

Appendix 8:

Roadmap for Trade Promotion

Roadmap for Trade Promotion of Myanmar

February 2018

Myanmar Trade Promotion Organization: MYANTRADE

Union Ministry of Commerce

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Chapter 1 Mission and Role of Myantrade

1.1 Establishment of Myantrade

On April 1, 2016, the Union Ministry of Commerce (MOC) established Myanmar's trade promotion organization (TPO), the Myanmar Trade Promotion Organization (Myantrade) by reorganizing the Department of Trade Promotion and Consumers Affairs.

The purpose of establishment was to enhance Myanmar's trade promotion policy implementation. At the establishment, MOC had consulted recommendations by international organizations regarding models of organization, management and services for trade promotion.

The Japan International Cooperation Agency (JICA) conducted the Project for Capacity Development of Trade Promotion in Myanmar Phase II during the period from March 2015 until January 2016. The Project formulated the Roadmap for Trade promotion that included the plans of organization development, service enhancement and capacity development for trade promotion.

The Korea International Cooperation Agency (KOICA) implemented the Project on Trade and Investment Policy Consultation and Establishment of TPO in Myanmar during the period from May 2015 until June 2016. The Project made recommendations for the organization design and legislation for the establishment of trade promotion organization (TPO).

1.2 Vision, Mission and Objectives of Myantrade

The vision, mission and objectives of Myantrade are as explained below:

Vision

Positioning Myanmar as a regionally competitive trading nation to attain export-led development strategy through promoting Myanmar's enterprises

Mission

- Promote Myanmar's trade and exports to enable local companies to compete effectively in the regional and global markets
- Focus the branding of 'Made- in-Myanmar' of goods and services

Objectives

- 1) Raise profile of Myanmar exporters in international markets
- 2) Disseminate timely and relevant information and market research data to help Myanmar companies gain competitive edge in international markets
- 3) Introduce Myanmar companies to foreign buyers
- 4) Promote export of Myanmar goods and services in overseas markets

1.3 Organization of Myantrade

The organization structure of Myantrade is as shown in the following figure.

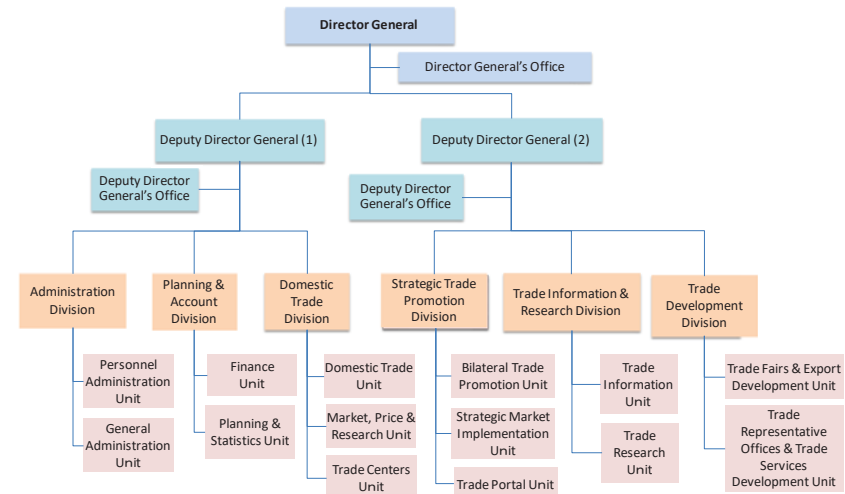


Figure 1-1: Organization Structure of Myantrade

The allocation of personnel to individual divisions is as shown below.

Table 1-1: Human Resource of Myantrade

	Officers	Staff	Total
Director General	1		1
Director General's Office	2	7	9
Sub-total	3	7	10
Deputy Director General (1)	1		
Deputy Director General's Office	1	3	4
Administration Division	15	25	40
Planning and Account Division	15	25	40
Domestic Trade Division	37	93	130
Sub-total	69	146	215
Deputy Director General (2)	1		
Deputy Director General's Office	1	3	4
Strategic Trade Promotion Division	20	20	40
Trade Information and Research Division	15	25	40
Trade Development Division	15	25	40
Sub-total	52	73	125
Total	124	226	350

Note: As of October 2017

The functions of individual divisions are as shown in the following table.

Table 1-2: Functions of Divisions of Myantrade

Administration Division	
Personnel Administration Unit	1 To carry out personnel administration and organization matters
	2 To carry out personnel records and pension matters
	3 To supervise the disciplinary matters, fraud, inspection and welfare of staffs
	4 To manage staff salary and benefits
	5 To design human resources development plan
General Administration Unit	1 To perform security and cleanliness matters, plantation matters according to the guidelines
	2 To carry out the maintenance of buildings, matters relating to motor vehicles, capital and general affairs according to the guidelines
	3 To manage the procurement and supply of stationary and computer related utensils for departmental use
	4 To supervise the maintenance of buildings, housing and hostels
Planning and Finance Division	
Finance Unit	1 To supervise the calculation of basic estimate, additional estimate and revised estimate.
	2 To allocate 3-month quarterly fund according to account units, expenditure heading and check the actual expenses and balance
	3 To examine monthly accounts
	4 To administer the calculation of weekly, monthly, quarterly and annual accounts
	5 To administer calculations of 3-month quarterly budgets for head office's departments
	6 To monitor for payment of bills
	7 To administer the departmental accounts, request for drawing and opening letter of credit
	8 To administer for income and capital
Planning & Statistics Unit	1 To supervise planning and statistics matters
	2 To supervise the designing of the projects on behalf of department, the planning of investment schemes and projects
	3 To supervise detailed planning for implementing projects
	4 To coordinate and negotiate between divisions and external organizations for implementation of the departmental projects
	5 To monitor and record the performance between the Departmental responsibilities and the implementation according to mission
	6 To supervise reporting of the departmental performance monthly, 3-month quarterly, bi-annually and annually
	7 To compile, maintain and report trade statistics
Domestic Trade Division	
Domestic Trade Unit	1 To calculate production, consumption and surplus of six agricultural produce groups and increase exports
	2 To calculate production cost and profit of each process in supply chain mechanism
	3 To cooperate with regions, states and departments for reducing the production costs and services costs to be market competitive
	4 To monitor global supply and demand of crop situation and make recommendations for getting market access of surplus domestic crops
Market, Price and Research Unit	1 To analyze price development and flow of agricultural produce, fish products, consumer goods, construction goods in domestic market daily, weekly and quarterly and support for price stabilization
	2 To make local and international market research
	3 To introduce new export commodities and cooperate with regions and states for trade promotion
	4 To investigate news on supply and demand
Trade Centers Unit	1 To cooperate for the functions of trade centers at regions and states
	2 To contact with trade centers at Yangon and other cities for exchange and dissemination of trade news
	3 To supervise in surveying the possible regional products for market penetration
	4 To supervise for economic and trade services at trade centers
	5 To administer for services of trade centers with the cooperation of private sector
	6 To link Myanmar exporters and foreign buyers to get market

	7 To provide services for sellers and buyers
	8 To educate to become highly competent exporters and SME and to present prizes
	9 To establish centers for dissemination of trade news for business people
Strategic Trade Promotion Division	
Bilateral Trade Promotion Unit	1 To implement bilateral trade agreements
	2 To cooperate with private sector for trade promotion by applying trade agreements
	3 To participate in signing of trade agreements
	4 To organize for mutual visits of delegations from public sector
	5 To cooperate with counterpart business organizations and trade promotion organizations
Strategic Market Implementation Unit	1 To implement for market access and export market
	2 To provide trade supportive measures for facilitation of export/ import procedures
	3 To implement for development of prioritized export commodities
Trade Portal (e-Biz) Unit	1 To launch Myanmar Trade Portal and perform B2B, B2C and e-commerce activities for trade promotion
	2 To make alliance with significant e-commerce website from local and abroad (e.g., Alibaba, Tradeindia)
	3 To take responsibility of departmental ICT applications to be modern and updated
Trade Information and Research Division	
Trade Information Unit	1 To establish complete and extensive information network
	2 To publicize news release on trade and market information
	3 To timely report on irregular commodities and process either by country or by region
	4 To make reports with studies of market potential
	5 To make research on overseas consumer behavior
	6 To relay market information sent from commercial representative offices abroad to private organizations
Trade Research Unit	1 To make research on national economic, trade policies and plans
	2 To report studies on international trade and economic statistics
	3 To make research for the development of trade, economy and management
	4 To make international market research
	5 To attend international trade promotion forums on behalf of department
	6 To present reports on trade situations occasionally
Trade Development Division	
Trade Fairs & Export Development Unit	1 To supervise in holding of local and international trade fairs
	2 To assist for the development of trade by country, by commodity and by company and SME development
	3 To assist in the areas of international quality standards, registration, design, packaging, sanitary and consumer safety
	4 To perform for sustainability of quality and standards of exports
Trade Representative Offices & Trade Services Development Unit	1 To supervise the functions of Myanmar Trade Center (MTC)
	2 To cooperate with Trade representative offices abroad and commercial counselors for penetration of Myanmar exports to foreign markets
	3 To organize the mutual business delegations from private sector
	4 To cooperate with foreign business organizations and trade promotion organizations
	5 To assist exporters in their foreign market penetration
	6 To hold trade related meetings and seminars
	7 To initiate incentive programs for business people for trade development

Chapter 2 Issues for Trade Promotion of Myantrade

There is a gap between Myantrade's situation and the need of the private sector, and a gap between Myantrade's and the best practices of other TPOs.

The issues of gaps can be classified into two categories: management issues and service issues. The management issues are related to the policies for trade promotion and management of Myantrade as the basis of trade promotion service provision. The service issues are specific issues regarding the provision of each trade promotion service.

2.1 Management Issues

2.1.1 Policy Environment

External trade is indispensable for sustainable and balanced economic development. The neighboring ASEAN countries have realized substantial economic development from the take-off stage of economic growth with exports as the driving force of growth.

The major issues of Myanmar's policy environment for export development are as listed below.

- Myanmar's export sector has a wide range of issues for further development.

Currently, Myanmar's exports have the following problems due to the legacy of ineffective policies and regulations and less-developed economic structure:

- i) Most exports of Myanmar cover only a few commodities, that is, natural resources-based products and labor-intensive products (low value-added).
- ii) Technology level of export items is low (low value-added and low competitiveness).
- iii) Physical infrastructure for export logistics has been less developed (low competitiveness).
- iv) Myanmar is proceeding with market liberalization under AEC and faces with tougher competition in the market (severe competition).

- National Export Strategy (NES) is formulated to address the development needs of Myanmar's export, however, the implementation demands the facilitation of many stakeholders.

The major strategies of export development of Myanmar can be summarized into:

- i) Export expansion of existing product items
- ii) Diversification of export markets
- iii) Increase in exports of more value-added products (diversification of export products)
- iv) Develop exports of new product items (diversification of export products).

The objectives and activities of NES have been formulated according to the above understanding and strategies. The National Export Strategy (NES) sets the following strategic objectives:

- i) To foster sustainable and equitable export-led growth and value addition for the socio-economic development of the people of Myanmar.
- ii) To ensure a consistent, predictable and transparent trade policy and regulatory framework.
- iii) To develop competitive, diversified and branded exports by expanding productive capacities and fostering innovation.
- iv) To build modern, enabled and supportive institutions to respond to the diverse needs of current and emerging exporters.
- v) To build up physical infrastructures.

- Myantrade is expected to play the focal point for successful implementation of NES.

Myantrade is positioned to be the key promoter of NES. There are many stakeholders such as various relevant ministries, associations and international organizations are involved in the implementation of NES.

Myantrade should extend leadership and allocate lots of resources (personnel and time) to the coordination of the activities of NES.

- Capabilities of Myantrade as a TPO is still poor compared with other ASEAN countries.

Myantrade is actually the member organization from Myanmar in the Asian Trade Promotion Forum, a gathering of Trade Promotion Organizations (TPOs) in the Asian Region.

However, the presence and performance of Myantrade have a low profile in trade promotion services in Myanmar. Its trade promotion services are weak in terms of size, scope, competency, management and organization. Compared with TPOs in the neighboring ASEAN countries, trade promotion services such as market information, trade fairs, and other promotion services are poorly provided due to insufficient resource and experience, and unorganized institutional setting.

2.1.2 Organization

As for Myantrade's organization for trade promotion, the following problems are pointed out.

- Myantrade needs to develop the institutional capability as a TPO because it is a new organization.

The functions of divisions of Myantrade have been defined. Each division conducts its functions and tasks under the strong leadership and instruction. However, Myantrade still needs to accumulate expertise to function as a TPO at the level of advanced ASEAN countries.

The organization structure also needs adjustment. The organization of MOC is under review by the World Bank. The result of this review may propose necessary adjustment. Myantrade may become a stand-alone TPO with autonomous status when necessary conditions, such as export environment and institutional capability, are ready in the long term

- **The mechanism of collaboration among division to provide trade promotion services to target exporters in an integrated way.**

Priority sectors for export development are shared by all members of Myantrade. However, the coordination among divisions is not yet well-established. Policy guidance for the collaboration among division is necessary to increase the effectiveness of trade promotion of target exporter groups.

- **The business-oriented mindset to provide customer-oriented trade promotion services is weak.**

The objectives and role of trade promotion services is not fully understood for most of members. It is observed that their way of work is often passive. Proper guidance and training for them is necessary to establish proactive attitude of supporting exporters.

- **Trade promotion services in Yangon that is the biggest commercial center are weak.**

The Trade Development Division and the Myanmar Trade Center (MTC) are physically separated. Close communication and clear-cut demarcation among them are needed. For the provision of integrated and effective services at one place, trade promotion services in Yangon should be given emphasis.

- **Trade services centers in regions have been recently started and need to expand its trade promotion activities.**

Myantrade has established regional trade centers with the purpose of starting trade promotion services in regions. Regional trade centers have been established in four regions. However, the base of service provision has not been founded in terms of service development and personnel. One or two officials are dispatched to the regional trade centers and they face with budgetary constraints in extending services.

2.1.3 Resource Allocation

- **The budget for trade promotion is very insufficient to provide full-scale trade promotion services.**

The size of budget for trade promotion is very limited, approximately one tenths of MATRADE of Malaysia and DGNED of Indonesia. After paying salaries, budgets for operation expenses and equipment are small.

2.1.4 Management System

The following issues can be pointed out in the area of management system of Myantrade for trade promotion.

- **It is desirable to enhance activity evaluation system of Myantrade.**

Activities of Myantrade should be evaluated from viewpoints of relevance, impact, cost-effectiveness, etc. It is important to identify constraints of activities and feed back to the next year's annual plan. Performance evaluation is periodically conducted. However, at this moment it is needed to review activities fundamentally to concentrate on priority activities that have significant impact to export

development.

- **Workflows and standard operating procedures of trade promotion services have not been fully formulated for all activities.**

The standard operating procedures (SOPs) have been prepared only for some services, but they are not fully utilized nor shared among unit members. Understanding of officers and staff at the field level about their tasks is uneven. It should be considered to introduce systematic management tools.

- **The job assignment to officers and staff does not match the needs and is not well-balanced.**

As the job descriptions are not fully ready, prerequisite competencies and necessary number of personnel for a unit or a position are not clear. Clear job assignment and proper delegation of authority enables quick and flexible actions avoiding an attitude of waiting instruction.

- **Myantrade needs to have management style which enable to extend services responding flexibly to requirements of the private sector.**

There are best practices of TPOs that have introduced management methods such as key performance indicators and personnel evaluation system to improve quality of trade promotion services. Myantrade is a department of MOC, therefore it follows administration regulations of MOC and it may be difficult to introduce independent management system. However, it is desirable to adopt these methods to possible extent.

- **The diffusion of information technology (IT) is delayed at Myantrade.**

Allocation of personal computer, use of computer application for daily operation, and digital literacy are not at the satisfactory level among personnel of Myantrade.

2.1.5 Human Resource Management

The major issues regarding human resource management (HRM) including human resource development (HRD) are listed below.

- **Resourceful personnel of Myantrade for trade promotion are insufficient in the number.**

The number of personnel of Myantrade is approximately 350 persons. This is a sufficient number considering a development stage as a TPO. However, more resourceful personnel are necessary to support a substantial level of trade promotion services.

- **The age distribution of personnel is unbalanced.**

The age of personnel is advancing at Myantrade. The composition of personnel by age shows that approximately half of personnel are more than 50 years old. New recruitment is not conducted on a regular basis.

- **Myantrade personnel generally have insufficient knowledge and experience to provide quality trade promotion services.**

Trade promotion services of Myantrade have a short history of two years since 2016. Myantrade personnel have received insufficient training for their work. Basic skills such as English are insufficient. Only few can use sufficient level of English for export promotion activities. Intensive training is needed for MOC personnel when enhancing trade promotion by MOC.

- **HRM tools for capacity development have not been introduced.**

Myantrade personnel are managed according to the rules and regulations which regulates civil servants. However, HRM tools which are commonly used by private enterprises for capacity development, such as management by objectives, are not currently adopted.

- **The HRD system of Myantrade is very poor because it is not systematic and well-planned.**

Myantrade's training programs are currently provided on an ad-hoc basis. Myantrade does not have HRD system based on personnel evaluation and individual career development plan, which discourages the motivation of individuals and workplace.

2.1.6 Possible Measures for Management Issues of Myantrade

The following measures can be considered for the issues of management of Myantrade.

Table 2-1: Summary of Management Issues and Possible Measures

Issues	Required Measures
Policy <ul style="list-style-type: none"> - Myanmar's export sector has a wide range of issues for further development. - National Export Strategy (NES) is formulated to address the development needs of Myanmar's export, however, the implementation demands the facilitation of many stakeholders. - Myantrade is expected to play the focal point for successful implementation of NES. - Capabilities of Myantrade as a TPO is still poor compared with other ASEAN countries. 	<ul style="list-style-type: none"> - Enhance the capability of Myantrade as the focal point of the implementation of NES. - Place a policy priority on the capacity development of Myantrade for trade promotion to create a truly competent TPO in Myanmar
Organization <ul style="list-style-type: none"> - Myantrade needs to develop the institutional capability as a TPO because it is a new organization. - The mechanism of collaboration among division to provide trade promotion services to target exporters in an integrated way. - The business-oriented mindset to provide customer-oriented trade promotion services is weak. - Trade promotion services in Yangon that is the biggest commercial center are weak. 	<ul style="list-style-type: none"> - Enhance an organization so that Myantrade can effectively provide integrated trade promotion services - Modify the organization structure by reviewing the optimal structure for Myantrade's services - Realize simple, flexible and smooth operation and avoid the complexity of line of reporting - Create business-oriented mind-set and work culture among the personnel - Move more trade promotion function in Nay Pyi Taw to Yangon - Establish good work collaboration network among MTC and regional trade centers by

	reviewing the scope of MTC and regional trade centers - Become a stand-alone TPO which has an autonomous status in the long term
Resource Allocation <ul style="list-style-type: none"> - The budget for trade promotion is very insufficient to provide full-scale trade promotion services. 	<ul style="list-style-type: none"> - Establish budgeting mechanism of budgeting for trade promotion programs & activities - Search for possible source of funds - Increase own revenue from fee-based services
Management <ul style="list-style-type: none"> - It is desirable to enhance activity evaluation system of Myantrade. - Myantrade needs to have management style which enable to extend services responding flexibly to requirements of the private sector. - Workflows and standard operating procedures of trade promotion services have not been fully formulated for all activities. - The job assignment to officers and staff does not match the needs and is not well-balanced. - The diffusion of information technology (IT) is delayed at Myantrade. 	<ul style="list-style-type: none"> - Establish a strong planning function and an administration function - Learn the best practices of other TPOs and design new services - Establish workflows and procedures of trade promotion services - Clarify the line of command and job assignment - Introduce management methods which are effective for management improvement - Develop information system of Myantrade
Human Resource Management <ul style="list-style-type: none"> - Resourceful personnel of Myantrade for trade promotion are insufficient in the number. - The age distribution of personnel is unbalanced. - Myantrade personnel generally have insufficient knowledge and experience to provide quality trade promotion services. - HRM tools for capacity development have not been introduced. - The HRD system of Myantrade is very poor because it is not systematic and well-planned. 	<ul style="list-style-type: none"> - Conduct total human resource management which interlinks job assignment, personnel evaluation, career path and human resource development (HRD) - Realize job rotation for the right person in the right place - Develop capable personnel who can be core members for trade promotion - Formulate and implement comprehensive human resource development plan - Make use of sources of capacity development such as Trade Training Institute (TTI) and technical assistance of internal organizations

2.2 Trade Promotion Service Issues of Myantrade

2.2.1 Trade Information

There are the following issues for trade information service of Myantrade.

- **The contents of export information provided are very limited.**

Most of trade information collected by Myantrade is information about domestic trade such as price and traded volume of basic commodities. Information on overseas markets collected by Myantrade is

only short reports on price trends of commodities prepared by commercial attachés although exporters' needs are overseas market information such as standards and regulations.

- **The capability of market information collection and analysis is weak.**

The trade information and research Division is in charge of collection, analysis and dissemination of international trade information. However, the scope of tasks of the division is still narrow. The market analysis capability of the division is weak and capacity development is needed.

- **Myantrade does not effectively utilize database for trade promotion.**

The major database used by Myantrade are the international trade statistics of International Trade Centre and exporter license database. Exporters' needs for data of overseas market information are high but they are not provided. Information of exporters is limited data which were occasionally collected. Myantrade has not accumulated information of exporters' profile that are important for matching service and identifying target exporters for trade promotion.

- **The information on the websites of Myantrade is mostly in Burmese.**

The websites of MOC/Myantrade provide information such as news and events of MOC/Myantrade, commodity price trends, news of domestic trade and so on mostly in Burmese. Foreign business people cannot reach the information in the websites. On the website of Myantrade, exporters' information with photos of their products are uploaded. However, the number of exporters is limited, and information are outdated.

2.2.2 Publication

There are the following issues regarding publication for trade promotion.

- **There is limited variety of periodical publications for trade promotion.**

The regular publication of Myantrade is only "Commerce Journal (weekly)". Myantrade also regularly revises the exporter/importer guide.

- **Most articles of Commercial Journal are written in Burmese.**

Even though the articles of Commercial Journal are very useful for trade business, foreign business people cannot read.

- **Brochures of Myantrade's services and Myanmar products are neither attractive nor periodically updated.**

The variety of brochures is very limited. They are mostly brochures which introduce the Myanmar Trade Center and regional offices. More attractive brochures are needed to be made for the introduction of services and promotion of Myanmar exporters.

- **There is budget constraint for publication.**

Myantrade must face a constraint of budget when they plan a new publication such as directory, brochure, market research report and so on.

- **The publication is not effectively used for the promotion of Myantrade's services.**

Commerce Journal is widely distributed and read by business people. But the publication of MOC is not made used for effective publicity of trade promotion services of Myantrade and promotion of Myanmar products.

2.2.3 Trade Fair

The issues of trade fair of Myantrade are listed below.

- **There are insufficient budgets for participation in overseas trade fairs and for organizing national-level trade fairs.**

Myantrade participates in only overseas trade fairs which overseas organizers provide supports to Myantrade. The opportunity of those trade fairs needs to be utilized more effectively.

- **Myantrade has not established good trade fair management policy and management tools.**

The formulation of trade fair management policy and development of trade fair management tools are needed for effective trade promotion at trade fairs.

- **Support to Myanmar exhibitors for effective sales promotion is not appropriately provided.**

Myantrade provides paperwork supports to participants of the overseas trade fairs which Myantrade participates such as visa application, transportation arrangement, etc. But support to promotional activity supports such as identification and invitation of prospective buyers, business negotiation, etc. are not sufficiently provided.

- **Trade promotion activities at domestic trade fairs are not active.**

Every year many domestic trade fairs are organized mostly in Yangon. However, Myantrade does not make use of these opportunities for promotion of trade promotion services of Myantrade.

2.2.4 Exporter/Buyer Service (One-stop Window)

The Myanmar Trade Center (MTC) and regional trade centers are one-stop service windows for exporters and foreign buyers. Their functions consist of consultation, business matching, display of Myanmar products, and library.

General

- **The recognition level of MTC among exporters and foreign buyers is low.**

Myantrade promotes MTC by distributing brochure and uploading the page of MTC on Myantrade's website. The recognition level of MTC and its services is low among exporters and foreign buyers.

Because of low recognition level, MTC receives 15 -30 visitors per month. Participants in overseas trade fairs usually visit MTC for export license of sample products and visa application.

- **Facilities and equipment have not been periodically renovated.**

Since the establishment in 2014, MTC has not implemented fundamental renovation. It is desirable to modernize the facilities and display to make MTC more attractive.

- **More networking and collaboration among MTC and regional trade centers.**

In order to expand trade promotion services of regional offices, technical transfer and information transfer from the Central Office and MTC are necessary.

- **Regional trade center is weak in playing a bigger role in exporter development.**

Regional trade centers have been newly established. The number of personnel and their expertise in exporter development are limited.

- **Regional trade centers must cover whole region/state with limited personnel.**

Regional offices have the limited number of officers and staff to cover their wide coverage area. Officers are often transferred from other regions, but they have little knowledge about the characteristics of destination regions.

Consultation

- **The number of personnel who can give hands-on advice is very limited.**

There is practically only one person who can give proper advice against a request of consultation at MTC. At the regional trade centers, a few persons are dispatched, and they provide consultation services. When a person in charge at MTC or regional trade center cannot give appropriate advice, he/she consults with knowledgeable persons in MOC.

- **Visitors who ask for consultation are few.**

The number of visitors to MTC is few. Most topics are recommendation letter for business visa, export/import procedures and how to export.

- **Useful data and information for consultation service is not compiled yet.**

Exporters point out they need advice on access to overseas markets is needed by exporters. In order to expand the quality of consultation service, it is necessary to collect and compile data and information of export/import procedures, overseas market information, exporter and overseas buyer information.

Inquiry and Business Matching Service

- **The number of inquiries currently dealt by MOC/MTC is not many.**

MTC receives monthly 20 - 40 inquiries by phone or e-mail. For inquiries from overseas buyers about Myanmar exporters, MTC introduces the major exporters based on the exporter list. The number of

inquiries has tended to increase, but it is necessary to promote the services. Business matching service is not actively publicized to exporters and foreign buyers.

- **Systematic management of inquiry and business matching has not been formulated.**

Work flow of inquiry and business matching service is not established. Information of exporters needs to be enriched for better business matching.

- **No follow-up is made after the introduction of suppliers for an enquiry from an overseas buyer.**

The records of inquiries are made and kept. But the results of business matching are not followed up as a regular procedure by MTC.

Permanent Display

- **Few businessmen visit the permanent display of MTC.**

Few people visit the permanent display of MTC for that purpose. Visitors who inquire about trade fair issues or visit the library go around the permanent display. The permanent display is not publicized through the media. The recognition of permanent display among business people is low.

- **A clear plan of permanent display is not formulated.**

Myantrade requests Myanmar producers for products to be displayed. MTC displays the collected products paying attention to make them attractive. But there is not a clear plan of permanent plan which include purpose of display, target visitors, ad-hoc display with topic and publicity method.

- **The displayed products are not changed periodically.**

A minor change of display is conducted time to time. However, large-scale display change has not been conducted so far.

Library

- **Few visitors visit libraries.**

Visitors to MTC's library are still very few because the recognition level among business people is very low.

- **The target of the library is not clearly focused.**

The collection of books and publicity do not properly reflect the target visitors of library. The needs of target visitors should be more focused.

- **The variety of stock books does not attract visitors.**

MTC's library stores directories, yellow pages, publication of MOC, publications of international organizations (donated), books on export/import procedures, rules and regulations, statistical yearbooks. The variety of stock has been steadily increased since the establishment. However, the stock must be increased to improve the attractiveness against business people.

- **The budget to buy books is limited.**

No budget is allocated to purchase books to MTC library. MTC try to collect free books from ministries, associations, NGOs and international organization.

- **Library management system has not yet been established.**

There is one staff that has a license of librarian at MTC. However, library management system is still in the course of introduction.

2.2.5 Exporter Development

There are the following issues in the area of exporter development of Myantrade.

- **Systematic and careful exporter development services are not yet provided to potential exporters.**

Myantrade recognizes the necessity of exporter development and value chain development of key industries. However, Myantrade does not have a systematic program for exporter development. Myantrade extends exporter development services in the forms of training, workshop and onsite advise.

- **Technical support is not properly provided to potential exporters.**

Myantrade dispatches technical experts to SMEs with the purpose of improving their export capabilities. Myantrade receives support from NGOs and donors for technical experts. However, dispatch of technical experts is occasional. It is necessary to develop a program for exporter development in order to regularly provide support.

- **The existing trade training is not sufficient for exporter development in regions.**

The collaboration with the Trade Training Institute (TTI) is necessary for exporter development. TTI currently provides four-month trade training to companies' employees and entrepreneurs. But trade training in regions is conducted only on an ad-hoc basis. Some training curriculums, such as export business planning exercise, are practical for exporter development. More practical curriculums should be developed and provided as a short course.

2.2.6 Overseas Operation

The issues of trade promotion services by overseas operation are listed below.

- **Overseas offices of MOC are very limited.**

Overseas operation is an advantage of TPO in providing useful services to local exporters owing to on-site access to overseas market information and buyers. Overseas offices of MOC are only two trade representative offices in Nanning (China) and in Taipei (Taiwan), and a permanent mission office for WTO in Geneva (Switzerland). In addition, a commercial attaché is stationed at 9 embassies among total 25 embassies.

- **The major task for trade promotion of commercial attachés is only market information collection.**

The scope of trade promotion activities which commercial attachés should perform is wide. However, the regular tasks of commercial attachés are collection of market information of countries where they stay.

- **The contents of market reports prepared by commercial attachés are very limited.**

The commercial attachés make and send a monthly market report, but the contents of report are one page covering only price information of major commodities.

- **Scope of work for trade promotion of commercial attaché is not clearly and particularly formulated.**

Myanmar government has dispatched commercial attachés on a trial basis. The scope of work of commercial attachés has not finalized.

- **Commercial attachés have problem of the limitation of time and budget.**

Full-scale of trade promotion activities by commercial attachés is difficult due to the limitation of time and budget.

- **Training of commercial attachés is not enough for trade promotion.**

The commercial attachés were trained by the Ministry of National Planning and Economic Development before dispatch. But training on trade promotion by MOC was not provided to them.

2.2.7 Possible Measures for Trade Promotion Service Issues

The following measures can be considered for the issues of trade promotion services of Myantrade.

Table 2-2: Summary of Management Issues and Possible Measures

Issues	Required Measures
Trade Information <ul style="list-style-type: none"> - The contents of export information provided are very limited. - The capability of market information collection and analysis is weak. - Myantrade does not effectively utilize database for trade promotion. - The information on the websites of Myantrade is mostly in Burmese. 	<ul style="list-style-type: none"> - Develop a plan for market information development for export promotion. - Enhance the collection of data and information by widening sources, especially overseas sources. - Prepare guidelines and manuals for market research. - Implement the capacity development of market research. - Improve the quality and increase the variety of market reports by identifying the priority of market information. - Develop database of market information (overseas market information, suppliers, buyers, etc.). - Improve websites (targeting overseas buyers).
Publication <ul style="list-style-type: none"> - There is limited variety of periodical publications for trade promotion. 	<ul style="list-style-type: none"> - Regularly update exporter/importer directories ("Explore Myanmar").

<ul style="list-style-type: none"> - Most articles of Commercial Journal are written in Burmese. - Brochures of Myantrade's services and Myanmar products are neither attractive nor periodically updated. - There is budget constraint for publication. - The publication is not effectively used for the promotion of Myantrade's services. 	<ul style="list-style-type: none"> - Increase and enrich articles of Commerce Journal on overseas market information. - Add English articles on Commerce Journal or the websites and issue the English version of Commercial Journal. - Periodically revise and improve the brochures of Myantrade, MTC, and regional trade centers. - Newly prepare directories and brochures introducing Myanmar products. - Publish market research reports conducted by Myantrade in the future. - Upload the contents of publications to the websites. - Distribute the publications more broadly including embassies.
Trade Fair	
<ul style="list-style-type: none"> - There are insufficient budgets for participation in overseas trade fairs and for organizing national-level trade fairs. - Myantrade has not established good trade fair management policy and management tools. - Support to Myanmar exhibitors for effective sales promotion is not appropriately provided. - Trade promotion activities at domestic trade fairs are not active. 	<ul style="list-style-type: none"> - Collect the information of world trade fairs. - Select carefully the priority trade fairs to participate or support. - Make use of the opportunity of trade fairs for promotion of national branding. - Have a booth at every domestic trade fair and extend trade promotion services. - Develop standardized and attractive visual identify of display booth, brochure, etc. - Enhance supports to exhibitors/participants. - Follow up the results of trade fairs. - Standardize and monitor domestic trade fairs. - Plan and organize a nation-level domestic trade fair for export promotion.
Exporter/Buyer Service (One-stop Window)	
<u>General</u>	
<ul style="list-style-type: none"> - The recognition level of MTC among exporters and foreign buyers is low. - Facilities and equipment have not been periodically renovated. - More networking and collaboration among MTC and regional trade centers. - Regional trade center is weak in playing a bigger role in exporter development. - Regional trade centers must cover whole region/state with limited personnel. 	<ul style="list-style-type: none"> - Enhance the promotion of MTC by organizing trade events and seminars in addition to the website and publication. - Renew MTC by reviewing the layout, cleaning up and adding new display. - Enhance the collaboration network among MTC and the regional trade centers. - Enhance trade information service of the regional offices by improving the information sharing mechanism using the internet.
<u>Consultation</u>	
<ul style="list-style-type: none"> - The number of personnel who can give hands-on 	<ul style="list-style-type: none"> - Intensively train potential personnel by giving knowledge and skills required for consultation

<p>advice is very limited.</p> <ul style="list-style-type: none"> - Visitors who ask for consultation are few. - Useful data and information for consultation service is not compiled yet. 	<p>service.</p> <ul style="list-style-type: none"> - Publicize the consultation service to attract more visitors. - Prepare data and information necessary for consultation service. - Build a collaboration relationship with other divisions in order to provide timely and adequate advice.
<u>Inquiry & Business Matching</u>	
<ul style="list-style-type: none"> - The number of inquiries currently dealt by MTC is not many. - Systematic management of inquiry and business matching has not been formulated. - No follow-up is made after the introduction of suppliers for an enquiry from an overseas buyer. 	<ul style="list-style-type: none"> - Advertise inquiry & business matching service on the website. - Make use of the opportunity of trade fairs and incoming trade missions for business matching. - Prepare a manual and brochure for inquiry & business matching service. - Follow up a business transaction after the introduction of potential business partners.
<u>Permanent Display (MTC)</u>	
<ul style="list-style-type: none"> - Few businessmen visit the permanent display of MTC. - A clear plan of permanent display is not formulated. - The displayed products are not changed periodically. 	<ul style="list-style-type: none"> - Publicize the permanent displays taking every opportunity and possible means. - Prepare brochures of displayed products with photos, producer name, specifications, etc. - Make the display more attractive with the help of expert. - Plan display with specific theme/objective and periodically change the products. - Organize an event at the permanent display in collaboration with an association.
<u>Library (MTC)</u>	
<ul style="list-style-type: none"> - Few visitors visit libraries. - The target of the library is not clearly focused. - The variety of stock books does not attract visitors. - The budget to buy books is limited. - Library management system has not yet been established. 	<ul style="list-style-type: none"> - Clarify the target of library and make policies and plan of library on the basis of the needs of users. - Consider how to collect necessary books, statistics, directories, etc. - Develop the library management system including collection management. - Train librarians on how to manage the library. - Develop e-library (PC + database) to give digital data of statistics, tariffs, regulations. - Furnish regional trade centers with a library similar to that of MTC.
Exporter Development	
<ul style="list-style-type: none"> - Systematic and careful exporter development services are not yet provided to potential exporters. - Technical support is not properly provided to 	<ul style="list-style-type: none"> - Develop product experts at Myantrade who are in charge of hands-on guidance to potential exporters. - Periodically identify potential exporters as the

<p>potential exporters.</p> <ul style="list-style-type: none"> - The existing trade training is not sufficient for exporter development in regions. 	<p>target of exporter development and to provide integrated support to them in order to realize their exports.</p> <ul style="list-style-type: none"> - Strengthen the collaboration with associations for exporter development. - Provide technical assistance to (potential) exporters in terms of product quality and product design. - Design and initiate programs for national branding. - Support the supply chain development of major export products. - Support export marketing of exporters. - Start a membership service for exporters and overseas buyers. - Periodically held a forum for Myanmar exporters. - Increase practical curriculums at TTI. - Design more variety of trade training courses including short-term courses. - Expand training courses in regions.
Overseas Operation	
<ul style="list-style-type: none"> - Overseas offices of Myantrade are very limited. - The major task for trade promotion of commercial attachés is only market information collection. - The contents of market reports prepared by commercial attachés are very limited. <p>Scope of work for trade promotion of commercial attaché is not clearly and particularly formulated.</p> <ul style="list-style-type: none"> - Commercial attachés have problem of the limitation of time and budget. - Training of commercial attachés is not enough for trade promotion. 	<ul style="list-style-type: none"> - Make use of commercial attachés for trade promotion services to Myanmar exporters and overseas buyers. - Review and redefine the role of commercial attachés for trade promotion in order to widen their activities. <p>Prepare and provide standard guidelines of activities for commercial attachés including market research and other trade promotion services.</p> <ul style="list-style-type: none"> - Give additional training to commercial attachés for trade promotion. - Dispatch officers of Myantrade to the embassies in the priority target countries.

Chapter 3 Roadmap for Trade Promotion

3.1 Framework of Roadmap for Trade Promotion

3.1.1 Structure of Roadmap for Trade Promotion

The Roadmap for Trade Promotion is composed of two parts: management enhancement and service enhancement. The management enhancement aims to cope with management issues, policy, organization, management system and human resource.

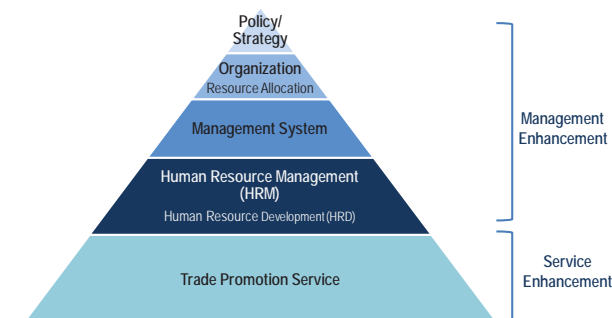


Figure 3-1: Structure of Roadmap for Trade promotion

3.1.2 Timeframe of Roadmap for Trade Promotion

The measures for strengthening Myantrade's 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) quick-win action phase (Phase 1), ii) short-term phase (Phase 2) and iii) medium-term phase (Phase 3).

- Phase 1:** The period to build the capabilities of providing basic trade promotion function (for quick-win 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).

Figure 1-x explains the three phases of Roadmap for Trade Promotion.

* JICA Project on Enhancement of Investment Promotion and Export Development has supported the capacity development for the Phase 1.

Timeframe for Organization Reform

Myantrade was established as a department exclusively specialized in trade promotion. Its organization is

designed to provide trade promotion effectively by reorganizing DTPCA. The final goal of Myantrade's organization is a full-fledged TPO such as is seen in other countries. However, the path to the final goal can be taken stepwise considering the existing expertise and resources of Myanmar.

Phase 1: To conduct institutional enhancement of Myantrade under the current organizational framework on the basis of existing personnel and existing services in order to realize more effective provision of trade promotion services (for quick-win actions).

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 quick-win 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 establish and improve basic trade promotion services (for quick-win 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.

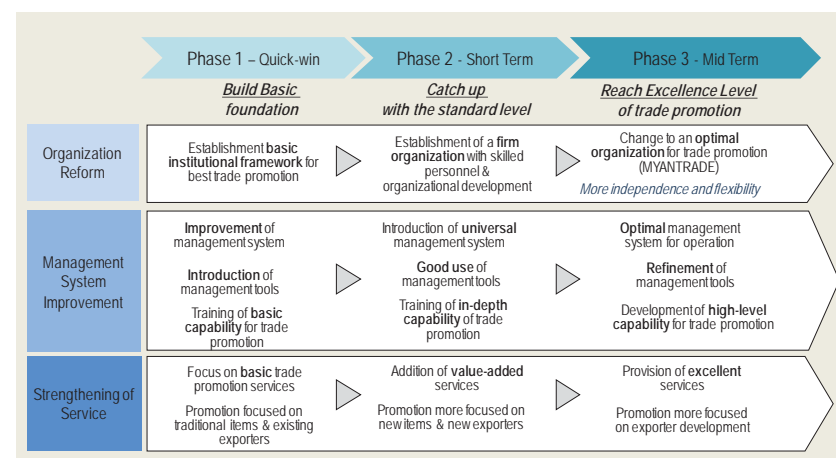


Figure 3-2: Three Phases of Roadmap

The workflow within Phase 1 for quick-win action is shown in Figure 1-x. This is a start-up stage to concentrate on the establishment of basic foundation for trade promotion. In this phase, the improvement of basic trade promotion service is designed and quick-win measures for institutional building, management enhancement, service provision and human resource development (HRD) are implemented. All these measures should be conducted in an interrelated manner.

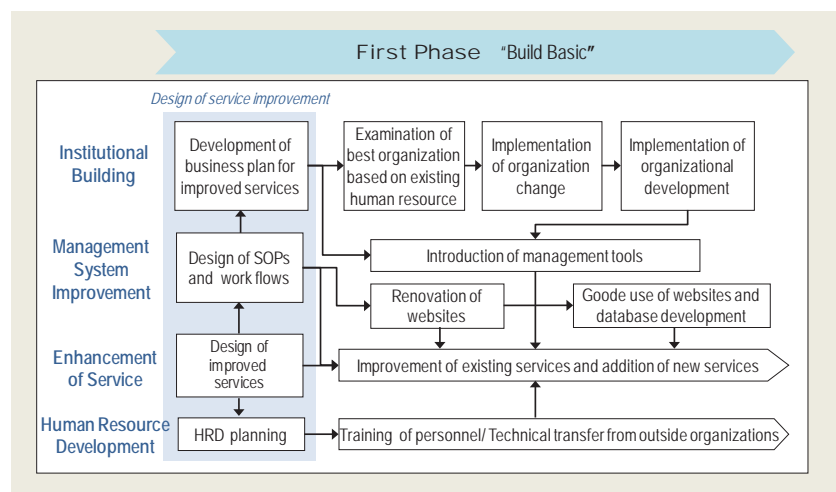


Figure 3-3: Framework of Quick-win Action Phase (Phase 1)

3.2 Management Enhancement Plan

3.2.1 Framework of Management Enhancement

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

Table 3-1: Framework of Management Enhancement

Management Components	Contents
Policy Framework	(1) Expand export to the existing overseas markets (2) Improve market access to overseas markets for market diversification
Export Development Strategies for Myanmar's Export Growth	(3) Promote the development of new export products for product diversification (4) Improve the value-addition of export products (5) Improve the competitiveness of export products
Mission	<u>Direct Support to Exporters and Foreign Buyers</u> (1) Export promotion activities (2) Market development (3) Product adaptation and product development (4) Exporter development <u>Collaboration with Related Organizations</u> (5) Implementation of the National Export Strategy (NES) (6) Support to export-related organizations (7) Promotion of export-oriented foreign direct investment (FDI)
Strategy	(1) Myantrade exhibits stronger leadership as the focal point in trade promotion of Myanmar. (2) Myantrade continues to enhance institutional capability which enables effective trade promotion services.

	<p>(3) Myantrade introduces management methods and tools which are widely used by the private sector as well as other TPOs for effective operation of trade promotion services.</p> <p>(4) Myantrade creates business-oriented and proactive organizational culture among officers and staff.</p> <p>(5) Myantrade focuses on the development and provision of high-quality services for effective trade promotion of Myanmar.</p> <p>(6) Myantrade gives the priority of the human resource development (HRD) in order to improve the level of trade promotion services.</p> <p>(7) Myantrade strives to ensure the allocation of necessary budget and human resource.</p>
Organization Reform	<p>(1) Enhance an organization so that Myantrade can effectively provide integrated trade promotion services</p> <p>(2) Modify the organization structure by reviewing the optimal structure for Myantrade's services</p> <p>(3) Realize simple, flexible and smooth operation and avoid the complexity of line of reporting</p> <p>(4) Create business-oriented mind-set and work culture among the personnel</p> <p>(5) Move more trade promotion function in Nay Pyi Taw to Yangon</p> <p>(6) Establish good work collaboration network among MTC and regional trade centers by reviewing the scope of MTC and regional trade centers</p> <p>(7) Become a stand-alone TPO which has an autonomous status</p>
Resources Allocation	<p>(1) Establish budgeting mechanism of budgeting for trade promotion programs & activities</p> <p>(2) Search for possible source of funds</p> <p>(3) Increase own revenue from fee-based services</p>
Management System	<p>(1) Establish a strong planning function and an administration function</p> <p>(2) Learn the best practices of other TPOs and design new services</p> <p>(3) Establish workflows and procedures of trade promotion services</p> <p>(4) Clarify the line of command and job assignment</p> <p>(5) Introduce management methods which are effective for management improvement</p> <p>(6) Develop information system of Myantrade</p>
Human Resource Management	<p>(1) Conduct total human resource management which interlinks job assignment, personnel evaluation, career path and human resource development (HRD)</p> <p>(2) Realize job rotation for the right person in the right place</p> <p>(3) Develop capable personnel who can be core members for trade promotion</p> <p>(4) Formulate and implement comprehensive human resource development plan</p> <p>(5) Make use of sources of capacity development such as TTI and technical assistance of internal organizations</p>
Service Operation (Trade Promotion Services)	<p>1) Develop a mechanism which enable cross-divisional collaboration for interlinked and proactive trade promotion services.</p> <p>2) Take an approach of exporter development including SME exporters which exceeds trade promotion in a narrow sense.</p> <p>3) Provide adequate support to exporters according to the stages of growth.</p> <p>4) Confirm the responsibilities of related divisions in providing integrated trade promotion services to target exporters.</p>

3.2.3 Policies for National Export Development

Considering the current situation of Myanmar's export, necessary strategies for export growth of Myanmar can be summarized as follows:

- Expand export to the existing overseas markets
- It is required to increase supply capacity to increase major export products to the major markets. The establishment of favorable trade relationship with the neighboring countries and smooth logistics are necessary for stable growth of export.
- Improve market access to overseas markets for market diversification
- Top three destination countries, i.e., China, Thailand and India, account for 69% of total export (FY2016/17). Market development is required to newly increase major destination countries of export.
- Promote the development of new export products for product diversification
- New export products are created through capital investment, technical transfer and exporter development. Promotion of investments by export-oriented foreign companies (FDI) is also an effective measure as seen in the experience of advanced ASEAN countries.
- Improve the value-addition of export products
- The processing level of major export products are comparatively low. Most agricultural products are exported as commodity. Exported garments are low value-added on a production contract basis. It is also necessary to increase value-added of export products in order to raise Myanmar's position in the global market.
- Improve the competitiveness of export products
- Improvement in the competitiveness of Myanmar products in quality and price is a basis for export development and building of Myanmar brand.

