



MYANMAR-LUXEMBOURG



DEVELOPMENT COOPERATION

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



ACKNOWLEDGEMENTS

This Tourism Human Resource Strategy and Action Plan (HRDSAP) is the product of a collaboration between Myanmar's Ministry of Hotels and Tourism and LuxDev, Luxembourg Development Cooperation Agency, Project MYA/001 "Development of Human Resources in the Hotel and Tourism Sector and Capacity Development of the Ministry of Hotels and Tourism". Significant contributions to the document were provided, especially through the HRDSAP Working Group, by a range of officials from the Ministry of Hotels and Tourism, the Myanmar Tourism Federation, representatives from other government ministries and departments, civil society organisations and Myanmar's development partners.

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The support of the following organizations is also acknowledged:

Myanmar Tourism Federation & Member Associations

International Labour Organization

BIF | HamsaHub

MYANMAR TOURISM HUMAN RESOURCE STRATEGY & ACTION PLAN

Myanmar Ministry of Hotels and Tourism (MOHT),

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Figure 1: International Visitor Arrivals States and Regions (2011, 2013 and 2015)

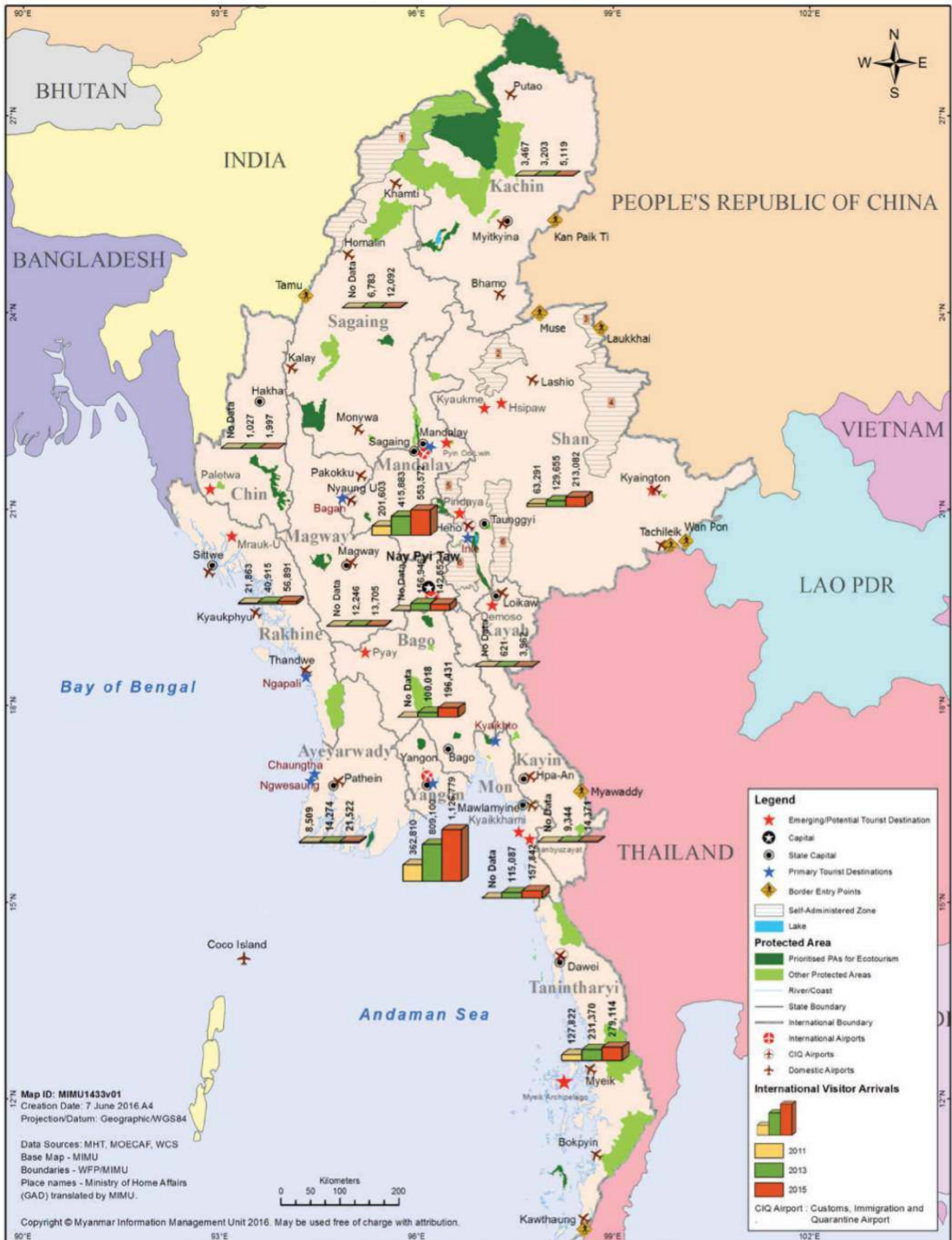
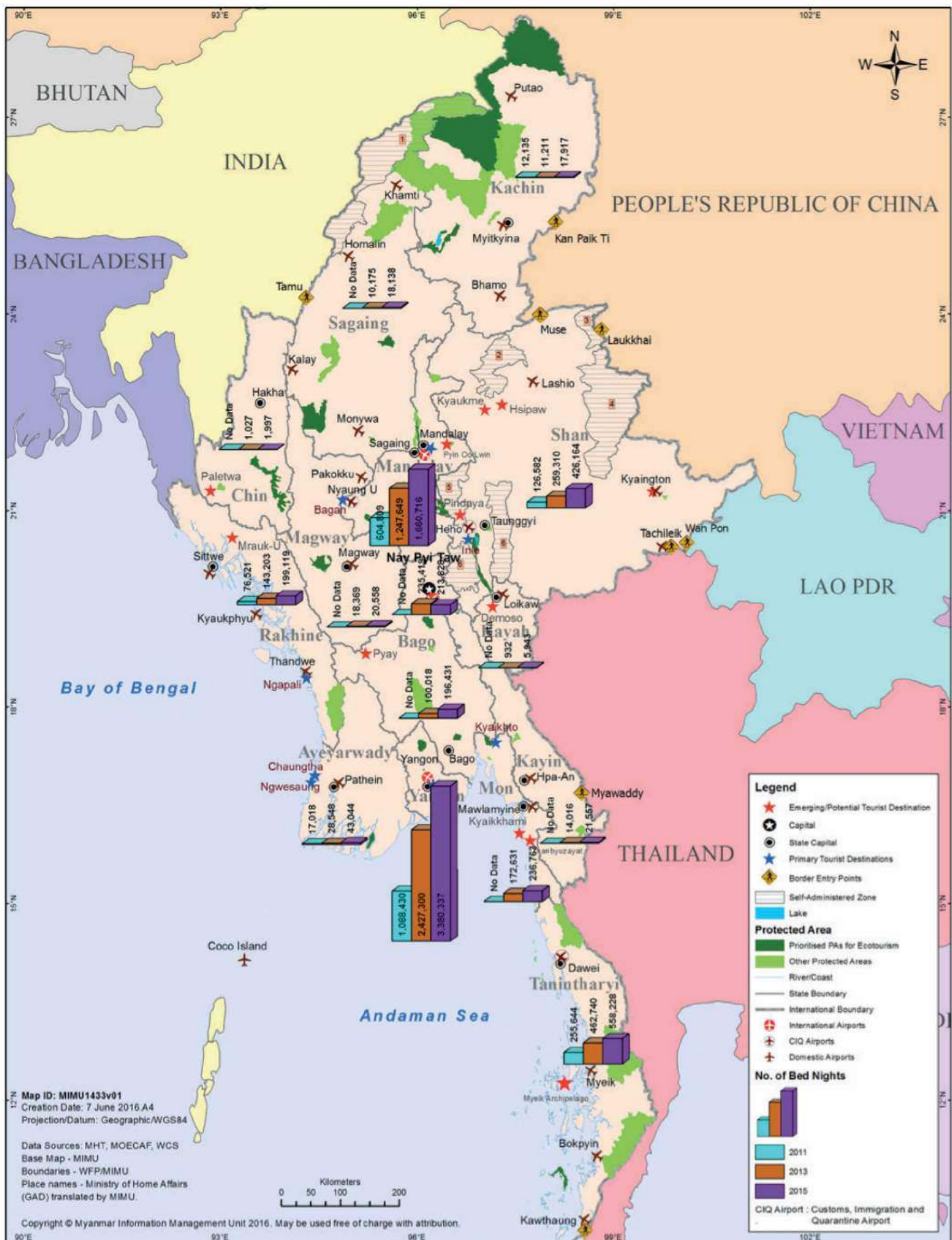


Figure 2: Number of Bed Nights for International Visitor Arrivals States and Regions (2011, 2013 and 2015)



FOREWORD

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

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

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

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

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

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

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

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

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

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

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

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

Mr. Claude Jentgen

Chargé d'affaires a.i.,

Head of Development Cooperation Office in Vientiane, Laos

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Luxembourg

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EXECUTIVE SUMMARY

Tourism, as one of Myanmar's key economic pillars supporting reform processes, job creation and expansion of the wider economy, is out-performing other industry sectors. As a diverse and labour-intensive activity, tourism provides significant potential to reduce poverty. Direct employment in the sector is expected to provide roughly 1.5 million jobs by 2020, with a total of over two-million new jobs including those created through sector supply chains. By 2030 Myanmar will likely be receiving upwards of 12 million international visitors per year, with the sector providing direct employment for over two million people and a total employment figure of around four million jobs.

How and where tourism employment is created depends largely upon the commitments and actions of tourism-related planners, including government policy-makers and technicians, as well as industry entrepreneurs especially in the accommodation, transport and tour operations sub-sectors. It is in this context that the MOHT has formulated a Tourism Human Resource Development Strategy and Action Plan (HRDSAP), which can be read as a preliminary work-plan for the creation of four million jobs.

The Strategy's formulation is based upon 10 research strands that assessed tourism human resource (HR) management and development issues across the public and private sectors. The strands cover a range of tourism businesses and employment spheres including hotels, restaurants, tour operations, tourist guides and handicrafts. Research also reviewed matters relating to tourism education and training providers, and sector associations as well as women and ethnic nationalities involvement with the sector.

With tourism growing rapidly, a whole-of-government approach to sector planning is required at the centre, state / regional, as well as district and township levels, where tourism activity is a growing phenomenon with both positive and negative impacts. To minimise negative impacts and maximise benefits, a range of HR development activities must be made available to government staff to support responsible tourism policy, planning and management processes.

From a tourism and hospitality education and training perspective, work is needed to increase access to learning opportunities and ensure provision meets quality standards. The Union Government of Myanmar (GOM) is working to ensure tourism education and training aligns with the Common Association of South-East Asian Nations (ASEAN) Tourism Curriculum, and that industry employment practices develop in tandem with the ASEAN Mutual Recognition Agreement on Tourism Professionals (MRA-TP).

Myanmar's vision for tourism human resource development is "to promote a gracious and dignified service-oriented culture". GOM recognises that as a people-oriented industry, quality tourism is about the attitude, skill sets and personal attributes of owners, managers and staff at all business levels, and across the public and private sectors. Countries as well as businesses that excel in tourism, and that achieve the highest levels of visitor-spend and repeat business, are those recognised for quality standards of service.

To achieve this vision, the HRDSAP sets out three strategic programmes with 21 key objectives and 50 sets of actions that cover public sector issues, tourism education and training, and the tourism private sector. Key objectives for each strategic programme are as follows.

Strategic Programme 1: Tourism Public Sector

- Establish a multi-sector working group to oversee the implementation of the HRDSAP;
- Strengthen the human resources and institutional capacity of the MOHT;
- Provide training in industry data collection techniques and processes;
- Design and deliver tourism training for civil servants working in tourism-related activities;
- Provide training to support the development of state / regional tourism councils;
- Provide training to enable the development of destination management organisations (DMOs) and community involvement in tourism; and
- Promote public awareness of the tourism industry including the ASEAN-MRA-TP.

Strategic Programme 2: Tourism Education and Training

- Upgrade tourism curricula, learning resources and materials at every level;
- Strengthen tourism training standards and accreditation systems;
- Improve the quantity & quality of training and teaching staff;
- Strengthen industry and academia linkages;
- Establish tourism training schools in key states and regions;
- Increase access to training and utilise educational technology to maximise learning impact; and
- Strengthen tourist guide training systems and standards.

Strategic Programme 3: Tourism Industry

- Develop a comprehensive set of basic and advanced training packages for the hospitality sector;
- Develop a comprehensive set of basic and advanced training packages for tour operators;
- Ensure good employment legislation and labour relations;
- Strengthen staff recruitment and retention, reduce out-migration of trainees and encourage migrant worker return;
- Address HR challenges affecting the handicraft sector;
- Strengthen the management and member services of the MTF and affiliated associations; and,
- Support the development of management and leadership of tourism businesses.

As an extension of the wider Myanmar Tourism Master Plan, the HRDSAP also advocates mainstreaming seven cross-cutting themes: gender equity, environmental sustainability, partnership, innovative financing, regional cooperation, ensuring access for people with disabilities, and consultation and participation.

An indicative budget of US\$17.46 million is required over the next five years to implement the actions set out in the Strategy. 32 of these actions, with a total cost of US\$12.47 million are identified as priority actions. An additional estimated US\$30-40 million is required for a high-priority refurbishment and infrastructure programme to establish tourism training centres in key states and regions. Additional investments to those cited in the work-plan will also be made by GOM to finance equipment costs for education and training facilities, together with staff salaries.

To ensure the continuing efficiency and effectiveness of the implementation framework, an in-depth review of the Strategy will be undertaken in 2020 by MOHT.



INTRODUCTION

The tourism industry is a key economic sector promoted by the GOM to support reform processes, create jobs and stimulate expansion of the wider economy. Myanmar tourism is enjoying strong growth and, based upon a growth in arrivals and tourist revenues which grew by 19% between 2014 and 2015, out-performing other sectors of the Country's economy.¹ It is also a labour intensive and diverse industry composed of a series of supply chains embracing the transport, accommodation, food, restaurant and retail, recreation and entertainment, construction, journalism, IT and financial service sectors. Given this diverse footprint, the industry has significant potential to reduce poverty, as it provides employment opportunities for semi- and unskilled workers in destinations throughout the country, with roughly 60% of entry-level positions taken up by women.²

The high growth scenario of the GOM's 2013-2020 Myanmar Tourism Master Plan (MTMP) forecasts the tourism sector will generate over a million new jobs by 2020. As illustrated in Table 1, most of these jobs are direct employment in the food and beverage, transport services and accommodation sectors. Total tourism-related employment, including direct, indirect and induced employment generated through industry's diverse supply chains including the agriculture, handicrafts, building construction and maintenance, and IT sectors, for example, can be expected to create roughly two million new jobs by 2020.

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

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

Source: Myanmar Tourism Master Plan (2013)

The HRD strategy is centred around a five-year work-plan to strengthen Myanmar's tourism-related human resources, which relates mainly to the direct employment categories highlighted in Table 1. A longer-term view of the sector must be also considered. The travel and tourism industry is regularly described as be the world's largest and fastest growing industry, enjoying virtually uninterrupted growth since the 1950s. It is also considered the world's largest employer, currently providing direct employment for more than 107 million people worldwide (3.6% of total employment), with a total employment figure of over 280 million jobs (9.4% of total employment).³

From its current humble status as ASEAN's newest and smallest tourism economy, by 2030 Myanmar will likely be receiving upwards of 12 million international visitors per year, with the sector providing direct employment for over 2 million people and a total employment figure of around 4 million jobs⁴. Travel and tourism will likely continue to grow to become the country's number one employer. Hence it is critical to begin laying solid foundations to accommodate this growth. In this sense the HRD Strategy should be read as a preliminary work-plan to create 4 million jobs.

How and where tourism-related employment will be created largely depends upon the commitments and actions of tourism-related planners, including government policy-makers and technicians, as well as entrepreneurs especially in the accommodation, transport and tour operations sub-sectors. To maximise, to the greatest possible extent, income and employment opportunities that benefit poorer households and the wider Myanmar population, Strategic Programme 2 of the MTMP aims to "Build Human Resource Capacity and Promote Service Quality." The first Key Objective of this Strategic Programme, is to "Design a Tourism Human Resource Development and Capacity Building Strategy, while the second Key Objective is to "Establish Programmes and Actions Plans to Implement the National HRD Strategy". It is in this context that GOM's MOHT has formulated the Myanmar Tourism HRDSAP.

¹ ADB Myanmar Country Report 2015

² Myanmar Tourism Master Plan 2013-20

³ World Travel and Tourism Council, 2015

⁴ Based upon current growth trends, the opening of the Hanthawaddy International Airport and further relaxation of visa regulations allowing a growth of visitors through land-border gateways.

The HRDSAP focuses attention upon systems and processes to support human resource management and HR development in the tourism sector (including relevant public sector employees). HR management is concerned with activities such as employee benefits, recruitment, selection, training, performance appraisal, motivation and remuneration. By way of contrast, HR development is concerned with the training and development provided to employees to increase their knowledge, skills, education and ability to help the organisation achieve its goals. The Strategy embraces both HR management and HR development; emphasis given to the two components varies according to specific issues and challenges addressed through the document.

Preparation of the HRDSAP was undertaken between October 2015 and August 2016, with technical assistance provided by Project MYA/001 implemented by LuxDev, the Luxembourg Development Cooperation Agency and financed by a grant from Luxembourg's Ministry of Foreign and European Affairs. The process to prepare the Strategy consisted of three phases (Figure 3).

At the outset of Phase One, to oversee the design and content of the HRDSAP, a multi-sector working group was formed with representation from key government, private sector and development partner stakeholders (Table 2). The roles and responsibilities of the group were to:

- Ensure quality and integrity in the design and approach of 10 background and contextual research strands;
- Facilitate access to key contacts and informants able to assist with research;
- Help source relevant data and research;
- Assist with the review of research outputs from the 10 needs assessments to ensure content quality;
- Inform decisions as to the timing and location of focus group meetings;
- Contribute ideas and suggestions to inform the content, substance and direction of the HRDSAP; and,
- Review the final form and content of the HRDSAP.

The working group met three times over the design and approval process.

Table 2: Members of the HRDSAP Working Group

Government Sector⁵	Private Sector	Development Partners
Ministry of Hotels and Tourism	Myanmar Tourism Federation	LuxDev
Ministry of Education	Union of Myanmar Travel Association	Swisscontact
Ministry of Labour, Immigration and Population	Myanmar Hospitality Professionals Association	International Labour Organization
Ministry of Planning and Finance	Myanmar Tourism Human Resource Development Association	Myanmar Centre for Responsible Business
	Myanmar Hotel Association	World Bank
	Myanmar Tourist Guide Association	Asian Development Bank
	Myanmar Restaurant Association	GIZ
	Foreign Direct Investment Hotels – General Managers Group	

⁵ The HRDSAP was developed over the 2015 general election, the Working Group was initially composed of the Ministry of National Planning and Economic Development and the Ministry of Finance before the two Ministries were merged.

The design of the HRDSAP encompassed 10 research strands, to provide a detailed analysis of public and private sector as well as training and education human resource issues. The research strands and the methodologies employed are described in Box 1, and serve as annexes⁶ to the HRDSAP.

During Phase Two, and following the completion of the research strands four regional stakeholder workshops were convened to:

- Present and verify research findings;
- Propose possible key objectives for the strategy; and,
- Identify key actions to carry each key objective forward to implementation.

Target participants for these workshops included government, private sector and development partner stakeholders, with workshop outcomes contributing to the first full draft of the HRDSAP.

The first full draft of the HRDSAP was prepared in Phase Three, and presented to the working group on 12th July 2016, with a revised draft widely circulated to stakeholders for comment and final adjustments. A final document was submitted to GOM for cabinet approval in August 2016. Through the various one-to-one meetings, focus group discussions and workshops, some 1,000 representatives of government, the private sector, civil society and development partners contributed towards the design and content of the strategy.

The HRDSAP begins with a situation analysis, and an appraisal of regional factors influencing Myanmar’s tourism sector. Opening paragraphs include a brief summary of ASEAN-related issues including the Mutual Recognition Agreement on Tourism Professionals, which has especially strong implications for the sector’s future. This is followed by a review of national industry trends against trajectories for sector income, employment and visitor arrivals set out in the MTMP. Conclusions are drawn from these trends, with priority states/regions and destinations identified for the delivery of tourism HR development interventions.

The situational analysis and overall structure of the HRDSAP embraces three main components and strategic programmes, namely: tourism public sector; tourism education and training; and, tourism industry. The situation analysis together with the Strategy’s recommendations, draw heavily upon the 10 research strands that underpin the HRDSAP.

In Section II, the vision for Myanmar tourism HR development is set out, and follows with a breakdown of aims for the three strategic programmes. The key objectives for each strategic programme are presented, with a concluding section focusing upon implementation and monitoring frameworks. Appendix 1 provides a five-year work-plan, which identifies priority actions to be carried forward in the short and medium term.

Figure 3: Process to Prepare the HRDSAP

PHASE 1	<ul style="list-style-type: none">• Formation of HRDSAP Working Group• Undertake 10 research strands, embracing literature reviews, interviews and focus group meetings
PHASE 2	<ul style="list-style-type: none">• Present research findings at four regional workshops, Yangon, Mandalay, Dawei, Nay Pyi Taw• Propose and prioritise HRDSAP Key Objectives
PHASE 3	<ul style="list-style-type: none">• Draft HRDSAP, present to Working Group and amend• Circulate draft final to stakeholders and amend• Submit HRDSAP for cabinet approval

⁶ The 10 research strands serve as stand-alone annexes to the HRDSAP and are available separately, whereas appendices are included in this document in the form of an action plan, overview of the Myanmar tourism sector, etc.

Box 1: 10 Research Strands Underpinning the Tourism HRDSAP

Strand 1: Public sector stakeholder interviews

The MTMP notes 25 ministries have tourism-related roles and responsibilities. Questionnaires and interviews were undertaken with these ministries, and meetings convened with state / regional cabinet officials to assess HR development needs related to responsible tourism planning.

Strand 2: A study of HR managers in the industry

Designated HR managers drawn from hotel and tour companies, selected on the basis that they are exclusively involved with that function, were interviewed to determine current training practices and approaches, and the level of investment in training.

Strand 3: A survey of tourism enterprises

Owners/Managers from tourism enterprises and representative of industry sub-sectors were surveyed to secure insights into HR issues from across a broad spectrum of tourism enterprises, at a range of locations across the country.

Strand 4: Meetings with micro, small and medium size enterprises

The tourism industry is largely composed of micro, small and medium sized enterprises. Focus group meetings with hoteliers, restaurateurs, tour operators and handicraft businesses were convened to elicit views and opinions of these enterprises and consider how their HR needs can best be met.

Strand 5: A survey of representative and professional bodies

Focus group meetings with each of the associations under the MTF were convened to secure inputs and insights from employer, professional and industry groups. Meetings with different chapters of the associations were undertaken in selected destinations.

Strand 6: A study of tourism education providers

Site visits to tourism schools, colleges and universities were made to (i) appraise the current status of tourism education, (ii) evaluate the standard and capacity of the establishments and training, and (iii) consolidate information on all tourism related training programmes, materials and resources available. In-house focus groups with senior management and teachers were also staged to assess staff capabilities and training needs.

Strand 7: A study of opportunities for women and ethnic nationalities in tourism

In consultation the Myanmar Women Entrepreneur's Association and development partners working in this area, research was carried out on vocational training and employment opportunities for women and ethnic nationalities in tourism.

Strand 8: A study of the institutional capacity of the MOHT

A review of the management structure, including job profiles, responsibilities, decision-making procedures and the skills and capabilities of managerial and administrative staff was undertaken. Results were mapped against needs to implement the MOHT's annual work plans and the MTMP.

Strand 9: A study of regional initiatives

A review of regional issues, particularly related to the ASEAN Tourism, was undertaken to identify tourism HRD initiatives of benefit to Myanmar.

Strand 10: A study of tourist guide training

A review of tourist guide training systems and licensing processes was undertaken to identify recommendations to improve the quality of tour guide training and upscale its delivery. This assessment was completed by UKAid's "Business Innovation Facility". Key recommendations are being carried forward by International Labour Office's Skills for Trade and Economic Diversification Programme (ILO-STED).

