REPUBLIC OF THE UNION OF MYANMAR

NATIONAL EXPORT STRATEGY

TRADE INFORMATION

CROSS-SECTOR STRATEGY   2015-2019

Myanmar Ministry of Commerce

International Trade Centre

The National Export Strategy (NES) of Myanmar is an official document of the Government of the Republic of the Union of Myanmar.

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ACRONYMS

BIU	Business Information Unit	**MoC**	Ministry of Commerce
CSO	Central Statistical Organization	**MoI**	Ministry of Information
DICA	Directorate of Investment and Company Administration	**PoA**	Plan of Action
		TBT	Technical Barriers to Trade
IT	Information Technology	**TI**	Trade Information
ITC	International Trade Centre	**TPD**	Department of Trade Promotion
JICA	Japanese International Cooperation Agency	**TSI**	Trade Support Institution
MLFRD	Ministry of Livestock, Fisheries and Rural Development	**TSN**	Trade Support network
MoAI	Ministry of Agriculture and Irrigation	**UMFCCI**	Union of Myanmar Federation of Chambers of Commerce and Industry

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EXECUTIVE SUMMARY

Reliable and timely access to trade information (TI) is an important prerequisite for developing export competitiveness; however, this field has by and large been neglected in Myanmar. Until recently, explicit focus on issues related to TI has been missing from Myanmar Government plans, legislation, studies and development programmes. Nonetheless, this trend is now changing with growing cognizance among both policymakers and the private sector of the relevance of TI to success in the export value chain.

CURRENT STATE OF THE MYANMAR TI FUNCTION

The following broad categories of TI needs have been identified for Myanmar exporters:

- Promotional tools;
- Market access conditions, including tariff and non-tariff barriers;
- Margins of preferential access and rules in trade agreements;
- Mandatory sanitary and phytosanitary standards, and technical standards (technical barriers to trade (TBT));
- Private standards;
- Market analysis, including market size, buyers and main competitors in overseas markers;
- Logistics information;
- Business opportunities, including business and buyer contacts, and names of importers and distributors; and
- Export-related Customs procedures, including certificates of origin and declaration forms.

Myanmar enterprises rely on the Department of Trade Promotion (TPD) in the Ministry of Commerce (MoC) and the Business Information Unit (BIU) at the Union of Myanmar Federation of Chambers of Commerce and Industry (UMFCCI) and sister associations for information on export markets. They rarely use international databanks and information provided by international institutions to manage their TI needs. Local sources such as chambers of commerce and ministries are also used,

although there is no efficient and coordinated information network to easily satisfy the needs of enterprises.

COMPETITIVENESS CONSTRAINTS

Competitiveness constraints related to TI can be divided along two dimensions – policy and institutional level constraints relating to legislative matters and service delivery of trade support institutions (TSIs) on the one hand, and enterprise-level constraints that relate to capacity gaps within enterprises vis-à-vis the TI function on the other.

Policy and institutional level constraints include:

- Lack of publicly available TI;
- Lack of experienced TI consultancies and research think tanks;
- Poor advocacy among TI providers;
- Lack of policy focus on TI;
- Weak coordination among TSIs;
- Lack of information collected by TSIs on international markets;
- Need for a one-stop portal for TI;
- Lack of institutionalization of TI exchange between the Government and TSIs; and
- Lack of service focus outside Yangon.

Enterprise level constraints include:

- Lack of knowledge on what kind of information is required in an export marketing strategy;
- A general lack of networking, alliances and cross-pollination of information among enterprises; and
- A lack of integration of TI within the decision-making framework of enterprises.

OPTIONS FOR FUTURE DEVELOPMENT

Improvements within the TI function constitute a critical prerequisite for unlocking Myanmar's export competitiveness. Keeping this in mind, the following vision has been developed for the function.

> " Enable export-led growth by providing timely trade information to stakeholders throughout the value chain. "

The following will be key features of the future shape of the TI function, underlying the vision. These critical elements are all addressed through the activities of the cross-sector's strategic Plan of Action (PoA):

- Improved quality and scope of TI which is relevant to stakeholders in Myanmar;
- Improved dissemination of TI through innovative channels of media, with a greater ability to reach more remote constituencies;
- Detailed information about countries of destination in Myanmar trade – specific sectors, markets and products – provided through an easily accessible platform;
- Improved capacity at the enterprise level to leverage existing sources of TI and synergize information sources to their advantage.

ROAD MAP FOR STRATEGY IMPLEMENTATION

The vision and the key features for the function will be achieved through the implementation of the strategy's PoA, which revolves around the following four strategic objectives, each spelling out specific sets of activities intended to address both challenges and opportunities of the TI function in Myanmar:

- Improve the collection of TI;
- Improve the reach and relevance of TI within Myanmar;
- Improve the quality and timeliness of TI;
- Increase coordination and collaboration among TSIs in Myanmar.