It is noted that "trade promotion" includes a wider scope of activities of expanding export, e.g., exporter development, than sales promotional activities.



Figure 3-4: Export Development Strategies

3.2.4 Mission of Myantrade in National Export Development

Myantrade aims to play the following function as its mission to implement national export development strategies:

Direct Support to Exporters and Foreign Buyers

- Export promotion activities
- Myantrade facilitates export businesses between exporters and foreign buyers by providing market information, trade fairs, trade missions, business meetings, business matching, etc.
- Market development
- Myantrade conducts marketing activities targeting prioritized new markets by conducting market research, trade fairs, trade missions, business meetings and business matching, etc.
- Product adaptation and product development
- Myantrade assists exporters to modify their products according to requirements of target countries and develop new products to export.
- Exporter development
- Myantrade should support potential exporters to start exports by providing training, market information, consultation, etc.

Collaboration with Related Organizations

- Implementation of the National Export Strategy (NES)
- Myantrade robustly promotes the implementation of NES by involving related ministries, the private sector and international organizations.
- Support to export-related organizations
- Myantrade collaborates with export-related organizations such as forwarders, laboratories,

business associations, etc., and support their activities for export promotion and export development.

- Promotion of export-oriented foreign direct investment (FDI)
- Myantrade collaborates with the investment promotion by the Directorate General of Investment and Company Administration in inviting export-oriented FDI to Myanmar.



Figure 3-5: Role of Myantrade in National Export Development

Note: Correspondence between Myantrade's Role and Export Development Strategy

The correspondence between the proposed Myantrade's role and export development strategies can be explained according to the Ansoff's growth matrix. The first quadrant in the matrix is a strategy of market penetration for expanding existing export products within existing overseas markets. Export promotion is an effective measure in this case. The second quadrant requires market development to enter non-traditional markets with existing export products. In the third quadrant, product development is an applicable strategy of introducing new products development to expand exports to the existing markets. The fourth quadrant is the diversification of introducing new export products into new markets.

Export promotion is applicable the market penetration in the first quadrant and market development may fall into the second quadrant. Product development and exporter development are required by the third quadrant and the fourth quadrant.

Table 3-2: Types of Export Development According to Ansoff's Growth Matrix

	Existing Market	New Market
Existing Product	Market penetration - Export promotion	Market development - Market development
New Product	Product development - Product adaptation - Product development - Exporter development	Diversification - Product development - Exporter development - Market development

3.2.5 Strategies for the Enhancement of Myantrade

Trade promotion of Myantrade primarily targets export development of Myanmar, i.e., the diversification of markets and products and the upgrading of exporters. Myantrade should act as a key focal point for trade promotion in Myanmar by building clear strategic direction and strong leadership by overcoming various internal and external constraints of trade promotion in Myanmar.

The followings are strategies for management enhancement of Myantrade.

1) Myantrade exhibits stronger leadership as the focal point in trade promotion of Myanmar.

Myantrade extends strong leadership and commitment internally and externally as a stronger promoter of export of Myanmar as the focal point of trade promotion of Myanmar.

Effective export development needs a collaboration of related ministries such as the Ministry of Agriculture, Livestock and Irrigation, Ministry of Industry, Ministry of Planning and Finance (Directorate of Investment and Company Administration), Customs Office et cetera. They collaborate for the implementation of the National Export Strategy (NES). Myantrade should assume the leadership in developing good business environment for export development.

2) Myantrade continues to enhance institutional capability which enables effective trade promotion services.

It is required to establish an organization with expertise in trade promotion and sufficient allocation of resources so that various trade promotion services are provided effectively. The organizational goal of Myantrade is to be a stand-alone TPO which provides full-fledged trade promotion services.

3) Myantrade introduces management methods and tools which are widely used by the private sector as well as other TPOs for effective operation of trade promotion services.

Myantrade considers the introduction of management methods for the systematical and effective management of trade promotion services. These methods include the standard operating procedures (SOPs), balanced scorecard with key performance indicators, process and service improvement management with a *Plan-Do-Check-Adjust* cycle, benchmarking with best practices of other TPOs, etc.

4) Myantrade creates business-oriented and proactive organizational culture among officers and staff.

Export is a business transaction done between an exporter and a buyer with profit-seeking motivation. The users of Myantrade's trade promotion services are mostly private businesses: Myanmar exporters and overseas buyers. Myantrade must have business-oriented mind to satisfy their demand by its services.

The organization culture and management of Myantrade 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.

5) Myantrade focuses on the development and provision of high-quality services for effective trade promotion of Myanmar.

Myantrade should prepare and start trade promotion services that are regarded valid and commonly provided by TPOs. It is also necessary to review and streamline the existing services from the viewpoint of relevance, effectiveness and needs in order to concentrate resource on priority services.

6) Myantrade gives the priority of the human resource development (HRD) in order to improve the level of trade promotion services.

The personnel in charge of trade promotion at Myantrade 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 (TTI) and seek the assistance from possible domestic service providers, donor organizations, other TPOs and so forth.

7) Myantrade strives to ensure the allocation of necessary budget and human resource.

The insufficient budget is a big constraint of trade promotion of Myantrade. Even though the budget of Myantrade is limited, it is desirable to secure minimum budget for trade promotion by examining its cost-effectiveness. Myantrade gradually increases own revenue from fee-based services by developing high value-added trade promotion services.

3.2.6 Organization Reform

Objectives

The establishment of Myantrade, i.e., the transformation of DTPCA into a trade promotion organization, is one of strategic objectives of NES (Activity No. 4.1.1). The strategy of NES is to establish TPO as a stand-alone organization with legislation establishing the TPO. Although the status of Myantrade is one department of MOC, Myantrade is given a discretionary administration in MOC.

Myantrade continues the reformation of organization in line with the progress of service enhancement and change in needs for trade promotion.

The organization reform should be examined and implemented with the following objectives:

1) Enhance an organization so that Myantrade can effectively provide integrated trade promotion services

- The scope of trade promotion is wide because Myantrade must address the challenge of transforming the traditional export structure. Myantrade needs to promote the diversification of

products and markets, high value-added export products, export-related infrastructure, 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 to work on trade promotion agenda. Myantrade should review the functions of divisions from the viewpoint of integrated trade promotion services.

2) Modify the organization structure by reviewing the optimal structure for Myantrade's services

- Every TPO modifies its organization structure from time to time when they are forced to change their menu of services and approach of service provision in response to the growth of export sectors and global business development.
- Myantrade examines the relevance of its organization structure and make necessary adjustment for better system of service provision for trade promotion.

3) Realize simple, flexible and smooth operation and avoid the complexity of line of reporting

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

4) 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. Important factors are value-sharing, communication, cross-divisional collaboration, and commitment to organizational objectives. It is necessary to repeat the mission of Myantrade which must be a service provider targeting exporters.

5) Move more 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 Myantrade. 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) 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 should be also strengthened mutual understanding and knowledge sharing.

7) Become a stand-alone TPO which has an autonomous status

- When Myantrade accumulates sufficient expertise of trade promotion and acquires proactive work culture, the establishment of an independent body becomes an option of more effective

organization.

Required Actions

1) Establish and enhance basic institutional framework for best trade promotion

In the Phase I: Quick-win, Myantrade will enhance the institutional framework with the purpose of establishing an organization for the provision of integrated trade promotion services by the following measures.

- Myantrade prepares and design functions and services which are generally conducted by TPOs and required by Myanmar's exporters.
- Myantrade re-examines the functions of each division by including new services and streamlining unnecessary or ineffective services.
- Myantrade takes measures to promote the collaboration among the division for effective provision of services to exporters and foreign buyers. One example is a matrix or virtual organization by exporter sector under which relevant division cooperate to provide integrated services to a target export sector.
- Myantrade enhances the communication and collaboration with the private sector by moving more functions from Nay Pyi Taw to Yangon. Closer relationship with the private sector is necessary to understand their problems and needs and the implementation of collaborative trade promotion.
- Myantrade enhances the functions of MTC and regional trade centers and promote the collaboration among them. The allocation of more resources to regional trade centers is needed to realize tangible services by them.
- Myantrade establishes a close collaboration with Myanmar's embassies overseas for trade promotion.

2) Redesign and implement structural change timely when needed, responding to external/internal business environments and change of needs for trade promotion

- A stepwise approach to strengthening organization for trade promotion is necessary. The sequence of the organizational reform will be evaluated from the viewpoints of relevance, impact and ease of implementation. An organization structure should reflect all the aspects of strategy, scope of trade promotion service, philosophy of administration and the will of management.
- It is desirable to move TTI to Myantrade to integrate exporter training to the integrated trade promotion of Myantrade.
- When Myantrade becomes able to provide basic trade promotion services and accumulate a certain level of experience and knowhow, the organization structure will be examined to provide more extensive services.

3) Become a stand-alone TPO which has an autonomous status

- Myantrade will be transformed to be a stand-alone TPO with an autonomous status under a new legislative law. An important factor for the competitive organization of new TPO is the involvement of the private sector in the forms of board members and/or executive members.

Organization reform of Myantrade will be implemented stepwise according to the stages of development.

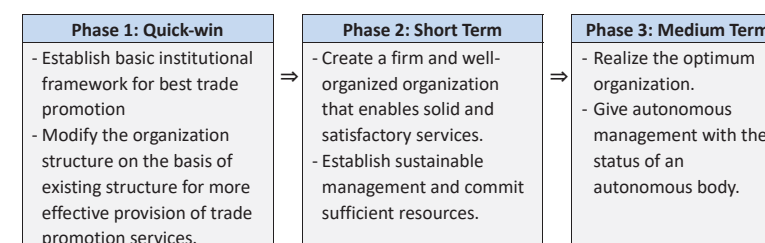


Figure 3-6: Steps of Organization Reform

Note: Factors for Designing Organization Structure

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 exporter 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.

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.

Optimal/minimum size of organization

Myantrade 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 which functions are needed for effective trade promotion and what are resources necessary for those functions.

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.

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.

Selection of status of trade promotion organization (TPO)

At the decision of a status of TPO, merits and demerits of options, such as a department in MOC and a stand-alone organization, should be examined considering the current export situation and policy environment.

Implementation Schedule

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

Table 3-3: Implementation Schedule: Organization Reform

Organization Reform				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Establish and enhance basic institutional framework for best trade promotion	■		
2	Redesign and implement structural change timely when needed		■	
3	Become a stand-alone TPO which has an autonomous status			■

Note: ■ : Core activity period ■ : Continuation or follow-up period

3.2.7 Management System

Objectives

The management system improvement aims at the following improvements:

1) 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.
- The research function is important to enable the formulation of a competent export promotion plan. Global business trend and economic situation of Myanmar should be studied and appropriately analyzed for planning.
- A strong planning function becomes more important when an independent TPO is established.

2) Learn the best practices of other TPOs and design new services

- Other TPOs are good source of information about best practice of management. Myantrade learns from the experience of other TPOs for its planning of trade promotion services.

3) Establish workflows and procedures of trade promotion services

- Myantrade 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.
- Myantrade prepares workflows and standard operating procedures (SOPs) including target level of service, appropriate work process, necessary resource, and required competencies of persons in

charge.

4) 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 Myantrade officers and staff. 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) Introduce management methods which are effective for management improvement

- Myantrade introduces management methods commonly adopted by private enterprises for the improvement of management of Myantrade. Typical management methods are SOPs, manuals and guidelines, management by objectives, and key performance indicators. Management by objectives can be used to ensure that Myantrade's objectives are interactively deployed throughout the whole organization. Especially, these methods are useful when Myantrade becomes a stand-alone organization as TPOs in the advance ASEAN countries have adopted them.

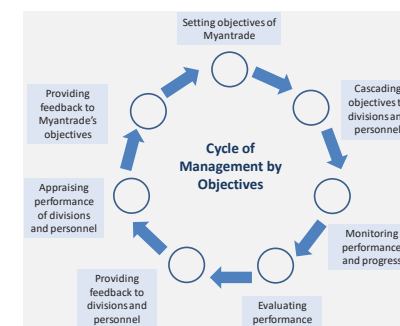


Figure 3-7: Cycle of Management by Objectives

6) Develop information system of Myantrade

- It is necessary to prepare and upgrade information system of Myantrade such as trade information database, exporter/buyer database, website, internet system linking regional trade centers. Insufficient allocation of computers to officers and staff are solved.

It is necessary to implement the above management enhancement step by step. The good operation of management methods can be achieved by steadily accumulating know-how and experience.

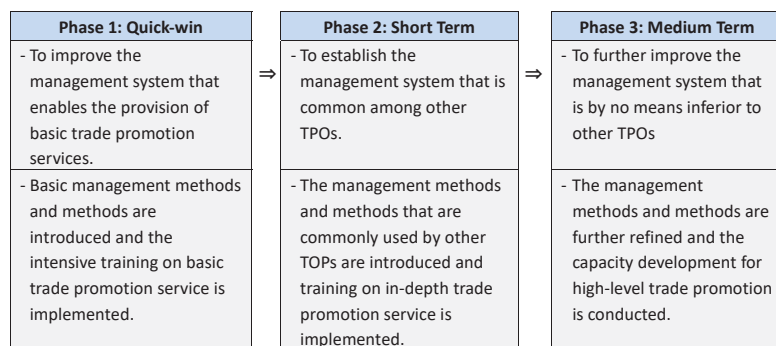


Figure 3-8: Steps of Management Enhancement

Required Actions

1) Enhance strategic planning and formulate annual budget based on the strategic plan

- Myantrade formulates a strategic plan of trade promotion on the basis of the Roadmap for Trade Promotion. Annual budget planning should be made in line with the strategic plan.
- Myantrade studies best practice of other TPOs and reflect the results of study in the strategic plan.

2) 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) Check the developed workflows and consider streamlining the decision-making process for efficient provision of services.
 - iv) Formulate SOPs based on the developed workflows.
 - v) Introduce management methods such as manuals and guidelines in addition to SOPs.

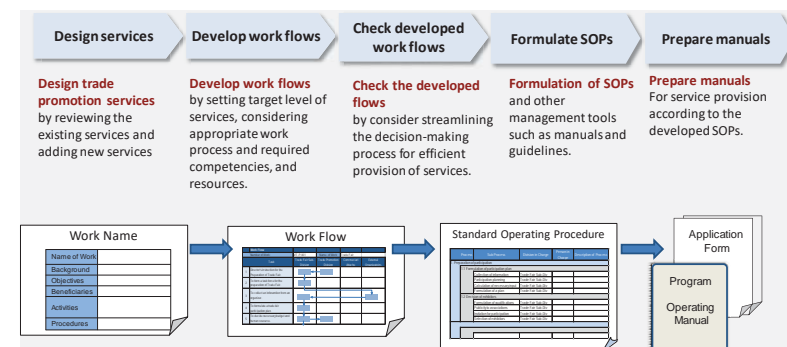


Figure 3-9: Process of SOP Formulation

3) Introduce the management by objectives and performance evaluation

- Myantrade sets 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.

4) Introduce key performance indicators for annual planning and evaluation

- As an original usage, key performance indicators are useful for formulating objectives of activities and quantitative/qualitative measurement of achievements. Key performance indicators are set at the whole Myantrade level and at each division level.
- As most of personnel of Myantrade 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.

Table 3-4: Example of Key Performance Indicators

Indicator	Year 1	Year 2	Year 3
No. of Market Reports			
No. of Trade Fairs Participated			
Value 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			
Other indicators are to be continued			

5) Promote the use of information technology (IT)

- There are many problems for the use of IT at Myantrade. For example, a personal computer is not allocated to all the officers and staff. Records of inquiries or consultation are not maintained in the form of database. The websites need 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 and internal communication. The website should be also upgraded and used more actively for trade promotion.

Implementation Schedule

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

Table 3-5: Implementation Schedule: Management System

Management System				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Enhance strategic planning and formulate annual budget based on the strategic plan			
2	Formulate workflows and clear-cut SOPs for trade promotion activities in order to realize effective provision of services			
3	Introduce the management by objectives and performance evaluation			
4	Introduce key performance indicators for annual planning and evaluation			
5	Promote the use of information technology (IT)			

Note: : Core activity period : Continuation or follow-up period

3.2.8 Human Resource Management (HRD)

Objectives

The organization reform are conducted with the following objectives:

1) Conduct total human resource management which interlinks job assignment, personnel evaluation, career path and human resource development (HRD)

- Under total human resource management system, job assignment, personnel evaluation, job rotation, career path and HRD are interlinked. 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 as mentioned above in "1.5.6 Management System".

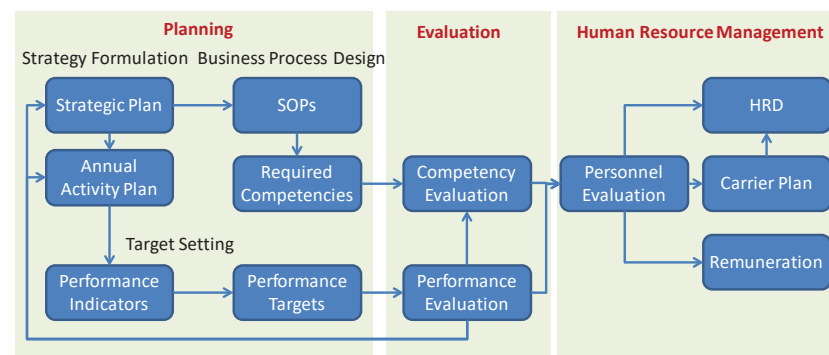


Figure 3-10: Process of Total Human Resource Management

2) 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.
- Job rotation is decided according to career path plan of personnel based on personnel evaluation.

3) 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 Myantrade. It is an urgent issue to create competitive personnel for trade promotion.

4) Formulate and implement comprehensive human resource development plan

- Myantrade 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. Myantrade will formulate a HRD plan 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.

5) 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. Various international organizations may provide training programs for Myantrade personnel.

Required Actions

1) Utilize the evaluation system of personnel for carrier development, HRD and personnel allocation

- The result of personnel evaluation base on the management by objectives can be utilized for carrier

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.

2) Formulate a carrier 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 Myantrade. It is necessary to develop a training plan considering the career development perspective.

3) 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.

4) 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. Myantrade 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.

5) Conduct training for step-by-step capacity development according to the priority trade promotion services and the level of personnel

- Myantrade designs 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.

6) 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 Myantrade. 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. This group is expected to become future leaders of Myantrade.

7) 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 Myantrade personnel on export promotion. It is necessary to prepare curriculums for Myantrade officers and staff and dispatch them regularly. TTI's training is effective especially for newly-recruited personnel.
- On the other side, Myantrade make recommendations for the improvement of TTI curriculums and training material by feedbacking the needs of exporters.

8) 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. Myantrade 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 3-6: Implementation Schedule: Human Resource Management

Human Resource Management				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Utilize the evaluation system of personnel for carrier development, HRD and personnel allocation			
2	Formulate a carrier development plan of personnel from a long-term perspective			
3	Implement the job rotation as a part of career development and allocate the right persons to the right places			
4	Formulate a training plan based on the results of Training Needs Analysis			
5	Conduct training for step-by-step capacity development according to the priority trade promotion services and the level of personnel			
6	Select potential personnel and intensively train them to become key persons of trade promotion, experts of product/market, or trade advisor			
7	Collaborate with TTI for personnel training on trade promotion and international business			

8	Make use of technical assistance of international organizations for capacity building of personnel			
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Note:  : Core activity period  : Continuation or follow-up period

3.2.9 Resource Allocation

Resource allocation is recognized as big common obstacle for every aspect of trade promotion enhancement.

Objectives

1) Establish budgeting mechanism of budgeting for trade promotion programs & activities

- Limited amount of budget is a serious constraint of Myantrade in securing sufficient personnel, expanding facilities of regional trade centers, building overseas offices and extending robust services to Myanmar exporters.
- Budget necessary for the proposed trade promotion services should be secured for Myantrade.

2) Search for possible source of funds

- Myantrade should search for possible sources of funds such as associations and international organizations.

3) Increase own revenue from fee-based services

- Myantrade should develop and increase own revenue from fee-based services from exporters and foreign buyers.

Required Actions

1) Secure necessary budget necessary for priority trade promotion service

- It is necessary to secure budget to cover expenses for personnel, facilities and equipment that are required for priority services.
- It is important to prioritize activities and programs within the limited budget from the viewpoints of the needs and cost effectiveness.

2) Gain the consensus of the government about necessary budget for trade promotion

- It is necessary to formulate attractive export promotion programs and secure necessary budget in order to gain the consensus of the government about the importance and effectiveness of trade promotion.

3) Promote the collaboration with the private sector and international organizations

- Myantrade should promote the collaboration with the private sector and international organization for implementing priority programs for trade promotion.



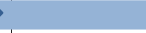


4) Increase own revenue from publication, service fees, etc.



- Myantrade should develop value-added services to receive service fees from those services, at lease, for cost recovery.
- Possible sources of revenue are publication, membership service fee, customized overseas market research, trade exhibition booth fee, overseas marketing support, commission for e-commerce, etc.

Implementation Schedule

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

Table 3-7: Implementation Schedule: Resource Allocation

Resource Allocation				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Secure necessary budget necessary for priority trade promotion service			
2	Gain the consensus of the government about necessary budget for trade promotion			
3	Promote the collaboration with the private sector and international organizations			
4	Increase own revenue from publication, service fees, etc.			

Note:  : Core activity period  : Continuation or follow-up period

3.3 Trade Promotion Service Enhancement Plan

3.3.1 Basic Policies for Service Enhancement

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

1) Develop a mechanism which enable cross-divisional collaboration for interlinked and proactive trade promotion services.

It is not long since Myantrade was established. Therefore, the variety of trade promotion services currently provided Myantrade is still 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.

Trade promotion services to be developed should be inextricably linked across division. Information and database are basic component of trade promotion services. A variety of services are provided using the collected information and database. New information and data are collected through service provision. Therefore, it is necessary to establish a collaborative relationship among the organization and confirm that all members of Myantrade fully understand their role in Myantrade's provision of integrated trade promotion services.

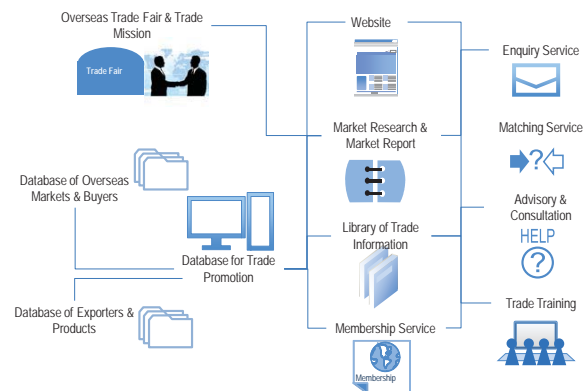


Figure 3-11: Concept of Interlinked Services for Trade Promotion

2) Take 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 potential exporters, mostly SMEs, since they have insufficient experience in international trade, insufficient access to trade information and overseas markets.

The Trade Development Division coordinates the implementation of NES activities/projects. These activities include projects in the area of supply chain development of the priority sectors. TTI under the Department of Trade train future exporters. In addition, Myantrade provide supports to potential exporters so that they can get necessary information of export procedures, overseas market information, technical advice and so on.

3) Provide 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 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.

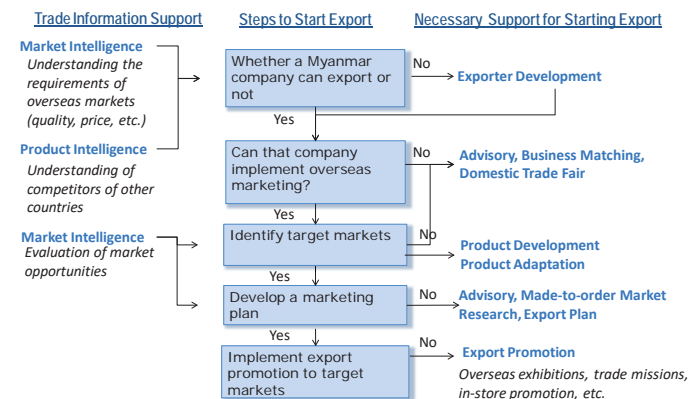


Figure 3-12: Necessary Support by Level of Exporter

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.

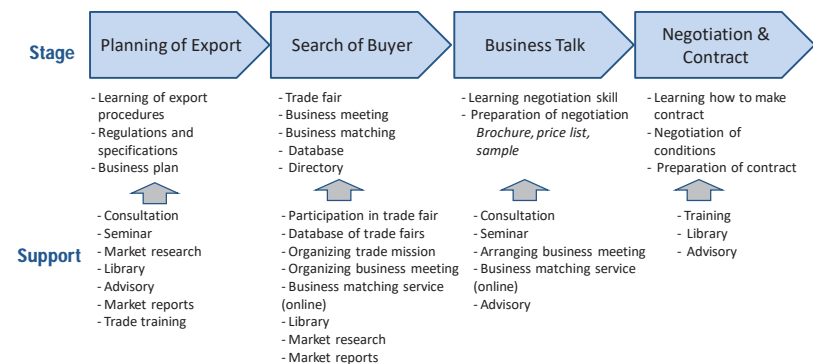


Figure 3-13: Step-wise Support from Export Planning until Contract

4) Confirm the responsibilities of related divisions in providing integrated trade promotion services to target exporters.

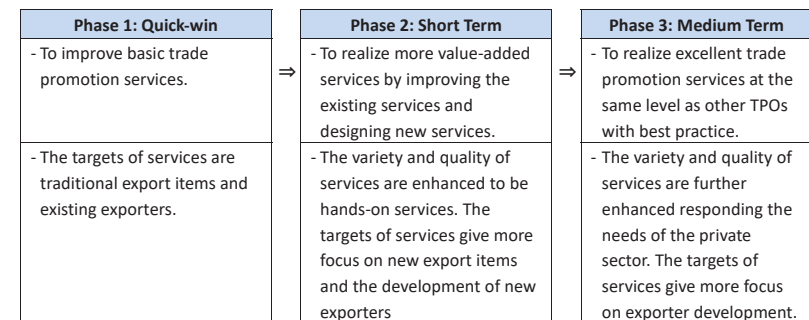
Myantrade will form groups by priority product to collaborate across the divisions for effective provision of services targeting the priority industries. Members from the divisions will organize teams to collaborate to trade promotion of target industries.

An organization consisting of groups by product/industry has advantage of close communication with the specific industry, accumulation of expertise of specific industry among persons in charge, and the

		Divisions of Myantrade				
		Trade Information & Information Division	Strategic Trade Promotion Division	Domestic Trade Division	Domestic Development Division	Target Exporters
Task Force Teams by Product	Fishery Team	Trade Promotion Services				Fishery Industry
		▪ Market Information	▪ NES Implementation	▪ Exporter Development	▪ Trade Fair ▪ Business Meeting	
	Food Team	▪ Industry Information			▪ Consultation ▪ Business Matching	Food Industry
	Manufactured Goods Team	▪ Buyer Information				Manufacturing
	Export-oriented FDI Team					FDI
	•					
	•					
•						
•						
•						

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.

It is noted that trade promotion services are to be developed according to the development of exporters in Myanmar. There is a large gap of export environment between Myanmar where the economy has just recently opened up and the advanced ASEAN countries. Needs for trade promotion by exporters naturally differ between them. Therefore, actions for service enhancement should be designed by examining carefully the needs of exporters and overseas buyers and best practice of other TPOs.



Major divisions responsible for individual trade promotion services are as shown in the following table. However, as mentioned above, other divisions must collaborate and be involved in the provision of services.

Trade Promotion Service	Sub-Function	Major Division in Charge
Export Promotion Planning	Policy Advocacy	Planning & Finance Division, Strategic Trade Promotion Division
Market Information	Publication	Trade Information and Research Division
Trade Fair & Exhibition		Trade Development Division
Exporter/ Foreign Buyer Support Service	Consultation, Inquiry & Business Matching, Permanent Display, Library	Domestic Trade Division, Trade Development Division (Myanmar Trade Center)
Exporter Development		Domestic Trade Division, Strategic Trade Promotion Division
Export Training (Department of Trade)		Trade Training Institute

Required Actions

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.

Myantrade will formulate a plan of market information development which includes the priority information, methods of provision, and necessary organization. It is also necessary to implement the plan step-by-step.

2) 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 Myantrade.

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.

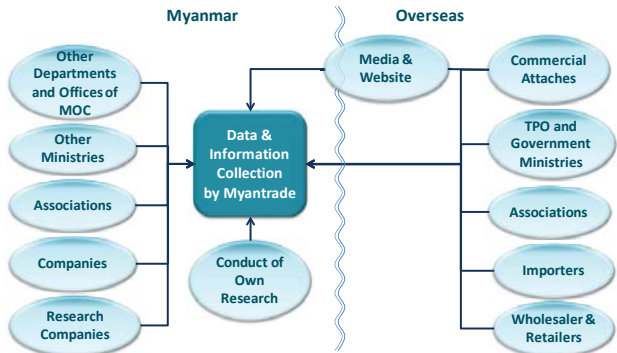


Figure 3-16: Source of Data and Information

3) Prepare guidelines and manuals for market research

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

4) 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) Improve the quality and increase the variety of market reports by identifying the priority of market

information

Myantrade 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 3-9: Examples of Market Reports

<u>Types of Reports:</u>
- 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)
<u>Purpose:</u>
- Increase the awareness/knowledge of suppliers/exporters
- Provide necessary information to policy makers

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

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

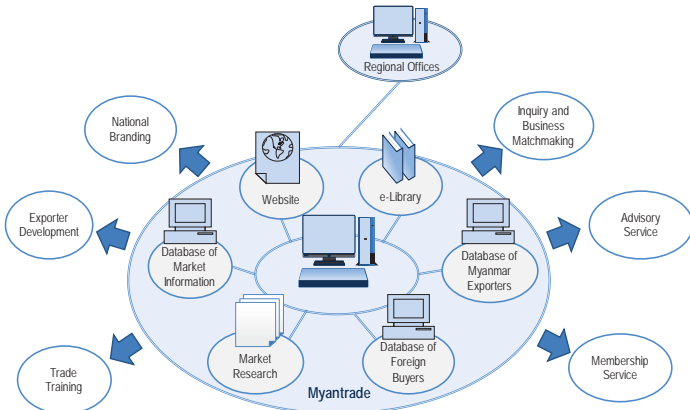


Figure 3-17: Market Information Database as Core of Trade Promotion Services

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

Table 3-10: Purpose of Information Collection by Type of User

User	Purpose	Information
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Exporters	Finding of target market Understanding market requirements Import procedures of target market Evaluation of potential of market entry Finding of potential buyers	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - Trade statistics - Market reports - Trade information (Overseas market information)
Overseas Buyers	Evaluation of potentiality as supplier Export procedures of Myanmar Finding of potential suppliers	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - 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 3-11: Examples of Major Items of Trade-related Regulations by Country

Categories	Information
Restriction of Countries/Regions	✓ Restricted countries/regions, etc.
Quantitative Control	<ul style="list-style-type: none"> ✓ Prohibited and restricted goods ✓ Import quota system, import control list, ✓ Safeguard provision and anti-dumping measures
Product Safety	<ul style="list-style-type: none"> ✓ Regulations on food Sanitation ✓ Regulations on livestock Importation ✓ Standards and regulation of product safety of manufactured products
Standards	<ul style="list-style-type: none"> ✓ Industrial and agricultural standards of products (for example, ISO, JIS for Japan) ✓ Standards of weights and measures
Customs Clearance	<ul style="list-style-type: none"> ✓ Pre-shipment inspection (PSI) ✓ Customs clearance documents ✓ Import licenses, importer registration
Tariffs and Duties	<ul style="list-style-type: none"> ✓ Tariff classification ✓ Preferential tariffs ✓ General Systems of Preferences (GSP) ✓ FTAs
Certificate	<ul style="list-style-type: none"> ✓ Rules of origin, certificate of origin ✓ Application for import certificate ✓ Certificates of Import quarantine (e.g. phytosanitary certificate, health certificate, etc.)
Terms of Payment	<ul style="list-style-type: none"> ✓ 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
Supervisory Authority and Contact	<ul style="list-style-type: none"> ✓ Ministry of Trade/Commerce ✓ Customs ✓ Ministry of Finance ✓ Ministries regarding to regulations

Other Useful Information	<ul style="list-style-type: none"> ✓ Associations ✓ Major industry players ✓ List of trade fairs
--------------------------	---

7) Improve websites (targeting overseas buyers)

The contents of the existing websites of Myantrade 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:

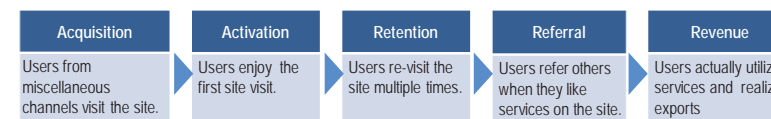
Table 3-12: Information on Website

<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 Myantrade

The portal site for trade promotion should be developed by renovating the existing website. This is because there is no noticeable portal site for Myantrade's trade promotion services.

The portal site of Myantrade'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: Based on Dave McClure, "Web Strategy for Pirates: AARRR!!!"

Figure 3-18: 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 3-13: Implementation Schedule: Trade Information

Trade Information				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Develop a plan for market information development			

2	Enhance the collection of data and information by widening sources, especially overseas sources	
3	Prepare guidelines and manuals for market research	
5	Implement the capacity development of market research	
6	Improve the quality and increase the variety of market reports by identifying the priority of market information	
7	Develop database of market information (overseas market information, suppliers, buyers, etc.)	
8	Improve websites (targeting overseas buyers)	

Note: : Core activity period : Continuation or follow-up period

3.3.3 Publication

Required Actions

1) Regularly update exporter/importer directories

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

2) 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) 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) Periodically revise and improve the brochures of Myantrade, 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) Newly prepare brochures introducing Myanmar products

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

6) Publish market research reports conducted by Myantrade in the future

Myantrade will publish market research reports when its market research capabilities are strengthened.

7) Upload the contents of publications to the websites

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

8) Distribute the publications more broadly including embassies

It is necessary to widely distribute publications targeting foreign buyers.

Implementation Schedule

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

Table 3-14: Implementation Schedule: Publication

Publication				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Regularly update exporter/importer directories			
2	Increase and enrich articles of Commerce Journal on overseas market information			
3	Add English articles on Commerce Journal or the websites and issue the English version of Commercial Journal			
4	Periodically revise and improve the brochures of Myantrade, MTC, and regional trade centers			
5	Newly prepare brochures introducing Myanmar products			
6	Publish market research reports conducted by Myantrade in the future			
7	Upload the contents of publications to the websites			
8	Distribute the publications more broadly including embassies			

Note: : Core activity period : Continuation or follow-up period

3.3.4 Trade Fair

Required Actions

1) 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) Select carefully the priority trade fairs to participate or support Myanmar exhibitors

Myantrade 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) 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) 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 Myantrade at the prominent place and extend promotion activities for Myanmar exports.

5) Develop standardized and attractive visual identify 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) 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) 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) 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) 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 3-15: Implementation Schedule: Trade Fair and Exhibition

Trade Fair and Exhibition			
Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium

1	Collect the information of world trade fairs			
2	Select carefully the priority trade fairs to participate or support Myanmar exhibitors			
3	Make use of the opportunity of trade fairs for promotion of national branding			
4	Have a booth at every domestic trade fair and extend trade promotion services			
5	Develop standardized and attractive visual identify of display booth, brochure, etc.			
6	Enhance supports to exhibitors/participants			
7	Follow up the results of trade fairs			
8	Standardize and monitor domestic trade fairs			
9	Plan and organize a nation-level domestic trade fair for export promotion			

Note:  : Core activity period  : Continuation or follow-up period

3.3.5 Exporter/Overseas Buyer Service (One-stop Window)

Required Actions

General:

1) Publicize MTC and regional trade centers to attract more visitors

It is necessary to publicize MTC and regional trade centers taking every opportunities and possible means, for example, publicity at trade fairs and TTI training courses, distribution of brochures by overseas embassies, and promotion on Myantrade's website.

MTC and regional trade centers hold events such as a small trade fair, seminar, gathering of exporters and buyers, etc.

2) Examine the functions of regional trade centers and develop work flows of service for effective and efficient trade promotion services

It is necessary to standardize the function and work flows of regional trade centers with the assistance of MTC. The workflows and SOPs of the regional offices should be improved to be more effective and efficient.

3) Enhance the collaboration network among Myantrade, MTC and the regional offices

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

4) Enhance trade information service of regional trade centers by improving the information sharing

mechanism using the internet

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

Consultation and Advisory Service:

1) 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) 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.

3) 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 answers the inquiry in that case. It is necessary to develop a collaboration arrangement with related divisions of Myantrade, departments 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.

Inquiry and Business Matching Service

1) Advertise inquiry & business matching service on the website

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

2) 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) 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 Myantrade's inquiry and business matching service and distribute it for promotion of service to visitors to trade fairs, industry associations, embassies, etc.

4) 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) Follow up a business transaction after the introduction of potential business partners

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

6) Keep records of inquiries and responses as a digital data

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

Permanent Display

1) 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.

2) 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.

3) Plan display with specific theme/objective and periodically change the products

Periodical change of displayed products is 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.

Library

1) 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) 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) 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. For the effective management of library, necessary knowledge and skill as a librarian should be learnt.

4) 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.

5) 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 Myantrade's database.


Implementation Schedule

The implementation schedule of actions for exporter/ foreign buyer service is as shown in the following table.

Table 3-16: Implementation Schedule: Exporter/ Foreign Buyer Service

Exporter/Foreign Buyer Service				
Action		Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
General:				
1	Publicize MTC and regional trade centers to attract more visitors			
2	Examine the functions of regional trade centers and develop work flows of service for effective and efficient trade promotion services			
3	Enhance the collaboration network among Myantrade, MTC and the regional offices			
4	Enhance trade information service of regional trade centers by improving the information sharing mechanism using the internet			
Consultation and Advisory Service:				
1	Intensively train potential personnel by giving knowledge and skills required for consultation service			
3	Prepare data and information necessary for consultation service			
4	Build a collaboration relationship with other divisions in order to provide timely and adequate advice			
Inquiry and Business Matching Service				
1	Advertise inquiry & business matching service on the website			

2	Make use of the opportunity of trade fairs and incoming trade missions for business matching			
3	Prepare a manual and brochure of inquiry & business matching service			
4	Quickly respond to inquiries (to set a target time of response)			
5	Follow up a business transaction after the introduction of potential business partners			
6	Keep records of inquiries and responses as a digital data			
Permanent Display				
1	Prepare brochures of displayed products with photos, producer name, specifications, etc.			
2	Make the display more attractive with the help of expert			
3	Plan display with specific theme/objective and periodically change the products			
Library				
1	Clarify the target of library and make policies and plan of library on the basis of the needs of users			
2	Consider how to collect necessary books, statistics, directories, etc.			
3	Develop the library management system including collection management			
4	Develop e-library (PC + database) to give digital data of statistics, tariffs, regulations			
5	Furnish regional trade centers with a library similar to that of MTC			

Note:  : Core activity period  : Continuation or follow-up period

3.3.6 Exporter Development

Required Actions

1) Develop product experts at Myantrade who are in charge of hands-on guidance to potential exporters

It is important to develop a product expert for a product within Myantrade. 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) 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.

3) 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) Provide technical assistance to (potential) exporters in terms of product quality and product design

Myantrade dispatches technical experts and/or designers in order to develop or modify Myanmar products to be suitable for entry into overseas markets.

Myantrade dispatches designers to Myanmar exporters in order to support their product/package design with attractive design.

5) Implement a national branding campaign to promote Made-in-Myanmar product promotion

Myantrade selects best Made-in-Myanmar products and runs a campaign of those products on national branding. For example, Myanmar's tea and coffee has potential of establishing international reputation. Branding of specific product group or products of specific region/state can be a target of branding.

Myantrade provide consultation to Myanmar exporters on branding. Myantrade supports branding activities by Myanmar exporters.

6) Initiate programs for selecting excellent Myanmar export products such as the Myanmar Excellent Product Award and Myanmar Brand Mark

Myantrade initiates the Myanmar Excellent Product Award and Myanmar Brand Mark with the purpose of encouraging the product improvement by Myanmar producer s and make use of Myanmar Brand Mark as a tool of national branding activities. Awarded products are to be promoted by the national branding campaign.

7) Support the supply chain development of major export products

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

Myantrade also supports Myanmar exporters to acquire a certification or international standard of export products.

8) Support export marketing of exporters

Myantrade dispatches technical experts to exporters in order to improve their export promotion means, for example, website, company brochure, product catalogue, etc. Myantrade support exporters when they utilize e-commerce.

E-commerce is also one of areas of supports to export marketing by Myanmar exporters. Myantrade operates Myanmar Trade Portal and perform B2B, B2C and e-commerce activities for trade promotion.

9) Start a membership service for exporters and overseas buyers

Myantrade 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 Myantrade'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 Myantrade is the key tool for the membership service.

10) Periodically held a forum for Myanmar exporters

Myantrade organizes forums inviting associations, exporters and stakeholders in Yangon, NPT, and regions. The purposes of forum are to publicize the recent trade policies and Myantrade'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.

11) Increase practical curriculums of trade training

Myantrade collaborates with TTI to implement trade training for potential exporters. It is desirable to make the curriculums of TTI more practical in developing exporters. Myantrade in collaboration with TTI collects 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.

12) 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.

13) Expand training courses in regions

There are huge needs for training courses related to trade promotion and trade business. The regional offices of Myantrade have sometimes held 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 3-17: Implementation Schedule: Exporter Development

Exporter Development				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium

1	Develop product experts at Myantrade who are in charge of hands-on guidance to potential exporters			
2	Periodically identify potential exporters as the target of exporter development and to provide integrated support to them in order to realize their exports			
3	Strengthen the collaboration with associations for exporter development			
4	Provide technical assistance to (potential) exporters in terms of product quality and product design			
5	Implement a national branding campaign to promote Made-in-Myanmar product promotion			
6	Initiate programs for selecting excellent Myanmar export products such as the Myanmar Excellent Product Award and Myanmar Brand Mark			
7	Support the supply chain development of major export products			
8	Support export marketing of exporters			
9	Start a membership service for exporters and overseas buyers			
10	Periodically held a forum for Myanmar exporters			
11	Increase practical curriculums of trade training			
12	Design more variety of trade training courses including short-term courses			
13	Expand training courses in regions			

Note: ■: Core activity period ■: Continuation or follow-up period

Proposed Program for Exporter Development for Action 2

Integrated Exporter Development Program

Objective:

To train up prospective exporters and actualize their exports by providing advisory, intensive training and export marketing support during a project period (e.g., one year).

Activities:

(1) Selection of target companies

Myantrade selects target companies by evaluating their potential with the criteria and qualification.

(2) Provision of advisory

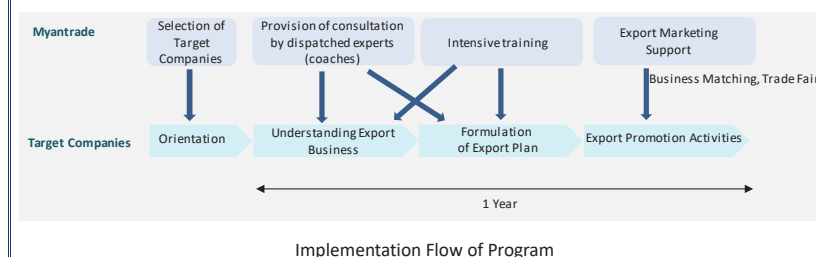
Instructors (coaches) periodically give face-to-face advice to the target companies. Instructors are Myantrade officials/staff, outside experts, lecturers, etc.

(3) Provision of intensive training

TTI, MTC and/or regional trade centers periodically provide intensive training to the target companies.

(4) Support to marketing

Myantrade provide export promotion supports such as business matching and trade fairs to the target companies.



Proposed Program for Exporter Development for Action 4

Product (Design) Development Support Program

Objective:

To support Myanmar exporters to develop or design products targeting overseas markets.

Activities:

(1) Selection of target companies

Myantrade selects target companies by evaluating their potential with the criteria and qualification.

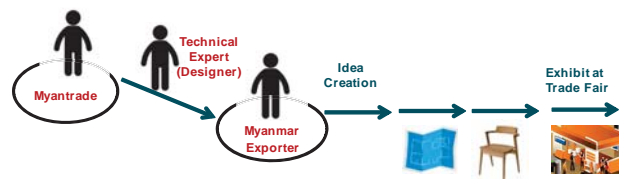
(2) Provision of technical experts and/or designers

Myantrade dispatches technical experts and/or designers to the selected target companies.

Technical experts and/or designers support the product (design) development of the target companies. The target companies develop mock-ups receiving the support.

(3) Follow-up support

Myantrade provides follow-up support to the commercialization and developed mock-ups by offering an opportunity of exhibiting at trade fairs, promoting in the national branding campaign, etc.



Implementation Flow of Program

Proposed Program for Exporter Development for Action 5

National Branding Program: Excellent Myanmar Products

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

Myantrade select Myanmar Excellent Products evaluating candidate products from the viewpoints of technical quality, design and sales service.

(2) Provision of privileges

Myantrade entitles the awarded products to use the Myanmar Brand mark.

Myantrade preferentially provides export promotion services to the awarded products.

(3) Publicity of Myanmar Brand

Myantrade promote the recognition of Myanmar Brand by various means of publicity.

(4) National branding

Myantrade utilizes the Myanmar Brand as a means of national branding activities.

Examples of
National Brand
Marks



Proposed Program for Exporter Development for Action 8

Support to Export Marketing by E-Commerce

Objective:

To promote e-commerce by Myanmar exporters.

Activities:

(1) Information Collection

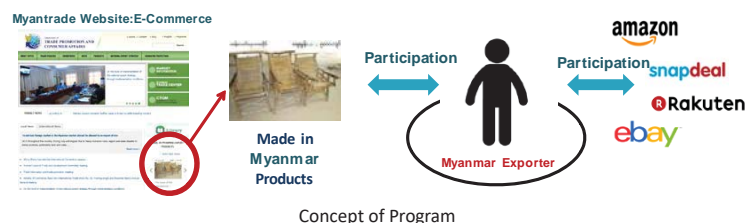
Myantrade collects information of current e-commerce and success cases. Myantrade also examines technical and legal issues of Myanmar exporters participating in international e-commerce. MOC prepares a guidebook on use of e-commerce for Myanmar exporters.

(2) Support to exporters

Myantrade provide advisory to Myanmar exporters which consider the use of e-commerce. MOC support Myanmar exporters to participate in international e-commerce or e-marketplace.

(3) Development of MOC's e-commerce site

MOC opens online exhibitions site on the Myantrade's website. The information of Myanmar products is uploaded to that site.



Concept of Program

3.3.7 Overseas Operation

Required Actions

1) 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 Myantrade 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) 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 Myantrade and commercial attachés.

3) 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) Give additional training to commercial attachés for trade promotion

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

5) Dispatch officers of Myantrade 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 Myantrade's officers to the priority countries to exclusively engage in trade promotion services.