CURRENT SITUATION

Regional Issues

As depicted in Table 3, the tourism industry continues to expand throughout ASEAN with total arrivals growing from 81.2 million in 2011, to over 108 million in 2015. Although the lion's share of the ASEAN market is enjoyed by Malaysia, Singapore and Thailand their market share decreased from 70.1% in 2011 to 65% in 2015, with the major beneficiaries of increased arrivals being Cambodia, Myanmar and Viet Nam. While Myanmar received the lowest number of annual arrivals in ASEAN between 2011 to 2015, its share of the growth over this period increased from 1% in 2011 to 4.3% in 2015 and overall growth over this period was the highest in the region at 41.8 %⁷.

Table 3: ASEAN International Visitor Arrivals, 2011–2015 (000s)

Country	2011	2012	2013	2014	2015	Share % (2015)	Change% 2011-2015
Brunei Darussalam*	242.1	209.1	225.0	200.1	218.2	0.2	-2.0
Cambodia	2,881.9	3,584.3	4,210.2	4,502.8	4,775.2	4.4	10.6
Indonesia	7,649.7	8,044.5	8,802.1	9,435.4	10,406.7	9.5	6.3
Lao PDR	2,723.6	3,330.1	3,779.5	4,158.7	4,684.4	4.3	11.1
Malaysia	24,714.3	25,032.7	25,715.5	27,437.3	25,721.2	23.6	0.8
Myanmar	816.4	1,059.0	2,044.3	3,081.4	4,681.0	4.3	41.8
Philippines	3,917.5	4,272.8	4,681.3	4,833.4	5,360.6	4.9	6.5
Singapore	13,171.3	14,491.2	15,567.9	15,095.2	15,231.5	14.0	2.6
Thailand	19,098.3	22,353.9	26,546.7	24,779.8	29,881.1	27.4	9.4
Viet Nam	6,014.0	6,847.7	7,572.4	7,874.3	7,943.6	7.3	5.7
TOTAL	81,229.0	89,571.6	102,199.0	101,429.1	108,903.8		6.0

* figures for international arrivals by air only

Source: ASEAN Secretariat

According to the United Nations World Tourism Organisation, total international arrivals to ASEAN are expected to increase to 123 million by 2020, 152 million by 2025, and 187 million by 2030. Myanmar can expect to receive a growing share of these arrivals.

As noted in the MTMP, through its regional cooperation and integration programmes, Myanmar participates in the tourism-related initiatives of ASEAN, the Greater Mekong Subregion Economic Cooperation Programme, the Ayeyawady-Chao Phaya-Mekong Economic Cooperation Strategy, and the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation. From an HR perspective the most significant of these integration programmes is the ASEAN Tourism Agreement, and the MRA-TP.

The MRA-TP aims to:

- increase the mobility of tourism labour across the ASEAN region in line with ASEAN policy;
- address imbalances between supply and demand for tourism jobs across the ASEAN region;
- establish a mechanism for the free movement of skilled and certified tourism labour across the ASEAN region; and,
- contribute to improving quality of tourism products and services and raise standards. The MRA-TP provides a mechanism and framework to align tourism certification procedures and qualifications across ASEAN.

Importantly, under the MRA-TP, for a foreign tourism professional to be recognised by other ASEAN Member States and be eligible to work in a host country, they need to possess a valid tourism competency certificate for a tourism job title set out in the Common ASEAN Tourism Curriculum (CATC). The competency certificate should be issued by the Tourism Professionals Certification Board⁸, or equivalent, of the member country. The 32 job titles covered under the MRA-TP are shown in Table 4 under the two labour divisions of hotel services and travel services with sub-divisions of Front Office, Housekeeping, Food Production, Food and Beverage Service, Travel Agencies, and Tour Operation.

⁷ Myanmar's significant growth in visitor arrivals includes border crossings by nationals from neighbouring countries, an unknown percentage of whom likely stay in the country for less than 24 hours and therefore might be defined as 'excursionists' rather than 'tourists' (also see below).

⁸ In the case of Myanmar this responsibility lies with the National Skills Standards Authority of the Ministry of Labour, Immigration and Population.

Table 4: The Labour Divisions and 32 Job Titles Covered Under the ASEAN-MRA-TP

HOTEL SERVICES				TRAVEL SERVICES	
1	2	3	4	5	6
Front Office	House Keeping	Food Production	Food and Beverage	Travel Agencies	Tour Operation
Front Office Manager	Executive Housekeeper	Executive Chef	F&B Director	General	Product Manager
Front Office Supervisor	Laundry Manager	Demi Chef	F&B Outlet Manager	Assistant General Manager	Sales & Marketing Manager
Receptionist	Floor Supervisor	Chef de Partie	Head Waiter	Senior Travel Consultant	Credit Manager
Telephone Operator	Laundry Attendant	Commis Chef	Bartender	Travel Consultant	Ticketing Manager
Bell Boy	Room Attendant	Commis Pastry	Waiter		Tour Manager
	Public Area Cleaner	Baker			
		Butcher			

To advance the MRA-TP, the ASEAN Tourism has produced 242 sets of training materials (commonly known as toolboxes) covering the 32 job titles across the labour divisions. While these toolboxes have been approved for implementation throughout ASEAN, a number of ASEAN countries including Myanmar face challenges in terms of: raising government industry awareness of MRA-TP systems and processes; adapting the toolboxes to the national and local context; training trainers to impart the toolbox materials; and, establishing sufficient training centres to deliver training. To move the MRA-TP forward in Myanmar: MOHT's International and Regional Cooperation Department provides on-going briefings to industry stakeholders; 31 national trainers and 11 national assessors have been trained in the use of the toolboxes; and, MOHT and Project MYA/001 have developed a methodology and trained 32 trainers to begin "unpacking the toolboxes" to allow for their take up by training providers. Further work is needed to: (i) raise greater national and industry awareness of MRA-TP systems and processes; (ii) train additional trainers and assessors; (iii) continue unpacking the toolboxes to prepare lesson plans; and, (iv) make lesson plans and training materials available to public and private sector training providers.

Turning to ASEAN Tourism interventions, Strategic Direction 1.4 of the recently endorsed ASEAN Tourism Strategic Plan 2016-2025 centres upon Raising Capacity and Capability of Tourism Human Capital. Activities in the first two-year work-plan of this Strategic Direction, include:

- interventions to adopt and implement competency standards for Meetings/Incentives/Conferences/Exhibitions tourism;
- Design HRD plans to promote heritage tourism, cruise tourism and ecotourism;
- Develop an ASEAN Tourism Professionals Registration System⁹ to allow for the registration of tourism professionals, facilitate skills and experience screening and their travel between countries; and,
- Deploy a training of trainers' programme for Master Trainers and Master Assessors for travel agencies and tour operators.

GOM welcomes development partner support to assist with the implementation of these work programmes.

⁹ Available now at: <http://atprs.staging.netreturnconsulting.com.au>

National Trends

A number of issues are reviewed to illustrate trends in tourism income, employment and investment, together with visitor arrivals, spending and movement patterns around the country. This analysis identifies where HR investments are needed to meet industry growth and supply trends. While Appendix 2 provides a review of recent trends, key points are summarised as follows.

Myanmar's estimated international tourism receipts increased sharply from \$319 million in 2011 to \$2,122 million in 2015. While GOM's 2014 national census data notes there are 21,872,539 employed persons over the age of 15 years in Myanmar, the data does not identify the number of persons employed in the tourism and hospitality sector.¹⁰ The World Travel and Tourism Council (WTTC) meanwhile estimates that in 2014 travel and tourism in Myanmar directly supported 505,000 jobs (1.8% of total employment), with total employment (direct, indirect and induced) providing 1,134,500 jobs (4% of total employment).¹¹ Evidence suggests roughly 60% of those employed are likely to be women.¹²

With a compound growth rate of 41.8%, international visitor arrivals increased from 816,369 in 2011, to 4,681,020 in 2015. While the 2015 arrivals figure exceeds the 2015 high-growth forecast of the MTMP, entry point data in Table 5, illustrates the majority of arrivals (72.1% in 2015) enter Myanmar via its land-borders. Of these a significant 65.7% entered via the Eastern Region gateways of Tachileik and Mong La followed by 19.9% through the North Eastern Region and 11.5% through the South Eastern Region.

Table 5: International Arrivals into Myanmar by Entry Point, 2011-2015

Gateway	2011	2012	2013	2014	2015	CAGR (%)	Share 2015 (%)
Yangon	364,743	559,610	817,699	1,022,081	1,180,682	26.5	25.2%
Mandalay	20,912	32,521	69,596	90,011	107,066	38.6	2.3%
Nay Pyi Taw	5,521	1,250	11,842	19,261	13,835	20.8	0.3%
Land Borders	425,193	465,614	1,144,146	1,949,788	3,379,437	51.4	72.2%
TOTAL	816,369	1,058,995	2,043,283	3,081,141	4,681,020	41.8	100.0

Source: MOHT, 2015

It is likely many land border arrivals are day-visitors staying in the country for less than 24 hours. The border entry segment represents the fastest growing arrivals market, with a compound growth rate of over 50%, followed by arrivals entering into Mandalay (38.6%) and Yangon (26.5%). Significantly, GOM is working to streamline visa formalities and, from September 2016, will make the e-visa system available for visitors entering via land borders. Tachileik, Myawaddy and Kawthaung are the first three border points opened to e-visas and, together with transit routes into the country, are priority areas for HR planning and support. Yangon is however likely to continue as the second most popular gateway, with a record 1.18 million arrivals in 2015. While this figure is expected to climb in 2016 and 2017 with the redevelopment of Yangon's International airport, it is noted industry operators report a down-turn in tour group market and an increase in independent traveller market. Reasons for this are likely the high cost of accommodation and tour group packages compared to neighbouring countries.

Monthly data in Figure 4, depicting arrivals at Yangon's International Airport between 2012 and 2015 illustrates a continued pronounced difference between the high and low seasons. This ingrained pattern has growing implications for the tourism labour market, and marketing actions are needed to promote a more balanced spread of arrivals throughout the year.

Domestic tourism is also an important market with visitors outnumbering international arrivals, and WTTC estimating a 50:50 split in domestic and foreign tourism spending in 2014. While no government data is available, media reports suggest there were five million domestic tourists in 2015, with Taunggyi, Inle Lake, Pindaya, Bagan, Mt Poppa, Alaungdaw Katthapa, Shwesattaw, Kyaikhto and Chaungtha beach being the most popular destinations.¹³ Domestic tourists have travel patterns and behaviours as well as service requirements that are markedly different to their international counterparts. Pilgrimage tours to religious sites are an especially important feature of the domestic market, with high visitation often presenting increasingly challenging destination management problems during festival periods.

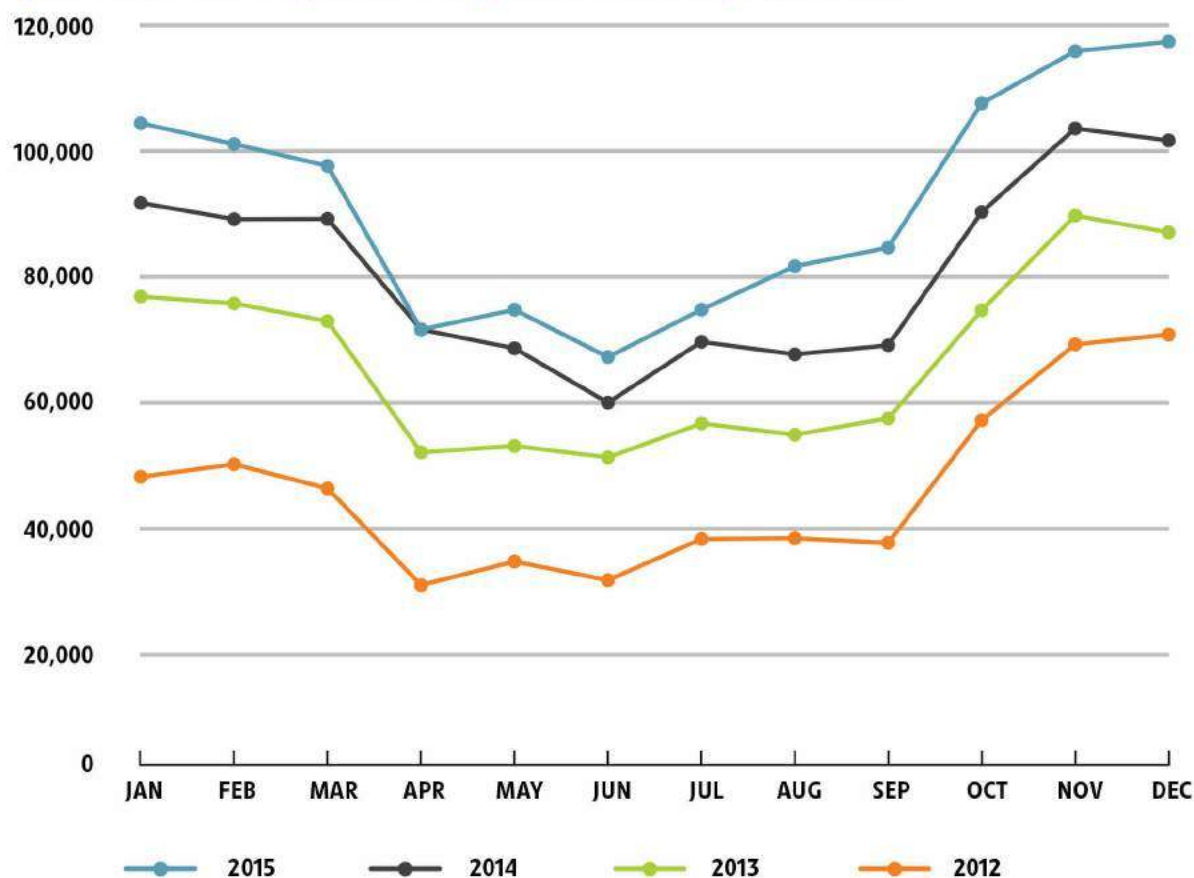
¹⁰ GOM 2016: The 2014 Myanmar Population and Housing Census The Union Report: Occupation and Industry Census Report Volume 2-B.

¹¹ Travel and Tourism: economic Impact Myanmar 2015, WTTC, accessed at: <https://www.wttc.org/-/media/files/reports/economic%20impact%20research/countries%202015/myanmar2015.pdf>

¹² Myanmar Tourism Master Plan 2013-2020.

¹³ <https://flyinmyanmar.wordpress.com/2014/07/25/domestic-tourism-industry-sees-comeback/>

Figure 4: Visitor Arrivals by Month at Yangon International Airport, 2012-2015



Source: MOHT, 2015

In 2013 the MTMP noted international tourism was largely confined to a central band of Myanmar with limited visitation in the far north and south. Figure 1 (page 4) depicts the status and growth in international arrivals for the 14 states and regions between 2011 and 2015, while Figure 2 (page 5) depicts total bed-nights for international arrivals in the states and regions between these years. Data upon which these illustrations are based (see Appendix 2) illustrate:

- Yangon, Mandalay, Tanintharyi, Shan and Bago are the top five states/regions in terms of visitor arrivals;
- Yangon, Mandalay, Tanintharyi and Shan received total bed-night counts in excess of 400,000 nights, followed by Mon, Bago, Nay Pyi Taw and Rakhine with totals between 199,000 and 240,000 bed-nights per year;
- Kayah State received the highest compound growth of total bed-nights between 2013 and 2015, with a 152% increase in bed-nights, followed by Sagaing (33.5%), Shan (28.2%), Kachin (26.4%) and Kayin (23.8%) – most of these states/regions were however starting from considerably lower base rates than the top five visited states/regions; and
- the data supports the proposition that the great majority of border gateway arrivals entering Myanmar via its Eastern and North Eastern Region borders do not stay overnight, whereas a greater percentage of border gateway arrivals entering the South Eastern Region do stay overnight.¹⁴

Data depicting the growth in accommodation establishments in key destinations between 2013 and 2015 (see Appendix 2) confirms that investment is occurring in the states and regions with the highest visitor growth rates. Collectively, the data illustrates where tourism-related HR interventions should be prioritised, namely in the states / regions and destinations enjoying, (i) the highest number of visitor arrivals and bed-nights, and (ii) the highest visitor and accommodation growth rates.

To help diversify the tourism product and encourage greater visitation to new sites, a key policy of the new government is to promote community-involvement in tourism or community-based tourism (CIT/CBT).¹⁵ GOM is working to: raise government and industry awareness of good practice CBT models, steps and processes; and to raise stakeholder capacity and deliver training to design and implement such projects. One of Myanmar's first CBT products, has been successfully developed in Magway's Myaing Township by Action Aid and Journeys Adventures project. Appendix 3 provides an overview of the project and steps that laid the foundations for its success, which will be used as a basis for training and education purposes.

¹⁴ There are however data limitations as arrivals may stay in accommodation where overnight stays by international visitors are unreported. Moreover a large percentage of Tanintharyi arrivals are likely to be Thai tourists staying only at the Andaman Club Casino resort, near the Kawthaung entry point.

¹⁵ The terms community-involvement in tourism, and community-based tourism are used interchangeably throughout the Strategy.

Public sector

Key issues

Tourism is a diverse and pervasive activity requiring strong coordination of investments by the public and private sectors. Government roles in tourism planning and management are many and varied. They extend, for example: from delivering efficient investment processes, to gathering a variety of visitor economy data; from developing forms of tourism that conserve biodiversity and revitalise culture, to waste management around destinations; and, from activities to prevent the exploitation of children, women and ethnic people, to supplying and incentivising the efficient use of energy and water by accommodation and tour operation providers.

A wide variety of policies, laws and related procedures influence these and other tourism governance areas. Moreover, global experience confirms policy and legal processes across government ministries are not always well aligned, and may even conflict with one another in the tourism development arena. Hence, coordination across government ministries and departments is critical to promote a whole-of-government approach to sector development.

The MTMP suggests 25 ministries have tourism-related roles and responsibilities. It also emphasises that responsible tourism, as a market-oriented strategic objective that seeks to 'do no harm' and maximise the sector's potential to alleviate poverty, demands an integrated approach to sector planning and management. This whole-of-government approach is needed at the centre, state / regional, as well as district and township levels where tourism activity is a growing phenomenon presenting numerous and growing challenges for GOM.

Key HR issues highlighted in the HRDSAP "Research Strand 1: A Review of Public Sector Stakeholders" are summarised in Box 2, and provide a basis for defining key objectives and actions of this strategy. The full research strand review provides additional substance and coverage of public sector support to facilitate and guide a whole of government approach to national, state/regional and local tourism planning.

Box 2: Key Issues Highlighted in Tourism Public Sector Research

- Change processes underway in Myanmar place a wide variety of new demands on government staff at all levels, often at a pace that surpasses the number of staff available or that exceeds current skill sets.
- Although the tourism industry is of very high interest to many ministries and all state / regional governments, a lack of industry exposure, knowledge and skills across different government ministries and at all government levels, severely constrains the sector's development potential.
- In terms of destination planning and management, four key ministries require more tourism knowledge and technical skills than others, namely: Hotels and Tourism; Natural Resources and Environmental Conservation; Culture and Religious Affairs; and, Home Affairs (General Administration Department and the Tourist Police Department).
- While tourism is cited as one of three development priorities for most state / regional governments, state / regional governments largely rely on the Union Government for destination planning assistance.
- A lack of tourism knowledge and technical skills are key constraints holding back the formation of State/ Regional Tourism Councils and Destination Management Organisations (DMOs) as advocated and prescribed in the MTMP.
- The lack of industry management knowledge suggests that in most cases responsible tourism planning and management at the destination-level requires some form of development partner assistance.
- Performance measures and indicators for Myanmar's tourism sector, including HR and employment targets, have yet to be clearly defined and a "Tourism Technical Authority" to gather market intelligence and performance data has yet to take shape.

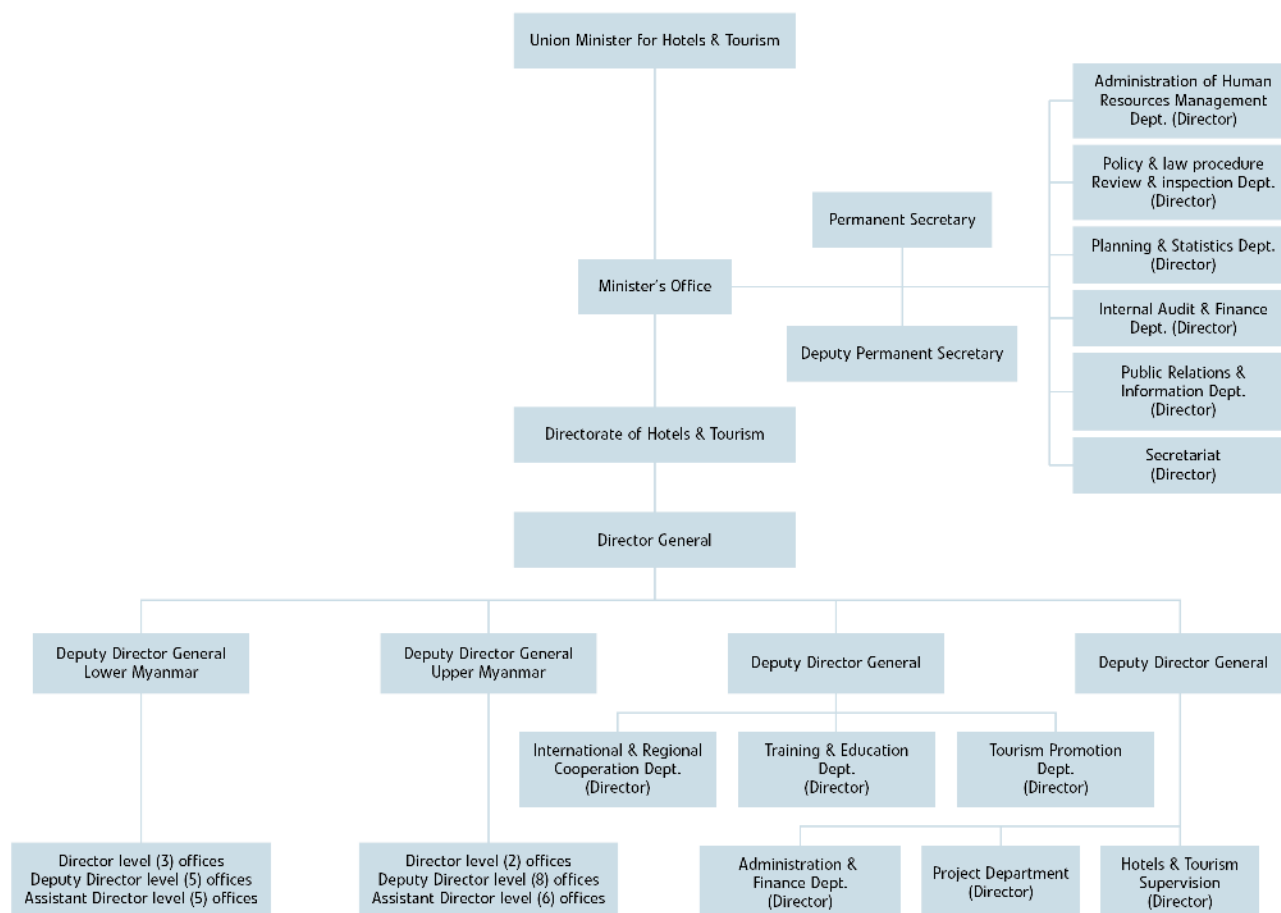
Ministry of Hotels and Tourism

The MOHT is GOM's designated agency with a mandate to guide the development of tourism in Myanmar. Key functions of the MOHT are to:

- Supervise the performance of the MOHT's Directorate in accordance with the law;
- Implement systematic development of Myanmar's tourism industry;
- Communicate with foreign countries, international organisations, other organisations and persons in respect of the hotel and tourism industry;
- Convene discussions, seminars and exhibitions to improve the quality and standards of the hotel and tourism industry, and disseminate related technical knowledge;
- Approve, cause alternations or refuse project proposals for hotel and accommodation businesses;
- Determine the type, classification or business requirements for each hotel and accommodation business;
- Determine the type and business requirements of the tourism industry;
- Determine hotel and tourism zones;
- Coordinate with relevant government departments and organisations to facilitate entry visas and extensions for foreign visitors;
- Coordinate with relevant government departments and organisations to form and define the functions of tourism and hotel supervisory bodies in states, regions, districts and townships;
- Determine the licence fee, licence renewal fee, licence fine and duties and taxes relating to the hotel and tourism industry; and,
- Submit to the government progress reports on activities relating to the hotel and tourism industry.¹⁶

The MOHT's workforce is currently comprised of 201 management officers and 1,100 administrative staff including those serving in the states and regions. Having undergone restructuring exercises in 2012 and 2015, and as depicted in Figure 5, MOHT is comprised of the Directorate of Hotels and Tourism responsible for planning, training, promotion, regional cooperation and regulation; and the Minister's Office responsible for policy and law procedures, planning and statistics, audit and finance, and public relations.