The achievement of these objectives will require continuous and coordinated efforts from all relevant private and public stakeholders, as well as support from key financial and technical partners, donors and investors. The total envisaged cost of this PoA amounts to US$ 4.7 million. Several institutions are designated to play a leading role in the implementation of the strategy's PoA and bear the overall responsibility for successful execution of the strategy. They will be assisted by a range of support institutions that are active in the TI function. Each institution mandated to support the development of the export function is clearly identified in the strategy PoA.

Moreover, the Myanmar Trade Development Committee (MTDC) and its Executive Secretariat will play a coordinating and monitoring role in the implementation of the strategy within the overall framework of the National Export Strategy. In particular, the Myanmar Trade Development Committee will be tasked with coordinating the implementation of activities in order to optimize the allocation of both resources and efforts across the wide spectrum of stakeholders.

Box 1: Building blocks of the trade information cross-sector strategy

The following analytical components are the building blocks of the TI cross-sector strategy.

Current state of the Myanmar TI function

This section discusses the relevance of TI for Myanmar export development and provides an overview of the national framework. This overview serves as the basis for a broader analysis of the performance and efficiency of the TI function in Myanmar.

Trade Support Network (TSN) analysis

TSIs are organizations that have a bearing on the development and delivery of TI services in Myanmar. An analysis of the effectiveness and capacity gaps affecting these TSIs is important to ascertain the efficiency of the entire TI framework.

The TSN analysis section assesses individual TSIs on their capacities in areas such as coordination, financial sustainability, human capital and advocacy. Analysis is also conducted to assess the TSIs based on their level of influence versus their capacity to respond to client needs. A composite picture is developed of the strengths and weaknesses of the cross-sector's TSN.

Analysis of development activity for the Myanmar TI function

Gaining an understanding of development activity in the cross-sector is relevant because it helps to identify the main thrusts of the various development actors and their initiatives, while also identifying gaps that need to be addressed. This section analyses current levels of development activity for TI.

Competitiveness constraints

The effectiveness and efficiency of TI is currently restricted because of a host of constraints both at the institutional (supply-side) and enterprise (demand-side) levels. These wide-ranging constraints have resulted in restricted access to international markets for Myanmar exporters. The competitiveness constraints section discusses these important challenges and their impact on current and potential exporters.

How to get there

The *how to get there* section highlights the key elements of the strategy for the TI cross-sector function and discusses the way forward. This includes the vision for the cross-sector, the strategic objectives and the implementation management framework.

The analyses and recommendations are based on national level consultations supported by external analytical research. Once endorsed by the Government of the Republic of the Union of Myanmar, the TI strategy will serve as the main road map for private and public stakeholders to improve TI access for exporters.

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INTRODUCTION

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Successful navigation of international markets hinges on the ability of both the private and public sectors to leverage TI. Current market information allows firms to understand the commercial landscape of both existing and potential markets. Such data facilitates the continued competitiveness of products and may permit enterprises to capitalize on emerging opportunities. Reliable information can be used to stay ahead of new trends and demands, thereby allowing enterprises to design, develop and modify products based on the requirements of target markets. Moreover, reliable information on international standards and regulations allows exporters to design products in accordance with the compliance principles of target markets. This is a prerequisite for market penetration, and a well-functioning TI sector would therefore contribute to diversification by facilitating the expansion of both geographic and product markets.

The TI strategy presented in this document is an integral part of the National Export Strategy of Myanmar. The efficiency of the TI network in Myanmar will contribute a great deal to the export performance of the key priority sectors of the National Export Strategy. This document presents the expectations and strategic objectives of the private and public sectors for an improved TI function in Myanmar. It is clear that without concerted efforts to address critical issues this function, which is vital for trade development, will not satisfy the needs of exporters.

The analysis and recommendations of this strategy focus on key organizational, technical and skills development challenges that can be resolved through a structured partnership of TI institutions. There is significant scope for empowering exporters' market entry and development through strengthened and more dynamic TI.

WHERE WE ARE NOW

CURRENT STATE OF THE MYANMAR TRADE INFORMATION FUNCTION

Based on information collected in stakeholder workshops, industrial enterprises in Myanmar have expressed the need for the following types of TI:

- Promotional tools
- Information on key trade promotion events
- Market access conditions, including tariff and non-tariff barriers
- Margins of preferential access and rules in trade agreements
- Mandatory sanitary and phytosanitary standards and technical standards (TBT)
- Private standards
- Market analysis, including market size, buyers and main competitors in overseas markers
- Logistics information
- Business opportunities, including business and buyer contacts, and names of importers and distributors
- Export-related Customs procedures, including certificates of origin and declaration forms.

