Skills for Trade and Economic Diversification

Tourist Guides Sector, Myanmar

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Foreword

“Skills development is [...] essential to address the opportunities and challenges to meet new demands of changing economies and new technologies in the context of globalization.”

Conclusions on skills for improved productivity, employment growth and development,
International Labour Conference, 2008.

“As the only service export sector with a trade surplus, tourism is considered as a key export sector for Myanmar. […] The development of the sector could have a high socio economic impact since the sector can be a driver of job creation. […] Tourism can hold a great potential for Myanmar and can generate investment in transport, hotels, restaurants, arts and culture, and travel.”

National Export Strategy of the Republic of the Union of Myanmar 2015-2019
Ministry of Commerce & International Trade Centre

This report presents an application of the Skills for Trade and Economic Diversification (STED) methodology to the Tourism sector of Myanmar, with specific focus on tourist guides. STED is a sector-based approach to identifying and anticipating the strategic skills needs of internationally tradable sectors. It has been developed in recognition of the fact that having the right skills among workers is crucial for firms or industries to succeed in trade, and vice-versa, understanding trade is important to provide workers with the right skills. Availability of skilled workers contributes to higher and more diversified exports, more foreign direct investment, higher absorption of technology, and more sustainable growth and productive employment creation. At the same time, skills are the key determinant for a worker’s success in finding a good job and making a living. In order for skills supply to match skills demand in the labour market, it is necessary to take a forward-looking perspective, and to ask not just what skills are in demand today, but what skills will be in demand in the future.

The STED methodology has been applied in two economic sectors in Myanmar – Tourism and Vegetables and Fruits, with funding support from SIDA. The sectors were chosen in consultation with the ILO’s tripartite constituents in Myanmar, and the STED process has been undertaken in collaboration with the Project Steering Committee, the Ministry of Labour, Immigration and Population, Ministry of Hotels and Tourism, the National Skills Standards Authority, the Ministry of Agriculture, Livestock and Irrigation. The specific focus on Tourist Guides was made as a parallel work and input to the formulation of the National Tourism Human Resource Development Strategic Action Plan.

This report, and the companion report on the vegetables and fruits sector, set out a range of recommendations that together amount to a strategic skills agenda for each of the two sectors covered. Implementation of these agenda depends primarily on Myanmar stakeholders at sector and national level, although there is room for development partners to play a supporting and enabling role. The project plans to follow up the reports by supporting implementation of a number of these recommendations in collaboration with stakeholders.

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This report was written by Steve Noakes (Consultant) with contributions from Paul Rogers (Consultant), Ma. Concepcion Sardaña (ILO STED Chief Technical Advisor), Qingrui Huang (ILO STED Technical Officer), and Sandar Win (STED National Project Coordinator). Primary data were generated from a STED survey on tourist guides conducted in December 2015 conducted by Steve Noakes (Consultant), Qingrui Huang (ILO STED Technical Officer), and Sandar Win (STED National Project Coordinator) in Yangon, Mandalay, Inle Lake and Bagan. Technical guidance on the survey design and inputs to the report were provided by Carmela Torres (Senior Skills and Employability Specialist, ILO Decent Work Team in Bangkok), Cornelius Gregg (ILO Skills Technical Specialist, ILO Employment Policy Department, Geneva), and Bolormaa Tumurchudur Klok (Technical Officer, ILO Employment Policy Department, Geneva).

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Particular thanks are due to the Ministry of Labour, Immigration and Population, Ministry of Hotels and Tourism, and members of the STED Project Steering Committee. Many industry stakeholders from government, chambers, private sector, and trade unions generously gave their time and insights during workshops and interviews, and through participating in the steering committee for STED work in the sector.

All errors and omissions remain the responsibility of the authors.

Executive Summary

This report was prepared under the Myanmar component of the ILO's Scaling Up STED: Skills for Trade and Economic Development Diversification (STED) project. The project aims to improve the outcomes of Myanmar's TVET training courses and link them to the country's anticipated economic and employment growth in selected export sectors through the implementation of comprehensive assessments followed by recommendations and possible policy interventions.

Tourism provides new opportunities for international cooperation, trade and investment; therefore, it is regarded as one of the sectors capable of generating new export earnings for Myanmar, and hence boosting further economic growth. Given the complex nature of tourism and its integration into a broad range of sectors within Myanmar's national economy, and noting the strategic tourism policy framework and priorities of government and industry, it was determined to focus this particular STED implementation process on the tourist guides sector. Cooperation and coordination between government agencies, development partners and social groups such as the Myanmar Tourist Guide Association (MTGA) representing the working guides and the Union of Myanmar Travel Association (UMTA) representing the employer sector have been a key feature of the STED process. Tourist guides have an especially central role in Myanmar tourism, with a strong focus on small groups travelling between and visiting geographically and ethnically dispersed cultural and natural attractions, and needing support from a tourist guide to do this.

This STED project has contributed to the implementation of key actions from the Tourist Guide Policy Framework 2015 supported by the Business Innovation Facility (BIF) project funded by the Department for International Development (DFID) of Government of United Kingdom. It has also provided strategic inputs on tourist guide training needs assessment within the Myanmar Tourism Human Resource Development Strategy and Action Plan (MTHRDSAP) being developed by the Ministry of Hotels and Tourism (MoHT) with the support of the Luxembourg Agency for Development Cooperation (LuxDev).

This report articulates the main findings of the STED Sector Needs Survey (hereafter referred to as the STED Survey) conducted in December 2015 on the tourist guides sector of Myanmar's tourism industry. The objective of the survey was to understand the general structure of, and contemporary industry views on, the skills levels, competencies and employability of graduates in the sector. The report also incorporates the inputs from the National Consultation Meeting On the Implementation of Skill Development for Tourist Guides (hereafter referred to as the National Consultation Meeting) participated by key public and private sector stakeholder groups in February 2016 and provides recommendations on the directions and further actions for the skills development of the tourist guide sector.

The total number of licensed national and regional tourist guides in Myanmar has increased by 38 per cent from 4,077 in 2010 to 5,630 in 2015. This growth trend has continued with MoHT reporting a total of 6,308 licensed tourist guides after the first four months of 2016. The STED process considered two different approaches to develop a scale of the total demand for national and regional guides over the five years to 2020. It is important to note that anticipating future demand for licensed tourist guides is not an exact science. Nevertheless, by analyzing recent trends in the number of licensed tourist guides in Myanmar against international visitor arrival data provided by MoHT, and making some reasonable assumptions, the report provides a forecast on how many guides will be needed.

The first forecast approach simply considered the growth rate in licensed guide numbers for five years from 2010 to 2015 when international tourist arrivals increased almost six fold, and then applied that rate for the five years up to 2020. This resulted in a projection that the number of guides might increase from 5,630 in 2015 to 7,769 by 2020. Based on industry responses during the STED Survey, this figure would be conservative in terms of industry expectations of the future demand for guides. The second forecast approach considered available MoHT tourist guide data more deeply, including determining historical ratios of numbers of licensed guides per number of international visitor arrivals. It also considered the primary languages international visitors are most likely to speak as well as data from MoHT which reports on both national and regional guides and the specific foreign language they have studied during their formal MoHT guide training programme. Based on the visitor arrival forecasts from the Myanmar Tourism Master Plan 2013-2020 (MTMP), this method forecasts that by 2020, the conservative estimate for the number of licensed tourist guides would be 12,332, the mid-range forecast is 13,912 and the high range forecast is 16,824. Given that actual international visitor arrivals into Myanmar in recent years have exceeded the high growth scenario from the MTMP and this trend appears to be continuing, it is reasonable to assume that by 2020, the demand for licensed tourist guides in Myanmar will be in the order of 17,000 at national and regional levels taken together.

Having said that, the business development constraints faced by a tourist guide or a tour operator who hires tourist guides have been persistent. Such constraints include pervasive government controls, inefficient economic policies, underdeveloped financial systems, corruption, insufficient market-driven skills development and rural poverty. Under this circumstance, tourist guides have to be self-motivated micro-entrepreneurs if they are to succeed as licensed professionals within the dynamic local Myanmar labour market. According to the STED Survey, most guides have their own independent business which provides services to tour operators or independent travellers, while only a small share are employed directly by tour operators.

Most business for guides comes as a result of contracts with tour operators. Accordingly, guides need to establish and maintain good working relationships with key tour operator officials who are responsible for sub-contracting the guides. The guides constantly face challenges relating to seasonality of work flows, a wide range of remuneration levels for junior and senior guides, and changes in the key personal of the tour operators from which they derive

much of their contract business. In addition, they are also concerned about losing contract work opportunities and the quality of interpretive service delivery caused by lack of regulatory enforcement in relation to the number of unlicensed guides operating in the country.

The decision by a visitor to return for a future trip, or to refer a particular inbound tourism service to other potential tourists into Myanmar, is significantly influenced by the quality of service experience they had from one or more tourist guides. Therefore, it is crucial to furnish guides with comprehensive skills such as organizing and managing small and large groups of people, adequately facilitating encounters with local people and other tourists, possessing leadership skills to manage any tensions and social integration, and providing culturally appropriate and accurate information and translation of topics that are unfamiliar to the customer, just to name a few.

As Myanmar's tourist guides cater for visitors from all continents with a wide range of language and cultural diversity, they need the appropriate training and skills for quality customer service delivery, as well as the knowledge and skills to undertake their special role and responsibility in the management of tourism resources and impacts throughout the country. It is important to ensure skills training and qualifications frameworks which enable guides to work at different industry levels – from the site level, such as undertaking simple village excursions – to the national level where they are required to manage group movements around the country

In this connection, this report provides detailed recommendation for possible improvements of skills development in tourist guides sector at policy, institution, and enterprise level:

The report highlights the importance of continuing to develop policies and implement actions for the tourist guide sector which should be consistent with the guiding principles for the tourism sector outlined in national policy documents, in particular, the MTMP and MTHRDSAP.

At institution level, the report emphasizes the urgency of capacity building for the key stakeholders related to tourist guides skills development. The MTGA for instance, requires special skills and resources to be able to act effectively on behalf of its constituency to take part in national policymaking process such as the development of skills standards and qualifications frameworks for tourist guides. Likewise, the National Skills Standards Authority (NSSA), MoHT, Myanmar Tourism Human Resources Development Association (MTHRDA), and other government agencies should also understand their respective roles and responsibilities in this regard.

At enterprise level, in order to meet the future market needs for tourist guides, it is recommended to establish public private sector mechanisms to reach agreement on how to best take knowledge and perceptions from industry into government-led agencies or initiatives that directly impact on TVET issues relating to tourist guides. It is also important to increase industry awareness about skills development methodologies, principles and benefits for the industry to reach its full potential.

Abbreviations

ACMECS	Ayeyawady-Chao Phaya-Mekong Economic Cooperation Strategy
ADB	Asian Development Bank
AQAF	ASEAN Qualifications Recognition Framework
ASEAN	Association of Southeast Asian Nations
BIMSTEC	Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation
DFID	Department for International Development
DPTOA	Domestic Pilgrimage & Tour Operators Association
EU	European Union
FIT	Free Independent Travel or Foreign Independent Traveller
GDP	Gross Domestic Product
GoM	Government of Myanmar
IATA	International Air Transport Association
ILO	International Labour Organization
ISCO	International Standard Classification of Occupations
IT	Information Technology
LuxDev	Luxembourg Agency for Development Cooperation
MCRB	Myanmar Centre of Responsible Business
MEM	Myanmar Economic Monitor
MHA	Myanmar Hoteliers Association
MHPA	Myanmar Hospitality Professionals Association
MIMU	Myanmar Information Management Unit
MoLIP	Ministry of Labour, Immigration and Population
MoHT	Ministry of Hotels and Tourism
MMK	Myanmar Kyat
MRA	Myanmar Restaurants Association
MSCO	Myanmar Standard Classification of Occupations
MSEA	Myanmar Souvenir Entrepreneurs Association
MTF	Myanmar Tourism Federation

MTGA	Myanmar Tourist Guides Association
MTHCGSA	Myanmar Tourist Health Care & General Services Association
MTHRDA	Myanmar Tourism Human Resources Development Association
MTHRDSAP	Myanmar Tourism Human Resources Development Strategy and Action Plan
MTM	Myanmar Tourism Marketing
MTMP	Myanmar Tourism Master Plan 2013-2020
MTTA	Myanmar Tourism Transportation Association
NA	National Accounts
NES	National Export Strategy
NGO	Non-Governmental Organization
NORAD	Norwegian Agency for Development Cooperation
NSSA	National Skill Standards Authority
NTPB	National Tourism Professionals Board
RPL	Recognition of Prior Learning
SEATGA	South East Asia Tour Guide Association
SIDA	Swedish International Development Cooperation Agency
STED	Skills for Trade and Economic Diversification
SWOT	Strengths, Weaknesses, Opportunities and Threats
T&T	Travel and Tourism
TIM	Tourism Income Multiplier
TPCB	Tourism Professional Certification Board
TVET	Technical and Vocational Education and Training
UMTA	Union of Myanmar Travel Association
UNWTO	United Nations World Tourism Organization

Introduction & Objectives

Skills for Trade and Economic Diversification (STED) is a technical assistance tool developed by the International Labour Organization (ILO) that provides strategic guidance for the integration of skills development in sectoral policies1. It is designed to support growth and decent employment creation in sectors that have the potential to increase exports and to contribute to economic diversification.

In 2015, with the support of the Swedish International Development Agency (SIDA), the ILO commenced the Scaling up STED: Skills for Trade and Economic Diversification Project in Myanmar. The primary development goal is to improve the outcomes of Myanmar's skills development strategy and link them to the country's economic and employment growth expected in selected export sectors. The tourism sector was identified as a strategic component of Myanmar's future economic growth, providing new opportunities for international cooperation, trade and investment.

Given the complex and highly integrated nature of tourism into many sectors of the Myanmar's national economy and noting the strategic tourism policy framework and priorities of government and industry, it was determined to cast the Project's focus on the tourist guides sector. This is because tourist guiding is a visitor service required throughout Myanmar. It is an essential profession in providing local language and culturally appropriate quality interpretation as well as developing new destinations and products. By encouraging economic diversification throughout country, more and better full time and part time jobs are created for women and men; new employment opportunities are also generated which could benefit specific groups such as semi-retired or retired people or those who might be experiencing work transitions.

Key national plans and policies were analysed during the Project implementation to ensure consistency in strategic direction and assess where the STED process could assist with any implementation relevant to the skills development needs of the tourist guides sector. These included the Myanmar Tourism Master Plan (MTMP) 2013-2020, the Myanmar Tourist Guide Policy Framework 2015, and the forthcoming Myanmar Tourism Human Resources Development Strategy and Action Plan (MRHRDSAP)2.

This Report articulates the main findings of the STED Sector Needs Survey (hereafter referred to as the STED Survey) conducted in December 2015 on the tourist guides sector. The objective of the survey was to understand the general structure of, and contemporary industry views on, the skills levels, competencies and employability of graduates. The report also considers the inputs from the National Consultation Meeting on the Implementation of Skill Development for Tourist Guides (hereafter referred to as the National Consultation Meeting) in February 2016 and provides recommendations on the directions and further actions for the skills development of Myanmar's tourist guide sector. (See Box 1)

The outcomes of STED analysis provide recommendations at policy, institutional, and enterprise level. The ultimate aim is to enhance the generation of exports dollars from the expenditure of international tourists who require the use of licensed tourist guides during their travel within Myanmar. It also aims to improve the competitiveness of the sector through developing workers' skills resulting in higher quality professional service delivery. Besides, the STED analysis attempts to help policy makers and tourism industry stakeholders as they develop institutions, educational and training systems and qualifications processes to ensure that tourist guides acquire the right skills needed to find productive employment.

1 More details about STED is available at www.ilo.org/sted

2 Myanmar Tourism Human Resource Development Strategy & Action Plan is the product of collaboration between Myanmar's Ministry of Hotels and Tourism and Luxembourg's Agency for Development Cooperation being developed by Ministry of Hotels and Tourism.

Box 1:
The National Consultation Meeting on the Implementation of Skills Development for Tourist Guides

On 10 February 2016, the National Consultation Meeting was held at Inya Lake Hotel in Yangon to present the preliminary findings of the STED Sector Needs Survey on Tourist Guides. It also aimed promote a clearer understanding among key stakeholders of terminology, processes, their respective roles and necessary steps related to the development of a professional tourist guide industry in Myanmar.

The National Skills Standards Authority (NSSA) took the lead in the meeting which was attended by key stakeholders including senior officials of the Ministry of Labour, Employment and Social Security; Ministry of Hotels and Tourism, Ministry of Education; Myanmar's tourist guide associations based in major tourist destinations including Inle Lake, Mandalay, Bagan and Yangon; Union of Myanmar Travel Association (UMTA); Myanmar Tourism Human Resources Development Association (MTHRDA); Union of Myanmar Federation of Chambers of Commerce (UMFCCI); and workers groups such as Confederation of Trade Unions Myanmar (CTUM), Myanmar Industries, Craft and Services Union Federation (MICS), Farmers Federation of Myanmar (AFFM-IUF). Also present were development partners such as GIZ, LuxDev, BIF/Hamsahub (UKAID), Asian Development Bank, Japan Development Service, JICA, and Helevetas Myanmar.

A key product the workshop is a short-term action plan that included the development of national occupational standards for tourist guides and capacity building for both government and industry to understand the occupation standard development process.

Chapter 1: Sector Characterization

Focusing on the concepts of tourism and the tourism sector, as well as employment and economic impacts from the tourism industry, this section describes the tourist guide sector in both quantitative and qualitative terms.

1.1 Sector definition: Tourism

Transition economies such as Myanmar most often embark on a strategic national economic development approach to tourism, with the aim of taking advantage of the employment generation and economic expansion and diversification opportunities that the tourism sector can provide. In this section, in addition to describing the notion of 'tourism' and the 'tourism sector', it is therefore also relevant to consider technical descriptions of the different forms of employment and economic impact that tourist expenditure has on economies.

1.1.1 Tourism

The United Nations World Tourism Organization (UNWTO) describes 'tourism' as a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.

According to the UNWTO's definition, "a visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise.[3]" In this definition, it distinguishes a "tourist" from a "same-day visitor" by the length of his or her stay in a certain destination.

Myanmar's Hotel and Tourism Law No 14/93 1993[4] did not provide a specific definition on the term "tourist" itself. Instead, it defined the term "foreign tourist" as "international tourists or foreign visitors". The definition has created ambiguity when it comes to the statistical treatment of the total number of international tourists who mostly would use overnight commercial accommodation, local tourist guides, local restaurants and other tourism services. It also creates some concerns of the tourism industry about the reliability of data on growth in tourist numbers. The draft Myanmar Tourism Business Law describes a "tourist" as "a visitor whose trip includes an overnight stay as well as a same-day visitor (domestic, inbound or outbound)" [5].