Figure 5: Organisational Framework of the Ministry of Hotels Tourism



Box 3: Key Issues Highlighted in the MOHT Training Needs and Capacity Building Assessment

- MOHT is expanding its work programmes and responding to unprecedented demands and applications for industry training and business licenses.
- There is a shortage of IT equipment, systems and hardware to support the MOHT's expanding work programmes.
- Similar to other ministries, the majority of MOHT staff have new job descriptions, roles and responsibilities and are required to learn new skill sets and work processes.
- Four key and pressing areas of learning for MOHT staff are defined as: (i) tourism technical knowledge (to build an understanding of the global tourism industry, tourism policy and planning environments, and destination management processes, etc.); (ii) English language training (as the ASEAN common language, to maximise industry learning opportunities, to respond to emails and letters, write speeches, engage with investors and development partners); (iii) computing and IT skills (for effective communication, and implement work-plans efficiently); and, (iv) management and organisational development (to facilitate self-learning, team-building skills, performance management and respond to changing work conditions).
- The lack of ICT Skills and IT equipment is especially acute in state / regional and branch offices.

To facilitate implementation of the MOHT's mandate, HRDSAP "Research Strand 8: A Study of the Institutional Capacity of the Ministry of Hotels and Tourism", was undertaken to assess and define training and capacity building needs. Key issues highlighted in this assessment are set out in Box 3, and provide a basis for the key objectives and actions of this Strategy. The full report contains detailed findings of questionnaires completed by all managerial and technical staff, outcomes of validation workshops to agree training priorities, and a work-plan to help structure and deliver training and human resource development activities.

Tourism Education and Training

Sub-sections below explain how tourism education and training fit within the context and structure of GOM's wider education and training provision, and its associated qualifications framework. A more detailed breakdown of the complex issues covered in this section, is provided in the HRDSAP's "Research Strand 6: A Study of Tourism Education and Training Providers."

Myanmar education system

Myanmar's education and training system follows a structure common to most countries, composed of five recognised sub-sectors.

Sub-sector 1: Early childhood care and development

The Ministry of Education (MOE) and the Ministry of Social Welfare, Relief and Resettlement are involved in the provision of early childhood care and education.

Sub-sector 2: Basic Education

The new basic education system outlined in the National Education Law (2014) comprises of five years of primary education, four years of lower secondary and three years of upper secondary education. There are currently 44,159 basic education schools in Myanmar reaching approximately 8.6 million students.¹⁷

Sub-Sector 3: Non-formal Education

MOE delivers non-formal education through a Primary Education Equivalency Programme, and a Summer Basic Literacy Programme. Additional opportunities of non-formal education can be accessed through Community Learning Centres established across the country and a variety of non-formal training opportunities in both government and private centres.

Sub-Sector 4: Higher Education

Myanmar has 163 higher education institutions (universities, degree colleges and education colleges), which are overseen by 13 ministries (Table 6). In the 2013 academic year, 174,845 students were studying full-time in higher education institutions, while an additional 310,942 students were accessing higher education through Distance Education Universities.

¹⁷ Myanmar HRDSAP Research Strand 6: A Study of Tourism Education and Training Providers

Table 6: Number of Higher Education Institutions under 13 Ministries in 2011–2012

No.	Ministry	Number
1	Education	66
2	Health	15
3	Science and Technology	61
4	Defence	5
5	Culture	2
6	Environmental Conservation and Forestry	1
7	Agriculture and Irrigation	1
8	Livestock Breeding & Fisheries	1
9	Co-operatives	5
10	Union Civil Service Board	1
11	Religious Affairs	1
12	Border Affairs	2
13	Transport	2
TOTAL		163

Source: Department of Higher Education (Lower Myanmar), MOE (2012)

Sub-Sector 5: Technical and Vocational Education and Training (TVET)

Myanmar has some 372 technical and vocational schools and training centres, which are managed by 18 ministries and the private sector. A Myanmar National Qualifications Framework (Table 7) is being prepared that closely aligns with the European model and the ASEAN Regional Qualification Framework. The Framework provides coherence for qualifications at vocational and academic levels, and indicates progression between levels and qualifications.

Recognising the need to strengthen and modernise Myanmar's education sector, and the central importance of this agenda to the Country's development, a Comprehensive Education Sector Review was launched in 2012. The review, completed in 2015 and awaiting endorsement by GOM, identifies three strategic areas of work: (i) expand access to education and training; (ii) strengthen quality and relevance; and (iii) strengthen coordination and management. Each is relevant to the design and delivery of tourism education and training.

Table 7: Myanmar's Education System

Level	Sectors			Lifelong Learning
	Basic Education	TVET	Higher Education	
8			Doctoral Degree	Recognition of Prior Learning (assessment and validation)
7			Masters Degree	
			Post Graduate Diploma	
6		Degree	Bachelors Degree	
5		Advanced Diploma	Associate Degree	
		Diploma	Diploma	
4		*V&T C/SC 4		
3		V&T C/SC 3		
2	High School	V&T C/SC 2		
1	Middle School / Primary School	V&T C/SC 1		

* Vocational and Technical Certificate / Skills Certificate

Tourism education and training overview

A diversity of public and private sector providers as well as NGOs and development partners are engaged in the delivery of tourism education and training. Public sector provision includes the delivery of higher (tertiary) education, and TVET, including mobile hospitality training delivered by MOHT. Tourism does not yet feature in the primary or secondary curriculums of GOM schools, although the inclusion of tourism-related topics may occur, for example, in the delivery of geography or social studies curricula.

For higher education a four-year Bachelor of Arts (BA) in Hospitality and Tourism Management is delivered by the National Management College in Yangon, and the Mandalay Degree College in Mandalay. For its 2015 intake, the National Management College received 500 applications on the first day for the BA's 150 available seats. Both institutions will commence delivery of a Master of Arts also in Hospitality and Tourism Management from December 2016. In other words, Bachelor and Master degrees are in short supply, and inputs are needed to raise standards and ensure quality content. Efforts are underway to deliver the BA in Hospitality and Tourism Management from Taunggyi University.

The delivery of tourism-related TVET by GOM is provided through various categories of training institutions around the country. Besides hospitality and tourism, subjects that feed into tourism-related employment embrace domestic science courses such as cookery, sewing/tapestry, handicrafts, wickerwork and sculpting, as well as technical courses such as masonry, carpentry, plumbing, mechanics and IT. Put another way, TVET training and education is of particular relevance and importance to the tourism sector. Formerly delivered by a mix of ministries, TVET provision is a complex picture currently being restructured and consolidated under the MOE. Findings from the TVET component of the Comprehensive Education Sector Review conclude:

- training is fragmented, there are 18 different ministries offering various forms of training, often with minimal national coordination;
- training is often disconnected from industry and labour market needs;
- there are no set, widely understood and accepted industry/competency standards or qualifications, and no formal accreditation system;
- quality and relevance of training, training materials, teaching, equipment and facilities are lacking;
- there are problems of access to training for disadvantaged, rural and vulnerable people;
- lack of effective career pathways, interlocking programmes and/or qualifications; and
- the outcomes for graduates and employers are unknown and questioned by graduates, employers, prospective students.

To address these issues and bring about change, the National Skills Standards Authority (NSSA), established in 2007, is active in building TVET capacity and reforms, particularly in relationship to standards development and assessment, including for Recognition of Prior Learning, which is in its infancy.

Due to the shortage of hospitality training opportunities within the TVET system in the states and regions, MOHT responds to training requests and delivers rotational short course training in primary and secondary destinations around the country. While trainings focus on TVET levels 1 and 2, training for levels 3 and 4 are also badly needed. MOHT and private teachers provide instruction in the delivery of these trainings. MOHT also delivers national and regional tourist guide training, which is covered separately below.

On the private sector side, over 20 tourism and hospitality training providers clustered mainly in Yangon and Mandalay deliver a variety of predominantly short course training in the hospitality and tourism sectors. Many of these private training providers belong to the Myanmar Tourism HRD Association. Training providers vary significantly in their focus and can be divided into two categories, those that provide (i) further or higher education generally through diploma courses, which includes around 8 institutions, and (ii) technical and vocational education and training, which embraces around 15 institutions. A list of training providers is included as Appendix 5.

A growing number of development partners and NGOs are variously engaged in tourism training and education.¹⁸ Programmes vary in scale from the larger Swisscontact and LuxDev programmes, which focus on industry training for managers and line staff, and others such as the Singapore-Myanmar Vocational Training Institute and the UNESCO supported Centre of Excellence for Business Skills Development, which have invested in college facilities as well as curriculum development, producing training materials and training trainers. International NGOs and local NGOs have also set up culinary schools and cafes in urban locations to train disadvantaged people. Given the sector's growth prospects, and the scale of opportunities and challenges, GOM welcomes further interest and support from its development partners, especially in the states, regions and the priority destinations underscored herein.

Key issues that need to be addressed through the HRDSAP, that were highlighted in "Research Strand 6: A Study of Tourism Education and Training Providers", are summarised in Box 4. These issues provide the basis for the key objectives and actions of the HRDSAP. The full research strand profiles the extent of training and education provided by the public, private and NGO sectors and details specific challenges faced, together with recommendations to strengthen service provision.

¹⁸ For an overview of development partner projects in the tourism sector see: http://themimu.info/sites/themimu.info/files/documents/Tourism_Hospitality_Coordination_Map_MIMU_Swisscontact_Jun2016.pdf

Box 4: Key Issues Highlighted in the Study of Tourism Education and Training Providers

- Strengthening tourism education and training is absolutely critical to meet rapid industry expansion and the demand for qualified workers.
- Many institutions involved in training are in their infancy and under-resourced, making it difficult to deliver quality skills and knowledge, and ensure trainees are competent when taking up jobs in hotels or other tourism businesses.
- The current training system has many problems: shortages of qualified teachers; out-dated 'theory based' curriculum, teaching materials and methods; lack of practical training facilities, equipment and learning resources; student inability to pay the real cost of training; and low public financial support.
- To meet industry needs, tourism education and training providers require supportive government policies and investment in higher and TVET tourism education provision. Particularly important are HR development and capacity building for teachers and trainers, as well as support for curriculum development, teaching and learning resources, library materials and systems.
- Access to higher education is difficult for women due to the expense and need to travel and stay in other locations (women are restricted by a need for trusted accommodation choices such as staying with family or friends).
- A lack of opportunity to study in their own languages is a particular challenge for education and training in ethnic areas, while opportunities to learn English are also constrained due to a requirement to learn English through Burmese, their second language.
- There is a need to: provide alternative delivery modes for pre-TVET material, such as mobile trainers and the use of educational technology including DVDs and mobile phone apps; deliver materials in both Myanmar and regional languages (Mon, Shan, Karen, etc.) to promote learning and quick access to tourism employment in rural areas, for women and ethnic communities.

Tourist guide training

Tourist guides provide many critical roles in any tourism system, from the national to local levels where they are intimately connected to product development processes and enabling visits around destinations. MOHT is GOMs agency responsible for training and licensing tourist guides, and delivers national tourist guide courses from its training centre in Yangon.

In 2015, MOHT trained 484 national tourist guides in Yangon (two-month training), and 780 regional tourist guides through training in Kyaington, Katha, Kawthaung, Kalaw, Myeik and Shwebo (one-month training). In total, Myanmar has approximately 5,630 registered and licensed tourist guides: 3,775 national guides, and 1,855 regional guides (the latter having licenses to operate in the destinations where they were trained). Not all licensed tourist guides go on to work in the sector.

The Business Innovation Facility (BIF) report "Myanmar Tourist Guide Sector: A Policy Framework" supported by MOHT and serving as the HRDSAP Research Strand 10, suggests some 100 guides are either permanently employed or regularly contracted by tour companies, with the majority operating on a part-time and freelance basis in a variety of languages in a range of locations around the country.¹⁹ The report draws on additional industry research by BIF, which concludes:

- "not enough tour guides are being trained at every level, there are acute shortages during peak seasons;
- a lack of local guides is constraining product and destination development, which serves to restrict tourism's pro-poor impact;
- guide training is confined largely to Yangon (although this is starting to change);
- out-dated training materials are used in tour guide training, which are delivered to very large classes with no practical skills or internships applied;
- certified guides lack key skills (language skills and ethical behaviours are particular issues requiring attention);
- there is a lack of career progression for tour guides; and
- the Myanmar Tour Guide Association would benefit from institutional support."²⁰

By way of contrast, and emphasising the need to strengthen and expand training design and delivery, findings from HRDSAP research strands suggest 60% of tour operators believe tourist guides will be the most sought after positions in the future. ILO's STED programme research aligned with the HRDSAP supports this proposition with almost all tour

¹⁹ "Myanmar Tourist Guide Sector: A Policy Framework" undertaken by HamsaHub with funds from UKAid's BIF

²⁰ "Myanmar's Tour Guide Industry - Opportunities for Tourism led Poverty Reduction" undertaken by HamsaHub with funds from UKAid's BIF.

operators surveyed suggesting that a modest or large increase in the number of tourist guides is needed across the country.²¹ Box 5 highlights nine strategic steps identified in the BIF policy framework report to strengthen tourist guide training over the short- and medium-term, while Box 6 highlights additional critical issues identified by ILO's STED Assessment Report (2016). Looking ahead MOHT recognises the need for cooperation with the NSSA and its "Hotel and Tourism Sectoral Committee" to ensure training is carried forward within the wider TVET framework. Issues summarised in Boxes 5 and 6 provide a basis for the key objectives and actions set out in the HRDSAP.

Box 5: Nine Strategic Steps to Strengthen Tourist Guide Training in Myanmar

- Define tourist guide levels, roles and responsibilities.
- Assist NSSA to define competency standards for each tour guide category/level.
- Decentralise training and identifying priority hubs for training delivery.
- Engage MOHT, Myanmar Tourist Guide Association (MTGA) and Union of Myanmar Travel Association (UMTA) to review and strengthen current training delivery.
- Review tourist guide training materials and curriculum.
- Train trainers and occupational experts.
- Identify steps to build MTGA capability.
- Review market conditions and processes to support MTGA and UMTA training delivery.
- Review market conditions for private sector training delivery and systems and processes to accredit trainers and Recognition of Prior Learning Assessors.

Box 6: Key Tourist Guide Training Considerations

Skills

- There is a gap between tourist guide training offered by the government and what the industry demands in terms of curriculum and specialism (for example, nature, culture, trekking guides, etc.).
- Most employers indicate a need to provide additional training to newly employed tour guide staff.
- The top four competencies demanded by tour operators each relate to customer contact experiences, namely: language skills; customer care/customer service skills; public speaking skills; and, time management skills.
- Specialist skills required are, cultural interpretation (58.1%), heritage and history (52.7%), followed by trekking (36.3%) and cooking (10.9%).

Institutions

- There is a need for stronger coordination between NSSA, MOHT, MTGA, and UMTA to deliver a structured tourist guide profession within the national qualifications framework.
- Tourist guides and tour operators are unfamiliar with formal NSSA recognised TVET systems, terminology and programs.

Capacity

- Stronger candidates need to be attracted to enrol in formally recognised tourist guide training programs offered by accredited providers in Yangon and other parts of the country.
- Locations where more tourist guides are in demand include, 1st priority: Kyaukse, Chin State, Hpa An, Inle Lake region; and, 2nd priority: Bagan, Mrauk U/Sittwe, Mandalay.
- Guides see the benefit of having a training system which incorporates 'Recognition of Prior Learning' as part of a formal qualifications structure. They also identified benefits from accredited professional development programs for guides.
- Internships should form part of tourist guide training, and would be valuable for trainees and host businesses.

21 ILO "Skills for Trade and Economic Diversification", Key Assessment Findings and Recommendations on the Tourist Guide Subsector.

Tourism Industry

Four industry sub-sectors are considered in this section, namely accommodation, restaurant, tour operator and handicraft businesses. The section begins with a review of issues related to accommodation, restaurants and tour operators, and secondly looks at issues related to the handicraft sector as a major employer and industry sub-sector. The section concludes with a review of HR issues as they relate to strengthening the management and administration of the MTF and the industry associations amalgamated under their auspices.

Accommodation, restaurants and tour operators

Accommodation providers

As noted in Appendix 2, the accommodation sector (hotels, resorts, guesthouses, bed and breakfast businesses) is expanding rapidly to meet growing visitor demand. Generally, with the exception of a number of well-managed five star properties, visitor feedback suggests many properties are considered expensive, lacking in value for money and with poor quality services compared to neighbouring countries. Unregistered or unlicensed accommodation includes small guesthouses with less than 12 rooms and a limited number of home-stays in the regions. During peak periods visitors are reported to stay in monasteries for a donation.

Restaurants

Myanmar offers a diverse range of restaurants offering services to a wide variety of tourist clientele with different tastes and budgets, from street-fare and market stalls to sophisticated Asian and European outlets.

Tour and travel operators

The majority of Myanmar's 1,906 licensed tour companies are family-run businesses with contracted transport and tourist guides services that lack knowledge and understanding of the dynamics and complexities of the international tourism industry. 39 regionally operated joint ventures and one foreign owned tour company are also registered with the MOHT.

HRDSAP Research Strands 2, 3, 4 and 7, which covered interviews with dedicated HR managers and small business owners, a questionnaire survey and research focused upon women and ethnic nationalities engagement in the tourism sector, were initiated to collate information to assess HR issues and needs across these business sectors. Research centred upon seven issues, namely: recruitment; retention; career development; succession planning; labour policy and contractual issues; training and development; and standards. The following sub-headings report research findings, upon which the key objectives and actions of the strategy are based.

Recruitment

While growing visitor numbers are matched with a parallel need to recruit hotel and restaurant staff, there is a shortage of experienced staff and few new staff entering the industry with necessary skills. Skilled and experienced staff are in short supply, commanding higher and higher wages. This is particularly evident in locations such as Nyaung Shwe and Bagan where smaller recruitment pools are available.

New recruits into tour operations are often university graduates with higher career expectations than their hospitality counterparts. New recruits into hotels and restaurants are often low-skilled with little industry knowledge. Managerial recruitment usually involves enticing staff from other businesses. The general perception of a career in hospitality is low amongst young people; employment in tour operations is seen as a preferred career path.

The small recruitment pool is a particular problem in rural areas, where employees are selected on personal attributes such as attitude and presentation, rather than hospitality skills and knowledge. Foreign language skills are highly valued. Quality skilled recruitment is difficult in all industry sectors. Word of mouth is the most successful method, although larger hotels use Internet and newspaper advertisements. There is little relationship between the hospitality industry, and training and education institutions with regard to graduate recruitment.

Staff retention and turnover

Most businesses surveyed experience low retention of staff, with a turnover often as high as 60% to 80% per year, which is vastly higher than the global average. Tour operators have a significantly lower turnover, which is primarily a result of recruiting staff with higher initial skill levels. Specifically, 83% of respondents in the online survey indicated that staff turnover is a problem for their organisation with the most cited cause of staff turnover being 'salary and remuneration issues.' The demand for jobs in the accommodation sector is far greater than the supply, and there is little loyalty to employers.

The second most frequently cited cause of staff turnover is 'working environment', which relates to the long-hours characteristic of the hospitality sector. Other reasons for staff turnover include:

- probation period, typically offered by employers for the first three months with the objective of testing a prospective employee (probation periods in Myanmar can include a lower salary);
- poor human resource management with inexperienced line managers and uncaring owners; and
- lack of opportunity for professional development, as many businesses are reluctant to train staff for fear they will leave for a higher paid job at a competitor.

A volatile salary market is cited as an issue affecting staff retention and was highlighted as a major contributor to high staff turnover in all hotels and restaurants. Many staff change employers to receive just a small salary increase.

Career development and succession planning

A systematic approach to career development and succession planning is less evident in hotels and restaurants than in tour operations. Although there is evidence of staff progressing through larger businesses, it is generally no further than supervisory level. Due to the size of businesses, career progression often requires employees to move to different employers.

Tour operators are better aligned to internal promotion and career development due to their size and specific training provided to support employee development; the potential for growth due to increasing numbers of tourists was also highlighted as a strong reason for internal career development and succession planning.

Labour policy and contractual issues

While there is a good general understanding of recent Labour Laws by businesses, a number of concerns exist including the minimum wage and standard working hours.

The 2013 Minimum Wage Law that established a mandatory daily rate of 3,600kyat (in businesses with more than 15 employees) is considered unrealistic and untenable by the hospitality and tourism industry. The Law does not take into account remuneration differences between industry sectors. For example, many tourism and hospitality staff receive benefits such as meals, accommodation, transport, uniform and service charge / tips above and beyond their basic salary.

Due to the seasonal nature of Myanmar's tourism industry, many hotels close or downsize during the low season. To retain staff during periods of inactivity many hotel and restaurant staff are paid a small salary or stipend whilst not working. Down time is often used by hotels and restaurants to provide staff training, and staff are sometimes utilised in renovations, decoration or repairs. These arrangements are generally non-compliant with labour law.

Establishing a working week with the stipulation that supplementary payments are paid for working 'unsociable hours' such as Sundays and public holidays does not take into account that businesses need to function on those days. Statutory paid leave, severance packages and notice periods are all also considered unrealistic and ill-fitted to the needs of both employers and employees. Some businesses feel labour law may be viewed negatively by employees.

In general terms industry representatives feel new employment laws are unsuited to the needs of employees and employers, and there is some evidence businesses are not adopting the new employment contract, which has generally be considered unfit for purpose by both employee and employers across all sectors. There is however consensus that labour laws are needed to protect the rights of employees and employers, and that standardised employment contracts and conditions are preferable to the current situation of multiple and differing approaches to contracting, or often none at all. Respondents were unanimous that if there is to be a standard contract, a specific Hospitality and Tourism employment contract should be developed, with specific clauses that take into account industry specifics such as working hours and seasonal work, and that labour law should reflect these needs.

Training and development

Training and development is seen as necessary to retain staff and improve service quality. However, the fear of losing well-trained staff to competitors is often cited as a reason for a lack of training provision. On-the-job coaching is conducted by almost all businesses, though is rarely structured or evaluated. The majority of training is carried out in the low season.

All tourism businesses consulted carry out some form of staff training. Training structure, definition, routine and method differ greatly between businesses, with larger operations having more established training systems. In-house training is mainly focused on specific tasks required of employees. For hotels, in-house training can include customer service skills, basic food preparation and food and drinks service. Examples of external training include basic hygiene, and health and safety training.

Training for tour operators is delivered primarily by owners, managers, and supervisors, although online learning is also often used, with short e-learning courses available to staff. Annual low season training is structured, with some staff attending training courses held by larger travel companies, visiting tourist destinations and taking part in cross departmental training.

An online survey asked respondents to indicate new skills needed to meet industry growth. As employers recruit new candidates, they seek applicants with a can-do, positive attitude. The skills of 'positive attitude' and 'team working' ranked the highest, whereas 'application of numeracy' and 'entrepreneurship,' ranked the lowest. This likely indicates employers believe skills can be taught on the job, as long as the candidate has the right outlook and attitude.

Focusing on management skills, accommodation providers identify the most important areas as leadership, revenue management, quality management and training skills. Tour operators consider leadership and people management, product development and quality management as the most important skills for managers.

Technical skills related to hygiene and food preparation are viewed as important for hospitality workers. 'Food hygiene,' 'food preparation,' 'health and safety' are rated the most highly by respondents.