There is a considerable lack of TI in Myanmar relating to current and potential target markets in terms of market developments, trends, market access indicators, packaging, culture and other relevant factors for exporting products. For both basic and specific information, enterprises often rely on the information available from the BIU of UMFCCI or the TPD of MoC.[1] These institutions provide physical libraries and also provide online support (in the formal of e-mail enquiries), as well as web portals for contact information. They also provide computers for Internet searches, as well as a small library of CD-ROMs from

such organizations as ITC or the Netherlands Centre for the Promotion of Imports from Developing Countries on markets and export promotion tools.

Often the TI gathered through this route is generic: it is not applied to the needs of Myanmar and it lacks a depth of information on international market conditions. Moreover, often information requested by stakeholders is supplied very late or queries are not responded to at all, according to stakeholders. Myanmar enterprises or associations seem rarely to refer to international databanks and other forms of TI provided by international institutions. This is a result of insufficient awareness of what is available, lack of funds to purchase some databases, and inadequate staffing in the TSIs.

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1. More recently, in June 2014, MoC opened a Myanmar Trade Centre, which will allow business operators to lease the premises for showcasing export–import products and other merchandise. They can also organize seminars and meetings and set up offices there.

Box 2: Importance of trade information for building export competitiveness

Access to up-to-date market intelligence plays an integral role in a number of trade-related issues, among which are market penetration, product design and development, and standards and regulatory compliance. TI services generally include the dissemination of information related to standards, regulations and import / export requirements; raising awareness of trade-related laws and international agreements; and the publication of data about products, trends and markets.

The following is a partial list of TI services that are useful for current and emerging exporters:

- Publication of standards and regulations of target markets
- Dissemination of import and export requirements
- Publication of, and information about, trade-related laws and international agreements
- Provision of databases on domestic products and sectors, as well as on those of destination countries
- Provision of databases on market developments and trends
- Counselling of potential exporters and importers
- Conducting research and publication of studies about markets and the trade environment.

The related service of trade promotion can also enrich the TI landscape. Trade promotion involves leveraging a country's resources in order to connect with international counterparts. It assists enterprises in visiting and participating in international trade fairs and exhibitions, where firms can learn of market requirements and enrich their knowledge of the competitive landscape. Networks with foreign TSIs also facilitate the diffusion of international know-how and best practices within the domestic market. TI is important for the following aspects of market development:

- Consolidate and expand on current markets
- Identify, analyse, select and conquer new markets
- Obtain information about market developments and tendencies
- Discover and explore market niches
- Identify market segments
- Design and implement marketing plans
- Design strategies for commercial promotion and post-sales
- Structure distribution channels
- Identify current and future competitors.

Box 3: Summary of TSIs

Overall, the results collected from the surveys relating to the TSN in Myanmar indicate that there are few market-entry services provided by TSIs and that there is a high concentration of services provided by policy institutions. There is a predominance of public sector financing for TSIs. The survey results highlighted that there are possible gaps in key export services such as financial services, insurance services and trade finance / export credit.

The surveys also revealed some possible duplication in service delivery by the various TSIs, such as in areas related to training for production and improving quality; regulatory reform; certification services; market research; TI; market promotion; and policy reform.

TRADE INFORMATION INSTITUTIONAL VALUE CHAIN

The TI value chain map for Myanmar is presented in figure 1. The map depicts how information currently flows across Myanmar-based institutions, from the collection stage to the dissemination stage.

TI SOURCES

TI sources are wide-ranging. On the domestic market, they can include surveys, questionnaires, data from market exchanges, etc., from a variety of organizations, such as Customs (for actual data of overseas and border trade), MoC (licence data for overseas and border trade), the Ministry of Industry (for industrial production), the Ministry of Agriculture and Irrigation (MoAI) (for agricultural production), the Ministry of Environmental Conservation and Forestry (for forestry products), the Ministry of National Planning and Economic Development (for statistics, foreign direct investment and other production statistics). They may also include primary data collected by non-governmental organizations, universities, consultancy companies, the media or other sources. Finally, they can also include international databases and sources.

TI DATA COLLECTORS

TI data collectors comprise a range of public organizations (ministries and parastatal organizations), civil society (universities) and private sector organizations (research consultancies), who collect information from a variety of sources, mentioned above. It should be noted that there is currently only limited collection of international statistics and data from international sources.

TI CENTRES

The TI centres housed in UMFCCI and MoC are the most central organizations for TI. The main trade journal in Myanmar is the *Commerce Journal* produced by MoC. Private consultancy companies and market research organizations are also TI centres used by enterprises to carry out specific and tailored research activities.

TI END USERS

TI end users are multiple, and include:

- Enterprises which are export-ready or those wishing to enter international markets
- Potential investors and entrepreneurs seeking market information on Myanmar
- Farmers and upstream economic operators who need to adapt their production to international requirements and tastes
- Traders, who require information on supply and demand in terms of price and quantities
- Academic institutions, think tanks and policy-formulating organizations.

GOVERNMENT

The Government controls and provides the budget for the collection and dissemination of information by public sector entities. The Government also sets the policies for the channels of dissemination, as well as the methodological procedures to be met in collecting and storing data.

