-type: none"> ➤ NCCIM was established in 1962 to represent the interests of the Malaysian business community on the domestic and international fronts. ➤ The member associations of NCCIM are the Malay Chamber of Commerce Malaysia, the Associated Chinese Chambers of Commerce and Industry of Malaysia, the Malaysian Associated Indian Chambers of Commerce and Industry of Malaysia, the Malaysian International Chamber of Commerce and Industry and the Federation of Malaysian Manufacturers. ➤ NCCIM promotes Malaysian export products in collaboration with MITI and MATRADE. NCCIM dispatches trade missions and receives trade delegations. The Chinese CCI takes responsibility of missions to China, the Malay CCI for missions to the Middle East, and the Indian CCI for the South Asia. ➤ NCCIM also promotes local and international business of Malaysia, foreign direct investments and doing business in Malaysia. ➤ NCCIM provides trade promotion services and providing grants/loans to SMEs in Malaysia. ➤ NCCIM promoting not only SMEs but also micro enterprises to attain

	<p>better development.</p> <ul style="list-style-type: none"> ➤ NCCIM work together for SME development with relevant ministries and agencies.
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4) JETRO Malaysia Office

Item	Contents
Name of Institution	JETRO Malaysia Office
Date/Time	10:00 – 12:00, Mon 12 August 2015
Venue	Meeting room at JETRO Malaysia Office
Interviewees	Ms. Seiko Sekine, the Deputy Managing Director, JETRO Malaysia Office
Major Findings	<ul style="list-style-type: none"> ➤ There are 8 Japanese staff and 11 local staff (including 3 drivers). Among the Japanese staff, 4 staff are dispatched from outside organizations such as METI, local government and local bank. ➤ JETRO Malaysia Office mainly conducts research and projects. ➤ Market research covering obstacles, export and import laws, rules and regulations, investment potentials, and business reviews in the country are prepared articles for JETRO's periodicals (JETRO <i>Tusho Koho</i> and JETRO Sensor). ➤ JETRO's website provides research reports, consultation to SMEs. Market research puts emphasis on legal aspects. ➤ JETRO Malaysia Office provides such market research report with limited number of personnel (4 or 5 person). ➤ The projects are the participation in exhibitions in Malaysia, business matching, delegations from Japan and buyer mission from Malaysia to Japan. JETRO KL Office provides support to export of Japanese products, for example, Japanese food & agriculture products, machinery, environmental equipment, medical equipment and designed kitchenware. ➤ JETRO participates in INATRADE every year and invite Japanese companies to JETRO's booth. ➤ The Business library in the JETRO Office is also operated by this limited number of personnel. ➤ JETRO KL Office with JACTIM has a dialogue with MITI every year regarding business environment for Japanese companies.

(2) Indonesia

1) Directorate General of National Export Development (DGNED)

Item	Contents
Name of Institution	DGNED
Date/Time	10:00 – 12:00, Mon 12 August 2015
Venue	Meeting room at DGNED
Interviewees	<p>Mr. Indrasari Wisnu Wardhanaa, (Secretary)</p> <p>Mr. Ari Satria (Director, Directorate of Market Development and Export Information)</p> <p>Ms. R.A. Marlina (Sub-directorate Head, Directorate of Market Development and Export Information)</p> <p>Ms. Zakiah Hanim (Sub-directorate Head, Directorate of Trade Promotion and Branding)</p>