3 UNTWO, Glossary of Tourism Terms, available online at http://cf.cdn.unwto.org/sites/all/files/Glossary+of+terms.pdf, last access on 10 October 2016

4 Myanmar Hotel and Tourism Law No 14/93, 1993, http://www.myanmartourism.org/index.php/aboutus/myanmar-hotel-and-tourism-law (access on 10 October 2016)

5 Myanmar Tourism Business Law (draft), http://www.myanmartourism.org/images/tourism-draft-law/New-Tourism-Draft-Law-Myanmar-English.pdf (10 October 2016)

1.1.2 Tourism sector

The concept of a "tourism sector" is explained by the UNWTO as a "cluster of production units in different industries that provide the goods and services demanded by visitors" (UNWTO, 2014). That also means that "tourism" is not defined as its own sector within National Accounts (NA) of any country. The UNWTO further explains the term 'tourism industries' as those including industries that typically produce tourism characteristic products. The following list indicates the identified industries in this regard:[6]

1. Accommodation for visitors
2. Food and beverage serving activities
3. Railway passenger transport
4. Road passenger transport
5. Water passenger transport
6. Air passenger transport
7. Transport equipment rental
8. Travel agencies and other reservation services activities
9. Cultural activities
10. Sports and recreational activities
11. Retail trade of country-specific tourism characteristic goods
12. Other country-specific tourism characteristic activities

1.1.3 Employment generated from tourism

Each of the above "tourism industries" is considered when measuring tourism employment generated by tourism. Tourism employment can be categorized in terms of direct employment in the tourism industries. It can also encompass indirect employment in sectors that provide various inputs to the tourism industries. For example, food and beverage suppliers to restaurants and hotels, suppliers in the construction of new hotels, resorts or guesthouses, professional financial and legal services, and so on.

1.1.4 Economic impact from tourism

In addition to the generation of employment opportunities, tourism has the capacity to bring significant economic benefit to countries through foreign exchange earnings, and to contribute to national income and economic diversification of infrastructure and services away from the primary gateway destinations.

As it supplies services to tourists (consumers) and tourism related businesses such as retail, restaurants, transportation etc., tourism development is most often associated with job creation in services sectors. However, it also encourages growth in primary production (such as producing raw materials to support the equipment and materials needed for the construction of hotels, airports, and seaports, etc.), and in manufacturing sectors (such as transforming raw materials into buses, passengers vessels and aircraft, or textiles into clothing sold in retail outlets frequented by tourists, etc.). This effect is often known as the tourism income multiplier (TIM), which in its simplest form is how many times money spent by a tourist circulates through a country's economy. The transfer of tourist expenditure as such does not always yield very positive economic consequences, as there can be substantial leakages, particularly in developing countries in which provision of tourism services relies heavily on foreign imports. Where local tourism products (hotels, transport operators etc.) are foreign owned, profits earned may be repatriated back to the headquarters, reducing the benefit to the destination. Along with the purchase of imports for tourism operations, this contributes to economic leakage which reduces the impact and benefits of TIM. The challenge for policy makers is therefore to encourage a business environment that can give an appropriate trade-off between the reduction in benefits that occurs through leakage, and the benefits gained from investment and technical knowhow that are usually associated with foreign direct investment.

6 Detailed descriptions of each 'industry' is in 'Conceptual references and technical notes of the Compendium' (UNWTO 2015) and are consistent with the International Standard Industrial Classification of All Economic Activities (ISIC), Rev. 4. Statistical papers (Series M No. 4/Rev.4), United Nations. New York, 2008.

1.2 Sector definition: Tourist Guide

As an industry grouping, the "tourist guide" sector is a subset of the tourism sector. The World Federation of Tourist Guide Associations (WFTGA) defines a "tourist guide" as "a person who guides visitors in the language of their choice and interprets the cultural and natural heritage of an area which person normally possesses an area-specific qualification usually issued and/or recognized by the appropriate authority."[7] To avoid confusion between a "tourist guide" and a "tour manager/director/escort", WFTGA defines the latter as "A person who manages an itinerary on behalf of the tour operator ensuring the programme is carried out as described in the tour operator's literature and sold to the traveller/consumer and who gives local practical information."[8] A fundamental difference between these two terminologies is that a tour manager "may or may not be tourist guides [...] They are not trained or licensed to work in specific areas unless they have the proper requirements or legal right, depending on the region." [9]

Tourist guides, as any other occupations (if applied), are bound by a series of work ethics and responsibilities accepted internationally. The WFTGA publishes a Code of Conduct for Tour Guides which sets out the following principles and aims:

To provide a professional service to visitors, professional in care and commitment, and professional in providing an objective understanding of the place visited, free from prejudice or propaganda.

To ensure that as far as possible what is presented as fact is true, and that a clear distinction is made between this truth and stories, legends, traditions, or opinions.

To act fairly and reasonable in all dealings with all those who engage the services of guides and with colleagues working in all aspects of tourism.

To protect the reputation of tourism in our country by making every endeavour to ensure that guided groups treat with respect the environment, wildlife, sights and monuments, and also local customs and sensitivities.

As representatives of the host country to welcome visitors and act in such a way as to bring credit to the country visited and promote it as a tourist destination.

WFTGA has also signed up to the UNWTO Global Code of Ethics for Tourism, a voluntary but fundamental frame of reference for responsible and sustainable tourism adopted in 1999 by the General Assembly of the World Tourism Organization, and acknowledgement by the United Nations in 2001. The South East Asia Tour Guide Association (SEATGA) uses the same definitions for a tour guide as the WFTGA and also endorses and promotes the WFTGA Code of Conduct. The Myanmar Tourist Guide Association (MTGA) is a member of SEATGA.

1.3 Sector profiling

Within Myanmar, demand from international travel markets and interest in new tourism related infrastructure development continue to increase tourism's contribution to the national economy. Additionally, increasing prosperity within the local population is driving the development of a larger domestic tourism market. Together, international and domestic tourism demand are contributing to opening up new employment options for the population, away from the predominant agriculture and related sectors and into opportunities in service sectors such as tourism.

The Government of Myanmar (GoM) identified the tourism sector in its first National Export Strategy 2015 – 2019 (NES)[10] as a key driver of socio-economic progress given its potential to create new jobs, develop new businesses as well as generate export revenues, and infrastructure development that serve the needs of the tourists as well as the local population.

7 World Federation of Tourist Guide Associations 10th International Convention Dunblane, United Kingdom 2003 http://www.wftga.org/tourist-guiding/what-tourist-guide

8 ibid

9 ibid

10 The tourism industry is one of seven economic pillars promoted by the Government of the Republic of the Union of Myanmar (GOM) to support reform processes, create jobs and stimulate expansion of the wider economy.

1.3.1 National economic context

Despite significant natural disasters in 2015 causing loss of life and damage to agriculture and infrastructure, Myanmar's overall economy continues to expand. The World Bank reports that Myanmar's GDP at market prices was USD$64.33 billion[11] in 2014. Myanmar's economy grew at 8.5 per cent in real terms in 2014/15 – and is projected to slow down to a more moderate 6.5 per cent in 2015/16 due to floods and slowing investments[12].

A more positive outlook was published in the Asian Development Outlook 2016 by the Asian Development Bank (ADB, 2016), in which it forecasts Myanmar GDP growth rate at 8.4 per cent in 2016 and projects the inflation rate to "remain high at 9.5% in FY [fiscal year] 2016 and 8.5% in FY2017". The substantial depreciation of the Myanmar Kyat (MMK) against the US dollar (by 24 per cent, from MK965 in April 2014 to MK1,275 in early September 2015[13]) has made Myanmar a more attractive, cost-effective destination for many international markets where local currencies have performed better against the US dollar (USD).

1.3.2 Economic contribution from tourism

Tourism was an underdeveloped sector within Myanmar's economy for the half-century before the recent political transition processes. However, between 2009 and 2015, international tourist arrivals posted an average annual growth of about 35 per cent (Rahardja et al, 2016).

As noted in the high-scenario forecast on visitor arrivals within the MTMP (MoHT, 2013), the contribution of the tourism sector to the national economy is projected to increase from a baseline of US$534 million in 2012 to US$10.18 billion in 2020. The World Travel and Tourism Council (WTTC) reports the direct contribution[14] under the "Travel and Tourism" Category to Myanmar's GDP was MMK 1,347.4 billion (approx. USD $1.15 billion) representing 2.2 per cent of total GDP in 2014, and is forecasted to rise by 8.4 per cent per annum to MMK3,212.2 billion (approx. US$2.75 billion) between 2015 and 2025, representing 2.7 per cent of total GDP in 2025 (WTTC, 2015).

In terms of total contribution[15] of travel and tourism to Myanmar's GDP, WTTC (2015) reports MMK 3,025.6 billion (approx. US$2.59 billion) representing 4.8 per cent of GDP in 2014, and the amount is forecasted to rise by 8.4 per cent per annum to MMK7,219.3 billion (approx. US$ 6.18 billion), representing 6.1 per cent of GDP in 2025.

1.3.3 Population context

While much analytical emphasis is placed on the higher yielding international visitor markets into Myanmar, there is also a growing domestic market for tourism services across the country. In the past four decades, Myanmar's population has expanded from 28.9 million in 1973 to 51.5 million in 2014[16]. The United Nations Population Fund (2015) notes that 51.8 per cent of the total population are women and 48.2 per cent are men. The median age is 27.1 years and life expectancy at birth is 66.8 years.

1.3.4 Labour/workforce context

Table 1 presents a summary of the Myanmar Labour Force, Child Labour and School to Work Transition Survey (2015). Although the overall unemployment rate was as low as 0.8 per cent, the aggregate measure of the labour

11 http://data.worldbank.org/country/myanmar (access on 21 September 2016)

12 www.worldbank.org/en/country/myanmar/overview (access on 01 August 2016)

13 ADB, Asian Development Outlook Update, 2015, p 219

14 According to WTTC: the direct contribution of travel and tourism to GDP reflects the 'internal' spending on travel and tourism (total spending within a particular country on travel and tourism by residents and non-residents for business and leisure purposes) as well as government 'individual' spending - spending by government on travel and tourism services directly linked to visitors, such as cultural (e.g. museums) or recreational (e.g. national parks).

15 According to WTTC: the total contribution of travel and tourism includes its 'wider impacts' (i.e. the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by travel and tourism investment. The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the travel and tourism sector

16 Ministry of Population and Immigration (2015) Myanmar Population and Housing Census, p12.

underutilization rate which comprises unemployment, underemployment and potential labour force[17], was much higher at 6.9 per cent and higher for females than for males. According to the Survey, the unemployment rate recorded "is too low especially because the country does not have unemployment benefits and people have to take up jobs irrespective of choice just for survival". Meanwhile, almost half of the female population 15 years and above were reported as not part of the labour force.

Table 1: Summary of Labour Force Statistics, 2015

	Total	Male	Female
Working age population (15 years and above)	33 934 662	15 553 856	18 380 805
Labour force	21 959 797	12 474 495	9 485 302
Employment	21 791 335	12 391 395	9 399 940
Unemployment	168 462	83 100	85 362
Labour force participation rate (%)	64.7	80.2	51.6
Unemployment rate (%)	0.8	0.7	0.9
Aggregate measure of labour underutilization (%)	6.9	6.0	8.1
Average weekly working hours	51.55	52.74	49.97
Average monthly wage (in ,000 Kyats)	134.49	147.2	119.04

Source: Myanmar Labour Force, Child Labour and School to Work Transition Survey 2015

Table 2 shows that employed persons were mostly in the agriculture, forestry and fishing sector (51.7 per cent). Wholesale and retail trade together with repair of motor vehicles and motorcycles sector accounted for 14.3 per cent while manufacturing employed 10.9 per cent.

Table 2: Percentage of Employed Persons by Industry Group

Industry Group	% to Total Employed
Agriculture, forestry and fishing	51.7
Wholesale and retail trade; repair of motor vehicles and motorcycles	14.3
Manufacturing	10.9
Others	9.1
Construction	4.7
Transportation and storage	4.4
Administrative and support service activities	2.3
Accommodation and food service activities	1.3
Mining and quarrying	0.9
Domestic	0.3
Electricity, gas, steam and air conditioning supply	0.1

Source: Myanmar Labour Force, Child Labour and School to Work Transition Survey 2015

By occupation, the biggest group of employed is comprised of agricultural, forestry and fishery workers (42.7 per cent). The other notable groups of employed are those in elementary occupations (17.8 per cent); service and sales workers (16.0 per cent); craft and related trades workers (11.9 per cent).

17 Labour underutilization refers to mismatches between labour supply and demand, which translate to an unmet need for employment among the population. Meanwhile, potential labour force refer to persons not in employment who express an interest in a particular form of work but for whom existing conditions limit their active job search and/or their availability.

Table 3: Percentage of Employed Persons by Occupation

Occupation	% to Total Employed
Agricultural, forestry and fishery workers	42.7
Elementary occupations	17.8
Service and sales workers	16.0
Craft and related trades workers	11.9
Plant and machine operators, and assemblers	4.5
Professionals	2.9
Technicians and associate professionals	1.9
Clerical support workers	1.5
Managers	0.7
Armed forces occupations	0.1

Source: Myanmar Labour Force, Child Labour and School to Work Transition Survey 2015

In practice, some from this underutilized labour group may be already engaged in tourism activities or may have some potential for some level of future tourism engagement, and particularly in need of trained tourist guides.

In the MTMP, the conservative growth forecast projects direct tourism employment at just over half-million jobs by 2020, while the high growth forecast projects direct employment of almost one and a half million, representing an increase of over a million jobs by 2020 (Table 4). The majority of these anticipated jobs are direct employment in the food and beverage, transport services and accommodation sectors.

Table 4: Estimated Direct Tourism Employment in Myanmar, 2012–2020

Subsector	Baseline	Conservative estimate		High estimate	
	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 WTTC (2015) estimates that in 2014 travel and tourism in Myanmar directly supported 505,000 jobs (1.8 per cent of total employment), and projects that this will increase by 7.0 per cent per annum to 1,057,000 jobs (3.2 per cent of total employment) in 2025. In 2014, the total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, was 4.0 per cent of total employment (1,134,500 jobs). This is expected to rise by 5.6 per cent per annum to 2,003,000 jobs in 2025 (6.0 per cent of total). There is no WTTC data specifically on the tourist guide sector in Myanmar.

1.4 Structure of the Myanmar tourism sector

There are both private sector and public sectors to consider regarding the structure of tourism in Myanmar. Additionally, numerous non-governmental organizations (NGOs) and international development partners are contributing to the planning and policy needs of the sector as well as providing support for training, entrepreneurship, product development and more effective industry associations.

1.4.1 Private sector

Under the guidance of the MoHT, the Myanmar Tourism Federation (MTF) was formed in 2011 by the (then) three existing associations: Myanmar Hoteliers Association, Union of Myanmar Travel Association, and Myanmar Marketing Committee. The MTF now has member organizations that have had varying degrees of success on behalf of their respective memberships. (See Box 2)

Box 2:
MTF member organizations

1. **MHA** .... Myanmar Hoteliers Association
2. **UMTA** .... Union of Myanmar Travel Association
3. **MTM** .... Myanmar Tourism Marketing
4. **MHPA** .... Myanmar Hospitality Professionals Association
5. **MRA** .... Myanmar Restaurants Association
6. **MTTA** .... Myanmar Tourism Transportation Association
7. **MSEA** .... Myanmar Souvenir Entrepreneurs Association
8. **DPTOA** .... Domestic Pilgrimage & Tour Operators Association
9. **MTHCGSA** .... Myanmar Tourist Health Care & General Services Association
10. **MTGA** .... Myanmar Tourist Guides Association
11. **MTHRDA** .... Myanmar Tourism Human Resources Development Association

Most of the above listed associations are small and lack sufficient resources to grow and serve their memberships effectively. There is a strong case to review the current structure of the MTF and the various industry subgroups to better meet the needs of the industry in its current phase of development.

1.4.2 Public sector

While the MoHT is not the only national government ministry engaged in tourism[18], it is the only ministry that is fully dedicated to the sector, and, as a result, plays the leadership role within government for the sector.

In April 2016, the MoHT was restructured into two core branches.

The first branch under the Permanent Secretary includes:

- Administration and Human Resources Department
- Policy Development
- Planning and Statistics Department
- Internal Audit and Finance Department
- Public Relations and Information Department
- Executive Office

The second branch is under the Director General, and includes:

- Administration and Finance Department
- Hotel and Tourism Supervision Department
- Training and Education Department
- Planning Department
- International and Regional Cooperation Department
- Tourism Promotion Department

18 The Myanmar Tourism Master Plan 2013-2020 noted some 25 GOM Ministries had tourism-related roles and responsibilities.

For the tourist guide sector, the Training and Education Department is the primary area of contact in relation to matters relating to skills development.

1.4.3 Non-Governmental Organizations (NGOs)

Domestic and international NGOs can play a significant role in the tourism development of emerging economies. They can provide a mechanism to allow the interests of all stakeholders to be taken into consideration; they can also provide a link between the desires and activities of communities, commerce, industry and government to enable local people to have better knowledge about the benefits and implications of tourism development on local economic, social and environmental issues. NGOs can also liaise between government, the private sector and communities to enable more community involvement in the tourism sector and encourage stronger commitment from both public and private sectors to deliver appropriate education and training, so that local communities would have the skills and resources needed to successfully engage in the tourism economy. For example, in Myanmar, the local NGO Yangon Heritage Trust has recently undertaken a study to address the issue regarding the architecture, culture and history of the central business district of Yangon. Likewise, in the tourism hotspot Inle Lake, the local NGO Inle Speaks' was supported by the Norwegian NGO, Partnerships for Change to undertake a range of activities to strengthen the capacity of the local branch of MTGA; it also carried out various skills development programmes to support human resources development of local tourism and hospitality industry. Another good example is the Myanmar Centre for Responsible Business (MCRB), a Yangon based initiative, which has published policy reports such as the Myanmar Tourism Sector Wide Impacts and the Transparency in Myanmar Enterprises in 2015, both of which include recommendations relevant to all those involved in the tourism and travel sector in Myanmar – including government, public corporations, private sector, and civil society, among others.

1.4.4 International development partners

Numerous multilateral and bilateral development partners are supporting a wide range of tourism and hospitality related initiatives across Myanmar. Without such contributions, many of the necessary planning, policy and implementation actions undertaken would have failed to get off the ground in a period of political and economic transition that a country such as Myanmar is experiencing.

With the support of the Governments of Canada and Switzerland, along with support from the European Commission, the Myanmar Information Management Unit (MIMU) includes a database on tourism related projects supported by international donors in Myanmar. As of June 2016, there were 49 such projects under the "Tourism Linked Initiatives" category19. All the projects were listed under one of the following ten topics: destination management and development, vocational training and education, labour issues and social dialogue, private sector and SME development, sustainable and community-based tourism, ecotourism, cultural heritage, child protection, institutional strengthening and academic cooperation. Among these projects, the topic of "Vocational Training and Education" encompasses ten projects, followed by seven projects each under "Destination Management and Development" and "Ecotourism". "Private Sector and SMEs Development" and "Sustainable and Community-based Tourism" also seemed to be attractive for development partners as there are six projects respectively under each of these two topics.

On some tourism related project initiatives, multilateral and bilateral development agencies are seen to collaborate closely. The development of the MTMP is a good example of such: it received financial and technical support from both the Government of Norway and ADB. Similar inter-agency collaboration has also been evident in the tourist guide sector where inter-agency cooperation has led to efficiencies in developing and advancing policy frameworks and implementing priority actions.