MEDIA

The media acts as an intermediary in the information flow, being a conduit to reach a wider constituency of users, and in some cases, to digest and analyse the data. Media also captures surveys and interviews which can also act as valuable, and often more speedily available, information on market trends.

DONOR COMMUNITY

The donor community supports the TI-providing institutions by providing training and equipment, as well as assisting with the implementation of internationally recognized standards in data collection, management, reporting and dissemination.

SUPPORTING AGENCIES

The TPD of MoC works closely with enterprises to organize trade fairs and also to assist enterprises to participate in international trade fairs. A new Myanmar Trade Centre has been established in Yangon, and includes a documentation centre, video-conferencing facilities for business to business contacts, guidance and advice for exporters and other trade promotion services. The Trade Training Institute, also attached to MoC, provides training to exporters on market entry requirements in overseas markets and market analysis tools. UMFCCI hosts a number of workshops and training seminars on market analysis, as do many of its individual sector associations and federations.

Figure 1: *Current value chain of trade information services*
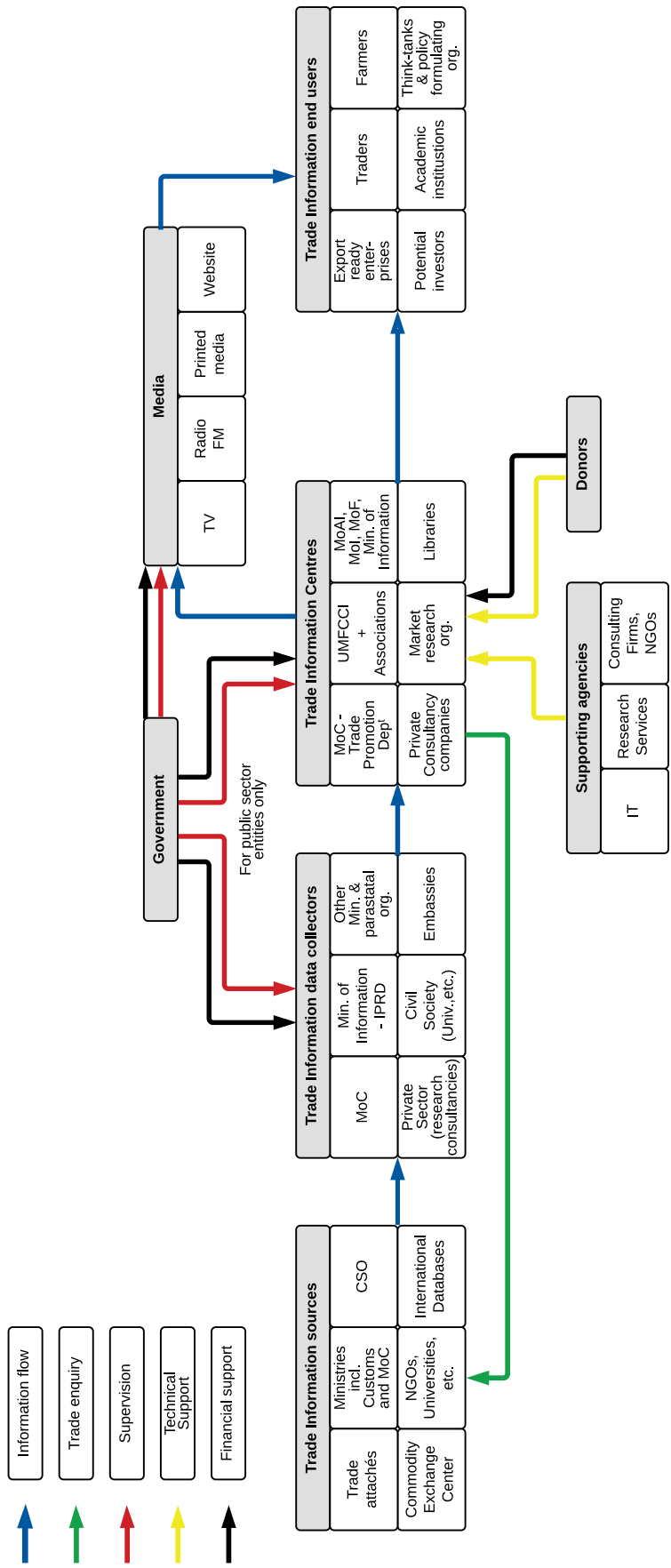
THE INSTITUTIONAL PERSPECTIVE

TSIs are institutions that have an interest in, and bearing on, the cross-sector's export development. Broadly, the TSIs providing important services to the Myanmar TI cross-sector function can be categorized in the following areas:

- Policy support network
- Trade services network
- Business services network
- Civil society network.