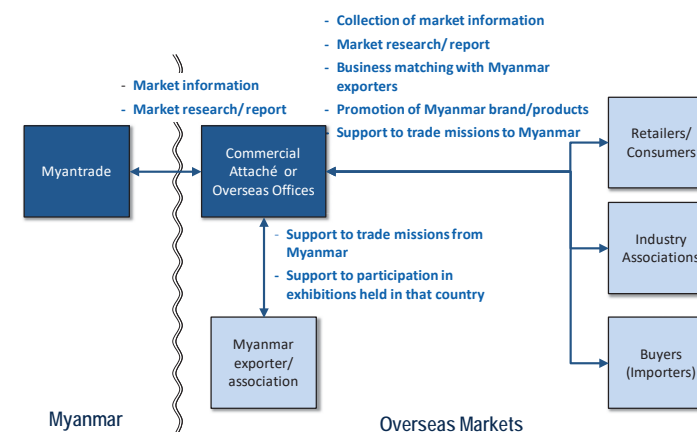


Figure 3-19: Functions and Tasks Which Overseas Offices Can Conduct

Implementation Schedule

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

Table 3-18: Implementation Schedule: Overseas Operation

Service of Overseas Office				
	Action	Phase 1 Quick-win	Phase 2 Short	Phase 3 Medium
1	Make use of commercial attaches for trade promotion services to Myanmar exporters and overseas buyers			
2	Review and redefine the role of commercial attaches for trade promotion in order to widen their activities			
3	Prepare and provide standard guidelines of activities for commercial attaches including market research and other trade promotion services			
4	Give additional training to commercial attaches for trade promotion			
5	Dispatch officers of Myantrade to the embassies in the priority target countries			

Note:  : Core activity period  : Continuation or follow-up period

Appendix 9:

Human Resources Development Plan for Myantrade



Human Resource Development Plan for Department of Trade Promotion (MYANTRADE)

January 2017

Japan International Cooperation Agency

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Appendix: Results of Training Needs Analysis

1 Background

1.1 Establishment of Myantrade

Myanmar Trade Promotion Organization (Myantrade) was established under the Ministry of Commerce (MOC) in April 2015 by reorganizing the Directorate of Trade Promotion and Consumer Affairs.

Myantrade, as a national trade promotion organization, assumes the responsibilities of developing exporters and expand national exports. Myantrade aims to formulate policies and provide export promotion services to Myanmar exporters, foreign buyers and other stakeholders with the purposes of:

- Facilitate export by matching Myanmar exporters and trade partners;
- Improve the competitiveness of Myanmar products and services and diversify Myanmar's exports;
- Develop overseas markets for Myanmar products and services for better market access; and
- Establish Myanmar brand in the global market

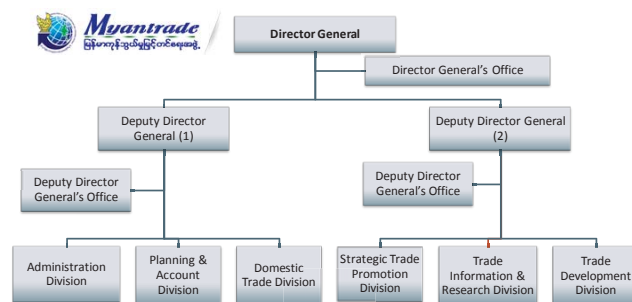


Fig. 1 Organization of Myantrade

The concept of Myantrade is originally initiated in the Trade Promotion Master Plan (TPMP) in 2012 and the establishment of Myantrade was included in the National Export Strategy (NES) as a priority action in 2014. Two roadmaps for the future development of Myantrade have been developed by donors' assistance as follows:

- JICA: The Project for Capacity Development of Trade Promotion in Myanmar Phase II, February 2016
- KOICA: Trade and Investment Policy Consultation and Establishment of a TPO in Myanmar, September 2016

Japan International Cooperation Agency has started the Project on Enhancement of Investment Promotion and Export Development in Myanmar in September 2016 with the

purpose of facilitating capacity development of Myantrade.

1.2 Bottlenecks of Myantrade for Good Trade Promotion Services

Myantrade currently has critical bottlenecks for its capacity of providing good trade promotion services.

- Level of trade promotion services of Myantrade compares unfavorably with that of other countries' TPOs. In actual, only a little meaningful export promotion services have been delivered to the actual users (exporters and potential exporters). Its services need largely improved both in terms of quantity and quality.
- The scope of services and their work flow have not been prepared for export promotion services. In relation, target beneficiary of promotion services is not clearly defined.
- The majority of Myantrade officers/ staff still have insufficient knowledge on export promotion services and international trade policies and trade business. In reality, they are occupied with administrative tasks or documentation which are not directly related to export promotion and exporter development.
- Infrastructure necessary for services is insufficient to provide a satisfactory level of services in terms of facilities, equipment, IT network, etc.
- Budget for the service is too limited to deliver the meaningful promotion services (even purchase a single booth of the exhibition/ trade fair).

JICA Project Team has conducted a training needs analysis based on the survey conducted in December 2016. Based on the results of TNA, both Myantrade and JICA Project Team find it necessary that Myantrade continuously organizes the training opportunity for its officers/ staffs to acquire the basic knowledge of export promotion services and international trade business as the necessary background of those engaged in a TPO.

2 Approaches for Capacity Development of Myantrade

Myantrade is at the great moment of change to turn out to be a true trade promotion organization (TPO).

Myantrade should change with noble mission and responsibilities. Myantrade should change its culture and way of work, away from long-established bureaucratic thinking.

Myantrade should be business-minded, performance-oriented and agile to offer quality trade promotion service through extensive capacity development.

2.1 What is Capacity Development

Capacity development can be defined as the process by which individuals, organizations, institutions, and societies develop abilities to perform functions and achieve objectives, according to the United Nation Development Program.

In other words, actual capacity development can be realized by approaching to individual level, organizational level, and institutional level collectively. And approaches to these three layers need to be interconnected in a systemic way based on the strategy of organization.



Fig. 2 What is Capacity Development

JICA's Roadmap for Trade Promotion has recommended the actions to be taken by the Myantrade, covering the improvements of i) organization, ii) management, iii) human resources management, iv) resource allocation, and v) enhancement of trade promotion services improvement. This is an integrated approach to capacity development as mentioned above.

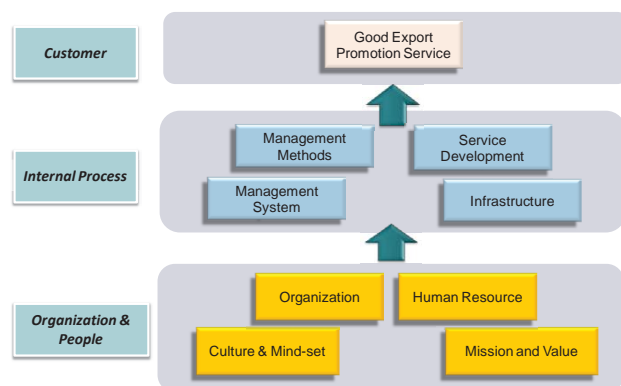


Fig. 3 Factors Related to Capacity Development

2.2 Approach to Capacity Development of Myantrade

Phases of capacity development

JICA's Roadmap consist of three phase of Myantrade development.

Phase 1: The period to build the capabilities of providing basic trade promotion

function (for immediate actions).

Target of Management

To improve the management system that enables the provision of basic trade promotion services. Basic management methods and tools are introduced and the intensive training on basic trade promotion service is implemented.

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).

Target of Management

To establish the management system that is common among other TPOs. 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: The period to realize the excellent level of trade promotion function that can be compared with the neighboring countries (for mid-term actions).

Target of Management

To further improve the management system that is by no means inferior to other TPOs. The management methods and tools are further refined and the capacity development for high-level trade promotion is conducted.

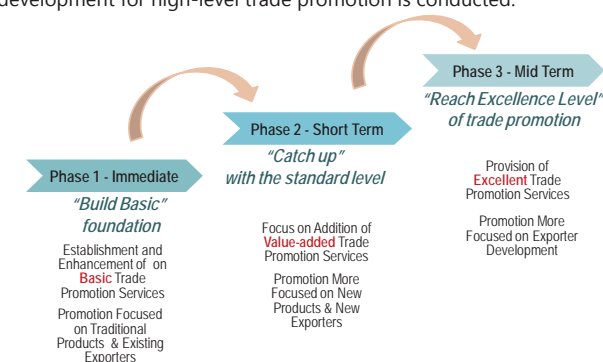


Fig. 4 Development Path of Myantrade

Components of capacity development for Myantrade

As defined in 2.1, capacity development covers the aspects of individual, organization, and institution. The capacity development of Myantrade proposed in JICA's road map is designed as interactive combination of enhancement of institution, management, service provision and human resource as shown in the figure below.

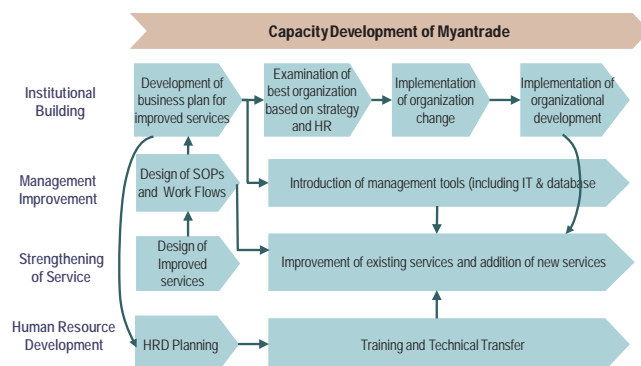


Fig. 5 Components of Capacity Development of Myantrade

Above all, human resource development is an indispensable and essential component of capacity development of Myantrade.

Among the actions for the improvement of human resources management, the Roadmap recommends that Myantrade shall formulate a training plan based on the training needs analysis, and conduct training for step-by-step capacity development according to the priority trade promotion services.

3 Human Resource Development of Myantrade

“People (human resource) ” is the core of Myantrade’s growth to be a true TPO. Future Myantrade is constructed by people, sustained by people, and driven by people.

Junior personnel will carry Myantrade 5 years after or 10 years after. Senior personnel will lead Myantrade 5 years after or 10 years after.

Myantrade should undertake comprehensive human resource development from a long-term perspective. Myantrade should continue efforts of human resource development in spite of difficulties such as budget and experience.

3.1 Concept of Human Resource Development

Human resource development (HRD) is the improvement of organizational and individual performance through training, organizational development and career development. HRD directly works upon individuals of organization in terms of competency, value, communication and mind-set to improve work performance and attain the objectives of organization.

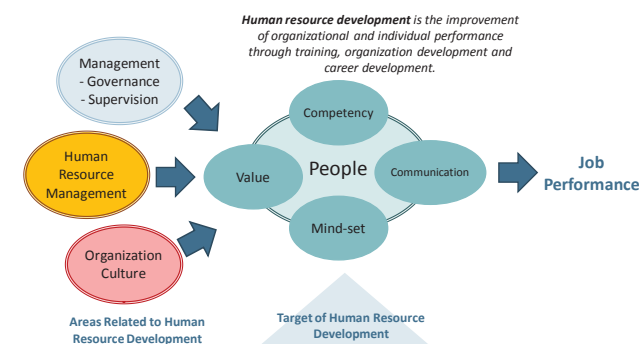


Fig. 6 Concept of Human Resource Management

3.2 Policies of HRD of Myantrade

The policies of HRD of Myantrade are:

- ✓ To develop competencies of human resource so that they can fully exert their potential to achieve both their own goals and the objectives of Myantrade:
- ✓ To raise self-confidence of individuals and support their self-realization:
- ✓ To create performance-oriented mind-set among individuals; and
- ✓ To create highly motivated and collaborative culture in Myantrade.

HRD in Myantrade shall be implemented focusing on developing potentials of individuals and supporting their growth as a member of Myantrade. Effective human resource can be achieved through the combination of the following measures:

- ✓ Formulation of career development plan
- ✓ Personnel allocation
- ✓ Training and education
- ✓ Organizational development
- ✓ Appraisal and promotion

3.3 Measures for HRD

Formulation of career development plan

There exist several restrictions for human resource management because Myantrade is a public institution as a department of the Ministry of Commerce. However, it is necessary to practice human resource management in order to develop individuals’ potentials to the maximum extent possible.

The following measures should be taken:

- ✓ To design standard career paths for officers and staff
- ✓ To make "a profile sheet" of an individual officer and staff
- ✓ To prepare a career development plan for an individual officer and staff

Personnel allocation

Personnel allocation is planned and implemented from the two perspectives, that is, a policy of "right person in the right place" and career development plan of personnel.

The following measures should be taken:

- ✓ To conduct job analysis and job design according to Myantrade's new functions
- ✓ To plan personnel allocation based on the needs of jobs and career development plans
- ✓ To implement job rotation according to career development plans

Training

The purpose of training and education is to improve competencies of officers and staff of Myantrade. A competency is the combination of knowledge, skill, attitude, etc. that are needed to successfully perform a job.

Skill and knowledge are easy to observe and measure. A skill is a learned ability and knowledge is acquired information in a particular field. On the contrary, philological and behavioral characters are less visible competencies.

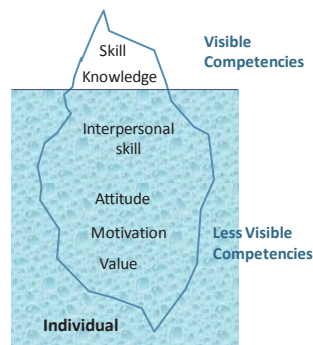


Fig. 7 Ice-berg Model of Competencies



Fig. 8 Core Competencies

Organizational Development

HRD should be supported by organizational development efforts of Myantrade. At the same time, HRD should facilitate the process of organizational development, i.e., a change of organization culture.

The following measures should be taken:

- ✓ To include organizational development aspect in training and education
- ✓ To introduce knowledge management and promote knowledge sharing
- ✓ To promote actual practice of what learned in training and education

The important thing is training is a starting point of organizational development as shown in the following model.

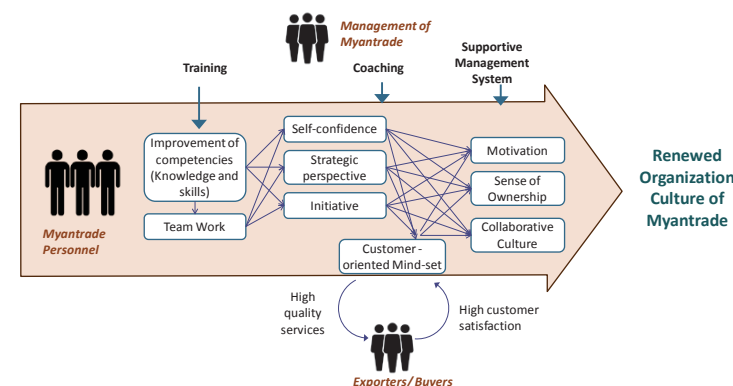


Fig. 9 Process of Organizational Development

Appraisal and Promotion

Result of HRD should be adequately and timely appraised.

The following measures should be taken:

- ✓ To conduct systematic evaluation of training and education (e.g. Kirkpatrick's Four-Level Evaluation Model)
- ✓ To introduce management-by-objectives method in Myantrade
- ✓ To implement adequate promotion of officers and staff who have improved competencies by training and education.

3.4 HRD System of Myantrade

Organization for HRD

Director General of Myantrade is responsible for

- (a) formulating an organization engaging in HRD
- (b) formulating policies for HRD of Myantrade
- (c) approving HRD Plan of Myantrade

(d) supervising the achievement of HRD Plan of Myantrade

Deputy Director General of Myantrade is responsible for

- (a) assisting the formulation HRD Plan of Myantrade
- (b) instructing and monitoring the implementation of HRD Plan of Myantrade
- (c) planning training programs of Myantrade
- (d) supervising training programs of Myantrade

Director of Administration Division

- (a) conducting training needs analysis
- (b) formulating HRD Plan of Myantrade
- (c) designing, implementing, and evaluating training program
- (d) conducting duties related to HRD

Process of HRD

HRD system of Myantrade should follow the process as shown in the following figure.

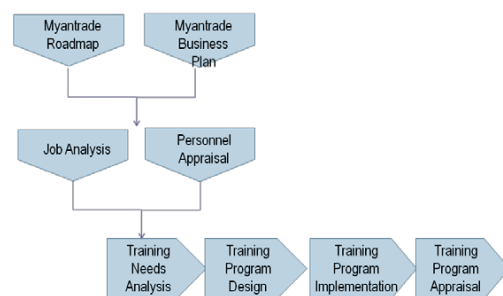


Fig. 10 Process of HRD

Method of Training

Training methods of Myantrade can be classified into three types:

- 1) On-the-Job Training
- 2) Off-the-Job Training
- 3) Self-learning

On-the-job training is a training conducted at work place. Off-the-job training is a training which is conducted at a site away from actual work environment. Self-learning is an individual's activity of developing oneself.

Table 1 Methods of Training

Method	Major Technique	Characteristics
On-the-Job Training	<ul style="list-style-type: none"> - Job instruction - Coaching - Manual 	<ul style="list-style-type: none"> - Contents of training are directly related to actual job. - Contents of training tend to be custom-made for individual trainees. - Trainers usually have enough experience. - Contents of training must be systematical organized for efficiency. - Trainees are usually motivated.
Off-the-Job Training	<ul style="list-style-type: none"> - Classroom lecture - Conference - Role playing - Simulation - Field tour 	<ul style="list-style-type: none"> - Training is not directly in the context of job. - It is adequate to provide knowledge to a larger number of trainees. - It is often formal and how to maintain trainees' motivation is an issue.
Self-learning	<ul style="list-style-type: none"> - Book reading - Test - e-learning 	<ul style="list-style-type: none"> - It is more flexible in time and place. - It is adequate to provide general knowledge. - How to maintain trainees' motivation is an issue.

4 Training Implementation Plan of Myantrade

HRD of Myantrade starts with training of personnel with the purpose of improving their competencies, i.e., knowledge, skills, and attitude. At the same instance, the perspectives of change in mind-set and career development should be stressed

Under constraints of budget and know-how, it is important to consider step-by-step training with priority and the use of outside resources and opportunities.

4.1 On-the-Job Training Program

Objective of training

The objective of on-the-job training is to provide practical knowledge and improve skills how to perform the job. It also aims to raise motivation of trainees.

On-the-job training of Myantrade should be conducted based on the management-by-objective (MBO) system.

Trainers' training is indispensable for on-the-training. Therefore, trainers training are conducted in advance.

Trainees

Target of on-the-job training are newly-recruited personnel and junior personnel. Personnel from other divisions also become target trainees with the purpose of widening their knowledge and skills.

Trainers

A director/deputy director of a division becomes a training coordinator and make schedule and assign necessary training.

Senior personnel are assigned as mentors of trainees and provide guidance to trainees.

Preparation of training materials

The following materials are prepared for on-the-job training:

- Work flows, job descriptions and job specifications;
- Job manuals;
- Trainees files
- Management-by-objective (MBO) sheet
- OJT plan for individual
- OJT monitoring sheet
- Trainers manual

Process of training

The process on-the-job training is as shown in the following figure. At the start, goals of training are set and a training plan is formulated for individual trainee. The achievement is monitored in the middle of training and goals and training plan are adjusted. At the end, the achievement of training is evaluated.

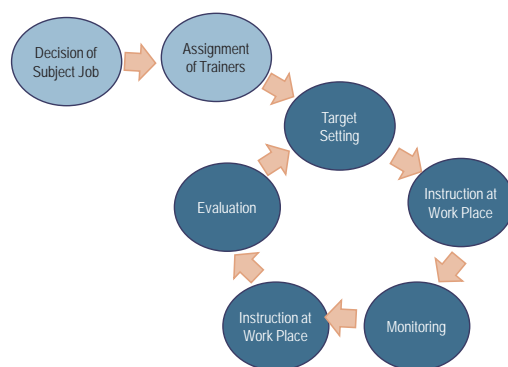


Fig. 11 Process of On-the-Job Training

Period of Training

The period of training depends on goals and contents of training needs.

An orientation training of new personnel is conducted within a short period, for example, one to several months. Introductory training of specific skill or procedure is also within a short period. On the contrary, training for mastering proficiency of a job at work place takes a longer period, for example, one year or more.

JICA Project Team will assist Myantrade to implement on-the-job training. Especially, JICA Project Team will provide guidance to the participants in pilot programs.

How to Implement

According to a purpose of training and target trainee, a responsible division becomes the administration division or a division to which a trainee works for. On-the-job training of Myantrade takes the following steps:

Step 1: Identify the needs of on-the-job training for individual officers and staff

A director identifies the gap between expected level of performance and displayed performance for individual officers or staff.

The director decides target trainees based on the above gap analysis

Step 2: Design appropriate on-the-job training for individual officers and staff

To examine appropriate training to improve their competencies to perform their jobs

To formulate training program for them including competencies to be developed, trainers (mentors), training period, indicators for evaluation

Step 3: Prepare necessary materials for on-the-job training

To prepare materials such as job description, job manual, evaluation sheet, etc.

Step 4: Set goals for on-the-job training

The director makes an interview with an individual trainee for good understanding by the trainee and consensus on goals

Step 5: Implement on-the-job training

The trainer provides hands-on instruction and advice to the trainee on how to perform the job

Step 6: Evaluate the result of on-the-job training at the middle of training

The director and trainee jointly evaluate the achievement of training at the middle of training. They discuss constraints of job, solution and adjust the goal of training.

Step 7: Continue on-the-job training

The trainer and trainee continue the training based on the modified plan

Step 8: Make final evaluation

The director, trainer, and trainee evaluate the result of training.

4.2 Off-the-Job Training Program

Objective of training

The objective of off-the-job training is to provide knowledge and skill on how to perform the job in the form of classroom lecture.

Trainees

All officers and staff of Myantrade.

Trainers

Trainers who have sufficient expertise necessary for a topic of training are selected. Trainers are from Ministry of Commerce including Trade Training Institute (TTI), other ministries, academics, private sector, donors, etc.

Types of program

Training programs on general subjects cover common knowledge and skill that Myantrade personnel should understand and utilize on daily work.

Training programs on specific subjects teach a field of special expertise that is used by personnel engaging in specific work.

Training programs for newly-appointed personnel are targeted to train newly-appointed personnel on trade promotion service rendered by a new unit.

The most common style of off-the-job is classroom lectures. The contents of classroom lectures should be not only one-way lectures but interactive lectures, discussions and group work with participatory approach.

Process

The process of off-the-training is as shown in the following figure.

At the first step, training needs are identified. At the second step, goals of training are set. At the next step, a training program is formulated so that it can achieve training goals. At the fourth step, a training program is implemented. Curriculums should be systematically organized to achieve training goals by arranging professional lecturers with knowledge and expertise in the given subject area. At the final step, the effectiveness of a training program is evaluated. The result of evaluation is used for planning of next training.

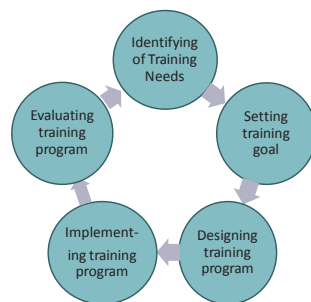


Fig. 12 Cycle of Training Program

Evaluation of a training program should be conducted according to the four steps of

Kirkpatrick's evaluation model.

Table 2 Kirkpatrick's Four-Level Evaluation Model

Step	Evaluation object	Evaluation method
1. Reaction (measurement of implementation result)	Evaluation of programs, made by trainees ✓ Evaluation of the instructor and the contents (mainly, subjective feeling of satisfaction)	Questionnaires and interview
2. Learning (measurement of understanding)	Evaluation of trainees' learning ✓ Evaluation of the contents, design, and instruction (mainly, objective understanding)	Questionnaires, interview, test, and self-check
3. Behavior (measurement of performance in workplaces)	Change in trainees' behavior after the program ✓ Evaluation of change in individuals' behavior, and utilization of leanings to workplaces	Interviews with trainees, supervisors, and observers, and comparison with previous data
4. Results (measurement of cost effect)	Positive effects of the change in behavior on organizations ✓ The extent to which the gaps in the specified needs are filled	Group interviews and Comparison with the previous data

Model Training Courses for Myantrade

Tentative training courses of Myantrade are as shown in the following table.

Table 3 Training Courses of Myantrade

Subject	Target Competency	Basic Subjects	Advanced Subjects
General Subject	Knowledge	Policies and plan of Myantrade Foreign trade policies of Myanmar Industrial policies of Myanmar Foreign trade procedures International business International marketing Trade promotion Corporate management	Policy making and planning of Myantrade Policy making on foreign trade Advanced foreign trade procedures Advanced international business Advanced international marketing Advanced trade promotion
	Technical skills	Basic IT skill Basic English Report writing	Advanced IT skill Advanced English, basic other languages Research skill
	Soft skills	Communication Team work	Leadership Strategic thinking Management Skill
Specific Subject	Knowledge & Skill	Basic market research Basic trade fair management Basic database management Basic website & network design and operation	Advance market research Advanced trade fair management Advanced database management Advanced website & network design and operation

		Basic trade representative	Advanced trade representative
Subject for newly-appointed personnel (Promotion Service)	Knowledge & Skill	Basic market information & research services	Advanced market information & research services
		Basic trade fair management	Advanced trade fair management
		Basic market development	Advanced market development
		Basic exporter development	Advanced exporter development
		Basic trade representative	Advanced trade representative

Training courses of **Trade Training Institute (TTI)** should be highly utilized for training of Myantrade. TTI's training on trade policies, trade practice, and international business is quite useful, especially for junior personnel. It is necessary for every officer and staff of Myantrade takes a course of TTI in order to acquire basic knowledge about trade practice and international business.

It is also recommended that Myantrade develop new training courses jointly with TTI for training courses that do not exist.

Target of training courses differs according to the year of experience and position of individual personnel. The basic concept of target participants is as shown in the following figure.

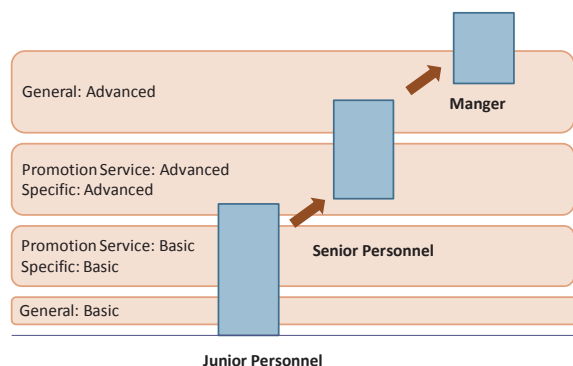


Fig. 13 Training by Echelon

Budget for Training

The biggest constraint of training is the budget. The budget of Myantrade is limited to conduct all the necessary training programs to its personnel.

The following measures should be taken to implement training courses as many as possible.

- 1) To utilize internal resource of lecturers, such as senior personnel and directors is utilized;
- 2) To utilize TTI training courses; and
- 3) To utilize opportunities of training offered by donors and other institutions.

JICA Project also conducts several training programs during the project period. At the dispatch

of participants to donors' training courses, it is necessary to nominate participants from individual capacity development plan.

How to Implement

The administration division is responsible for planning off-the-job training, i.e., lecture-style training courses.

Step 1: Identify the needs of off-the-job training

The administration division collects the information on the needs for training. .

It identifies training courses highly needed for improving the performance of Myantrade.

Step 2: Prepare an annual training plan for Myantrade

The administrative division, through the consultation with other division, formulates an annual of training courses. Training courses may be chosen from Table 3 or be newly designed according to the needs.

Step 3: Plan each training course in the annual training plan

The administration division decides a person in charge of each training course. A person-in-charge is not necessarily from the Administration Division.

The administration division allocates necessary budget for the training course.

The person-in-charge prepares curriculums and makes a plan of the training course including goals, candidate lecturer, number of participants, venue, date, etc.

Step 4: Prepare the training course

The person-in-charge decides participants, arranges lecturers and prepares teaching material, equipment, etc.

Step 5: Implement the training course

The course is implemented according to the plan.

Step 6: Evaluation of training course

The person-in-charge evaluates the course based on his/her observation, questionnaires from participants and evaluation by lecturers. The person-in-charge makes and submits a report of training course.

Step 7: Evaluation of the annual training plan

The evaluation of the training course is included in the report of the annual training plan. It is also utilized in planning of the next year annual plan.

4.3 Self-learning

Objective of training

Myantrade should encourage self-learning of officers and staff. Myantrade should provide supports to them by introducing learning materials, incentives, etc.

Type of subject

There are several subjects for self-learning of officers and staff of Myantrade. Above all, English is the most important subject for self-learning. English proficiency is generally low among Myantrade personnel. English is absolutely necessary skill for trade promotion services. Therefore, it is important to encourage Myantrade personnel to study English.

Encouragement of self-learning

It is one of measures for encouragement to carry out an English test to measure proficiency of personnel. Periodical coaching and/or short-term training also encourage self-learning of personnel.

How to Implement

Myantrade should encourage self-learning of English. The self-learning of English is promoted as follows:

Step 1: Find adequate learning tools for English learning

The administration division collects the information on learning tools for English. They include textbooks, on-line sites, podcasts, newspaper, magazines, etc.

It prepares a guide brochure of English learning considering steps of learning and proficiency level required for officers and staff of Myantrade.

Step 2: Evaluate the English proficiency level of officers and staff of Myantrade

The level of English proficiency is evaluated by self-assessment, test, and/or observation by superiors.

Step 3: Encouragement of self-learning of English

Myantrade encourages self-learning of English by providing a guide brochure on how to learn English.

Step 4: Encouragement of organizing a small group of learning by Myantrade personnel

Myantrade encourages a small learning group by several colleges to learn English together.

Step 5: Periodical evaluation of progress of self-learning

Myantrade periodically evaluate the improvement of English proficiency of officers and staff. It is also considered to give some incentive to self-learning.

Besides English, it is also important to promote a voluntary small group activity for self-learning, work improvement, etc.

5 Plan of HRD Program by JICA Project

JICA Project Team will support the capacity development and human resource development of Myantrade during the project period. The main purpose is to support Myantrade to build capabilities in providing basic trade promotion services.

5.1 Approach to HRD by JICA Project

HRD for Capacity Development of Myantrade by JICA Project

JICA Project Team plans to implement the capacity development of Myantrade on trade promotion.

As an organization level, JICA Project Team plans to revise the road map of Myantrade development. JICA Project Team also supports the institutional development of Myantrade. These activities include planning of business plan, organizational review, management system, etc.

As individual trade promotion level, JICA Project Team supports the design of service improvement, formulation of work flows and standard operating procedures, guidance to pilot project members for priority services.

JICA Project Team and Myantrade have selected the following services as subject priority services as immediate actions in the proposed roadmap:

- Exporters data management (exporters' profile database)
- Overseas market information/ data collection and provision
- Overseas market research/ study, exhibition/ trade fair management
- Strengthening of MTC and regional trade centers

As the following figure shows, HRD, i.e., training is an important component of capacity development activities of JICA Project. Without training, the capacity development of Myantrade cannot be achieved.

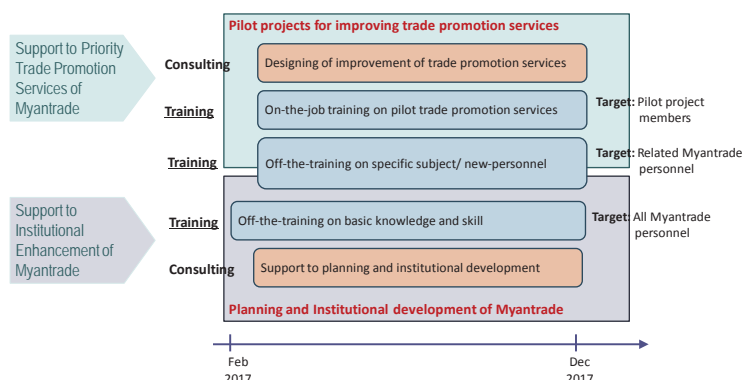


Fig. 14 Approach of Capacity Development by JICA Project

Types of Training for Myantrade by JICA Project

JICA Project Team plans to implement two types of training targeting Myantrade personnel in the Project.

General off-the-job training:

Classroom lectures on basic knowledge and skills targeting all Myantrade personnel with the purposes of sharing Myantrade mission and strategy, teaching knowledge of trade policies, basic international business, and trade promotion, improving basic technical skills and raising motivation of Myantrade personnel.

Off-the-job training for pilot projects:

Classroom lectures and/or workshops targeting mainly participants of pilot projects with the purpose of training on advanced/specific knowledge and skills that are necessary for the subject services.

On-the-Job Training for pilot projects:

Hands-on guidance is provided to participants of pilot projects on how to precede subject trade promotion services. Trainers (mentors) are JICA Project Team and senior members of Myantrade.

5.2 Plan of General Training Course on Basic Knowledge and Skills

Objectives

A training course on basic knowledge and skills is intended for all Myantrade personnel to acquire the basic understanding of international trade policies, export promotion services and trade procedure, as basic knowledge required for those engaged in a TPO.

Contents of training

A training course on basic knowledge and skills covers the following subjects:

Myantrade's strategy:	Myantrade's current strategy and plan, services, etc.
Trade policy:	Major trade issues of Myanmar, latest trade policies of Myanmar, National Export Strategy (NES), etc.
Trade Business:	Overview of trade practice/procedure, INCOTERMS, trade licensing, procedure, settlement, custom clearance, international marketing
Trade promotion services:	Roles and functions of TPO, lines of export promotion services, roadmap of Myantrade.

This training course is conducted as the following style.

Period:	3 days training
Venue:	Offices of MOC in Nay Pyi Taw, Yangon, Mandalay, etc.
Target participants:	Around 50 officers and staffs of Myantrade for each time

Time Schedule

JICA Project team plans to conduct a training course on basic knowledge and skills twice during the period from February to March 2017 with the budgetary support of JICA Project Team. One is in Nay Pyi Taw and the other is in Yangon.

5.3 Plan of Training under Pilot Projects for Trade Promotion Service

Objectives

JICA Project Team plans to organize and support pilot projects for improving/developing trade promotion services as mentioned above.

The priority trade promotion services identified for pilot projects are as follows:

- Exporters data management (exporters' profile database)
- Overseas market information/ data collection and provision
- Overseas market research/ study
- Exhibition/ trade fair management
- Enhancement of MTC and regional trade centers

Under the pilot projects, on-the-job training and off-the-job training are provided targeting Myantrade's participants of the pilot projects.

Time Schedule of Pilot Projects

The time schedule of implementing the pilot projects are as shown in the following figure.

The pilot projects start in March 2017. At this time, team members are selected and teams for pilot projects are formed. The implementation plans for pilot projects are formulated by the pilot project teams.

The pilot project teams implement the pilot project activities with the guidance of JICA Project Team. JICA Project Team conducts training course/workshop for pilot project members on advanced knowledge and skills specific to the subjects of pilot projects.

At the end of pilot project period in December 2017, the pilot project members and JICA Project Team evaluate the achievements of pilot projects.

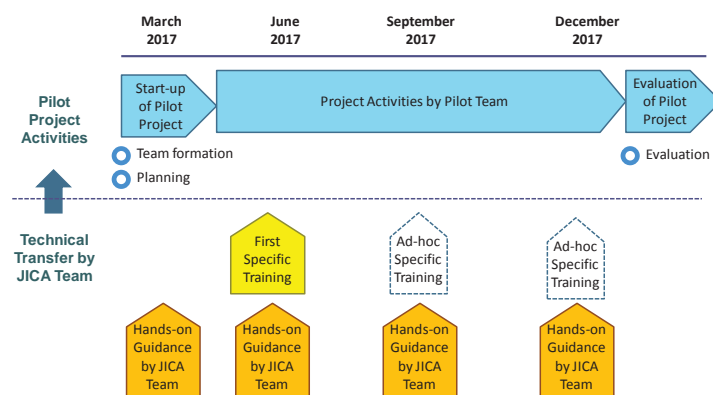


Fig. 15 Time Schedule of Pilot Project

Attachment: Result of Training Needs Analysis

Report of Training Needs Analysis of Myantrade

Objectives

JICA Project Team conducted the Training Needs Analysis (TNA) with the purposes of;

- 1) evaluating the current skill level of Myantrade personnel directly or indirectly provide trade promotion services to exporters and importers;
- 2) analyzing the capacity development needs (training needs); and
- 3) identifying the necessary training programs increase their capacity of performing their job and function of trade promotion.

Target of TNA

Officers and staff of Myantrade

Method of TNA

TNA was conducted from December 2016 until January 2017 in accordance with the following 4 steps:

Step 1: Preparation of Questionnaire:

The questionnaire sheet (attached at the end of report) was prepared by JICA Project Team and revised by the comments from Working Group of Myantrade.

Step 2: Distribution and Collection of Questionnaire:

The questionnaire sheet was distributed to officers and staff of Myantrade with the support from Myantrade and collected in December 2016.

Step 3: Group Discussion with Officers and Staff:

The group discussions were conducted with 8 divisions of Myantrade December 2016:

Step 4: Analysis of the Result of Questionnaire Survey and Group Discussions:

The results of the questionnaire survey and group discussions were analyzed from the following perspectives:

- Current level of basic skills
- Current level of specific knowledge/ skills related to export promotion
- Training needs to improve basic skills and specific knowledge/ skills
- Important export promotion services for Myantrade

Results of TNA

Response of questionnaire

The number of respondents to the TNA questionnaire was 152 which cover 80% of total 186 personnel of Myantrade. Among them, 23 are officers (Director, Deputy Director and Assistant Director) and 129 are staff.

Table 1: Number of Respondents to Questionnaire

Unit	Staff	Officer	Total
Administration Division	20	4	24
Planning & Finance Division	11	3	14
Domestic Trade Division*including 11staffs from 9 RTCs	42	2	44
Strategic Trade Promotion Division	19	4	23
Trade Information & Research Division	18	3	18
Trade Development Division	20	7	27
Total	129	23	152

Analysis of questionnaire

■ Current Level of Basic Skills

The self-evaluation by staff is shown in Fig. 1. In general, the staff of 40% to 58% among total evaluate their basic skills “medium”. And more than 30% of total consider their skills are “very low” or “low” for PC skills and English, i.e., “English speaking and listening (37%)”, “PC - excel and access (31%)”, “English reading and writing (31%)”, and “PC - Word and PowerPoint (30%)”. Around 20% of staff consider they have high or very high skill of “PC” and “general data processing”.

Fig. 2 shows the self-evaluation by the officers on current level of basic skill. Officers’ self-evaluation is much higher than staff. More than 65% of respondents answered “very high” or “high” for “report writing (78%)”, “general data collection (69%)”, and “general data processing (65%)”. For other skills, Answers of “very low” and “low” are less than 20% except “PC - excel and access (22%)”.

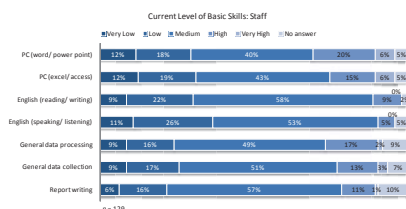


Fig. 1 : Officers' Evaluation of Level of Basic Skills

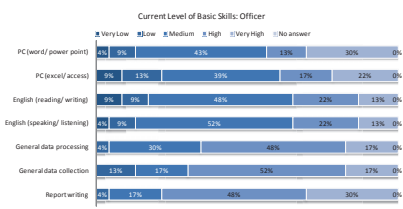


Fig. 2: Staff's Evaluation of Level of Basic Skills

■ Basic Skill Needs to Be Improved

The respondents chose three appropriate choices. Both the staff and officers give the first priority to “English speaking & listening ability” to be improved, followed by “English reading & writing”. PC-related skills and data collection & processing come next.

Training Needs for Basic Skills: Staff

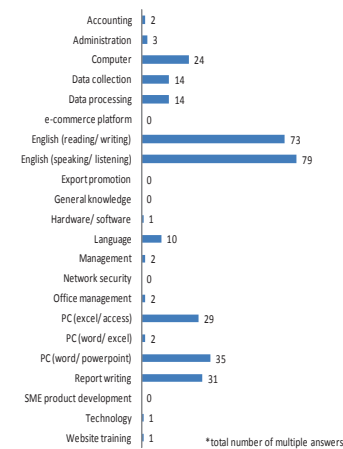


Figure 3: Training Needs for Basic Skills: Staff

Training Needs for Basic Skills: Officer

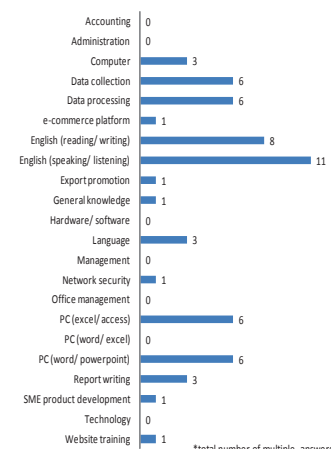


Figure 4: Training Needs for Basic Skills: Officers

■ Current Level of Specific Knowledge/ Skills

The respondents evaluated their own knowledge/ skills level in the following four categories: 1) trade-related knowledge, 2) export promotion skills, 3) specialized skills and 4) managerial skills, as shown below.

As for trade related-knowledge, the staff that answer ‘very low’ or ‘low’ range from 32% to 49% of total among the five types of knowledge. And those answering “high” or “very high” are 5% or less. On the contrary, the officers that answer “very low” or “low” are less than 20% for all types of knowledge.



Fig. 5: Evaluation of Specific Knowledge - Trade Related Knowledge

For specialized skills, around 50% of the staff answered “very low” or “low” for all types of skills. As for officers, 45% of respondents consider their skills are “high” or “very high” for “statistical processing and analysis” and “database design and management”. “Medium” is given by around 40% (35% - 43%) by both the staff and officers for all types.

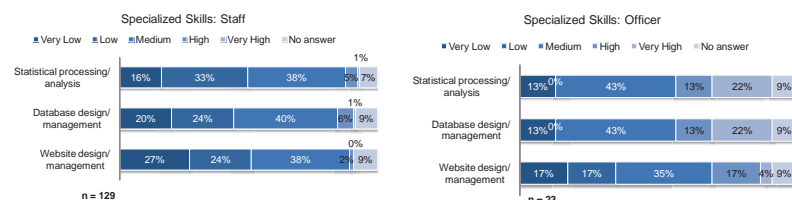


Fig. 6: Evaluation of Specific Knowledge - Specialized Skills

As for export promotion skills, the evaluation by the staff is “very low” or “low” for “trade matching (51%)” and “training design and management (51%)”. This ratio is lower for “market information collection (29%)”. The officers have more confidence in “market information collection”, “market information analysis” and “training design and management” because 39% of them answer “high” or “very high”. Less than 15% of officers answer “very low” or “low” for all types of skills.

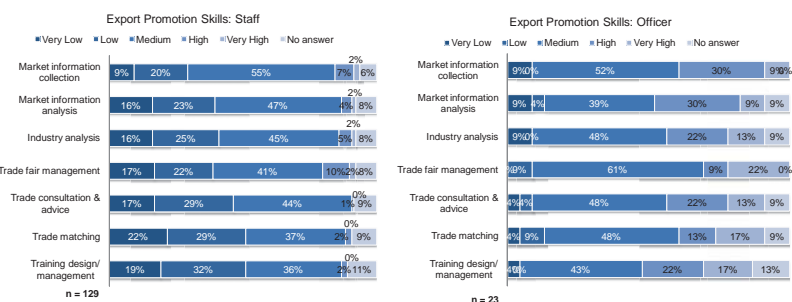


Fig. 7: Evaluation of Specific Knowledge - Export Promotion Skills

As for management skills, 41% of the staff answer “very low” or “low” for planning skill and 27% for project management skill. Only 8% of the officers consider their planning skill “very low” or “low” and 4% for project management skill.

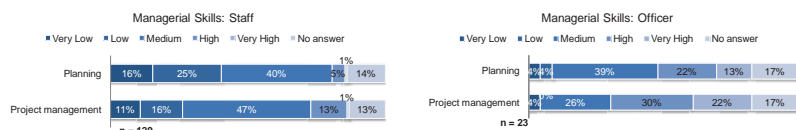


Fig. 8: Evaluation of Specific Knowledge - Managerial Skill

■ Specific Knowledge/ Skills Needed to Be Improved

The collected answers to a question asking ‘What Specific knowledge/ skills do you want to improve or acquire most?’ varied widely, and then JICA Project Team classified those answers into the nine categories as listed on the right.

Table 2: Classification of Specific Knowledge and Skills

Category	Sub Categories
Market information/ data collection/ provision:	Trade policy/ regulation/ standard
	Overseas market information/ data
	Data processing
Export marketing:	International market development
Market research/ study:	Market information research
	Market analysis
Trade procedure:	Trade related procedure/ knowledge
Exhibition/ trade fair:	Trade fair
Other important skills:	Website design/ management
	Project management
Protocol management:	Bilateral agreement
Product development/ adaptation:	Product development
Trade consultation/ inquiry service:	Trade consultation

The result of analysis is as shown in the figure below. “Market information/ data collection/provision” comes first, followed by “export marketing” in the second position and “market research/ study” for the third. A priority order for those needs is almost the same for both the officers and the staff.

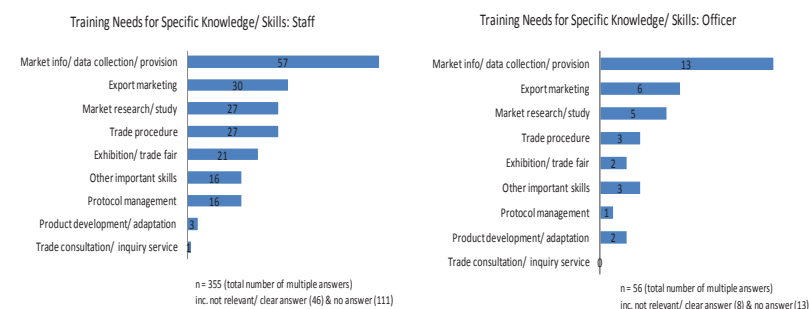


Figure 9: Training Needs for Specific Knowledge/Basic Skills: Staff

Figure 10: Training Needs for Specific Knowledge/Basic Skills: Officers

■ Important Export Promotion Services for Myantrade

The result of the question about important export promotion services for Myantrade is as shown in the following figure. The first place is “national branding for Myanmar product”, followed by “trade business consultation for exporters” and “provision of overseas market information”.