Standards

The desire to improve standards to meet the needs of international customers was highlighted by all industry stakeholders. Specific attention is needed to improve staff language skills (especially but not restricted to English) and provide a better value for money experience through improved standards of customer service and improved facilities.

The lack of a national set of industry service standards to help businesses assess their performance is needed, combined with national qualifications and widely available training. Better linkages between all hospitality and tourism businesses at local and national level in each location to share ideas and experiences and promote best practices is lacking.

Handicrafts

Tourists travel to experience different cultures and landscapes and in so doing regularly purchase handicrafts, representing memories of connecting with those cultures. Handicrafts contribute to visitor satisfaction and their purchase creates valuable employment. GOM's 2014 census data suggests the "Crafts and Related Trade Workers" sector, employs over 2.4 million workers (11.7% of the working population). While a clear definition of what sub-sectors are embraced under this definition is lacking, HRDSAP "Research Strand 4b: A Review of MSMEs in the Handicraft and Souvenir Sector" states:

- The sector annually contributes between 3 and 4 US\$ billion per year to the national economy;
- 20-25% of the handicraft sector is linked to international tourism and this figure is a growing year by year; and,
- Without tourism-related markets, many traditional handicraft skills could fade or disappear.

Bagan's lacquerware industry is estimated to be worth upwards of US\$9 million per year, and this figure is likely to be substantially higher once retail margins and tourist guide commissions are considered. Visitor markets therefore provide opportunities to create sustainable livelihoods, preserve traditions that comprise the fabric of cultural heritage and lift households out of poverty.

As with the HRDSAP business surveys above, Research Strand 4b assessed seven HR issues as they relate to handicrafts and their supply chains, namely: recruitment; staff retention; succession planning; labour policies and contractual issues; career development; coaching and mentoring; and, training and development. Box 7 highlights key issues raised in the study that need to be addressed, and provide a basis for the key objectives and actions of the HRDSAP. Some issues identified relate specifically to increasing the demand for handicrafts, which in turn would help address fundamental issues related to low incomes and a scarcity of skilled labour. The research also concluded that a lack of support directed to these areas will likely further undermine the handicraft sector, which in some instances will continue to decrease in size and perhaps disappear altogether.

Box 7: Key HR Issues Affecting the Handicraft Sector

- Low artisan incomes.
- Scarcity of skilled artisans (especially designers).
- Lack of formal vocational training in technical artisanal skills and general business skills.
- Lack of new generation enthusiasm and interest for craft trades.
- Lack of adequate health care and social security for artisans.
- High tour guide commissions (20–35%) undermine artisan salaries and the sector generally.
- Need for common handicraft markets in primary tourist areas.
- Export market assistance is needed for small quantity exporting by tourists.

MTF and Sector Associations

The MTF is an amalgamation of the 11 associations shown in Box 8. Consideration is currently being given to affiliating an additional member, the Myanmar Arts and Crafts Association. The stated mission of the MTF is to

- Promote Myanmar as a tourism destination;
- Help the process of sustainable tourism development;
- Welcome and assist investors; and
- Develop human resources for tourism-related industries.

HRDSAP Research Strand 5 was undertaken to assess HR issues related to the MTF and the associations, and identify opportunities to:

- Strengthen their management and administration;
- Encourage cooperation and collaboration between the associations and the MTF; and
- Support their growth by expanding membership numbers and the services provided to members.

Key issues identified through the research are set out in Box 9, in the form of a strengths, weaknesses, opportunities and threats analysis.

Box 8: Members of the Myanmar Tourism Federation

- Myanmar Hoteliers Association
- Union of Myanmar Travel Association
- Myanmar Tourism Marketing
- Myanmar Hospitality Professionals Association
- Myanmar Restaurants Association
- Myanmar Tourism Transportation Association
- Myanmar Souvenir Entrepreneurs Association
- Domestic Pilgrimage & Tour Operators Association
- Myanmar Tourist Health Care and General Services Association
- Myanmar Tourist Guides Association
- MTHRDA Myanmar Tourism Human Resources Development Association

In brief, barriers to the delivery of services that would provide industry knowledge, skills and expertise to the members of the MTF and the Associations include a lack of administrative staff, systems and budgets, as well as effective communication with members (and potential members) of the associations. Inputs and actions are needed to address these fundamental areas and provide the basis for the key objectives and actions set out in this strategy.

Box 9: MTF and Associations Strengths/Weaknesses/Opportunities/Threats Analysis (issues highlighted are generalisations and do not apply to every association)

Strengths

- Enthusiasm of members to contribute positively to the tourism industry
- Broad skill-base within the associations – members manage successful tourism businesses
- Collective knowledge of members
- Local market knowledge

Weaknesses

- Lack of financial resources and administrative staff
- Lack of membership fees, or refusal to pay due to lack of services
- Communication with members is often via Facebook only and Yangon-centric
- Lack of skills and experience to manage successful associations
- Lack of international industry experience and exposure

Opportunities

- To harness associations' combined business acumen and market reach to deliver substantial value to the tourism industry
- To grow the range of member services
- To unify association structures and systems (such as accounting, database management, customer relationship management)

Threats

- Poor coordination between associations
- Stagnation – individuals and associations fail to change and adapt
- Static or no membership growth
- Lack of leadership, clear goals and objectives causes splinter groups



VISION FOR MYANMAR TOURISM HUMAN RESOURCE DEVELOPMENT

Put simply, Myanmar's HRDSAP vision for tourism human resource development is to promote a gracious and dignified service-oriented culture.

GOM recognises that as a people-oriented industry, quality tourism is about the attitude, skill sets and personal attributes of owners, managers and staff at all business levels, across the public and private sectors. Countries as well as businesses that excel in tourism, that achieve the highest levels of visitor-spend and repeat business, are those recognised for quality standards of service. Hence, this Strategy focuses on establishing HR-related policies, systems and structures to deliver quality products and services throughout the Myanmar tourism industry.

The necessity to focus upon quality service hinges on a number of industry truths that are well-aligned with Myanmar's courteous and warm cultural identity. Firstly, quality service delivers a charming and wholesome image of a country, its government, businesses and people. Gentility and politeness cost nothing, and generate goodwill and smiles. Secondly, it makes sound economic sense to deliver good service. Warm and courteous employees are more likely to generate additional purchases in restaurants and bars, and more hotel or tour bookings through word-of-mouth sales. Thirdly, from a management perspective, satisfied customers are generally easier to manage than customers who are disappointed or frustrated with their service experience, which creates happier working environments and reduces the likelihood of high staff turnover. Lastly, the majority of visitors that are part of the increasingly sophisticated and competitive global tourism industry expect and look forward to good service. In other words, for Myanmar to excel in international tourism, receive the volume of high-spending visitors and the level of international respect it deserves, the country must focus upon and celebrate quality service standards.

Earlier sections of this Strategy have alluded to the multifaceted systems and structures that should be established to consistently deliver quality service standards. While some elements of this structure are in place in Myanmar, many are not. Box 10 provides a checklist and overview of the direction in which human resource management needs to develop in the coming years. With these attributes in mind, the following sections outline the specific aims of the three strategic pillars that make up this Strategy.

While GOM is keen to see the public and private sectors in every state and region make significant strides with tourism HRD interventions and good practice, it recognises that current market trends will to some extent dictate where larger investments are made to create models of good practices. In line with current trends presented in Figures 1 and 2, GOM identifies the following states and regions as first and second tier priorities for capital intensive tourism HRD programmes, such as tourism centres of education and training.²² Included in the first tier are the destinations of Tachileik, Myawaddy and Kawthaung as the first over-land border points open for the e-visa system. While first and second priority states and regions are identified, GOM advocates tourism HRD interventions in the governance, education and training, and industry programme arenas in all states and regions.

First Priority:

Yangon, Mandalay, Shan, Tanintharyi, Mon, Bago, Nay Pyi Taw, Rakhine, Kayin.

Second Priority:

Ayeyawady, Kayah, Chin, Kachin, Magway, Sagaing.

²² Wherever possible and practicable, rather than focus upon new building projects, GOM will invest in utilising the existing building stock and convert these for training and education purposes.

Box 10: Accepted Good Practice in Human Resource Management and Development

Core Components	Internationally Accepted Good Practice
Developing service quality standards	<ul style="list-style-type: none"> Measures to improve service quality standards in all businesses and organisations. Measures to improve service / working standards of staff at all levels within tourism businesses and organisations. Inclusion of an integrated approach to training in service quality standards across all work programmes.
Ensuring a proactive and engaged role for government ministries and departments	<ul style="list-style-type: none"> Integrate the role of all public sector agencies in support of tourism HRD at business, state/regional and national levels. Ensure clear links between industry skills needs and educational programmes in tourism and hospitality. Develop a national skills and qualifications framework for tourism and hospitality aligned to ASEAN standards.
Organisation management	<ul style="list-style-type: none"> Ensure staff and managers (HR) are recognised as a fundamental business asset. View people as an asset, not a cost. Build long-term relationships with all employees in the business / organisation.
Resources and staffing	<ul style="list-style-type: none"> Measures to improve staff retention. Clearly defined recruitment and selection criteria. Quality and consistency of induction training. Measures to support a positive image of a country.
Training and development	<ul style="list-style-type: none"> Cultivate attitudes to learning as an essential aspect of work. Facilitate wider access to learning. Facilitate team and collective working. Expand and support work-based and on-site learning. Support learning through performance reviews. Develop managers as on-site teachers. Demonstrate learning links to business results. Promote continuous learning. Improve management skills, particularly team leading, people management, performance management, financial management, and customer relations management. Facilitate access to further education. Strengthen industry and academia linkages. Create incentives for educators. Improve dialogue with education providers.
Compensation and remuneration	<ul style="list-style-type: none"> Express recognition for work well done. Reward high achievers. Design monetary rewards. Link staff rewards to business/organisational performance: identify clear linkages between skills, job performance, business results, and individual/team remuneration.
Benefits	<ul style="list-style-type: none"> Build career paths and support staff to follow them. Maximise worker responsibility. Facilitate access to education and training. Structure working hours in flexible blocks. Provide special leave for key life/family events.
Employee services	<ul style="list-style-type: none"> Actively empower staff and encourage participation in decision-making. Build a flexible and open organisation. Project and maintain the workplace as a happy environment. Promote and implement equality of opportunities. Attend to the particular needs of ethnic and non-national workers.

Employee relations	<ul style="list-style-type: none"> • Develop excellent team-leadership and front-line management. • Consult with staff and seek their views. • Pay attention to staff communication. • Consider management style, and practice what is appropriate. • Maintain an open-door policy with accessible managers and supervisors. • Involve staff in work and job design.
Personnel administration and records	<ul style="list-style-type: none"> • Design, maintain and update employee handbooks. • Design and operate grievance procedures. • Identify and comply with employer obligations and employment legislation. • Keep “personnel administration” for record keeping purposes, and devolve “people management” to the front line.
Health, safety and welfare	<ul style="list-style-type: none"> • Evaluate work design and rostering, and ensure people are at work only when they are needed at work. • Promote a work-life balance. • Manage stress. • Design and disseminate an employee welfare programme.

Tourism Public Sector: HRD Stated Aims

GOM is committed to a whole-of-government approach to tourism planning and management at every level. GOM is working to progressively strengthen tourism sector governance through the application of policies, strategies and actions to raise industry awareness and deliver education, training, advisory and mentoring opportunities to staff at all levels of government, especially to those participating on tourism-related committees, working-groups and boards.

The focus will be on up-skilling individuals and departments that play key roles in tourism policy formulation, planning and management decision-making, performance measurement and in the delivery of technical services to support responsible tourism planning and management. This will involve targeted interventions at the union and state/regional government levels to build capacity and support in the four key ministries of Hotels and Tourism, Natural Resources and Environmental Conservation, Culture and Religious Affairs; and, Home Affairs. GOM also recognises that a broader range of ministries and departments are critical to the whole of government approach especially education, labour, immigration, agriculture, commerce and ethnic affairs, and will also target HR support and professional development in these areas.

The overall aim of the HRDSAP component for the public sector is to strengthen human resource management and build the capacity of civil servants to enable the government to provide a more sustainable and responsible tourism industry by delivering:

- industry lessons and technical knowledge to senior decision-makers at the highest-level of government to support coordinated policy-making and strategic tourism planning;
- technical knowledge, training and education to government staff based in Nay Pyi Taw to enhance their personal and professional skills to enable them to better contribute to the GOM’s tourism policies and plans, including performance measurement;
- industry lessons and technical knowledge to senior decision-makers at the highest level of state/regional government to initiate coordinated tourism planning, the creation of state/regional tourism councils and strategic tourism planning; and
- technical knowledge, training and education to government staff in tourism destinations to establish destination management organisations, and support the development of community involvement in tourism (also known as community-based tourism).

MOHT will play a critical role in each element of the above process, and GOM will work to ensure MOHT has sufficient staff educated and trained to meet these aims, and the key objectives articulated below.

As part of its good governance responsibilities, GOM will also work to raise public and civil society awareness of the importance of the tourism industry to the national economy, and the steps that individuals can take to promote responsible tourism development.

Tourism Education and Training: HRD Stated Aims

GOM is committed to urgently expand the provision of, and access to, all forms of tourism-related education and training. GOM will work to ensure policies and strategies translate into public and private sector investments in education and training facilities and equipment. Actions will be targeted towards priority states and regions. The highest priority will also be extended to establishing competency-based frameworks to ensure learning and qualifications are aligned with ASEAN tourism standards and the MRA-TP. The development and promotion of the Myanmar National Qualifications Framework will enable and facilitate career progression, and ensure access to life-long learning synergises with a coherent qualifications pyramid.

GOM recognises Myanmar faces a series of challenges to upgrade current tourism education and training provision to meet ASEAN standards. In the first instance focus will be on ensuring nationally agreed upon curricula and tourism education programmes are in place in all education and training institutions. As part of this process, NSSA and its Hotel and Tourism Sectoral Committee led by MOHT will be engaged in the design and approval of competency, assessment and accreditation standards. NSSA will also oversee the design and implementation of Recognition of Prior Learning criteria, which aims to give credit to experienced professionals able to demonstrate competence in the workplace.

Similarly, emphasis will be given to equipping teachers and trainers with pedagogical skill-sets to deliver interactive learning, as well as appropriate industry and technical knowledge to ensure students graduate with relevant skills demanded by tourism employers. Close cooperation and collaboration between tourism enterprises and education and training providers will also be emphasised. Instances of such partnerships will find expression on a number of levels from the working group to oversee the implementation of the HRDSAP, down to education committees advising tourism schools, internships, and entrepreneurs and industry supervisors providing hands on teaching in classrooms around the country.

GOM understands the special role that tourist guides play in the tourism industry and their relevance to product and destination development at sites around the country. Priority will be given to developing tourist guide competency standards, training trainers and assessors in the competency standards, and piloting training in priority destinations around the country. Opportunities for private sector delivery of GOM approved tourist guide training will be pursued.

To prepare future generations of tourism and hospitality employees, GOM recognises the importance of including tourism-related subjects and learning outcomes in primary and secondary classrooms. While GOM encourages teachers to look for opportunities to bring tourism into the classroom, especially in the priority states and regions identified in the HRDSAP, initial focus will be to include tourism as a subject in the government technical high school curriculum. GOM is also committed to developing future leaders for the tourism sector by supporting the implementation of a redesigned Bachelor of Arts in Tourism and Hospitality Management at three universities and a new Master of Arts in Tourism and Hospitality Management.

Tourism Private Sector: HRD Stated Aims

GOM will work with the private sector, including MTF and its sector associations, foreign direct investment hotels and other independent or non-MTF member businesses together with its development partners to promote widespread take-up of HR management systems and processes by businesses throughout the industry. GOM welcomes development partner interventions such as ILO's Start and Improve Your Own Business programme, and ITC and UKAID's Business Innovation Facility's tour operator training, and would like to see these and similar programmes replicated in other destinations around the country. Focusing upon the hospitality sector, GOM recognises the current shortage of trained hospitality workers will likely continue for the short- to medium-term, and that part of the solution to this shortage is to provide access to learning for as many workers, in as many businesses as possible.

Opportunities will be taken to engage with tourism businesses of all sizes and types – including hoteliers, restaurateurs, transport providers (land, sea and air) tour and travel operators to promote good practice across all HR-related disciplines, including recruitment, staff retention, career development, succession planning, training and development, and raising service standards. To achieve these aims, the priority will be to upgrade standards of supervisory and operational management, with a special focus upon HRD and training. GOM will work hand in hand with MTF, sector associations and the private sector overall to promote industry learning and skills development, and ensure they are viewed as core concerns of all tourism businesses.

GOM will extend special attention to labour laws to ensure they embrace the sector specific needs of tourism and hospitality employees and businesses, including through the planned process to consolidate many existing laws into a single Labour Code. Through this effort a positive and flexible labour relations environment for the sector will be created, that provides protection for freelance workers (for example, tourist guides), seasonal and contractual employees.

GOM acknowledges the substantial economic value of the country’s handicraft sector, the employment it generates and the special linkages between the handicraft and the domestic and international tourism sectors. Tourism provides opportunities to significantly expand handicraft sales and employment opportunities, and retain valuable elements of the nation’s cultural heritage that in some instances might otherwise be lost. The HRDSAP aims to breathe new life into the handicraft sector by promoting, through destination-level interventions, vocational training and government approved apprenticeship schemes based upon diligent assessments of market demand and labour conditions.

GOM recognises the essential and valuable roles of private sector associations in terms of: (i) representing collective member interests to government, suppliers, customers and consumers; (ii) providing services to members; (iii) providing communication channels between industry and consumers; and (iv) strengthening industry practices to promote product and service quality. GOM fully supports the growth and professionalization of industry associations and believes interventions to ensure all tourism-related associations are legally registered and operating with full and proper administrative, financial and membership systems to be of the highest priority. GOM considers such actions to be a prerequisite to the efficient and effective delivery of HR services to expand the industry knowledge and skill sets of their members, which must be viewed as an industry priority.



STRATEGIC PROGRAMMES

Table 8 summarises the three strategic programmes and key objectives of the HRDSAP, which are set out as Tourism Public Sector, Tourism Education and Training, and Tourism Private Sector pillars. While each strategic programme and accompanying objectives are positioned as distinct areas of intervention, there are often sector-linkages between them as well as the actions and activities to be carried forward under them. Ensuring good employment and labour relations, and developing community-based tourism, for example, involve both public and private sector action. Implementation of the key objectives set out below therefore requires strong cooperation and collaboration across the public and private sectors. MOHT the MTF and sector associations will play lead roles in driving these work programmes forward, and will look to support from private operators, civil society and Myanmar's development partners in a number of areas.

Table 8: Myanmar Tourism HRDSAP: Strategic Programmes and Key Objectives

STRATEGIC PROGRAMMES		
1. Public Sector	2. Education and Training	3. Private Sector
1.1 Establish a Working Group to Oversee the Implementation of the HRDSAP	2.1 Upgrade Tourism Curricula, Learning Resources and Materials at Every Level	3.1 Develop a Comprehensive Set of Basic and Advanced Training Packages for the Hospitality Sector
1.2 Strengthen the Human Resources and Institutional Capacity of the MOHT	2.2 Strengthen Tourism Training Standards and Accreditation Systems	3.2 Develop a Comprehensive Set of Basic and Advanced Training Packages for tour operators
1.3 Provide Training in Industry Data Collection Techniques and Processes	2.3 Improve the Quantity & Quality of Training and Teaching staff	3.3 Ensure Good Employment Legislation and Labour Relations
1.4 Design and Deliver Tourism Training for Civil Servants Working in Tourism-related Activities	2.4 Strengthen Industry and Academia Linkages	3.4 Strengthen Staff Recruitment and Retention, Reduce Out-migration of Trainees and Encourage Migrant Worker Return
1.5 Provide Training to Support the Development of State / Regional Tourism Councils	2.5 Establish Tourism Training Centres in Key States and Regions	3.4 Address HR challenges affecting the handicraft sector
1.6 Provide Training to Enable the Development of DMOs and Community Involvement in Tourism	2.6 Increase Access to Training and Utilise Educational Technology to Maximise Learning Impact	3.6 Strengthen the Management and Member Services of the MTF and Affiliated Associations
1.7 Promote Public Awareness of the Tourism Industry Including the ASEAN MRA-TP	2.7 Strengthen Tourist Guide Training Systems and Standards	3.7 Support the Development of Management and Leadership of Tourism Businesses

Aligned with the MTMP and its cross cutting themes, the HRDSAP is inclusive in its outlook, it acknowledges the fundamental value of gender equality and advocates equal opportunities for women and men from all ethnic nationalities. Similarly, the Strategy recognises the tourism sector provides many employment opportunities for people with disabilities, and that people with disabilities should not experience industry discrimination in any shape or form.

GOM advocates opportunities to increase the participation of people living with disabilities, women and ethnic nationalities in the tourism workforce, destination planning, tourism decision-making and to develop skills to become future tourism leaders. GOM will also ensure equality is reflected and advocated in the content of all training programmes. GOM will engage with its partners to ensure education and training text, tone, photos, case studies and illustrations refrain from gender, ethnic or disability discrimination or stereotyping. Positive promotion of ethnic nationalities, women and people with disabilities engaged in tourism will be showcased through examples, case studies and learning exercises. Toolkits and training programmes will be developed to ensure a conflict sensitive approach to HRD and business development in ethnic areas. The 'Do No Harm' approach currently employed is a good framework to consider. Specific training kits will be developed to encourage gender-awareness, gender

equality, anti-discrimination against ethnic and religious diversity in the work place, and to ensure child-safe tourism. As far as possible these training kits and materials will be referenced and included in all industry training embraced in this HRDSAP.

GOM also advocates support for scholarships and sponsorship programmes to promote tourism-related tertiary education for women, ethnic nationalities and people living with disabilities. The development of management, internship and mentorship training programmes that support places for women, ethnic groups and people with disabilities is encouraged. Potential partners for such interventions include Myanmar's development partners, tourism-related corporations, multi-national corporations and hotel chains, hospitality training schools and the tourism-related trade associations.

The following sections describe the priority issues to be addressed by each strategic programme, while Appendix 1 sets out further details and a five-year action plan to implement each key objective. The Appendix includes stakeholders to be engaged, with the lead agency highlighted in bold, indicative costs and performance indicators. Key objectives and actions that are prioritised for implementation are highlighted with distinctive shading.

Given the scale the tourism HR challenge, together with the substantial benefits and rewards ahead in terms of income, employment and lifting households from poverty, GOM welcomes support from Myanmar's development partners in implementing the HRDSAP. Actions in Appendix 1 that are prioritised for technical assistance and other forms of development partner support are defined with a (') symbol in the Lead Agency column. The symbol appears alongside many actions where implementation activities are required in a number of states and regions.

Strategic Programme 1: Tourism Public Sector

The diverse, pervasive and at times unwieldy qualities of the tourism industry present many sector challenges. Awareness raising, education, training, advisory and mentoring interventions are needed to enhance and support on-going government work programmes at multiple layers of government, from the centre to the periphery and to differing degrees, across different ministries. Priority actions are targeted towards the MOHT, Ministry of Natural Resources and Environmental Conservation (MONREC), Ministry of Culture and Religious Affairs (MOCRA) and Ministry of Home Affairs (MOHA) at the centre and branch office levels, especially to actions that strengthen destination planning and management at the state/regional level.

Key Objective 1.1: Establish a Working Group to Oversee the Implementation of the HRDSAP

The HRDSAP contains a series of wide-ranging objectives and work-plans, some of which are relatively straightforward to implement while others are more complex. Given the tourism industry is likely the fastest growing sector of Myanmar's economy and offers great potential for income and employment generation, special consideration needs to be given to carrying this strategy forward to implementation. The MOHT will form a working group chaired by the Union Minister for Hotels and Tourism to provide policy guidance, create an enabling environment for implementation of the Strategy's more complex and ambitious objectives and actions, and help coordinate development partner support for tourism HRD. The group will be composed of key ministries including Education, Labour, Immigration and Population, and Planning and Finance. Given their special relationship with the tourism sector, and their wide-ranging tourism-related HR needs, the Ministries of Natural Resources and Environmental Conservation, Culture and Religious Affairs, and Home Affairs will also be included in the working group. Private sector representation will include MTF, UMTA, MTGA, Myanmar Hoteliers Association (MHA), Myanmar Restaurant Association (MRA), Myanmar Hospitality Professionals Association (MHPA) and Myanmar Tourism Human Resource Development Association (MTHRDA), together with representatives from development partners that are playing substantive roles central to the implementation of the HRDSAP.