Tables 1 to 4 identify the main TSIs whose service delivery affect the TI framework in Myanmar. An assessment of the TSIs along four key dimensions – coordination, human capital, financial sustainability and advocacy – is provided. The ranking (high / medium / low) for each TSI was selected in the context of service delivery of the TSI relative to TI. In other words, the assessment is based on stakeholders' evaluation of TSIs from the perspective of how well they serve TI stakeholders.

POLICY SUPPORT NETWORK

This represents key ministries and authorities responsible for influencing or implementing policies affecting the cross-sector. Examples of such institutions are: the Ministry of Trade, MoAI, the Ministry of Finance and Revenue, the Ministry of National Planning and Economic Development, the Customs Department, tax authorities and the Central Bank of Myanmar.

Table 1: *Myanmar trade information policy support network*

Name of institution	Description of TSI and services provided	Coordination*	Human capital**	Financial resources***	Advocacy ****
TPD, MoC	The TPD is responsible for promoting the development of trade, including exports of commodities to foreign countries and between local buyers and sellers. Specifically in the TI function, the TPD provides: • Weekly *Commerce Journal* • Website portal • Commodity prices • Market and export information for local & international exporters (trade enquiry) • Market access information for exports • Awareness for trade promotion • Trainings / community-based programmes • Trade Information Centre (to be opened in Yangon). A European Union help desk will be included in the Trade Information Centre.	M	M	M	L
Directorate of Trade, MoC	The Directorate of Trade is responsible in the TI function for: • Trade promotion activities (fairs, business matching, TI) • Trade statistics • Trade policies • Market and export licences • Border control information • Training • Editing and publishing the *Commerce Journal*.	M	H	M	M

* Coordination with other TSIs: measures the strength of this institution's linkages with other institutions as well as the beneficiaries of their services (in particular, the private sector) in terms of collaboration and information sharing.
** Human capital assessment: assesses the general level of capability of this institution's staff in terms of their training and responsiveness to sector stakeholders.
*** Financial resources assessment: assesses the financial resources / capacity available to the institution to provide service delivery in an efficient manner.
**** Advocacy: assesses the efficacy of this institution's advocacy mechanisms, and how well / frequently this institution disseminates important information to the sector.

Name of institution	Description of TSI and services provided	Coordination	Human capital	Financial resources	Advocacy
MoAI	The functions of MoAI in the area of TI are: • To collect information on consumption trends and disseminate it to farmers; • To disseminate information on inputs, growing, harvesting and postharvest techniques; • To assist rural development through skills training and provision of technical assistance to promote agricultural development.	L	M	M	L
Department of Fisheries, Ministry of Livestock, Fisheries and Rural Development (MLFRD)	The Department of Fisheries under MLFRD is responsible for managing the country's aquaculture resources in both inland and coastal areas. The TI services include providing food safety information, guidelines for sanitary conditions required in third markets, and catch allowances.	H	M	M	M
Livestock Breeding & Veterinary Department, MLFRD	The Livestock Breeding & Veterinary Department's main function is to oversee the breeding of poultry and cattle and other livestock and to manage the health and well-being of livestock etc. The TI services it provides include breeding information and disease control.	H	M	M	M
Myanma Timber Enterprise	Myanma Timber Enterprise is responsible for the extraction, grading, milling and marketing of wood products to buyers. The Export Marketing and Milling Department of Myanma Timber Enterprise runs the teak sawmills which produce teak conversion and scantling for export markets, and manages the processing of primary and secondary timber products. It also provides specialized services in promoting efficiency in product quality assurance and value addition in the timber industry. For TI, Myanma Timber Enterprise is active in surveys of wood-based industries, and compiling and reporting data on quantities and species of wood used by private industries.	L	L	L	M
Forestry Department, Ministry of Environmental Conservation and Forestry	The main duty of the Forestry Department of Myanmar is to protect and manage natural forest resources around Myanmar. It provides information on the allowable cut levels, tender prices and amounts for the Myanma Timber Enterprise, and information on prices.	L	L	L	M
Ministry of Industry	The functions and duties of the Ministry of Industry include promoting the national production status quo and encouraging more local production of commodities to replace imports. In the TI function, the Ministry of Industry provides: website dissemination of information, information on industrial zones, and news and information for small and medium-sized enterprises.	M	M	L	M
Department of Technology Promotion and Coordination, Ministry of Science and Technology	The Department of Technology Promotion and Coordination seeks to assist in the industrialization process of Myanmar industries, and oversees the import of machinery from abroad or construction of machinery locally. It provides limited information in the form of news and industry information.	L	M	M	L