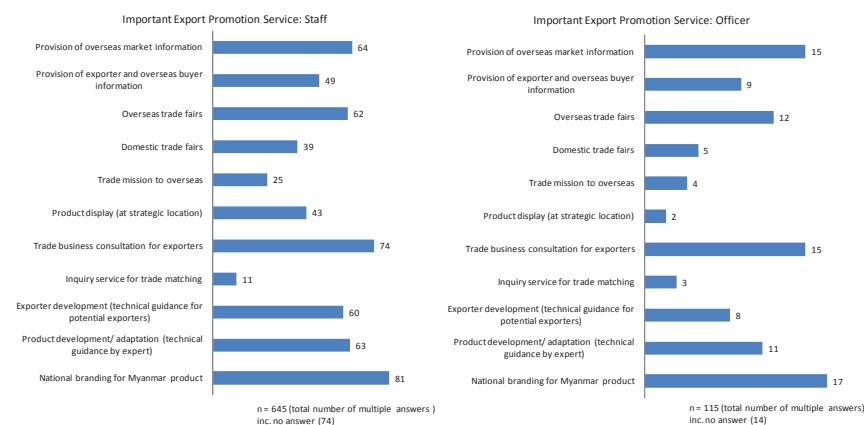


Figure 11: Important Export Promotion Services: Staff

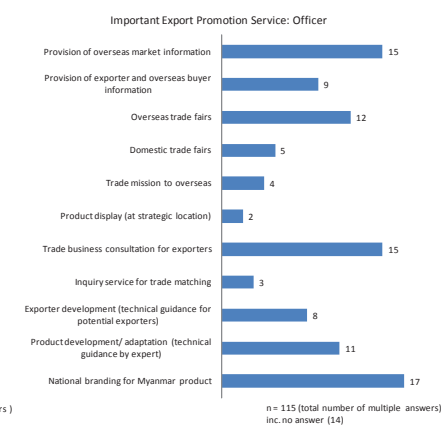


Figure 12: Important Export Promotion Services: Officers

Findings in Group Discussion and other remarks

The group discussion sessions were conducted for the following groups.

Table 3: Classification of Specific Knowledge and Skills

Division	No. of Participants
Strategic Trade Promotion Division	6 persons
Planning & Finance Division	5 persons
Trade Development Division	5 persons
Myanmar Trade Center (Yangon), Trade Development Division	11 persons
Trade Research & Information Division	5 persons
Domestic Trade Division	8 persons
Administration Division	5 persons
Secretariat National Export Strategy, Strategic Trade Promotion Division	6 persons

■ Basic Skills

Most participants in the group discussions expressed their insufficient ability of basic skills, English skills and data collection in particular. However, quite a few participants have no necessity of English ability at their daily work.

■ Specific Knowledge/ Skills

The participants recognize their specific knowledge and skills are still insufficient and need to be trained. They have difficulty in collecting/providing market information and data as instructed by their superiors and at the request of exporters and overseas buyers. Basic information and data on major exportable commodities/ overseas markets/ (potential) exporters has not been collected and provided in a systematic way. They consider that no database is available for export promotion service to exporters. In addition, a lack of infrastructure is a problem of their work.

■ Important Export Promotion Service

The participants can explain export promotion services or administrative tasks that they are engaging. However, quite a few participants in group discussions, especially the staff, could not explain clearly which specific knowledge/ skills they need to improve nor which export promotion services are important. In reality, they are occupied with assigned daily tasks as instructed by their superiors.

Questionnaire Sheet

The following questionnaire sheet was used for the questionnaire survey.

(1) For Reference Only

(2) Questionnaire for Assessment of Needs for Capacity Building

Objective:

The objective of this questionnaire is to assess your needs of building knowledge and skills necessary for competently implementing you tasks at Myantrade and analyze your answers for the purpose of capacity development plan, in view of enabling Myantrade to design, commence and deliver relevant trade promotion services.

A. Your Profile

a) Sex	:	<input type="checkbox"/> Male <input type="checkbox"/> Female
b) Age	:	<input type="checkbox"/> 29 or under <input type="checkbox"/> 30 - 39 <input type="checkbox"/> 40 - 49 <input type="checkbox"/> 50 or over
c) Academic background	:	<input type="checkbox"/> High-school/ Polytechnic <input type="checkbox"/> University (bachelor) <input type="checkbox"/> University (master or above)
d) Academic specialization	:	<input type="checkbox"/> Arts <input type="checkbox"/> Foreign language <input type="checkbox"/> Accounting <input type="checkbox"/> Business management <input type="checkbox"/> Law <input type="checkbox"/> Other social science <input type="checkbox"/> Natural science/ Engineering/ Medical/ Other science
e) Division/ Sub-division/ Center	:	Division: _____ Sub-division/ Center: _____ Your office location: _____
f) Status	:	<input type="checkbox"/> Manager/ Officer (Director, Deputy Director, Assistant Director) <input type="checkbox"/> Staff or others

B. Your Task

a) Please state your current tasks in your job description (up to 3 most important ones).	:	1) _____ 2) _____ 3) _____
b) Do you feel a gap between your knowledge/ skills and required level for your tasks?	:	For the above 1), <input type="checkbox"/> Yes largely <input type="checkbox"/> Yes but small <input type="checkbox"/> Not at all For the above 2), <input type="checkbox"/> Yes largely <input type="checkbox"/> Yes but small <input type="checkbox"/> Not at all For the above 3), <input type="checkbox"/> Yes largely <input type="checkbox"/> Yes but small <input type="checkbox"/> Not at all
c) Please state necessary knowledge/ skills to perform your tasks as required.	:	For the above 1), _____ For the above 2), _____ For the above 3), _____

C. Your Knowledge and Skills

	Level	1	2	3	4	5	
		Low		Medium		High	
a) Please assess your current level of BASIC skills. * Circle (○) the appropriate number which describes your current level for each item.	:	PC (word/ power point)	1	2	3	4	5
		PC (excel/ access)	1	2	3	4	5
		English (reading/ writing)	1	2	3	4	5
		English (speaking/ listening)	1	2	3	4	5
		General data processing	1	2	3	4	5
		General data collection	1	2	3	4	5
		Report writing	1	2	3	4	5
b) Which BASIC skills do you want	:	1) _____					

	to improve or acquire most? Please choose the best 3 among the above items.	:	2) _____ 3) _____ You may state others, if any. _____																																																																																																																																																																	
c)	Please assess your current level of SPECIFIC knowledge/ skills related to export promotion services. * Circle (○) the appropriate number which describes your current level for each item.	:	<table border="1"> <tr> <th></th> <th>Level</th> <th>1</th> <th>2</th> <th>3</th> <th>4</th> <th>5</th> </tr> <tr> <th></th> <th></th> <th>Low</th> <th></th> <th>Medium</th> <th></th> <th>High</th> </tr> <tr> <td colspan="7">Trade-related Knowledge</td> </tr> <tr> <td>Trading business/ procedure</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Multi/ bilateral trade agreement</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Trade-related regulations and standards</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Market of Myanmar's export products</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>International marketing</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td colspan="7">Specialized Skills</td> </tr> <tr> <td>Statistical processing/ analysis</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Database design/ management</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Website design/ management</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td colspan="7">Export Promotion Skill</td> </tr> <tr> <td>Market information collection</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Market information analysis</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Industry analysis</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Trade fair management</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Trade consultation & advice</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Trade matching</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Training design/ management</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td colspan="7">Managerial Skills</td> </tr> <tr> <td>Planning</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>Project management</td> <td></td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> </table>		Level	1	2	3	4	5			Low		Medium		High	Trade-related Knowledge							Trading business/ procedure		1	2	3	4	5	Multi/ bilateral trade agreement		1	2	3	4	5	Trade-related regulations and standards		1	2	3	4	5	Market of Myanmar's export products		1	2	3	4	5	International marketing		1	2	3	4	5	Specialized Skills							Statistical processing/ analysis		1	2	3	4	5	Database design/ management		1	2	3	4	5	Website design/ management		1	2	3	4	5	Export Promotion Skill							Market information collection		1	2	3	4	5	Market information analysis		1	2	3	4	5	Industry analysis		1	2	3	4	5	Trade fair management		1	2	3	4	5	Trade consultation & advice		1	2	3	4	5	Trade matching		1	2	3	4	5	Training design/ management		1	2	3	4	5	Managerial Skills							Planning		1	2	3	4	5	Project management		1	2	3	4	5
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d)	Which SPECIFIC knowledge/ skills do you want to improve or acquire most? Please choose the best 3 among the above items.	:	1) _____ 2) _____ 3) _____ You may state others, if any. _____																																																																																																																																																																	

D. Important Export Promotion Services for Myantrade

a)	For the benefit of exporters/ buyers, which export promotion service is more important as Myantrade activity? * Check at <input checked="" type="checkbox"/> for 3 most prioritized services.	:	<input type="checkbox"/> 1) Provision of overseas market information <input type="checkbox"/> 2) Provision of exporter and overseas buyer information <input type="checkbox"/> 3) Overseas trade fairs <input type="checkbox"/> 4) Domestic trade fairs <input type="checkbox"/> 5) Trade mission to overseas <input type="checkbox"/> 6) Product display (at strategic location) <input type="checkbox"/> 7) Trade business consultation for exporters <input type="checkbox"/> 8) Inquiry service for trade matching <input type="checkbox"/> 9) Exporter development (technical guidance for potential exporters) <input type="checkbox"/> 10) Product development/ adaptation (technical guidance by expert) <input type="checkbox"/> 11) National branding for Myanmar product <input type="checkbox"/> 12) Others, if any. _____
b)	What do you have (or want) to learn in order to engage in the above 3 prioritized promotion services?	:	Promotion service: _____ (fill-in the number you choose) Promotion service: _____ (fill-in the number you choose) Promotion service: _____ (fill-in the number you choose)

E. Comments, if any

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Thank you for your cooperation and time allocation

Appendix 10:

Report of Myantrade Seminar on Trade Business & Export Promotion

1 Report of Myantrade Seminar on Trade Business & Export Promotion in March 2017

1.1 Objective

The objective of this seminar is that officers and staff of Myantrade acquire basic knowledge necessary for their duties of trade promotion and understand direction of trade promotion enhancement.

1.2 Outline

The seminar covered the following topics:

Myantrade's strategy:	Myantrade's current strategy and plan, services, etc.
Trade policy:	Major trade issues of Myanmar, latest trade policies of Myanmar, National Export Strategy (NES), etc.
Trade business:	Overview of trade practice/procedure, INCOTERMS, trade licensing, procedure, settlement, custom clearance, international marketing
Trade promotion services:	Roles and functions of TPO, lines of export promotion services, roadmap of Myantrade.

1.3 Date and Place

The seminar was conducted during March 14 – 16, 2017 at the Ministry of Commerce, Nay Pyi Taw

1.4 Participants

56 participants in total attended the seminar: 51 officers and staff of Myantrade including 6 participants from Regional Trade Centers, and 5 participants from other department of MoC.

Organization	Division	Position	Number
Myantrade (NPT)	Administration Division	Officer	2
		Staff	4
	Planning & Account Division	Officer	2
		Staff	5
	Domestic Trade Division	Officer	1
		Staff	8
	Strategic Trade Promotion Division	Officer	3
		Staff	11
	Trade information & Research Division	Officer	2
	Trade development Division	Officer	2
		Staff	5
Regional Trade Center	Yarmanya Trade Center, Mawlamyine, Mon State	Officer	1
	Zwekapin Trade Center, Pha-an/ Kayin Region	Officer	1
	Zayyar Trade Center, Monywa, Sagaing	Officer	1
	Phankaharmyay Trade Center, Magway Region	Staff	1
	Kambawza Trade Center, Taunggyi, Shan State	Staff	1
	Yadanarbon Trade Center, Mandalay, Mandalay Region	Staff	1
Others	Minister's Office, Department of Trade, and Department of Consumer Affairs	Officer	5

1.5 Lectures

MoC officers, JICA experts and lectures from outside institutes.

1.6 Curriculums

The curriculums of the seminar are as follows:

First Day: March 14

Time	Subject	Contents	Instructor
09:00-09:30	Registration		
09:30-09:40	Opening Ceremony	- Opening remark	Director General of Trade Promotion (Myantrade)
09:40-09:45	Course guidance	- Course guidance	JICA Project Team Mr. Mishima
09:45-10:00	Photo session		
10:00-10:30	Session 1 Role of Myantrade	- Missions and functions of Myantrade - Myantrade's roles in national export development	Director General of Trade Promotion (Myantrade)
10:30-10:45	Coffee break		
10:45-12:00	Session 2 Trend of global/ regional trade and challenges to Myanmar trade	- Current trend of Myanmar trade and issues - Current situation of global/ regional trade and impact to Myanmar's trade performance including issues of AEC, FTA, GSP, etc. - Bottlenecks of Myanmar trade and necessary trade development	U Thein Myint Wai Assistant Director, TTI
12:00-12:45	Lunch		
12:45-14:15	Session 3 Overview of international trade flow and trade contract	- Overall international trade business flow - International trade documentary flow - Sales contract/ INCOTERMS	U Thein Lwin General Manager (retired), MoC
14:15-14:30	Coffee break		
14:30-16:15	Session 4 Trade licensing and shipping procedures	- Trade licensing system in Myanmar - Shipping procedures - Shipping documents (packing list, B/L, Certificate of Origin)	U Aung Khin Myint, Chairperson, Myanmar International Freight Forwarder's Association

Second Day: March 15

Time	Subject	Contents	Instructor
09:30-10:30	Session 5 Role and Function of TPO	- Trade-related institutions and position of TPO - Standard roles and functions of TPO - Historical development of TPOs in Asia - JICA's assistance to export promotion	JICA Project Team Mr. Tsubogo
10:30-10:45	Coffee break		
10:45-12:00	Session 6 Roadmap for enhancement of Myantrade	- Outline of roadmap - Necessary enhancement of each service - Needs of capacity development	JICA Project Team Mr. Mishima
12:00-13:00	Lunch		
13:45-14:30	Session 6 (continued)	Continued.	Mr. Mishima
14:30-14:45	Coffee break		
14:45-15:30	Session 7 Progress of NES	- Outline of NES - Progress of NES	Daw Thidar Win Htay Deputy Director, Strategic Trade Promotion Div., Myantrade
15:30-16:15	Session 8	-- Business matching	Daw Mya Mya Sein,

	Services of Myanmar Trade Center	<ul style="list-style-type: none"> - Consultation for exporters - Display - Collaboration with other divisions/ institutions 	Deputy Director, MTC, Trade Development Div., Myantrade
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Third Day: March 16

Time	Subject	Contents	Instructor
09:30-10:15	Session 9 Capacity Development of Myantrade	<ul style="list-style-type: none"> - Result of training needs analysis - Necessary knowledge and skills for trade promotion 	JICA Project Team Ms. Tanaka
10:15-10:30	Coffee break		
10:30-12:00	Session 10 Export marketing plan	<ul style="list-style-type: none"> - Competitive advantage - Marketing mix: product, price, place, promotion - Market research activities - How to support exporters' market plan by MoC 	U Myo Min, CEO & President, PS Business School
12:00-13:00	Lunch		
13:00-15:00	Session 11 Group discussion	<ul style="list-style-type: none"> - Orientation of case work - Discussion - Preparation of presentation 	Facilitated by U Myo Min
15:00-15:15	Coffee break		
15:15-16:00	Session 12 Presentation	<ul style="list-style-type: none"> - Presentation of case work - Evaluation 	Facilitated by U Myo Min
16:00-16:15	Closing	<ul style="list-style-type: none"> - Overall review of seminar - Certificate handover - Closing remark 	Myantrade Deputy DG

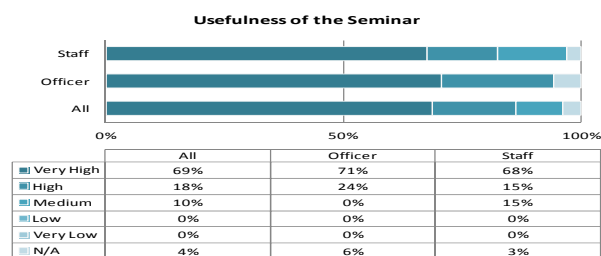
Each session includes Q&A session.

1.7 Post Evaluation

In order to obtain participants' feedback for better implementation of the seminar, post evaluation was conducted through a questionnaire survey. The JICA Project Team obtained the answers from 91% of the all participants (51 answers out of 56 participants: 17 officers and 34 staff).

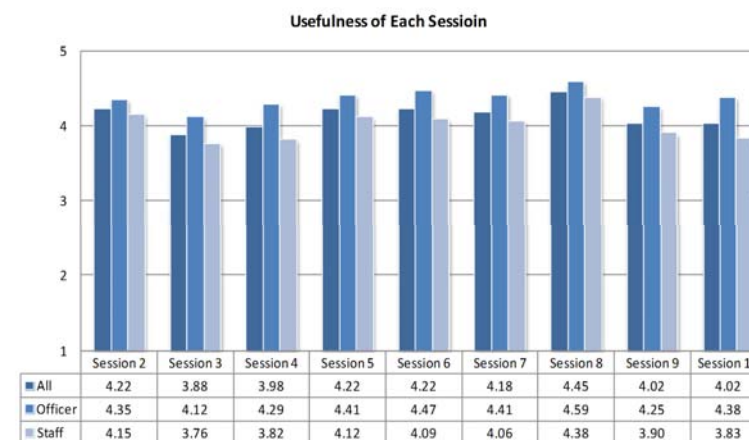
a. Overall evaluation

As for usefulness of the seminar in general, 69% of the participants answered "very high" and 18% answered "high". Regarding the lower evaluation by the staff compared to the officers, it is conceivable that the staff, especially the young staff, hardly follow/ understand well the contents of the lectures since some topics are still new and unfamiliar to them.



b. Evaluation of each session

A figure below shows the average score of the participants' evaluation on usefulness of each session, ranging from 1: very low to 5: very high. "Session 8: Services of Myanmar Trade Center" obtained the highest reputation by both the officers and the staff. As we received suggestions from the participants in the later question (d), more time and a pre-distribution of lecture materials, in particular the materials on unfamiliar/ difficult topics to the young staff such as session 3 and 4, are needed to promote an understanding of the young staff.



c. Needs for additional learning

The most requested topic that the participants want to learn more is "Session 8: Services of Myanmar Trade Center". In contrast to the officers, it seems that a further learning on Roadmap for enhancement of Myantrade (Session 6) is needed for the staff. Some staffs consider that they need to improve their general knowledge & skill, such as language ability and PC skill.

Topics	Officer	Staff
Session 2	3	2
Session 3	1	1
Session 4	2	6
Session 5	3	5
Session 6	1	7
Session 7	1	4
Session 8	4	8
Session 9	-	-
Session 10	3	2
Data collection	-	1
Language	-	3
Logistics	1	-
PC	-	1
Supply-chain management	1	-
Tourism development	-	1
Trade fair	-	3
Trade procedure	-	1
Web development	-	1
Total	20	46

*total numbers of multiple answers

d. Suggestions for future seminar program

The comments about the implemented seminar and the suggestions for future programs obtained through the questionnaire survey are as below:

- Insufficient time, need more time especially for young staff to understand clearly.
- Need more time on trade promotion related topic.
- More discussion/ activity-oriented session.
- Expect to join the similar seminars in the future
- Expect more seminars like this for RTCs

2 Report of Myantrade Seminar on Trade Business & Export Promotion in June 2017

2.1 Objective

The objective of this seminar is that officers and staff of Myantrade acquire basic knowledge necessary for their duties of trade promotion and understand direction of trade promotion enhancement.

2.2 Outline

The seminar covers the following topics:

Myantrade's strategy:	Myantrade's current strategy and services, and planning of regional trade promotion
Trade business:	Overview of trade practice/procedure, INCOTERMS, trade licensing, procedure, settlement, custom clearance, international marketing
Trade promotion services:	Roles and functions of TPO, lines of export promotion services, roadmap of Myantrade
Market research:	Step and method of basic market information collection and market research

2.3 Date and Place

21-23 June 2017, at the Trade Training Institute (TTI), 4th Floor, the Ministry of Commerce

2.4 Participants

44 participants in total attended the seminar: 26 officers and staff of Myantrade including 12 participants from Regional Trade Centers (5 participants who attended the seminar in NPT in March also joined the sessions on the last day), and 6 participants from other department of MoC.

Organization	Division	Position	Number
Myantrade (Yangon)	Administration Division	Staff	3
	Domestic Trade Division	Officer	1
		Staff	1
	Strategic Trade Promotion Division	Staff	3
	Trade information & Research Division	Officer	4
		Staff	4
Myantrade (NPT)	Trade development Division	Officer	2
		Staff	6
Myantrade (NPT)	Planning & Account Division	Officer	1
	Strategic Trade Promotion Division	Officer	1
Regional Trade Center	Domestic Trade Division, Hanther Trade Center, Pyay, Bago Region	Staff	3
	Domestic Trade Division, Ayeyar Trade Center, Patheingyi, Ayeyarwaddy Region	Staff	1

*only for the sessions on the last day	Domestic Trade Division, Kandaryawaddy Trade Center, Loikaw, Kayah State	Staff	1
	Domestic Trade Division, Thazinmyay Trade Center, Sittwe, Rakhkhaing State	Staff	2
	Domestic Trade Division, Yarmanya Trade Center, Mawlamyine, Mon State	Officer	1
	Domestic Trade Division, Zwekapin Trade Center, Pha-an/ Kayin Region	Officer	1
	Domestic Trade Division, Zayyar Trade Center, Monywa, Sagaing	Officer	1
	Domestic Trade Division, Phankaharmyay Trade Center, Magway Region	Staff	1
	Domestic Trade Division, Yadanarbon Trade Center, Mandalay, Mandalay Region	Staff	1
Others	Department of Trade	Officer	3
	Department of Consumer Affairs	Officer	1
		Staff	2

2.5 Lectures

MoC officers, JICA experts and lectures from outside institutes.

2.6 Curriculums

The curriculums of the seminar are as follows:

First Day (21 June, Wednesday):

Time	Subject	Contents	Instructor
09:00-09:30	Registration		
09:30-09:45	Opening remark	- Opening remark-1 - Opening remark-2	U Aung Soe, DG-Myantrade or his appointed DDG JICA Myanmar Officer
09:45-09:50	Course guidance	- Course guidance	JICA Team, Mr. Mishima
09:50-10:00	Photo session		
10:00-10:30	Session 1 Role of Myantrade	- Missions and functions of Myantrade - Myantrade' roles in national export development	U Aung Soe, DG-Myantrade or his appointed DDG
10:30-10:45	Coffee break		
10:45-12:00	Session 2 Trend of global/ regional trade and challenges to Myanmar trade	- Current trend of Myanmar trade and issues - Current situation of global/ regional trade and impact to Myanmar's trade performance including issues of AEC, FTA, GSP, etc. - Bottlenecks of Myanmar trade and necessary improvement of trade environment/ promotion	U Thein Myint Wai, Assistant Director, TTI
12:00-12:45	Lunch		
12:45-14:15	Session 3 Overview of international trade flow and trade contract	- Overall international trade business flow - International trade documentary flow - Sales contract/ INCOTERMS	U Thein Lwin, General Manager (retired), MoC
14:15-14:30	Coffee break		
14:30-16:15	Session 4 Trade licensing and shipping procedures	- Trade licensing system in Myanmar - Shipping procedures and documents (packing list, B/L, Certificate of Origin) - Myanmar's logistic modal/ infrastructure/ issues	U Aung Khin Myint, Chairperson, Myanmar International Freight Forwarder's Association

Second Day (22 June, Thursday):

Time	Subject	Contents	Instructor
09:30-10:30	Session 5	- Trade-related institutions and position of TPO	JICA Project Team

	Role and Function of TPO	<ul style="list-style-type: none"> - Standard roles and functions of TPO - Historical development of TPOs in Asia - JICA's assistance to export promotion 	Mr. Tsubogo
10:30-10:45	Coffee break		
10:45-12:00	Session 6 Roadmap for enhancement of Myantrade	<ul style="list-style-type: none"> - Outline of roadmap - Necessary enhancement of each service - Needs of capacity development 	JICA Project Team Mr. Mishima
12:00-13:00	Lunch		
13:00-14:30	Session 6 (continued)	Continued.	Mr. Mishima
14:30-14:45	Coffee break		
14:45-15:15	Session 7 Needs of capacity building of Myantrade	<ul style="list-style-type: none"> - Result of training needs analysis - Necessary knowledge and skills for trade promotion 	JICA Project Team Ms. Tanaka
15:15-16:15	Session 8 Basics of trade information collection & research	<ul style="list-style-type: none"> - Current condition of trade information collection/ research activity of Myantrade - Outline of Trade Map training - Basic method for trade information collection 	Mr. Kaung Htut Aung, Myanmar Trade Center

Third Day (23 June, Friday):

Time	Subject	Contents	Instructor
09:30-12:00 Including coffee break	Session 9 Export marketing plan	<ul style="list-style-type: none"> - Competitive advantage - Marketing mix: product, price, place, promotion - Market research activities - How to support exporters' market plan by MoC 	U Myo Min, CEO & President, PS Business School
12:00-13:00	Lunch		
13:00-15:00	Session 10 Case work by group	<ul style="list-style-type: none"> - Orientation of case work for planning regional trade promotion - Discussion - Preparation of presentation 	Facilitated by U Myo Min
15:00-15:15	Coffee break		
15:15-16:00	Presentation	<ul style="list-style-type: none"> - Presentation of case work of a regional trade promotion plan - Evaluation 	Facilitated by U Myo Min
16:00-16:15	Closing	<ul style="list-style-type: none"> - Overall review of seminar - Certificate handover - Closing remark 	Myantrade Deputy DG

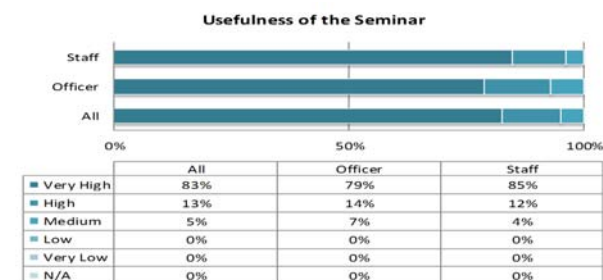
Sessions 2 ~ 8 includes Q&A session.

2.7 Post Evaluation

In order to obtain participants' feedback for better implementation of the seminar, post evaluation was conducted through a questionnaire survey. The JICA Project Team obtained the answers from 90 % of the all participants (40 answers out of 44 participants: 14 officers and 26 staff).

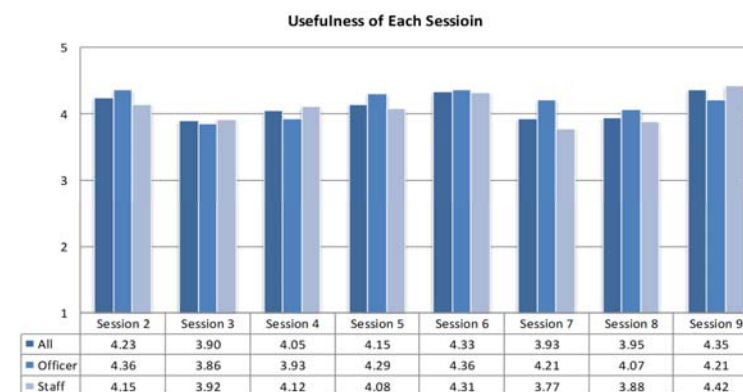
a. Overall evaluation

As for usefulness of the seminar in general, 83% of the participants answered "very high" and 13% answered "high".



b. Evaluation of each session

A figure below shows the average score of the participants' evaluation on usefulness of each session, ranging from 1: very low to 5: very high. As we received suggestions from the participants in the later question (d), more time and a pre-distribution of lecture materials, in particular the materials on unfamiliar/ difficult topics to the young staff such as session 3 and 4, are needed to promote an understanding of the young staff.



c. Needs for additional learning

The most requested topic that the participants want to learn more is "Session 9: Export marketing plan". Some officers want to learn more about "Role and Function of TPO (Session 5)".

Topics	Officer	Staff
Session 2	1	1
Session 3	-	4
Session 4	1	1
Session 5	4	1
Session 6	1	1
Session 7	-	1
Session 8	2	2
Session 9	7	10
Session 10	-	-
Computer	-	1
Management	-	1
Promotion services	1	-
Trade Information	-	1
Total	17	24

*total numbers of multiple answers

d. Suggestions for future seminar program

The comments about the implemented seminar and the suggestions for future programs obtained through the questionnaire survey are as below:

- Insufficient time, need more time especially for young staff to understand clearly.
- More discussion and practical exercises.
- Expect more seminars like this

3 Questionnaire Sheet for Post Evaluation

The following questionnaire sheet was used for the questionnaire survey.

Questionnaire on Myantrade Seminar of Basic Knowledge of Trade Promotion

A. Your Profile

a)	Name	:	
b)	Sex	:	<input type="checkbox"/> Male <input type="checkbox"/> Female
c)	Age	:	<input type="checkbox"/> 29 or under <input type="checkbox"/> 30 - 39 <input type="checkbox"/> 40 - 49 <input type="checkbox"/> 50 or over
d)	Division/ Sub-division/ Center	:	Division: _____ Sub-division/ Center: _____
f)	Status	:	<input type="checkbox"/> Officer <input type="checkbox"/> Staff or others

B. Sessions in Seminar

		Level	1 Low	2	3 Medium	4	5 High
a)	Please assess usefulness of each session. * Circle (○) the appropriate number which describes your assessment.	Overall seminar	1	2	3	4	5
		Session 2: Trend of global/ regional trade and challenges to Myanmar trade	1	2	3	4	5
		Session 3: Overview of international trade flow and trade contract	1	2	3	4	5
		Session 4: Trade licensing and shipping procedures	1	2	3	4	5
		Session 5: Role and Function of TPO	1	2	3	4	5
		Session 6: Roadmap for enhancement of Myantrade	1	2	3	4	5
		Session 7: Progress of NES	1	2	3	4	5
		Session 8: Services of MTC	1	2	3	4	5
		Session 9: Results of Training Needs Analysis	1	2	3	4	5
		Session 10: Export marketing plan	1	2	3	4	5
b)	What do you want to learn more or additionally?	:					
c)	What do you suggest if necessary to improve the seminar?	:					

C. Comments, if any

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Thank you for your cooperation.

Appendix 11:

Implementation Report of Pilot Activities for Myantrade

Implementation Report of Pilot Activities for Myantrade

1. Introduction of the Pilot Activities

1.1 Background of the Pilot Activities

Myantrade, Department of Trade Promotion in the Ministry of Commerce (MoC), has performed such limited functions and services of export promotion as export data collection and trade fairs (sponsored by the other countries or donors). To perform as a true export promotion organization, Myantrade needs to improve the existing functions and initiate new ones in accordance to its mission statements, exporters' expectation, and the Roadmap for Export Promotion. To start functional development of Myantrade, the JICA Project Team entered a consensus of implementing technical assistance for those identified functions as most important on a pilot basis, and has organized a series of discussion with the relevant officers/ staffs of Myantrade to plan the pilot activities, since January 2017.

1.2 Subject Functions of the Pilot Activities

At first, both Myantrade and JICA Project Team identified the subject functions for the pilot activities in terms of the following considerations:

- Functions that Myantrade places its priority on, and TPOs in other countries begun with upon their establishment,
- Functions that the existing officers/ staffs of Myantrade could handle with ease,
- Functions that would be basis for preparing/ commencing the new programs,
- Functions that would contribute to Myantrade's focused agenda.

As a result, the following functions are raised as subjects for pilot activities and agreed by the Myantrade (Director General). Subject functions are deemed basic but most essential for Myantrade to prepare for performing as an export promotion agency.

Subject functions for the pilot activities

Function	Explanation	Reason for identification
Overseas Market Information/ Data Collection	Collection of information/ data on market requirement/ regulation, product standards, tariff, etc.) and preparation of information database	Many inquiries from exporters are concerned with legal systems and standards of destination markets. It is important to prepare information system that makes Myantrade able to promptly respond to such inquiries from exporters, through preparing the database.
Exporters Database Development	Collection of exporter's (including potential one) profiles and construction of database	It is a basic data to be held/ updated by TPOs to introduce the promising exporters (suppliers) to inquiries from foreign buyers. Exporter's profiles would be also the basic information when Myantrade prepare for development/ operation of the export promotion services/ support programs in the future.
Market Research	Capacity building of overseas market research with focus on the specific country/ product	This is one of the basic competencies required for officers/ staffs of TPOs, and one of the expected functions by the exporters.
Trade Fair Management	Capacity building for effective preparation/ operation of trade fairs	This is one of the basic competencies required for officers/ staffs of TPOs, and one of the expected functions by the exporters.
Exporter/ Importer Support Service	Activities for enhancing familiarity of exporters to Myanmar Trade Center/ Regional Trade Centers and capacity building of planning of knowledge-dissemination events for exporters	Both MTC and RTCs have to play more critical roles for exporters (including potential ones) in the field of inquiry/ consultation service, market/ other information provision, facilitation for their market access. However, familiarity of MTC/ RTCs is deemed still low among the exporters.

1.3 Preparation of the Pilot Activities

Myantrade and the JICA Project Team decided that the pilot activities be proceeded from March 2017 to December 2017 (later extended to February 2018). After the subject functions for pilot activities were confirmed, the counterpart team (the Working Groups) was appointed for each subject function. Those Working Groups (WGs) comprises of one supervisor and one leader, and several members.

The JICA Project Team then commenced a series of discussion from March 2017 to design the pilot activities more concretely with each WG while confirming the schedule and necessary resources for these activities, and commenced implementation of the pilot activities for each function from May 2017. It is noted that a pilot activity for the overseas market information/ data collection was integrated into that for market research. This was because sufficient number of officers/ staffs were not assigned for these two activities and these activities have a certain similarity in the contents.

The sections below record the implementation of the pilot activities for each function.

2. Record of Pilot Activity Implementation

2.1 Exporters' Database Development

2.1.1 Objectives and activities

The objectives of this pilot activity are:

- To collect information of Myanmar exporters (suppliers) and develop their database,
- To utilize the database for inquiries from overseas buyers for the future matching service, etc.

The following activities are scheduled for implementation on a pilot basis:

- Format design of the exporter's profile,
- Planning of exporter information collection,
- Implementation of exporter information collection,
- Design of exporters database and compilation of those collected information into the database,
- Utilization of the database for the purpose of preparation/ operation of export promotion services,
- Establishment of a mechanism of periodical update of the database.

2.1.2 Working Group members

The members of this WG is assigned as follows.

Position	Name	Division
Supervisor	Dr. Htein Lynn	Division of Strategic Investment Promotion
Team Leader	Mr. Tun Naing	ditto
Team Members	Mr. Tun Win	ditto
	Mr. Thura	ditto
	Ms. Khin Nandar Myo	ditto
	Mr. Ye Lin Htet	ditto

2.1.3 Position of JICA Project Team

The JICA Project Team was expected to give guidance/ advice to the WG members on how to design the profile format, and collect exporter information, and to technically support database design. No

financial assistance was presumed for this activity.

On the other hand, Myantrade was expected to assign its officers/ staffs for activity implementation during the course, and prepare travelling expense for distributing the questionnaire formats and collecting the exporter's profiles.

2.1.4 Conducted activities

The scheduled activities have been conducted, as explained below.

Format design of the exporter's profile

The JICA Project Team advised the WG members to collect the following information/ data to obtain exporter's profiles, and the WG designed the profile format accordingly.

Information/ data to be obtained for exporter's profile

Category	Item
General Information/ Company Outline	Company name
	Address
	Telephone/ fax number
	E-mail
	Website
	Primary contact for sale/ inquiry
	Year of Establishment
	Type of business
	Capital amount
	Number of employee
	Annual sales
	Company registration number (DICA)
Product	ISO/ other certificates or standards
	Products with brief description of main product when necessary
	Exporting products with annual exporting amount/ destinations
	Brand name
	Production facilities
Other Information	Production capacity
	Price list
	Photo of factory/ production facility
	Photo of products with product catalogue (if any)

Planning of exporter information collection

For distributing profile formats (in the form of questionnaire) to the relevant exporters to obtain their profile data, the WG proposed to use a channel of the relevant industrial associations and to begin with two sectors for trial data collection to demonstrate the efficacy of this collection channel. The WG then suggested to begin with sectors of pulses/ beans and vegetable for trial. The JICA Project Team raised the web/ email-based data collection as another option, but the WG questioned the efficacy of this means. Data collection in collaboration with RTCs was also proposed, but this was not discussed further at the initial stage since this option needs funding for mobilizing their officers/ staffs.

It was then decided that the questionnaire (both hard and soft copies) be distributed through the relevant associations of pulses/ beans and vegetable for trial collection, where the associations would be requested by Myantrade to further distribute the questionnaires for the member exporters to fill-in.

Implementation of exporter information collection

This was found a constraint for proceeding this pilot activity. The relevant association (pulse/ beans) did not respond to the request letter from Myantrade. It turned out to be rare for the industrial associations to respond to such a request for data collection in favor of the government organization. Accordingly, both JICA Project Team and WG discussed alternative means of data collection for exporter's profiles, and found the following channels as likely options:

- Distribution of questionnaire to the participants of overseas trade fairs,
- Distribution of questionnaire to the attending exporters at the stakeholders' meetings of the National Export Strategy (held periodically).

Concerning an option i), questionnaires were distributed by the accompanying officers of Myantrade to the participants to Nanning Expo in China held on October 2017. However, a number of participant seemed reluctant to complete the format at site and brought the files back home, and hardly returned their profiles to Myantrade (only seven exporters completed and shared their profiles at site, out of some 100 participant exporters). An option ii) has not been a relevant channel since only a few exporters attended usually (although they completed and shared their formats at site). Total number of collected exporter's profile amounted to merely ten throughout the period of this pilot activity.

Design of exporters database and compilation of those collected information into the database

Even though a good number of exporter's profile have not been collected, both WG and JICA Project Team have been working for designing the database in preparation for data accumulation in the future. Learning from a similar portal listing the exporter's profiles in other TPOs, the JICA Project Team assisted the WG to designing the database, as shown below.

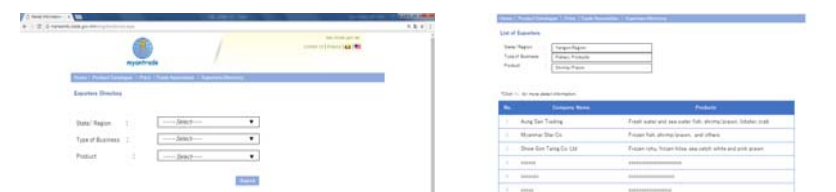


Image of interface for search function

Image of search result



Image of exporter's profile page (1)

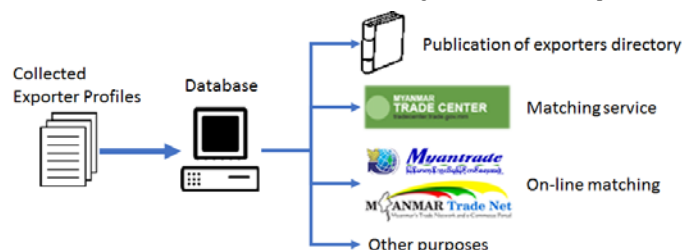
Image of exporter's profile page (2)

Image of exporters database

Exporter's profiles to be collected shall be entered to the database that is to be developed and uploaded in Myantrade's portal in the future, in accordance to the above image.

Utilization of the database for the purpose of preparation/ operation of export promotion services

Although Myantrade has not successfully collected exporter's profiles, the WG has shared a clear scenario of how such profile data would be utilized for the future programs of Myantrade. The figure below shows such a scenario shared with the WG concerning the utilization of exporters database.



A scenario of utilization of exporter's profiles

As shown, database-compiled exporter's profiles could be utilized for the purpose of i) publication of exporters directory, ii) matching service between overseas buyers and exporters either through on-line and manual handling. This database could be utilized for other purposes in the future, for example, as the delivery list of trade-related information including trade fair opportunities, market research/ news, and as the sourcing list of target beneficiary of exporter development and other technical assistance programs to be designed by Myantrade in the future.

Establishment of a mechanism of periodical update of the database

This activity was not conducted.

2.1.5 Output and Achievement

The following outputs have been achieved through this pilot activity:

- Questionnaire format of the exporter's profile,
- Ten collected exporter's profiles,
- Design of the exporters database,
- Scenario of how to utilize the database for the future functions of Myantrade.

Considering the progress of the planned activities and above outputs, this pilot activity has not brought about sufficient result on the ground that those expected objectives have not been achieved.

2.1.6 Lessons Learnt and Recommendation

This pilot activity has derived the following lessons learnt, that should be translated into the recommendations for further enhancement of Myantrade's functions, as follows.

Most relevant channel for collection of the exporter's profile

In Myantrade, the division that is able to exert most powerful guidance and most frequent contacts with exporters/ industry associations is considered as Trade Development Division (through the occasions of

trade fair). This pilot activity has not realized this respect nor approached to the division from the early stage. This might have caused a sluggish progress and realization of outputs. Learning from this experience, the JICA Project Team proposes Myantrade (Trade Development Division) to make any overseas trade fair participants obliged to fill-in or update the questionnaire for exporter's profile at the guidance meeting upon each overseas trade fair.

To complement the above, RTCs under Domestic Trade Division are also expected to cooperate for the collection of exporter's profiles where RTC officers/ staffs are mandated to visit a certain number of regional exporters (including potential ones) annually for data collection. RTCs needs budgeted for mobilizing their officers/ staffs for travelling and certain compilation work. This could be also a good opportunity of periodically grasping regional exporters' performance and their issues/ constraints.

2.2 Market Research (including overseas market data collection)

2.2.1 Objectives and activities

The objectives of this pilot activity are:

- To enhance the capability of market research of Myantrade officers/ staffs,
- To make them be familiar with sources of the relevant market information/ data (trade procedure, market requirement, product regulation/ standard, etc. of particular destination countries),
- To develop model market research report which contains all the relevant information/ data and recommendations for market development.

The following activities are scheduled for implementation on a pilot basis:

- Preparation of market research plan,
- Collection and processing of the necessary information/ data on target commodity/ market,
- Hearing interview to the relevant stakeholders,
- Reporting of market research,
- Report presentation,
- Development of standard format/ module of market research report.

2.2.2 Working Group members

The members of this WG is assigned as follows.

Position	Name	Division
Supervisor	U Win Myint	Division of Trade Information & Research
Team Leader	Ms. Kyi Cherry	ditto
Team Members	Ms. Khin Mar Swe	ditto
	Ms. Myint Thein	ditto
	Ms. Tin Tun	ditto
	Ms. Myat Soe Thwe	ditto
	Ms. Myint Mar	ditto
	Ms. Hnin Sandar	ditto
	Mr. Kaung Htut Aung	Division of Trade Development (MTC)
	Ms. Kay Khaing Htay	Division of Strategic Investment Promotion (NES)
	Ms. Phyo Thidar Aye	ditto
	Ms. Mon Oo	ditto

These members to be led by a team leader form a market research team to proceed the above activities under the technical guidance by JICA Project team. The JICA Team would also support the research team to access to any necessary information/ data on the target commodities and markets.

2.2.3 Position of JICA Project Team

The JICA Project Team was expected to give guidance and advice to WG members on how to design research plan, structure and write research report, and collect necessary market information/ data on target market/ commodity. In doing so, JICA Project Team was scheduled to mobilize the experts of target commodity and market research, and local consultant with an expertise of statistical data processing and analysis.

On the other hand, Myantrade was expected to assign its officers/ staffs for activity implementation during the course, and prepare travelling expense necessary for hearing interview to the relevant stakeholders and expense for data collection, etc.

2.2.4 Conducted activities

The scheduled activities have been conducted, as explained below.

Preparation of the market research plan

This pilot activity has begun with discussing what commodities/ which markets would be researched as model cases. The WG proposed to choose the commodities that have been prioritized by the National Export Strategy (NES), and raised oil seeds (sesame) and frozen fishery product (shrimp/ prawn) in accordance to the definitions of HS code. Since the European Union (EU) also has been assisting capacity building of Myantrade on trade data analysis utilizing EU market data, the WG indicated the Japanese market as the research subject.

Then, JICA Project Team commenced facilitating WG to preparing market research plan covering the overall schedule, means and items of research. The JICA Project Team then assisted WG to draft research items and obtained a consensus with WG as shown below. Two teams were then formulated among WG members to conduct two sets of market research.

Items to be researched by the WG

Resea	Section
Market trend of Japan	Domestic production
	Export and import
	Domestic consumption
	Market characteristics
Structure of Japanese market	Supply-chain structure
	Distribution system
	Trading and distribution practices
Government policies of Japanese market	Trade policies (import policies)
	Product regulations/ standards, market requirements, others
Opportunity of Myanmar export to Japanese market	Problems and potentials of Myanmar exporters
	Prospects of export to Japanese market
	Recommendations for market entry
Recommendations	Recommended actions
	Possible supports from the relevant ministries and others

Collection and processing of the necessary information/ data on the target commodity/ market

In proceeding the research work, WG has to work for a challenging task of identifying and collecting the necessary information/ data for market research, particularly concerning trade/ production statistics, foreign buyers, and the government policies of target market from a range of source. Among them, the government policies of Japanese market needed a large extent of support by JICA Project Team since this research item should deal with rather extensive information/ data as follows, and has caused language difficulty to WG members who have not been accustomed to English.

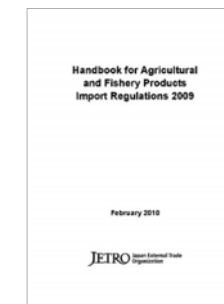
Information/ data to be collected for research item of "government policies of overseas market"

Category	Information/ data to be collected and analyzed
Quantitative control	- Prohibited and restricted goods - Import quota system, import control list
Product safety	- Regulations on food safety/ sanitation - Regulations on livestock/ fresh food import
Product standards	- Industrial and agricultural standards - Standards of weights and measures
Customs clearance	- Pre-shipment inspection (PSI) system - Customs clearance documents - Import procedure, license and registration system
Tariffs and duties	- Tariffs - Preferential tariffs and General Systems of Preferences (GSP) - Free Trade Agreements
Certification	- Rules of origin - Specific to subject products, and quarantine (e.g. phytosanitary/ health)
Others	- Supervising authorities - Associations and major industry players - List of trade fairs

Identification of the relevant sources and collection of the above information/ data from the sources were supported by JICA Project Team. The Team compiled the collected information/ data and explained how to access to the information/ data sources through organizing a specific workshop (two times) for this purpose in September 2017.



Sample of workshop material
(how to access to the data sources)



One of the referential materials
to collect market information

During this workshop, WG found it difficult to work for analysis of such collected market information/ data for two commodities at the same time, and then proposed to concentrate on one commodity during this pilot activity. The WG chosen frozen fishery product (shrimp/ prawn) as a research subject.

Hearing interview to the relevant stakeholders

The JICA Project Team advised WG to conduct hearing interview to the relevant associations (Myanmar Fishery Products Processors & Exporters Association for shrimp/ prawn) and a few exporters to study the current production and export performance, issues/ constraints faced and their needs for the government support or interventions. The WG has drafted the interview sheet (questionnaire) and JICA Project Team commented on this so that the interview produces the relevant inputs to the research work. The below shows the interview items revised by the WG.