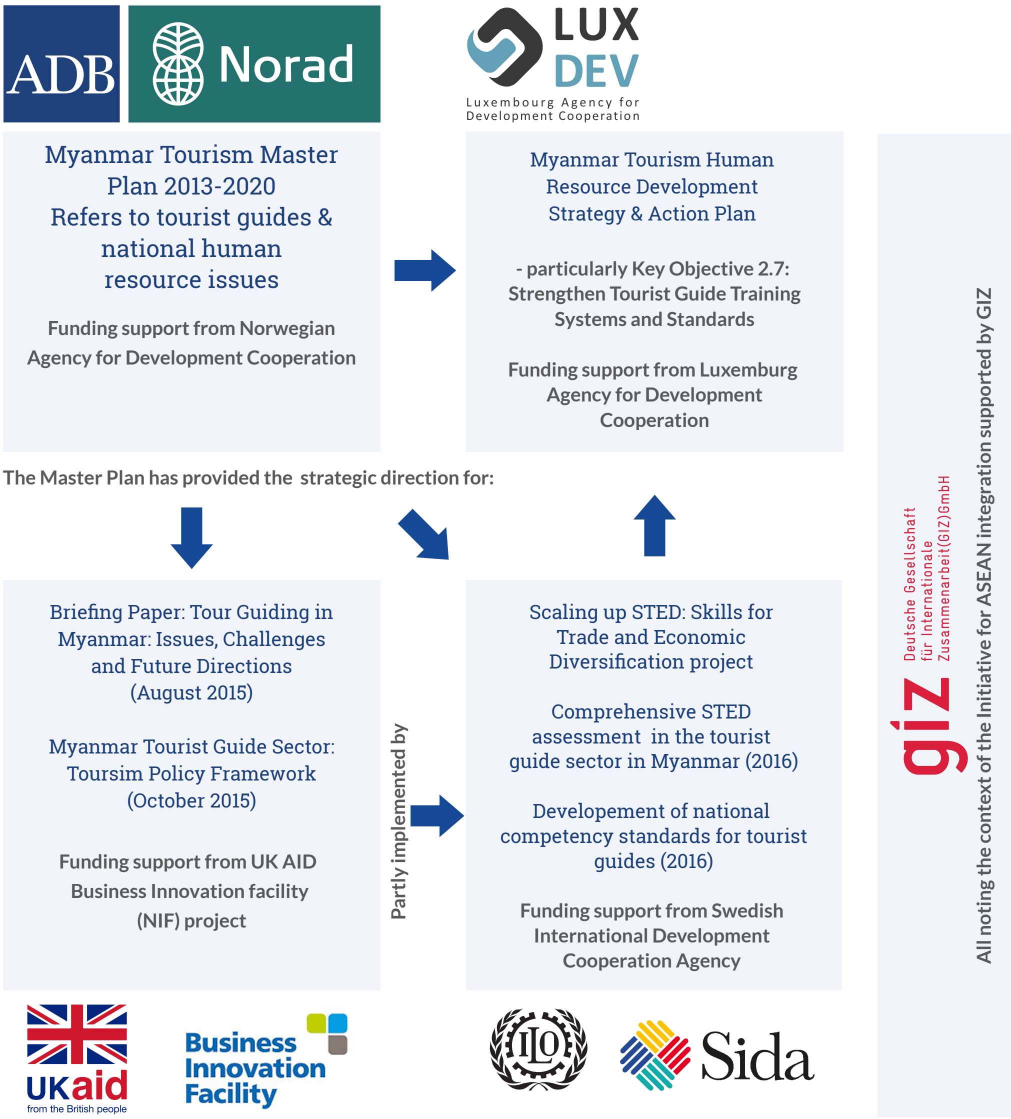
As illustrated in Diagram 1 below, following the MTMP which has recognized the key role of tourist guides to not only deliver interpretive services but also assist with expanding product development opportunities around the country, the BIF project looked deeper into key issues in the tourist guide sector and developed the Tourist Guide Policy Framework 2015 for the guides. This addresses nine key intervention areas (see Appendix 3 for more information on the Policy Framework). The interventions will be discussed in Section 3.3.

19 More information available at MIMU Tourism Linked Initiatives: http://www.themimu.info/sector/private-sector-development, (access on 1 August 2016)

The ILO's STED project is strategically designed to inform and advance a number of the nine key intervention areas within the Tourist Guide Policy Framework, particularly with respect to assisting NSSA with competency standards development for tourist guides, providing forums for enhanced collaboration between MTGA, UMTA and MoHT, and reviewing tourist guide training materials and curriculum.

With a high degree of collaboration with international partners, the projects supported by the BIF and the ILO have both been developed in the context of the ASEAN Integration and both have also provided valuable and critical inputs on the tourist guide sector to the development of MTHRDAP, which has itself been supported by the Luxembourg Agency for International Development (LuxDev). Deutsche Gesellschaft für Internationale Zusammenarbeit (German Corporation for International Cooperation or GIZ) also supports the country's initiatives related to the ASEAN Integration.

Diagram 1: Donor cooperation to advance the Myanmar tourist guide industry

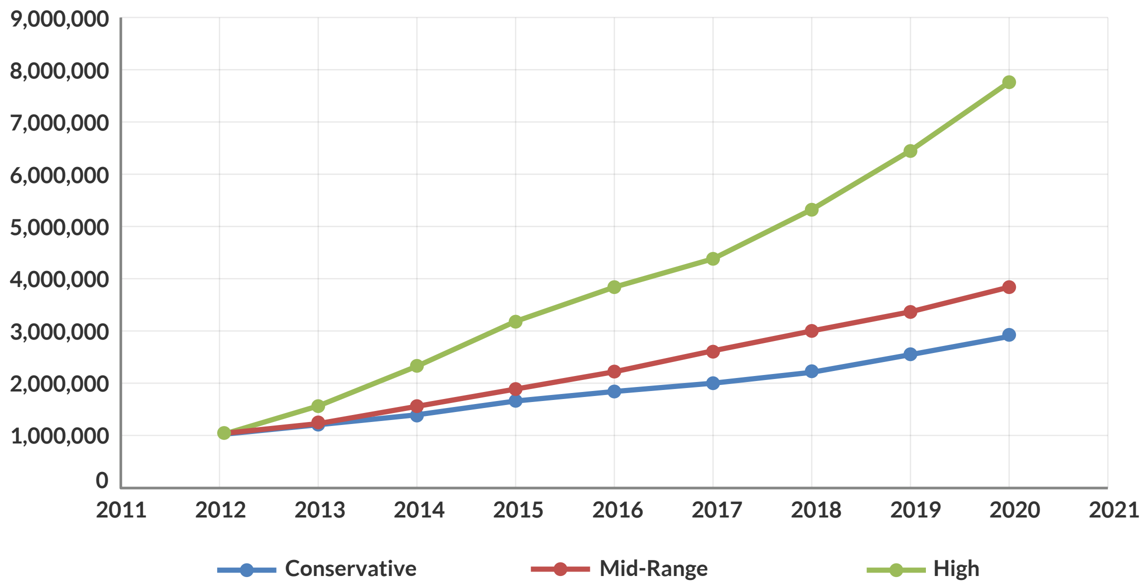


Source: diagram compiled by author

1.5 Patterns and Trends in Trade

This section provides the global, regional and Myanmar specific context for the emerging tourism sector. It also includes data on the number of licensed tourist guides in Myanmar. The advances in trade in tourism-services within Myanmar is occurring within a background of increasing global international tourist arrivals, a higher rate of growth for the Asia Pacific region, and an even higher rate of growth for South East Asian destinations. Within these patterns of international visitor arrival growth, Myanmar has experienced the highest rate of growth for international visitor arrivals over the past four years among all ASEAN nations, although from a low base. Myanmar is heading towards the achieving the 'high scenario' (Diagram 2) for international visitor arrivals as projected in the MTMP.

Diagram 2: Myanmar Visitor Forecasts, 2013 – 2020



Source of data: Myanmar Tourism Master Plan 2013-2020 (MoHT)

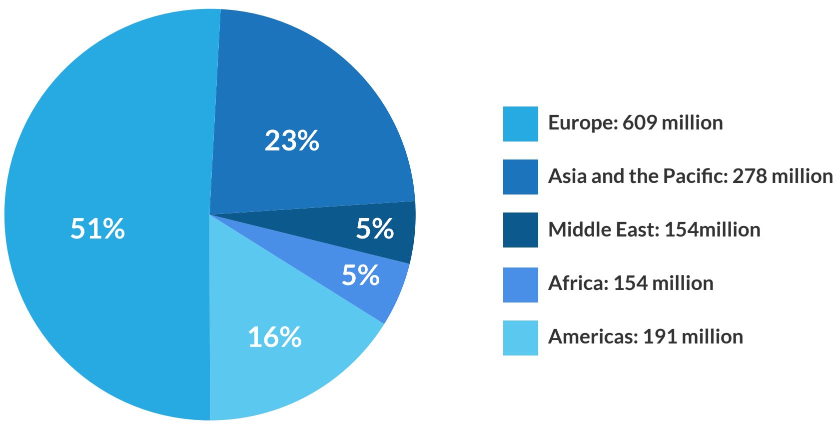
These trends provide a very positive future business potential scenario for Myanmar's tourist guide sector which currently numbers almost 6,000 national and regional licensed tourist guides (More details on tourist guide numbers are given in Section 1.5.3).

1.5.1 Global tourism

Global tourist arrivals and tourism receipts generated have continued on a long-term growth trend. Across the world, international tourist arrivals in 2015 reached a total of 1,184 million, a 4.4 per cent increase over 2014 (UNWTO, 2016). International tourism receipts earned by destinations worldwide reached US$1.4 trillion[20] in 2015, equivalent to 7 per cent of world exports in 2015. Following the recession in tourism caused by the Global Financial Crisis between 2008 and 2009, this was the sixth consecutive year of above-average growth in global tourism.

Asia and the Pacific remains the world's second largest destination for international tourism (Chart 1) and, overall the region recorded a 5 per cent increase for international visitor arrivals which totaled 278 million in 2015. Destinations within South East Asia collectively recorded a 6 per cent increase between 2014 and 2015.

Chart 1: Global International tourist arrivals, 2015



Source: United Nations World Tourism Organization (2015 International Visitor Arrivals)

20 1 trillion = 1,000 billion

1.5.2 ASEAN tourism

Based on the ASEAN Tourism Statistic Database, cross border tourism within ASEAN nations ("intra-ASEAN") and international arrivals from outside ASEAN member countries ("extra-ASEAN") both continue to grow. The total international visitor arrivals growth for ASEAN destinations increased from over 73 million in 2010 to over 105 million in 2014 (Table 5).

Table 5: Tourist arrivals into ASEAN destinations (in 000s)

Country	2010	2014				
	Intra ASEAN	Extra-ASEAN	Total	Intra-ASEAN	Extra-ASEAN	Total
Brunei Darussalam	109.9	104.4	214.3	3 662.2	223.4	3 885.5
Cambodia	853.2	1 655.1	2 508.3	1 991.9	2 510.9	4 502.8
Indonesia	2 338.5	4 664.4	7 002.9	3 683.6	5 751.6	9 435.4
Lao PDR	1 990.9	522.1	2 513.0	3 224.1	934.5	4 158.7
Malaysia	18 937.2	5 640.0	24 577.2	20 372.8	7 064.5	27 437.3
Myanmar	512.3	279.2	781.5	1 598.3	1 483.2	3 081.4
Philippines	298.2	3 222.3	3 520.5	461.5	4 371.9	4 833.4
Singapore	4 779.6	6 859.0	11 638.7	6 113.0	8 982.1	15 095.2
Thailand	4 534.2	11 402.2	15 936.4	6 620.2	18 159.5	24 779.3
Vietnam	688.7	4 361.1	5 049.9	1 495.1	6 379.2	7 874.3
ASEAN	35 042.8	38 709.8	73 752.0	49 223.0	55 860.8	105 083.8

Note: Details may not add up to totals due to rounding off errors. Prior to 2013, Brunei Darussalam data only covers visitor arrivals by air transport.

Source: ASEAN Tourism Statistic Database[21].

During that four-year period, intra-ASEAN arrivals grew approximately 40 per cent and extra-ASEAN arrivals grew by just over 44 per cent. When comparing to some other ASEAN countries such as Malaysia, Thailand and Singapore, the absolute number of total ASEAN tourist arrivals of Myanmar is still small – representing less than 3 per cent of the total ASEAN international arrivals in 2014; yet, when making a comparison with the number of arrivals between 2010 and 2014, Myanmar had an impressive three-fold increase – exceeding the growth rate of most ASEAN countries.

The primary source markets for international tourism into ASEAN are given in Table 6 below. Arrivals from China have grown substantially in recent years, placing the Chinese outbound market as the largest source for ASEAN tourism, followed by countries from the European Union (EU), Japan, Australia, Korea, USA, India, Taiwan and Russia. The outbound China market visiting ASEAN tends to expand at a faster rate than the second largest market, Europe.

21 Available at http://www.asean.org/storage/2015/11/tourism/Table_28.pdf

Table 6: Major regional sources of visitors into ASEAN

Country of Origin	2014	
	Number of Tourists (Thousands)	Share of total (Per cent)
ASEAN	49 223.0	46.8
China	13 059.5	12.4
European Union 28	9 275.2	8.8
Republic of Korea	5 018.4	4.8
Japan	4 634.2	4.4
Australia	4 383.6	4.2
USA	3 254.3	3.1
India	3 071.0	2.9
Russian Federation	2 377.5	2.3
Taiwan (ROC)	1 920.4	1.8
Top 10 country/regional sources	96 217.0	91.6
Rest of the world	8 866.7	8.4
Total tourist arrivals in ASEAN	**105 083.8**	**100.00**

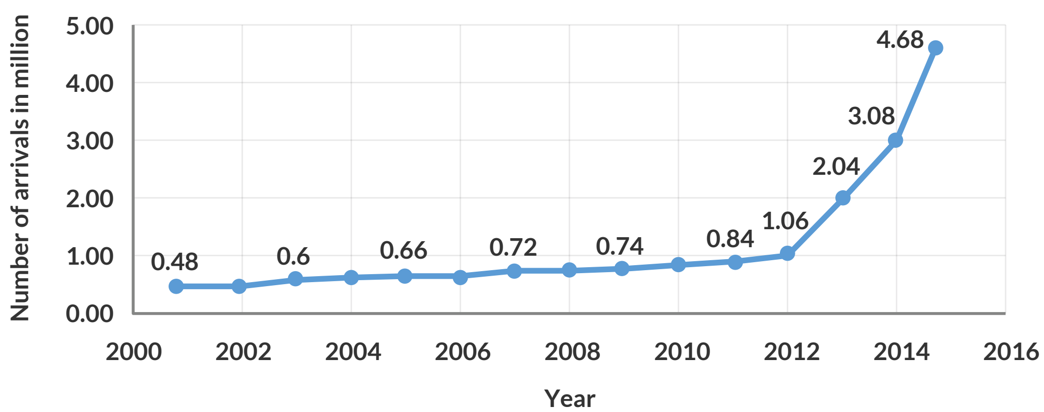
Source: ASEAN Tourism Statistics Database[22]

ASEAN destinations are well positioned to attract a larger share of the international tourism market which is projected to expand from 1.13 billion international arrivals in 2014 to a long-term forecast of 3.3 per cent growth per annum to 1.8 billion in 2030 (UNWTO, 2015). In addition, the International Air Transport Association (IATA) anticipates that while 3.5 billion passengers travelled by air in 2015, the number will have doubled to 7.3 billion by 2034[23]. Along with Africa, the Asia Pacific region is expected to have the highest annual growth rate of air travel passengers (4.9 per cent per annum) until 2034[24].

1.5.3 Myanmar Tourism sector profile

From a relatively small base, over the past four years Myanmar has experienced high rate of growth for international visitor arrivals. MoHT reports that in 2011, Myanmar welcomed 816,369 international arrivals; the number increased to 1.05 million in 2012, doubled to 2.04 million in 2013, and then continued to rise rapidly to 3.08 million in 2014. In 2015, a large increase was reported with 4.68 million international arrivals (Chart 2). This result exceeds the 'high scenario' projections for international visitor arrivals in the MTMP.

Chart 2: International arrivals, 2001-2015



Sources: MoHT and World Bank.[25]

22 Available at http://www.asean.org/storage/2015/11/tourism/Table_29.pdf
23 *IATA Air Passenger Forecast Shows Dip in Long-Term Demand,* press Release No.: 55, 26 November 2015
24 Ibid.
25 Source: http://data.worldbank.org/indicator/ST.INT.ARVL?locations=MM&page=2, (access on 01 August 2016)

The validity of these data on international arrivals into Myanmar is contentious within sections of the local tourism industry, as mentioned in Section 1.1.1. In an article titled ‘Why Myanmar’s tourist numbers don’t add up’[26], it was noted that Myanmar’s tourist arrivals increased sharply when border arrivals from India, Bangladesh and Lao PDR were counted alongside those from China and Thailand, and that about two-thirds of international arrivals are actually same-day visitors (excursionists) from neighbouring countries and not overnight visitors using commercial accommodation. Under this circumstance, the number of ‘genuine’ tourists increased in recent years may not necessarily be as high as reported by the MoHT. An alternative means to look into the number of ‘genuine’ tourists who are most likely to stay in licensed, commercial accommodation, and use the services of a licensed tour operator and/or tourist guide, is to consider tourist entrance sales at key locations such as Shwedagon Pagoda and Inle Lake along with data from the Pacific Asia Travel Association[27] which excludes same-day visitors at border crossings but includes arrivals by air/land/sea ports at Yangon, Mandalay, Bagan and Nay Pyi Taw.

There is a need to improve the technical capacity of government agencies to provide more accurate and timely statistics that meet international standards. One of the six strategic programmes recommended in the MTMP was “to strengthen the institutional environment”, which indicated the importance of “strengthen[ing] tourism information systems and metrics”.[28] This STED report also makes recommendations on the training needs for Myanmar to work towards a formal tourism satellite accounting (TSA) system (Refer to Section 4).

Nevertheless, based on the available information provided by the MoHT, Asian markets, particularly Thailand and China, dominated international arrival data for Myanmar between 2012 and 2015 inclusive (Table 7). In 2012, source markets within Asia accounted for 64.11 per cent of total international arrivals; this rose to 70.03 per cent in 2013, to 71.39 per cent in 2014, and then reached 72.1 per cent – almost three-quarters of the international arrivals in 2015. There has been little change in the rankings of the source markets during the same period.

Western Europe provided the second major source market region, with France, UK, and Germany as the top 3 source markets within the region. North America contributed 6.6 per cent of the international arrivals in 2014 and 6.44 per cent in 2015, followed by Oceania. Small markets which contributed less than 1 per cent of total international arrivals in both 2014 and 2015 included Russia and countries in the Middle East and Africa.

The MoHT reports that total international arrivals into Myanmar via Myanmar’s largest international gateway –Yangon Border Entry point increased by 158,601 persons or 15.5 per cent in 2015 over 2014 (Table 8). While there was a 4.8 per cent increase in the number of people arriving via Yangon on packaged tours in 2015 compared to 2014, the number of foreign independent travellers (FIT) decreased by 9.3 per cent and business visitors also decreased by 7 per cent. Social visitors increased 7.5 per cent and the category ‘Others’ in Table 6 recorded the largest increase of 70 per cent.