Key Objective 1.2: Strengthen the Human Resources and Institutional Capacity of the MOHT

Four immediate training needs have been identified to build human resources and the institutional capacity of the MOHT including staff in state/regional and branch offices, namely: tourism technical knowledge, ICT, English language and management and leadership. HRDSAP Research Strand 8 includes a detailed two-year work-plan setting out recommendations, actions and timelines to deliver training in each of these areas, a number of which require support from development partners. As MOHT takes on more staff, organisational development reviews will be adopted on a regular basis to strengthen strategic workforce planning, recruitment and selection, the induction/orientation of new staff, people and performance management and succession planning.

Key Objective 1.3: Provide Training in Industry Data Collection Techniques and Processes

As noted above and in the MTMP, the collection and analysis a variety of visitor and industry employment data underpin responsible tourism planning and management. Put another way, you cannot manage what you cannot measure and data is currently lacking in a number of areas to facilitate responsible tourism. This issue affects the public and private sectors, as well as development partners looking to support the sector. A review of current visitor and industry employment data collection and presentation practices will be undertaken and compared with established regional and international good practice. The review will include a training needs assessment identifying government departments and personnel that require training and support to collect, process and present industry relevant data.

In addition, an annual series of industry surveys will be established using a variety of investigative and survey methods to measure and assess attitudes and opinions towards industry training and service delivery.

Key Objective 1.4: Design and Deliver Tourism Training for Civil Servants Working in Tourism-related Activities

A number of activities will be initiated to strengthen tourism governance at the centre, state/regional and destination levels.

High-level strategic briefings to Ministries and State/Regional Governments

A small team of industry experts led by MOHT will be formed to deliver half-day briefings to senior government officials and elected members of parliament on key Myanmar tourism policy and planning issues. The team might include foreign as well as local experts, with briefing materials adapted to the needs, interests and requests of specific ministries and state/regional officials including senior officials and elected representatives from Myanmar's ethnic nationalities. The aim of the briefings is to promote industry awareness among senior-most officials at the centre and state/regional levels, identify barriers to integrated tourism planning, and create an enabling environment for coordination and planning across ministries, and between the centre and state/regional levels.

Tourism training needs assessments for key ministries

A small number of ministries and government departments have substantial roles in the tourism sector including MONREC, MOCRA, MOHA (including the Tourist Police Department) and Ethnic Affairs.

There are substantial awareness raising, training and mentoring needs within MONREC, for example, to carry the Myanmar Ecotourism Policy and Management Strategy forward to implementation. That relate to training staff to prepare and implement ecotourism plans for protected areas, undertake tourism-related environmental impact assessments and studies to identify "limits of acceptable change", develop lease agreements for eco-lodges and ecotourism activities in and around protected areas, and raise field-staff awareness on the pros and cons of ecotourism activity.

For MOCRA branch office staff awareness of, and training in, the design of visitor management and interpretation strategies, is a critical need, as is managing the growth of both domestic and international tourism to religious sites.

Similarly, MOHA's General Administration Department staff and officers from the Tourist Police require briefings and training in relation to tourism destination planning, regulation and management, with the latter having substantial language-training needs. Tourism-related training needs assessments will be undertaken with these ministries to map current skill and knowledge areas, identify training priorities, and design and deliver tailor-made training to staff, together with learning resources and materials for use by ministry staff in the execution of their duties.

Tourism industry awareness training

A small team of MOHT staff will be trained and assisted to deliver short 4-5 day "introduction to the tourism industry" awareness-raising courses for technical staff from other government ministries and state/regional officials. The course will consist of briefings profiling: the nature of the tourism industry; types of tourists; types of tourism; positive and negative social, cultural, environmental and economic impacts; responsible tourism; gender issues; supply chains; destination planning and management; an overview of the MTMP, MRTP, Myanmar Community Involvement in Tourism Policy, Myanmar Ecotourism Policy and Management Strategy, and HRDSAP; and case studies of destination management issues in Myanmar. The course will have a number of target audiences including centre, state/regional and branch office ministry staff from MOHT, MONREC, MOCRA, MOHA, MOE, Ministry of Industry (MOI), Ministry of Planning and Finance (MOPF), Ministry of Commerce (MOC), Ministry of Border Affairs (MOBA). Courses will involve discussion of planning and management issues, and encourage networking, cooperation and dialogue across government ministries.

Key Objective 1.5: Provide Training to Support the Development of State / Regional Tourism Councils

Train representatives of state/regional Tourism Councils in strategic tourism planning

Aligned to the MTMP and building upon high-level briefings delivered to state/regional governments through Key Objective 1.4, MOHT will respond to requests to assist state/region governments motivated to form state/regional tourism councils. Assistance will take the form of periodic public and private sector workshops that maybe supported by development partners to: assess the tourism assets and resources of state/regional government; undertake skill and knowledge audits to support tourism planning; discuss approaches to tourism planning; and, evaluate any assistance that maybe required to formulate state/regional strategies and work-plans to advance tourism planning.

Tourism destination planning awareness training

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

Key Objective 1.6: Provide Training to Enable the Development of DMOs and Community Involvement in Tourism

Toolkits for establishing DMOs

A toolkit will be prepared in English and Myanmar to guide destination governments and private sector actors through initial steps and processes to establish and operationalise a DMO. The toolkit will contain a variety of materials including power-points and worksheets to enable public and private sector stakeholders to work with each other and set in place steps to strengthen tourism planning and management processes. This will include materials on: assessing the need for a DMO; establishing and formalising a DMO; DMO governance, operation and finance issues; destination planning, management and investment tools and processes; destination marketing and research methods; and, 'further reading' resources including summary case studies and sources of additional information.²³ The toolkit will be prepared by MOHT, with MOHT staff trained to guide state/regional and destination governments through the materials therein.

Community Involvement in Tourism

As part of its effort to diversify Myanmar's tourism product, open up new areas for tourism and deliver benefits and opportunities to poorer households and communities, MOHT will actively promote community involvement in tourism. Support will be given to training trainers in CIT/CBT and the development of toolkits to support these processes will be included in the DMO toolkits cited above, as well as training packages developed for tour operators as part of key objective 3.2 below. A number of CIT projects have been established in Myanmar and will be actively promoted by MOHT and other stakeholders. Case studies of these projects will be developed with lessons widely circulated through the media, and included in the education and training programmes listed in the strategic programmes of this HRDSAP.

Key Objective 1.7: Promote Public Awareness of the Tourism Industry Including the ASEAN MRA-TP

A spread of integrated activities will be designed and deployed to promote national awareness of the tourism industry and, in particular, the ASEAN-MRA-TP, the ASEAN Tourism Curriculum together with systems and processes designed to facilitate their implementation. These activities will engage, and be managed by, public and private sector agencies, including MOHT, MOE, NSSA, the MTF and its affiliated associations, and utilise a variety of media formats to reach the broadest possible audiences.

Strategic Programme 2: Tourism Education and Training

The tourism sector is poised to provide hundreds of thousands of jobs for women and men across the country, and especially those living in and around established and emerging destinations. In most instances, initial education and training delivered by public and private sector training providers will provide the initial skill sets for entry-level competence and employment in the sector. This will however only be a starting point and GOM will work to structure, design and deliver a variety of short and longer education and vocational training programmes to cater to

²³ See for example, <https://www.gstcouncil.org>

the needs of current and prospective employees at all industry levels and entry points. Career progression, with clear pathways of learning, will be an essential feature of the education and training framework, as will the alignment to the Common ASEAN Tourism Curriculum, and the Mutual Recognition Agreement on Tourism Professionals.

Key Objective 2.1: Upgrade Tourism Curricula, Learning Resources and Materials at Every Level

GOM recognises innovation is needed in the design of new and upgraded curricula, and in supporting learning resources across a range of teaching subjects through each level of learning. Innovation is needed in terms of content and delivery, and this will be supported by competency standards aligned with the Common ASEAN Tourism Curriculum (linked to key objective 2.2). The ASEAN toolboxes will be utilised for curriculum development and teaching, with materials adapted to the Myanmar context, and ready for use by tourism education providers. Priority actions will include the design of materials that support student centred and interactive learning. Support for Recognition of Prior Learning is an additional priority and will require development of mechanisms and materials for testing and certification of additional tourism standards, in line with the work begun with the NSSA.

In terms of including tourism as a subject in school curricula, as a first opportunity GOM will include tourism in the technical curriculum of the government Technical High Schools in its forthcoming review. While the process to reform primary and secondary education in Myanmar is lengthy and complex, GOM will ensure due consideration is given to including tourism at every level of education from schools, to colleges and universities. As processes to develop new curricula and supporting learning materials, as well as train teachers in the delivery of these materials are lengthy, attention will be directed towards including tourism-related subject matter in classroom teaching. This might include, for example, a review of tourism impacts on culture in social studies, the role of Myanmar heritage in attracting tourists in Myanmar studies, or the consequences of tourism on the environment in geography lessons. Attention will be drawn to these and other opportunities through media campaigns, and also by destination governments keen to promote an understanding of the sector among future generations, and the job opportunities the sector provides. Special consideration to this approach will be given to schools in and around the established destinations of Bagan, Chaungtha, Inle, Kyaitiyo, Ngapali, Ngwesaung, Mandalay and Yangon, as well as emerging destinations such as Dawei, Hsipaw, Kawthaung, Kyaington, Myeik, Tachileik and Sittwe.

Key Objective 2.2: Strengthen Tourism Training Standards and Accreditation Systems

GOM recognises that tourism training standards and accreditation systems are needed to ensure both quality and consistency of education and training for tourism. GOM will revise the current and develop new tourism training standards to support the development of education and training for the tourism workforce. As part of the overall reform of the education and training system in Myanmar, GOM will establish accreditation systems for both higher education and TVET to assure quality and consistency of the qualifications issued by education providers and the relevant government bodies.

Key Objective 2.3: Improve the Quantity and Quality of Training and Teaching Staff

The pool of tourism teachers in Myanmar is largely concentrated in Yangon. Key challenges are to improve the quality and quantity of teachers and trainers, as well as their geographical coverage. To address these challenges and meet the fast-growing demand for industry workers, GOM will engage with a range of development partners to create a nationwide and sector-wide (public and private) cadre of skilled and knowledgeable master trainers, capable of building the next generation of tourism lecturers and trainers competent in both technical areas and up-to-date pedagogy training skills.

Key Objective 2.4: Strengthen Industry and Academia Linkages

Recognising the immediacy of education and training needs, and for students and trainees to graduate with relevant, hands-on skill-sets, emphasis will be directed towards developing partnerships between training providers and tourism businesses on a number of levels. At a policy and planning level, for example, industry and academia will be strongly represented on the HRDSAP-Committee. Dialogue at this level will focus upon policy and strategic interventions to encourage partnership and engagement at all levels of education and training. This includes: the provision of infrastructure and training schools (see Key Objective 2.5); the development of competency standards, curriculum, resources and assessment strategies; the inclusion of internships in learning programmes; and, the involvement of industry practitioners in lecturing and mentoring academic staff, students and trainees.

Key Objective 2.5: Establish Tourism Training Centres in Key States and Regions

Recognising the high-interest of all state/regional governments in the tourism sector, GOM will initiate a long-term programme of infrastructure and capital investment. Wherever possible emphasis will be given to upgrading existing facilities rather than invest in new building projects; the aim being to expand the number of schools and centres of learning that deliver effective practical training throughout the country. At the outset, emphasis will be directed towards the first priority states and regions identified in the HR vision. In addition to expanding public sector provision, emphasis will be directed towards public-private partnerships and creating incentives for private

investment in training facilities. Learning from models such as the Hilton Vocational Training Centre in Nay Pyi Taw and the Inthar Heritage House facility in Inle, GOM will encourage private investment in a variety of education and training facilities including tourism-schools, training kitchens and model restaurants.

Key Objective 2.6: Increase Access to Training and Utilise Educational Technology in Training to Maximise Learning Impact

GOM understands the use of technology to support access to education will be an important element in building capacity over the long-term, and a variety of strategies will be employed to increase access to tourism-related education. Online access to learning materials is needed by institutes and students, especially on mobile devices. HRDSAP research strands also revealed high business and employee interest to use online learning for training purposes in the accommodation and tour operator sectors. Increased Internet speeds, greater familiarity with mobile phones and computers and the Internet offer training solutions that didn't exist even one year ago, allowing people in even the most remote areas to improve their skills.

Flexible learning materials delivered via distance learning, to be studied over a period of time, also provide opportunities for study that align with work/ family lives, especially women with family care duties. Opportunities will therefore be sought for learning materials to be distributed in traditional media (sound and video) in remote and underprivileged areas where the cost of mobile data usage remains costly. The development of learning materials in the English, Myanmar and ethnic languages will serve to widen access to tourism education, especially for pre-TVET and TVET curricula.

Consistent with wider MOE policy, GOM will roll out a programme to provide accommodation, scholarships and stipends to support access to training for disadvantaged groups. MOHT will also strengthen and expand its mobile training programme. Questions remain however as to how to make courses and materials widely available to target audiences, and to what extent different materials should be free of charge or commercially available. A number of activities will be formed to carry this agenda forward including convening meetings and workshops with training providers and industry representatives to review and present options and possibilities, as well as prepare training courses and materials for delivery through Internet channels.

Key Objective 2.7: Strengthen Tourist Guide Training Systems and Standards

MOHT, NSSA, MTGA and UMTA will work together to strengthen the design and delivery of tourist guide training, and apply competency standards to the sector. In the first instance, attention will be directed towards defining tourist guide competency levels and standards, designing and piloting training modules, and training trainers in the delivery of the modules. With competency standards in place, attention will turn to expanding the number of trainers, and to creating and equipping centres of excellence for tourist guide training in Yangon and key states and regions to ensure widespread access to training.

Linked to the above process, UMTA and MTGA will work with sports clubs, special interest groups, ASEAN tourist guide associations and Myanmar's development partners to identify pathways to design and deliver niche-market tourist guide training modules in line with the NSSA competency standards (for example, scuba-diving, trekking, mountaineering, bird-watching).

Strategic Programme 3: Tourism Private Sector

The following key objectives provide multiple pathways to engage an array of tourism businesses in the vision to promote a high quality service-oriented culture. Their successful implementation will centre upon close public private and sector dialogue at all programme levels, especially between MOHT, and the key MTF affiliated associations. At the outset this process is also being strongly supported by a number of development partner projects, from which lessons will be learned and models of best practice applied in every state and region.²⁴ Ultimately, however, the successful delivery of these key objectives and their actions relies upon individual businesses to seize upon the opportunities available, and work to instil good HR management and development practices within their operations. The greater the collective effort and engagement, the greater the outcome for individual businesses, destinations, sector workers and the wider industry, as well as visitors to the country.

Key Objective 3.1: Develop a Comprehensive Set of Basic and Advanced Training Packages for the Hospitality Sector

There is a huge need and interest in hospitality training among hotels and restaurants. To meet this need training packages will be designed to be progressive and specific to business needs. Utilising ASEAN Tourism Curricula training materials developed through the HRDSAP Strategic Programme 2, the following methods will be deployed to build tourism-related human capital.

²⁴ Including, for example, Swisscontact, LuxDev, ILO, UKAID, ITC, GIZ-IAI

Training of trainers

Focus will be given to training members of local and national hospitality and tourism associations, and individual managers in hospitality and tourism businesses. Training will be intense and short-term at numerous sites around the country.

In-house training of staff

Having trained trainers, in-house training will be organised with assistance from industry associations at the destination-level to cascade knowledge and skill sets to the workforce. Pilot training will also be supported by development partners over the medium-term to build a stock of reliable experienced trainers and ensure familiarity of good practice. Training will include subjects such as personal development (timekeeping, hygiene, problem solving, dealing with difficult situations, effective communication, decision-making, labour rights, career planning) and food and drink service skills (hygiene, health and safety, product knowledge, presentation skills, standards of service to meet international expectations).

Key Objective 3.2: Develop a Comprehensive Set of Basic and Advanced Training Packages for Tour Operators

The majority of Myanmar's tour operators are small family run businesses with a variety of industry training needs. A series of training packages will be designed and deployed to meet business needs, imparting basic and advanced knowledge on the fundamentals of tourism business operations, product design, packaging, pricing and marketing. As with key objectives 3.1 emphasis will be given to training trainers to facilitate the widest possible distribution of training events. Attention will also be directed towards the design and deployment of online learning programmes.

Key Objective 3.3: Ensure Good Employment Legislation and Labour Relations

Recognising the need for labour policies, laws, rules and regulations that meet the needs of both tourism businesses and employees, GOM will consult with the industry to understand industry-specific requirements and work towards the adoption of industry specific clauses and criteria within the new labour laws, including standard contracts, if retained. Support will be provided to businesses and employees through sector associations to ensure the adoption of good working practices including contracts for all staff, regardless of business size.

As 'salary and remuneration' issues are related to high staff turnover, training on fair remuneration for each staff level, and guidance on the creation of benefit packages, will be provided to businesses through activities listed under Key Objective 3.1. Over the medium term this will include recommendations for standardised pay and salary levels to help address problems linked to inflated salaries brought about by competition for a small pool of skilled managers.

Key Objective 3.4: Strengthen Staff Recruitment and Retention, Reduce Out-migration of Trainees and Encourage Migrant Worker Return

The HRDSAP-Committee will initiate feasibility studies to establish standardised recruitment systems to provide information and linkages between employees and potential employers. Options include: (i) online recruitment systems developed and linked to industry association websites and, in time, the ASEAN Tourism Professionals Registration System, together with recruitment focal points located in association offices; (ii) online templates developed for skills-based job descriptions, with linkages to the websites of public and private sector training providers; (iii) industry adoption of standardised low-skill level training to nationally recognised standards, with proper use of ASEAN compliant industry certificates for trainees; and (iv) the development of a series of promotional videos positioning hospitality and tourism as a solid and expanding career choice (embracing women, ethnic minorities and for people with disabilities).

To support higher retention, industry associations will compile and disseminate to their members' retention strategies for tourism businesses, which help improve business working environments and staff benefits. The latter will include options such as the adoption of standardised industry contracts, longer-term incentive packages, access to training, tips on management style and creating supportive and nurturing environments that provide opportunities for personal growth and career development. Activities in this area will also be carried forward through interventions such as those described under Key Objectives 3.1 and 3.2.

The HRDSAP Working Group will oversee research to establish the extent, geographical spread and dynamics of Myanmar's tourism hospitality professionals working abroad, and formulate policies and strategies to reduce this phenomenon and where practicable, encourage migrant worker return.

Key Objective 3.5: Address HR Challenges Affecting the Handicraft Sector

While human resource issues affecting the handicrafts sector are complex, root causes of these challenges are low artisan incomes and a scarcity of artisan workers, especially designers. To address these root causes there

is a need to: identify a GOM ministry and department to lead the revitalisation of Myanmar's handicraft sector;²⁵ strengthen vocational training; introduce government supported apprenticeship schemes; review benefits and incentives available to sector workers; and, develop a national marketing strategy to increase handicraft sales through prominent promotion of quality branded merchandise. From an HR perspective, focus will be directed towards steps and processes to:

- Bring together a community of stakeholders to collectively support and promote the sector;
- Strengthen vocational training for handicraft producers; and
- Establish a government approved and supported apprenticeship scheme for handicraft trainees.

Key Objective 3.6: Strengthen the Management and Member Services of the MTF and Affiliated Associations

As Myanmar's tourism economy continues to expand, the role and opportunities for the MTF and its affiliated associations to support this growth through increased member services should also expand. To take advantage of this situation interventions are needed to (i) create a stronger foundation for the associations in terms of their administrative and financial systems, membership databases and business planning; (ii) canvass members to verify and prioritise interest and investment in member services; and (iii) deliver member services based upon good practice industry models from across the region and beyond. The Strategy's Action Plan sets out a series of interventions to help achieve these objectives.

Key Objective 3.7: Support the Development of Management and Leadership of Tourism Businesses

Leadership and management training interventions will be targeted towards managers and owners including components such as recruitment, evaluation, succession planning, coaching and mentoring, business planning, quality assurance and legal matters such as contracting and employment law. This structured intervention will also include planning sessions with businesses leaders to determine the best local pathways to deliver:

External training (and or online-learning) including language skills, product development and marketing skills, specific vocational skills dependent on business needs, such as housekeeping, front office, security, kitchen, maintenance etc., as well as management and supervisory skills training sessions for employees deemed suitable to move to senior positions, and child protection training (for example using the material from The Code); and

Refresher training for all staff that can be conducted throughout the year and carried out in as little as one hour prior to shift commencement. Specific training would be determined by individual business needs and provided from a toolbox of simple training available to all businesses.



²⁵ Responsibility for handicrafts is split across various ministries and departments including: Small Scale Industry Department formerly of the Ministry of Cooperatives; Department of Trade Promotion, Ministry of Commerce; and, Fine Arts Department, Ministry of Culture and Religious Affairs.

IMPLEMENTATION AND MONITORING

Implementation

The HRDSAP concludes that action is needed on multiple fronts to strengthen tourism-related HR management and development. Needs are also urgent as industry growth is rapid and the demand for new employees with diverse skill sets will likely continue for another two decades or more. Given the diversity of needs across the public sector, education and training, and private sector programmes, the HRDSAP Working Group (HRDSAP-WG) formed to oversee the design and content of the Strategy will continue to meet. As set out in Table 9, the Working Group will consist of core members from key ministries, the MTF member associations and development partners, as well as additional members that may join meetings depending upon their specific focus and agenda. Additional members are denoted with an “*”. Although NSSA is not mentioned in the Table, working group membership includes representation from NSSA and its Hotel and Tourism Sectoral committee (through MOHT, MOLIP, MOE and MTHRDA).

Table 9: HRDSAP Working Group Members – Implementation

Government Sector	Private Sector	Development Partners
Ministry of Hotels & Tourism	Myanmar Tourism Federation	LuxDev
Ministry of Education	Union of Myanmar Travel Association	Swisscontact
Ministry of Labour, Immigration & Population	Myanmar Hospitality Professionals Association	International Labour Organization
Ministry of Planning & Finance	Myanmar Tourism Human Resource Development Association	Myanmar Centre for Responsible Business
Ministry of Natural Resources & Environmental Conservation*	Myanmar Hotel Association	World Bank Group
Ministry of Home Affairs*	Myanmar Tourist Guide Association	Asian Development Bank
Ministry of Culture & Religious Affairs*	Myanmar Restaurant Association	GIZ
Ministry of Ethnic Affairs*	Myanmar Arts & Crafts Association	Other development partners*
Foreign Direct Investment Hotels – General Managers Group		

The HRDSAP-WG, chaired by the Union Minister for Hotels and Tourism, will meet at least twice per year, and is mandated to:

- Review progress, identify priority actions, define work-plans and oversee the overall implementation of the HRDSAP;
- Create an enabling environment for the implementation of the HRDSAP, and ensure efficient and effective coordination and cooperation across government ministries and departments, and between the government, private sector and their development partners;
- Influence and direct tourism education and training policy and practices to enhance capability at all industry levels through quality assurance, facilitation and support for training and development interventions;
- Identify areas where greater government and/or development partner support is needed to deliver essential change;
- Promote training networks and form focus groups as may be necessary to advance key agendas and work programmes of the HRDSAP, including for example;
- Defining indicators and sourcing relevant data to measure tourism-related employment growth;
- identifying professional career paths for key occupations and ensuring the provision of clear, flexible and relevant courses and programmes leading to professional qualifications;
- Reviewing and evaluating the impact of the full range of tourism education and training support services provided at national, regional and local levels with a view to upgrading quality and promoting greater access to training and education (especially for women, ethnic nationalities and people with disabilities); and
- Raising public awareness as to the importance of the tourism sector to the nation’s economy including the substantial income and employment opportunities the sector provides, and positioning the industry as an attractive career choice.

The Director of the MOHT's Training and Education Department will act as the Secretariat to the Working Group. Given the MOHT is designated as the lead agency for the implementation of multiple activities listed in the HRDSAP's five-year work-plan, the Union Minister will designate MOHT staff and departments with the responsibilities to implement specific work-programmes. Supporting agencies and their roles will also be clearly defined during WG meetings.