Research item		Things to be asked
Characteristics of Japanese Market	Trading practices, distribution system/ channel	Patterns, means, forms of distribution, key player of distribution, etc.
	Current situation and characteristics of domestic market/ consumption	Featured demands/ preferences by Japanese buyers/ users of importers, habits of Japanese consumers, and their changes in the recent year.
	Possible issues of Japan's market and consumption trend	Any factors/ symptoms/ changes/ events which may affect market demands/ consumption and cause difficulty in meeting the demands.
	Major importers (contact information)	Key buyers, users of the target product.
Regulation and Procedure of Japanese Import	Specific requirements in Japanese market	Any special requirements in quality, form of packaging/ delivery, prices from Japanese buyers.
Prospects of Myanmar's Export to Japan	Current issues of Myanmar's exporters/ products	Any difficulties/ constraints faced in entering Japanese market and meeting Japanese demands.
	Potentials and opportunities for Myanmar's export to Japan	Chances for the future penetration of Japanese market and development of new segments for Myanmar product.

Interview items for market research (shrimp/ prawn products)

The WG has made two times of hearing interview to the association and a few times to the member exporters during September and October 2017.

An expert of JICA Project Team also organized one-day workshop in September 2017 to provide inputs and knowledge on the trend and performance, distribution channels and practices of the Japanese market, consumers' behavior and preferences with the recent notable changes, and the recent exporting competitors' performance to WG members.

Reporting of the market research

After a series of guidance workshop, and hearing interviews to the relevant stakeholders, WG started writing market research report. Then, JICA Project Team held a few times of workshop to i) advise and confirm the table of contents of the report (in October 2017), ii) guide how to conduct SWOT analysis and statistical data processing (by a local consultant in October 2017) and iii) comment on the interim result of the research (two times in November 2017). The WG agreed on the table of contents which covers the trends of the world trade/ Japanese market, characteristics of Japanese market (including supply-chain structure and distribution system/ practices), regulations and procedures of Japanese import, production and export performances of Myanmar, and recommendations and possible government support for the market development.

Following the above guidance, WG has successfully drafted market research report on frozen fishery product (shrimp/ prawn) for Japanese market in the beginning of January 2017 which covers the following contents, and further prepared the slide materials for the purpose of presentation.

Contents for market research report (shrimp products for Japanese market)

Chapter	Section
Acknowledgement Introduction	Purpose of the research
	Market and commodity of research
	Assigned researcher and the scope of work
Trade Performance of the World and Japan	Export/ import conditions by country
	The world export to Japan during the last five years
	Production performance of the major producing countries
	Import by Japan during the last five years
	Japanese domestic consumption and market characteristics
Japanese Market, Trading/ Distribution Structure	Importers/ trading companies
	Current market conditions
	Distribution and trading practice <ul style="list-style-type: none"> - Door to door distribution - Wholesale and retail markets
	Distribution channels of seafood/ processed products <ul style="list-style-type: none"> - Landing area market - Supermarket - Convenience store
	Issues in Japanese market
	List of regulations/ guidelines concerned with Japanese market
	Import-related permissions and procedures
Regulations concerned with Japanese Market	Customs, tariffs and import quota
	Trading/ distribution-related regulations
	Hygiene and sanitary testing
	Packaging and labelling
	Special requirements for Japanese market
	Others related to Japanese imports
	Types and forms of shrimp export (to Japan)
Myanmar's Production and Export	Large importing countries
	Conditions of shrimp production/ export
	Myanmar's exporters and exporting system
	Issues and needs of Myanmar's exporters
	Risk management
Recommendations	Recommended actions
	Possible supports from the relevant ministries and others

Report presentation

The WG has reported a draft preparation to the Director General of Myantrade. The Director General then requested WG to hold a preliminary presentation internally, where the Director General has advised and commented on the way the slides are prepared, and on issues/ needs held by Myanmar's exporters and recommendations. The WG has responded to these advice and comments to further brush-up the

research report in preparation of the official presentation.

There was one notable outcome from this pilot research. In the market research, WG has made a recommendation for the government to introduce the bonded license system to the promising exporters (exporters producing “processed product of fried shrimp” in this case) to enhance their international market competitiveness. This proposal was taken positively by the Director General of Myantrade, who committed to reporting this matter to the minister to examine the possibility of this proposal.



Then, an official presentation was organized by WG in February 2018, where the relevant officers of the MoC, the Ministry of Fishery, Yangon Economic Institute, and private stakeholders were invited. The WG, receiving the comments from the participants, finalized the research report. This research report is to be uploaded at the MoC’s portal and to be published.

Development of standard format/ module of market research report

The JICA Project Team and WG has discussed how Myantrade (those officers/ staffs of Trade Information and Research Division in particular) continues the research activities. For this purpose, JICA Project Team compiled all the guidance materials prepared during a series of workshop. Although a manual or guideline has not been prepared for this purpose, WG recognized that the model report with the guidance materials prepared during this pilot activity would be useful as a good reference for further market research even on different commodities and markets, and that the process experienced during this pilot activity would be pursued by themselves.

2.2.5 Output and Achievement

The following outputs have been achieved through this pilot activity:

- A model market research report, that was presented to the private stakeholders,
- Referential materials prepared during the course of guidance,
- Ten officers/ staffs having experienced the whole process of market research from planning to report compilation/ presentation
- A recommendation as a result of market research, taken for further examination by the MoC.

Considering the fact that all the WG members had not experienced the similar research work before this pilot activity, above progress and outputs are deemed as very satisfactory. This pilot activity has brought about a confidence among WG members since they feel confident in continuing market research work after the technical assistance.

2.2.6 Lessons Learnt and Recommendation

This pilot activity has derived the following lessons learnt that should be translated into the recommendations for further enhancement of Myantrade functions, as follows.

Allocation of younger officers/ staffs with basic equipment for research work

Although WG members have been confident in continuing the similar market research activity, the following constraints are apparent, i) limited number of younger officers/ staffs in Trade Information and Research Division who have good command of English and PC/ web-search skills, and ii) limited

number of PC available for usage together with slow internet access. This has caused rather slower progress of the pilot activity and WG’s decision to concentrate on one commodity instead of initial two ones.

Learning from this experience, JICA Project Team proposes Myantrade to assign more young officers/ staffs to this division and equip sufficient volume of PC with sound internet access, so that the division be able to extend coverage (both commodities and countries) of market information/ data collection and research in accordance to the model report. Myantrade is also expected to ensure close communication with the relevant private stakeholders (industrial associations in this case), so that the valuable inputs to research are obtained from them and research outputs be beneficial to them.

2.3 Trade Fair Management

2.3.1 Objectives and activities

The objectives of this pilot activity are:

- To encourage exporters to participate in trade fairs by providing proper guidance,
- To examine a feasibility of (co-)organizing a trade fair in Yangon for export promotion.

The following activities are scheduled for implementation on a pilot basis:

- Conducting an orientation gathering for Myanmar exporters/ producers to promote participation in international trade fair,
- Compilation and distribution of a guiding pamphlet for participating in a trade fair,
- Examination of a feasibility of holding a trade fair in Yangon.

2.3.2 Working Group members

The members of this Working Group (WG) is as follows:

Position	Name	Division
Supervisor	Mr. Nay San	Division of Trade Development
Team Leader	Mr. Win Than	Ditto
Team Members	Hla Wai	Ditto
	Moe Kyaw Thu	Ditto
	Khin Maung Oo	Ditto

2.3.3 Position of JICA Project Team

The JICA Project Team was expected to give guidance/ advice to the WG members on how to prepare the orientation gathering, collect information of trade fairs for preparing a pamphlet, and examine the feasibility for organizing a trade fair. Travel expense for inviting a lecture from JETRO was borne by the JICA Project Team.

On the other hand, Myantrade was expected to assign its officers/ staffs for activity implementation during the course, and prepare the cost for organizing the orientation gathering.

2.3.4 Conducted activities

The scheduled activities have been conducted, as explained below.

Conducting an orientation gathering for Myanmar exporters/ producers to promote participation in international trade fair

In order to encourage Myanmar exporters/ producers to participate in international trade fair, the WG planned to hold an orientation meeting of “Awareness seminar on international trade fair”, where advantages and necessary procedures in participating in trade fair were explained to private companies. The JICA Project Team advised the WG on designing contents of the seminar and selection of appropriate exporters/ potential producers as participants, and arranged for requesting a lecture from JETRO Yangon office. Outline of the seminar is shown as below.



Date	November 23-24, 2017	
Venue	Ministry of Commerce Office No.52, Nay Pyi Taw	
Participants	Small and Medium industries: 20 Lecturers and organizers: 18 (including Ministry of Industry (4) and Ministry of Agriculture, Livestock and Irrigation (2))	
November 23	09:45-10:00	<u>Opening Remarks</u> Director General, Myantrade
	10:00-11:00	<u>Experiences of UMFCCL-MECA on international trade fairs</u> Joint Secretary General, UMFCCL/ President, Myanmar Exhibition & Convention Association (MECA)
	11:20-12:15	<u>About Myantrade</u> Director, Trade development division Myantrade
	13:15-14:15	<u>Service provided to the exporters by Cooperative Department</u> Director, Cooperative Department, Ministry of Agriculture, Livestock and Irrigation
	14:15-15:45	<u>Things to know about Trade Fairs in Japan</u> Director, JETRO Yangon
	16:00-17:00	<u>Services provided to the exporters by SME Department</u> Director, Directorate of industrial supervision & inspection, Ministry of Industry
November 24	10:00-11:00	<u>Services provided to the exporters by Regional Trade Center (RTC)</u> Deputy Director, Domestic trade division, Myantrade
	11:15-12:30	<u>Things to know about international trade fairs</u> Deputy Director, Trade development division, Myantrade
	13:30-15:10	<u>Group discussion & presentation</u>
	15:10-15:30	<u>Closing remark</u> Deputy Director General, Myantrade

For the purpose of enhancing the partnerships among ministries in making use of the opportunity of trade fair for effective trade promotion, the WG cooperated with Ministry of Agriculture, Livestock and Irrigation and Ministry of Industry in providing a lecture and inviting potential exporters/ producers for international trade fairs. Each of lectures explained services available for exporters/ producers especially for trade fairs, the way to apply for exhibit, and experiences in past.

Compilation and distribution of guiding pamphlet for participation in a trade fair



The JICA Project Team and the WG discussed to prepare a reference on trade fair for promoting further proactive participation by Myanmar exporters/ potential producers. A draft guiding pamphlet compiled by the JICA Project team, collecting information from the WG, contains advantages to participate in trade fair, general procedures for participation, tips for success, information of major trade fairs, etc. The WG plans to finalize the pamphlet and prepare Burmese version for distributing exporters/ producers.

Examination of a feasibility of holding a trade fair in Yangon

The JICA Team collected information through interview with trade fair organizers in Myanmar in order to estimate an approximate cost of “Myanmar product show at Tatmadaw exhibition hall” as a reference for future event, shown below.

		*in US dollar
Duration	: 3 days in the best season for tourist	
Place	: Tatmadaw Exhibition Hall	
Layout	: Standard layout with central event/ show space	
Number of booth/ stand	: 100 (Tatmadaw can accommodate max. 160 standard booths)	

Cost item	Unit price	Assumption/ Condition
Space rental fee	1,500/ day	
Space rental fee during preparation	450/ day	2 days necessary
Electricity/ water expenses	150/ day	
Cleaning	600~700/ week	
Standard booth construction cost	50~100/ booth or for 100 booths	for standard booth set, with table/ chair (design/ decoration/ display facility shall be arranged by each exhibitor)
Central event/ show space construction cost with AV system	2,000/ set	Basic design/ layout
Decoration cost (interior and exterior)	2,000/ set	Basic design
Event promotion cost	1,000~3,000/ set	Promotion expenses for securing the exhibitors including pamphlet, guide
Event advertisement cost (FM/ newspaper/ journal/ TC/ billboard)	5,000~30,000/ set	Advertising expenses for domestic visitors/ guests (foreign visitors will be approached by the government)
Personnel cost	8,000~10,000 during 3days	Private security, police, receptionist, operational staff, service charges, event permit application and other miscellaneous cost
Others (Generator/ extra air-condition)	7,000~9,000 x 3 days	Need to rent extra aircon due to weak of Tatmadaw aircon units

*Booth charge for local exhibitor: 500,000~700,000MMK

The WG and the JICA concluded that it is premature to organize a trade fair in Yangon targeting overseas buyers, in consideration of low quality and few variety of Myanmar products. It would rather effective

that Myantrade make use of the budget to purchase booths for Myanmar potential producers to exhibit.

2.3.5 Output and Achievement

The following outputs have been achieved through this pilot activity.

- A model of orientation meeting of participation in trade fair,
- Guiding pamphlet (draft) for exporters/ producers to encourage participation in trade fair,
- Reference information for future implementation of trade fair in Yangon

Considering the fact that the services provided by the WG/ Trade Development Division regarding trade fair had been limited before this pilot activity, above progress and outputs are assessed as relatively satisfactory since the WG members began to realize the importance of proactive service delivery to customers.

2.3.6 Lessons Learnt and Recommendation

This pilot activity has derived the following lessons learnt, that should be translated into the recommendations for further enhancement of Myantrade's functions, as follows.

Delivering customer-oriented services

Services provided by Trade Development Division concerning trade fairs are relatively limited so far, mainly administrative procedures such as issuing export permission and distributing invitation of overseas trade fair to related association (selection of exhibitors are left to the association). Awareness of delivering customer-oriented services are still low among the officers, even though the JICA Project Team advised the WG to value the purpose and the target of services in implementing the activities.

To improve the value of an organization as TPO, and to make use of the opportunity of trade fair for effective trade promotion, it is necessary for Trade Development Division to make efforts on a regular basis, such as 1) to collect information of exporters/ potential producers, 2) to collect information of trade fairs and distribute to exporters/ producers, and 3) to give a guidance and financial/ technical support for exhibitors of making attractive marketing promotion at trade fair.

2.4 Exporter/ Importer Support Services

2.4.1 Objectives and activities

The objectives of this pilot activity are:

- To improve services of MTC to meet the requirements of exporters and foreign buyers and make MTC more attractive,
- To enhance the collaboration among MTC and regional trade centers (RTCs) for improving services of regional trade centers.

The following activities are scheduled for implementation on a pilot basis:

- Organizing mini seminar for exporters at MTC,
- Organizing onsite guidance to RTCs through mini seminar at RTCs,
- Preparation of brochures of MTC & RTCs written in Burmese, English and Japanese.

2.4.2 Working Group members

The members of this Working Group (WG) is as follows:

Position	Name	Division
Supervisor	Mr. Nay San	Division of Trade Development
Team Leader	Mr. Mya May Sein	ditto (Myanmar Trade Center)
Team Members	Mr. Kaung Htut Aung	ditto (Myanmar Trade Center)
	Ms. Mee Mee Htwe	ditto (Myanmar Trade Center)
	Ms. Zar Ni Myint	ditto (Myanmar Trade Center)

Regional trade centers will be trainees and they will be responsible persons in regional trade centers.

2.4.3 Position of JICA Project Team

The JICA Project Team was expected to give guidance/ advice to the WG members on how to design a series of mini seminar, to provide lectures and advice to the participants at mini seminars, and to provide technical support on designing questionnaire for the seminar participants as well as on preparing MTC & RTCs brochures. A lecture fee from private institute and printing cost for preparing the brochures were borne by the JICA Project Team.

On the other hand, Myantrade was expected to assign its officers/ staffs for activity implementation during the course, and prepare the cost for organizing mini seminars and for travelling to RTC.

2.4.4 Conducted activities

The scheduled activities have been conducted, as explained below.

Organizing mini seminar for exporters at MTC

For the purpose of enhancing the function and management of MTC as well as promotion of MTC, the WG and the JICA Project Team planned and organized a series of mini seminars. First mini seminar was organized at MTC on August 30, 2017, with the title of "Exporter Dialogue: How to enter Japanese Market for Foodstuff Industry". 13 participants were exporters/ producers from the business fields of vegetables, tea, pea rice, coffee, natural drink, vermicelli, food staff, sesame, etc. After a brief introduction of MTC and the purpose of the seminar by MTC, the JICA experts made presentations on how to enter Japanese market: characteristics of Japanese market, procedures of food exporters to Japan, potential Myanmar products, and key points of marketing. In the following session of Q & A, the participants exchanged opinions with the WG as well as the JICA experts on a potential of their products for Japanese market, asked questions on exporting procedures and services provided by MTC/ Myantrade.

Second mini seminar at MTC was conducted on December 4, 2017. Upon a proposal from the WG, the theme of this seminar was decided as "Exporter Dialogue: Branding for Export Promotion". Lectures on idea of branding and how to create appealing brand of own company/ product by the principal of business school and the JICA expert, followed by a guest speech of a marketing manager from a successful cashew nuts processing company, were delivered to around 40 participants.

Organizing onsite guidance to RTCs through mini seminar at RTCs

As an initial trial for implementing mini seminar at RTC, Yarmanya Trade Center, Mawlamyine, Mon State organized “Exporter Dialogue: How to enter Japanese Market for Foodstuff Industry” on September 4, under the supervision of MTC. Participants were 43 person including personnel of Ministry of Industry and Mon State Chamber of Commerce and Industries. 27 participants were from private sector such as preserved fruit processing, pulses & beans, sesame seed, spice, etc. This trial aims to enhance the collaboration among MTC and RTCs for improving services of regional trade centers and promoting MTC & RTCs in regional area. After a series of lectures by MTC and the JICA experts, consultation on how to promote export of Mon State was given to the participating exporters/ producers.



The WG, Yarmanya TC officers and the JICA Project Team then visited to local companies in Mawlamyine after the seminar, rubber company and rice mill company, for the propose of understanding the current situation and issued of local private sector and introducing possible assistance by Myantrade.

Preparation of brochures of MTC & RTC written in Burmese, English and Japanese



The JICA Project Team reviewed MTC & RTC brochure and improve it as one of promotion tools for domestic exporters/ producers as well as overseas buyers. New brochures were prepared in English, Japanese and Burmese, which consist of outline of MTC, services provided by MTC and information of RTCs.

2.4.5 Output and Achievement

The following outputs have been achieved through this pilot activity.

- A model of mini seminar/ exporter dialogue at MTC & RTCs,
- Officers/ staffs having experience the collaboration activity among MTC & RTCs,
- Brochures of MTC/ RTCs.

Considering the progress and outputs above, this pilot activity has brought about sufficient result as those planned activities have been achieved as scheduled and the WG intends to continue the activities after the technical assistance.

2.4.6 Lessons Learnt and Recommendation

This pilot activity has derived the following lessons learnt, that should be translated into the recommendations for further enhancement of Myantrade’s functions, as follows.

HRD training of younger officers/ staffs and allocation of officers/ staffs to RTCs

Although the planned pilot activity has been smoothly conducted, and the WG members have been confident in continuing the similar activity, the following constraints are apparent, i) limited number of younger officers/ staffs in MTC/ RTCs who have good knowledge and experience to provide necessary trade related information to exporters as well as overseas buyers, and ii) limited number of officers/

staffs as well as facilities at RTCs/. This would cause rather slower progress of improving the service delivering.

Knowledge transfer and practical training to younger officers/ staffs of MTC is necessary for enhancing the function and management of MTC, through compiling FAQ for consultation to exporters and overseas buyers, improving a mechanism of matching service, etc.

JICA Project Team proposes Myantrade to assign more young officers/ staffs especially to RTCs with sufficient basic equipment such as PC with sound internet access, so that RTCs be able to plan and conduct expected activities in each region, while providing guidance to regional centers in order to upgrade their services.

Appendix 12:

Integrated Export Development Program

Integrated Export Development Program

Implementation Plan

Myanmar Trade Promotion Organization (MYANTRADE)

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1 Background

Myanmar' export development faces with the following issues:

- 1) High dependence on commodity exports
 - It is necessary to develop higher value-added export products and diversification of export products.
- 2) Limited capabilities of exporters in terms of technology and management
 - It is necessary to enhance potential exporters' capability and develop value chains of exporting industries.
- 3) Limited resources of Myantrade and other related organizations for exporter development
 - It is proposed to provide integrated export supports to priority exporters for effective export development.
- 4) Low recognition level of attractiveness of Myanmar export products
 - It is required to promote Myanmar export products effectively and establish Myanmar brand.



Figure 1: Background of Program

2 Objectives

This program is formulated with the following objectives:

- 1) Identify and promote excellent and potential export products and exporters
- 2) Provide integrated exporter development supports in order to upgrade the identified excellent export products and capabilities of exporters
- 3) Promote the identified excellent export products and establish Myanmar brand under the concept of national branding

3 Program Design

The Program is designed to implement targeted **export development** with limited resource of Myantrade.

This Program aims at **effective promotion** to overseas buyers and markets by focusing most potential exporters and export products.

This Program aims at supporting target exporters with **good coordination of various export development efforts** such as NES, industrial supply chain development, cluster development.

This program consists of three activities: i) Activity 1: Identification of Excellent Myanmar Export Products; ii) Activity 2: Integrated Exporter Development Support; and iii) Activity 3: National Branding with Excellent Myanmar Mark.

The Program starts with Activity 1 to identify potential exporters and export products and this can realize the identification of priority targets of Myantrade's efforts of export development.

Activity 2 and Activity 3 will follow Activity 1 and be implemented in parallel and complementarily. Activity 2 will aim at the capacity development of exporters and development of exportable products. Activity 3 will focus on the promotion of competitive products under the concept of national (and regional) branding.



Figure 2 Objectives of Program

4 Activity 1: Identification of Excellent Myanmar Export Products

4.1 Contents of Activity

The purpose of this activity is as follows:

To identify (potential) excellent export products and compile database of those excellent products from the viewpoints of high quality, good design and evaluation of overseas markets/ buyers, so on.

This activity consists of the following components:

(1) Find (potential) excellent export products and potential exporters

Myantrade will find information of excellent export products and products which can be developed to be future excellent export products.

Major sources of information are regional trade fairs, associations, recommendations by regional trade centers, etc.

(2) Build database of excellent export products and exporters

Myantrade will construct database of identified excellent export products and exporters.

(3) Provide an award to the selected Myanmar excellent export products

Myantrade will design and initiate a program of Myanmar Excellent Export Award.

4.2 Implementation Steps

This activity will be implemented according to the following steps:

- 1-1: Decide division(s) of Myantrade responsible for the implementation of program and organize a working group for implementation.

Myantrade organizes a working group for conducting tasks of this activity. The working group consists of relevant divisions of Myantrade.

The roles of working group are as follows:

- Formulating an implementation plan of the Activity
- Coordinating an implementation of the Activity
- Reporting the implementation to the upper management
- Monitoring and evaluating the results of the Activity

- 1-2: Examine a way of collecting information of candidate excellent export products

- 1) The working group decides criteria of data collection in accordance with the objectives of the Activity.

Factors deciding excellent export products may include the followings:

- Export performance in terms of export value
- Export entering a new market
- Export with own brand
- Export products using modern technology
- Export products with sophisticated design
- Export products using a characteristic specific to Myanmar
- Up-and-coming export product
- Export products by SMEs

Target export products are all products and services that are made in Myanmar by

both local and foreign companies.

- 2) The working group prepares a fact sheet of excellent Myanmar product for data collection.

The fact sheet includes such items as outline of company, outline of product, experience and potential of export, etc.

- 3) The working group formulates a plan of data collection.

Myantrade possesses information of excellent Myanmar products that have participated in trade fairs supported by Myantrade. They have been top Myanmar products for export promotion by Myantrade. This information is one of sources of data collection.

Other sources of information are recommendations by regional offices of MOC and recommendation by associations.

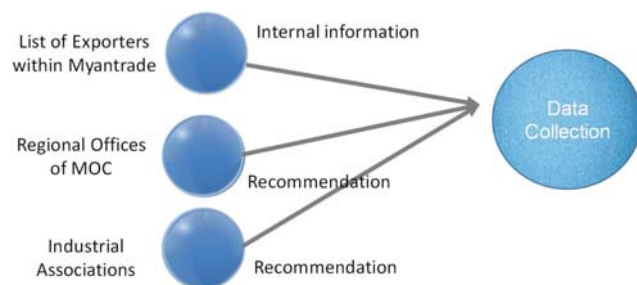


Figure 3: Channels of Data Collection

- 1-3: Collect information of candidate excellent export products through regional trade fairs, associations, regional trade centers of MoC, etc.

- 1) The working group formulate a list of excellent exporters and products with internally available information.

The working group collect the information form the lists of participants in the past trade fairs, export statistics, and so on.

- 2) The working group requests MOC's regional offices to recommend potential exporters and export products.

Regional offices are expected to identify potential exporters and products.

- 3) The working group request business associations to recommend potential exporters and export products.

Not only commodity-based products but machinery & equipment, FOB apparel and FDI-manufactured products are also covered.

- 4) The working group makes a list of candidate potential excellent exporters and export products.

The working group makes a list by compiling and sorting the internal information and information from regional offices and business associations and selecting appropriate candidates.

- 5) The working group submit a format of fact sheet to candidate exporters.

The working group sends a format of fact sheet to candidate exporters with a request letter signed by high ranking officer of MOC/Myantrade.

The working group also asks a collaboration of business associations.

- 6) The working group collects fact sheets from candidate exporters.

The working group thinks out effective methods of collecting fact sheets, for example, online registration, follow-up by e-mail/phone, and so on.

- 1-4: Construct database of the collected information

- 1) The working group construct database of the collected fact sheets.

The collected information of fact sheets is compiled into database.

- 2) Myantrade utilizes the database for export promotion activities.

The database is used for selection of trade fair participants, matching service, online exporter search service, directories, publication, etc.

- 1-5: Select top excellent exporters and export products from the collected candidate exporters and products

- 1) The working group decides selection criteria for top excellent exporters and export products.

Criteria are considered for different categories, for example, quality brand products, Myanmar specialties, SMEs, and so on.

- 2) The working group selects top excellent exporters and export products.

The working group selects top excellent exporters and export products for each category.

- 1-6: Provide an award to excellent Myanmar export products and exporters

- 1) The working group examine a viability of “Excellent Myanmar Export Award” program.

The working group plans a new program of Excellent Myanmar Export Award and examine the usefulness and viability of program.

The plan includes the following items:

- Objectives
- Selection criteria, selection categories, requirements, judgement method
- Selection procedures and schedule
- Benefits to exporters
- Expected effect

- 2) The working group hears opinions of stakeholders on the award program.

The working group hears opinions of stakeholders such as related ministries and organizations, business associations, etc. on the proposed award program. With this purpose, a consultation workshop is organized inviting stakeholders.

It is necessary to establish consensus among stakeholder for the start of the award program.

- 3) The working group coordinates with stakeholders to organize an implementation organization for the award program.

An implementation organization may be needed to be established by inviting related ministries and organizations.

- 4) The implementation organization conducts the award program.

The implementation steps of program consist of announcement, registration of participants, screening of application documents, selection of nominees, final judgement and announcement of winners, and awarding ceremony.

It is assumed that an award is granted to best export product(s) and exporter(s) in different categories (for example, high performing product, new market entry, SME champion, etc.).



Figure 4: Cycle of Awarding

- 1-7: Continue the steps of 1-3 to 1-6 annually

Myantrade continues to update database of excellent exporters and export products and utilize them for export promotion activities.

The selection and award of top excellent exporters and export products are implemented every year when the award program is implemented successfully.

Table 1: Implementation Schedule of Activity 1

		2018			2019								
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Activity 1: Identification of Excellent Myanmar Export Products													
1-1:	Decide division(s) of Myantrade responsible for the implementation of program												
1-2:	Examine a way of collecting information of candidate excellent export products												
1-3:	Collect information of candidate excellent export products through regional trade fairs, associations, regional trade centers of MoC, etc.												
1-4:	Construct database of the collected information												

Integrated Export Development Program

[illegible]

5 Activity 2: Integrated Exporter Development Support

5.1 Contents of Activity

The purpose of this activities is as follows:

To strengthen prospective exporters and improve their products, technology and exports by providing advisory, intensive training and export marketing support during a project period (e.g., one year).

This activity consists of the following components:

(1) Selection of target companies to support

Myantrade selects target companies by evaluating their potential with the criteria and qualification.

(2) Provision of advisory

Instructors (coaches) periodically give face-to-face advice to the target companies. Instructors are Myantrade officials/staff, outside experts, lecturers, etc.

(3) Provision of intensive training

TTI, MTC and/or regional trade centers periodically provide intensive training to the target companies.

(4) Support to marketing

Myantrade provide export promotion supports such as business matching and trade fairs to the target companies.

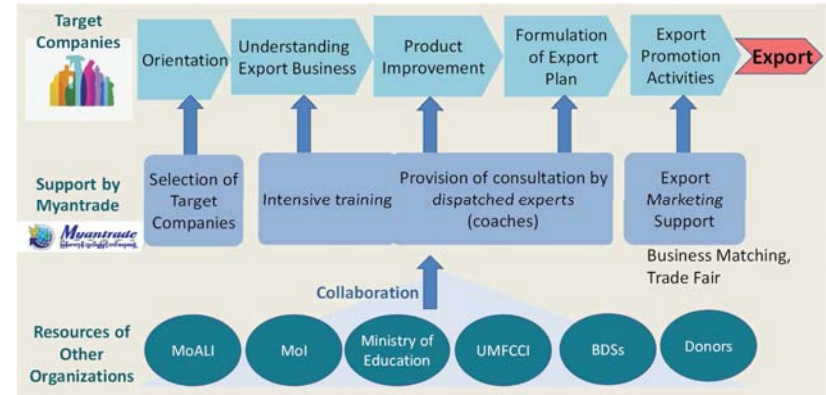


Figure 5 Implementation Flow of Integrated Exporter Development

5.2 Implementation Steps

This activity will be implemented according to the following steps:

- 2-1: Decide division(s) of Myantrade responsible for the implementation of program and organize a working group

Myantrade organizes a working group for conducting tasks of this activity. The working group consists of relevant divisions of Myantrade.

The roles of working group are as follows:

- Formulating an implementation plan of the Activity
- Coordinating an implementation of the Activity
- Reporting the implementation to the upper management
- Monitoring and evaluating the results of the Activity

- 2-2: Organize a support unit to provide supports to potential exporters by finding resources of expertise (related ministries, associations, universities, BDSs, donors, etc.)

Myanmar Trade Center (MTC), regional offices of Myantrade and Trade Training Institute (TTI) are major members of the support unit.

The working group identifies possible source of exporter support other than Myantrade. SME Centers of the Ministry of Industry, the Department of Research and Innovation, universities, business associations and business development services

providers are also potential sources of technical service.

2-3: Develop a package of supports to potential exporters

The working group develops a package of support to potential exporters by combining possible supports by Myantrade and other sources.

2-4: Select target exporters to support

The working group decides criteria of exporters which are eligible for this activity.

Myantrade selects target exporters for this activity on the basis of criteria set by the working group. The number of target exporters is decided within Myantrade's capability.

2-5: Design a menu of support to each target potential exporter

Myantrade designs a menu of support to each target exporter. It is considered effective to provide intensive support to exporter during a certain period, for example, one year.

A menu consists of i) provision of advisory, ii) intensive training and iii) marketing support. Technical service such as R&D support and design sophistication are also provided when technical assistance is available, for example, from local experts or donors.

2-6: Provide supports to potential exporters

Myantrade provides integrated support to target potential exporters.

2-7: Monitor and evaluate the results of exporter support

Myantrade monitors the progress of integrated support by individual exporters and make adjustment of support if necessary.

Myantrade evaluate the results of exporter support by exporter and consider necessary improvement of activity.

2-8: Continue the steps of 2-4 to 2-7 annually

Myantrade continues to implement the integrated exporter development support every year.

Table 2: Implementation Schedule of Activity 2

	2018			2019								
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Activity 2: Integrated Exporter Development Support												
2-1: Decide division(s) of Myantrade responsible for the implementation of program												
2-2: Organize a support unit to provide supports to potential exporters by finding resources of expertise (related ministries, associations, universities, BDSs, donors, etc.)												
2-3: Develop a package of supports to potential exporters												
2-4: Select target exporters to support												
2-5: Design a menu of support to each target potential exporter												
2-6: Provide supports to potential exporters												
2-7: Monitor and evaluate the results of exporter support												
2-8: Continue the steps of 2-4 to 2-7 annually												

6 Activity 3: National Branding with Excellent Myanmar Mark

6.1 Contents of Activity

The purpose of this activities is as follows:

- To promote the selected excellent products under the national branding concept:
- To certify Myanmar Excellent Mark to excellent export products made in Myanmar
 - To authorize them to put the Myanmar brand mark of their packages
 - To make use of Myanmar Excellent Mark to improve the image and reliability of Myanmar products
 - To promote products awarded Excellent Myanmar Exporter and products with Excellent Myanmar Mark as national branding

This activity consists of the following components:

(1) Certification of Myanmar Excellent Mark for excellent export products made in Myanmar

Integrated Export Development Program

Myantrade evaluates and certifies excellent Myanmar products from the viewpoints of technical quality, design, performance, evaluation by users, etc.

(2) Provision of privileges

Myantrade entitles the certified products to use the Myanmar's brand mark, that is, "Excellent Myanmar" mark.

Myantrade preferentially provides export promotion services to the certified products.

(3) Publicity of Excellent Myanmar Mark

Myantrade promotes the recognition of Excellent Myanmar Mark by various means of publicity.

(4) Use of Excellent Myanmar Mark in export promotion

Myantrade utilizes the Excellent Myanmar Mark as a means of national branding activities such as overseas trade fairs.

The examples of national branding of other countries are shown as follows:

Case of National Branding of Thailand

- **Thailand Trust Mark** is licensed by DITP to companies whose branded products and services meeting government's criteria, covering such positive attributes as refined craftsmanship, quality, originality and distinction.



- In order to promote tourism industry, Thailand introduced "**Thai Select logo**" which awards high quality service sector such as restaurants, spas and health services by meeting the standard of hospitality, atmosphere and efficient operation.



Integrated Export Development Program

Source: www.thailandtrustmark.com, <https://thaiselectny.com>

Case of National Branding of Malaysia

- SME Corporation Malaysia, in collaboration with SIRIM QAS International Sdn. Bhd. has developed the National Mark of MALAYSIAN BRAND certification program that promotes the development of Malaysian brands to meet global quality standards.
- Organizations that participate in the program and successfully fulfill all the required criteria will be awarded the right to use the National Mark of MALAYSIAN BRAND on their product packaging and in all their marketing communications efforts.



Source: www.nationalmark.gov.my, www.matrade.gov.my

Case of National Branding of Vietnam

- In Vietnam, the **National Brand Program** was launched to build its high-quality products and services with the Prime Minister in Decision No. 253/2003 / QĐ-TTg of November 25, 2003. The Ministry of Industry and Trade is the core agency responsible for coordination the Program.
- The National Brand Logo, which is entitled Vietnam Value, is awarded to product brands that meet the criteria of the Program. The selection of branded National Brands products is conducted every two years. In 2014, 64 companies were honored national brand awards.
- Participants to the program can get the State's support in protecting and registering their trade names at home and abroad. In addition, the Trade Promotion Agency will assist prize-winning businesses in building capacity on design and packaging.



Source: <http://www.vietrade.gov.vn/>

Case of Branding of Myanmar products by Retailer

- City Mart started the Pride of Myanmar program with the aim of alleviating the competitive level and standards of local food & beverage producers. The program was aimed at being a showcase of the best of Myanmar's food & beverages to the world.
- City Mart selects excellent Myanmar local food & beverages. The selected products are promoted at their retail outlets.



Source: <http://www.citymart.com.mm>

6.2 Implementation Steps

This activity will be implemented according to the following steps:

- 3-1: Decide division(s) of Myantrade responsible for the implementation of program

Myantrade organizes a working group for conducting tasks of this activity. The working group consists of relevant divisions of Myantrade.

The roles of working group are as follows:

- Formulating an implementation plan of the Activity
- Coordinating an implementation of the Activity
- Reporting the implementation to the upper management
- Monitoring and evaluating the results of the Activity

- 3-2: Examine a viability of Myanmar Excellent Mark certification

The working group formulates a plan of Myanmar Excellent Mark certification.

The purpose of certification is that Myantrade certifies Myanmar's export products which satisfy a certain quality level, special features, legal compliance, etc. with the purpose of gaining trust of foreign buyers and consumers to Myanmar products and establishing Myanmar brand.

Certified products are entitled to use Excellent Myanmar Mark on their products.

The working group examines a viability of this plan by hearing opinions of stakeholders and analyzing possible obstacles such as existence of eligible products, capacity of technical evaluation, budget, operating organization, etc.



Figure 6 Examples of Excellent Myanmar Mark

The concept of Excellent Myanmar Mark is closely related to geographical indication and geographical origin indication (local content). It is necessary to examine differentiation and/or combination with those concepts.

- 3-3: Organize a committee of Excellent Myanmar Mark certification

The working group coordinates with stakeholders to organize a committee of Excellent Myanmar Mark certification.

- 3-4: Examine a purpose of "Excellent Myanmar" mark and design a system of Excellent Myanmar mark

The committee examines and confirms an aim of Excellent Myanmar mark.

The committee designs a system of Excellent Myanmar mark including the purpose, organization, procedures, schedule, etc.

- 3-5: Design qualification criteria of Excellent Myanmar mark

The committee design qualification criteria of Excellent Myanmar mark. An example of criteria is as follows:

- Incorporation and registration at DICA according to the Myanmar Companies Law
- Registration of brand
- Certification of local/international standards
- Export experience
- Legal compliance including intellectual property right

Integrated Export Development Program

- Quality and design of product
- Local content, etc.

3-6: Operate the Excellent Myanmar mark certification

The committee formulate a work schedule of certification and organize an evaluation team for certification.

The committee invites applications for Excellent Myanmar Mark and evaluate applied products and certify products for Excellent Myanmar mark

3-7: Promote excellent Myanmar products on various occasions of export promotion

Myantrade promote products awarded Myanmar Export Award (Activity 1) and products with Excellent Myanmar mark on various occasions of export promotion such as trade fairs, trade missions and website.

3-8: Continue the steps of 3-5 to 5-7 annually

The Excellent Myanmar Mark certification is implemented every year.

Myantrade continues to promote excellent Myanmar products on various occasions of export promotion.

Table 3: Implementation Schedule of Activity 3

	2018			2019								
	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Activity 3: National Branding Promotion with Excellent Myanmar Mark												
3-1: Decide division(s) of Myantrade responsible for the implementation of program												
3-2: Examine a viability of Myanmar Excellent mark certification												
3-3: Organize a committee of Excellent Myanmar mark certification												
3-4: Examine a purpose of "Excellent Myanmar" mark and design a system of Excellent Myanmar mark												
3-5: Design qualification criteria of Excellent Myanmar mark												
3-6: Operate the Excellent Myanmar mark certification												

Integrated Export Development Program

3-7: Evaluate applied products and certify products for Excellent Myanmar mark												
3-8: Promote excellent Myanmar products on various occasions of export promotion												
3-9: Continue the steps of 3-5 to 5-7 annually												

Appendix 13:

Recommendations on Trade-related Policies for Investment Promotion of
Export-oriented Industry

Recommendations of Trade-related Policies for Promotion of Export-oriented Investments

1. Trade Agreements

Myanmar has shared the basic principle of freedom (reduction of duties, ban of quantity limit), non-discrimination of trade activity, and multilateral trade system, and entered the World Trade Organization (WTO) in July 1995 which discusses the comprehensive international trade rules. Myanmar also joined the General Agreement of Tariffs and Trade (GATT) in July 1948 which was succeeded by the WTO.

Myanmar officially joined the ASEAN in July 1997, and has been a member of ASEAN Economic Community (AEC) established in December 2015. AEC, intended to integrate the ASEAN's regional markets, has achieved the higher level of free trade regime, where the tariffs of over 90% of tradable goods become zero. AEC aims at further liberalization on the service trade, investment/ capital flow, and movement of skilled labor. Furthermore, ASEAN has participated in Free Trade Agreement (FTA) of "ASEAN+1" or Economic Partnership Agreement (EPA) with Japan, China, Korea, India, Australia and New Zealand respectively, and has been negotiating Regional Comprehensive Economic Partnership (RCEP) with these 6 nations.

Before the establishment of AEC, Myanmar entered ASEAN-FTA (AFTA) which was formulated in the fourth ASEAN Summit held in January 1992, and became one of the four later members (with Vietnam, Laos, Cambodia) in 1997. AFTA envisions the goal of import tariff removal. Although the later members set their goal to reduce the tariffs for goods in the region to zero by 2015, the realization of final tariff ratio (0-5%) of the Common Effective Preferential Tariff (CEPT) has been delayed. The ASEAN Trade in Goods Agreement (ATIGA) based on AFTA has stipulated the regulation of import tariff exemption for realization of the free goods movement, as well as the agreements of comprehensive investment and trade in service.

In addition to AEC, Myanmar joined the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC) in December 1997 and then agreed on the framework of BIMSTEC FTA. The current members amount to seven nations crossing two regions of South Asia and Southeast Asia, including Myanmar, India, Bangladesh, Sri Lanka, Nepal, Bhutan, Thai. BIMSTEC has entered the agreements of cooperation in 14 fields including trade. Conclusion of FTA has remained an important theme in BIMSTEC. As of 2004, the BIMSTEC members signed the framework agreement on FTA, and notified this to the WTO, however, the subsequent negotiation was not progressed smoothly.

In 2014, the members have signed the memorandum of understanding concerning the opening of the permanent secretariat office at the BIMSTEC Summit held in Myanmar, followed by the official establishment of the secretariat in Dhaka in September 2014. Further in January 2015, BIMSTEC seminar was held where the foreign minister of Bangladesh stated its commitment to the early finalization of FTA. However, the FTA has been in the negotiation process. It is assumed that it takes another 10 years to realize the removal of tariffs for general goods through closing and enactment of the treaty, although agreed on the FTA in the future.

In addition, the GoM has signed five border trade agreements with China, India, Bangladesh, Thailand, and Lao PDR. The MoC has been consulting and negotiating with such border trade partners through establishing the Joint (Border) Trade Commission respectively, with the aim of facilitating and promoting trade with neighboring countries.

2. Trade-related Policies of Myanmar

Trade-related policies of Myanmar are summarized as below;

(1) Trade management system

In Myanmar, it is necessary to establish the company as trading business, to register as exporter or importer, and to be licensed for each traded item (many items still require prior licensing). Since the

foreign companies are not registered for trading business, they need to rely on the local companies for exporting/ importing.

Subject	Explanation
Laws concerned	Export and Import Law (September 2012) and notifications based on the law. With this enactment, the former export/ import control law in 1947 was abolished, however, the notifications based on this former law remain still effective, unless acting counter to the 2012 law.
General	It is necessary to establish the company as trading business, to register as exporter or importer, and to be licensed for each traded item (many items still require prior licensing). Foreign companies have not been permitted to register for trading business since 2002, only local companies can register for trading business (necessitating to rely on local companies for exporting/ importing). In November 2015, foreign companies become permitted to engage in trading of 4 limited items (fertilizer, seed, pesticide, medical equipment) through joint-venture. It is however noted that processors on commission and manufactures are permitted to trade their raw materials and processed products, despite foreign companies.
Import control - Banned items - Restricted items	Liquor, beer, tobacco, and other items banned by the existing law. Food and drug: as far as permitted by Food and Drug Administration of the Ministry of Health (MoH). Alcohol: Used to be imported only by international hotels/ duty free shops permitted by the Ministry of Hotel and Tourism, but currently allowed import of wine to other than hotels in March 2015. Import of alcohol except wine has not been relaxed (as of January 2016). Used machinery: permitted if satisfying the following conditions, (i) maintained in good condition, (ii) usable for another 10 years, (iii) guaranteed on spare-parts import for another 10 years, (iv) available and mobilized for technicians, (v) confirmed on usability by technician within 2 weeks after import. Used vehicle: needs to check the latest information, since the conditions vary depending on type/ age. In addition, plants, vegetables, flowers, seeds, animals need quarantine certificate by the supervising agencies, and chemical materials needs recommendation letter from the MoH.
Import license	Stipulated 3,988 items necessary for import licensing (as of December 2016).
Export restriction	Currently, the following 12 items are restricted, adding log including teak wood; Agriproduct= parts of sesame, poppy/ its oil, sunflower/ its oil, oil cake, minerals= gold, diamond, oil, animal/ animal product= ivory, cow/ buffalo and rare animals, Others= shrimp powder, weapon/ ammunition, antique
Export license	Needs licensing excluding the exempted 983 items (February 2014).

Source: Compiled from JETRO, the Ministry of Commerce

(2) Customs system

Myanmar has been shifting the official assessment system which determines the taxable value by the customs to the self-assessment system based on the invoice value which follows the tariff valuation agreement of the WTO. This shift has been proceeded in accordance to the introduction of Myanmar Automated Cargo Clearance System (MACCS) based on Japanese electronic customs clearance system (NACCS).

Subject	Explanation
Laws concerned	Customs Law (1992), the latest data (January 2012) of tariffs is available from the Customs Department.
Tariff system	<i>ad valorem</i> . The GoM has issued the revised Customs Law in March 2015, followed by the necessary legal preparation to adopt the invoice-based valuation. Myanmar has been shifting the official assessment system where Customs Department determines the taxable value to the self-assessment system based on the invoice value in accordance to the introduction of MACCS since November 2016.
Tariff line category	According to the HS Code category
Tax basis	CIF value, import tariffs is calculated based on the sum of CIF value and discharge costs (0.5% of CIF equivalent). In principle, import is made on CIF terms, but the other terms exist as follows (insurance cost is included in tax basis unless insured);

	<ul style="list-style-type: none"> - Import of ship cargo on FOB terms= to claim 20% of FOB value as shipping fare/ insurance cost - Import of air cargo on FOB terms= to add 5% of FOB value
Special preference	
- Import	<ul style="list-style-type: none"> - AEC/ ATIGA: Obligated to remove import tariffs by 2015 (time limit is extended until 2018 for less than 7% of items). - Japan-ASEAN Comprehensive Economic Partnership (AJCEP) Agreement: Signed on April 2008, being effective on December 2008, 85% of items are to be removed by 2018 (starting in 2011). - FTA between ASEAN and other nations: ASEAN has entered FTA with China, Korea, India, Australia, New Zealand, where Myanmar is scheduled to remove tariffs by each nation. - RCEP: Started negotiation since May 2013.
- Export	<ul style="list-style-type: none"> - System of Preference: Developed countries apply the Generalized System of Preference (GSP) to developing countries for reducing tariffs. Myanmar, one of the least developing countries (LDC), has received the specialized preference. Japan in principle has applied duty-free/ no quota. Since 2011, those items, produced utilizing the materials exported from Japan, are regarded as local product of Myanmar, making processing on commission easier. EU decided to re-apply the GSP in June 2013¹, which had been stopped. - AEC/ATIGA: Reduced all the items to zero for the original six member nations of ASEAN in 2010 (the later member of Myanmar is given moratorium period). - AJCEP Agreement: Scheduled to reduce tariffs of 90% items to zero by 2018. - FTA between ASEAN and other nations: China is scheduled to make tariffs zero by 2010, Korea by 2010, India by 2011, Australia and New Zealand by 2020. - RCEP: under negotiation.
Other taxes than tariffs	<p>Commercial tax (5% in principle) = equivalent to VAT. Collected together with tariffs for import items. Tax rate is basically 5%, but some special items such as vehicle, gemstone, alcohol, tobacco apply the higher rates ranging from 8% to 120%. Tax basis is the discharge value (sum of taxable value for import tariff and tariff amount).</p> <p>Prepaid income tax (2%) = Introduced since 2013, charged for all traded items. Payable (2% taxable value) before submission of export application in case of export, and together with tariff payment in case of import. Not applied for items to be imported by MIC approved importer, raw materials for processing for commission, grant items related to ODA, vehicle import by individuals, etc.</p> <p>Export tax = Not applied except for the following six items, crude oil (5%), natural gas (8%), teak/ its processed products (50%), jade/ ruby/ sapphire/ emerald/ diamond/ other gemstone (15%), jewelry made of these gemstones (5%), electronic machinery (8%).</p>

Source: Compiled from JETRO, the Ministry of Commerce, Customs Department

(3) Foreign exchange management system

Myanmar has realized substantial policy improvement and development in the recent years, but still has operational issues, for example, in settlement by L/C system, foreign remittance of non-trade transactions.