	Ms. Riana Setia Sari (Section Head, Directorate of Export Product Development)
Major Findings	<ul style="list-style-type: none"> ➤ DGNED is one of the directorates general in Ministry of Trade, Indonesia. Major tasks of DGNED is export promotion through formulating trade policies and strategies, providing international market information, organizing export promotion activities, and developing products of export quality. ➤ DGNED consists of Secretariat, five directorates and the Indonesia Export Training Center (IETC). ➤ The current target of export promotion is non-traditional markets where Indonesia has little share. ➤ For market information, DGNED conducts market data/information collection and dissemination, provides inquiry services and publications. ➤ There are 44 overseas representatives and they produce 38 market intelligence (MARTEL) and 479 market briefs. The Directorate of Market Development and Export Information also produces 12 Martel reports and 12 market briefs every year. ➤ The number of exporters in database is 1,775 and that of importers is 1,449 as of August 2015. ➤ DGNED operates the Customer Service Center (CSC) with the permanent display of SMEs products. The services of CSC include consultation, inquiry, business matching, and buyer assistance. In 2014, the number of visitors to CSC was 286 (domestic: 216 and overseas: 70). The number of inquires was 312 (domestic: 115 and overseas 197). ➤ The online Membership Services is to communicate smoothly with exporters and importers. The number of registered members is 2,253 as of July 2015. ➤ DGNED also provides export product development for SMEs. SMEs can receive a consultancy service to improve their production process, design and market penetration. ➤ There are 19 overseas offices, so called Indonesian Trade Promotion Center (ITPC). ITPC collects trade information at stationed countries and disseminates to the local exporters. DGNED explained that they try to manage ITPCs effectively because their budget is less than MATRADE and Thailand. ➤ DGNED dispatches high-level trade missions (Minister level) and ordinary-level missions (director level). The priority of trade missions is new market development such as Jordan and Bulgaria. Both large-size enterprises and SMEs participate in DGNED's trade missions. DGNED provide subsidies (one-way ticket) to SMEs and sometimes covers a cost of sample shipping. ➤ Trade Expo is the largest domestic trade fair which DGNED implements. Last year, the sales amount was US\$63 million. Buyers came from China, Mongolia, Germany, etc. ➤ DGNED plans to set up Indonesia Distribution Center which lends space and facilities to Indonesian exporters and supports marketing. ➤ As for product development, DGNED has developed designer database with the information of more than 100 designers and the data are available on the website.

	<ul style="list-style-type: none"> ➤ DGNED plans to optimize the Design Facilitation Service (DFS), for example, design clinic. DGNED plans to set up the Jakarta Regional Design Center at the location of IETC. This center provides three types of services: activities with Government budget, business matching and collaboration with universities. ➤ DGNED supports SMEs' adaptation of their products in accordance with market trends, and provides a cost of Intellectual Property Right, and brand development. ➤ DGNED receive the assistance from Germany, SIPPO (Swiss), Canada Trade Facilitation, CBI (Netherland), and JICA/JETRO. ➤ DGNED is a member of inter-ministerial team, Export and Investment Development Team. The team periodically discuss on how to solve the problems of export and investment.
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2) Indonesia Export Training Center (IETC)

Item	Contents
Name of Institution	IETC
Date/Time	10:00 – 11:30, Fri 14 August 2015
Venue	Meeting room at IETC
Interviewees	Mr. Simon Zelotes (Director of Indonesian Export Training Center)
Major Findings	<ul style="list-style-type: none"> ➤ IETC started its training courses since 1989 with JICA's cooperation. ➤ SMEs in Indonesia have insufficient knowledge necessary for exports. IETC has long experience to answer those needs. IETC visits all provinces to promote its programs. ➤ The Director mentioned that it was his pleasure to collaborate with TTI following Laos. Two instructors, Ms. Retno and Ms. Santi, who instructed TTI in 201 explained their experience with TTI. ➤ The major activities of IETC are training, education, alumni, and coaching. ➤ Currently IETC provides regular education courses for 2 months and short-term training for 3 to 7 days. ➤ The ratio of training courses at provinces is increasing. IETC has conducted the training needs analysis and identified there is bigger needs for trade training. The next year's catch phrase is "Go to Province." ➤ IETC also offers a coaching program which supports potential SMEs to be able to export their products with hands on trainings. The training arranges a mobile training and workshops in regions. The coaching program was started with the assistance from Canada and has been continuously modified by IETC. The number of participants for each one-year coaching program is around 20 persons. The sectors of participants are various such as furniture and handicrafts. At the final stage of coaching, business matching is conducted as Trade Expo. The major problems of SME exporters are financing, information and knowledge of business. ➤ The trainers are government officers, university professors, exporters, professional experts, Customs, etc. There is the standard of trainer fees per one session (45 minutes). ➤ Around 40% of IETC operation cost is covered by training fees from

	<p>participants.</p> <ul style="list-style-type: none"> ➤ The Jakarta Regional Design Center will be under the Directorate of Export Product Development, not IETC.
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3) Indonesia Chamber of Commerce and Industry (KADIN Indonesia)