The general roles and responsibilities of other organisations included in the working group are as follows.

The Ministry of Education will play a central role in upgrading and mainstreaming tourism and hospitality education and training in public and private sector education provision across the country. MOE will:

- Inform the WG on all matters related to the progress and development of the primary and secondary curricula, and work with the WG to determine steps and processes to include tourism subjects in these curricula starting with the government technical high school curricula;
- Engage with the WG to advise on opportunities, steps and processes to ensure tourism degree programmes are made available in more states and regions;
- Advise the WG on steps and processes to support and encourage greater private sector provision of tourism education and training;
- Play a key role in ensuring teachers and lecturers of tourism and hospitality are equipped with the skill sets and experience to deliver competency-based learning;
- Strengthen and support the growth and quality of tourism-related TVET education and training; and
- Engage with the WG to assess wider education and training needs related to the growth of tourism-related supply chains and of indirect and induced employment opportunities arising in the market place, and make recommendations to MOE to meet these training and education needs.

The Ministry of Labour, Immigration and Population has a number of important roles and responsibilities with regard to the growth of the tourism sector and the promotion of decent jobs within the sector. MOLIP will engage with the HRDSAP-WG to:

- Ensure Myanmar's labour and employment laws take into consideration the special needs of the tourism industry (both employers and employees), and support the growth of the sector as a major pillar of the economy;
- Support the growth and quality of tourism-related TVET education and training;
- Advise and assist where necessary to help NSSA define, deploy and regulate competency and accreditation systems and processes;
- Play a key role in generating data to measure the growth of tourism-related employment; and,
- Advise on issues related to the opening of Myanmar's borders to visitors via the e-visa system.
- The Ministry of Planning and Finance is responsible for economic policy and strategy, coordinating development across all ministries, and budget allocations to enable ministries and state / regional governments to fulfil their mandate. MOPF will engage with the HRDSAP-WG to:
- Understand the scope of tourism-related employment across different sub-sectors throughout the country, and help determine how these sub-sectors will expand in the future;
- Play a key role in generating data to measure the growth of tourism-related income and employment;
- Formulate policies to maximise, to the greatest possible extent, domestic employment in tourism-related sectors and ensure this growth reduces poverty and provides opportunities for women and ethnic nationals; and
- Determine budget needs to support the implementation of the HRDSAP and its priority work-programmes and actions.

The Ministry of Natural Resources and Environmental Conservation has responsibility for tourism-related environmental impact assessments, overseeing the development of ecotourism activity in and around protected areas as well as other forest and natural environments, and plays a critical role in implementing the Myanmar Ecotourism Policy and Management Strategy. As such, MONREC has substantial tourism-related HR development needs. MONREC will engage with the HRDSAP-WG to:

- set out a clear prioritised work-programme identifying the HR training and development needs of managers and staff within the ministry, its key departments and branch offices;
- identify opportunities, steps and processes to carry the work-programme forward to implementation;
- ensure teaching and learning programmes that support MONREC's tourism-related agenda are included in design and delivery of tourism education and training opportunities taken up by public and private sector education and training providers; and
- advise on the content of strategies and specific interventions to raise public-awareness of the importance of the tourism sector.

The Ministry of Home Affairs has responsibility for the Tourism Police and General Administration Department (GAD), which both have critical roles in the growth and development of Myanmar's tourism economy. In addition, MOHA is responsible for regulating which areas of the country are open to international tourists. As such, MOHA has a range of tourism-related HR development needs. MOHA will engage with the HRDSAP-WG to:

- set out a clear prioritised work-programme identifying the HR training and development needs of managers and staff within the ministry and its key departments and branch offices; and
- identify opportunities, steps and processes to carry the work-programme forward to implementation.

The Ministry of Culture and Religious Affairs has responsibility for the positioning and promotion of Myanmar's tangible and intangible cultural heritage as a fundamentally important component of the Country's tourism product: a wealth of Myanmar's cultural heritage assets (including cultural and religious sites, festivals, museums and handicrafts) are tourist attractions. Hence, MOCRA has a range of tourism-related HR development needs. MOCRA will engage with the HRDSAP-WG to:

- set out a clear prioritised work-programme identifying the HR training and development needs of managers and staff within the ministry, its key departments and branch offices; and
- identify opportunities, steps and processes to carry the work-programme forward to implementation.

The Ministry of Ethnic Affairs is the new ministry responsible for promoting the rights and interests of Myanmar's ethnic nationalities. GOM recognises many ethnic nationalities have a special interest in the tourism sector, and that conflict-sensitive tourism can be used as a vehicle for peace and to support national reconciliation. Given this special situation, MOEA managers and staff have a range of tourism-related HR development needs. MOEA will engage with the HRDSAP-WG to:

- set out a clear prioritised work-programme identifying the HR training and development needs of leaders and key figures within ethnic national groups, as well as managers and staff within the ministry, its key departments and branch offices; and,
- identify opportunities, steps and processes to carry the work-programme forward to implementation.

The Myanmar Tourism Federation and sector associations will play a series of roles in the implementation of the HRDSAP. As made clear throughout the Strategy, close coordination between the public and private sectors to, for example: ensure education and training programmes are aligned with industry needs; upskill owners, managers and supervisors and ensure HR tools, systems and processes are embedded in industry practices; and, innovate in the delivery of training and make learning resources widely available through the Internet and other media-based technologies. The MTF and sector associations will liaise with their membership, and engage with the HRDSAP-WG to create an enabling environment for the implementation of each of the key objectives and actions set out in the HRDSAP. Through these processes the MTF and sector associations will ensure the HR needs of each specific sub-sector (hotels, tour operators, restaurants, tourist guides, training providers and handicraft producers) are diligently attended to.

Myanmar's development partners play a highly valued and essential role in supporting tourism HR development, education and training. GOM welcomes their involvement and encourages new and continued interventions in support of this agenda. Development partners provide a range of technical and financial assistance to carry priority work programmes forward to implementation. Partners that are making substantial and strategic interventions to support the tourism HR agenda will be invited and included as core members of the HRDSAP-WG. GOM will constantly review the development partners included in the WG, and may invite others to join as appropriate. Additional partners making valuable contributions through specific targeted interventions may also be invited to join specific meetings or focus groups as appropriate.

Monitoring

MOHT will take the lead in monitoring the implementation of the HRDSAP. In addition, minutes and brief reports from HRDSAP-WG meetings will provide an on-going record of the implementation status of priority programmes against the performance indicators identified in the Strategy's work-plan. After the first three-years of implementation LuxDev's MYA/001 will support MOHT with an in-depth review of the HRDSAP to ensure the continuing relevance of the implementation framework and the priority projects. The review process is important as the actual timelines for many activities will inevitably differ from those laid out in Appendix I.

Budget Requirements

The HRDSAP's three strategic programmes contain 21 key objectives under which 50 sets of actions are grouped. Cost estimates for all actions total US\$17.46 million (Table 10). Costs allocated to activities all activities in Appendix 1 are broad estimates. 32 of the 50 actions are identified as priority actions requiring US\$12.47 million. An additional US\$30-40 million is allocated to a high-priority refurbishment and infrastructure programme to establish tourism training centres in key states and regions. Moreover, while it is noted that it is not possible to embrace government budgets and spending in the HRDSAP, GOM is committed to reviewing and considering the key objectives and actions herein when allocating annual budgets to tourism-related work programmes at the national and state / regional levels. Additional investments to those cited in the work-plan will also be made by GOM to finance equipment costs for education and training facilities, together with staff salaries.

Table 10: Indicative Cost Estimates of the Tourism HRDSAP

Strategic Programme	Cost Estimates Projects (\$ millions)	All Cost Priority Projects (\$ million)
Tourism Public sector	5.68	5.18
Tourism Education and Training sector (refurbishment and infrastructure programme)	8.11 (30.00-40.00)	5.41 (30-40.00)
Tourism Private Sector	3.57	1.88
Total (excluding refurbishment and infrastructure programme)	17.46	12.47



APPENDIX 1

MYANMAR TOURISM HUMAN RESOURCE DEVELOPMENT STRATEGY AND ACTION PLAN

FIVE YEAR ACTION PLAN 2016-2020

Priority actions are highlighted with through the following shading

Actions requiring technical assistance or development partner support are defined with a (') symbol in the Lead Agency column

Strategic Programme 1: Tourism Public Sector

Key Objectives and Activities	Time-frame					Lead Agencies	Cost (US\$)	Performance Indicators
	2016	2017	2018	2019	2020			
Key Objective 1.1: Establish a Working Group to Oversee the Implementation of the HRDSAP								
1.1.1 Prepare Working Group mandate and operational processes: appoint government ministries, and representatives from the private sector and development partners; agree roles and responsibilities; agree HRDSAP priorities and work-plans; convene six-monthly meetings to review and coordinate work-plans.	x	x	x	x	x	MOHT, MOE, MOLIP, MOPF, MOCRA, MONREC, MOHA, MTF, MHA, UMTA, MTGA, MRA, MHPA, MTHRDA, DPs (')	50,000	HRDSAP-WG established; minutes and reports from WG.
Key Objective 1.2: Strengthen the Human Resources and Institutional Capacity of the MOHT								
1.2.1 Establish an MOHT focal point and small working group with responsibility to carry HRDSAP Research Strand 8 forward to implementation: approve content and recommendations of Strand 8; identify priority activities, processes and timelines for implementation; engage development partners to seek implementation support as maybe necessary; progressively implement activities.	x	x	x	x	x	MOHT, including branch offices	1,500,000	Focal point appointed; small working group established; training programmes delivered.
Key Objective 1.3: Provide Training in Industry Data Collection Techniques and Processes								
1.3.1 Review visitor data collection and presentation methods: assign focal point to oversee the review; develop ToR that assesses industry needs and contrasts with international good practice; identify new systems and procedures required together with roles and responsibilities of government departments and associated training needs; design and deliver training and mentoring processes; implement new procedures; monitor and adapt as appropriate.	x	x	x			MOHT, MOPF, MOLIP, MTF, MOHA, CSO (')	250,000	Review of data collection and presentation methods produced; training implemented to strengthen systems and procedures; industry relevant data produced annually.

1.3.2 Review tourism-related employment data collection and presentation methods: assign focal point to oversee the review; develop ToR that assesses industry needs and contrasts with international good practice; identify new systems and procedures required together with roles and responsibilities of government departments and associated training needs; design and deliver training and mentoring processes; implement new procedures; monitor and adapt as appropriate.	x	x	x			MOLIP, MOPF, MOHT, CSO	250,000	Review of data collection and presentation methods produced; training implemented to strengthen systems and procedures; industry relevant data produced annually.
1.3.3 Design and deploy a series of annual industry surveys including: (i) a survey of visitors departing from international airports to gauge visitor responses to their stay including views on services quality and value for money of hotels, tour operators, restaurants, tour guides and tourism attractions; (ii) research to assess the views and opinions of tourism businesses as to their level of service, attitudes towards and types of staff training and education provided over the last 12 months; (iii) a survey of trainees who have received tourism-related HRD training to assess the value and relevance of the training; (iv) public opinion surveys in key destinations to assess public views and attitudes towards the tourism industry and the quality of services and attractions provided; and, (v) survey of senior hotel managers in the states/regions to evaluate the value and relevance of training and support delivered to the public and private sectors.	x	x	x	x	x	MOHT, university students, MTF & associations (')	250,000	Reports from annual surveys produced, with results feeding into new policy.
Key Objective 1.4: Design and Deliver Tourism Training for Civil Servants Working in Tourism-related Activities								
1.4.1 Deliver high-level strategic briefings to Ministries and State/Regional Governments: identify a small pool of experts to deliver briefings: appoint focal point to coordinate and identify priority activities; communicate services to target audiences; review and assess essential information to deliver; train team members in delivery as necessary; prepare materials for distribution to participants and translate into Myanmar; deliver high-level briefings on demand.	x	x	x			MOHT, (')	250,000	Focal point appointed; team of industry experts established; high-level briefings delivered.

1.4.2 Undertake tourism training needs assessments for key ministries: discuss tourism-related training needs of key ministries and departments at HRDSAP-WG meeting; identify follow up steps including detailed discussions with department representatives; assess overall scope of training needs; identify areas of specialisms where training is needed; identify industry experts able to undertake training needs assessments; undertake training needs assessments, formulate work-plans and identify funding sources as necessary.		X	X	X		MOHT, MOCRA, MONREC, MOHA (')	250,000	Training needs discussed with key ministries and department heads; work-plan for undertaking needs assessments defined; training needs assessments delivered; work-plans defined.
1.4.3 Design and deliver tourism industry awareness training: identify a small team of MOHT experts to deliver training; review and identify issues and topics to be covered in the training; develop training materials and translate into Myanmar; train team to deliver training; identify and prioritise target audiences for training; deliver training; follow up with target audiences as necessary.	X		X	X		MOHT, MOE, MOLIP, MOPF, MOCRA, MONREC, MOHA, MOEA, state/regional branch offices (')	500,000	Training team established; training materials defined; 40 training delivered.
Key Objective 1.5: Provide Training to Support the Development of State / Regional Tourism Councils								
1.5.1 Train representatives of state/regional tourism councils in tourism planning: prioritise state/regional governments in need of tourism planning assistance; convene regular meetings to discuss tourism planning needs; undertake skill and knowledge audits and identify training and awareness-raising needs; provide guidance on tourism strategy planning; match with development partner assistance where possible.	X		X	X	X	MOHT, state regional governments, (')	500,000	8 State/regional tourism councils established; work-plans of tourism councils defined.
1.5.2 Design and deliver tourism destination planning awareness training: using the same team as for action 1.4.3, identify issues and topics for inclusion in the training; develop training materials and translate into Myanmar; train team to deliver training; identify and prioritise target audiences for training; follow up with target audiences as may be necessary.		X		X	X	MOHT, state/regional branch offices of MOE, MOLIP, MOPF, MOCRA, MONREC, MOHA, MOEA (')	400,000	Training team established; training materials defined; 20 training delivered.
Key Objective 1.6: Provide Training to Enable the Development of DMOs and Community Involvement in Tourism								
1.6.1 Develop toolkits for establishing DMOs: review materials on establishing, managing and developing work-plans for DMOs; develop toolkits and supporting materials; train MOHT staff in the delivery of the toolkits and materials; identify and prioritise target destinations to deploy toolkits; mentor and assist DMOs in the use of the toolkits.		X		X	X	MOHT, selected DMOs (')	1,000,000	Toolkits developed and disseminated; 40 training and mentoring delivered.

1.6.2 Raise awareness of CIT projects: work with project managers to develop case studies of Myanmar's CBT projects, include summary materials in academic courses and MOHT training to government stakeholders, conduct site visits and study tours as appropriate; identify journalists with a high interest in CBT, facilitate their access to CBT projects, conduct briefings, encourage six-monthly media articles providing regular updates on project progress.	X	X	X	X	X	MOHT,	80,000	CBT case studies developed; training materials developed and included in training programmes; media articles produced and disseminated.
1.6.3 Provide training in CIT & CBT: identify individuals from CBT project sites and industry professionals with an interest and skill sets to become CBT trainers; share lessons and case studies of CBT projects from the region and beyond with the trainers, and provide study tours where possible; review lessons learned with trainers; identify inbound tour companies and NGOs/development partners with an interest in CBT products; conduct site visits to identify potential CBT sites and match with outbound tour companies interested to buy into CBT product development; develop business plans for CBT projects and deliver stakeholder training as appropriate.	X	X	X	X	X	MOHT, UMTA, DPs, training providers	150,000	10 CBT trainers trained; possible CBT projects identified and verified by outbound tour operators in source markets; training delivered; 10 new CBT sites developed.
Key Objective 1.7: Promote Civil Society Awareness of the Tourism Industry Including the ASEAN MRA-TP								
1.7.1 Develop a three-year public information strategy: appoint a focal point to lead and manage the strategy which embraces the ASEAN MRA-TP; consult with stakeholders and develop a strategy outline; engage journalists to discuss and refine the strategy; determine film and written media components of the strategy; present strategy to HRDSAP-WG and adjust as necessary; identify budgets for implementation; form a small team to implement the strategy with media representation; implement the strategy.		X	X	X		MOHT, MOI, MOE, MTF & associations	250,000	Strategy developed and approved by HRDSAP-WG; team established to implement the strategy; work-plan implemented.
1.7.2 Establish an annual Tourism HR Awards Programme: appoint an awards organising committee; identify award categories for businesses and individuals; develop selection criteria; widely advertise and promote awards.		X	X	X	X	MTF, MHA, UMTA, MTHRDA, MHPA, MTGA, MRA	Industry-funded	Awards event convened on an annual basis.

Strategic Programme 2: Tourism Education and Training

Key Objectives and Activities	Time-frame					Lead Agencies	Cost (US\$)	Performance Indicators
	2016	2017	2018	2019	2020			
Key Objective 2.1: Upgrade Tourism Curricula, Learning Resources and Materials at Every Level								
2.1.1 Design new and upgraded curricula: review curricula offered by public and private sector training providers; identify priority training programmes and teaching materials to upgrade; review related curricula offered by ASEAN countries aligned with the CATC; review and re-write curricula and training materials; consult with industry and revise as necessary; develop competency standards assuring alignment with CATC; train teachers and trainers in delivery of new materials; deploy training.	X	X	X	X	X	MOE, training providers, MTF, MHA, UMTA, MOHT	500,000	Priority curricula identified and reviewed; training materials developed; teachers trained in delivery; new curricula deployed.
2.1.2 Introduce tourism to the Government Technical High Schools Curriculum: discuss inclusion of tourism in the curriculum at HRDSAP-WG meetings to identify focal points to carry this agenda forward; based upon ASEAN good practice, consult with key academic and industry stakeholders to develop and deliver introductory courses on tourism for the GTHS curriculum; train teachers in the delivery of the course.		X	X	X		MOE, MOHT, M T H R D A , MHPA, (')	300,000	Tourism courses offered in GTHS throughout the country.
2.1.3 Develop recognition of prior learning (RPL) processes and materials: working with the recognition and testing initiatives of the NSSA, develop RPL mechanisms and support materials for the providers and/ or the NSSA to test and certify skilled tourism workers and enable them to gain qualifications in their field.		X	X	X	X	NSSA, MOLIP, MOE, training providers, MTF & associations (')	500,000	Skilled workers gain recognition and certification for existing skills.
2.1.4 Develop a strategy to promote tourism education in the classroom: identify a focal point and key individuals to lead the design of the strategy; review existing curricula across related subjects; identify tourism-related topics and issues to promote in the primary and secondary classrooms; identify teachers interested to support the design of learning resources; develop learning resources to aid teachers in the delivery of the subject matter; identify priority destinations to deliver teaching materials; convene focus group meetings with teachers to discuss teaching materials; pilot teaching materials; review and revise as necessary; promote broader take up of the materials.		X	X	X	X	MOE, MTF, MHA, UMTA, MTMC, MHPA, (')	500,000	Learning resources and teaching aid for use in the primary and secondary classrooms developed; tourism subjects taught in primary and secondary classrooms in selected destinations around the country.

Key Objective 2.2: Strengthen Tourism Training Standards and Accreditation									
2.2.1 Design new and upgraded training standards: review current standards; identify priority occupational areas and develop relevant competency standards assuring alignment with CATC; review related ASEAN standards offered by ASEAN countries; consult with industry and the NSSA and revise as necessary; support development of education and training accreditation systems with MOE and MOLIP; train trainers in training standards and accreditation techniques and processes; deploy standards.			X	X	X	X	MOHT, MOE, MOLIP, NSSA, M T H R D A , MHA, MRA, UMTA, (')	1,000,000	New training standards and accreditation systems designed and deployed; learning resources in use by training providers.
Key Objective 2.3: Improve the Quantity and Quality of Training and Teaching Staff									
2.3.1 Deliver training and education to lecturers of tourism degrees: conduct a knowledge audit and assess language skills of teaching staff; identify knowledge gaps, training and education needs; identify suitable courses and training programmes, from short-course to Masters' Degree programmes; deliver English language instruction as maybe necessary; deliver short-course and register for longer academic training as appropriate.	X		X	X	X	X	MOHT, DPs, MOE, (')	1,000,000	Knowledge audit conducted and updated at regular intervals; 50 teaching staff trained; 25 staff graduated with tourism-related Masters' Degrees.
2.3.2 Deliver training and education to tourism Master Trainers: develop training programmes for Master Trainers across a range of subject areas; recruit candidates for training with proven industry experience; deliver on-going training; mentor trainers in delivery of their training; expand the number of trainers receiving training, with a growing focus upon trainers based in primary and secondary destinations.	X		X	X	X	X	MOHT, DPs, M T H R D A , MHPA, (')	1,000,000	Master Trainers training programmes developed; 20-40 master trainers trained per year.
Key Objective 2.4: Strengthen Industry and Academia Linkages									
2.4.1 Utilise industry speakers in the delivery of tourism degrees: develop a list of industry topics and issues to cover in the delivery of all tourism subjects; identify industry speakers to deliver weekly lectures; work with industry speakers to ensure interactive and quality learning practices and techniques.	X		X	X	X	X	T r a i n i n g Providers, MTF, MHA, U M T A , M T H R D A , MHPA, MTGA, MRA	Industry-funded	Industry topics and speakers identified; industry-led lectures and seminars delivered.
2.4.2 Promote internships in the academic curriculum: review opportunities for the introduction of internships; form an industry liaison committee to identify tourism-businesses ready to accept interns; develop criteria and learning goals and supporting documentation for internships; initiate internships; support NSSA development of an apprenticeship system to include the tourism sector.			X	X	X	X	MOE, training providers, MTF, MHA, UMTA, MOHT	200,000	Industry liaison committees established; internship learning goals and industry placements identified; internships institutionalised.

2.4.3 Promote industry research partnerships: establish industry liaison committees; identify potential research needs of industry; develop partnerships with industry and overseas universities where possible; design and deploy research activities.		X	X	X	X	Training providers, MOHT, MTF & associations, (')	250,000	Industry liaison committees established; research needs prioritised and partnerships established; research reports produced.
Key Objective 2.5: Establish Tourism Training Centres in Key States and Regions								
2.5.1 Initiate a long-term programme of refurbishment and investment in facility development: identify priority locations for centres of learning; identify budgets and funding options including PPPs; upgrade existing centres of learning and provide new centres of learning that deliver effective practical training throughout the country.	X	X	X	X	X	MOPF, MOE, MOHT, MTF & associations, (')	30,000,000 - 40,000,000	Priority locations for training centres identified; training centres upgraded and / or built; training centres operational.
2.5.2 Review the legal framework for private sector training providers and PPPs: establish a focus group to review issues related to private sector tourism education training provision; review models of good practice in private sector and PPPs in tourism education and training provision; draft laws, regulations and guidelines to create an enabling environment to expand private sector and PPP training provision, including incentives and tax-breaks for privately owned tourism and hospitality training schools.		X	X			MOHT, MOE, M T H R D A , MHPA	50,000	Focus group established; reviews of private sector education and training provision published; laws, regulations and guidelines approved creating incentives for private sector education and training.
Key Objective 2.6: Increase Access to Training and Utilise Educational Technology to Maximise Learning Impact								
2.6.1 Develop a strategy for delivery of Internet and media training: identify a focal point to lead the design of the strategy; identify priority training to make available online and through media channels; develop strategy outline including commercial funding considerations; present strategy outline to HRDSAP-WG and include feedback; determine funding / sponsorship partners; develop media packages; design and upload pilot training packages; advertise availability of packages; amend packages according to feedback.			X	X	X	M T H R D A , MOHT, MHA, MRA, UMTA, (')	1,000,000	Internet and media learning strategy developed; training packages available online and through alternative media.
2.6.2 Develop strategies for inclusive practice in tourism education and training: incorporating scholarships, stipends, use of ethnic languages in delivery and materials and provision of accommodation for trainees, as well as strategies to ensure training is accessible and targeted towards a wide range of youth including school drop outs.		X	X	X		MOE, MOPF, MOHT, MTF	1,000,000	Diversity of peoples in Myanmar enabled to access education and training.