Name of institution	Description of TSI and services provided	Coordination	Human capital	Financial resources	Advocacy
Ministry of Mines	The main function of the Ministry of Mines is to manage the natural mine resources of Myanmar and provide information on commodity prices.	M	H	H	M
Food and Drug Administration, Department of Health, Ministry of Health	The Food and Drug Administration's main function is to manage the food and drug products being sold in Myanmar. It is responsible for testing and issuing licences to businesses which pass its qualifications and health standards. It is the TBT enquiry point and disseminates information on standards.	M	L	L	M
Customs Department, Ministry of Finance and Revenue	The main functions of Customs Department of Myanmar are: 1. To examine and monitor import and export of goods; 2. To examine passengers and their baggage entering or leaving Myanmar; 3. To assess and levy Customs duties; To enforce the provisions of the Sea Customs Act, Land Customs Act, Tariff Act and other related acts and laws; 4. To combat commercial fraud; 5. To ensure that all goods entering or leaving the territory of Myanmar are correctly entered in conformity with the laws and procedure of the Customs Department. In the TI function, Customs collects data on cross-border trade and reports this to the Central Statistical Organization (CSO) under the Ministry of National Planning and Economic Development.	M	M	M	L
Registration Administration, Ministry of National Planning and Economic Development	The Registration Administration department is responsible for overseeing the registration of new companies and reports on foreign direct investment figures, as well as enterprise trends.	M	L	L	L
CSO, Ministry of National Planning & Economic Development	In the TI function, CSO collects, compiles, computes, analyses and publishes national data. It produces surveys, a *Statistical Yearbook* and monthly statistics bulletins, trade data (from Customs) and investment data. CSO needs authorization to share non-public data.	L	L	L	L
Central Bank of Myanmar	The aim of the Central Bank of Myanmar is to preserve the internal and external value of the Myanmar currency, the kyat. It shares macroeconomic, investment and trade statistics and analysis, as well as publishing quarterly and yearly reviews on both the Myanmar and the world economy.	L	M	H	L

Name of institution	Description of TSI and services provided	Coordination	Human capital	Financial resources	Advocacy
Ministry of Hotels and Tourism	The Ministry of Hotels and Tourism's main duty is to promote tourism in Myanmar. The Myanmar Tourism Master Plan (2013–2020) draft came out in June 2013, published by the Ministry of Hotels and Tourism. The Ministry publishes statistics on tourism trends, provides information on itineraries and tariffs, and has a directory of operators, information on Myanmar and other resources on tourism.	M	M	M	M
Ministry of Information (MoI)	MoI policy is to inform, to educate and to entertain the people of Myanmar. It operates the following: • Myanmar Motion Picture Enterprise • Myanmar Radio and Television Department • Myanmar Information and Public Relations Department branches in all cities and townships • Myanmar News and Periodicals Enterprise (daily newspapers) • Myanmar Publishing and Printing Enterprise. It has no export/import information but it is sent information in an ad hoc manner from the Ministry of Industry or MoC. It enjoys a wide network for media dissemination.	M	M	L	L
Ministry of Foreign Affairs	The Ministry of Foreign Affairs manages and opens Myanmar embassies, Myanmar mission offices and commercial attachés in foreign countries. The commercial attachés provide limited intelligence on third markets but can provide information on intermediaries, wholesalers and retailers in other markets.	L	M	M	L

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TRADE SERVICES NETWORK

These institutions or agencies provide a wide range of trade-related services to public and private stakeholders of the cross-sector. Examples of such public or private institutions are: trade promotion organizations, chambers of commerce, sector associations, producers associations, national standards organizations, vocational training centres, free trade zones, development banks, export / import banks and other relevant agencies.

Table 2: *Myanmar trade information trade services network*

Name of institution	Description of TSI and services provided	Coordination	Human capital	Financial resources	Advocacy
Myanmar Investment and Commercial Bank	The Myanmar Investment and Commercial Bank conducts investment banking, development and commercial banking for local and foreign investors, organizations, partnership firms, joint ventures, limited companies, sole proprietorships, and exporters and importers. It provides information on loans, trade finance and interest rates.	M	M	M	L
Myanma Foreign Trade Bank	The Myanma Foreign Trade Bank accept deposits and makes advances to individuals and enterprises in addition to foreign exchange matters. Foreign exchange accounts are also available. The Bank provides information on loans, trade finance and interest rates.	M	M	M	L
Myanma Economic Bank, Ministry of Finance and Revenue	The state-owned Myanma Economic Bank disburses loans with very low interest rates for projects related to state policies. It provides information on loans, trade finance and interest rates.	L	M	L	L
Trade Training Institute, MoC	The Trade Training Institute is a non-profit training and research institution built as a public–private partnership. It was established by MoC with the purpose of trade promotion under the new Government regime. It provides training and information awareness campaigns on third market access, export strategies, business planning, trade finance, and other courses relevant to international trade.	M	M	L	M
UMFCCI	UMFCCI functions as Myanmar largest not-for-profit business federation and aims to participate in the implementation of the Four Economic Objectives of the State, and to lead and cooperate with business associations. It serves as a bridge between the state and the private sector. Its BIU has a physical library of resources, CD-ROMs, and information technology (IT) infrastructure for online consultations, newsletters on trade opportunities and other trade-related support.	M	H	H	M
Sector associations	The various sector associations affiliated with the UMFCCI provide information on prices, trends, opportunities and practices to their members. Some association also disseminate information to third parties.	M	L	L	M

BUSINESS SUPPORT NETWORK

These are associations, or major representatives, of commercial services providers used by exporters to effect international trade transactions. Examples include: association of commercial banks, association of insurance companies, association of freight forwarders, association of transport providers, association of commercial information providers, and association of packaging providers.