Item	Contents
Name of Institution	KADIN Indonesia
Date/Time	16:00 – 17:00, Fri 14 August 2015
Venue	Meeting room at KADIN Indonesia
Interviewees	Mr. Juan Gondokusumo (Chairman of the Indonesia - CLMV Economic Cooperation Committee)
Major Findings	<ul style="list-style-type: none"> ➤ There are 33 regional Chambers and 440 district branches in Indonesia. ➤ KADIN provides coordination and implementation of supporting programs for the member companies for trade-related business. ➤ KADIN also contributes business negotiation and solution among international business. ➤ KADIN has a special team for export promotion and collaborate with Ministry of Trade/DGNED. ➤ KADIN has the Business Support Desk which support Indonesian companies for all aspects of business. ➤ Under KADIN, the Indonesia - CLMV Economic Cooperation Committee is established. The committee works in order to promote businesses between Indonesia and CLMV. The committee review business regulations of both sides and tries to improve business regulations by trial and error. The committee also considers the cooperation for exports to the developed countries. ➤ KADIN promotes Myanmar companies to participate in Trade Expo. ➤ The chairman pointed out that the transportation is a bottleneck for trade between Indonesia and Myanmar. An Indonesian exporter of salon must send the goods via Singapore. ➤ The Chairman said that education and tourism are potential areas for joint business between Indonesia and Myanmar. In Yangon, there is the Indonesian International School Yangon (IISY) which has elementary school course and high school course. Indonesia's teaching methods has an opportunity in Myanmar. A tourism package of relics in Indonesia, Myanmar and Cambodia is interesting.

4) JETRO Indonesia Office

Item	Contents
Name of Institution	JETRO Indonesia Office
Date/Time	14:00 – 15:00, Fri 14 August 2015
Venue	Meeting room and business library at JETRO Jakarta Office
Interviewees	Mr. Mitsutoshi Okabe, the Vice-president Director, JETRO Indonesia Office
Major Findings	<ul style="list-style-type: none"> ➤ JETRO Indonesia operates with 23 personnel including 15 local staff. ➤ The organization of JETRO Jakarta consists of the general affairs department, research department and project department. ➤ The research department collects data/information and compiles reports of Indonesian market to Japanese companies.

	<ul style="list-style-type: none"> ➤ The task of JETRO Jakarta is to support Japanese companies operating in Indonesia and coming to Indonesia. The investment of Japanese companies has expanded since 2008. The research department provides recent information to those Japanese companies. Japanese companies, especially SMEs, need information about labor issues, tax and regulation change. ➤ JETRO Jakarta sometimes holds seminars in order to provide recent and useful information to Japanese companies by inviting government officials as lecturers. ➤ The research department searches candidates of Indonesian business partner at the inquiries from Japanese companies. ➤ The project department participates in international trade fairs and exhibitions, inviting Japanese companies. At the Manufacturing Indonesia in December, JETRO will have a booth for Japanese companies. They also support trade missions of Indonesian buyers and arranges a business matching. ➤ When the JETRO president Mr. Ishige and Indonesia President Mr. Joko Widodo met in March 2015, the MOU on JETRO's cooperation plan package between JETRO and MOT/BKPM was signed. Under the five-year cooperation plan, JETRO will send experts of textile, food, mould& die, etc to support new exports to Japan by improving the quality of Indonesian products to meet Japan market to export the product to Japan. ➤ JETRO Jakarta supports the One-Village-One-Produce (OVOP) program in Indonesia. JETRO Jakarta plans to dispatch 3 experts to the priority three sectors, food, textile and handicraft. The final target of OVOP is export to Japan. ➤ JETRO Indonesia operates business library, as well as JETRO Malaysia.
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Photos



MATRADE



MATRADE



NCCIM



SME Corp.



JETRO, Malaysia



CSC (DGNE)



CSC (DGNE)



IETC

IV. Lesson Learned and Recommendations from the Study Tour

(1) Enrichment of Support Measures for SMEs

It is necessary for MOC to provide comprehensive and systematic supports for SMEs on trade promotion. In the cases of Malaysia and Indonesia, SMEs are able to receive a wide range of support for trade promotion, for example, in the areas of business management, marketing, design development, packaging, trade mission, trade fair, etc. These support menus could be provided by MOC collaborating with related Ministries and the private sector, such as UMFCCL.

The case studies of MATRADE and DGNED offer good reference for the improvement of trade promotion activities of MOC. They publishes a variety of publications in English which introduce their export products to overseas buyers, put an emphasis on displays of local products, and provide support by type of exporter (beginner, intermediate and advanced).

It is also important to provide financial support to SMEs to expand their business in the international market to encourage them to start new business or expand their business abroad. In Malaysia and Indonesia, TPOs provide a variety of financial support to meet SMEs' needs on trade promotion. These financial supports foster SMEs to be exporters and contribute to export development for the country.