Key Objective 2.7: Strengthen Tourist Guide Training Systems and Standards

2.7.1 Design competency standards for tourist guides: develop an occupational profile of the tourist guide sector; review tourist guide competency standards used in ASEAN countries and aligned with ASEAN standards; develop draft competencies for different levels of tourist guide; consult with stakeholders to approve competency standards; develop testing and assessment systems; pilot and revise as necessary; submit standards for NSSA approval.	X					NSSA, MOHT, M O L I P , MTGA, UMTA, MTHRDA, (')	60,000	Tourist guide competency standards approved by NSSA.
2.7.2 Deploy competency standards, review and revise tourist guide training modules and processes: develop a training manual to deploy the competency standards; train trainers in the application of the standards; review and revise tourist guide training modules to align with new competency standards; train trainers to deploy new training modules.	X	X				MOHT, NSSA, MTGA, UMTA, MTHRDA, (')	150,000	Competency standards taken up by training providers; new tourist guide training modules developed.
2.7.3 Develop a detailed plan to expand tourist guide training provision: review current approach to the delivery of tourist guide training against the "Tourist Guide Policy Framework" and recent developments; discuss review among MOHT, MTGA, UMTA, NSSA and MTHRDA; develop detailed work-plan to provide tourist guide training in at least three country-wide locations; implement work-plan.		X	X	X		M O H T , MTGA, UMTA, M T H R D A , NSSA, (')	400,000	Detailed plan to expand tourist guide training developed; all levels of tourist guide training routinely delivered from 3 country-wide training centres.
2.7.4 Train tourist guides for niche markets: conduct survey of UMTA members and wider tour operators to identify niche market needs for tourist guides; prioritise niche markets to train guides; identify special interest groups able to support training module development; review related training modules available in ASEAN and wider region; draft training module; align with competency standards; consult with industry and finalise module; train trainers; deliver training.		X	X	X	X	M O H T , MTGA, UMTA, M T H R D A , NSSA	200,000	Modules for niche-market tourist guides developed and approved by NSSA; trainers trained; 100 tourist guides training in niche market products.

Strategic Programme 3: Tourism Private Sector

Key Objectives and Activities	Time-frame					Lead Agencies	Cost (US\$)	Performance Indicators
	2016	2017	2018	2019	2020			
Key Objective 3.1: Develop a Comprehensive Set of Basic and Advanced Hospitality Training Packages for Hotel and Restaurants								
3.1.1 Deliver training of trainers: develop separate training packages for target audiences from hotels and restaurants utilising ASEAN compliant materials; identify priority destinations for training; develop training schedules; liaise with local stakeholders to identify trainers to be trained; deploy training.	X	X	X			MOHT, DPs, MHA, MRA, MHPA (')	500,000	Training packages developed; 100 trainers trained.
3.1.2 Deliver in-house training: utilising trainers trained, identify target audiences for in-house training in priority destinations; determine training needs and materials; deliver training.	X	X	X	X	X	MOHT, DPs, MHA, MRA, MHPA (')	500,000	80 training delivered to 1,000 trainees.
Key Objective 3.2: Develop a Comprehensive Set of Basic and Advanced Training Packages for Tour Operators								
3.2.1 Design training materials and deploy courses: develop training packages for tour operators utilising ASEAN compliant materials; include materials specific to CBT/CIT developed as part of action 1.6.3; identify priority destinations for training; develop training schedules; liaise with local stakeholders to identify trainers to be trained; train trainers; deploy training.	X	X	X	X	X	DPs, UMTA, MTGA (')	500,000	Training packages developed; 40 trainers trained; 20 training delivered to 500 businesses.
Key Objective 3.3: Ensure Good Employment Legislation and Labour Relations								
3.3.1 Develop tourism-specific clauses and legislation for the Labour Law: continue dialogue between MOLIP technicians and industry representatives to amend and adjustment clauses and legislation as may be needed; discuss proposed law with wider industry stakeholders; make amendments as maybe necessary; design and distribute implementation guidelines.	X	X	X			MOLIP, MOHT, MTF, MHA, UMTA, MTGA, MRA, FDI-representatives.	50,000	Tourism specific clauses to the Labour Law developed and approved by GOM.
Key Objective 3.4: Strengthen Staff Recruitment and Retention, Reduce Out-migration of Trainees and Encourage Migrant Worker Return								
3.4.1 Introduce standardised recruitment systems: undertake a review of industry recruitment systems used in ASEAN and the wider region; present and discuss models with industry associations and HRDSAP-WG; identify a framework to design and introduce a nation-wide recruitment system, including sub-sectors to pilot test the model; identify funding mechanisms and partners; implement pilot projects; modify and expand as required.			X	X	X	MTF, MOLIP, MOHT, MHA, UMTA, MTHRDA, MHPA, (')	100,000	Proposal produced on standardised recruitment systems; standardised recruitment system deployed.

3.4.2 Produce promotional videos and documentary to raise civil society awareness of Myanmar tourism employment options and management issues: develop a proposal to produce short films and a documentary; embrace in wider civil society awareness raising strategy (key objective 1.7); identify public, private and DP funding sources and production budget; produce media.		X	X			MOHT, MTF, MOI, MHA, UMTA (')	150,000	Promotional videos and documentary produced and distributed.
3.4.3 Develop a strategy to reduce out-migration and encourage worker return: undertake base-line research to generate information on size and dynamics of industry personnel working abroad; identify information gaps and costs to industry of current situation; present and discuss issues and findings at HRDSAP-WG meeting; assess options for intervention, intervention costs, and potential outcomes; finalise strategy and actions as appropriate; implement strategy.			X	X	X	MOLIP, MTHRDA, MHA, MOHT, MHPA,	20,000 (to produce strategy, additional costs not yet known)	Strategy to reduce out-migration and encourage worker return produced and approved by industry.
Key Objective 3.5: Address HR Challenges Affecting the Handicraft Sector								
3.5.1 Establish 'stakeholder community groups' to promote the handicraft sector: determine GOM focal ministry and lead officer to manage this activity; translate HRDSAP Research Strand 4B into Myanmar; identify government and industry focal points to form stakeholder groups in key destinations and Nay Pyi Taw; distribute Strand 4B report and convene destination-level meetings to discuss and identify priorities; consolidate outputs and recommendations from destination-level meetings; formulate work-plan to strengthen and support the handicraft sector.	X	X				MOC, MOCRA, MOE, MACA, MSSA	40,000	GOM focal ministry and department lead officer identified; 5 handicraft stakeholder community groups established in key destinations; handicraft sector work-plan produced.
3.5.2 Strengthen vocational training for handicraft artisans: review and document existing vocational training programmes for handicrafts; consult with stakeholder community groups to identify (i) handicraft specialisations to be taught through vocational training programmes, and (ii) locations to establish vocational training programmes; develop syllabi and teaching materials for vocational programmes; schedule timetables for training delivery; align with TVET system; identify trainers and deliver training as appropriate; commence vocational training programmes.		X	X	X	X	MOE, MOC, MOCRA, NSSA, MACA, (')	500,000	Vocational training programmes for handicrafts identified; locations for vocational training identified; vocational training programmes deployed.

3.5.3 Establish government approved and supported apprenticeship schemes: create a formal register of handicraft producers currently offering informal apprenticeships in selected destinations; assess nature and extent of training provided; develop competency standards; consult with stakeholders to approve competency standards; develop testing and assessment systems; pilot and revise as necessary; submit standards for NSSA approval; develop a training manual to deploy the competency standards; train trainers in the application of the standards.		X	X	X	X	MOE, MOC, MOCRA, NSSA, MACA, (')	500,000	Register of handicraft businesses offering apprenticeships established with MOE and MOC; competency standards approved by NSSA; training manuals to deploy standards produced; assessment systems formalised.
Key Objective 3.6: Strengthen the Management and Member Services of the MTF and Affiliated Associations								
3.6.1 Gathering missing information on MTF and associations: determine information gaps from HRDSAP Strand 5 report and develop ToR; gather information as appropriate for each association in relation to registration status and related documentation, existing constitution, vision and mission, audited accounts, budget and finances, EC members backgrounds professional positions and roles within associations, complete member information and potential membership-base for the sub-sector; compile all information confidentially with the associations on suitable software platform.	X	X				MTF and associations, (')	10,000	Accurate information profiling status of MTF and each association documented.
3.6.2 Deliver business planning workshops to all associations: based upon a review of good practice from across the region, design and deliver a series of workshops on managing private sector associations; include materials on change management, corporate governance, financial management, business planning and member services, marketing and communication.	X	X				MTF and associations, (')	50,000	Business planning workshops delivered to association members and secretariats.
3.6.3 Engage business advisors: identify strategic positions to guide innovation and international good practice within the MTF and the associations; develop terms of reference for one or more key positions, seeking 10 years proven business experience in specific roles; engage development partners in discussions and negotiations to engage business advisors to support innovation and international good practice.	X	X	X	X		MTF and associations, (')	80,000 per year	Terms of reference for business advisor developed; business advisor(s) appointed.

3.6.4 Develop an intranet for MTF and associations: review options for developing an intranet template to be modified and adapted for use by each association that delivers an inward-face for member communications and services, and an outward face for industry and client engagement.		X				MTF and associations, (')	30,000	Intranet template designed and operated by at least six associations.
3.6.5 Develop member-service endorsement programmes: review industry good practices and assess options for endorsement programmes that encourage and recognise higher skill sets; identify pilot programme options; design and implement work-plan.		X	X	X		MTF and associations, (')	100,000	Endorsement programmes identified and launched in at least three sectors. English language training delivered to 400 workers each year.
3.6.6 Deliver English language training to members outside Yangon: utilise assets of association members, to design and pilot low-season subsidised intensive language training to a number of association members in key destinations; replicate in additional locations.		X	X	X	X	MTF and associations	Business funded	3 training programmes designed and delivered each year.
Key Objective 3.7: Support the Development of Management and Leadership of Tourism Businesses								
3.7.1 Deliver training to managers and owners: develop HRD training packages for managers and owners of tourism businesses; train trainers in delivery of training packages; work with stakeholders to identify target audiences for training; deliver training and work with managers to cascade training to employees.	X	X	X	X	X	MOHT, MHA, MRA, UMTA (')	200,000	30 training delivered to owner managers; 1,000 employees trained.

APPENDIX 2

REVIEW OF MYANMAR’S TOURISM SECTOR FOOTPRINT

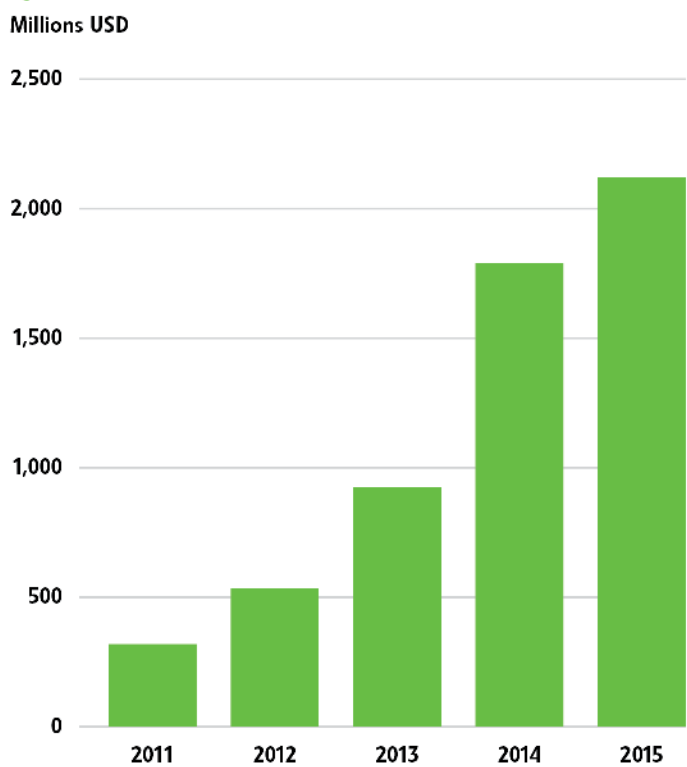
TRENDS

Priority actions are highlighted with through the following shading

Actions requiring technical assistance or development partner support are defined with a (‘) symbol in the Lead Agency column

As depicted in Figure 6, Myanmar’s estimated international tourism receipts increased from \$319 million in 2011 to \$2,122 million in 2015. From an employment perspective GOM has yet to produce industry-wide employment data. WTTC meanwhile estimate that in 2014 travel and tourism in Myanmar directly supported 505,000 jobs (1.8% of total employment), with total employment (direct, indirect and induced) providing 1,134,500 jobs (4% of total employment).²⁶ Evidence suggests roughly 50% of those employed are likely to be women.²⁷

Figure 6: International Tourism Receipts, 2011-2015

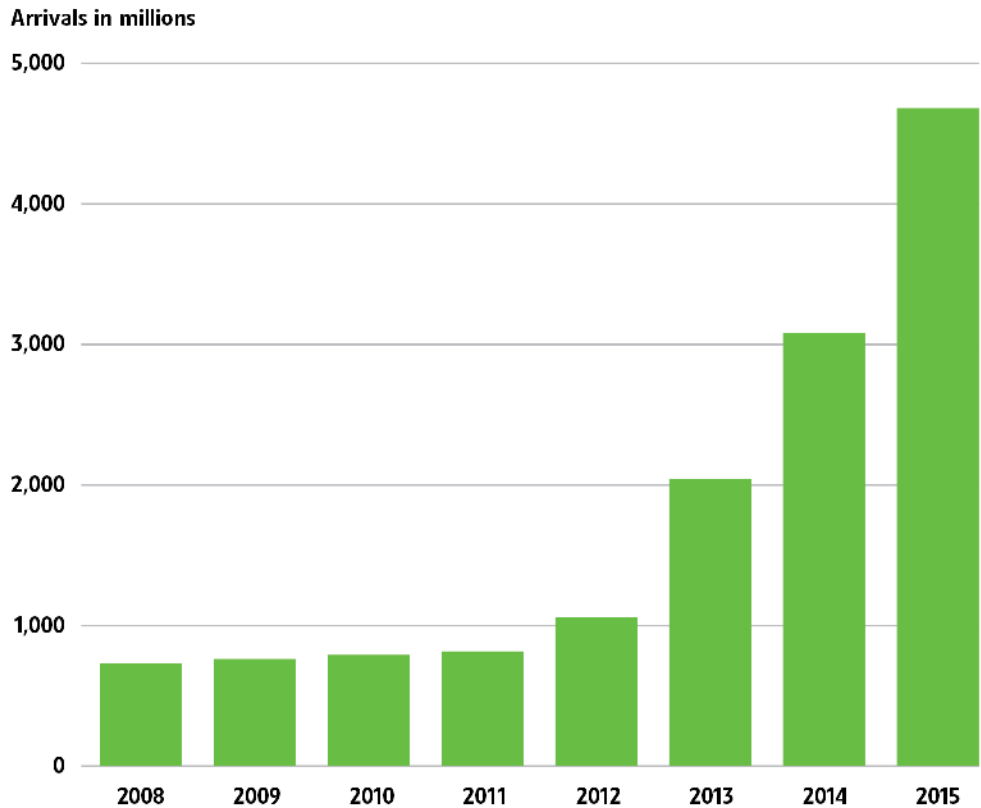


Source: MOHT, 2015.

Figure 7, illustrates the growth in international arrivals to Myanmar increased from 731,230 in 2008, to 4,681,020 in 2015. Entry point data depicted in Table 5 (main report), illustrates that between 2011 and 2015 the majority of arrivals entered by Myanmar’s overland borders, with 72.1% of international visitors entering via a border point. Of these a significant 65.7% entered via the Eastern Region gateways of Tachileik and Mong La followed by 19.9% through the North Eastern Region and 11.5% through the South Eastern Region. It is likely many of these border-entry visitors are day-visitors staying in the country for less than 24 hours. The border entry segment represents the fastest growing arrivals market, with a compound growth rate of over 50%, followed by arrivals entering into Mandalay (38.6%) and Yangon (26.5%). Yangon however ranks as the second most popular gateway, with a record 1.18 million arrivals in 2015. While this figure is expected to climb in 2016 and 2017 with the redevelopment of Yangon’s International airport, it is noted industry operators report a down-turn in tour group market and an increase in independent traveller market. Reasons for this are thought to be the high cost of tour group packages compared to neighbouring countries.

26 Travel and Tourism: economic Impact Myanmar 2015, WTTC, accessed at: <https://www.wttc.org/-/media/files/reports/economic%20im-pact%20research/countries%202015/myanmar2015.pdf>
27 Myanmar Tourism Master Plan 2013-2020

Figure 7: International Visitor Arrivals to Myanmar, 2008-2015



Source: MOHT, 2015

Regarding source markets, of the arrivals into Myanmar’s three international airports in 2015, Thailand and China account for 15.7% and 11.3% respectively. Other countries making up the top 10 source markets include Japan (6.4%), USA (5.1%), the Republic of Korea (4.9%), France (3.6%), Singapore (3.5%), UK (3.5%) and Malaysia (3.1%). Overall Asia makes up 72.1% of the international market arriving in Yangon, followed by Western Europe (16%) and North America (6.4%). The nationalities of arrivals entering via border points has yet to be compiled.

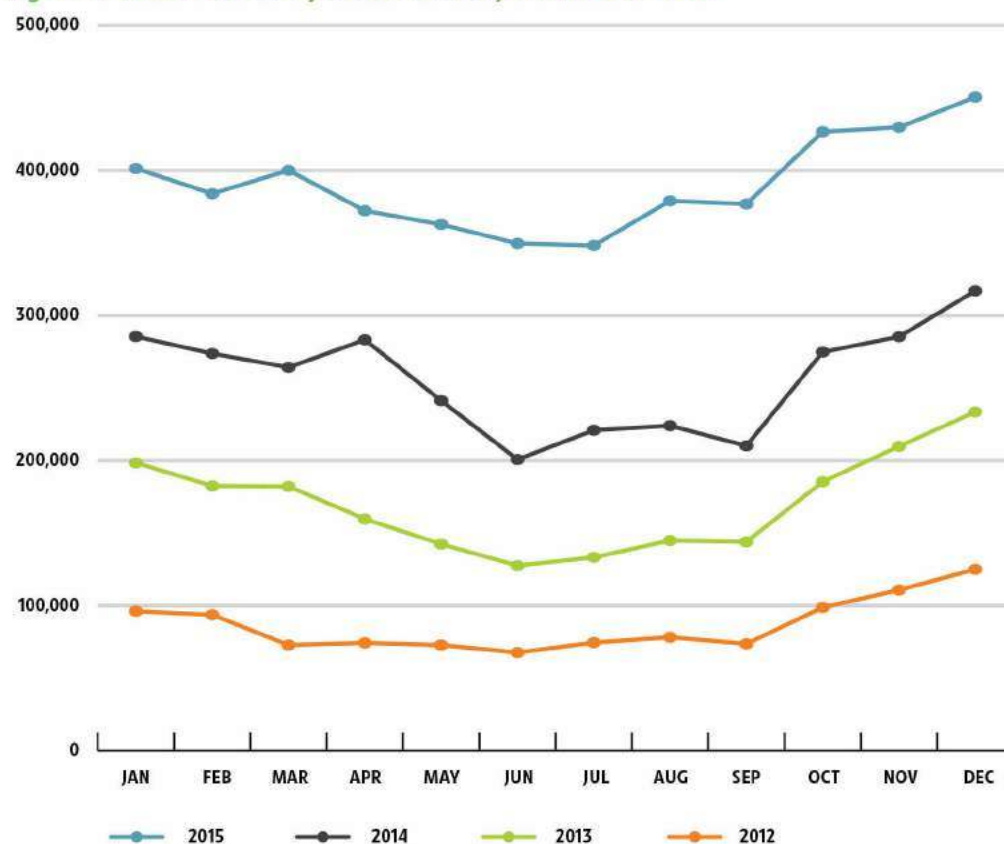
Domestic tourism is also an important market with visitor numbers outnumbering international arrivals, and WTTC estimating a 50:50 split in domestic and foreign tourism spending in 2014. While no government data is available, media reports suggest there were 5 million domestic tourists in 2015, with Taunggyi, Inle Lake, Pindaya, Bagan, Mt Poppa, Alaungdaw Katthapa, Shwesattaw, Kyaikhto and Chaungtha beach being the most popular destinations.²⁸ Domestic tourists have travel patterns and behaviours as well as service requirements that are very different to international markets. Pilgrimage tours to religious sites are an especially important feature of the domestic market, with high visitation presenting destination management problems during festival periods.

MOHT estimates the average length of stay for international visitors has increased from 7 days in 2012 to 9 days in 2015, with the average daily spend per tourist increasing from US\$135 to \$171 over the same period.

Figure 8 contrasts visitor arrivals by month for all entry points between 2012 and 2015, which illustrates the overall growth in arrivals and, with the exception of 2014, relatively minor fluctuations between what are considered to be the high season (October-March) and low season (April-September) months. However, given a significant percentage of border gateway arrivals likely stay in the country less than 24 hours and are not viewed as priority markets, Figure 4 (main report) present visitor arrivals by month at Yangon International Airport over the same years. While the data also depicts a solid but more modest arrivals growth over this period that slowed between 2014 and 2015, a continued pronounced difference between the high and low seasons is evident. This progressively ingrained pattern has growing implications for the tourism labour market, and marketing actions are needed to promote a more balanced spread of arrivals throughout the year.

28 <https://flyinmyanmar.wordpress.com/2014/07/25/domestic-tourism-industry-sees-comeback/>

Figure 8: Visitor Arrivals by Month all Entry Points 2012-2015



Source: MOHT, 2015

Ease of access to visas is a critical variable influencing visitor arrival numbers. E-visas are available for entry into the three international airports and, from September 2016 the three border crossings of Tachileik, Myawaddy and Kawthaung, within five working days by applying to GOM's e-visa website. Visas are issued within a single day at Myanmar Embassies and Consulates General Offices abroad. Visas upon arrival for business travellers and those attending conferences and events are also available with prior arrangement with MOHT or licensed travel agencies registered in Myanmar. GOM is working to streamline visa formalities and will make the e-visa system available for visitors entering via other land borders in the short to medium term.

Analysis

The MTMP included conservative, mid-range and high growth scenarios for 2015 and 2020 for international arrivals, average daily spend, average length of stay and total visitor spend. Comparing these forecasts with actual data for 2015, it is noted:

- international arrivals have exceeded the MTMP high growth forecast for 2015 (4,681,020 actual, against 3,009,663 forecast);
- the average daily spend currently exceeds the MTMP high forecast for 2020 (US\$171 actual, against US\$170 forecast);
- the average length of stay currently exceeds the MTMP forecast for 2020 (9 days actual, against 8 days forecast); and, the total visitor spend was slightly less than the MTMP mid-range forecast for 2015 (US\$ 2.12 actual, against US\$2.19 forecast).
- While the growth in international arrivals has exceeded forecasts, this is likely due to a larger than expected growth of arrivals through border gateways. By way of contrast, border gateway arrivals are not included in MOHT's average daily spend, average length of stay or total visitor spend data. MOHT acknowledges a need to strengthen and improve industry data collection practices, and present wider more detailed data sets aligned with public and private sector investment and development priorities, and would welcome development partner assistance in this regard.

Geographical spread

In 2013 the MTMP noted international tourism was largely confined to a central band of Myanmar with limited visitation in the far north and south. Figure 1 (main report) depicts the status and growth in international arrivals for the 14 states and regions between 2011 and 2015, while Figure 2 (main report) depicts the total number of bed-nights for international arrivals in the states and regions between these years. Table 12 provides the data upon which these

illustrations are based, and includes the compound growth rate between 2013 and 2015 for the total bed-nights for each state/region. While the data is incomplete for some years, it illustrates:

- Yangon, Mandalay, Tanintharyi, Shan and Bago are the top five states/regions in terms of visitor arrivals;
- Yangon, Mandalay, Tanintharyi and Shan received total bed-night counts in excess of 400,000 nights, followed by Mon, Bago, Nay Pyi Taw and Rakhine with totals between 199,000 and 240,000 bed-nights per year;
- Kayah State received the highest compound growth of total bed-nights between 2013 and 2015, with a 152% increase in bed-nights, followed by Sagaing (33.5%), Shan (28.2%), Kachin (26.4%) and Kayin (23.8%) – most of these states/regions were however starting from considerably lower base rates than the top five visited states/regions;
- the data supports the proposition above that the great majority of border gateway arrivals entering Myanmar via its Eastern and North Eastern Region borders do not stay overnight, whereas a greater percentage of border gateway arrivals entering the South Eastern Region do stay overnight. There are however data limitations as arrivals may stay in accommodation where overnight stays by international visitors are unreported.