As indicated in Table 8, in 2014, the ‘Others’ category represented one-quarter of all arrivals via Yangon and this ratio increased to almost 40 per cent in 2015. The MoHT did not specify the purpose-of-visit of the “others” group, but it is apparently excluded from the major purpose-of-visit groups (holiday, business or visiting friends or relatives). Enquiries to the MoHT revealed that the “Others” category included inbound travellers and their partners or families who were on diplomatic visas, and also those whose purpose was convention travel. According to common international practice, convention (or meetings) visitors are categorized as business travellers – if this were applied to Myanmar, the percentage of “Business Travellers” in 2015 would be significantly higher than 15 per cent.

The majority of international arrivals were recorded in the five main “Border Gateways” (Table 9). The MoHT data shows a significant increase of international arrivals via these border gateways over the past two years with an additional 1,429,649 recorded in 2015 over 2014 (73.3 per cent increase). In 2015, international arrivals via ‘Border Gateways’ represented 72 per cent of all international arrivals into Myanmar. However, many among these “border gateway” arrivals would not be holiday visitors who might stay at least one night in a licensed commercial accommodation and at some stage use the services of a licensed tourist guide.

26 Ei Ei Thu & T. Kean, “Why Myanmar’s tourist numbers don’t add up” in Myanmar Times (Yangon), 19 Jan 2015 http://www.mmtimes.com/index.php/in-depth/12828-why-myanmar-s-tourist-numbers-don-t-add-up.html, (access on 01 August 2016)

27 The Pacific Asia Travel Association is a non-profit travel trade association serving government tourism offices, hotels, airlines, and other travel-related companies in Asia Pacific. The Association produces research products such as Annual Tourism Monitor and Asia Pacific Visitor Forecasts. Its online portal is www.pata.org.

28 Myanmar Tourism Master Plan (2013-2020), Strategic Programs (page 31): ‘Strengthen the institutional environment’, Recommendation 3.1: Strengthen tourism information systems and metrics

Table 7: International tourist source markets to Myanmar 2012-2015

International Visitors Arrival								
Region/ Country	2012		2013		2014		2015	
	# of Visitors	%	# of Visitors	%	# of Visitors	%	# of Visitors	%
Asia	**380 404**	**64.11**	**630 399**	**70.03**	**807 806**	**71.39**	**938 487**	**72.10**
Thailand	94 342	15.90	139 770	15.53	198 229	17.52	204 539	15.71
China	70 805	11.93	90 550	10.06	125 609	11.10	147 977	11.37
Japan	47 690	8.04	68 761	7.64	83 434	7.37	90 312	6.94
Korea	34 805	5.87	54 934	6.10	58 472	5.17	63 715	4.90
Singapore	26 296	4.43	39 758	4.42	47 692	4.21	45 125	3.47
Malaysia	30 499	5.14	39 140	4.35	46 534	4.11	40 852	3.14
Taiwan	22 060	3.72	30 669	3.41	32 664	2.89	31 735	2.44
India	16 868	2.84	21 042	2.34	32 306	2.85	34 628	2.66
Hong Kong	4 826	0.81	7 874	0.87	8 522	0.75	4 237	0.33
Bangladesh	1 737	0.29	1 981	0.22	3 654	0.34	2 913	0.22
Other	**30 476**	**5.14**	**135 890**	**15.10**	**170 690**	**15.08**	**272 454**	**20.930**
West Europe	**130 296**	**21.96**	**158 163**	**17.57**	**186 828**	**16.51**	**209 300**	**16.08**
France	30 064	5.07	35 462	3.94	41 453	3.66	47 435	3.64
UK	24 296	4.09	33 203	3.69	40 921	3.62	45 120	3.47
Germany	23 063	3.89	27 712	3.08	32 265	2.85	35 727	2.74
Italy	10 830	1.83	11 728	1.30	12 613	1.11	14 841	1.14
Switzerland	8 043	1.35	9 547	1.06	11 267	1.00	12 293	0.94
Spain	6 688	1.13	5 588	0.62	7 955	0.70	9 158	0.70
Belgium	4 627	0.78	5 946	0.66	6 252	0.55	6 666	0.51
Austria	3 489	0.59	3 959	0.44	4 022	0.36	4 398	0.34
Other	**19 205**	**3.23**	**25 018**	**2.78**	**30 080**	**2.66**	**33 662**	**2.59**
North America	**44 074**	**7.43**	**62 628**	**6.96**	**74 899**	**6.62**	**83 866**	**6.44**
America	37 589	6.34	53 653	5.96	62 631	5.54	69 815	5.36
Canada	6 485	1.09	8 975	1.00	12 268	1.08	14 051	1.08
Oceania	20 650	3.48	28 079	3.12	33 421	2.95	35 566	2.73
Australia	18 261	3.08	24 718	2.75	29 175	2.58	30 820	2.37
New Zealand	2 342	0.39	3 318	0.37	4 090	0.36	4 547	0.34
Other	**47**	**0.01**	**43**	**0.00**	**156**	**0.01**	**199**	**0.02**
East Europe	**9 077**	**1.53**	**10 183**	**1.13**	**13 592**	**1.20**	**15 433**	**1.19**
Russia	3 749	0.63	4 117	0.46	4 835	0.43	4 138	0.32
Other	5 328	0.90	6 066	0.67	8 757	0.77	11 295	0.09
Other America	3 535	0.60	4 625	0.51	7 043	0.62	9 576	0.74
Middle East	3 747	0.63	3 396	0.38	4 714	0.42	5 527	0.42
Africa	1 598	0.26	2 688	0.30	3 321	0.29	3 829	0.29
Total	**593 381**	**100.00**	**900 161**	**100.0**	**1 131 624**	**100.00**	**1 301 583**	**100.00**

Note: Even taking into account 'rounding up or down', the figures noted above in gray indicate inconsistencies in data supplied by MoHT. This highlights the need for further investment in building the capacity of MoHT and other government agencies to provide reliable tourist arrival data.

Source: MoHT, consolidated by the author

Table 8: International arrivals via Yangon Border Entry point (2014 - 2015)

Category	2014 (% rounded up/down)		2015 (% rounded up/down)	
Packaged Tours	179 823	22%	188 466	16%
Foreign Independent Travellers (FIT)	338 199	30%	306 570	26%
Business Travellers	186 239	19%	173 004	15%
Social Visitors/Visit Friends & Relatives (VFR)	45 974	4%	49 444	4%
Others	271 846	25%	463 198	39%
Total	**1 022 081**	**100%**	**1 180 682**	**100%**

Source: MoHT

Table 9: International arrivals at Border Gateways, 2014-2015

Border Gateway	2014	2015
North Eastern Region	304 790	674 901
North Western Region	29 811	25 064
Eastern Region	1 267 710	2 220 410
South Eastern Region	305 142	389 323
Northern Region	42 335	69 739
Total	**1 949 788**	**3 379 437**

Source: MoHT

To estimate the number of 'genuine tourists' whose primary purpose of visit is for holiday, and accordingly might use the services of a licensed tourist guide, the following comments and assumptions are made. There is no MoHT data on purpose-of-visit for the 'Border Gateway' entries, but that category represents almost three quarters of all international arrivals. Anecdotal evidence from the STED Survey indicates that some would undoubtedly be international visitors whose primary purpose is for holiday and who would at some time employ the services of a licensed tourist guide, but there is no reliable data available to reasonably estimate how many of them actually employ a tourist guide. For the purposes of the analysis below, it is assumed that "Border Gateways" represent a higher level of foreign independent travellers (FIT), Business Travellers and visiting friends and relatives (VFR) travellers than visitors on package tours.

1.5.4 Myanmar Tourist guide sector

The MoHT advises that in 2014 there were a total of 4,846 national and regional licensed tourist guides in Myanmar. This expanded 16.2 per cent to reach 5,630 in 2015 (Table 10). Almost 33 per cent of licensed guides in 2015 were regional (compared with 22 per cent of the total in 2014). This growth trend has continued with MoHT reporting a total of 6,308 licensed tourist guides around May 2016.

English-speaking guides are the main category serving the tourist guides market, although the share reported dropped from 47.3 per cent of the total in 2014 to 41.7 per cent in 2015.

While not all licensed tourist guides are members of the MTGA – a voluntary membership-based organization, the MTGA reports a membership of over 1,400 which is estimated to be between one-quarter and one-third of all licensed tourist guides.

Table 10: Number of licensed tourist guides by language specialization, 2014-2015

Language	2014	2015
English	2 296	2 349
Japanese	384	352
French	282	278
German	268	261
Thai	138	150
Chinese	131	123
Spanish	110	106
Russian	69	66
Italian	68	64
Korean	30	26
Regional Guides	1 070	1 855
Total	**4 846**	**5 630**

Source: MoHT

1.6 Value Chains

In tourism, a value chain comprises numerous components including accommodation, food and beverages, catering services, food production, land/air/marine transportation services, short duration and longer excursions, various entertainment options, crafts and handicrafts, waste disposal as well as a wide range of necessary supporting infrastructure. In order for the tourism system to function efficiently in the destination, these many components combine to form the product a tourist purchases as a holiday.

The tourism value chain covers all parts of the process to produce a tourism product (or experience). It involves many goods and services provided by different suppliers who are contracted by different organizations within the tourism system. These goods and services can be directly or indirectly related to the final tourism product. Tapper & Font (2015) note "tour operators contract suppliers for some of these components [of a tourism product] directly. Others are obtained by suppliers and their suppliers. All suppliers providing component goods and services that go into delivery of a tourism product are part of the supply chain for that product."

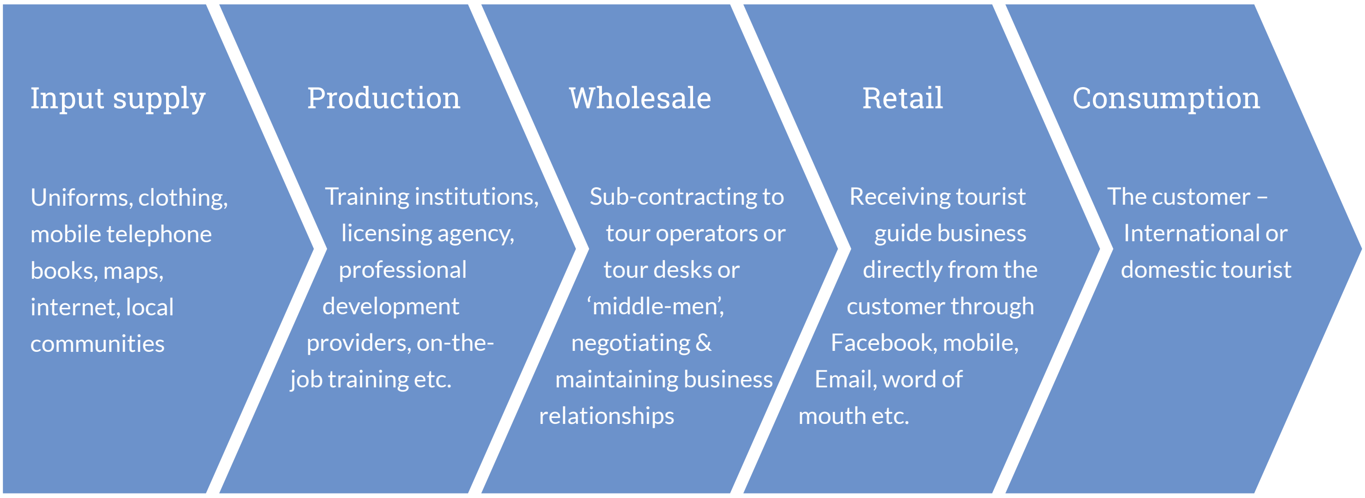
The STED Survey has illustrated that most business for individual tourist guides comes from tour operators with offices within Myanmar. In general, tourist guide services are a component of the services that go into the delivery of the tour operators supply chain for the packaged product they offer in the marketplace. The Survey confirmed that the business of a tourist guide in Myanmar is generally a micro business as unincorporated sole trader. Most of their business comes as subcontractors to tour operators. Only a small number of professionals, who are mainly senior tourist guides, have full time employment with tour operators operating at a larger scale.

Applying a framework such as value chain analysis (VCA) is an economic analytic approach that has limitations when dealing with a micro economic evaluation such as an individual tourist guiding business. While there is a considerable amount of tourism value chain work done at sector level and destination level, there are relatively few examples of work by researchers and practitioners around the world to apply VCA to the individual tourism business level.

One such piece of work which the authors claim as "[...] a methodological advance by showing how a VCA can be applied at the level of the individual tourism enterprise" was published by Mitchell, Font & Li (2015), in which they applied the VCA approach to a large, 1,000 room hotel in Turkey. Of interest to the tourist guide sector, their research found there were critical roles of specific linkages in determining who received what economic benefits. The results of this VCA research indicated that factors such as level of tourist discretionary spending, contracting policies and practices between tour operators and tourist guides will influence the local economic impact of tourist guide services.

Drawing on the above-mentioned VCA model, a value chain model for the Myanmar tourist guide sector was developed as shown in Diagram 3 below. It consolidates a range of different types of supplies that are considered essential for a tourist guide to operate appropriately and competitively. For instance, mobile telephone is part of the input supplies for a tourist guide to connect and communicate with the clients, and a training institution is part of production supplies to ensure a guide obtains the appropriate qualifications to conduct the guiding services.

Diagram 3: Value chain model for tourist guides in Myanmar



Note: This VCA model was developed by the author Steve Noakes and ILO Technical Officer Qingrui Huang during the STED Survey and assessment and was validated by the national stakeholders.
Source: Noakes & Huang

Each segment along the value chain above entails some key factors that could catalyze export competiveness and the creation of productive employment, These factors are outlined below, it is important to note that the effectiveness of these factors is highly dependent on the improvement of relevant skills and competencies:

Segment	Factors contributing to export competitiveness/employment
Input supply	Use local communities (urban and rural) as a source of tourist guides with relevant local knowledge (cultural, spiritual, history/heritage, environmental). Access to knowledge and skills with hand-held communications technologies, including continuous training on new and creative ways to use social media to remain connected to past customers and identify potential new customers. Manage relationships with tour operators and others who are current sources of business for tourist guides. Conduct research to increase knowledge about local history, heritage, culture, politics, natural landscapes, biodiversity, and ethnic groups, etc. Develop and manage membership-based national or regional associations of tourist guides for a range of representation, advocacy and networking purposes.
Production	Address key issues relating to quality and qualifications of tourist guide, i.e. skills standards, institutional capacity building (e.g. NSSA, MTGA, UMTA), alignment with ASEAN MRA, on-the-job training, etc.

Wholesale	Capacity and skills of tour operators in expanding international markets to attract more customers who would need tourist guides for various packages. Negotiate terms and conditions as a sub-contractor to a tour operator or some other 'middle-man'. Manage and maintain business relationships with tour operators.
Retail	Skills of tourist guides on 'what to do' and 'how to do' to remain connected with past customers and to solicit new customers directly. Skills of tourist guides to manage business relationships. A typical example is if a tour operator gives a guide business and then that guide goes direct to the client (and thus the tour operator loses business from that source), the tourist guide needs to know how to assess and handle such situations if she or he wishes to maintain good relationships with the tour operator. Skills of tourist guides to enhance retail selling, especially in newly developing tourist locations within Myanmar.
Consumption	Satisfaction of a customer to determine the quality of a tourist guide service product. In selecting a guide or tour operator, certain recognized qualifications (e.g. a sustainable tourism certification label) of the guide and/or operator could be used to reassure customers that service delivery quality standards can be expected.

1.7 Firm Level Characteristics

The STED survey shows that tourist guides in Myanmar primarily operate as individuals, effectively as 'sole traders' and as unincorporated legal entities. There is little job security for tourist guides in Myanmar and the income they receive for their professional services is very seasonal in nature and they largely act as 'on-demand' sub-contractors to tour operators.

According to the Survey, a small minority of tourist guides is employed full time with tour operators. Although there are a number of foreign owned tour operators, most are locally based companies and are members of UMTA. Guides fund their own education and resources required to undertake the required training and licensing to be employed as a tourist guide in either a casual/part-time/contractor capacity, or as full time employee.

Guides work in many segments of the tourism industry. To gain an appreciation of those different segments and the relative scale of each segment, the following Tables (11 to 14) document what MoHT has captured and reported over the past four years at the firm level (working enterprises) in the tourism sector from a range of land, air and water based transport services as well as the capacity of the country's commercial accommodation sector.

Table 11 indicates the number of international tourists received by different types of tourism enterprises offering specialized tour products between 2012 and 2015. Almost all types of business showed an upward trend except the 'special charter flights'. As there is no additional data available with respect to any types of services (e.g. tourist guiding) provided for these tourists, some assumptions were made based on vis-à-vis discussions with tour operators and tourist guides during the assessment period.

- The number of passengers on riverine cruises has increased dramatically over the past four years, with 14,635 in 2012, rising to 20,816 in 2015. More significantly, the income recorded on those cruises increased almost three times (274%) from US$2,341,315 in 2012 to US$8,751,254 in 2015. There is no specific data available on the number of people who undertake riverine cruises and use the services of a licensed tourist guide, although it is reasonable to assume a majority of such customers would use a tourist guide if and when undertaking any off-shore excursions.
- While there was a large 82 per cent increase in the number of special charter flights recorded in 2015 compared to 2014, the actual number of passengers decreased 23.7 per cent to 2,635, which was lower than passenger arrivals by similar transport in both 2013 and 2012. There is no data available to illustrate

how many international tourists using special charter flights actually also employ a licensed tourist guide at one or more locations during their time in Myanmar. However, for those whose primary purpose of travel was for a holiday, it can be assumed a tourist guide was engaged at some stage.

- There had been a significant increase in tourist arrivals by ocean cruises over the four-year period. From single-digit vessel arrivals in 2012 and 2013, the number of cruise ships arriving in 2015 increased to 26 in 2015 representing a 44.4 per cent growth. A similar 44 per cent increase was also seen in the number of passengers on those ships from 2014 to 2015. While there is no specific data available, cruise ship passengers who undertake an off-ship excursion are most likely to have used the services of a licensed tourist guide.
- The number of cruising yachts visiting Myanmar increased substantially from 1,158 in 2012 to 3,248 in 2015. From a relatively small base, the entry approval income experienced three consecutive increases between 2012 and 2015. There is no specific data available on the number of people who have arrived into Myanmar on cruising yachts and used the services of a licensed tourist guide.
- The commercial balloon ride had led a dramatic increase in the number of customers as well as the amount of income over the four-year period. For instance, in 2015 there was over a 33 per cent increase in the number of passengers taking a balloon tour comparing with that of 2014; it represented over a 52 per cent increase in income. There is no available data on how many of those customers who have purchased a commercial balloon trip have also used the services of a licensed tourist guide.

Table 11: Type of tourism enterprise offering specialized tourism products, 2012-2015

Type of tourism enterprise	2012		2013		2014		2015	
	Number	Passengers	Number	Passengers	Number	Passengers	Number	Passengers
Special charter flight tours	23	2 760	30	4 081	28	3 453	51	2 635
Tourist arrivals by Oceania cruises	9	2 932	8	6 408	18	18 611	26	26 776
	Passengers	Income in US$	Passengers	Income in US$	Passengers	Income in US$	Passengers	Income in US$
Yachting tours	1 158	155 392	2 175	257 051	2 562	387 462	3 248	468 239
Riverine cruises	14 635	2 341 315	15 809	4 906 305	18 077	8 416 289	20 816	8 751 254
Ballooning	8 024	1 979 014	11 362	3 109 806	17 802	4 231 342	23 719	6 436 866

No.= Number
Source: MoHT

In terms of licensed tourist transportation (Table 12), MoHT data indicates a substantial 145 per cent increase in the total number of licensed services from 2012 to 2015. The major growth has occurred in land-based forms of motorised transport. It is reasonable to assume that more jobs would have been generated for drivers and for the range of support services needed to maintain vehicles suitable for commercial tourist use.