(2) Establishment of Trade Support Offices

To establish trade promotion offices abroad as the overseas basis would be significantly useful to enhance trade promotion activities for Myanmar. MATRADE, DGNED and JETRO make use of their overseas offices to collect market information in each country, grasp business issues which SMEs face on export, conduct promotion activities such as trade fairs and exhibitions, coordinate business matching, and so on. For example, those overseas offices regularly make market reports of relevant countries for domestic exporters.

It would also be urgently required for Myanmar to implement capacity development of the commercial attaché as a representative of Myanmar on trade promotion and increase the number of the commercial attaché in the world.

At the same time, it is necessary to establish domestic support offices as a window for SMEs to get information and supports on trade promotion. In the cases of the One Referral Centre and the Business Advisory Centre (SME Corp. Malaysia), the Business Information Desk (MATRADE), and the Customer Support Center (DGNED), SMEs are able to get trade-related information and advisory/consultation to start or expand export. MTC aims to provide such function in Myanmar, however, it is necessary to develop MTC's capacity to be a window of trade promotion for SMEs as the centers in Malaysia and Indonesia.

(3) Strengthening Trainings for SMEs

It is essential to provide a variety of trainings for SMEs on trade promotion which meet their needs. To

realize such user-oriented trainings, it is necessary to assess the needs of SMEs by making a diagnosis of SMEs in Myanmar before providing uniformed trainings as MATRADE applies. MATRADE provides special training programs by type of (potential) exporters.

A coaching training which supports SMEs from the beginning of export until marketing promotion as a sequence of trade promotion would be a useful measure for the export training. The mobile training which offers training opportunities in regions would be effective in Myanmar so that more SMEs can take opportunities on export trainings.

(4) Recommendation for a new TPO

The establishment of a new TPO in Myanmar is proposed in NES. The new organization should put efforts into capacity development of both organization and human resources. Especially strengthening of human resource management is required as the first action to be a TPO like MATRADE, DGNED and JETRO.

V. Evaluation by Team Leader (Mr. Mishima)

(1) Planning & Preparation

a. Selection of the target countries and organizations

JICA Project Team selected the target countries and organization. The case of Malaysia offered a lesson of export promotion of one of the most industrialized countries among the ASEAN countries. MATRADE is an independent statutory body which extends a full-fledged trade promotion services. The export product structure of Indonesia is basically resource-based and labor-intensive manufactured products and the case of Indonesia gave reference information on how to catches up. DGNED is one directorate general under the Ministry of Trade and showed a case of a trade promotion organization (TPO) as one unit of a ministry.

From the above point of view, the selection of countries and organizations appropriate.

b. Selection of participants

The Deputy Director General of the Department of Trade Promotion and Consumers Affairs (DTPCA) selected the participants based on the criteria prepared by JICA Project Team. The selection of participants was appropriate. All the participants are higher level officers because they are the deputy director general and directors. They are chosen from the relevant divisions of DTPCA. The head of Myanmar Trade Center was also chosen.

c. Arrangement of meetings

DTPCA sent request letters to the organizations to visit approximately one month before. JICA Project

Team must follow up the appointment with the organizations after the letters of DTPCA. This was because the person in charge (director) of DTPCA went abroad and could not make necessary correspondence with the organizations. JICA Project Team should have asked MOC to clearly appoint persons in charge of communication with the organizations to visit and monitored the progress of arrangements of appointments.

d. Preparation by Participants

JICA Project Team provided the participants beforehand reference information about the organizations to visit and asked them to prepare. JPT organized a preparation meeting on the day before departure. This was because: i) JICA experts were out of the country due to the assignment schedule; ii) the participants separately work in Nay Pyi Taw, Yangon, and Mandalay; and iii) some of the participants went abroad for an exhibition. It would have been better if two or three preparation meetings had been opened for deeper understanding about the Study Tour among the participants.

(2) Implementation

a. Arrangement of meetings

The participants could visit the organizations as scheduled. Only one exception was the visit to DGNED. The trade minister was just replaced on the day before our visit and the new minister first came to the ministry on the day of our visit. As a result, the time of meeting with DGNED was only in the morning. Instead, the participants visited the pavilion of SMESCO in the afternoon on that day.