Subject	Explanation
Laws concerned	Central Bank Law (2013), Amended Foreign Exchange Control Law (2012 and 2015)
Exchange rates management	Shifted to managed float system since April 2012. Foreign exchange can be dealt with by authorized commercial banks as well as state banks (since October 2011).
Foreign exchange service	Serviced by authorized 3 state banks and 15 commercial banks, enabling foreign remittance and L/C opening (as of 2016).
Money change service	Serviced by authorized 3 state banks and 15 commercial banks (as of 2016). Although no limit is set for deposition in foreign currency account, withdrawal is limited up to USD 5,000 at once and USD 10,000 per week.
Trade transaction	Accepting settlement by irrevocable L/C and telegraphic transfer (T/T). In case of T/T, the value of export from Myanmar (remittance to Myanmar) needs to be paid in advance, while the value of import

¹ EU, considering the human rights infringement in Northern Rakhain, has been reviewing a possibility to repeal the access to GSP (Everything but Arms: EBA scheme), as of October 2018. EU market has been contributing to the export market diversification of the agricultural and labor-intensive products of Myanmar, and has been strongly associated with the foreign investments in garment/ shoe industries which accommodate almost 10% of labor in Myanmar. A repeal of GSP would adversely affect the Myanmar's economy.

	to Myanmar (remittance from Myanmar) needs to be paid after delivery.
Non-trade transaction	Still difficult in remittance of non-trade transactions. However, the companies approved by MIC or SEZ (upon permit by the Central Bank) can remit profit overseas.
Capital transaction	Foreign investors who bring the foreign currencies can open the bank account at the authorized banks for foreign exchange. Previously, capital fund transfer was limited to 2 state banks, but currently open to commercial banks (including branches of foreign banks).

Source: Compiled from JETRO, the Central Bank

(4) Export/ Import procedure

As earlier stated, it is necessary to register as exporter or importer, and to be licensed for each traded item (many items still require prior licensing). Although those items to be licensed in advance has been considerably decreased in the recent years, there are only 983 items which do not require licensing for export, and as many as 3,988 items which still require licensing for import. Days necessary for licensing procedure has been largely reduced.

Subject	Explanation
Laws concerned	Export and Import Law (September 2012) and notifications of the MoC based on the law.
Exporter/ Importer Registration	<p>Trading business, after its establishment, shall register as exporter or importer at the Dept. of Trade of the MoC. Necessary documents include company registration certificate, articles of incorporation, stakeholders (equity participants) list, details of director/ controller and their change, business permit, guarantee on office establishment and office lease agreement on office, etc., passport of applicant or personal ID card (copy).</p> <p>Time: Previously taken one week, but currently reduced to one day.</p> <p>Fee: 200,000 Kyat (effective five years), 100,000 Kyat (two years), 50,000 Kyat (one year)</p> <p>Renewal: Re-application in advance (3 months).</p> <p>Needs to join UMFCCL for issuance of the certificate of origin. For fishery sector, needs to join the Fisheries Federation.</p> <p>Note: Processors for commission (such as garment industry) is entitled for tax exemption resultant from raw material import, if they register as CMP (Cutting, Making and Packing) business upon prior approval by MIC. It is impossible to additionally register as CMP business. CMP business also needs to register as exporter or importer, and join UMFCCL.</p>
Export/ Import License	Not required for export licensing for 983 items (since August 2014), while required for import licensing for 3,988 items (as of December 2016) being the negative list. Previously, needs to be licensed at the head office in NPT, but currently available in regional branches since October 2011 except a part of imported items. Procedure for licensing has been simplified and liberalized in stages.
Export procedure	<p>Export licensing: Except the exempted items, needs to be licensed for each exported item.</p> <p>Necessary doc.: largely reduced to the following documents since August 2014, declaration, proforma invoice (or sales contract), recommendation from the ministry/ agency concerned. CMP business has been exempted from export licensing since March 2013.</p> <p>Application: the MoC or its desk at DICA's one-stop-center</p> <p>Time: Normally 1~3 days from allocation to issuance.</p> <p>Effective period: 3 months in principle.</p> <p>Fee: 2,500 Kyat</p> <p>Assessment of declared export value: Validation assessment of export value, by referring to the MoC's own price database was abolished in November 2016. Applicants by themselves need to certify the value.</p>
Customs (export)	<p>The following documents shall be submitted to Customs Department with export declaration, export license (not necessary for exempted items), L/C or advice of payment, commercial invoice, packing list, sales contract, booking note, product sample (if necessary), recommendation (if necessary) / permit on export item, company certificate (copy), exporter/ importer registration certificate (copy), certificate of origin (if necessary), receipt of advance income tax. Further, needs to obtain irrevocable L/C equivalent to export value or receive T/T in advance.</p> <p>To benefit from the special preferences of importing partner using EPA/ FTA, it is necessary to obtain the certificate of origin at the MoC with bill of lading, etc. after customs clearance and loading.</p>

Import procedure	<p>Import licensing: Except the exempted items, needs to be licensed for each imported item, and needs to be permitted by the supervising ministry/ agency. It is noted that the procedure and its operation are sometimes amended without prior notice in documents.</p> <p>Opening bank account: Needs to open the foreign currency account at the foreign exchange banks.</p> <p>Necessary doc.: largely reduced to the following documents since August 2014, declaration, proforma invoice (detailing specification of item, packaging form, date of delivery), recommendation from the ministry/ agency concerned, sales contract. Document explaining the objective of usage may be attached for facilitation of the procedure.</p> <p>Application: the MoC or its desk at DICA's one-stop-center</p> <p>Time: Normally 1~3 days from allocation to issuance.</p> <p>Effective period: 3 months in principle.</p> <p>Fee: calculated based on CIF value (at landed) of import item</p> <p>Assessment of declared import value: Validation assessment of export value, by referring to the MoC's own price database was abolished in November 2016. Applicants by themselves need to certify the value.</p> <p>Fined, in case the intended cargo arrives at port before being licensed, and required for re-issuance in case the intended cargo does not arrive before 'Last date of import' stipulated in the license.</p> <p>Although CMP business is exempted from export licensing, not from import licensing. In case of import by garment industry, recommendation by the garment manufacturers association (MGMA) was required previously, but currently not anymore.</p>
Customs (import)	<p>Starting clearance upon settlement at the banks in Myanmar (L/C issuing banks, dealing with foreign exchange) and showing shipping documents.</p> <p>Although shifting to self-assessment system (invoice-based valuation), Customs Department exercises the caution on declaration with 'under value' and still therefore, still determines the taxable value by referring to own price data compiled from the past import prices.</p>

Source: Compiled from JETRO, the Ministry of Commerce

3. Trade Policy and Legal and Regulatory Development on Trade

While the National Comprehensive Development Plan (NCDP) is being finalized, the GoM adopted the Framework for Economic and Social Reforms (FESR) in the late 2012, which then stresses the importance of liberalization of trade and investment. The FESR envisions value-added processes for primary commodities and diversification of export products as the key objectives of trade policy, and commits to the trade facilitation through setting-up of National Single Window and removal of tariff/ non-tariff barriers and development of support services for trade finance and market access.

As the GoM has been undergoing economic reforms, trade related laws have been revised or replaced. In particular, the Export and Import Law, promulgated on 7 September 2012, replaced the aged law of control of import/ export (1947). Implementing rules/ regulations of the Export and Import Law are not yet announced by the MoC. Furthermore, the GoM has prepared other trade related laws concerning such as foreign exchange management (2012/ 2015), safeguard (2015), essential supplies and services (2012), consumer protection (2014), amended sea/ land customs acts (2015), competition (2015).

While the rules/ regulations of the Export and Import Law is not available, the MoC has been issuing many notifications to respond to the needs for the improved trade facilitation and reasonable trade management. Among them, more significant is concerning relaxation of trading permit regime to foreign companies, relaxation of trade licensing regime, and simplification of the licensing procedure.

4. Major Issues of Trade-related Policies

The MoC considers that aged laws, rules and regulations less transformed into reality and unpreparedness of trade-related policies have been obstacles to further expansion of trade, and recognizes the major issues in the trade business environment of Myanmar;

- Disturbed trade activities due to the rules/ regulations less transformed into the actual trading practices and cumbersome procedures
- Largely restricted trading opportunities and activities to foreign companies

- Cumbersome cross-border trading due to transshipment of container and overlapped customs clearance

Stakeholders actively advocating trade-related policy development and improvement includes the UMFCCI, industrial associations, foreign companies, a few donors as well as the MoC as an authorizing ministry and Customs Department of the MoF. Usually, the opportunity for dialogue between private and government sectors and the subsequently working group for key topics are established, where the policy/ regulatory issues and initiatives/ action for improvement are delivered to the government side, and followed-up for the responses from the administration².

Foreign and domestic private sector in Myanmar, experiencing the problems faced through the actual business operation, have regarded i) restrictions to foreign companies in trading business, ii) unconformity to the WTA agreement in customs clearance practices, iii) constrained mutual transporting system in cross border trading as central issues of trade-related policies, and demanded the improvement actions/ measures for the following issues to the administration side.

Issue	Recommendation with explanation
Restricted trading business permit to the foreign companies	Proposed to grant foreign companies with trading business permit on increased number of item, allowing joint-venture with local companies at least. Foreign companies currently rely on Myanmar partners in handling import except a few limited items. On the other hand, a notification (No.5 May 2017) Myanmar Investment Commission (MIC) has allowed foreign companies or JVs to engage in domestic wholesale and retail (except scale of minimart or convenience store) businesses as far as the MoC permits.
Closed licensing regime both for export and import	Proposed to apply the negative list for import licensing to a very limited number of items with security concerns, etc., and to exempt submission of recommendation letter from the ministries/ agencies concerned which causes extra cost and time.
Un-harmonized rules between authorities on import license	Proposed to make rules of import license well harmonized between MoC and Customs Department. For example, Customs introduces the fine to vehicle components importer for not being licensed, although MoC advises to lift the licensing requirement for this item.
Un-conformed customs clearance practice with the WTO standards	<p>Proposed to introduce the invoice-based valuation instead of the prevailing practice before starting MACCS, since the valuation is dependent on the customs officers' individual discretion, causing unreasonable customs duty payment.</p> <p>Also, proposed to discontinue re-examination by the Mobile Team, since the separate channel system for customs clearance works well, and re-examination by the team takes one whole day and cost importers extra expenses.</p> <p>Also, proposed to ensure smooth, transparent and predictable customs procedure (including the exemption of Bank Certificate as required document), since the procedure is deemed lengthy and complex, consisting of 15 steps at the head office and the wharf with many other intermediate steps.</p>
Poor capability of the stakeholders engaged in customs clearance	<p>Proposed to urgently and periodically conduct training for customs agents/ brokers, since the customs broking are serviced by many non-licensed agents causing complication in handling and pop-up of unnecessary setbacks.</p> <p>Also, proposed to train and appoint more qualified customs officers at the valuation section in Customs Department, since the case handling in the section is slow and time-consuming.</p>
Unreasonable assessment of taxes on imported items	<p>Proposed to ensure reasonable commercial tax assessment according to the Tax Law based on the invoice value of imported items, since the prevailing practice leads to double taxation.</p> <p>Also, proposed to grant new vehicle import (duty free) with AFTA preference, and stop calculating domestic taxes based on FOB + 120% shown in the Form-D (certificate of origin).</p>

² Among them, Myanmar-Japan Joint Initiative (MJJI) and Myanmar Business Forum (MBF) are highlighted. MJJI has been functioning as a forum of public-private dialogue on concrete measures toward development of business and investment environment of Myanmar, since May 2013. Japan Chamber of Commerce and Industry, Myanmar (JCCM), together with the Embassy of Japan, JETRO and JICA, has actively participated in the dialogue.

MBF as a private partner in the dialog between private and government which aims at facilitating the improvement of business/ trade environment, was formulated by the UMFCCI in February 2014. MBF comprises of seven WGs. Among the WGs, one for investment & trade discusses trade regulation/ procedure, customs clearance, company registration, access to finance, food/ drug import. MBF is expected to drive the government's effort toward the environmental improvement through the regulatory reforms, accordingly holds the regular meeting with the MoC-led Taskforce for Trade and Business Promotion (a dialogue partner of the government side and a focal point among the ministries concerned with trade and business) to recommend actions to the government.

Cumbersome logistics and customs clearance system in the cross-border trading	<p>Bonded system is not legally stipulated. Accordingly, proposed to enact rules/ regulations concerning the bonded warehouse/ transportation under the Customs Law, establish bonded warehouse/ transportation system outside port/ airport. Without such facilities, imported cargo takes the longer time for customs clearance, and advance payment of tariff and other expenses are incurred.</p> <p>Also, proposed to expand the warehouse at airport, since the space for accommodating cargos under clearance is quite limited, causing cargos kept in open space and damaged. This is also true in case of cold storage facility at airport.</p> <p>Also, proposed to enter the agreement with the authorities in the neighboring countries concerning cross-border trade facilitation, for example, introduce double vehicle license system, establish bonded system at borders (to skip/ streamline customs inspection), shift from total to sample cargo inspection, and expand MACCS system to land border trading. In entering Myanmar, cargo container needs to be transferred into different truck with one-by-one inspection.</p>
Lengthy and cumbersome procedure of Food & Drug Administration (FDA) certificate	<p>Proposed to make FDA well equipped for testing/ inspection and reduce the quantity of sample inspection. The existing facilities are poorly equipped causing congestion and delay in issuing the certificate for import endorsement.</p> <p>Also, proposed to make FDA perform its laboratory test only for items containing hazardous materials, since FDA does for all import items without discrimination to the lower risk products, and to make FDA issue the single certificate for the same products but packaged in different size.</p> <p>Also, proposed to make FDA accept Free Sales Certificate (FSC) for imported products for its approval of import endorsement as done in other ASEAN countries, instead of requiring the detailed data of ingredient composition (chemical and micro-biological contents).</p>
Unclear documentation requirement for application of FDA certificate	Proposed to make FDA prepare the guideline concerning required documents for application of FDA certificate, since no such a reference is available and FDA officers sometimes requested extra documents.

5. Initiatives for Development and Improvement of Trade-related Policies

In response to the voices from private sector for the obstacles in expanding trade, the GoM has taken important initiatives for the liberalization and relaxation of trade-related policies, and the revision of rules/ regulations in a step-wise manner. Among the major improvements are raised as follows.

Granting of trading business permit to foreign companies

- Foreign companies were not previously permitted to import and sell new vehicle (including motorbike). The MoC issued a notification (No.20/ 2015) which allows the joint-venture to sell new vehicle as far as they have the showroom facility, however some restrictions remain such as those concerning type/ model year of vehicle. The GoM is requested to further relax such restrictions soon.
- The GoM has partially opened the trading business to the foreign companies but still limited to fertilizer, seeds, insecticide, medical equipment since November 2015, and construction materials since July 2016 through joint-venture. As for construction materials, the GoM decided to allow the foreign contractors (including their branch) to import them necessary for their projects³. Subsequently, the MoC has issued a notification (June 2017) which permits 100% foreign companies to be registered for trading of these 5 goods⁴. In addition, the MoC finds the revised definition of domestic/ foreign capital companies upon the new Company Act (December 2017) as a further move to deregulate the entry of foreign company to trading⁵.

Relaxation of trade licensing regime

³ However, the GoM is further expected to i) review the regulation which limits import amount less than 75% of the importer's capital, ii) clarify this on whether the said limit of import amount is applicable for annual value of transaction or each transaction, and iii) indicate the list of subject equipment/ material.

⁴ A MIC notification (No.15, 2017) issued under the new Investment Law noted that the investments which make export/ import shall perform in accord with the policy of MoC, indicating little chance of relaxing the regime of exporter/ importer registration to the foreign companies for other commodities at least in the short-term.

⁵ The new Company Act defines those companies accepting more than 35% foreign capital as foreign company, and those less than 35% as domestic one. Previously, any companies with even 1% of foreign capital was treated as foreign company.

- In 2012, Myanmar began to reform its non-automatic import licensing regime. Previously, importers of all items need licensed (non-automatic system). In April 2013, import licensing requirement for over 1,928 tariff lines (equivalent to 166 commodities) were abolished.
- In 2015, the GoM switched to "negative list" approach (partially automatic-licensing, in other words) which stipulates 4,405 item requiring import license. However, this figure is deemed still extraordinary, compared to other ASEAN countries. The GoM further decided to lift 267 items (accounting for 54% of the national import amount) from the list of those requiring import license in August 2016, and further lift 150 items in December 2016.
- In 2014, the GoM liberalized export licensing regime as well, lifting 983 items from the list of those requiring export license.
- Some documents necessary for trade licensing was exempted to ease the procedure (including the exemption of bank certificate as a proof that exporter is paid for the exported items prior to physical delivery). Further, the license become available not only at the head office of MoC but also branches. It is notable that tenants in Thilawa SEZ are exempted from duty of obtaining such licenses.

Relaxation of the formerly restricted items

- The GoM relaxed the formerly restricted import items including vehicle, palm oil, fuel, monosodium glutamate, soft drink, biscuits, prepared canned food and fruits, instant noodles, and further wine (formerly prohibited except for hotels, duty free shops).
- The GoM also relaxed some formerly restricted export items such as cotton.

Introduction of invoice-based taxation

- Customs introduced the invoice-based taxation in accordance to the WTO valuation and commenced the operation of new customs/ port clearance system (MACCS) in November 2016. It has been claimed for the time being that customs had still employed the previous practices at the actual valuation at site. However, the valuation is reported to be shifted to the invoice-based practice, upon the official instruction of the transport minister on September 13, 2017.

Prompt and smooth customs clearance

- The MoC exempted the submission of approval letter by Myanmar Garment Manufacturing Association (MGMA) for CMP exports since January 2014.
- The MoC has also abolished its re-examination during customs clearance by the Mobile Team since December 2015, which had caused lengthy process of customs clearance.

Abolishment of commercial tax on the proceed of export earning

- Commercial tax on the proceed of export earning was abolished, except only five commodities (gemstone, gas, crude oil, teak and timber) since August 2011.

Facilitation of cross-border trade

- The MoC has established the Joint (Border) Trade Committees with the neighboring countries (Thailand, India, Bangladesh, China, Lao PDR) to discuss the bilateral trade facilitation and promotion on a regular basis.
- The MoC has upgraded the functions of Trade Zones in Muse and Myawaddy, and opened additional Trade Posts in the border area.

Foreign participation to retail/ wholesale businesses

- The MoC in May 2018 has announced a notification to allow foreign companies (including their JVs) to participate into retail/ wholesale businesses in Myanmar, in view of enabling the provision of the competitively-priced commodities to consumers through ensuring sound competition. This was followed by an issuance of the Standard Operating Procedure (SOP) on the business registration, and the list of commodities for transaction in July 2018. The SOP addresses the registration procedure, minimum investment requirement, size of shop space, validity period of registration.
- The list of commodities allowed for transaction by foreign companies is shown below:

1	Consumer goods (inc. apparel, horologe, cosmetics)	10	Communication devices (inc. camera, telephone)
2	Food products (including the below)	11	Electronic products

	a. agri-product (except those not allowed for import-sales)	12	Construction materials and equipment
	b. fishery product	13	Electrical products
	c. livestock product	14	Chemicals for industry usage
	d. ready-to-serve food	15	Seeds and agricultural inputs
	e. beverage	16	Agricultural equipment and tools
	f. domestically produced alcohol	17	Machinery and related products
3	Housewares (inc. porcelain, earthen ware, glassware)	18	Bicycle
4	Kitchen utensils	19	Motorcycle and related products
5	Drugs, medical devices, equipment for hospital	20	Automobile parts and machinery parts
6	Animal feed, drugs for veterinary	21	Toys
7	Stationary	22	Home decorated materials (inc. flowers, plans)
8	Furniture	23	Various types of gifts and handicrafts
9	Sport equipment	24	Art, music instrument and related products (except antique)

Source: The Ministry of Commerce

6. Recommendations for Trade-related Policies towards Investment Promotion of Export-oriented Industry

Even though the GoM has taken some influencing actions to the improvement of trade-related policies, as summarized above, the private sector (local companies, industrial associations, and foreign companies which have already invested in Myanmar) voices the needs of further actions for deregulation to the GoM, particularly on the granting of trading business permit to foreign companies, relaxation of trade licensing regime, smooth and prompt customs clearance. Recommended actions for the regulatory relaxation and improvement are summarized as below.

1) Further relaxation of trading business permit regime to foreign companies

The GoM is expected to further relax the trading business permit regime so that foreign companies engage in trading many items. The existing regime inhibits those foreign manufacturers oriented to domestic market from begin their operation with import-sales, although they can import materials/ components and export the processed products. It is because they usually want to demonstrate the local market through import-sales of their own products before making decision to locally manufacture or not. This is also the case for the investors in retail sector, where they are permitted only to sell the merchandise but not to procure them from overseas.

It is also claimed that many foreign manufacturers are not highly motivated to invest, since they face difficulty in proceeding their alliance with trading companies in procuring production facilities, components as well as marketing their products (both locally and overseas). Business alliance with trading companies is deemed key factor especially for Japanese companies in making decision on investment and facilitating/ developing the business overseas.

2) Further relaxation of trade license regime

The GoM is expected to further relax the trade license regime in view of extending export/ import items of the automatic licensing. The private sector also proposes that the license fee be flatly charged per application since the MoC charges the license fee based on the commodity value to be traded. Further, validity of the license lasts only 3 months, being deemed short depending for the period of the project/ trade contract. Accordingly, the GoM is expected to grant the validity period of the half-year or one year at least, or the period in accordance to the project/ trade contract.

3) Smoother and more prompt customs clearance

The GoM is expected to further streamline the customs clearance requirements and processes, by way of i) exempting some documents to be submitted (for example, exemption of original import license submission, in order to enable parallel processing of both air and ship cargos), ii) extending the coverage of MACCS and the resultant paperless procedure, iii) ensuring a complete shift to the invoice-based valuation of tariffs/ taxes, iv) accepting surrendered B/L or Sea Waybill for receiving cargos imported from close-range countries like Thailand, v) remedying the inconsistent practices, and vi)

standardizing the actually prevailing practices which varies among the stakeholders (customs officers and brokers), through capacity building and placement of the trained officers.

4) Clarification and further relaxation of foreign exchange regulations

The GoM is expected to further clarify the rule and procedure concerning overseas remittance in accordance to the Foreign Exchange Management Law with establishing the consultation window which shall handle any inquiries from the private sector. For example, when investors transmit foreign currency upon machinery import for production purpose, the bank dealing with foreign exchange sometimes request the importer to obtain license beforehand, which is not deemed necessary practice. The GoM is also expected to relax the existing limit of cash withdrawal (up to USD 5,000 at once, not more than twice a week), at least back to the previous amount (USD 10,000 a day).

5) Further facilitation of cross-border training

The GoM is expected to further ease and facilitate cross-border trading, by way of i) introducing double license system with which cargo trucks are permitted to cross the land border without transshipment or allowing to do so by changing their tractor heads⁶, ii) establishing bonded warehouse/ transportation system of international standard outside seaport/ airport and further streamlining the customs inspection to enhance the handling capacity of incoming cargos, with enacting rules/ regulations concerning the bonded warehouse/ transportation under the Customs Law, and iii) extending the coverage of MACCS and adopting a sampling-based cargo inspections at the major cross-border customs.

6) Establishment of internationally accredited food inspecting institution (laboratory)

The GoM is promptly expected to establish the internationally accredited food inspecting institution, or improve the existing one to such a level, especially the testing laboratory on agricultural residue in agro/ fishery products, to avoid the local exporters from sending their samples to those institutions in Thailand before forwarding, which causes extraordinary time and expenses compared to the shipping from Thailand.

7) Smoother and more prompt FDA certificate procedure

The GoM is expected to make FDA i) well equipped for testing/ inspection and reduce the quantity of sample inspection, ii) perform its laboratory test only for hazardous items and issue the single certificate for the same products but packaged in different size, iii) accept Free Sales Certificate (FSC) for imported products for its approval of import endorsement as practiced in other ASEAN countries, and vi) prepare the guideline concerning required documents for application of FDA certificate.

⁶ A bilateral agreement between Thai and Myanmar (scheduled to be signed in December 2017) would enable containers/ chassis to be mutually accessible cross the border from 2018 (while tractor heads need more time).

Trade-related notifications issued by the MoC in the recent years (only the relevant ones)

Notification	Contents
No.16,33,72/2013, No.38/2014	An announcement to exempt trade licensing requirement for some export and import items.
No.8/2013, January	An amended announcement to restrict importing alcohol, beer, cigarette, other prohibited goods.
No.9/2013, February	An announcement to allow importing chewing gum, cakes, wafer, chocolate.
No.23/2013, March	An announcement to lift trade licensing requirement for the machinery used for gas/ petroleum production for JVs between foreign companies and the Ministry of Energy.
No.11/2014, February	An announcement to exempt 983 items from export licensing, although all the items were to be licensed previously.
No.14/2014, March	An announcement to allow export of cotton and cotton-made materials.
No.60/2014, November	An announcement to allow using both countries' currencies or US dollar for trading in the border with China, India, Thailand with making sales tax levied based on trade denominated currency.
No.19/2015, March	An announcement to allow only those importers of second-hand vehicles which has the sales center for selling imported second-hand vehicles.
No.20/2015, March	Announcement to allow only those importers of new vehicles which has the showroom for selling imported new vehicles, with addressing other necessities concerning insurance for vehicle, availability of spare-parts and workshop for after-service.
No.69/2015, July	An announcement to introduce negative list approach which specifies the subject items required for import licensing, replacing positive list approach which specifies only the non-required items for licensing. As a result, the past notifications (No.16,33,72/2013, No.38/2014) become nil.
No.88/2015, September	An announcement to make some of import items that were lifted for import licensing (by Notification No. 69/2015) required for license application again, including sodium nitrate, other-for toilet use including medicated products, surgical.
No.96/2015, November	An announcement to allow foreign JV companies to perform trading activities of the following four items that play a critical role in agriculture and public healthcare sectors, including fertilizer, seeds, pesticides and medical equipment.
No.9/2016, February	An announcement to enforce the rules concerning usage of self-certification system for export manufactures to certify their goods, that is one of the requirements for the certified exporters.
No.17/2016, February	An announcement of the advance income tax associated with trade. Exporter shall pay 2% of the export value for income tax. Income tax will be charged also on import items with 2% of the assessed value.
No.32, 33/2016, April	An announcement to enforce the rule for the new vehicle importer to sell at their showroom premises (private) and car trade center (official).
No.56/2016, July	An announcement to allow foreign JV companies to perform trade (wholesale and retail) activities of building materials, in accordance to the increased needs for contractors to utilize quality building materials.
No.60/2016, August	An announcement to lift 267 items from the list of those requiring import license (4,405 in total), covering general machinery/ electric equipment (182 items), copper/ aluminum/ their product (44), etc., which accounted for 54.1% of total import amount.
No.62/2016, August	An announcement to exempt the following items (sesame oil, mustard seeds/ oil, sunflower seeds/ oil, oil mill, and shrimp bran) from the subject of export license, which have been previously restricted for export.
No.74/2016, November	An announcement concerning the issuance of export/ import license, in view of smoothing trade procedures and ensuring trade activities in accordance to the law. The MoC will not check the value of subject items for import/ export licensing anymore, and then applicants are required to validate the value of the subject items. Export license shall be issued based on the submitted invoice and the price as stated in the sales contract.
No.75/2016, November	An announcement to abolish the limit on the fund amount to be utilized by joint-ventures (for trading activities) for their business operation. Previously, joint-venture trading companies must declare the fund amount which they intend to bring into Myanmar to the Central Bank. Then, the MoC would regard the amount as a limit for those trading companies to utilize.

No.85/2016, December	A follow-up announcement to specify HS code lines for the previously-relaxed items for trading by joint-venture, i.e., medical equipment (69 items) and construction materials (461 items).
No.86/2016, December	An announcement to further add the commodities (150 items) which don't require import license, following the Notification No.60/2016, i.e., deletion of those items from negative list.
No.14/2017, February	An announcement of the rules concerning the extension of period of imported used-machines.
No.15-17/2017, February	An announcement of the rules that importers of vehicles, construction heavy machinery can sell only at their own sales centers or showrooms.
No.36/2017, June	An announcement to allow (100%) foreign companies to perform trading activities of the following five items including fertilizer, seeds, pesticides, medical equipment and building materials, on some conditions.
No.37/2017, June	An announcement to lift items of equipment for airport ground services from the list of those requiring import licensing.
No.38/2017, June	An announcement that If the MoC finds the false report by the company on the values of invoice and sale contract, the MoC shall check the value of subject items for import/ export licensing according to a previous practice (follow-up to the notification of No. 74/2016).
No.49/2017, October	An announcement to permit the export of cow and buffalo.
No.55/2017, November	An announcement to allow the import/ trading of agricultural machinery/ equipment to the foreign JVs in accordance to the existing stipulations for enhancing agricultural production.
No.60/2017, December	An announcement to amend the product lines (1,079 in total) in accordance to the HS Code 2017 from the previous product lines (983 in total), which needs application for export license.
No.61/2017, December	An announcement to amend the product lines (4,818 in total) in accordance to the HS Code 2017 from the previous product lines (3,988 in total), which needs application for import license.
No.63/2017, December	An announcement to add HS Code for construction materials to be imported by foreign companies and their JVs.
No.1/2018, January	An announcement to allow the industrial companies including SMEs (established since 2015) to import used machinery up to the year 2018, to lower their investment costs.
No.7/2018, January	An announcement concerning foreign trading of gold, jewelry, products made of gold, and related equipment and materials.
No.8/2018, January	An announcement concerning the exports of high quality local products produced by foreign investors in association with Myanmar citizens.
No.9/2018, February	An announcement of the latest product lines (3,345 in total) subject to the export license (Export Negative List) in accordance to the 10-digit HS Code 2017.
No.25/2018, May	An announcement to allow the foreign companies (including their JVs) to participate into the retail/ wholesale businesses in Myanmar.
No.32/2018, June	An instruction to follow the practice of the Registered Exporter System (RES) according to the GSP for European countries, Norway, Switzerland and Turkey.
No.57/2018, December	An announcement to allow the imports of office equipment/ related items for foreign companies (including their branches) and non-governmental/ international organizations.

Appendix 14:

Investment Promotion Mission to Japan

Contents of Appendix:

1. Schedule of Investment Promotion Mission
2. List of Mission Members
3. Courtesy Call and Business Dialogue
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6. Photos
7. Presentation Material at Seminar: “THE NEW INVESTMENT REGIME IN MYANMAR” (U Aung Naing Oo, Secretary of MIC and Director General of DICA)
8. Presentation Material at Seminar: “Thilawa Special Economic Zone” (Mr. Takashi Yanai, President and CEO of MJTD)

1 Schedule of Investment Promotion Mission

A Myanmar investment promotion mission to Japan was officially dispatched to Japan for 7 days, from May 28 to June 3 2017. A whole schedule of the mission is shown in the following table.

Date	Activity	Place	Stay
Sun, 28 May		Lv. Yangon International Airport	
Mon, 29 May		Ar. Narita International Airport	Tokyo
	Courtesy call	Keidanren (Japan Business Federation)	
	Dialogue	Japanese companies (Keidanren member companies)	
Tue, 30 May	Site Visit	NYK Tokyo Container Terminal (Operated by NCT and Uni-X)	Tokyo
	Site Visit	Ohi Logistics Center (Operated by Uni-X)	
	Site Visit	Aijinomoto Kawasaki Plant	
Wed, 31 May	Courtesy call	JCCI (The Japan Chamber of Commerce and Industry)	Tokyo
	Seminar	Myanmar Investment Seminar in Tokyo	
		Business card exchange	
Thu, 1 June		Lv. Tokyo/ Ar. Osaka	Osaka
	Courtesy call	Kankeiren (Kansai Economic Federation)	
	Seminar	Myanmar Investment Seminar in Osaka	
		Business card exchange	
Fri, 2 June	Site Visit	Kubota Sakai Plant	Osaka
	Site Visit	Konoike Transport Co., LTD. Ajigawa Warehouse	
Sat, 3 June		Lv. Kansan International Airport	

2 List of Mission Members

The mission members were selected from Myanmar Investment Commission (MIC) and Directorate of Investment & Company Administration Office (DICA). The members of the mission are shown in the following table.

No.	Name	Role in MIC	Title
1	U Aung Naing Oo (Mr.)	Secretary	Director General, DICA, Ministry of Planning & Finance
2	U Khin Maung Yi (Mr.)	Member	Permanent Secretary, Ministry of Natural Resources & Environmental Conservation
3	U Toe Aung Myint (Mr.)	Member	Permanent Secretary, Ministry of Commerce
4	U Htay Chun (Mr.)	Member	-
5	Daw Mya Thuza (Ms.)	Joint Secretary	-
6	U Myo Khaing Oo (Mr.)	-	Director, Sagaing Regional DICA Office
7	Dr. Marlar Myo Nyunt (Ms.)	-	Director, Investment Promotion Department, DICA, Ministry of Planning & Finance
8	Daw Khin Myo Myat (Ms.)	-	Assistant Director, Ministry of Planning & Finance
9	U Saw Myat Htun (Mr.)	-	Assistant Director, DG's Office, DICA, Ministry of Planning & Finance
10	Daw Ei Shwe Sin (Ms.)	-	Staff Officer, Investment Monitoring Division, DICA, Ministry of Planning & Finance
11	Daw May Su Myat Kay Aung (Ms.)	-	Staff Officer, Investment Promotion Department, DICA, Ministry of Planning & Finance

3 Courtesy Call and Business Dialogue

During the period, the mission visited the following three organizations for courtesy call as well as business dialogue with Japanese private companies.

Keidanren (Japan Business Federation)	
Attendants	<u>Courtesy call</u> Mr. Ken Kobayashi (Chair, Japan-Myanmar Economic Committee, Keidanren), and others <u>Business Dialogue</u> - Keidanren: Mr. Satoshi Mukuta (Senior Managing Director, Keidanren) and others - Member company: 24 participants (20 firms)
Agenda / Major comment	<ul style="list-style-type: none"> ➤ (Courtesy call) Opening remarks was delivered by Mr. Ken Kobayashi expressing an expectation to further strengthen the relationship between Myanmar government and Japanese companies, followed by an explanation of new investment law and current business/ investment environment in Myanmar by the mission. ➤ (Dialogue) Opening remarks was delivered by Mr. Satoshi Mukuta, followed by a presentation session by Secretary of MIC/ Director General, DICA on new investment regime in Myanmar. After that, the Japanese participants and the mission members exchanged views on tax incentives to be applied including its expansion, allowed business to foreign companies and definition of a foreign company.
JCCI (The Japan Chamber of Commerce and Industry)	
Attendants	<u>Courtesy call</u> Mr. Yoichi Kobayashi (Chairman, The Japan-Mekong Business Cooperation Committee, JCCI/ Vice Chairman, ITOCHU Corporation) and others
Agenda / Major comment	<ul style="list-style-type: none"> ➤ Opening remarks was delivered by Mr. Yoichi Kobayashi expressing an expectation to further strengthen the relationship between Myanmar government and Japanese companies, followed by an explanation of new investment law and current business/ investment environment in Myanmar by the mission. After that, various views were exchanged such as importance of infrastructure development, support to Japanese small and medium enterprises and SEZ development based on the suggestion letter submitted by JCCI delegation to the State Counselor of Myanmar in November 2016.
Kankeiren (Kansai Economic Federation)	
Attendants	<u>Courtesy call</u> Mr. Hideo Tashima (Chairman in charge of International Exchange, International Committee, Kansai Economic Federation/ Honorary Advisor, KONICA MINOLTA, INC.) and others
Agenda / Major comment	<ul style="list-style-type: none"> ➤ Opening remarks was delivered by Mr. Hideo Tashima expressing an expectation to further strengthen the relationship between Myanmar and KANSAI region, followed by an explanation of new investment law and current business/ investment environment in Myanmar by the mission. After that, various views were exchanged among the attendees such as advantages of Japanese companies, improvement of power supply in Myanmar and current progress/future plan of SEZ development in Myanmar.

4 Site Visit

Outline of company visits are shown in the following table.

May 30 (Tue.), Tokyo

NYK Tokyo Container Terminal (operation companies: NCT and Uni-X), arranged by Yusen Logistics	
Objective	To understand the logistics system in Japan for further promotion of logistics industry in Myanmar
Contents	<ul style="list-style-type: none"> ➤ Summary of facilities ➤ Inspection of carrying-in/ out system ➤ Inspection of container terminal management ➤ Q & A session
Ohi Logistics Center (operation company: Uni-X) , arranged by Yusen Logistics	
Objective	To understand the logistics system in Japan for further promotion of logistics industry in Myanmar
Contents	<ul style="list-style-type: none"> ➤ Summary of facilities ➤ Inspection of bonded warehouse and logistics management ➤ Q & A session
Ajinomoto Kawasaki Plant	
Objective	To understand the food processing production/ business
Contents	<ul style="list-style-type: none"> ➤ Summary of facilities ➤ Inspection of facilities: Umami Science Square, Hondashi production line, Cook Do production line ➤ Presentation on MSG ➤ Q & A session

June 2 (Fri.), Osaka

Kubota Sakai Plant	
Objective	To understand the production of agricultural machinery
Contents	<ul style="list-style-type: none"> ➤ Summary of facilities ➤ Viewing an introduction video of Sakai Plant ➤ Inspection of manufacturing process ➤ Q & A session
Konoike Transport Co., LTD. Ajigawa Warehouse	
Objective	To understand the business operation of bonded warehouse including distribution processing
Contents	<ul style="list-style-type: none"> ➤ Summary of facilities ➤ Inspection of bonded warehouse and logistics management ➤ Q & A session

5 Report on Myanmar Investment Seminar in Tokyo and Osaka

5.1 Outline of Myanmar Investment Seminar in Tokyo and Osaka

Myanmar Investment Commission (MIC), Embassy of Republic of the Union of Myanmar in Japan and Japan International Cooperation Agency (JICA) organized Myanmar Investment Seminar in Tokyo on May 31, 2017, and in Osaka on June 1, 2017. The outline of the seminar is described in Table 1 below.

Table 1 Outline of Myanmar Investment Seminar in Tokyo and Osaka

	Tokyo	Osaka
Date	May 31, 2017 (Wednesday) 14:00-17:15	June 1, 2017 (Thursday) 14:00-17:15
Venue	Ascot Hall, Hotel Okura Tokyo	Sanraku, Rihga Royal Hotel Osaka
Actual number of participants	540 participants in total: <ul style="list-style-type: none"> - Guests (including press): 28; - General participants: 485; - Mission Members: 11; and - Lecturers and organizers: 16. 	178 participants in total: <ul style="list-style-type: none"> - Guests (including press): 13; - General participants: 143; - Mission Members: 11; and - Lecturers and organizers: 11.
Organizers	Myanmar Investment Commission (MIC), Embassy of Republic of the Union of Myanmar in Japan, Japan International Cooperation Agency (JICA)	
Co-organizers	Japan External Trade Organization (JETRO)	
Supporters	Japan Business Federation (Keidanren), Kansai Economic Federation (Kankeiren), The Japan Chamber of Commerce and Industry (JCCI), The Bank of Tokyo-Mitsubishi UFJ, Ltd., Sumitomo Mitsui Banking Corporation, Mizuho Bank Limited	
Program	<p>14:00-14:10 <u>Opening Remarks</u> H.E. U Thurain Thant Zin, Ambassador, Embassy of the Republic of the Union of Myanmar (in Tokyo)/ U Toe Aung Myint, Member of Myanmar Investment Commission (MIC) and Permanent Secretary of Ministry of Commerce (in Osaka)</p> <p>14:10-14:30 <u>Keynote Speech: "Investment Promotion to Myanmar"</u> U Toe Aung Myint, Member of Myanmar Investment Commission (MIC) and Permanent Secretary of Ministry of Commerce (in Tokyo)/ U Khin Maung Yi, Member of Myanmar Investment Commission (MIC) and Permanent Secretary of Ministry of Natural Resources and Environmental Conservation (in Osaka)</p> <p>14:30-15:20 <u>Lecture: "The New Investment Regime in Myanmar"</u> U Aung Naing Oo, Secretary of Myanmar Investment Commission (MIC) and Director General of Directorate of Investment and Company Administration (DICA)</p> <p>15:20-15:40 Break</p> <p>15:40-16:20 <u>Panel Discussion: "Points of Myanmar Investment Law and Rules"</u> Moderator: Mr. Takafumi Ueda, Advisor for DICA Panelists: U Aung Naing Oo, Secretary of MIC and Director General of DICA Mr. Yoichi Matsui, JICA Expert Ms. Kana Manabe, JICA Expert/ Attorney Mori Hamada & Matsumoto</p> <p>16:20-16:40 Q&A Session</p> <p>16:40-17:10 <u>Lecture: "Thilawa Special Economic Zone"</u> Mr. Takashi Yanai, President and CEO of Myanmar Japan Thilawa Development Ltd. (MJTD)</p> <p>17:10-17:15 <u>Closing Remarks</u> Mr. Toshiyuki Nakamura, Director General of Industrial Development and Public Policy Department, Japan International Cooperation Agency (JICA) (in Tokyo)/ Mr. Kenichi Shishido, Director General of Kansai International Center, Japan International Cooperation Agency (JICA) (in Osaka)</p> <p>17:15-18:00 Business Cards Exchanging Meeting</p>	

Source: JICA Project Team

5.2 Contents of Seminar

Keynote Speech: "Investment Promotion to Myanmar"

U Toe Aung Myint, Member of MIC and Permanent Secretary of Ministry of Commerce, and U Khin Maung Yi, Member of MIC and Permanent Secretary of Ministry of Natural Resources and Environmental Conservation, delivered Keynote Speech titled "Investment Promotion to Myanmar" in Tokyo and Osaka, respectively. Firstly, they expressed their gratitude to Japanese Government for inviting them to Japan and making the seminar realize. Then, they explained that Economic Policy and Investment Policy of their Government is fitting to Japanese business by citing Japanese traditional business ethics, namely, "*San-Poh-Yoshi*". They emphasized that they treat investments of Myanmar citizens and those of foreign investors equally under new investment regime after Myanmar Investment Law. Finally, they expressed their commitment to make their business environment even more conducive to our investors, and thanked to JICA for their support on upgrading infrastructure, improving Government institutions, and developing human resources in the Government and the private sector.

Lecture: "The New Investment Regime in Myanmar"

U Aung Naing Oo, Secretary of MIC and Director General of DICA, made a presentation titled "The New Investment Regime in Myanmar" covering Myanmar Investment Law, Myanmar Investment Rules, Notifications and recent trend of FDI inflow to Myanmar. Regarding to Myanmar Investment Law, he explained about objectives of the law, role of MIC, investment requiring MIC Permit, restricted sectors, investors' rights and protections, investment guarantee, exemptions and reliefs, and settlement of disputes. Regarding to Myanmar Investment Rules, he explained about types of investment, investment screening, proposal assessment, endorsement application assessment, tax incentive application assessment, and land rights authorization application assessment, State/ Regional Investment Committee, investment facilitation, and investors responsibilities. Regarding to Notifications, he explained about designation of development zones (Notification No.10), classification of promoted sectors (Notification No.13), and list of restricted investment activities (Notification No. 15). Finally, he showed FDI inflow from Japanese related companies to Myanmar and way forward including New Companies Law in 2017 and Online Registry in 2018, and encouraged Japanese investors to contact to him directly. (Please refer to the end of this appendix for presentation material.)

Panel Discussion: "Points of Myanmar Investment Law and Rules"

Moderated by Mr. Takafumi Ueda, Advisor for DICA, three panelists, U Aung Naing Oo, Secretary of MIC and Director General of DICA, Mr. Yoichi Matsui, JICA Expert, and Ms. Kana Manabe, JICA Expert/ Attorney Mori Hamada & Matsumoto, discussed about "Points of Myanmar Investment Law and Rules".

At the beginning of discussion, U Aung Naing Oo emphasized i) the commitment to provide full and sufficient protection for investors, and ii) considering more liberalization as many cases as possible in Myanmar. Ms. Kana Manabe evaluated Myanmar Investment Law and Rules positively in that i) investors could know the restrictions by only referring to Myanmar Investment Law and Rules, and ii) that MIC Permit, land leasing and tax incentive

were divided. While she also evaluated Negative List positively, she pointed out i) that the guideline on how to get approval of relevant ministries (for restricted investment activities) is necessary, and ii) that it should be paid attention to the note of Negative List (“if the investments which make export/import shall perform in accord with the policy of Ministry of Commerce”). U Aung Naing Oo commented that ministries’ approval focused on technical aspect, and that Myanmar Government tried to pave the way for foreign investors’ import/ export business by liberalization. Ms. Kana Manabe also pointed out the necessity to clarify what would be included in restricted sectors requiring approval from Parliament. Mr. Yoichi Matsui explained about difference of restricted sectors, procedures and incentives between Myanmar Investment Law and SEZ Law.

Q&A Session

[Tokyo]

Question 1: What do you think about the vision to reform business environment (such as taxation) from now on?

Answer (U Aung Naing Oo): We are preparing to provide better aftercare services. Whatever you have any difficulties, you can anytime come to MIC office and complain issues not only tax.

Question 2: I would like to know the latest information of Dawei.

Answer (U Aung Naing Oo): Comparing the progress of Thilawa and Dawei SEZ, Dawei is a little bit slower. Dawei is the largest SEZ in Asia, and ambitious project in Myanmar. Therefore, financing is a bit question mark for Myanmar. Both Myanmar and Thailand Government cooperates well, and Japanese Government joined. Although the process is a bit a low, there will be more progress in near future.

Question 3: I would like to if Myanmar Government examines to reform income tax for foreigners staying in Myanmar for more than 183 days in order to avoid double taxation?

Answer (U Aung Naing Oo): Japanese Government is already proposing the bilateral agreement to address double taxation. We have similar agreement with Singapore and UK.

[Osaka]

Question 1: I would like to know if there is any restriction on acquisition of company fully-owned by Japanese under Myanmar Investment Law?

Answer (U Aung Naing Oo): If there already established the company with 100% foreign capital, that means MIC approved it, and you do not need to establish JV again.