Table 12: Licensed tourist transportation services, 2012-2015

Transportation services with MoHT license	2012	2013	2014	2015
Coach (26-50 seater)	61	6	129	208
Mini bus (13-25 seater)	27	24	30	60
HiAce/Townace (5-12 seater)	16	17	31	69
Salon/Van (4seater)	23	17	18	39
Motor boat	22	46	55	30
Boat	17	29	24	30
Yacht	31	15	21	21
Hot Air Balloon	1	1	2	3
Total	**198**	**201**	**310**	**486**

Source: MoHT

In 2015, the total number of tour companies licensed by MoHT increased by 90 per cent from the base year of 2012 (Table 13). The major increase was seen in the number of new local tour companies commencing licensed operations (19.9 per cent increase). Over the four-year period, there had also been a doubling in the number of joint venture companies receiving a tour company license. Between 2012 and 2015, just one foreign company was listed as a 'Licensed Tour Company'.

Table 13: Licensed Tour Companies by business ownership, 2012-2015

	2012	2013	2014	2015
Local company	1 008	1 324	1 589	1 906
Joint Venture Company	17	25	33	39
Foreign company	1	1	1	1
Total	**1 026**	**1 350**	**1 623**	**1 946**

Source: MoHT

Between 2012 and 2015, the number of licensed hotels/motels/guest houses increased 62.5 per cent. For the same period, the number of rooms available increased 76.5 per cent from just over 28,000 to almost 50,000 (Table 14). It is worth mentioning that from 2014 to 2015 there was a 15.6 per cent increase in the number of licensed hotels/motels/guest houses, while the increase in room capacity was at 15.5 per cent.

Table 14: Commercial accommodation licensed by MoHT, 2012-2015

	2012		2013		2014		2015	
Accommodation type	Number	Rooms	Number	Rooms	Number	Rooms	Number	Rooms
Hotels/Motels/Guest houses	787	28 291	932	34 834	1 106	43 243	1 279	49 946

Source: MoHT

1.8 Sectoral definitions

The review undertaken of relevant literature on the tourist guides sector indicated that there was a lack of clarity and consistency in the definitions of the sector used by different institutions in Myanmar. This section provides an overview on the context and current situation in this regard.

Tourist guides are identified as a key component of the national tourism industry in the draft Tourism Business Law. Under Chapter 1, Section 2, Subsection F, it identifies that "Tourism Business includes tourist accommodation business, tourist transport business, tour operator business, travel agency and other related services, and tourist guide business." Further, the draft Law provides a specific definition on "tourist guide" in Subsection I of Section 2: "Tourist guide means a person who is providing direction and commentary on tourist attractions for commercial purposes to ensure convenience of tourists throughout the trip."

There has been a very fragmented approach to the development of categorizations of tourist guide occupations amongst various Myanmar institutions. Even within the Ministry of Labour, Immigration and Population (MoLIP)[29] and NSSA, which are the main responsible bodies for occupation categorization, many staff were not familiar with the Myanmar Standard Classification of Occupations (MSCO) for tourist guides, and there no evidence was seen that any public or private sector group outside the MoLIP and NSSA had any knowledge of the MSCO Unit Group and Occupation Group for Guides.

In this light, there is an increased interest within Myanmar to consider updating the MSCO and aligning it with the guidelines available from the International Standard Classification of Occupations (ISCO)[30]. The ISCO is structured around four levels of classification and represented by codes of one to four digits[31]. It belongs to the international family of economic and social classifications, providing a tool for organizing jobs into a clearly defined set of groups according to the tasks and duties undertaken in the job. Apart from being a basis for the international reporting, comparison and exchange of statistical and administrative data about occupations, it also provides a model for the development of national and regional classifications of occupations and a system that can be used directly in countries that have not developed their own national classifications.[32]

As an example – the ISCO Groups relating to "tourist guides" are shown below. In the ISCO structure, "Tourist Guide" is included as an example of the occupations classified under "Travel Guides" coded 5113. (Refer to Appendix 2 for more information).

Major Group	5	Services and Sales Workers
Sub-major Group	51	Personal Services Workers
Minor Group	511	Travel Attendants, Conductors and Guides
Unit Groups	5111	Travel Attendants and Travel Stewards
	5112	Transport Conductors
	5113	Travel Guides

The Myanmar Standard Classification of Occupations (MSCO 2003) on the other hand has a five-digit classification system with different terminology to ISCO. It has more specific detail in relation to tourist guides under the Major Group category "Service Worker".

Major Group	5	Service Worker
Minor Group	5-9	Service Workers not elsewhere classified
Unit Group	5-91	Guides
Occupation Group	5-91-01	Travel Guide/ Tour Guide
	5-91-02	Sightseeing Guide
	5-91-03	Mountain Guide
	5-91-04	Hunting Guide
	5-91-05	Study Guide
	5-91-99	Other Guides

29 Ministry of Labor, Immigration and Population (MoLIP) was transformed from the Ministry of Labor, Employment and Social Security (MoLES) after the 2016 Presidential Election.

30 ILO, International Standard Classification of Occupations, Volume 1: ISCO-08, Geneva, 2012

31 The four groups are: Major Group, Sub-major Group, Minor Group and Unit Groups

32 http://www.ilo.org/public/english/bureau/stat/isco/

MSCO provides the following occupation descriptions:

5-91-01	Travel Guide/ Tour Guide: Escorts and guides individuals or groups of individuals during trip. May arrange transport and accommodation.
5-91-02	Sightseeing Guide: Escorts and guides tourist or group of tourists around the city or town. Describes points of interest. May arrange transportation and accommodation.
5-91-03	Mountain Guide: Leads party of mountain climbing expedition guiding site of ascent and camping.
5-91-04	Hunting Guide: Escorts and guides hunting trip to best camping and hunting areas. Assists in planning route of best hunting sites.
5-91-05	Study Guide: Instructs and guides individuals or groups of individuals in learning their lessons.
5-91-99	Other Guides: Include those not elsewhere classified in this unit group.

1.9 Sectoral Employment

According to the MHRDSAP, the tourism sector is expected to provide over two million new jobs by 2020, of which roughly 1.5 million are expected to be direct employment opportunities, and the rest would be generated through supply chains.

The MHRDSAP also suggests that by 2030 it is likely that Myanmar will be receiving approximately 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 jobs. There are no reliable data on how many national and regional tourists guide license holders are employed in full time or casual/contract employment in Myanmar.

1.10 Institutional Mechanisms

This sub-section addresses institutional mechanisms and linkages relevant to tourist guides.

1.10.1 Employers and Workers Associations

The formation of the Myanmar Tourism Federation (MTF) in 2012 provided a 'single-voice', top-down structure for tourism and travel related industry organizations (See Section 1.4). In relation to tourist guides, of the eleven member organizations of MTF, the two most relevant ones are the MTGA which represents 'the workers', and UMTA which represents 'the employers'. UMTA was formed under the supervision of the MoHT in 2002 and is evolving into a more independent voice for private sector travel agencies, tour operators and travel related businesses. Both MTGA and UMTA have dedicated committees for human resources issues, which include addressing the skills development needs of industry. Additionally, as part of the current MTF structure, the MTHRDA also takes an active interest in the skills development needs of the overall tourism sector, particularly the hospitality sector.

As these tourism sector associations gain more experience and confidence as forums for their memberships, there is increasing dialogue within Myanmar about the future role of the MTF and what alternative national structures are might be better suited for the collective advocacy and representation needs of the specialist industry sector associations. The industry sector associations are seeking a more democratic, bottom-up approach to any future national organization or network that represents their collective interests.

1.10.2 Government sector

Within the MoHT, the Directorate of Hotels and Tourism includes the Department for Training and Education, which, among its responsibilities, is addressing the implementation of Strategic Program 2: Build Human Resource Capacity and Promote Service Quality from the MTMP. The Training and Education Department is responsible for conducting tourist guide training programmes at both national and regional levels. The Hotel and Tourism Supervision Department is responsible for issuing Guide Licenses. Within Myanmar's TVET system, there is a lack of capacity to deliver accredited tourism and hospitality training programmes, and as a result, MoHT also responds to requests for specific short course training.

The NSSA was established in 2007 as part of the reform process for the technical and vocational education and training (TVET) system which lacked appropriate legal and institutional foundations. The NSSA is responsible for developing national occupational standards, and for testing and certifying the skills acquired by vocational students. Together with some other key institutions, the NSSA also aims to address the national desire to have a Myanmar Qualifications Framework (Table 15) guided by the ASEAN Qualifications Recognition Framework (AQRF) that aims to enable comparisons of qualifications of skilled labour across ASEAN Member States, and to support the mobility of students and professionals as the ASEAN economic integration process continues.

Table 15: Myanmar Qualifications Framework

<table>
<tr><th rowspan="2">Level</th><th colspan="3">Sectors</th><th rowspan="5">Lifelong Learning</th></tr>
<tr><th>Basic Education</th><th>Technical & Vocational Education & Training TVET</th><th>Higher Education</th></tr>
<tr><td>8</td><td></td><td></td><td>Doctoral Degree</td></tr>
<tr><td rowspan="2">7</td><td rowspan="2" colspan="2"></td><td>Masters Degree</td></tr>
<tr><td>Post Graduate Diploma</td></tr>
<tr><td>6</td><td></td><td>Degree</td><td>Bachelors Degree</td><td rowspan="7">Recognition of Prior Learning life (assessment & Validation)</td></tr>
<tr><td rowspan="2">5</td><td rowspan="2"></td><td>Advanced Diploma</td><td>Associate Degree</td></tr>
<tr><td>Diploma</td><td>Diploma</td></tr>
<tr><td>4</td><td></td><td>*V&T C/SC 4</td><td></td></tr>
<tr><td>3</td><td></td><td>V&T C/SC 3</td><td></td></tr>
<tr><td>2</td><td>High School</td><td>V&T C/SC 2</td><td></td></tr>
<tr><td>1</td><td>Middle School / Primary School</td><td>V&T C/SC 1</td><td></td></tr>
</table>

Note: V&T-Vocational and Technical Certificate
SC - Skills Certificate
Source: NSSA

For skills standards development and training as well as skills assessment and certification, NSSA has established a number of sectoral sub-committees to enable engagement with industry stakeholders. This includes the NSSA Tourism and Hospitality sub-committee which engages with industry groups such as MTGA, UMTA and MTHRDA. Research undertaken within this STED project confirms the need for more industry and government awareness about the roles and responsibilities of the NSSA due to the lack of agreement between industry and NSSA on the desirable tourist guide qualifications categories and competency standards, as well as the lack of effective ASEAN compliant institutions within NSSA such as the National Tourism Professionals Board (NTPB) and the Tourism Professional Certification Board (TPCB).

Chapter 2: Business Environment

This Section gives an overall analysis on the current capabilities that the businesses in the tourism sector possess, particularly tour operators and tourist guides; meanwhile, it identifies the capability gaps for these businesses to perform better in order to underpin their future competitiveness. The strengths, weaknesses, opportunities and threatens highlighted in this Section also provides good strategic guidance for identifying further skills development demands and priorities.

2.1 Industry Competitive Analysis

2.1.1 Competitiveness of Myanmar's tourism industry

Myanmar has now become another destination competing for international tourists, as well as competing for investments in new tourism related infrastructure and services.

There are two well-recognized international rankings which assist in understanding a nation's competitiveness in the tourism sector, one is provided by the World Economic Forum (WEF) and the other provided by the World Travel and Tourism Council (WTTC).

WEF produces the annual Travel & Tourism Competitiveness Report since 2007 which measures the set of factors and policies that enable the sustainable development of the T&T sector in a country. The competitiveness is measured by a spectrum of index clustered into four main sub-indices: enabling environment, travel and tourism policy and enabling conditions, infrastructure, as well as natural and cultural resources. 14 key travel and tourism related issues, e.g. business environment, safety and security, health and hygiene, human resources and labour market and ICT readiness, etc. are expressed as main pillars under these four sub-indices. Myanmar was ranked 134 (WEF, 2015) out of 141 economies in 2015. This rank also placed Myanmar in the bottom among the 15 countries from the Southeast and Southern Asia region. The top three in this region were Singapore, Malaysia and Thailand. The overall scoring of Myanmar reflects that the country is still mostly in the early stages of tourism development and strongly connected with more general and longstanding development challenges, including IT readiness, international openness, infrastructure as well as cultural resources and business travel, among others[33]. These remain important hurdles to attracting international tourists.

33 According to the Travel & Tourism Competitiveness Index in detail Myanmar released in WEC report, Cultural Resources and Business Travel, ICT Readiness, International Openness, and Infrastructure (Air Transport, Ground and Port, and Tourism Services) received lower scores in the 14 indicator pillars: more information available at http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf, p257

The WTTC publishes the annual Travel & Tourism Economic Impact Report which quantifies the economic impact, particularly direct and indirect contribution of T&T sector across the globe. The direct contribution reflects "the 'internal' spending on travel and tourism – total spending within a particular country on travel and tourism by residents and non-residents for business and leisure purposes, as well as government 'individual' spending – spending by government on travel and tourism services directly linked to visitors (WTTC, 2016). The indirect contribution on the other hand, refers to GDP and jobs supported by the spending of those who are directly or indirectly employed by the travel and tourism sector. The 2016 Report ranked Myanmar the 92th among the total 184 countries (ibid) in terms of travel and tourism's "absolute contribution" to GDP. When it comes to T&T's "absolute contribution" to employment, Myanmar had a more impressive performance – it reached a ranking of 32 (ibid).

The WTTC report also provides a 10-year forecast (2016-2026) on the sector's potential for long-term growth and the continued vital contribution to the economic strength and social development of the world. In this forecast, Myanmar was ranked significantly at the second place in the world in terms total contribution to GDP, and 17th for total contribution to employment.

2.1.2 Myanmar's Tourist Guides and destination competitiveness

Destination competiveness depends on more than economic and visitor arrival metrics. As illustrated above, factors affecting a destination's competitiveness may also include pre-visit perceptions (such as the "brand value" of the destination), satisfaction levels during and following the visitor experience in the destination, service performance by local tourism industry suppliers, willingness to recommend the destination to friends and relatives and inclination to make a repeat visit, etc.. Tourist guides play an influential role in ensuring the positive impact generated by these factors, particularly in countries like Myanmar which is experiencing the early stages of engagement in the modern era of international tourism. However, when it comes to support for tourist guides, the enabling environment continues to face competitive constraints such as pervasive government controls, inefficient economic policies, underdeveloped financial systems, corruption and rural poverty.

Under these circumstances, tourist guides have to be self-motivated micro-entrepreneurs if they are to succeed as licensed professionals. As confirmed by the STED Survey, most business for tourist guides comes through contracts with larger scale tour operators. The key challenge for the competent tourist guide is therefore often about establishing and maintaining good working relationships with the key officials within tour operators who are responsible for sub-contracting the guides.

In addition, the guides consulted were also concerned about the risks of losing contract work opportunities and the quality of interpretive service delivery caused by the lack of regulatory enforcement arising from the significant number of unlicensed guides operating in the country, especially guides from China and Thailand.

2.2 Drivers of Change

When peace and stability are in place, there are greater opportunities for any industry, including tourism, to develop to its optimal level. For the economic development and job creation opportunities, the over-riding challenge in the next few years will be to strengthen the ongoing reform process while maintaining stability and the rule of law to delivering tangible benefits to the people of Myanmar.

As a labour-intensive sector, tourist guiding enables new opportunities to undertake a contract or full employment for males and females who might be entering the labour market for the first time or seeking a change of career path. The Myanmar Tourist Guide Policy Framework indicated potential to 'decentralise' and 'deregulate' the delivery of tourist guide training and licensing locations in Myanmar. This would mean a potential to expand the opportunities for suitable Myanmar candidates to undertake national or regional guide training programmes in other strategic locations in addition to Yangon. The potential also exists to deregulate the formal training to allow other non-MoHT government agencies and/or accredited private sector providers to deliver the relevant training, based on common skills standards.

Based on reviewing the literature, the STED Survey and references to consultation with various stakeholders related to tourism development, this report highlights the following key drivers of change:

- The continuation of the national political reform process that has been under way since November 2010. In the case of the MoHT, indications are that the new government which came into power in early 2016 wishes to continue the direction of the current MTMP, along with other associated tourism policy documents that have been produced in the past 3 years or so.
- The draft new Tourism Business Law. There have been suggestions on reviewing the draft law from experts who have worked on Myanmar Tourism issues. One of the main concerns expressed was the lack of policy clarity and consistency in a number of areas, including the tourist guide sector.
- The forthcoming MTHRDAP. This key strategic document sets out Myanmar's vision for tourism human resource development and acknowledges the people-oriented nature of the tourism industry requires appropriate attitude, skill sets and personal attributes of all involved – including tourist guides.
- The continued commitment to the ASEAN integration and cooperation process. This is an area that will require close scrutiny over any major shifts in national policy towards ASEAN integration especially in the area of qualifications framework and skills standards development.
- An effective organization to advocate for change and improvements for the tourist guides. It is necessary to strengthen the resources and capacity of MTGA so that it is able to more effectively engage in dialogue and collaboration with government and industry for the directly and indirectly development impact on the tourist guiding profession.

2.3 SWOT for the tourist guide sector

Respondents to the STED survey overwhelmingly identified the need for either a modest or a large increase in the number of tourist guides right across Myanmar over the next 5 years. Industry and other stakeholders have acknowledged various strengths, weaknesses, opportunities and threats (SWOT) to enable more enrolments of suitable candidates in more formally recognized tourist guide training programmes offered by more accredited organizations in more parts of the country.

Strengths

- Myanmar is realizing the potential from future tourism growth owing to its strategic location in the region and its natural, cultural, social, historical, and heritage tourism attributes.
- Myanmar as a 'new' destination for international tourist markets is attracting more visitors, which also means more demand for tourist guide services.
- The entrepreneurial spirit amongst guides to serve as individual self-motivated service providers is positive.
- As a people-to-people industry, modern technology and machines cannot replace culturally aware guides.
- More attention is being given by Myanmar government and international partners to assist NSSA in further developing the qualification system for tourist guides.

Weaknesses

- Myanmar is still a 'small player' in the tourism sector compared to its ASEAN neighbours which have more mature tourism industry development.
- The industry has very limited understanding about the skills and qualifications system in Myanmar.
- There is a lack of access to formal tourist guide training and licensing. MoHT conducts training for national tourist guides and licensing only in Yangon at the moment. Regional guide training is delivered also by MoHT at the regional/state level but not on a regular basis and usually based on ad-hoc requests from regional or state governments.
- There are seasonal fluctuations in visitor flows resulting in long periods without guide income for licensed guides.