SME Corp and MATRADE in Malaysia and DGNED and IETC in Indonesia had prepared for the meeting with presentation slides and brochures. The persons in charge of those organizations kindly took care of the participants.

b. Attitude of participants

Protocols: Generally speaking, the participants seemed inexperienced at protocols of formal visits to organizations abroad. As the participants did not make proper self-introduction and address of their gratitude, the JICA expert should teach them meeting procedures. At last, they made minimum protocols.

Manner: Basically the participants tried to mind their manner. But they sometimes showed a lack of good manner. For example, the JICA expert should warn some of the participants because they chewed gum during the meetings. Some participants sometimes looked around restlessly at the meetings. When the participants listened to an explanation by a guide at a worksite such as a library or a service center, some of them got out of the group and wandered around by themselves.

c. Participation to discussions

Generally speaking, the participants were calm at the meetings. They listened to the presentation by

each organization with keen interest and took notes. However, they made very few questions after the presentation. The most of their questions were supplementary and were not based on their awareness of problems.

The JICA expert tried to raise their awareness about issues by briefing the outline and major issues of organizations beforehand and suggesting anticipated questions. But it was difficult to realize constructive and interactive discussions between the participants and the organizations.

The followings are considered as the reasons for inactive questions:

- i) The English capability of the participants was not sufficient to make in-depth discussions on the issues. Especially, the English capability of the Mission Leader seemed insufficient.
- ii) The understanding of the participants about trade promotion service seemed still superficial and their level of awareness of the problems was not high enough. This is because many of trade promotion services explained were quite new to them and they have little experience. One of exceptions is that one participant asked a way of collecting books free of charge at the library of JETRO Malaysia Office. She asked this question because she daily faces with this problem

(3) Results

Through the ASEAN Study Tour, the participants could learn the followings:

- i) The participants could get a general idea of what a TPO is.

The participants had recognized the importance of MOC enhancing trade promotion activities for Myanmar export before the ASEAN Study Tour. But they had little knowledge about TPOs. By visiting MATRADE and DGNEP, they could learn what a TPO is and what a TPO does. For example, they learned about the history, organization, management, and service menus for trade promotion services of those organizations. They also learned the importance of overseas branches for trade promotion by visiting JETRO offices. This experience would be useful when they plan to develop their own TPO.

- ii) The participants could learn best practices of export promotion.

The organizations such as SME Corp. and MATRADE in Malaysia and DGNEP in Indonesia introduced their programs for export promotion and SME development in terms of purpose, targets, activities, etc. The information of those programs would be good reference when they enhance their services and plan new programs.

- iii) The participants could see actual service provision by visiting the sites.

The participants visited the sites where the organizations actually provide services and understood how the services are actually provided. For example, they visited the service centers, displays and libraries. They took many photos of the facilities of these sites for reference. MOC currently plans to

introduce and improvement such facilities as database (e-library), library, and displays at the trade promotion centers. The on-the-spot visits would give them good reference for the improvement.

iv) The participants could learn about SME development.

The participants had an interest in SME development and One-Village-One-Product programs as well as trade promotion programs. Especially they were interested in a business counselor program which conducts the scoring of SMEs and provides assistance through business counselors.

(4) Necessary Actions to Be Taken

i) The ASEAN Study Tour this time is just the first step of capacity development of trade promotion.

The participants should recognize that what they learned and observed is only general knowledge about trade promotion services of other TPOs (MATRADE and DGNED). As the first step, the participants should precisely examine what they learned and extract lessons in order to make proposals for the improvement of their trade promotion.

ii) The participants should make use of their experience for future capacity development of trade promotion.

The participants presented the results of ASEAN Study Tour at the Training for Officers on August 27 in Nay Pyi Taw. They have also prepared the report and will submit to the top management of MOC. But one report is not enough in order to share the lessons with other members of MOC. The participants should actively transfer their knowledge by proposing new ideas for trade promotion, reflecting lessons in trade promotion plans, and teaching officers and staff.

iii) The ASEAN Study Tour should be the starting point of collaboration with other TPOs.

MOC soon advances to a step at which MOC must learn programs and methods of other TPOs in detail in order to actually design new programs and implement them effectively. It is necessary to use this opportunity of ASEAN Study Tour to start the cooperation with the organizations visited.

iv) MOC should plan and conduct a benchmarking study as necessity requires.

A benchmarking study is an effective method of learning best practices in the area of trade promotion. The participants learned the importance of benchmarking study and how to learn best practices of other countries. MOC should conduct a benchmarking study when needed to get a clue to solve a problem.