Table 3: *Myanmar trade information business support network*

Name of institution	Description of TSI and services provided	Coordination	Human capital	Financial resources	Advocacy
Myanmar International Freight Forwarders' Association	The main function of the Myanmar International Freight Forwarders' Association is to cooperate with the Government to promote the international freight forwarding services of Myanmar so that they are in conformity with international standards. It disseminates information on freight forwarding and its members.	M	L	M	M
Highway Freight Transportation Services Association	The Highway Freight Transportation Services Association's main function is to promote the development of freight transportation across Myanmar via national highways. It provides information on prices.	L	L	L	L
Myanmar Livestock and Fisheries Development Bank Ltd (now Global Treasure Bank)	The Myanmar Livestock and Fisheries Development Bank Ltd has changed its name to Global Treasure Bank and it provides the same full banking services – including loans, deposits, remittances etc. – as private banks. It provides TI related to financing.	M	M	M	L
Myanmar Agricultural Development Bank, MoAI	The main function of the Myanmar Agricultural Bank is to give out loans to farmers (interest rates are the same as private banks). It provides TI related to financing.	L	L	M	L
Co-operative Export–Import Enterprise, Ministry of Cooperatives	The Co-operative ExportImport Enterprise exists to seek the development of exports and imports of commodities produced by other cooperatives in areas such as agriculture and mineral products etc. It provides TI related to international trends and prices.	L	L	L	L

Table 4: *Myanmar trade information civil society network*

Name of institution	Description of TSI and services provided	Coordination	Human capital	Financial resources	Advocacy
Myanmar Library Foundation	The function of the Myanmar Library Foundation is to provide education for all. As part of broadening the horizons of the people, the Foundation has established 5,000 libraries across the nation since 2004.	M	L	L	M
Institute of Economics, Ministry of Education	The Institute of Economics acts as a tertiary education provider for postgraduate degree students in economics and other business-related subjects. It is under the supervision of the Ministry of Education. The Institute is involved in consultancy work for public and private sector clients.	M	M	L	L
eTrade Myanmar	eTrade Myanmar provides TI through a business to business portal, providing trade statistics, commodity prices, market watch information, shipping information, commodity and trade support information. It appears to be the most complete online repository of TI available in Myanmar.	M	M	L	M

CIVIL SOCIETY NETWORK

ANALYSIS OF THE TRADE SUPPORT NETWORK

These institutions are not explicitly engaged in trade-related activities. However, they are opinion leaders representing specific interests that have a bearing on export potential and socioeconomic development. Examples of such institutions are: women's organizations, the media, academia, labour unions, employers' unions, environmental groups and various non-governmental organizations.

In the case of all organizations, the level of coordination with other TSIs is weak and their functions are often seen as competing. Several organizations find themselves in competition for funds and thus do not have incentives to coordinate with each other in the provision of TI services. There is more coordination between governmental organizations. The TSI organizations are not linked to each other electronically, although the Government is working on a web portal for improving accessibility and ease in finding information. There is some coordination connecting data collectors to users, so that, for example, CSO provides data directly to other ministries and vice versa. There is limited information flowing between the private sector –e.g. chambers of commerce or associations– and the public sector, i.e. ministries. However, cooperation mostly occurs in the sense of seeking information or services from each other, rather than integrating more than one organization into a project according to their expertise.

The human capital assessment is low for most organizations. Generally speaking, none of the listed organizations have staff competent to offer comprehensive information upon request by e-mail or by phone. The TPD and the UMFCCI BIU TI unit in particular seem to be unresponsive to queries and lacking human capital. The TPD is, however, relatively active in disseminating (one way) communications on prices, exports, and production and market information through its website and journal. The Trade Training Institute offers a major channel for disseminating market intelligence skills, although this is based in Yangon alone and the participant selection process may limit the scope for everyone to benefit. UMFCCI is active in organizing workshops and information exchanges, though these are not systematic. Continued investment in human capital and improved coordination is needed in order to improve TI in Myanmar.

Financial sustainability is another problem, because of the dependence of all organizations on the Government budget and donor-funded projects, which are generally of limited duration and do not allow much space for planning for post-project periods.

The advocacy dimension is especially weak for TI services. According to stakeholder consultations, a majority of exporters feel that they are not receiving sufficiently relevant and useful TI services from TSIs.