- There is a lack of regulatory enforcement resources to curtail the practices of unlicensed guides.
- International linkages are under-resourced, and there is a lack of awareness of the scope for benefits from more active engagement with the SEATGA and the WFTGA.
- There is a lack of tourism industry experience and understanding across ministries and state/regional government departments responsible for laws/regulations that are relevant to the training, qualifications, licensing and practices of tourist guides.
- For those unlicensed guides with practical experience, the current TVET system lacks the experience and resources that would be required to develop an appropriate skills testing and recognition of prior learning (RPL) mechanism.

Opportunities

- Continued growth in the number of visitor arrivals and tour operators within Myanmar who sub-contract guides is expected.
- The emergence of ASEAN compliant institutions National Tourism Professionals Board (NTPB) and Tourism Professional Certification Board (TPCB) enhances coordination between relevant key stakeholder agencies to move forward the skills and training development for tourist guides in line with ASEAN guidelines.
- There is scope for private sector-led training delivery especially at the state and regional levels to meet the demand for tourist guides particularly in tourism 'hot-spots'.
- More full-time or part-time employment opportunities could be generated for women and men with family responsibilities, for semi-retired or retired people with appropriate skills and qualifications and for some who might be experiencing work transitions.
- Increased access to mobile communications technology (especially via hand-held devices) in Myanmar is facilitating easier B2B communications for guides to solicit new businesses.
- International partners in Myanmar are willing to assist the tourist guide industry to address gaps in a range of policy, planning, practices, education and training needs and institutions.

Threats

- There is a risk of reduction in tourist demand due to any negative reports associated with the political reform process. Tourism works when peace and stability work.
- Government agencies are unable to meet requirements incurred during the development process of tourism (e.g. provision of guide training, licensing, policing of relevant laws/regulations etc.) due to inadequate skill sets and/or insufficient staff.
- There is a lack of resources for the MTGA to function effectively as a membership based organization and the fragmentation of a national tourist guides association.
- There is downward price pressure from tour operators on daily fees for guide services.
- Licensed guides suffer from a loss of contract work, and the quality of interpretive service is affected adversely by unlicensed guides from within Myanmar and from source markets.
- Inflation rates in Myanmar are making the tourism products offered by Myanmar tour operators less cost-competitive within the ASEAN region.

2.4 Gaps in Business Capabilities

In relation to the current and future market needs for tourist guides, the STED Survey noted that as guides cater for visitors from all continents with a wide range of language and cultural diversity, there is a need for appropriate, and often tailored customer service delivery.

The primary source markets for Myanmar tourist guides, according to the STED Survey, are group travel and individual tourists from European markets. While English is the dominant language used between guides and customers, the range of visitors from continental Europe offers opportunities for guides with specific skills in foreign languages from different European nations. Skills in languages from East Asian nations were also seen as beneficial to some members of the tourist guide industry.

As noted earlier, there was a positive assessment of the need for an increase in the total number of tourist guides in the next five years. To achieve this, more enrolments in more formally recognized tourist guide training programmes would be required in more parts of the country. It was perceived by the industry that the greatest demand for more guides are required for the emerging destinations of Hsipaw, Kyaukme and Chin State, followed by the more frequented destinations of Inle Lake and Bagan.

The STED Survey highlighted the market power of tour operators as the main source of employment opportunities for the tourist guides. However, on the other hand, the tour operators surveyed also indicated their desire to have access to high quality tourist guides in order to grow their business through increased packaged tour sales. According to this industry sector, it is still a challenge to find quality guides, especially in the peak seasons.

Myanmar has many experienced tourist guides and tour operators who can articulate from their experience the types of skills a guide should have. The STED survey found that the primary skills required in common are knowledge and interpretation of the culture, heritage and history of the destination. In relation to competencies, the top four expressed by industry are all related to direct contact experiences with customers, namely: English language, customer care/customer service, public speaking and time management. There is however a lack of capacity in the existing Myanmar training system to provide quality training in these competencies that meets industry requirements. Further, although the concept of RPL as a part of the qualification system is still new for Myanmar tourism industry, and is not yet incorporated into any existing qualification mechanisms, those consulted still appreciate the value in having some form of RPL as well as internships in order to gain practical industry experience and future job networks and contacts.

With respect to the gaps between supply and demand, the STED Survey found that the industry had mixed views concerning the future requirements for competencies of graduates and workers that might be provided through the existing training system. Currently, to be a licensed guide, a candidate must complete the training course designed and delivered by the MoHT, which does not lead into any formal qualifications recognized by the NSSA – the leading government body responsible for national skills development including competency standards development, accreditation of public and private providers and evaluators, skills assessment, and certification. On the other hand, most tour operators stated that more often than not, they had to retrain or give additional training to newly appointed or contracted tour guide personnel, largely due to a gap between what the industry requires and what the government departments offer. To close the gap, industry stakeholders consulted indicated their interest in more consultative engagement with government (particularly MoHT and NSSA) in relation to determining appropriate skills levels, competencies and qualifications levels for graduates to meet industry expectations for employment.

2.5 Implications for Types of Skills Needed

Indications from the STED Survey confirm that the existing workforce across the tourism and hospitality sectors is under strain to provide services to meet current and future international tourist market demand. This again validates the findings from the MTMP and the upcoming MTHRDAP. To increase the professionalism of a labour intensive occupation which provides tourist guiding services, the industry stakeholders consulted acknowledge that a better way is to collaborate with the public sector, particularly the NSSA and MoHT. This is not only desirable but also required for the development and strengthening of tourist guide qualifications in all aspects.

More specifically, based on the value chain analysis addressed in Section 1.6, key areas of skills and competencies constraints and weaknesses that need to be strengthened in each component of the supply chain are highlighted as follows:

Input supply	Technology utilization, particularly in relation to business management using social media and to access contemporary information for interpretation purposes. Skills to manage business relationships, especially with tour operators who provide most of the contract work. Research skills to improve the quality of the interpretation delivered to customers. Organizational skills to effectively engage in, and contribute to membership based national or regional associations of tourist guides.
Production	Capacity and resources to engage in the necessary dialogues with government and other stakeholders to have guides' interests effectively represented in the process of developing and strengthening national qualifications.
Wholesale	Myanmar's tour operators will have to be successful in the international marketplace if the volume of business available to tourist guides is to increase. This would require effective partnerships between the public and private sectors.
	Business negotiation skills to negotiate appropriate terms and conditions as a sub-contractor to a tour operator or some other 'middle-man', especially for early career guides.
Retail	Skills to build customer loyalty, especially for early career guides.
Consumption	Myanmar tour operators need to strengthen their capacity to develop and implement quality and/or sustainable tourism standards which are increasingly demanded by international suppliers of packaged tours.

Chapter 3: Envisioning the future

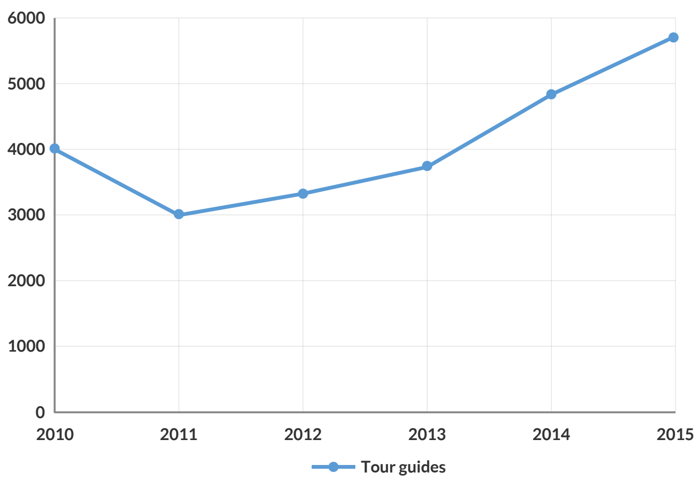
This section anticipates future demand for tourist guides by analyzing recent trends in the number of licensed tourist guides in Myanmar in the context of data on international arrivals, meanwhile making some reasonable assumptions on how many guides can be anticipated to be required. Also, in connection to the results of the anticipation, the section also highlights a range of strategies that are agreed among the stakeholders in order to achieve a better future for the tourist guides sector.

3.1 Future demand for tourist guides

The following assessments are made based on available data from MoHT, which considers both national and regional guides and the specific foreign language they have studied during their formal MoHT guide training programme.

Between 2011 and 2015, after a decrease between 2010 and 2011, an overall 38 per cent growth rate was seen in the number of licensed tourist guides (Chart 3). The growth trend continued with MoHT reporting a total of 6,308 licensed tourist guides after the first four months of 2016. Should the rate of increase in the number of licensed tourist guides between 2011 and 2015 continue for the next five years, the number of licensed guides would be 7,769 by 2020. Based on industry responses during the STED Survey, this figure would be conservative in terms of industry expectations of the future demand for guides.

Chart 3: Number of licensed tourist guides across Myanmar 2011-2015

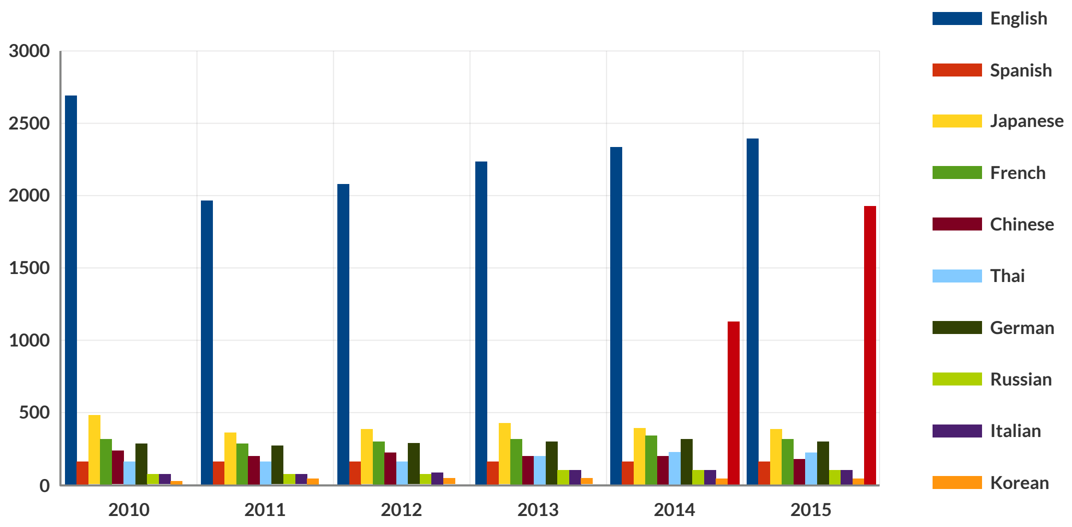


Source: MoHT

Over the same period (2011-2015), the number of international visitor arrivals into Myanmar, as mentioned earlier, has also shown a nearly 6-times increase.

As language specialization is among the most important aspects when analysing the demand for tourist guides, the investigation for this report obtained data from MoHT on the numbers of national guides by their language specialization. As illustrated in Chart 4, English language guides are the most prevalent and well ahead of the next three major foreign languages namely Japanese, French and German between 2010 and 2015. For 2014 and 2015 in particular, MoHT data included a figure for 'Regional Guides' but does not provide a breakdown by their language specialization of those regional guides. For demonstration purpose, the number of regional guides is shown in the final bar for the years 2014 and 2015. (See Appendix 4.1 for detailed data)

Chart 4: Number of Tourist Guides by foreign language specialization 2010-2015

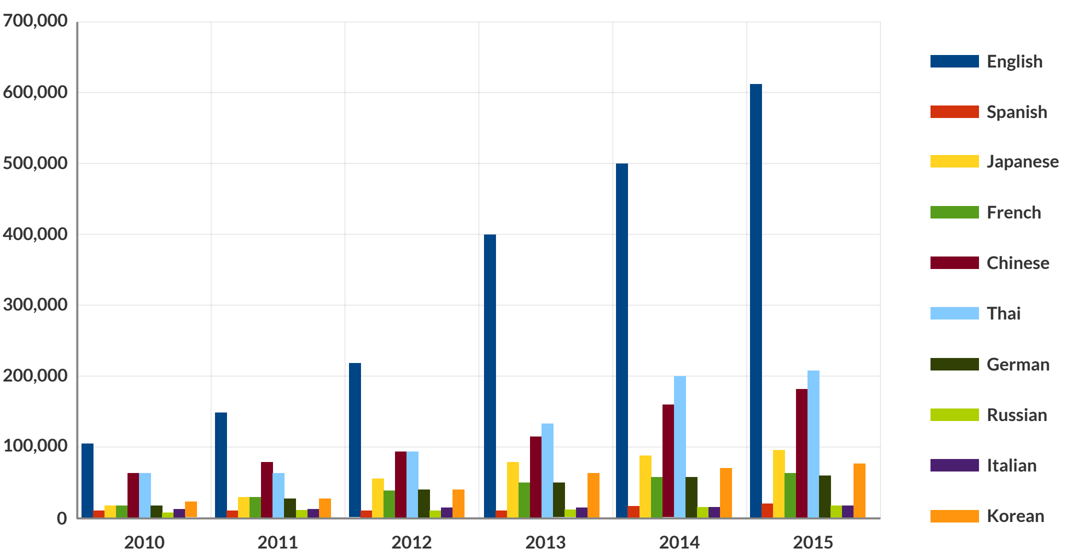


Source: MoHT

In order to further understand the market demand for tourist guides, it is important to know the ratio of guides to visitors by language specification. As there is no direct data available, this report made an estimate on the ratio through the following two-step methodology.

Step1: Categorize the MoHT's data on "visitors by nationality" by their language preference. This is based on an assumption that all international visitors would choose their primary national language as their preference for tourist guiding service. For example, a tourist from Spain or Mexico would prefer to choose the services of a Spanish-speaking guide, and a tourist from the UK, USA, or Australia would use an English guide. This assumption is only for estimation purposes. Chart 5 indicates the number of international visitors by language preference between 2010 and 2015 based on the above assumption. (See Appendix 4.2 for detailed data)

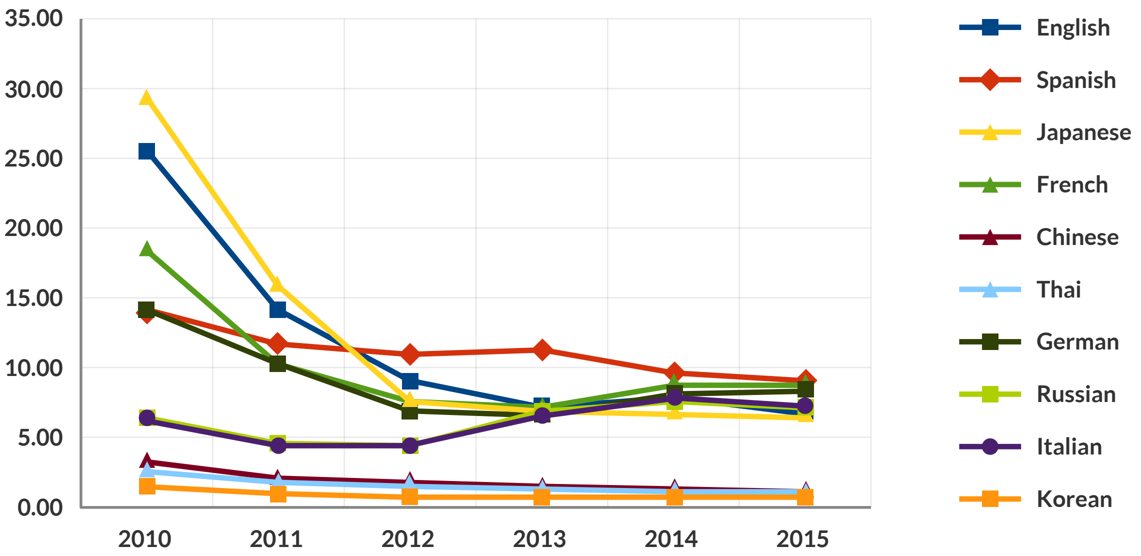
Chart 5: International visitors by language preference (2010-2015)



Source: Compiled by author based on data from MoHT

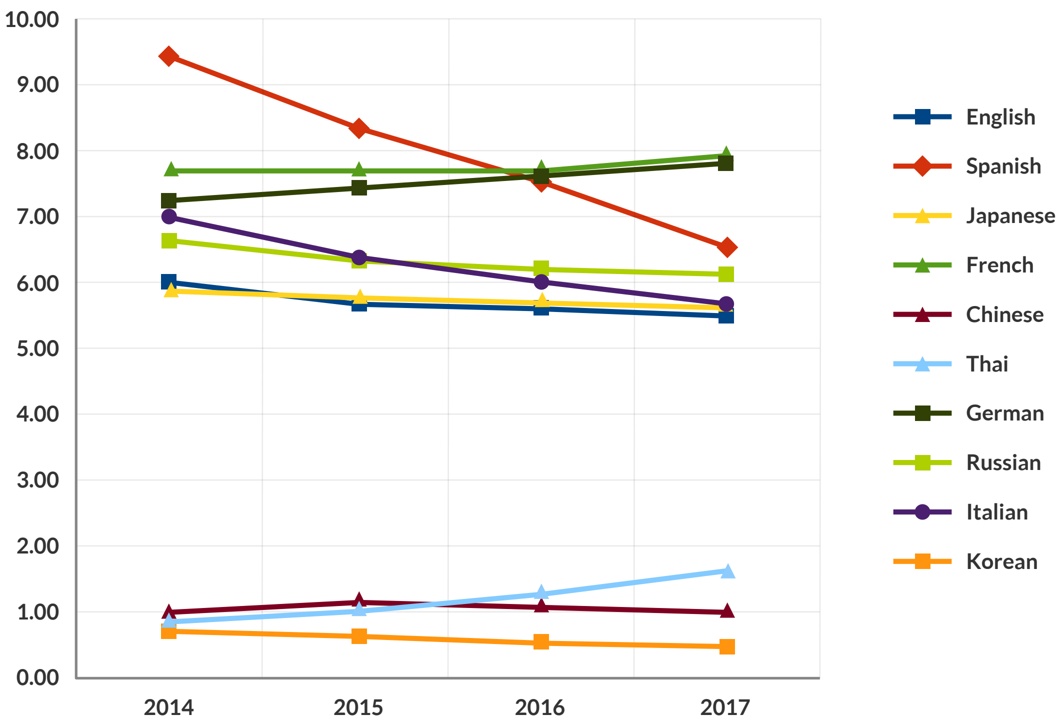
Step 2: Based on the number of international visitors by language preference estimated in Step 1, the ratio of guides to international visitors could then be estimated. As an example, the number of English guides in 2010 is 2,598 and the number of international visitors estimated to have used English guides is 102,101 (see Appendix 4.2 for detailed data), that means there are 25.45 guides per 1,000 visitors preferring English guides. Chart 6 indicates the number of guides per 1,000 international visitors for most foreign language groups in 2010, reduced sharply in 2011 and 2012, becoming more stable in 2013, 2014 and 2015.