Table 11: International Visitor Arrivals and bed nights for States and Regions, 2011, 2013, 2015

State / Region	2011		2013		2015		CAGR % Bed-nights 2011-15
	Arrivals	Bed-nights	Arrivals	Bed-nights	Arrivals	Bed-nights	
Ayeyawady	8,509	17,018	14,274	28,548	21,522	43,044	22.8
Bago	-	-	100,018	100,018	196,431	196,431	40.1
Chin	-	-	1,027	1,027	1,997	1,997	39.5
Kachin	3,467	12,135	3,203	11,211	5,119	17,917	26.4
Kayin	-	-	9,344	14,016	14,371	21,557	24
Kayah	-	-	621	932	3,962	5,943	152.6
Mandalay	201,603	604,809	415,883	1,247,649	553,572	1,660,716	15.4
Magway	-	-	12,246	18,369	13,705	20,558	5.8
Mon	-	-	115,087	172,631	15,7842	236,763	17.1
Nay Pyi Taw	-	-	156,946	235,419	142,552	213,828	-4.7
Rakhine	21,863	76,521	40,915	143,203	56,891	199,119	17.9
Sagaing	-	-	6,783	10,175	12,092	18,138	33.5
Shan	63,291	126,582	129,655	259,310	213,082	426,164	28.2
Tanintharyi	127,822	255,644	231,370	462,740	279,114	558,228	9.8
Yangon	362,810	1,088,430	809,100	2,427,300	1,126,779	3,380,337	18

Source: MOHT, 2015

By way of additional comparison, Table 13 depicts the growth in accommodation establishments in key destinations between 2013 and 2015, and compound growth rates between these years. The Table highlights destinations with compound growth rates higher than 20%. Each of these destinations are located in the states/regions highlighted in the above analysis, which to some extent confirms the validity of the data in Table 6 as these are the same states / regions benefiting from significant growth rates in accommodation and room numbers. Collectively, this data illustrates where tourism-related HR interventions should be prioritised, namely in the states / regions and destinations enjoying, (i) the highest number of visitor arrivals and bed-nights, and (ii) the highest visitor and accommodation growth rates.

Table 12: Accommodation Establishments in Selected Locations 2013-2015

Location	2013		2015		CAGR (%)	
	Number	Rooms	Number	Rooms	Number	Rooms
Bagan	77	2,386	78	2,565	0.6	3.7
Bago	14	396	21	588	22.5	21.8
Chaungtha	21	762	22	854	2.3	5.9
Dawei	5	179	9	358	34.2	41.4
Hpa-an	7	180	14	414	41.4	51.7
Kalaw	25	208	35	752	18.3	90.1
Kawthaung	7	451	7	451	0	0
Kyaington	14	442	14	488	0	0
Kyaikhto	11	543	15	643	16.8	8.8
Lashio	12	412	15	510	11.8	11.3
Mandalay	104	4,439	168	6,788	27.1	23.7
Mawlamyine	15	390	24	730	26.5	36.8
Myeik	2	65	11	442	134.5	160.8
Ngapali	22	790	25	863	6.6	4.5
Nay Pyi Taw	50	4,030	64	5,122	13.1	12.7
Ngwesaung	22	1,091	24	1,163	4.4	3.2
Nyaung Shwe	47	1,277	78	2,438	28.8	38.1
Pyi Oo Lwin	42	836	50	1,084	9.1	13.9
Tachileik	23	1013	35	1669	23.4	28.4
Taunggyi	22	646	31	864	18.7	15.6
Thibaw	5	94	12	255	54.9	64.7
Yangon	232	10,175	324	15,424	18.2	23.1
Total (all Myanmar)	923	34,834	1,279	49,946	17.7	19.7

Source: MOHT, 2015

APPENDIX 3

ACTION AID'S COMMUNITY-BASED TOURISM PROJECT, MYAING TOWNSHIP, MAGWAY

Supported and Partnered By Journeys Adventure Travel and Intrepid

In 2011 Action Aid provided flood-relief activities to four villages in Myaing Township. Work stepped-up in November 2012 with the construction of a dam as a key component of a participatory "village-book" planning process to strengthen local farming practices. With early successes underway and a seasonal agricultural calendar in place, Action Aid looked to nearby Bagan and wondered if tourism might be an option for this confident and empowered Township.

In March 2015 a site visit by Journeys led to the formation of a business plan to bring tour-groups of up to 16 people to stay over-night in the village. Journeys were looking for a village-based CBT project to include in their country tour programmes. Journeys were impressed with the village-book's visual seasonal calendar, its working groups, committees and financial management systems already in place as part of the Action Aid and community partnership.

In May 2015 a simple itinerary to explain and interpret the project and village to overnight guests was pieced together. This included a meet and greet village talk, tasting local foods and snacks, a cycling excursion, tree planting and guided village walks. The itinerary was accepted by Journey's outbound partner, Intrepid Travel with a view to sending 1,000 tourists during the first year: 8-10 groups per month in the high-season, 3-5 groups per month in the low-season. With these bookings providing commercial viability, Action Aid and the community were ready to invest in construction and training with growing confidence.

To receive the tour groups Action Aid invested in three accommodation bungalows, each with five twin rooms, together with six toilets and showers, a kitchen, restaurant, tables and chairs and reception area all built with local materials. Construction began in July along with language, guiding, health and hygiene training. Everything was in place to receive the first tour group in January 2016. Once the business-plan was agreed, Action Aid worked with the villagers to deliver 95% of the work-plan, with Journeys in a supporting role engaged in product design work, approving infrastructure designs and training local tour guides to meet standards expected by tourists.

Fast Facts:

- The project builds on four years of Action Aid's empowerment work in the villages, with a spend of around \$2,000 per village per year.
- CBT start-up costs to Action Aid = \$50,000 plus local wages.
- Tour cost per head to Journeys = \$65 including \$10 to community-development fund, which is estimated to generate \$10,000 in the first year. Visitor donations are expected to contribute a further \$5,000-\$10,000 over the first year.
- Village income from one 16 person tour group = \$1,040.*
- Projected village income per high-season month = \$10,400.*
- Projected village income for first year = \$65,000.*
- Action Aid organise two 2-week University groups to the village per year.
- Journeys has a two-year exclusivity agreement with the project.
- Locals earn small extra income from selling snacks, drinks and handicrafts.

* The majority of this income is spent locally, to pay for: food from local markets; community guides; lodge staff; families to cook meals; a music group; and, maintenance of the facilities and local labour costs. Action Aid also charge a management fee to cover staff costs.

APPENDIX 4

ASEAN	Association of South East Asian Nations
ASEAN-MRA-TP	ASEAN Mutual Recognition Agreement on Tourism Professionals
BA	Bachelor of Arts
BIF	Business Innovation Facility
CATC	Common ASEAN Tourism Curriculum
CIT	Community-involvement in Tourism
CBT	Community-based Tourism
DMO	Destination Management Organisation
GOM	Government of Myanmar
HR	Human Resources
HRD	Human Resource Development
HRDSAP	Human Resource Development Strategy and Action Plan
HRDSAP-WG	HRDSAP Working Group
ICT	Internet Communication Technology
ILO	International Labour Organisation
ILO STED	International Labour Organisation – Skills for Trade and Economic Diversification
LuxDev	Luxembourg Development Cooperation Agency
MHA	Myanmar Hoteliers Association
MHPA	Myanmar Hospitality Professionals Association
MOBA	Ministry of Border Affairs
MOC	Ministry of Commerce
MOCRA	Ministry of Culture and Religious Affairs
MOE	Ministry of Education
MOEA	Ministry of Ethnic Affairs
MOHA	Ministry of Home Affairs
MOHT	Ministry of Hotels and Tourism
MOI	Ministry of Industry
MONREC	Ministry of Natural Resources and Environmental Conservation
MOPF	Ministry of Planning and Finance
MRA	Myanmar Restaurant Association
MRA-TP	Mutual Recognition Agreement for Tourism Professionals
M RTP	Myanmar Responsible Tourism Policy
MTF	Myanmar Tourism Federation
MTGA	Myanmar Tourist Guide Association
MTHRDA	Myanmar Tourism Human Resource Development Association
MTMP	Myanmar Tourism Master Plan
NGO	Non-Government Organisation
NSSA	National Skills Standards Authority
TVET	Technical Vocational Education and Training
TTA	Tourism Technical Authority
UMTA	Union of Myanmar Travel Association
WG	Working Group
WTTC	World Travel and Tourism Council

APPENDIX 5

GLOSSARY OF HR TERMS

Affirmative Action	Also : Positive discrimination. Carried out on behalf of women and disadvantaged groups and members of such groups are placed in dominant positions.
Appraisal	See Performance planning.
Autocratic Leadership	Leader determines policy of the organisation, instructs members what to do/make, subjective in approach, aloof and impersonal.
Behavioural Based Interview	An interview technique which focuses on a candidates past experiences, behaviours, knowledge, skills and abilities by asking the candidate to provide specific examples of when they have demonstrated certain behaviours or skills as a means of predicting future behaviour and performance.
Behavioural Competency	The behaviour of the employee which is the subject of measurement and appraisal in terms of whether or not the behaviours shown by an employee are those identified by job analysis/competency profiling as those contributing to team and/or organisational success.
Benchmarking	A technique using quantitative or qualitative data to make comparisons between different organisations or different sections of the organisations
Branding	The process of identifying and differentiating an organization's products, processes or services from another organization by giving it a name, phrase or other mark.
Change Management	The deliberate effort of an organisation to anticipate change and to manage its introduction, implementation, and consequences.
Coaching	A one-to-one process between a manager and subordinate, whereby the former will 'train' the latter. See also Mentoring.
Competency-based pay	Competency based pay is a compensation system that recognises employees for the depth, breadth, and types of skills they obtain and apply in their work. Also known as skill based and knowledge based pay.
Compensation	Compensation for injury to an employee arising out of and in the course of employment that is paid to the worker or dependents by an employer whose strict liability for such compensation is established by statute. Where established by statute, workers' compensation is generally the exclusive remedy for injuries arising from employment, with some exceptions. Workers' compensation statutes commonly include explicit exclusions for injury caused intentionally, by willful misconduct, and by voluntary intoxication from alcohol or illegal drugs.
Competencies	'An underlying characteristic of a person' 'motive, trait, skill, aspect of one's self-image or social role, or a body of knowledge'.
Confidentiality agreement	An agreement restricting an employee from disclosing confidential or proprietary information.
Contract for services	An agreement with an independent contractor.
Contract of service	An employment agreement.
Core competencies	The skills, knowledge and abilities which employees must possess in order to successfully perform job functions which are essential to business operations.
Distance Learning	The process of delivering educational or instructional programmes to locations away from a classroom or site to another location by varying technology such as video or audio-conferencing, computers, web-based applications or other multimedia communications.

Disciplinary procedure	A procedure carried out in the workplace in the event of an employee committing some act contrary to terms of the employment agreement. If the act is regarded as Gross Misconduct this may lead to Summary Dismissal.
Discrimination	The favouring of one group of people to the detriment of others.
Due diligence	A critical component of mergers and acquisitions, it is the process by investigation and evaluation is conducted to examine the details of a particular investment or purchase by obtaining sufficient and accurate information or documents which may influence the outcome of the transaction.
E-commerce	The use of the internet to market and sell goods and services
Emotional Intelligence	Describes the mental ability an individual possess enabling him/her to be sensitive and understanding to the emotions of others as well as being able to manage their own emotions and impulses.
Employee Relations	A broad term used to refer to the general management and planning of activities related to developing, maintaining, and improving employee relationships by communicating with employees, processing grievances/ disputes, etc.
Employee retention	Organisational policies and practices designed to meet the diverse needs of employees, and create an environment that encourages employees to remain employed.
Empowerment	The process of enabling or authorising an individual to think, behave, take action, and control work and decision-making in autonomous ways.
Equity theory	Based on the notion that people are motivated by a desire for fairness, that is, to be treated fairly and will compare their own efforts and the rewards of others in the organisation with a view to judging the fairness of their treatment.
Exit Interview	An interview between a member of staff of the organisation that an employee is leaving to ascertain the reasons for the employee leaving the organisation. Should not be carried out by employee's immediate superior. Used for possible changes.
Extrinsic rewards	Two forms : Money and non-money rewards. Examples : job enrichment, job enlargement, personal and working relationships with colleagues and supervisors and managers.
Fixed Term Employment	An employee and an employer may agree that the employment of the employee will end at the close of a specified date or period or on the occurrence of a specified event or at the conclusion of a specified project. See Section 56 of the Employment Relations Act 2000.
Goal Setting	The process of setting and assigning a set of specific and attainable goals to be met by an individual, group or organisation.
Good faith bargaining	A duty under Section 4 of the Employment Relations Act 2000 to conduct negotiations where two parties meet and confer at reasonable times with open minds and the intention of reaching an agreement.
Grievance	A complaint brought by one party to an employment contract against another party.
HR Audit	A method by which human resources effectiveness can be assessed. Can be carried out internally or HR audit systems are available.
HR information systems	A discrete computerised information system for HR purposes.
HR Development	Concerned with the training and development provided to employees to increase their knowledge, skills, education and ability to help the organisation achieve its goals.

HR Management	The management of human resources within an organization, concerned with activities such as employee benefits, recruitment, selection, training, performance appraisal, motivation and remuneration.
HR planning	The activity of planning human resources usually in connection with the overall strategic planning of the organisation.
Human Capital	The collective knowledge, skills and abilities of an organisation's employees.
Incentive pay	Additional compensation used to motivate and to reward employees for exceeding performance or productivity goals.
Independent contractor	A person who works for him/herself but has a contract for services with another person/organisation.
Individual employment agreement	The legal relationship between an employee and employer.
Induction	The process of introducing a new employee into the organisation.
Industrial relations	The study of theories and practices in the workplace relationship.
Intangible rewards	Non-monetary re-enforcers such as praise given to an employee in recognition of a job well done, or a particular achievement.
International Labour Organisation	An organisation set up by the United Nations to establish, amongst other matters, conventions on practices in the workplace.
Intrinsic reward	A reward given to an employee for achievement of a particular goal, objective or project.
Job analysis	The preparatory stage for writing job descriptions.
Job Description	A written description of a job which includes information regarding the general nature of the work to be performed, specific responsibilities and duties, and the employee characteristics required to perform the job.
Job evaluation	Used for compensation planning purposes, it is the process of comparing a job with other jobs in an organisation to determine an appropriate pay rate for the job.
Key Result areas	Used to establish standards and objectives, key result areas are the chief tasks of a job identified during the job evaluation process.
KPI's	'Knowledge, Skills and Abilities' - Key Performance Indicators. Tasks that have been agreed between an employee and line manager/HR with an expectation that they will be completed satisfactorily in the time agreed or as an ongoing task.
KSAs	Knowledge, skills and abilities – the personal attributes that a person has to have to perform the job requirements.
Labour Market	A geographical or occupational area in which factors of supply and demand interact.
Leadership	The process, by which an individual determines direction, influences a group and directs them toward a specific goal or organisational mission.
Leadership Development	Formal and informal training and professional development programmes designed for all management and executive level employees to assist them in developing the leadership skills and styles required to deal with a variety of situations.
Legislation	Law emanating from Parliament in the form of Acts.
Mentoring	A one-to-one process between an outside trainer and an employee, whereby the former will 'train' the latter. See also Coaching.
Minimum wages	The lowest level of earnings of employees set by Government.
Mission Statement	A statement illustrating who the company is, what the company does, and where the company is headed.
Motivation	The reason(s) why a person works at a particular job and for a particular organisation. Subject to various theories relating to the way they do things.

Motivational theories	An attempt to explain how people are motivated, in the form of work behaviour and performance.
Mutuality of interests	Relating to Performance Management. Both employer and employee have a mutual interest in achieving organisational objectives.
Negotiation	The process of discussion with a view to mutual settlement usually by the means of a conference.
Nepotism	Favouritism shown to relatives by individuals in a position of authority such as CEO's, managers or supervisors.
Observation interview	The process of observing employees while performing their respective jobs or tasks used to collect data regarding specific jobs or tasks.
OSH	Occupational health and safety – the law relating to the health and safety of personnel at work.
Organisational Culture	A pattern that emerges from the interlocking system of the beliefs, values and behavioural expectations of all the members of an organisation.
Organisational theories	The scientific management movement and human relations school were two early organisational theories. Both had impact on the development of human resources management.
Orientation	The introduction of employees to their jobs, co-workers, and the organisation by providing them with information regarding such items as policies, procedures, company history, goals, culture, and work rules. Similar to Induction.
Outplacement	A benefit offered by the employer to displaced employees which may consist of such services as job counselling, training, and job-finding assistance.
Outsourcing	A contractual agreement between an employer and an external third party provider whereby the employer transfers responsibility and management for certain HR, benefit or training related functions or services to the external provider.
Pay	Base pay is the fixed salary or wage which constitutes 'the rate for the job'. It may be the only money remuneration an employee receives.
Peer appraisal	A performance appraisal strategy whereby an employee is reviewed by his/her peers who have sufficient opportunity to examine the individual's job performance.
Performance Management	This is a process of identifying, evaluating and developing the work performance of employees in an organisation, in order that organisational objectives are more effectively achieved and understood by employees.
Performance planning	A total approach to managing people and performance. Involving setting performance aims and expectations for the organisation, departments and individuals employees.
Personal grievance	A complaint brought by one party to an employment contract against another party.
Positive discrimination	See Affirmative action.
Quality management	The process or system of ensuring that a product or service should do what the user needs or wants and has a right to expect. There are five dimensions to quality, design, conformance, availability, safety and field use.
Recruitment	The process of bringing into an organisation personnel who will possess the appropriate education, qualifications, skills and experience for the post offered.
Redundancy	The act of dismissing an employee when that employee is surplus to the requirements of the organisation.
Remuneration	Remuneration includes any payment made under a contract for services.

Right to manage	The 'right' of management to make decisions and to run an organisation without interference from external or internal forces.
Risk management	The use of insurance and other strategies in an effort to minimize an organisation's exposure to liability in the event a loss or injury occurs.
Salary	Is a term used most commonly to describe a base pay which is set at an annual rate and remains unchanged from one pay period to the next, regardless of the number of hours an employee may work.
Stakeholders	The term given to the situation whereby firms have a number of groups, each having their own set of interests, possibly conflicting with each other.
Strategic HRM	The process of aligning human resources more closely to the strategic and operating objectives of the organisation.
Strategic Planning	The process of identifying an organisation's long-term goals and objectives and then determining the best approach for achieving those goals and objectives.
Structural capital	The databases, customer files, manuals, trademarks etc that remain in a firm once employees go home. See Customers capital.
Succession planning	Involving identifying a potential candidate to replace core individual employees either known to be leaving the firm at some point in the future and/or whose sudden departure would pose a risk to the operation of the firm.
Tangible rewards	Rewards which can be physically touched or held (i.e. a gift certificate, gifts in the form of merchandise, or a savings bond).
Total Remuneration	The complete pay package awarded employees on an annual basis, including all forms of money, benefits, services, and in-kind payments.
Training and development	A process dealing primarily with transferring or obtaining knowledge, attitudes and skills needed to carry out a specific activity or task.
Training Needs Analysis	A method of analysing how employee skill deficits can be addressed through current or future training and professional development programmes, as well as determining the types of training/development programmes required, and how to prioritise training/development.
Turnover	Describes changes in the work force resulting from voluntary or involuntary resignations.
Unions	Groups of workers who have formed incorporated associations relating to the type of work that they perform.
Wages	Wages – is a term used most commonly to describe a base pay which is calculated on a hourly, daily or weekly basis. Depending on whether the employment is permanent, temporary or casual, full time or part-time basis, or according to the requirements of the applicable employment agreement. The amount of wages will vary (usually) according to the number of hours the employee works.
Wellness programme	Programmes such as on-site or subsidised fitness centres, health screenings, smoking cessation, weight reduction/management, health awareness and education which target keeping employees healthy therefore lowering costs to the employer associated with absenteeism, lost productivity and increased health insurance claims.
Work-life Balance	Having a measure of control over when, where and how an individual works, leading to their being able to enjoy an optimal quality of life. Work-life balance is achieved when an individual's right to a fulfilled life inside and outside paid work is accepted and respected as the norm, to the mutual benefit of the individual, business and society.

APPENDIX 6

TOURISM EDUCATION AND TRAINING PROVIDERS

Higher Education

Provider	Location	Qualification/programme
MHRI (Myanmar Human Resources Institute)	Yangon	QCF level 4, 5, 6 Diploma in travel, tourism and hospitality management
Enlightenment Institute	Mawlamyine	Tourism and hospitality management certificate
Hotel and Vocational Training School Mandalay / TRC Hotel & Vocational Training School Yangon	Mandalay and Yangon	Management training course (supervisory & managerial levels) Familiarisation training for national skill level assessment
Temasek International College	Yangon	Diploma in Hospitality Management Advanced Diploma in Hospitality Management
Asia Masters Hotel School	Yangon	Diploma and Advanced Diploma in Hospitality and Tourism
Centre of Excellence for Business Skills Development (Yangon University of Economics, UNESCO & PepsiCo partnership)	Yangon	Advanced Certificate in Hospitality Management Advanced Certificate in Tourism Management
Strategy First institute	Yangon	Hospitality Management course
Inspiro institute	Yangon	Tourism Management Diploma

Technical and Vocational Education and Training

Provider	Location	Qualification/programme
The Limited Edition Vocational Development Training Centre (TLE)	Yangon	Tourism tour guide course Int'l food production course Int'l bakery and pastry course Housekeeping operation course F&B service course
Lotus School of Hospitality	Yangon	Int'l bakery & pastry Int'l bakery & pastry decoration Housekeeping operation Front office operation
HTTC	Yangon	Front office operations Housekeeping Operations F&B service F&B production Hotel Accounting Oriental food / cookery Hotel English Restaurant English Tourism English Hotel management development Basic computer and fidelio system
Star resources	Yangon	Front Office course Tour guide course Flight attendant course F&B course Housekeeping operation course Int'l culinary course Int'l bakery and pastry course Diploma in tourism and hospitality management Special beverage course Hospitality English course MBA in hospitality management

Shwe Sa Bwe	Yangon	CBT on culinary and F&B
Hotel and Vocational Training School Mandalay / TRC Hotel & Vocational Training School Yangon	Mandalay / Yangon	Basic Hotel Management Int'l Bakery & Pastry course Int'l cookery course Int'l hotel operations course Int'l front office course Int'l food and beverage service course Int'l Housekeeping operations course travel Agency course Basic Tour operation training Basic tour guide training Tour guide refresher training Int'l Hotel and tourism English course Basic food safety & hygiene course Management training course Familiarization training for national skill level assessment
Asia Masters Hotel School	Yangon	Food and Beverage Service Front office and flight attendance Food Production (cookery) Food Production (pastry) Bartender Housekeeping CTH diploma and advanced diploma in Hospitality and Tourism
Daw Khin Kyi Foundation	Yangon	Hospitality Foundation Course Hospitality Advanced Course Culinary Foundation Course Culinary Advanced Course
Myanmar Baking Training Centre (Eldorado)	Yangon	Baking and Pastry courses
Singapore-Myanmar Vocational Training Institute (SMVTI)	Yangon	Front Office Operations Housekeeping Operations Restaurant Operations
Centre for Vocational Training	Yangon	Diploma in Hospitality Operation
Swiss Contact	Myanmar	Vocational Skills Development Programme (VSDP) – Hotel Training Initiative (HTI Component)
Inle Heritage Hospitality Vocational Training Centre (IHHVTC)	Inle	Housekeeping operation course Front office course F&B service course Culinary course
Mandalay Philanthropic Hotel Training School	Mandalay	Cooking course Front office course F&B production course English for hospitality
Hospitality Institute of Asia (HIA)	Yangon	Certificates in Culinary Skills Certificates in F&B Service Skills Applied Housekeeping Operations Skills Applied Front Office Operations Skills
Columbus Vocational Educational Centre	Yangon	Travel agency foundation course





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