Question 2: First, I would like to know if the investment application procedure under Myanmar Investment Law has already started or not? Second, I would like to know about long-term warehouse leasing and procedures when across the regions under Myanmar Investment Law.

Answer (Mr. Takafumi Ueda): The investment application procedure under Myanmar Investment Law has already started.

Answer (U Aung Naing Oo): If you want to lease land and warehouse for long term, at least you need to be endorsed. If the amount of investment is less than USD 5 million, you just go straight to Mandalay Regional Government for endorsement. Then, you can lease at least for 70 years in Myanmar for your business.

Lecture: “Thilawa Special Economic Zone”

Mr. Takashi Yanai, President and CEO of MJTD, made a presentation titled “Thilawa Special Economic Zone”. He explained about outline of Thilawa SEZ and the reasons why many companies decided to invest in Thilawa SEZ, focusing on attractiveness of Myanmar and infrastructure inside and surrounding SEZ. (Please refer to the end of this appendix for presentation material.)

5.3 Result of Pre-questionnaire Survey (before Seminar)

The JICA Project Team prepared the pre-questionnaire webpage in addition to entry webpage, and requested applicants for seminar to answer it before seminar. The result of pre-questionnaire survey is as follows:

■ Number of answers by applicants for seminar

The JICA Project Team got the answers from 81.9% of the applicants for the seminar in Tokyo, and 73.4% in Osaka, respectively, as shown in Table 2.

Table 2 Number of Answers by Applicants for Seminar

Response	Tokyo		Osaka	
	No.	Share	No.	Share
Responded	520	81.9%	130	73.4%
Not responded	115	18.1%	47	26.6%
Total	635	100.0%	177	100.0%

Source: Prepared by the JICA Project Team

■ Classification of business of applicants for seminar

The classification of business of applicants for seminar is as shown in Table 3. “Manufacture” is the largest group of applicants both in Tokyo (19.1%) and Osaka (26.6%), followed by “Trading (Shosha)” (17.3% in Tokyo and 14.7% in Osaka), “Research & consulting” (11.5% in Tokyo and 8.5% in Osaka), “Construction” (10.7% in Tokyo and 6.8% in Osaka) and “Transport and logistics” (8.0% in Tokyo and 7.3% in Osaka).

Table 3 Classification of Business of Applicants for Seminar

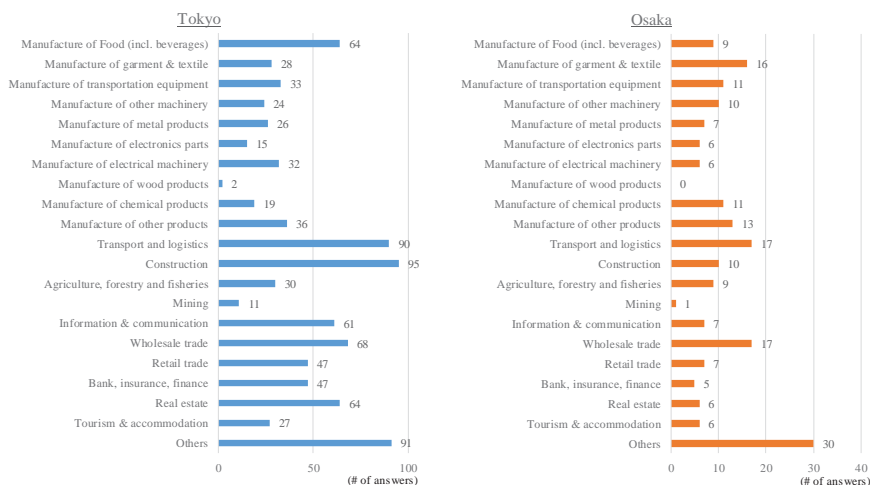
Classification of business	Tokyo		Osaka	
	No.	Share	No.	Share
Manufacture	121	19.1%	47	26.6%
Transport and logistics	51	8.0%	13	7.3%
Trading (Shosha)	110	17.3%	26	14.7%
Construction	68	10.7%	12	6.8%
Agriculture, forestry and fisheries	1	0.2%	0	0.0%
Mining	1	0.2%	0	0.0%
Information & communication	28	4.4%	4	2.3%
Wholesale trade	12	1.9%	6	3.4%
Retail trade	8	1.3%	3	1.7%
Bank, insurance, finance	46	7.2%	5	2.8%
Real estate	16	2.5%	4	2.3%
Tourism & accommodation	1	0.2%	7	4.0%
Research & consulting	73	11.5%	15	8.5%
Other services	37	5.8%	9	5.1%
Government and related agencies	24	3.8%	10	5.6%
Teacher & student	2	0.3%	2	1.1%
Others	36	5.7%	14	7.9%
Total	635	100.0%	177	100.0%

Note: Because the information on business classification is collected with other format, the answers from all applicants were collected (635 in Tokyo and 177 in Osaka).

Source: Prepared by the JICA Project Team

■ Investment area of interest of applicants for seminar

As illustrated in Figure 1, in Tokyo, “Construction” and “Transport and logistics” are the most interested investment area, followed by “Wholesale trade”, “Manufacture of Food (incl. beverages)”, “Real estate” and “Information & communication”. In Osaka, “Transport and logistics”, “Wholesale trade” and “Manufacture of garment & textile” is the most interested area of investment. “Others” include energy (oil & gas), infrastructure (such as power generation), and services (such as education and medical care).

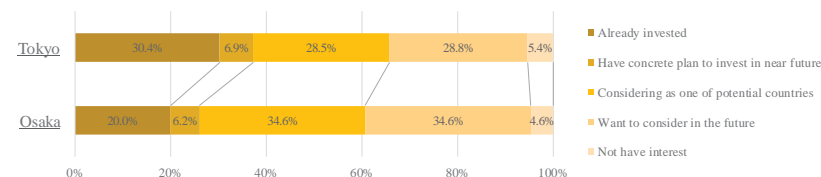


Source: Prepared by the JICA Project Team

Figure 1 Investment Area of Interest of Applicants for Seminar (multiple answers allowed up to three) (LH: Tokyo, RH: Osaka)

■ Plan of investment in Myanmar

Both in Tokyo and Osaka, more than half of applicants are considering Myanmar as one of potential countries, and 30.4% in Tokyo and 20.0% in Osaka have already invested to Myanmar as illustrated in Figure 2. It should be noted that there is a gap between “Already invested” and “Considering as one of potential countries”. This Investment Seminar is one of important tool to encourage investors to have concrete plan to invest in near future.

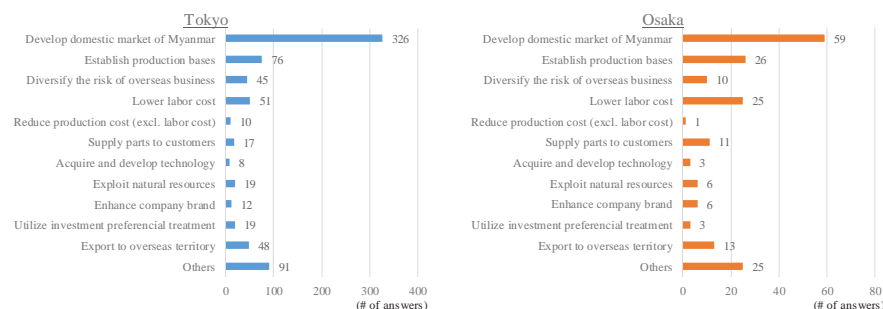


Source: Prepared by the JICA Project Team

Figure 2 Plan of Investment in Myanmar

■ Major reasons for implementing, planning and considering investment

Most applicants are implementing, planning and considering investment to Myanmar in order to develop the domestic market as illustrated in Figure 3. Some investors also intend to establish production bases and utilize lower labor cost.

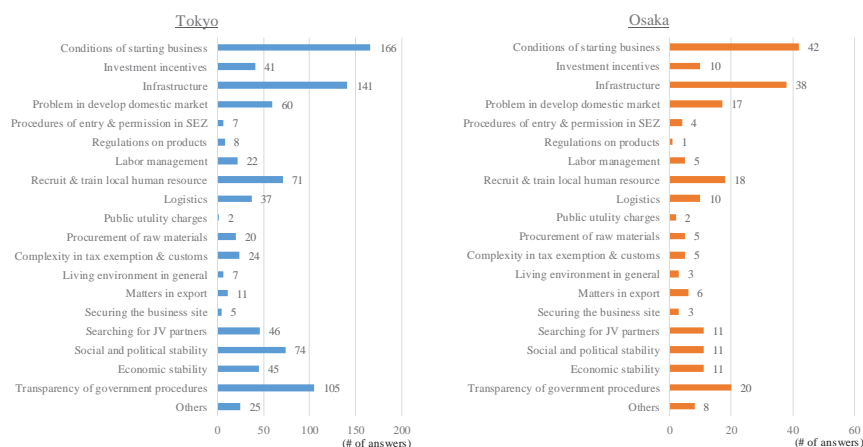


Source: Prepared by the JICA Project Team

Figure 3 Major Reasons for Implementing, Planning and Considering Investment (multiple answers allowed up to three) (LH: Tokyo, RH: Osaka)

■ Constraints on decision-making to invest

Both in Tokyo and Osaka, applicants pointed out “Condition of starting business” (including restrictions of foreign capital, land lease period, etc.) and “Infrastructure” (including electricity, water supply, etc.) and “Transparency of government procedures” as the constraints on decision-making to invest (see Figure 4).



Source: Prepared by the JICA Project Team

Figure 4 Constraints on Decision-making to Invest (multiple answers allowed up to three) (LH: Tokyo, RH: Osaka)

Information source of this seminar

Most applicants applied to this seminar through JETRO's announcement (45.2% in Tokyo and 38.5% in Osaka), followed by The Bank of Tokyo-Mitsubishi UFJ, Ltd., Sumitomo Mitsui Banking Corporation and Mizuho Bank Limited as shown in Table 4.

Table 4 Information Source of this Seminar

Information source of this seminar	Tokyo		Osaka	
	No.	Share	No.	Share
Japan Business Federation (Keidanren)	5	1.0%	0	0.0%
Kansai Economic Federation (Kankeiren)	0	0.0%	3	2.3%
The Japan Chamber of Commerce and Industry (JCCI)	7	1.3%	7	5.4%
The Bank of Tokyo-Mitsubishi UFJ, Ltd.	111	21.3%	22	16.9%
Sumitomo Mitsui Banking Corporation	53	10.2%	18	13.8%
Mizuho Bank Limited	48	9.2%	4	3.1%
Japan External Trade organization (JETRO)	235	45.2%	50	38.5%
Japan International Cooperation Agency (JICA)	30	5.8%	14	10.8%
Others	31	6.0%	12	9.2%
Total	520	100.0%	130	100.0%

Source: Prepared by the JICA Project Team

5.4 Result of Questionnaire Survey (after Seminar)

The JICA Project Team distributed the questionnaire for evaluation of seminar to the participants at the seminar.

The result of questionnaire survey is as follows:

Number of answers by participants for seminar

The JICA Project Team got the answers from 53.8% of the participants for the seminar in Tokyo, and 73.4% in Osaka, respectively, as shown in Table 5.

Table 5 Number of Answers by Participants for Seminar

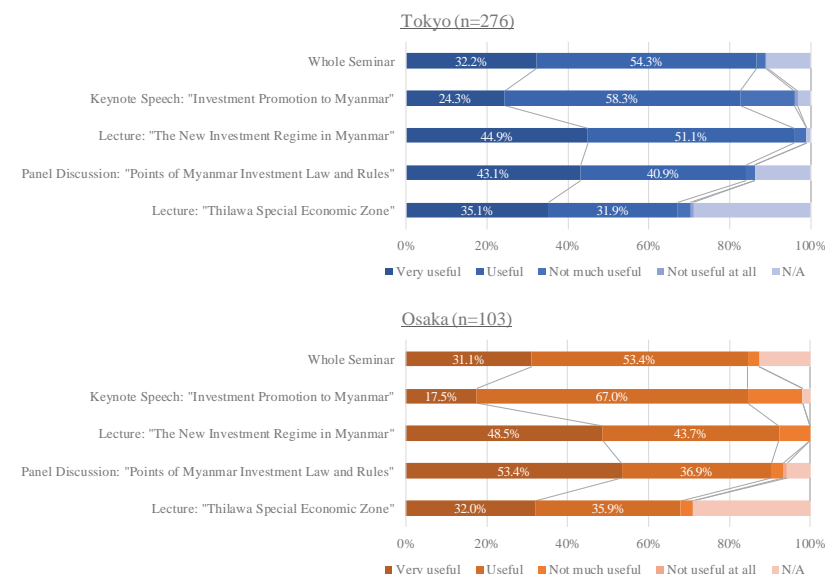
Response	Tokyo		Osaka	
	No.	Share	No.	Share
Responded	276	53.8%	103	66.0%
Not responded	237	46.2%	53	34.0%
Total	513	100.0%	156	100.0%

Note: The above total figure includes both guests and general participants.

Source: Prepared by the JICA Project Team

How do you think about usefulness of the seminar?

As illustrated in Figure 5, more than 80% of collected answers evaluated the whole seminar and most contents as "Very useful" or "Useful". Especially, it is assumed that most participants were satisfied at explanation on the new Myanmar Investment Regime presented by U Aung Naing Oo.

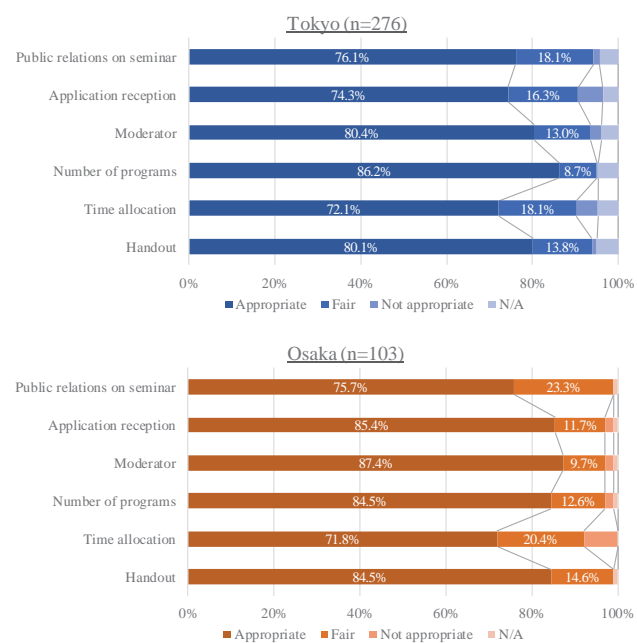


Source: Prepared by the JICA Project Team

Figure 5 Usefulness of the Seminar (Upper: Tokyo, Lower: Osaka)

How do you think about management of the seminar?

As illustrated in Figure 6, more than 70% of collected answers evaluated the management of the seminar was "Appropriate" in each aspect. Some participants pointed out the necessity to improve reception (in Tokyo) and time management and allocation.



Source: Prepared by the JICA Project Team

Figure 6 Management of the Seminar (Upper: Tokyo, Lower: Osaka)

6 Photos

Courtesy Call and Dialogue with Keidanren (Japan Business Federation) (May 29, 2017)



Dialogue with Keidanren



Business car exchange with attendants of dialogue

Tokyo NYK Container Terminal & Ohi Logistics Center (NYK Group) (May 30, 2017)

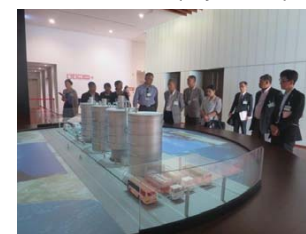


Observe Tokyo NYK Container Terminal



Visit the bonded warehouse in Ohi Logistics Center

Ajinomoto Kawasaki Plant (May 30, 2017)



Visit Umami Science Square



Presentation by Mr. Saito, Ajinomoto SEA Regional Headquarters

Courtesy Call to The Japan Chamber of Commerce and Industry (JCCI) (May 31, 2017)



Courtesy call to JCCI



Courtesy call to JCCI

Myanmar Investment Seminar in Tokyo (May 31, 2017)



540 persons participated in the seminar in Tokyo



Opening Remarks by H.E. U Thura Thant Zin, Ambassador, Embassy of the Republic of the Union of Myanmar



Keynote Speech by U Toe Aung Myint, Member of MIC and Permanent Secretary of Ministry of Commerce



Lecture by U Aung Naing Oo, Secretary of MIC and Director General of DICA



Panel Discussion



Q&A Session



Lecture by Mr. Takashi Yanai, President and CEO of MJTD

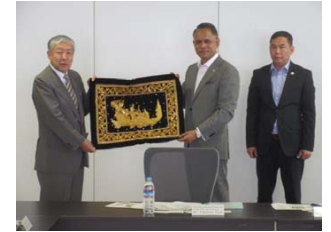


Business Cards Exchanging Meeting (Dr. Marlar Myo Nyunt)

Courtesy Call to Kankeiren (Kansai Economic Federation) (June 1, 2017)



Courtesy call to Kankeiren



Courtesy call to Kankeiren

Myanmar Investment Seminar in Osaka (June 1, 2017)



178 persons participated in the seminar in Osaka



Opening Remarks by U Toe Aung Myint, Member of MIC and Permanent Secretary of Ministry of Commerce



Keynote Speech by U Khin Maung Yi, Member of MIC and Permanent Secretary of Ministry of Natural Resources and Environmental Conservation



Lecture by U Aung Naing Oo, Secretary of MIC and Director General of DICA



Panel Discussion



Q&A Session



Closing Remarks by Mr. Kenichi Shishido, Director General of Kansai International Center, JICA



Business Cards Exchanging Meeting (U Myo Khaing Oo)

Kubota Sakai Plant (June 2, 2017)



Q&A Session



Present Investment Report to Kubota

Konoike Ajigawa Warehouse (June 2, 2017)



Observe distribution processing



Observe the damaged cargo area in warehouse

THE NEW INVESTMENT REGIME IN MYANMAR

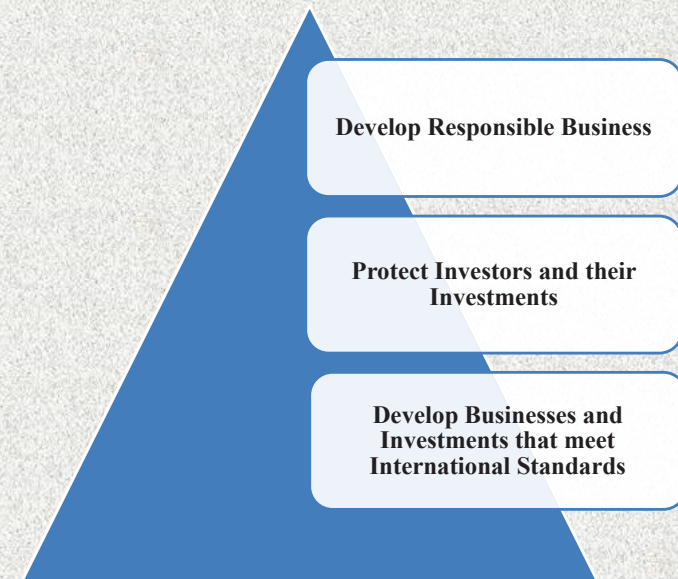
Aung Naing Oo
Director General / Secretary
MIC

Outline

- ❖ Myanmar Investment Law
- ❖ Myanmar Investment Rules
- ❖ Notifications
- ❖ FDI in Myanmar

MYANMAR INVESTMENT LAW

Objectives (Chapter 2)



Role of the Myanmar Investment Commission

Myanmar Investment Commission (MIC)

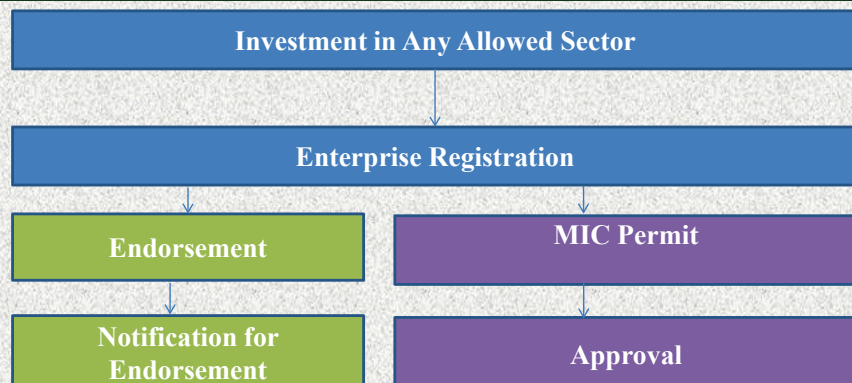
Directorate of Investment and Company Administration (DICA)

- **MIC Mandate and Functions** include: acting as investment promotion agency; investment facilitation; advise on investment policies; reviewing on incentives; responsible business; investment grievance mechanism.
- **Report** periodically to the President and Pyidaungthsu Hluttaw on the progress and issues of investment in the Union.
- **Annual Review** and proposal to eliminate sectors from restricted list;
- **Delegation** of certain functions to Chairman and Members except powers to make Rules;
- **Encourage** Responsible Investment.

Investments Requiring MIC Permit (S. 36)

- (a) Businesses /investment activities that are **strategic** for the Union;
- (b) Large **capital intensive** investment projects;
- (c) Projects which have large potential **impact on the environment and the local community**;
- (d) Businesses/ investment activities which **used state-owned land and building**; and
- (e) Businesses/ investment activities which are **designated by the Government** to require the submission of a proposal to the Commission.

Admission of Investment



Restricted Sectors (Negative List)

Prohibited Sectors (S. 41)

- Hazardous/ poisonous
- Untested technologies unless R&D business
- Damage to environment
- Affect Public Health
- Prohibited under other laws

Restricted (S.42)

- Limited to Government (e.g. power transmission)
- Restricted to Foreign Investors
- JV between foreign and citizen investors
- Notification by MIC (e.g. Notification 26), subject to review if need to liberalise, amend or remove

Special (s.46)

- Significant impact on security, economic condition, the environment and national interest
- Approval from Parliament

Investors' Rights and Protections

National Treatment
(s. 47 (a) and Most Favored Nation Treatment (s. 47(b))

Fair & Equitable Treatment
(s.48)

Rights to Use Land
(s. 50)

Right to Employ Expatriates
(s.51)

Investment Guarantee
(s.52)

Transfer of Funds
(s.56)

Exemptions and Reliefs

Removal of Blanket Incentives

Notifications on Zones/ Investment Activities

Allows for special treatment of domestic SMEs

Investment Guarantee (Ch. 14)

Conditions for an expropriation (S.52):

- for public purposes;
- in a non-discriminatory manner;
- The investors are to be provided with prompt, adequate and effective compensation; and
- In accordance with due process of law.

Direct Expropriation	Indirect Expropriation
<ul style="list-style-type: none"> • Formal transfer of legal title • Outright seizure of the investment of the foreign investors 	<ul style="list-style-type: none"> • A measure or series of measures that has similar effect to direct expropriation even without formal transfer or outright seizure of the legal title over the investment. • This is decided on a case-by-case basis.

Settlement of Disputes (Ch. 19)

GRIEVANCE MECHANISM (S. 82)

MIC to establish and manage a grievance mechanism to inquire and resolve issues before they become legal disputes and to prevent the occurrence of disputes.

Dispute Between Investor and State
(Claims for Breach of the Investment Law)
(To show loss or damage)

Amicable Settlement

Unable to reach a settlement

Domestic Court/ Tribunal in accordance with the law

Other forms if stipulated in an agreement (international arbitration)

MYANMAR INVESTMENT RULES

Chapter II – Types of Investment

1

Businesses / investment activities that are strategic for the State

- ✓ Information, communication, medical, bio or similar technologies, logidtics/energy Infrastructure, urban development, new cities, natural resources, media and etc. (Investment Value Exceeding \$ 20 Million)
- ✓ Cooperation with a Government Organization (Investment Value Exceeding \$ 20 Million)
- ✓ Investment made in a Border region or conflict affected area
- ✓ Investment made across the national border
- ✓ Investment made across the States and Regions
- ✓ Occupying or Using more than 1000 acres of land for agricultural related purposes
- ✓ Occupying or Using more than 100 acres of land for non-agricultural related purposes

Chapter II – Types of Investment (Cont.)

2

Large capital intensive investment projects

- Investment value exceeds USD 100 million

3

Projects which have large potential impact on the environment and the local community

- EIA Type Project/located under a designated protected or reserved area or major biodiversity/Occupying or Using the land that causes social impact

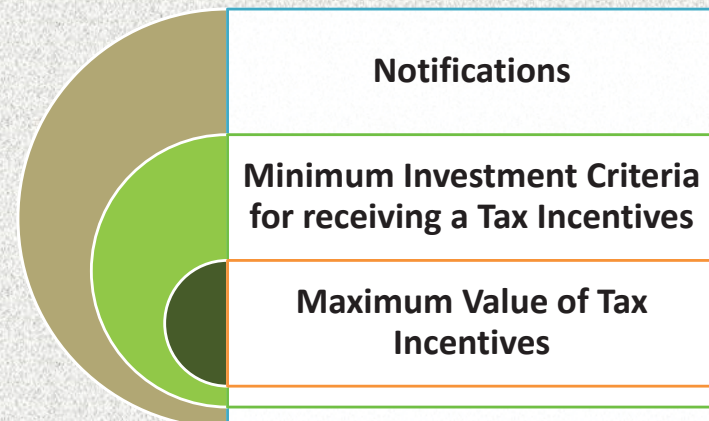
4

Investment activities which used state-owned land and building

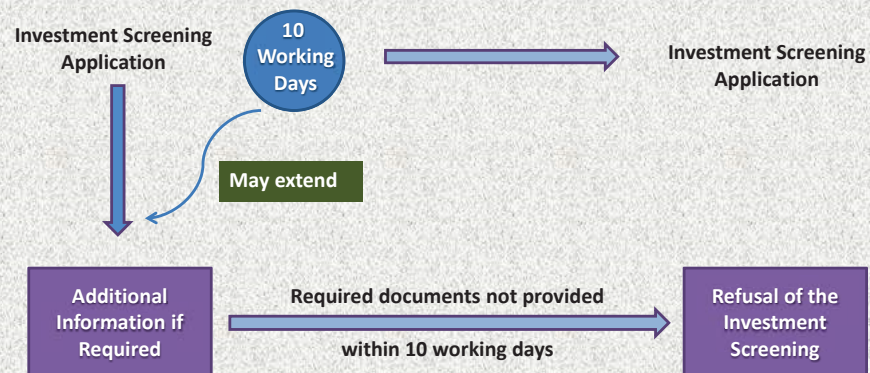
5

Investment activities which are designated by the government to require the submission of a proposal

Chapter III – Promoted Investment Sectors

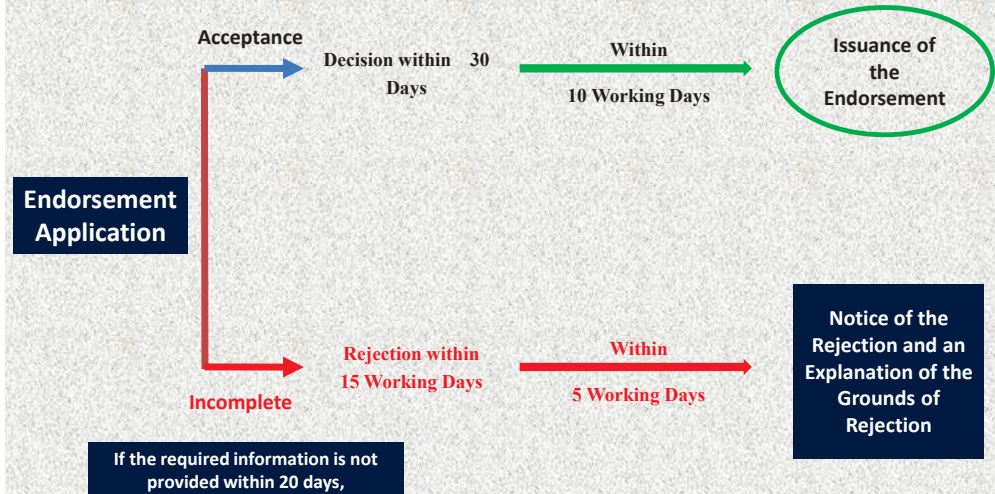


Chapter IV – Investment Screening Applications and Guidance Issuance



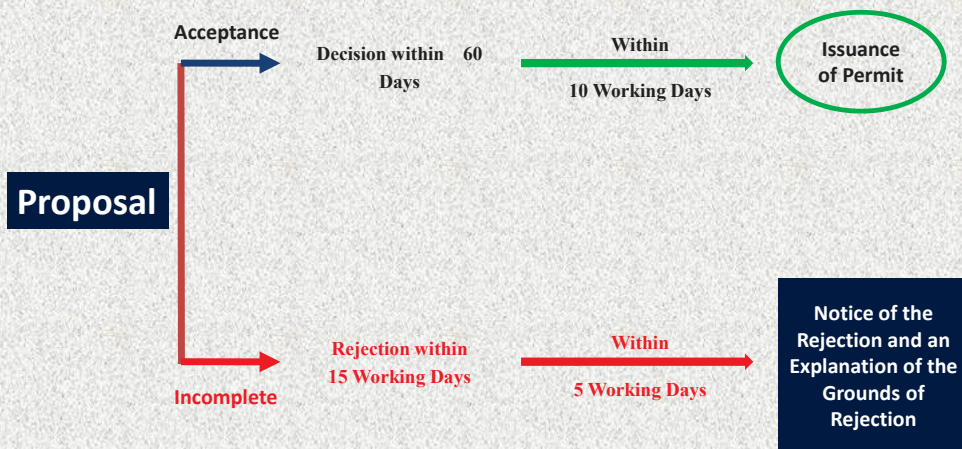
Chapter VII – Endorsement Application and Assessment

Endorsement Application Assessment Procedure



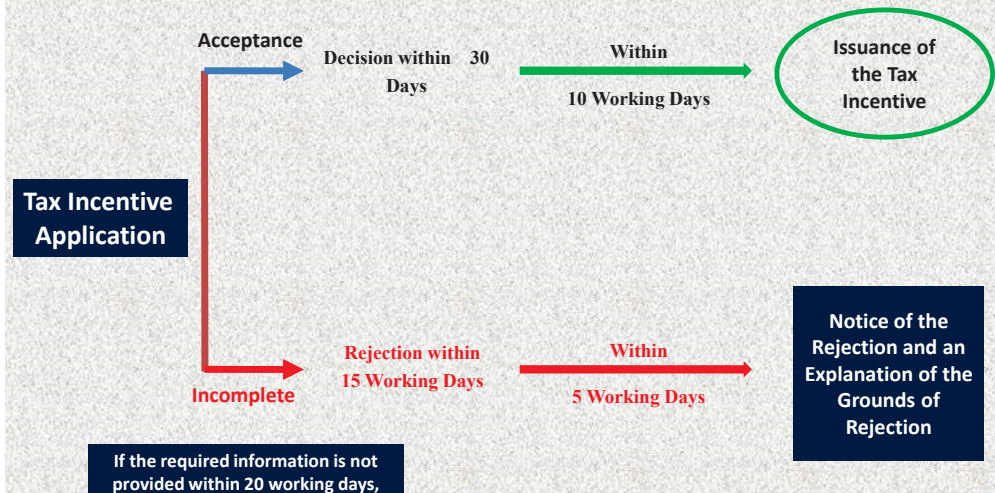
Chapter VI – Proposal Submission and Assessment

Proposal Assessment Procedure



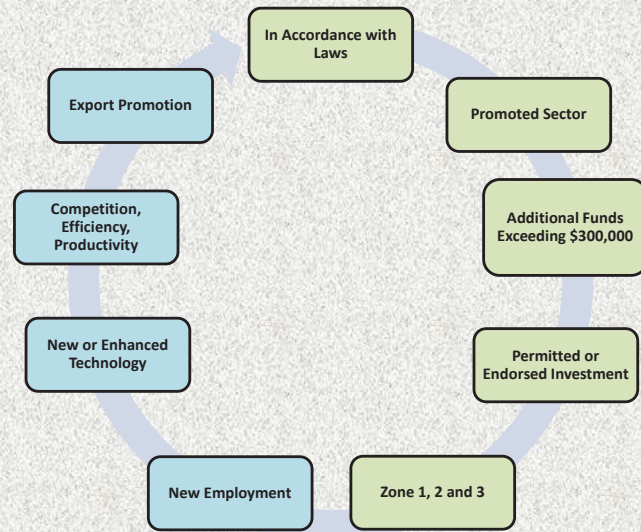
Chapter VIII – Submitting Tax Incentive Applications and Screening

Tax Incentive Application Assessment Procedure



Chapter VIII – Submitting Tax Incentive Applications and Screening

Tax Incentive Assessment Criteria



Designation of Development Zones (Notification No. 10)

Zone 2: Moderate Developed Zone

Total: 122 Townships
in 3 States, 7 Regions and
Nay Pyi Taw Union Territory

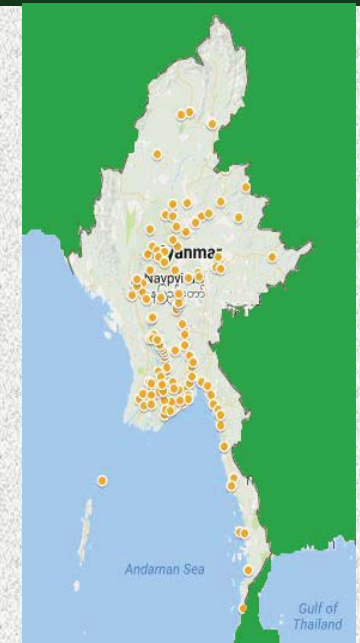
States (26 Townships)

Kachin (4), Mon (8) and Shan (14)

Regions (88 Townships)

Sagaing (3), Tanintharyi (7), Bago (23),
Magwe (12), Mandalay (13),
Yangon (13), Ayeyarwady (17)

Nay Pyi Taw Union Territory
(8 Townships)



Designation of Development Zones (Notification No. 10)

Zone 1: Less Developed Zone

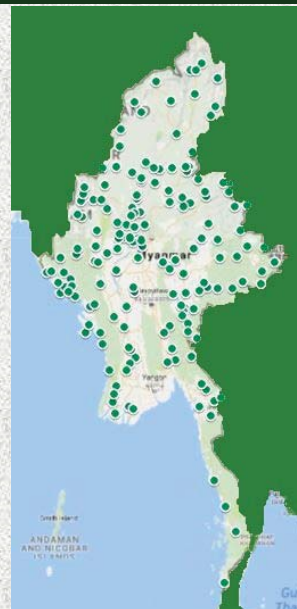
Total: 166 Townships
in 13 States
and Regions
except Yangon and
Nay Pyi Taw Union Territory

States (98 Townships)

Kachin (14), Kayah (7), Kayin (7), Chin (9),
Mon (2), Rakhine (17), Shan (42)

Regions (68 Townships)

Sagaing (34), Tanintharyi (4), Bago (5),
Magwe (13), Mandalay (2), Ayeyarwady (10)



Designation of Development Zones (Notification No. 10)

Zone 3: Developed Regions

Total: 46 Townships
in 2 Regions

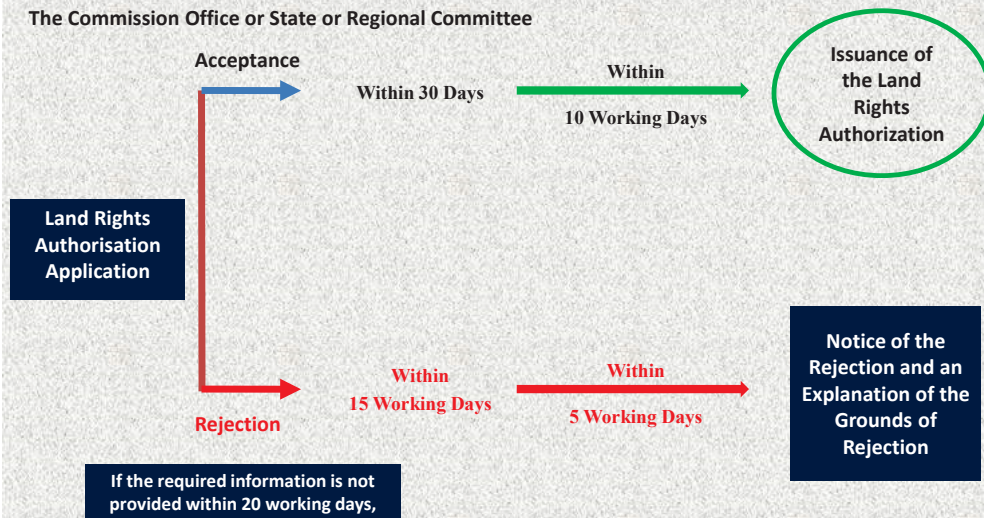
14 townships in Mandalay Region
32 townships in Yangon Region



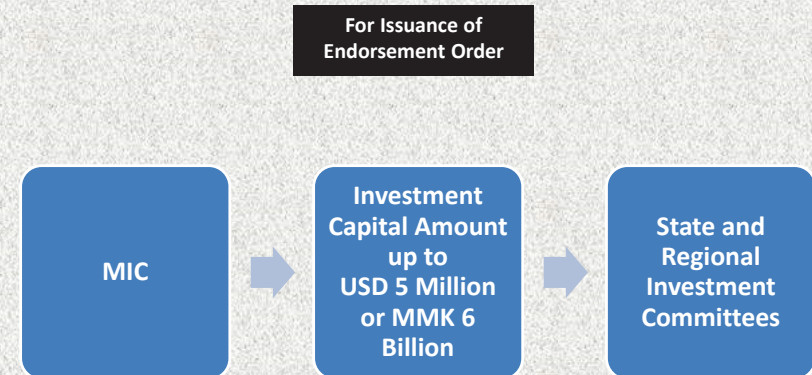
Chapter IX – Land Rights Authorisation Application

Land Rights Authorisation Application Assessment Procedure

The Commission Office or State or Regional Committee



Delegating Power to States and Regions (Notification No. 11)



Chapter XIV – State or Regional Committee

Chairman
(The Chief Minister of the State or Region)

Members
(Qualified Persons from State or Regional Ministries or Other Authorities)

Secretary
(The Head of the State or Regional Committee Office)

Chapter XVI & XVII

Investment Facilitation

➤ One Stop Services



➤ Investment Assistance Committee

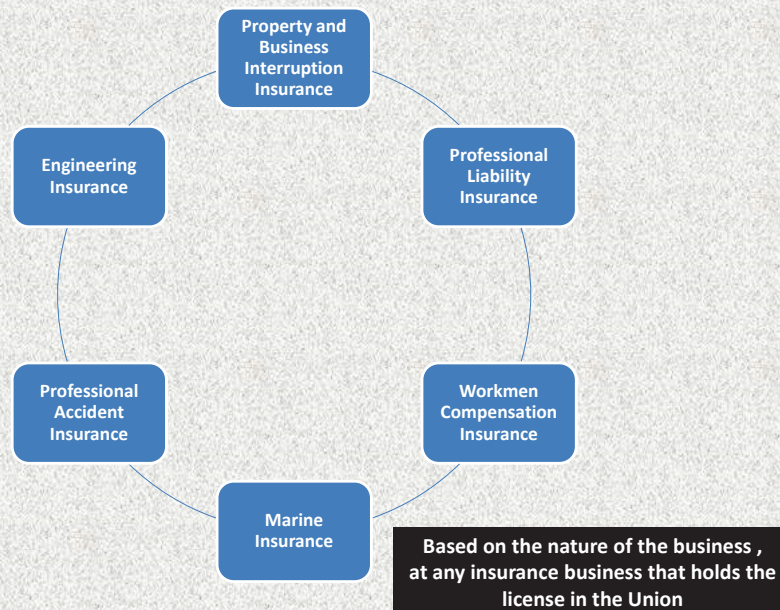
Chapter XX – Investor Responsibilities

- ✓ **Keeping Records**
- ✓ **Submission of EIA/SIA**
(During the course of doing business)
- ✓ **Submission of Annual Report**
(Within 3 months of the end of the Financial Year)
- ✓ **Operating Report (Quarterly)**
- ✓ **Summary of the Report on Website**
(Within 3 days from the date of submission)
- ✓ **Compliance with the Conditions of Permit and Other Applicable Law and etc.**

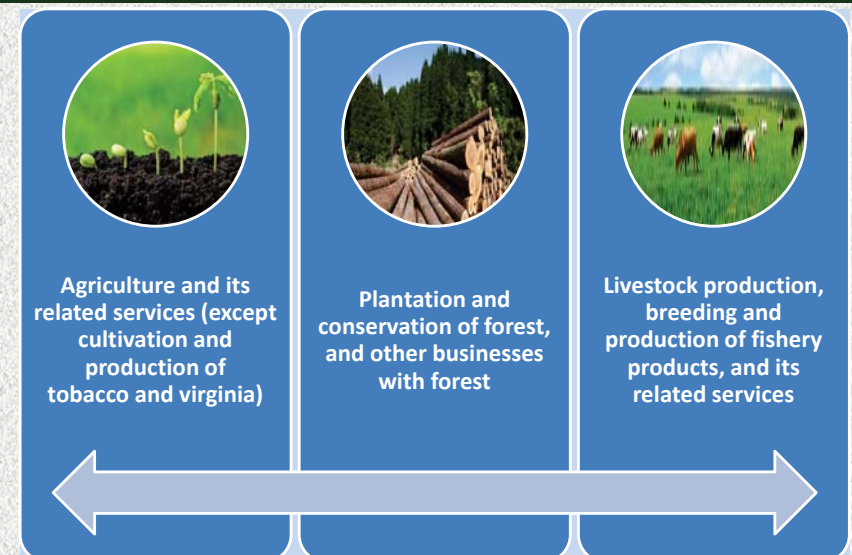
Legal and Policy Reforms



Chapter XXII – Insurance



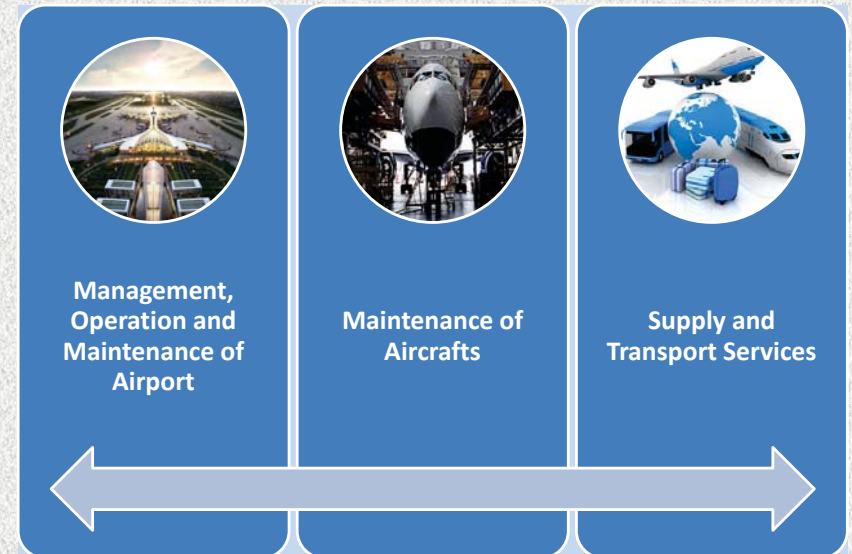
Classification of Promoted Sectors (Notification No. 13)



Classification of Promoted Sectors (Notification No. 13)



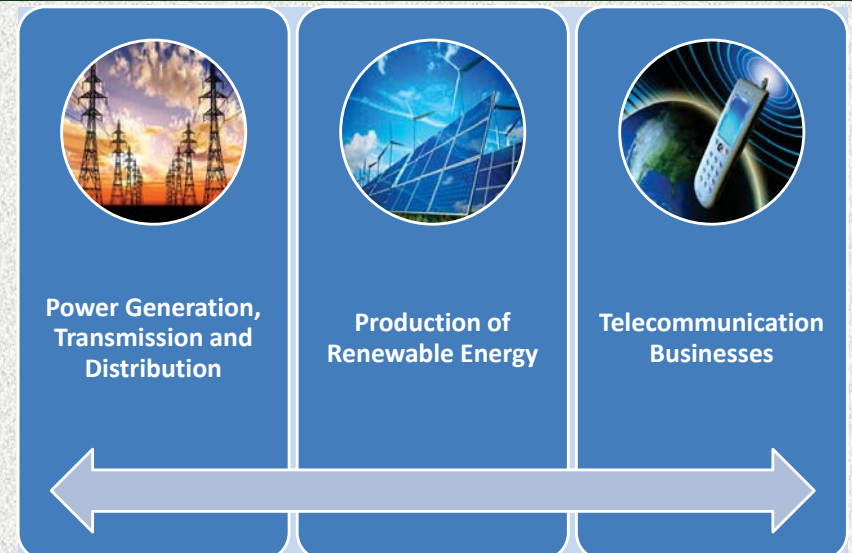
Classification of Promoted Sectors (Notification No. 13)



Classification of Promoted Sectors (Notification No. 13)



Classification of Promoted Sectors (Notification No. 13)



Classification of Promoted Sectors (Notification No. 13)



Classification of Promoted Sectors (Notification No. 13)



List of Restricted Investment Activities (Notification No. 15)

Allowed to be Carried out only by the Union

Security and Defence , Arms and Ammunition, National Postage Stamps, Air Traffic Services, Pilotage Services, Natural Forest and Forest Area, Radioactive Metals, Control of Electric Power System and Inspection of Electrical Business

Not Allowed for Foreign Investors

Publishing and Distribution of Periodicals in Ethnic Languages, Fresh Water Fisheries, Establishment of Quarantine Station for Ex. & Im. of Animals, Pet Care Services, Forest Products, Prospecting, Exploration, Feasibility Study and Production of Mineral for Small and Medium Scale, Tour-guide Service, Mini-market, Convenient Store and etc.