Chart 6: Ratio of guides to international visitors (per 1000) 2010-2015



If the above trend continues in terms of the ratio between number of guides and international visitors by foreign language group, then forecasts for the following years can be estimated. These are represented in Chart 7. As an example, this indicates that for English speaking visitors, there would need to be 5.6 guides for 1,000 visitors in 2016 reducing slightly to 5.44 guides per visitor in 2017. Increases would come from for Thai speaking guides (1.34 guides per 1,000 in 2016 to 1.64 in 2017) and German speaking guides (7.61 guides in 2016 increasing slightly to 7.8 in 2017). (See Appendix 4.5 for detailed data)

Chart 7: Ratio of guides to international visitors by foreign language 2016, 2017



Forecasts (Charts 8, 9, & 10) on the number of international visitors by preferred foreign language are based on the international arrivals forecasts within the MTMP. The conservative estimates are given in Chart 8, the mid-range scenario is given in Chart 9 and the high growth scenario is in Chart 10 (Refer Appendix 4.5 for the supporting data).

Chart 8: Forecast of international visitor numbers by preferred foreign language in conservative growth scenario

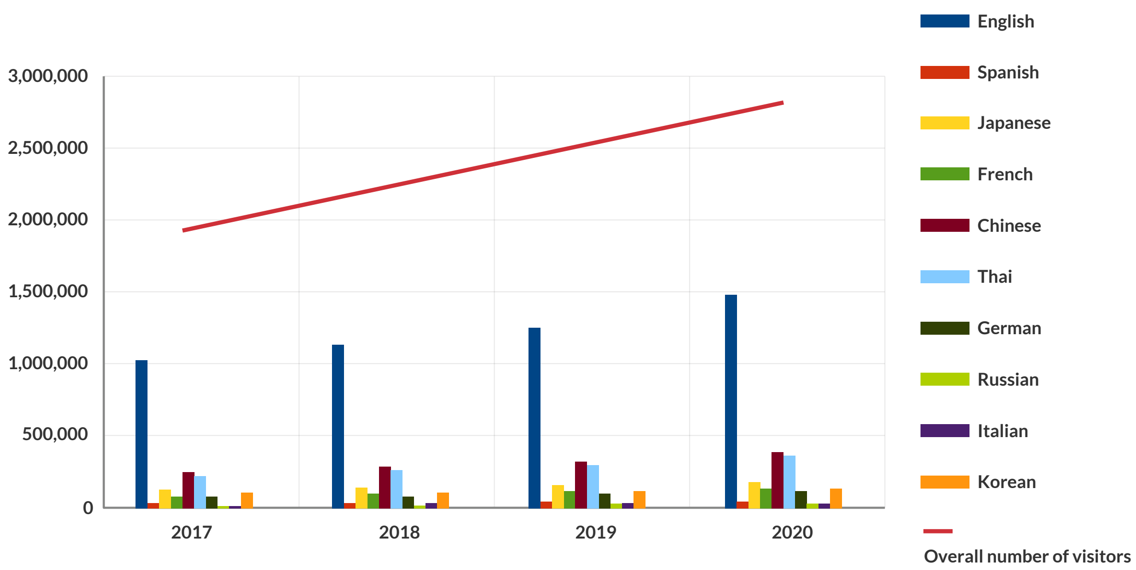


Chart 9: Forecast of international visitor numbers by preferred foreign language in mid-range growth scenario.

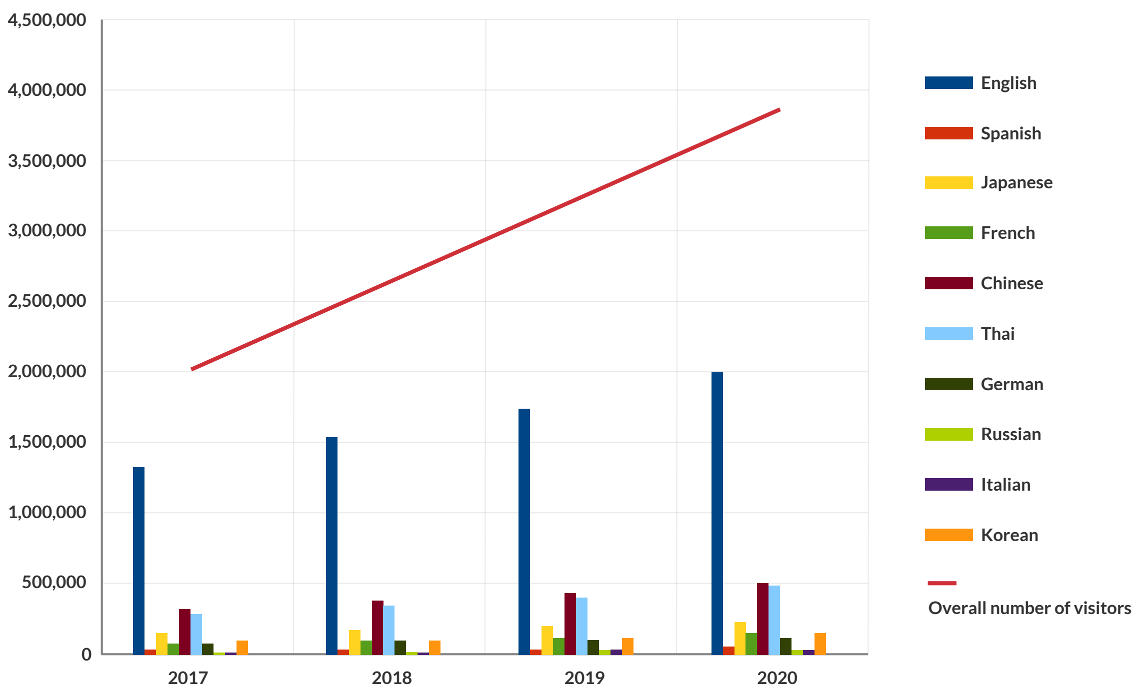
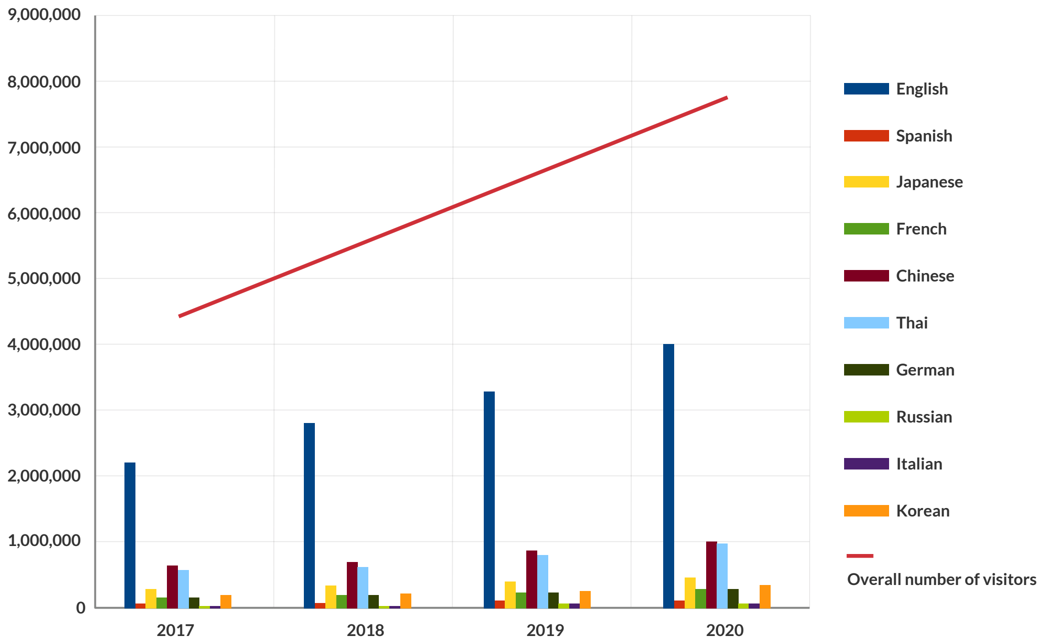


Chart 10: Forecast of international visitor numbers by preferred foreign language in high growth scenario

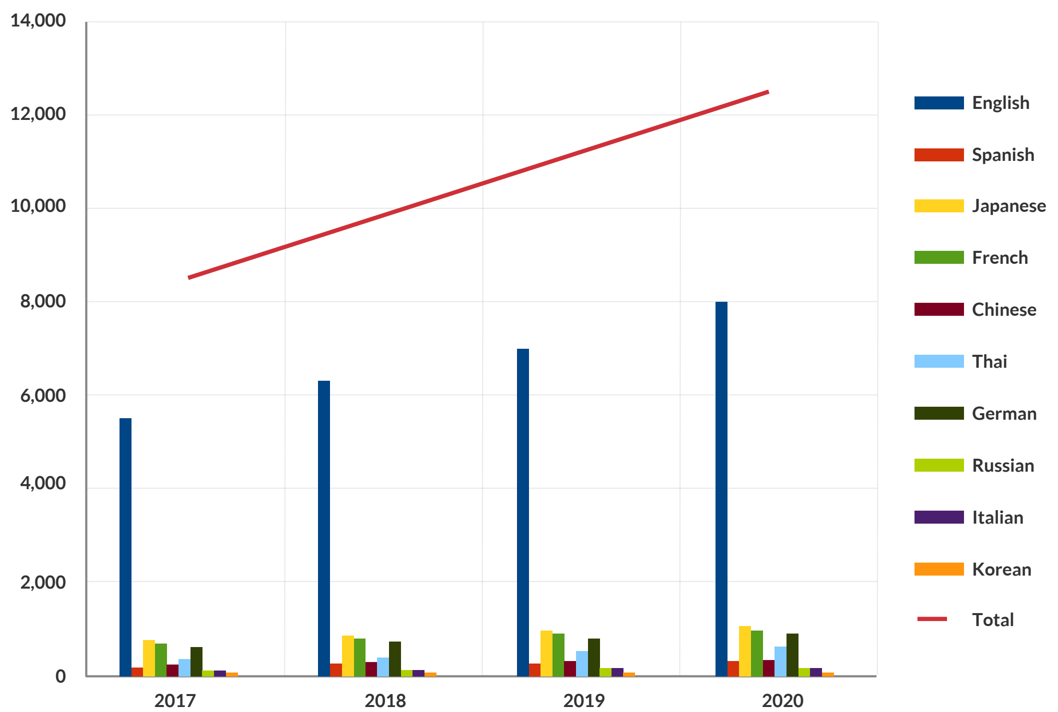


Based on the above forecasts on the number of international visitors by preferred foreign language a forecast on the number of tourist guides by foreign language specialization is given below (Refer to data in Appendix 4.6). It shows that by 2020, from the 'conservative' to high' scenario, that a range between 12,332 and 16,824 licensed guides would be needed in Myanmar.

The following three charts (11, 12, &13) refer to forecasts of numbers of guides per 1,000 international visitors up to 2020 (conservative estimates, mid-range estimates, high growth estimates). They result from an analysis of the charts above which were based on actual international visitor arrivals reported by MoHT, assumptions concerning the preferred language use by visitors, the historical data on guides and their foreign language specializations.

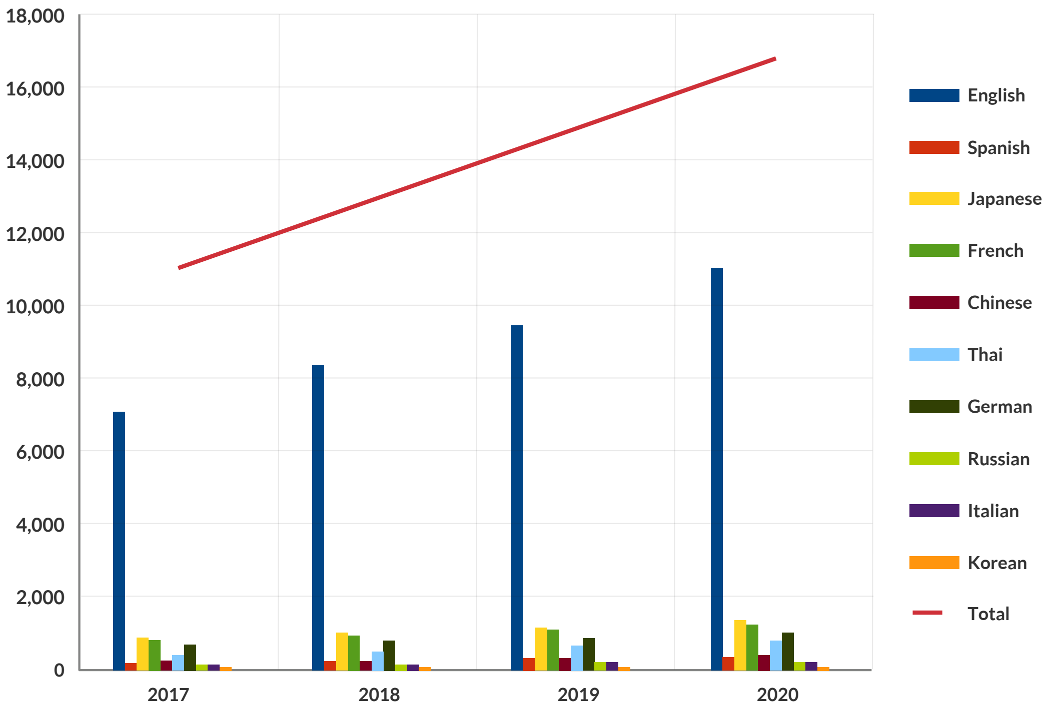
As illustrated in Chart 11, the conservative growth scenario indicates that 12,332 guides would be required.

Chart 11: Forecast of tourist guides by foreign language specialization in conservative growth scenario



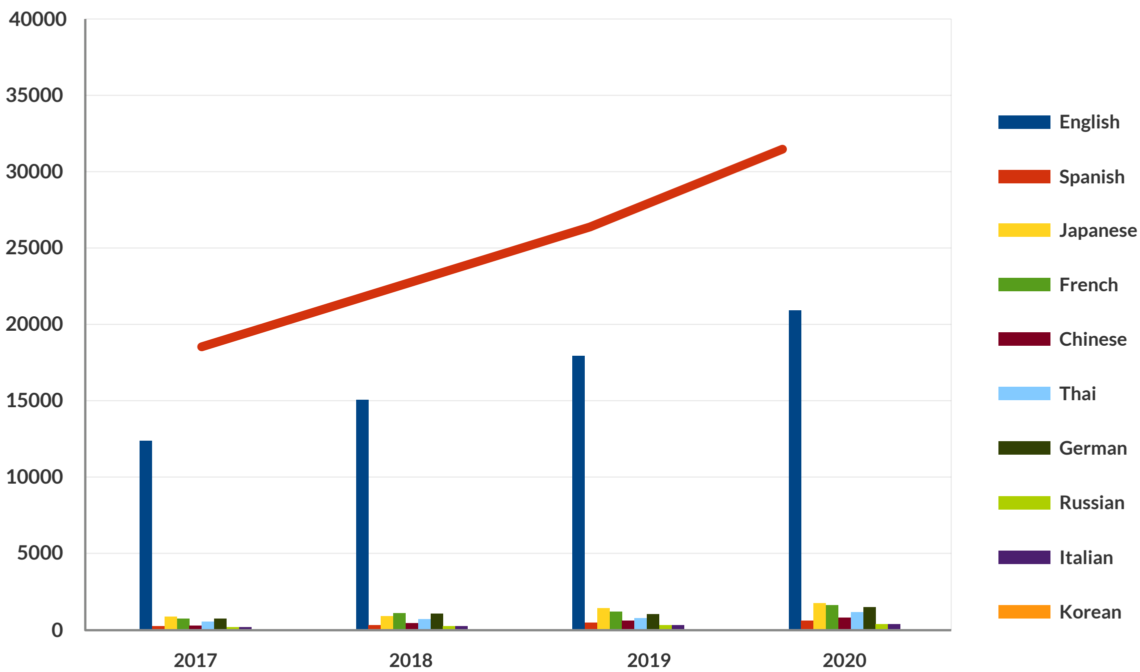
As illustrated in Chart 12, the mid-range growth scenario indicates that 13,912 guides would be required.

Chart 12. Forecast for guide demand per foreign language in mid-range growth scenario



As illustrated in Chart 13, the high growth scenario indicates that 16,824 guides would be required.

Chart 13: Forecast for guide demand per foreign language in high growth scenario



Given the evidence that the actual international visitor arrivals into Myanmar in recent years have been exceeding the high scenario forecast from the MTMP, this report suggests that by 2020 it is most likely that something similar to the high' scenario of 16,824 licensed guides would be needed in Myanmar. Essentially, this can be rounded-up to a forecast of 17,000 national and regional licensed guides.

3.2 Supply Gaps

The MoHT is the sole national body that provides tourist guide training courses and license issuance. At national level, the MoHT offers a two-month national tourist guiding course in its national training center in Yangon, while at regional or state level, it offers a one-month regional and local tourist guiding training based upon emerging market needs or as maybe requested by regional and state governments. In 2015 for example, 484 national tourist guides completed the two-month training in Yangon; In addition, 780 regional tourist guides completed the one-month training programme in the emerging tourism spots including Kalaw, Katha, Kawthaung, Kyaing Tong, Myeik and Shwebo.

There are different views on the quality of the MoHT trainings programmes, but one dominant concern was the lack of linkage between the MoHT's training courses and the national qualification system where the outcomes of learning could be formally recognized and where the learners could be prepared for immediate or later entry to the workplace. Myanmar is now developing its national qualification system and the NSSA is one of the key institutions leading the process, it can be an opportune time for the tourist guides training programme to be upgraded in line with the NSSA qualification system. This way, it could also pave the way for standardization and expansion of tourist guide training to meet future market needs.

3.3 Sector Strategy

To close the supply gaps and to prepare for the increasing demand in tourist guides projected, the tourist guides sector strategy should continue to develop consistent with the nine guiding principles expressed in the Myanmar Responsible Tourism Policy (2013) and the MTMP. (See Box 3)

In line with these nine principles, the MoHT has identified actions for nine key intervention areas for the tourist guides sector, with support by Luxdev and BIF. These are:

1. Define tourist guide levels, roles and responsibilities
2. Assist NSSA with competency standards for each tourist guide category/level
3. Decentralised training and identifying priority hubs for training delivery
4. MTGA, UMTA and MoHT collaboration to review and strengthen current training delivery
5. Review tourist guide training materials and curricula
6. Train trainers and occupational experts
7. Steps to build MTGA capability
8. Review market conditions and processes for MTGA and UMTA training delivery
9. Review market conditions for private sector training delivery

Box 3:
Nine Guiding Principles in the Myanmar Responsible Tourism Policy (2013)

- Recognize an incorporate tourist guides as a key component of the development of tourism as a national priority sector
- Promote broad-based local social and economic development through the involvement of guides to expand and deliver new product offers throughout the nation
- Engage professional guides to assist in maintaining cultural diversity and authenticity
- Guides as a contributor to conserving and enhancing Myanmar's protected areas and natural environment;
- Guides adding value for Myanmar to compete on product richness, diversity and quality
- Guides are trained to ensure the health, safety and security of visitors
- National and regional guide associations are strengthen to more effectively represent the collective views and needs of the tourist guide industry
- Guides have effectively participated with other key stakeholder groups to develop a well-trained and rewarded workforce;
- Training and mechanisms are in place to minimize unethical practices

The nine interventions were considered within the context of significant challenges identified to varying degrees across ASEAN Member States, and are particularly relevant in Myanmar as it implements the ASEAN Mutual Recognition Agreement (MRA) on Tourism Professionals.[34] In order to provide a strategic foundation to reform Myanmar's tourist guide industry, each of the nine intervention areas was assessed according to the following four elements: intervention topics, reform process, outcome and resources.

Work on this ILO STED report has contributed to implementing a number of the intervention areas, specifically to enhancing collaboration between key stakeholder organizations by bringing key stakeholder groups together to discuss tourist guide levels, roles and responsibilities, assisting NSSA in their ongoing work to develop competency standards for tourist guide, reviewing tourist guide training materials and curriculum, and reviewing market conditions for training delivery. The findings of this STED report have also contributed to the section on tourist guide in the upcoming MTHRDSAP.

Some highlights are:

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 tourist 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, heritage and history, followed by trekking and cooking.

34 ASEAN – Australia Development Cooperation Program (AADCP) Phase II Gap Analysis on Implementation of MRA on Tourism Professionals – Report (2013)

Institutions

- There is a need for stronger coordination between NSSA, MoHT, MTGA & UMTA to deliver a structured tourist guide profession within the national qualifications system.
- Tourist guides and tour operators are unfamiliar with the national TVET systems, terminology, institutions and programmes.

Capacity

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

Chapter 4: Recommendations & Directions

As noted in the Myanmar Tourist Guide Policy Framework 2015, quality tourist guides need to: have skills in organizing and managing small and large groups of people; be able to adequately facilitate encounters with local people and other tourists; possess leadership skills to manage any tensions and social integration; and be able to provide culturally appropriate and accurate information and translation of topics that are unfamiliar to the customer. Guides do not only need the appropriate training and skills for quality customer service delivery. They also need the knowledge and skills to undertake their special role and responsibility in the management of tourism resources and impacts throughout the country. Therefore, it is important to ensure that skills training and qualifications frameworks enable guides to work at different industry levels. To address this, the STED report provides the following recommendations:

1. Continue to develop policies and implement actions for the tourist guide sector which are consistent with MTMP's nine guiding principles for the tourism sector which is outlined in Section 3.1.
2. Use the STED findings to inform the strategic direction of the tourist guide sector within the MTHRDSAP.
3. In consistence with the MTMP and the upcoming MTHRDSAP, where appropriate, any implementation of STED recommendations should also mainstream seven cross-cutting themes: gender equity, environmental sustainability, partnership, innovative financing, regional cooperation, ensuring access for people with disabilities, and consultation and participation.
4. The lack of accurate and timely data on Myanmar's tourism industry is addressed in most strategic plans for the industry. There is considerable industry concern[35] (including amongst guides) about the 'real number' of international tourists – that is visitors who have holiday or recreation as their primary purpose of visit and who spend one or more nights in commercial accommodation. It is recommended that Myanmar take necessary steps to strengthen tourism information systems and metrics and to train suitable personnel to establish and maintain a future Tourism Satellite Accounting system.
5. A not-for-profit, membership based industry advocacy association such as the MTGA requires special skills

   and resources to be able to act effectively on behalf of its constituency. MTGA has evolved from a collection of individuals into a legal, licensed and equally accepted member of the MTF framework, and, accordingly,

35 Similar to the situation experienced in many destinations, especially in transitioning economics such as Myanmar, destinations building robust and reliable national statistical instruments for international and domestic tourism require time and adequate technical skills and resources. The foundations to enable harmonizing with acceptable international frameworks for collecting and analyzing tourism arrivals data (as well as economic and employment data relating to tourism) are developing with Myanmar's re-engagement with the United Nations World Tourism Organisation and the International Labour Organisation. This will be vital to addressing the nation's quality issues relating to internationally comparable tourism data (various data relating to arrivals, economic & employment impacts).

should now play an increasingly important role on behalf of Myanmar's tourist guides, including being engaged in any consultation processes with other industry associations (such as UMTA and MMTHRDA) and government departments/agencies (such as MoHT and NSSA) with respect to the qualification system development. It is recommended development partners consult with MTGA concerning their immediate and future needs for technical and training support.

6. Noting Myanmar's obligations and resources available through the ASEAN Mutual Recognition Agreements (MRA), as a result of the STED Survey findings and in order to meet the future market needs for tourist guides, it is recommended to establish public private sector mechanisms to reach agreement on:
   (a) A structured system for tourist guide skills development, competency standards and agreed qualifications framework.
   b) How to best take knowledge and perceptions from industry into government led agencies or initiatives that directly impact on TVET issues relating to tourist guides.
   (c) How to better inform industry about government commitments and/or opportunities under ASEAN MRA to help increase the professionalism and competitive performance of tourist guides in Myanmar.
   (d) How to increase industry awareness about competency-based training methodologies, principles of self-centred learning through classroom learning, online or distance learning methods, recognition of prior learning within qualifications systems and continuous professional development opportunities.

7. Continue with the Action Plan resulting from the National Consultation Meeting on 10 February 2016, namely:

Issue 1: Harmonize occupational classification for tourist guides with international classifications and meeting industry needs.

Actions:

Review the occupation classification for tourist guides in Myanmar Standard Classification of Occupation 2003 version (MSCO 2003).

Review the definitions used by private sector and within international guidelines i.e. International Standard Classification of Occupations (ISCO) and compare them with the MSCO 2003.

Initiate a process to update the tourist guides occupation qualification levels to align with industry needs.

Issue 2: Develop the national occupational standard for tourist guides.

Actions:

The following existing literature can be considered for further review and incorporation during the occupational standards development process.

(a) The draft tourist guides occupational standards (two levels) developed under the ASEAN-Australia Development Cooperation Program (AADCP) between 2004 to 2006.

(b) The Regional Model Competency Standards (RMCS) for tourism industry developed by the ILO. And,

(c) Recent similar occupational standards development experiences in other ASEAN member countries.

Issue 3: Capacity building for public and private sectors.

Actions:

Capacity building for both government and industry to understand the objective, approach and process of the occupational standard development and its linkage with the ongoing construction of the national qualification system – Myanmar National Qualification Framework (NQF).

Develop curricula and tools for training of trainers.

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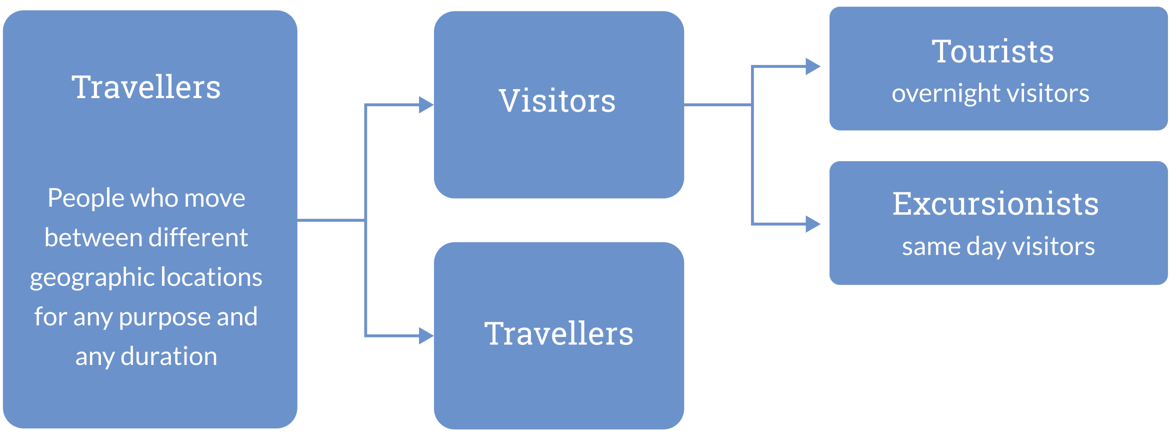
Appendix

Appendix 1: Definition of Travellers, Visitors, Tourist and Excursionists

Travelers, Visitors, Tourist and Excursionists are often unclear and mixed terms used to describe the phenomenon of travel and tourism. Diagram 4 provides a simple structure.[36] The UNWTO and the ILO (2014) note that in general terms, tourism is about travel, visitors and travellers. 'Travel refers to the activity of travellers; a traveller is someone who moves between different geographical locations for any purpose and any duration; a visitor is a traveller taking a trip to a main destination outside his/ her usual environment, for less than a year for any main purpose other than to be employed by a resident entity in the country or place visited (e.g. for holiday, leisure and recreation, business, health, education or other purpose).'

Diagram 4: Travellers, Visitors, Tourists, Excursionists (UNWTO)



For the purposes of improving international comparability of tourism data, the International Recommendations for Tourism Statistics 2015 (IRTS 2015) – the Compendium contains internationally comparable data series and indicators on:

1. Inbound tourism
2. Domestic tourism
3. Outbound tourism
4. Tourism industries
5. Employment
6. Complementary (macroeconomic) indicators.

36 UNWTO: www.statistics.unwto.org

Appendix 2: ISCO for tourist guides

According to International Standard Classification of Occupations, Volume 1: ISCO-08, ILO, groups relating to "tourist guides" are:

Major Group	5	Services and Sales Workers
Sub-major Group	51	Personal Services Workers
Minor Group	511	Travel Attendants, Conductors and Guides
Unit Groups	5111	Travel Attendants and Travel Stewards
	5112	Transport Conductors
	5113	Travel Guides

"Tourist Guides" are include as an example of the occupations classified under 'Travel Guides'

Unit Group 5113

Travel Guides

Travel guides accompany individuals or groups on trips, sightseeing tours and excursions and on tours of places of interest such as historical sites, industrial establishments and theme parks. They describe points of interest and provide background information on interesting features.

Tasks include –

(a) escorting and guiding tourists on cruises and sightseeing tours;

(b) escorting visitors through places of interest such as museums, exhibitions, theme parks, factories and other industrial establishments;

(c) describing and providing information on points of interest and exhibits and responding to questions;

(d) conducting educational activities for schoolchildren;

(e) monitoring visitors' activities to ensure compliance with establishment or tour regulations and safety practices;

(f) greeting and registering visitors and tour participants, and issuing any required identification badges or safety devices;

(g) distributing brochures, showing audiovisual presentations, and explaining procedures and operations at tour sites;

(h) providing for physical safety of groups, and performing activities such as providing first aid and directing emergency evacuations;

(i) resolving any problems with tour itineraries, service or accommodation.

Examples of the occupations classified here:

- Art gallery guide
- Tour escort
- Tourist guide

Appendix 3: Qualifications certificate framework & job title options for tourist guides

Qualification *Notes the NSSA term, followed by the ASEAN term for the qualification.*	**Job level** *(NSSA approved)*	**Options for job titles in the Tour Guide sector** *(suggestions only – from commonly used existing terms in Myanmar plus terms used in other countries for similar job levels)*	**Skill, Knowledge & Ability** *(NSSA approved)*
NSSA approved: *Certificate 1* Option proposed & then to be approved by NSSA: *Certificate I in Tour Operation (Guiding)*	Semi-skilled worker	• Fresh Guides • Fresh Conductors • Trainee Tour Guide • Trainee Tour Leader • Trainee Local Guide • Trainee Eco-Tour Guide • Trainee Driver Guide • Local Village Guide • Trainee Trekking Guide	◊ Demonstrate basic knowledge by recall in a narrow range of area ◊ Perform basic or preparatory practical skills in a defined range of tasks ◊ Carry out routine tasks given with clear direction ◊ Demonstrate understanding of safety requirements ◊ Receive and pass on information related to the work ◊ Access and record information related to the work ◊ Take limited responsibility for output of self
NSSA approved: *Certificate 2* Proposal & then approved by NSSA: *Certificate II in Tour Operation (Guiding)*	Skilled worker	• Camp Assistant • Assistant Camp Cook Assis-tant Guide Porter • Assistant Tour Guide • Assistant Tour Leader • Assistant Local Guide • Assistant Eco-Tour Guide • Assistant Trekking Guide • Site Guide	◊ Demonstrate basic operational knowledge in a moderate range of areas ◊ Perform practical skills in a range of varied tasks ◊ Demonstrate a prescribed range of functions involving known routines and procedures ◊ Perform tasks that involve some complex or non-routine activities autonomously or in collaboration with others as part of a group of tea ◊ Receive and pass on information related to the work ◊ Take some responsibility for the quality of the outputs

NSSA approved: *Certificate 3* Proposal & then approved by NSSA: *Certificate III in Tour Operation (Guiding)*	Advanced skilled worker	• Station Guide • Tour Conductor • Local Guide • Local Conductor • Tour Guide • Tour Leader • Local Guide • Eco-Tour Guide • Driver Guide • Trekking Guide • Supervisor	◊ Demonstrate some relevant theoretical knowledge ◊ Apply a range of well-developed skills ◊ Apply known solutions to a variety of predictable problems ◊ Perform tasks that require a range of well-developed skills with some judgement as required ◊ Interpret available information ◊ Take responsibility for own inputs ◊ Take limited responsibility for the work of others
NSSA approved: *Certificate 4* Option to be proposed & then approved by NSSA: *Certificate IV in Tour Operation (Guiding)*	Supervisor	• Licensed Tour Guide • Tour Guide • Regional Guides of Tour • Conductor Team • Regional Guide • Senior Tour Guide • Tour Leader • Resort Representatives • Guide Captain • Tour Manager	◊ Demonstrate understanding of a broad knowledge based and apply some theoretical concepts ◊ Apply solutions to a defined range of unpredictable problems ◊ Identify and apply skills and knowledge to a wide variety of contexts ◊ Identify, analyse and evaluate information from various sources ◊ Understand and take responsibility for quality, safety and environmental issues ◊ Supervise the work of others ◊ Take limited responsibility for the quantity and quality of the outputs of others

Source: the Myanmar Tour Guiding Sector: A Policy Framework (BIF 2015)

Appendix 4: Data used for estimate of future tourist guides demand

4.1 Foreign language x tourist guide (MoHT)

	2010	2011	2012	2013	2014	2015
English	2598	1931	2058	2187	2296	2349
Spanish	101	106	110	111	110	106
Japanese	484	343	350	403	384	352
French	280	231	246	277	282	278
Chinese	171	125	139	132	131	123
Thai	108	106	108	132	138	150
German	235	219	230	264	268	261
Russian	36	35	40	64	69	66
Italian	44	43	48	68	68	64
Korean	20	21	24	29	30	26
Regional					1070	1855

4.2 Foreign language x international visitor

	2010	2011	2012	2013	2014	2015
English	102101	137399	224272	400697	496754	607779
Spanish	7481	9036	10223	10213	14998	18733
Japanese	16186	21321	47690	68761	83434	90312
French	15554	22790	34691	41408	47705	54101
Chinese	60311	77560	92865	121249	158273	179712
Thai	59692	61696	94342	139770	198229	204539
German	17146	21515	34586	41218	47554	52481
Russian	6118	7622	9077	10183	13592	15433
Italian	7169	9710	10830	11728	12613	14841
Korean	18930	22524	34805	54934	58472	63715

4.3 Ratio of guides to international visitors (1000) x preferred language

	2010	2011	2012	2013	2014	2015
English	25.45	14.05	9.18	5.46	5.93	5.76
Spanish	13.50	11.73	10.76	10.87	9.41	8.44
Japanese	29.90	16.09	7.34	5.86	5.91	5.81
French	18.00	10.14	7.09	6.69	7.59	7.66
Chinese	2.84	1.61	1.50	1.09	1.06	1.02
Thai	1.81	1.72	1.14	0.94	0.89	1.09
German	13.71	10.18	6.65	6.40	7.23	7.42
Russian	5.88	4.59	4.41	6.28	6.52	6.38
Italian	6.14	4.43	4.43	5.80	6.92	6.43
Korean	1.06	0.93	0.69	0.53	0.66	0.61

4.4 Ratio of guides to international visitors by foreign language 2016, 2017

	2014	2015	Difference %	2016	2017
English	5.93	5.76	-2.83	5.60	5.44
Spanish	9.41	8.44	-10.34	7.57	6.78
Japanese	5.91	5.81	-1.59	5.72	5.63
French	7.59	7.66	1.02	7.74	7.82
Chinese	1.06	1.02	-3.90	0.98	0.94
Thai	0.89	1.09	22.42	1.34	1.64
German	7.23	7.42	2.55	7.61	7.80
Russian	6.52	6.38	-2.10	6.24	6.11
Italian	6.92	6.43	-7.05	5.98	5.56
Korean	0.66	0.61	-7.57	0.56	0.52

4.5 Forecast of international visitor numbers by preferred foreign language

Conservative

	Number of Tourists	English	Spanish	Japanese	French	Chinese	Thai	German	Russian	Italian	Korean
2017	1951129.64	1017921	32698	118389	77848	259225	243643	71514	22261	22989	84643
2018	2204776.50	1150251	36948	133779	87968	292925	275316	80811	25155	25977	95646
2019	2491397.44	1299783	41751	151170	99404	331005	311108	91316	28425	29354	108080
2020	2815279.11	1468755	47179	170823	112327	374035	351552	103188	32120	33170	122131

Mid-Range

	Number of Tourists	English	Spanish	Japanese	French	Chinese	Thai	German	Russian	Italian	Korean
2017	2525321.84	1317482	42320	153229	100758	335512	315344	92560	28812	29754	109552
2018	2904120.11	1515104	48668	176213	115871	385839	362645	106444	33134	34217	125985
2019	3339738.13	1742370	55968	202645	133252	443714	417042	122410	38104	39349	144882
2020	3840698.85	2003725	64363	233042	153240	510272	479599	140772	43820	45252	166615

High

	Number of Tourists	English	Spanish	Japanese	French	Chinese	Thai	German	Russian	Italian	Korean
2017	4412665.37	2302125	73949	267747	176061	586263	551022	161736	50345	51991	191427
2018	5295198.45	2762550	88738	321297	211273	703515	661226	194083	60414	62389	229713
2019	6354238.14	3315060	106486	385556	253528	844218	793471	232900	72497	74867	275655
2020	7625085.77	3978072	127783	462667	304233	1013062	952165	279480	86997	89840	330786

4.6 Forecast of tourist guides by foreign language specialization

Conservative

	Number of Tourists	English	Spanish	Japanese	French	Chinese	Thai	German	Russian	Italian	Korean	Total
2017	1951130	5540	222	666	609	244	399	558	136	128	44	8547
2018	2204776	6261	251	753	688	276	451	630	154	144	50	9658
2019	2491397	7074	283	851	777	312	510	712	174	163	56	10913
2020	2815279	7994	320	962	878	353	576	805	196	184	63	12332

Mid-Range

	Number of Tourists	English	Spanish	Japanese	French	Chinese	Thai	German	Russian	Italian	Korean	Total
2017	2525322	7171	287	863	788	316	517	722	176	165	57	11062
2018	2904120	8246	330	992	906	364	594	830	203	190	65	12721
2019	3339738	9483	380	1141	1042	418	684	955	233	219	75	14629
2020	3840699	10906	437	1312	1198	481	786	1098	268	251	87	16824

High

	Number of Tourists	English	Spanish	Japanese	French	Chinese	Thai	German	Russian	Italian	Korean	Total
2017	4412665	12530	502	1507	1377	553	903	1262	308	289	100	19329
2018	5295198	15036	602	1809	1983	663	1084	1514	369	347	119	23526
2019	6354238	18043	722	2171	1983	796	1301	1817	443	416	143	27834
2020	7625086	21652	867	2605	2379	955	1561	2180	532	499	172	33401

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