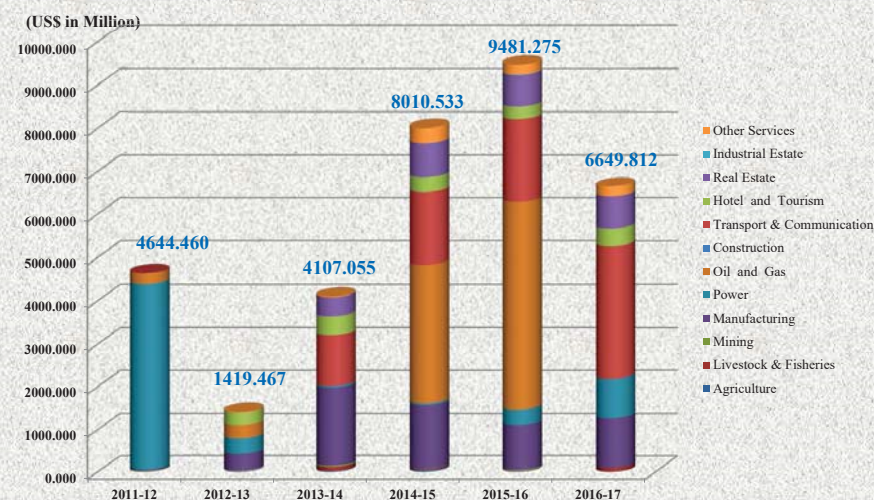
Allowed for JV

Research Activities Related with Fishery, Manufacturing and Domestic Distribution of All Kind of Confectionary including those of Sweet, Cocoa and Chocolate, Development, Sale and Lease of Residential Apartments and Condominiums, Local Tour Services and etc.

to be Carried out with the Approval of the Relevant Ministries

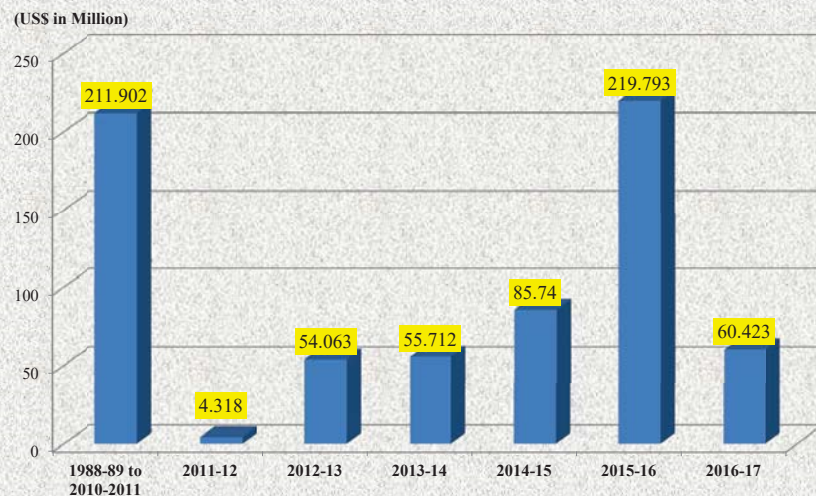
Publishing of Periodical Newspaper in Foreign Languages, Cable TV, Laboratory Services for the Animal Diseases Diagnosis, Aircraft Repair and Maintenance, Wood -based Industries, Private Hospital Services, 100 Acres and Above Urban Development Projects and etc.

Foreign Investment in Myanmar (2011-2012 to 2016-2017)



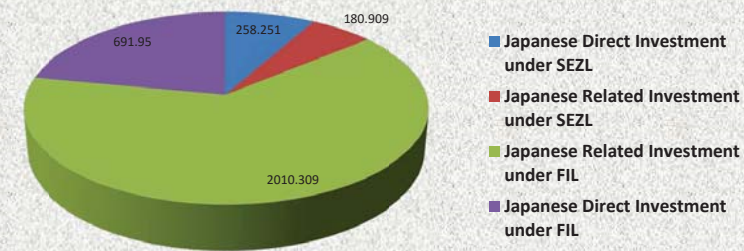
* Investment value is calculated by the MIC permission basis

Japanese Investment in Myanmar (1988-89 to 2016-2017)



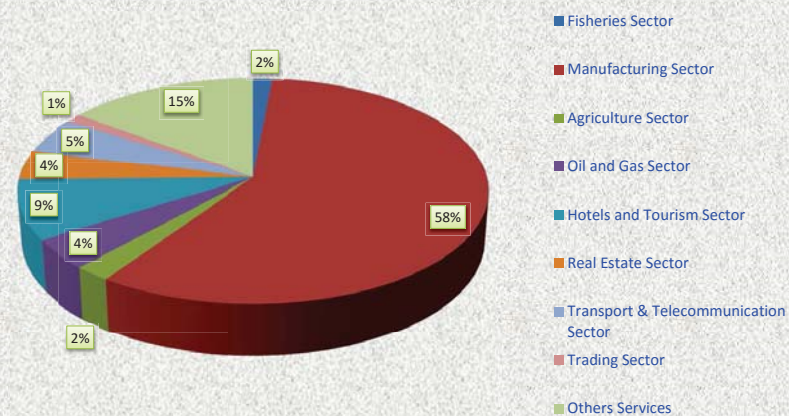
* Investment value is calculated by the MIC permission basis

Accumulated Japanese Related Investment in Myanmar



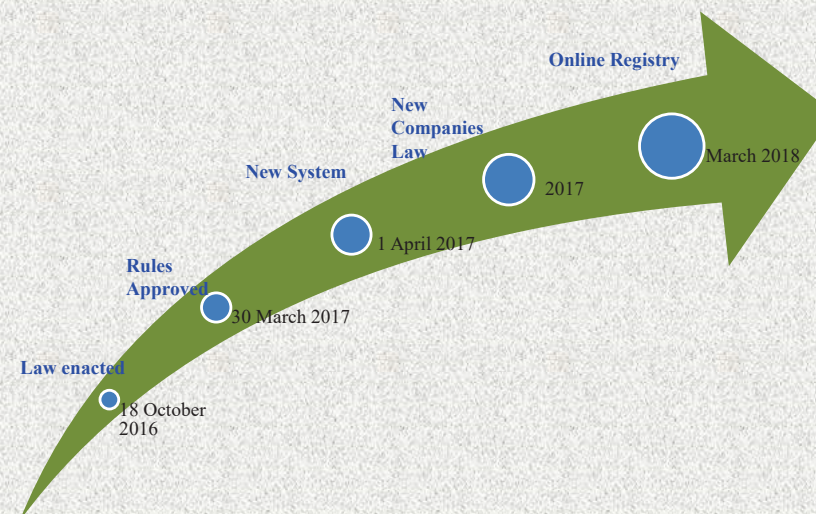
Total Enterprises (206), Total Investment - 3141.419 US\$ Million

Japanese Investment in Myanmar (1988-89 to 2016-2017)



Total Enterprise 112 - Investment - 925.478 US\$ Million

Way Forward



Thank You

Cooperator of Business Community,

Developer of National Economy

DICA

www.dica.gov.mm

majanoo@gmail.com

ティラワ経済特別区



Myanmar Japan Thilawa Development Ltd.

自己紹介

住友商事(株)海外工業団地部に所属:

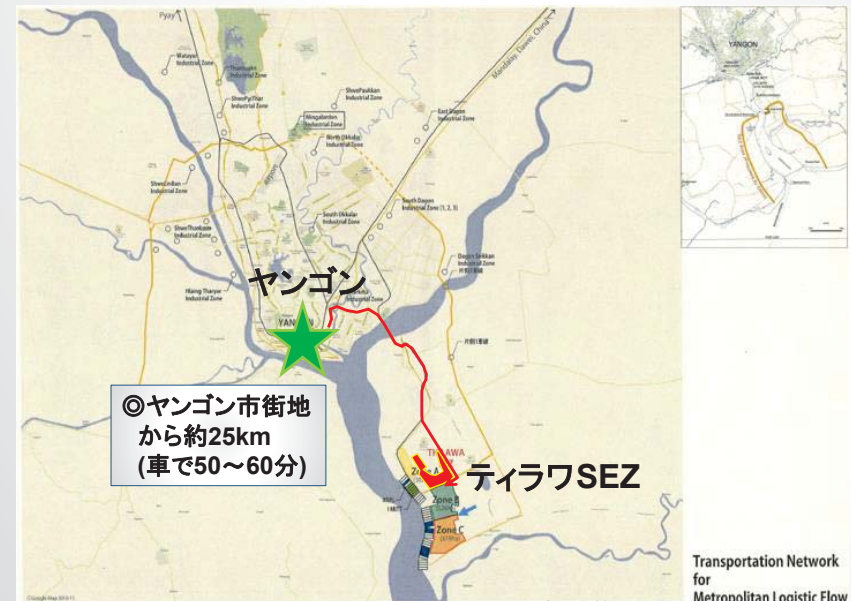
2000～2003年 ベトナム タンロン工業団地に出向

2005～2008年 フィリピン ファーストフィリピン工業団地に出向

2012年 1月～ ティラワ経済特別区のプロジェクトに関わる

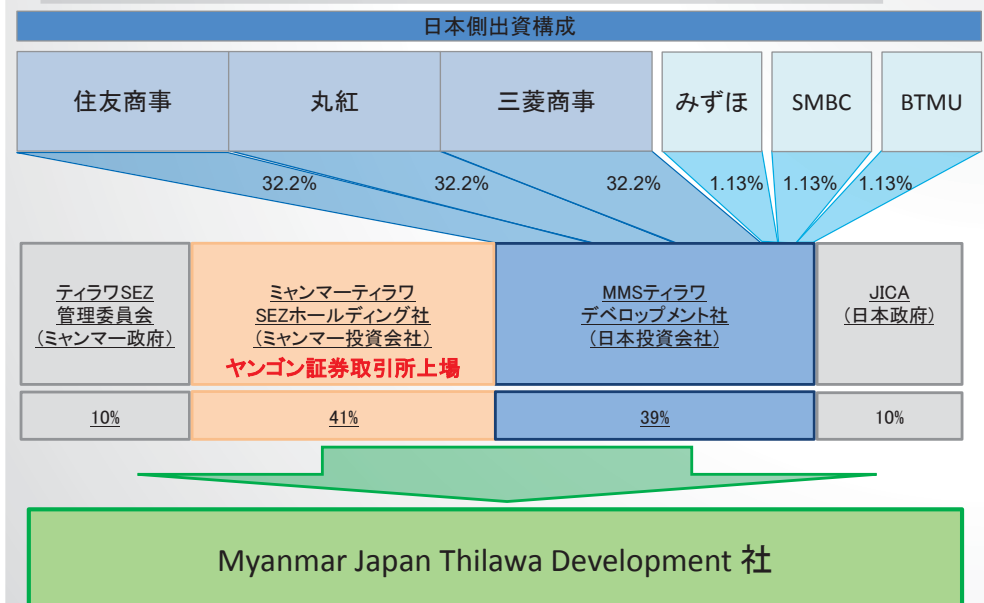
2013年11月～ ヤンゴンに駐在

概要 ティラワSEZロケーション

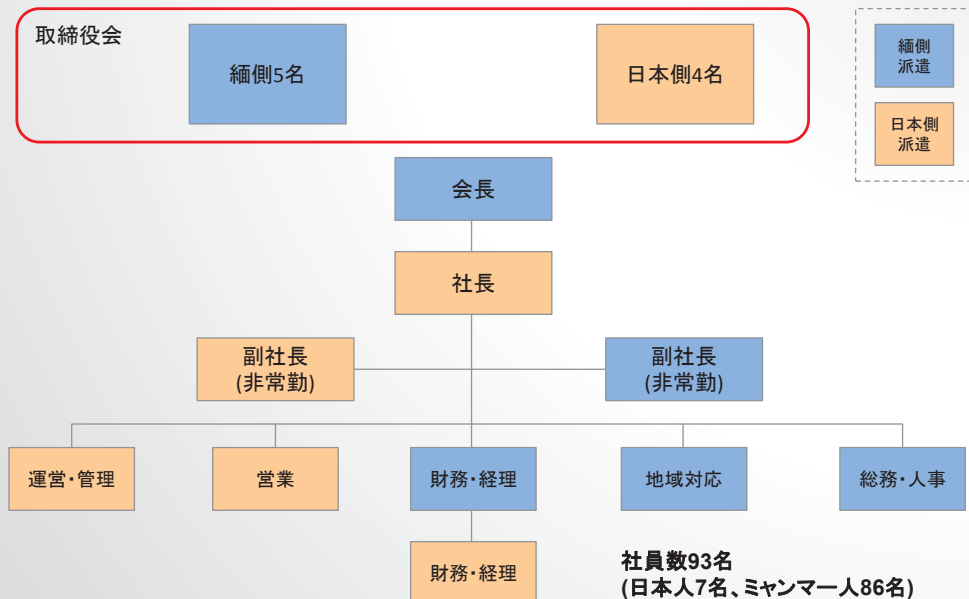


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概要 MJTD出資構成



概要 MJTD組織図



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概要 工事体制 (Zone A)

施工 : 五洋建設株式会社 様

浄水設備 (含む、給水管) : 株式会社クボタ 様

排水処理設備 : 株式会社クボタ 様

配電設備 : 株式会社きんでん 様

インハウスエンジニア : 株式会社日建設計シビル 様

【日本製品の積極活用】

地下埋設電線(矢崎総業)、光ファイバーケーブル(古河電工)、外灯用電線(古河電工)、架空電線(フジクラ)、碍子(NGK)、水道管(クボタ)、ポンプ(川本ポンプ/荏原製作所)、ポンプ用モーター(三菱電機)、CCTV(パナソニック)、道路白線(キクスイライン)

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概要 Zone A



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プロジェクトスケジュール (Zone A)

イベント	2013年	2014年	2015年	2016年
合併契約書調印		★ 2013年10月29日		
起工式		★ 2013年11月30日		
合併会社 (MJTD社) 設立		★ 2014年1月10日		
第一期 着工		★		
第一期 完工			★ 2015年8月	
入居企業操業開始			★ 2015年8月	
開業式			★ 2015年9月	
第二期 着工		★ 2014年10月		
第二期 完工				★ 2016年7月

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2013年10月－合併契約書調印式



2013年11月30日
起工式



2013年11月 開発前のティラワ

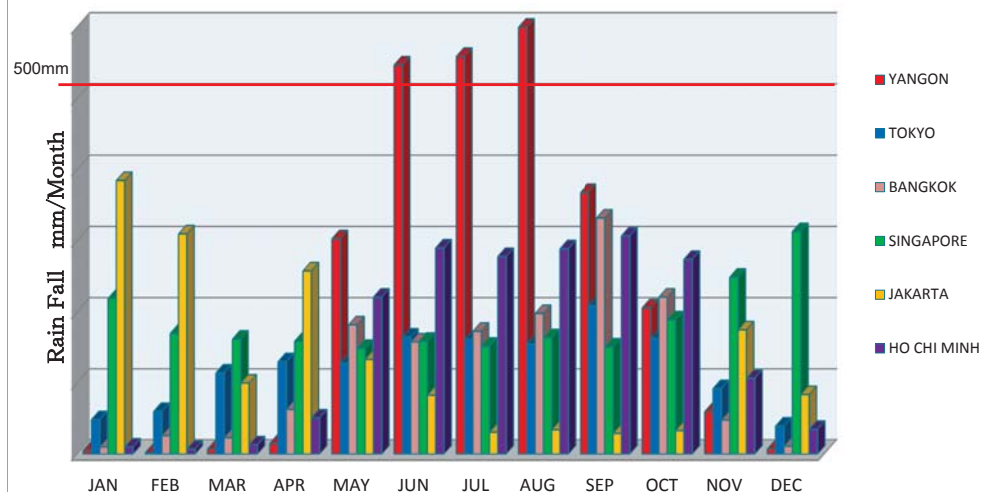


2013年12月1日 着工



各国主要都市降雨量比較

RAIN FALL RECORD ASIA COUNTRIES



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2015年9月 ティラワSEZ 開業式



2015年9月23日 ティラワSEZ開業式典にて

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雨季の状況



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ティラワSEZ構内写真



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ティラワSEZ構内写真



ティラワSEZ構内写真



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ティラワSEZ構内写真



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ティラワSEZ構内写真



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最新の販売状況 (Zone A)

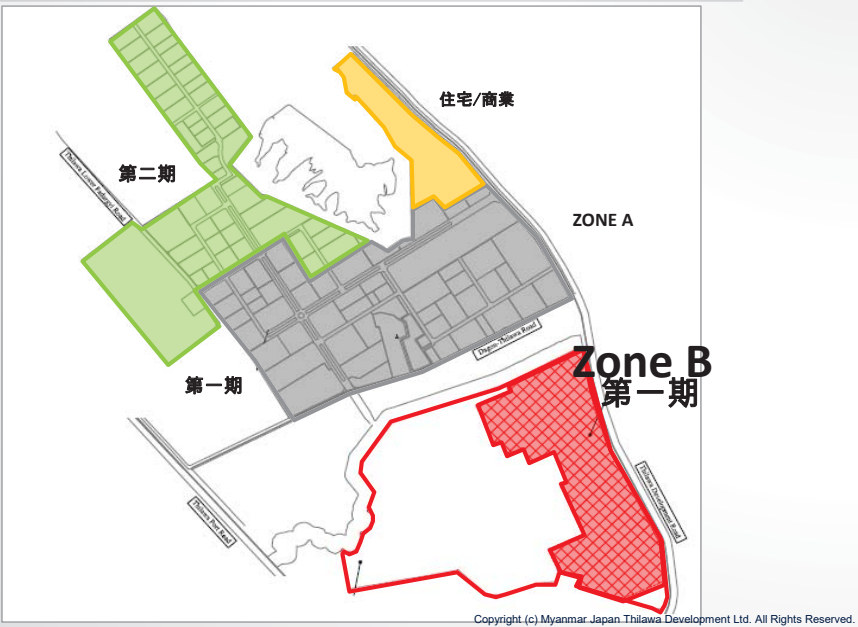


プロジェクトスケジュール (Zone B)

イベント	2017年	2018年	2019年	2020年
第一期 着工	★ 2017年2月7日			
起工式	★ 2017年2月24日			
第一期 完工		★ 2018年半ば完工予定		
一部土地の引き渡し開始		★ 2017年12月		
入居企業操業開始		★ 2018年半ば		

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Zone B 第一期



Zone B 起工式 (2017年2月24日)



最新の販売状況 (Zone B)



Zone B 開発状況



入居企業

国籍別 契約済企業数

日本41社、タイ10社、韓国6社、台湾5社、シンガポール4社、マレーシア3社、ミャンマー3社、香港、中国、インド、ベトナム、アメリカ、スイス、ドイツ、オーストラリア、スウェーデン、オランダ(17ヶ国・地域/82社)

各種統計

形態	社数
国内市場向け企業	49社
輸出企業	24社
物流企業	9社

日系企業会社規模	社数
大企業	25社
中小企業	16社

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ティラワに企業進出が進んでいる理由

1. ミャンマーの魅力
2. SEZ内外のインフラ
3. 簡便な行政手続き
4. 優遇税制

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ティラワに企業進出が進んでいる理由

1. ミャンマーの魅力

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ミャンマーの歴史

近代以前	地域の強国として知られる
1886年	イギリスの植民地に
1943年	日本軍の後押しで一旦独立
1948年	イギリスから独立（直後から内戦始まる）
1950年代	東南アジアで最も経済的にも安定し、民主的な国家
1962年	ウタントが国連総長に就任 ネ・ウィン将軍がクーデター／軍政開始
2011年	民主化（軍政終了／開国）

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ミャンマーに対する評価（現時点）

ー世界銀行による2016年の調査

「事業環境評価 世界170位」

ー進出検討の為に調査に来た企業様の声

「まだまだ市場は小さい。法整備、インフラ整備がまだ不十分」

現時点の評価よりも5年後、10年後に、どうなっているかが重要では？

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2011年時点のミャンマー

- ・ 現地通貨への両替できず
- ・ クレジットカードは使えず
- ・ US\$の国外送金できず
- ・ 携帯電話も普及しておらず
- ・ インターネット殆ど通じず
- ・ まともな徴税システム無し
- ・ アウンサンスーチー女史の名前を言うのも..

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ミャンマーの歴史

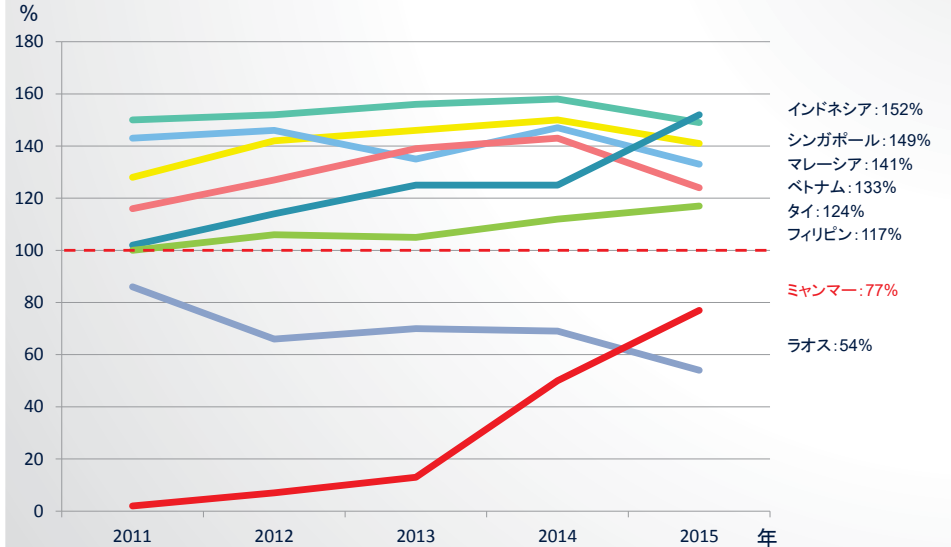
近代以前	地域の強国として知られる
1886年	イギリスの植民地に
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1948年	イギリスから独立（直後から内戦始まる）
1950年代	東南アジアで最も経済的にも安定し、民主的な国家
1962年	ウタントが国連総長に就任 ネ・ウィン将軍がクーデター／軍政開始
2011年	民主化（軍政終了／開国）
2015年	総選挙（NLD圧勝） 和平交渉進展
2016年	NLD政権発足（本格的な民主主義が確立） 米国による制裁の全面解除

⇒国家統一、民主主義、国際社会への復帰を果たしたばかりの国

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これから発展する国 ミャンマー

携帯電話普及率比較データ 2015年まで



*Trading Economics web page、グローバルノート 国際統計専門サイト web pageよりMJTD社が作成。

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2017年時点のミャンマー

- ・ 現地通貨への両替は容易に可能
- ・ クレジットカードが使える所が増加
- ・ US\$の国外送金は何ら問題無し。
- ・ 携帯電話も幅広く普及

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2017年時点のミャンマー

- ・ 現地通貨への両替は容易に可能
- ・ クレジットカードは使える所が増加
- ・ US\$の国外送金は何ら問題無し
- ・ 携帯電話も幅広く普及
- ・ インターネットも問題なく利用可能
- ・ まともな徴税システムが機能し出した所
- ・ アウンサンスーチー女史が選挙の結果、国のリーダーに

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NLD政権

- NLDによる政権運営

- + NLDは連邦議会の約58%を占める
- + 国軍との協力関係を維持

→安定した政権運営

- 国際社会の反応

- + 欧米からの引き合いが増加
- + 国際社会からの援助が増加

(アジア開発銀行 融資承認額 2014年 0.6億ドル→2016年 3.5億ドル)
(世界銀行 融資承認額 2014年 2.8億ドル→2016年 4.0億ドル)

→米国による制裁全面解除(2016年10月)により、更に加速へ。

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NLD政権の経済基本政策

- アウンサンスーチー国家顧問兼外相、大統領府相の発言

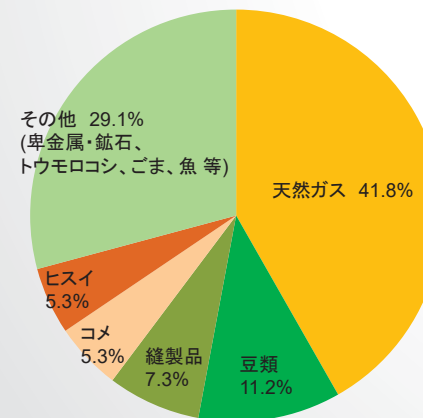
- ✓ 経済発展が必要
- ✓ 法の支配の実現を目指す
- ✓ 外国資本を積極的に誘致する
- ✓ ティラワをモデルとした開発を進める必要が有る

「国家の統一」「民主主義」の維持に必要な「経済発展」、
そして「経済発展」に必要な「外資誘致」。

様々な課題あるが、**改善意欲は強い。**

ミャンマーの潜在力～豊かな天然資源

品目別輸出割合(2015年度)



ミャンマーの主な資源

【鉱産資源】

天然ガス、石油、石炭、金、銀、銅、鉛、亜鉛、タングステン、ルビー、サファイア、ヒスイ

【農林水産資源】

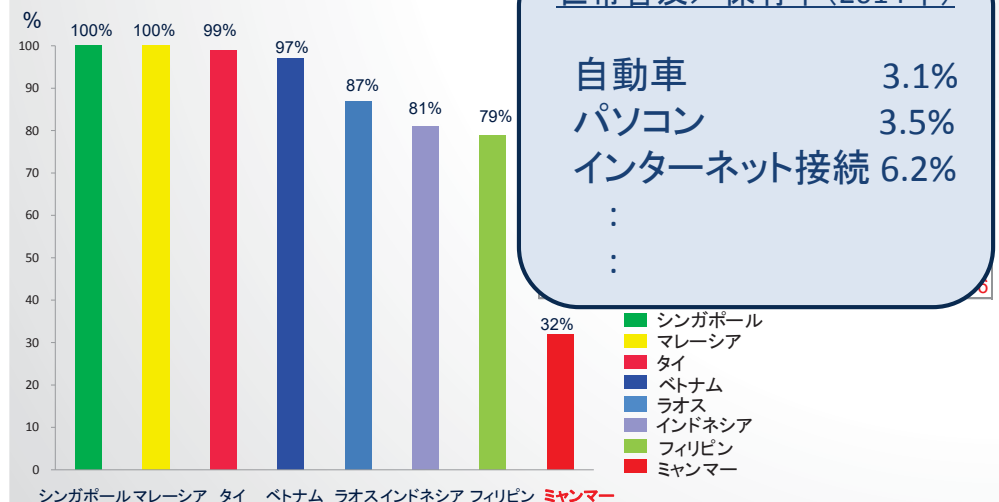
米、豆、ごま、チーク材、魚類、真珠等

出典: JETRO資料「ミャンマー経済と日本企業の投資動向」よりMJTD社が作成

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これから発展する国 ミャンマー

東南アジア各国電化率比較データ、グラフ (2014年)



* International Energy Agencyのデータを元にMJTD社が作成

親日国ミャンマー

1. 親日的なミャンマー政府

1943年 日本政府・軍の後押しで一旦独立

1981年 ミャンマー政府が、旧日本陸軍関係者7名に、国家最高の栄誉「アウンサン・ダゴン勲章」を授与。

2014年 国軍司令長官が訪日した際に、旧日本陸軍関係者の墓参りに。

2. 日本製品への信頼

(1)あふれる日本製の自動車

(2)目につく日本製の家電製品

3. 日本への信頼

(1)通信事業への日本企業の参入

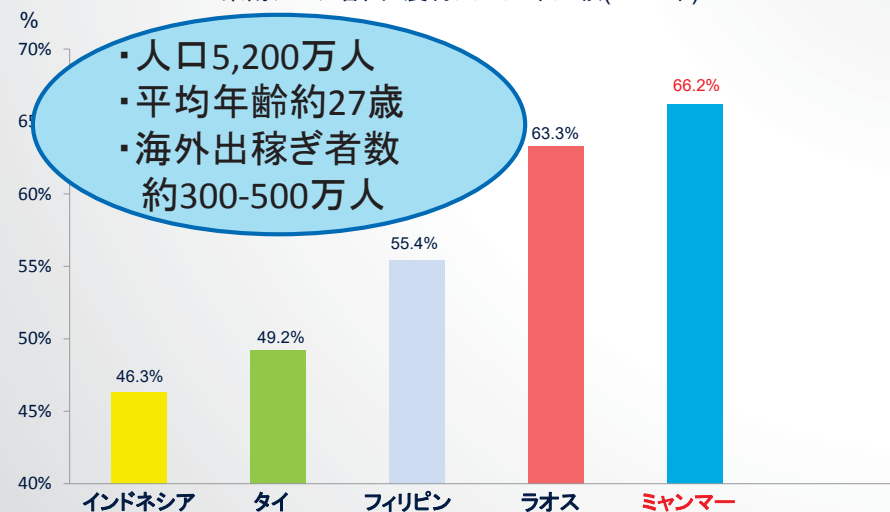
(2)銀行ライセンスの付与

(3)保険ライセンスの開放



農村人口比率 比較

東南アジア各国 農村人口比率比較(2015年)

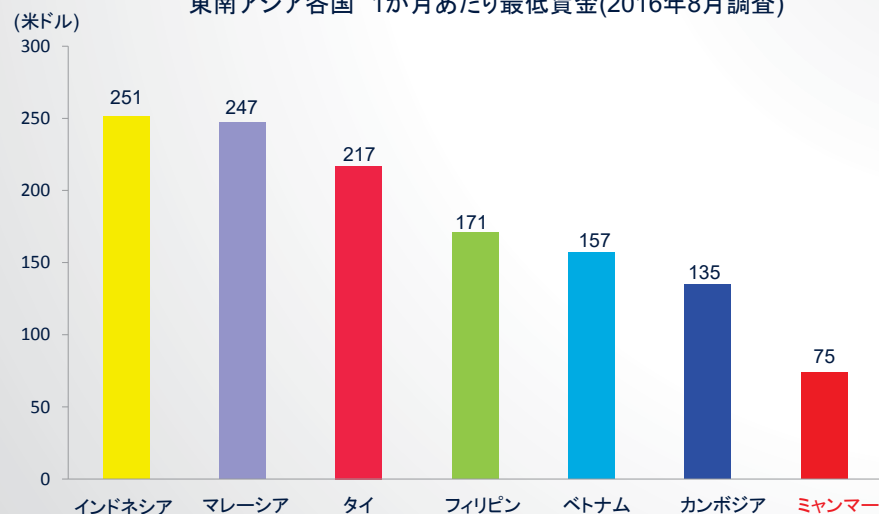


*国際連合食糧農業機関データベースを元にMJTD社が作成
*各国とも、人口は2015年12月時点のデータを使用。

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最低賃金 比較

東南アジア各国 1か月あたり最低賃金(2016年8月調査)



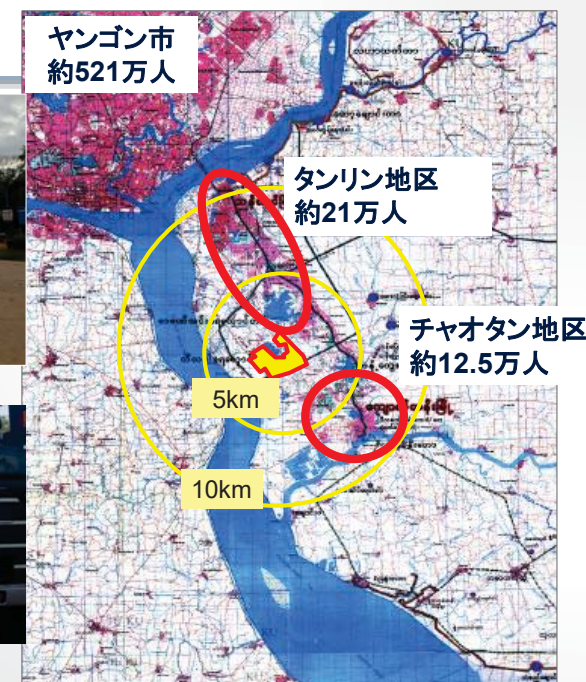
出典: Trading Economics web pageデータベース、Wage Indicator web pageデータベース、Department of Labor and Employment(Philippine)データベースを基にMJTD社が作成(2016年8月時点で取得可能な情報を基に算出)。
*ドル換算には、2016年8月調査時点の為替レートを使用。

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周辺人口



朝ヤンゴン市内に向かうバスの列



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周辺の大学



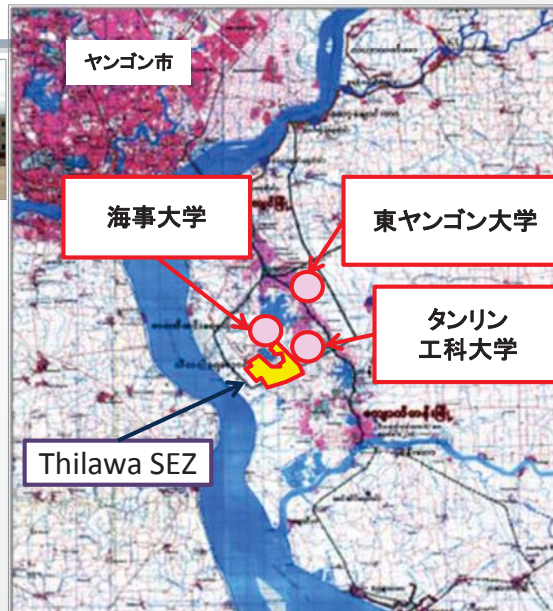
【周辺大学の生徒数】

タンリン
工科大学 約2,900名

東ヤンゴン大学 約8,300名

海事大学 約400名

上記3大学から
年間3,000-4,000名の卒業生



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ティラワに企業進出が進んでいる理由

1. ミャンマーの魅力

2. SEZ内外のインフラ

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ミャンマーの人々

- 某大手日系電機メーカーの方: (ミャンマー国内の工場を幾つか見学した後で)
「手の動きは悪くない。他の東南アジア諸国と比較しても全く遜色ない。」
- ミャンマーに工場を持つ某日系縫製メーカーの方:
「教育に時間が必要だが、自社の中国工場のワーカーよりも寧ろ良い。」
- 弊社スタッフ:
「未だ会社に貢献できていないので残業代は要りません。」
- 弊社関係者:
「入国審査で誤って他の方に渡されたパスポートをわざわざホテルまで届けてくれて謝罪してくれた。」
- 日本人会某運動部関係者
「汚れたビブスをタクシーのトランクに忘れて降りたら、数日後に洗濯した状態で畳んで届けてくれた。」
- 在ヤンゴンの多くの日本人:
「ミャンマーは未だ何も無いけれども、ミャンマー人だけは本当に良い。」

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インフラ ティラワSEZ周辺



ヤンゴン市内には
日本料理屋100軒以上

タンリン工科大学



スターシティ



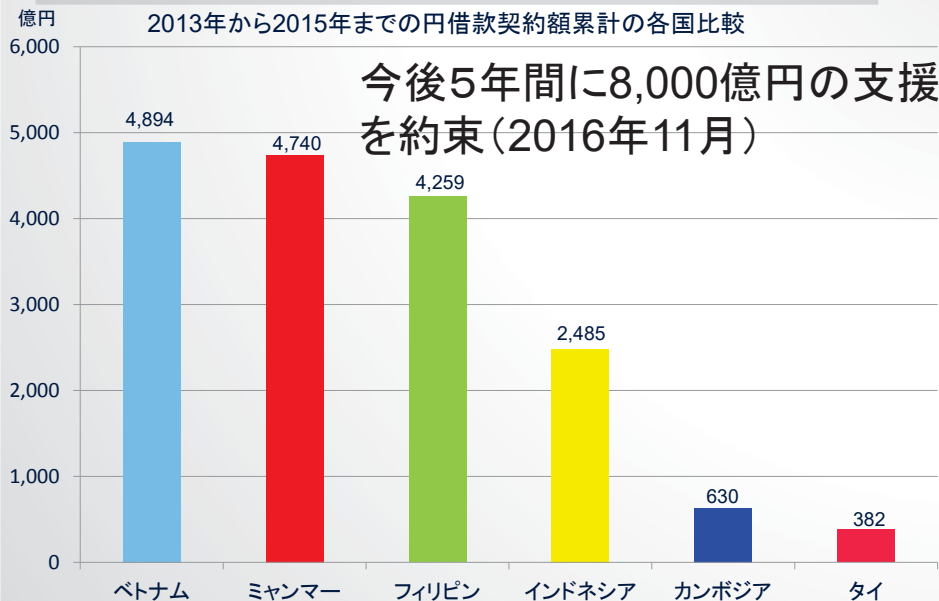
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日本政府の関わり

- 2011年11月 日緬首脳会談(於:パリ)にてミャンマーから日本にティラワ開発への協力要請
- 2012年 4月 日緬首脳会談(於:東京)にてティラワ開発のマスタープラン策定に関する覚書を締結
- 12月 ティラワ開発に関する協力覚書を締結。政府間調整委員会を開催
- 2013年 1月 麻生副総理訪緬。2015年開業に向けた開発協力を大統領と確認
- 5月 安倍総理訪緬。日緬民間投資会社間で開発に係る協力覚書を締結
ティラワ周辺インフラ(電力、港湾)の整備に対する約200億円の円借款供与を決定
- 10月 麻生副総理兼財務大臣、茂木経済産業大臣、ウィン・シェイン財務大臣立会いの下、日緬出資者間で合弁契約書を署名
- 2015年 9月 麻生副総理兼財務大臣、ニャントウン副大統領にご出席頂き、開所式を挙

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ミャンマーの円借款の状況(過去3年間)



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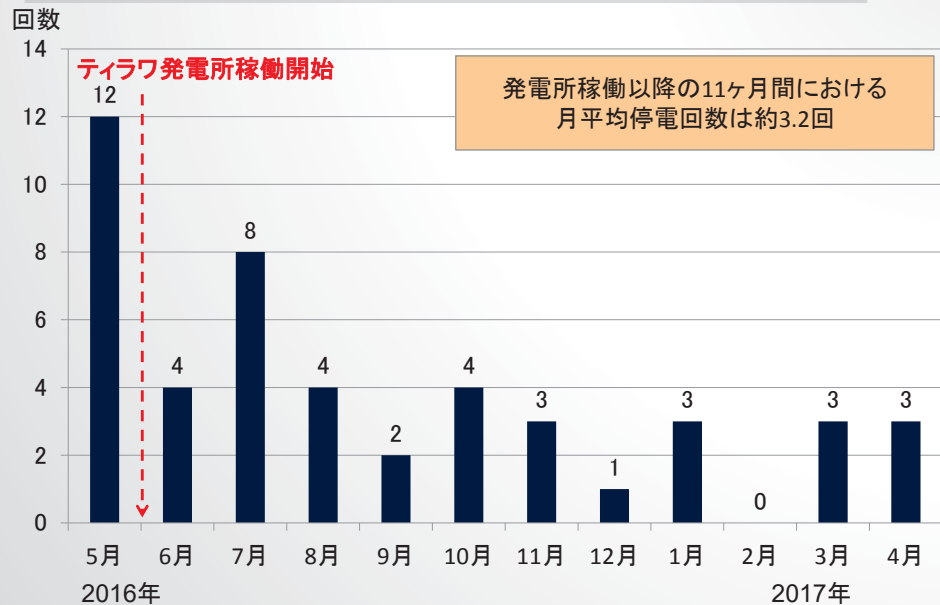
インフラ ティラワSEZ周辺



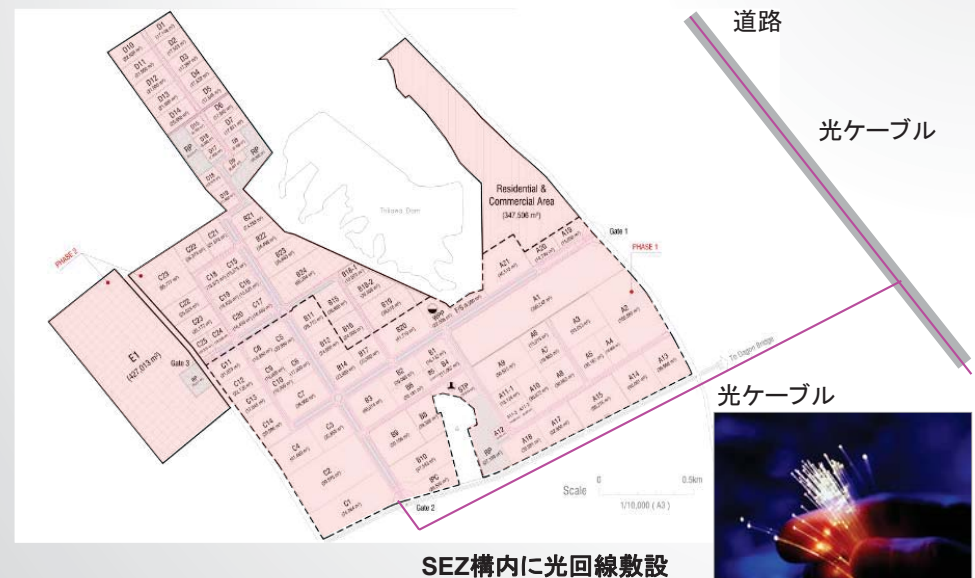
インフラ 電力供給



外部要因による事故停電



インフラ 通信



インフラ 上下水道



インフラ 産業廃棄物処理場



インフラ 産業廃棄物処理場



インフラ 職業訓練校



インフラ ティラワ税関



ティラワSEZ内に税関常駐

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レンタル工場

- ・ 1ユニット当り 約1,500㎡



レンタル工場(内部)



500~750㎡の小規模レンタルも対応可能。

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ワーカー用住宅

床面積: 53,820㎡
棟数: 15棟(3棟竣工済)
収容人数: 5,850人



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Zone A 住宅・商業地域



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地盤強度

地盤強度 (十分な強度 深さ1.5m / N値14~21)



地盤の種類と状態		N値
礫層	密実なもの	50以上
	密実でないもの	30以上
砂質地盤	密なもの	30~50
	中位	10~30
	緩い	5~10
	非常に緩い	5以下
粘土質層	非常に硬い	15~30
	硬い	8~15
	中位	4~8
	軟らかい	2~4
	非常に軟らかい	2以下

参考: 住宅地の地盤と重要事項説明
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ティラワに企業進出が進んでいる理由

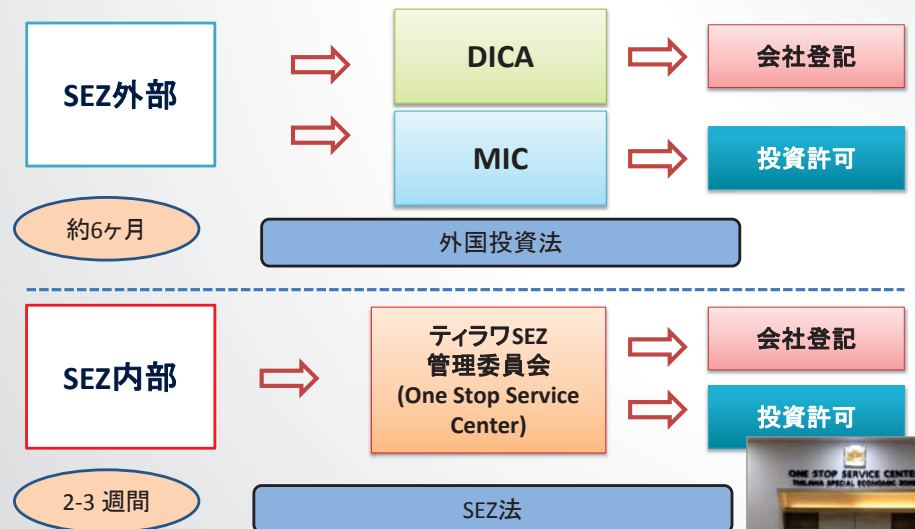
1. ミャンマーの魅力

2. SEZ内外のインフラ

3. 簡便な行政手続き

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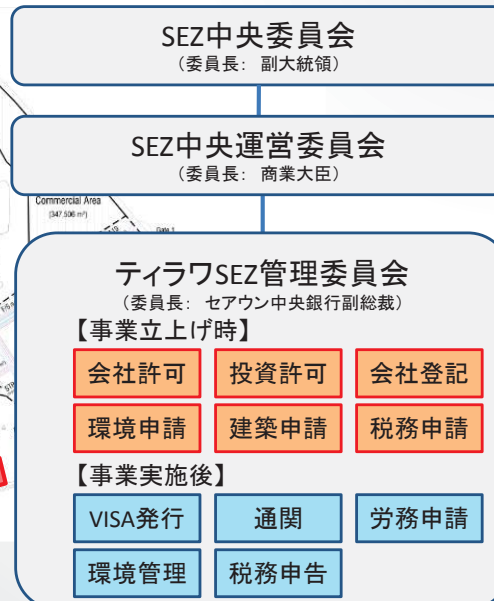
「規制緩和特区」ー投資許可手続き



* 制度設計、手続き取り進めに当たってJICA様による支援有り

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ワンストップサービスセンター



JICA様より専門家派遣

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ティラワに企業進出が進んでいる理由

1. ミャンマーの魅力

2. SEZ内外のインフラ

3. 簡便な行政手続き

4. 優遇税制

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優遇税制(輸出企業の場合)



国名	ミャンマー	ベトナム	タイ	インドネシア	フィリピン
工業団地	Thilawa SEZ	TLIP	Amata Nakorn	EJIP	FPIP
企業形態	SEZ内 Free Zone 企業	EPE企業	BOI企業	EPTE(KB)企業	PEZA企業
法人税	基本税率	22%	20%	25%	総所得の5%
	タックスホリデー	無し	3年間免除	無し	4~8年間免除
配当送金課税		0%	10%	10%	10%
輸入関税	設備	免税	税率10%以上に限り50%減税	免税	免税
	原材料	免税	1年間免税	免税	免税

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職業訓練

- ✓ SEZ近隣住民向け職業訓練をフジワーク様と共同で実施。基礎ビジネス講座や実務研修を開講。

講師陣と受講生の様子



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MJTDの取組み 周辺地域への貢献活動計画

1. 寺院への寄進 (集会所の建設)
2. 近隣在住学生への奨学金制度
3. 近隣在住学生への文房具の寄付
4. 近隣の村のインフラ整備
5. 職業訓練プログラムの提供
6. 洪水被災者への義捐金の供出
7. 就職の斡旋

寄贈の集会所



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地域貢献活動 (寄付活動／奨学金提供)

毎年周辺の児童生徒約300名に文房具を寄付し、11名に奨学金を提供。



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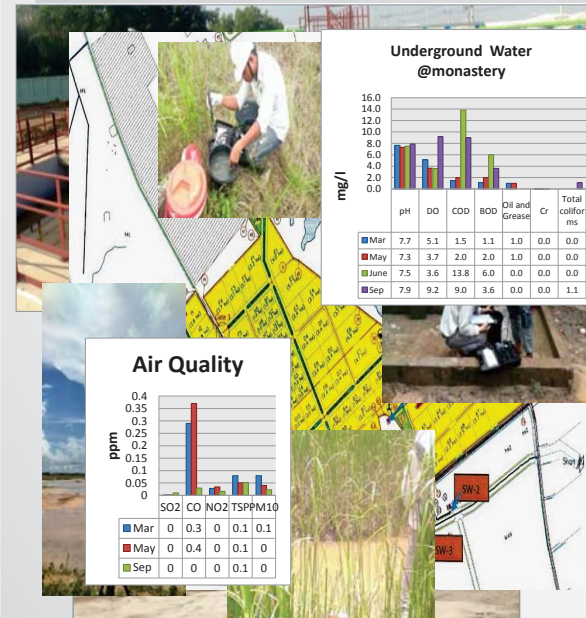
地域貢献活動 (健康促進学習)

毎年地元の小学校で健康促進学習を実施。



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環境対策



下水処理場
固形産業廃棄物処理場

国際基準に則った独自の
環境基準

定期的な大気、水質
検査

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シュエダゴンパゴダへの遠足



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SEZ内の木の本数



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MJTDの取り組み (SEZ管理委員会との対話)

ティラワSEZ管理委員会と入居企業様との直接対話



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ご清聴有難うございました

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ティラワSEZ 汚職撲滅宣言

2014年11月12日 汚職撲滅に向けて宣言書を採択

本文

ティラワSEZ管理委員会

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