An overview of the perception of stakeholders with regard to TSIs' influence on policymaking and their capacity to respond to stakeholder needs is presented in table 5. It is readily apparent that few institutions are perceived to be able to fully respond to their needs (x axis), and even fewer are able to influence policymaking. As such, institutional strengthening is necessary to improve the relevance and impact that TSIs can have in Myanmar.

Table 5: *Myanmar trade information TSIs – capacity versus influence*

		Capacity of institution to respond to cross-sector function's needs	
		Low	High
Level of influence on the cross-sector function	High	Myanmar Customs Brokers Association Myanmar Forestry Department Myanma Timber Enterprise	eTrade Myanmar Myanmar International Freight Forwarders' Association Myanmar Fisheries Federation Myanmar Rice & Paddy Traders Association Myanmar Pulses, Beans & Sesame Seeds Merchants Association UMFCCI Trade Training Institute Myanmar International Freight Forwarder's Association Ministry of Hotels and Tourism Food and Drug Administration Ministry of Mines Ministry of Industry Livestock Breeding & Veterinary Department Department of Fisheries Directorate of Trade
	Low	Myanmar Library Foundation Highway Freight Transportation Services Association Myanmar Perennial Crop Producers Association Myanmar Oil Palm Producers Association Myanmar Rubber Producers Association Myanmar Fruit and Vegetable Producers and Exporters Association Myanmar Garment Manufacturers Association Myanmar Farm Crop Producers Association Myanmar Marine Engineer Association Myanmar Plastic Industries Association Myanmar Mercantile Marine Development Association Myanmar Gold Entrepreneurs Association Myanmar Pharmaceutical & Medical Equipment Entrepreneurs Association Myanmar Printers & Publishers Association Myanmar Edible Oil Dealers Association Myanmar Economic Bank Myanmar Travel Association Myanmar Hotelier Association Co-operative Export–Import Enterprise Myanmar Agricultural Development Bank Ministry of Foreign Affairs Central Bank of Myanmar CSO Registration Administration, MoNPED Department of Technology Promotion and Coordination MoAI	Institute of Economics Myanmar Gems And Jewellery Entrepreneurs Association Myanmar Women Entrepreneurs Association Myanmar Livestock Federation Myanmar Industries Association Myanmar Timber Merchants Association Myanma Foreign Trade Bank Myanmar Investment and Commercial Bank Myanmar Food Processors and Exporters Association Myanmar Livestock and Fisheries Development Bank Ltd (Global Treasure Bank) MoI Customs Department Department of Trade Promotion

Table 6: *Current development projects relating to the Myanmar TI cross-sector function*

Project	Status	Funding agency / lead implementer	Expected areas of intervention
Trade Training Institute	2013–2014	JICA	Provision of resources and technical know-how in devising a trade training course for exporters in a range of areas, such as market intelligence tools, trade finance credit, market access and Customs procedures

ANALYSIS OF DEVELOPMENT ACTIVITY

The analysis of ongoing development activity in the TI function is relevant insofar as it serves to identify the main thrusts of the various development actors and their initiatives, while also identifying gaps and areas of neglect. The latter is especially important as identified gaps will be further analysed and will be addressed through specific interventions in the cross-sector's strategic PoA.

The Myanmar TI function is poorly addressed by international donors. The only international donor active in the Myanmar TI function so far has been Japanese International Cooperation Agency (JICA). Development activity dedicated solely to the issue of TI in Myanmar has been extremely limited. The most relevant programme emphasizing the need to improve TI suitable to the needs of Myanmar potential exporters and importers is an ongoing project by JICA related to providing trade training to the private sector. A summary of this project is provided in table 6.

COMPETITIVENESS CONSTRAINTS

This section identifies the most important constraints affecting the TI function in Myanmar. Constraints are identified along two dimensions – institutional and enterprise levels. Institutional constraints refer to supply-side issues related to the service delivery of TSIs to enterprises, specifically in terms of the capacities and resources available to the institutions for achieving effective service delivery. Enterprise constraints refer to demand-side issues related to infrastructure in terms of TI.

Box 4: Policy and institutional level issues in the Myanmar trade information cross-sector function

- Lack of publicly available TI
- Lack of experienced TI consultancies and research think tanks
- Poor advocacy among TI providers
- Lack of policy focus on TI
- Weak coordination among TSIs
- There is a need for a one-stop portal for TI
- Lack of information collected by TSIs on international markets
- Lack of integration of trade representations within the TI function
- Limited service focus outside Yangon

LACK OF PUBLICLY AVAILABLE TI

Given that the Myanmar economy is primarily comprised of small and medium-sized enterprises (many of them family-owned) with small budgets on average, the relevance and importance of publicly available TI is high, since these enterprises are largely unable to afford on-demand TI. TI institutions provide a public good, and the individual costs of collecting information at the enterprise level would be much greater than through a public organization.

The publicly available information in Myanmar is often unreliable and outdated. This is particularly the case for national data, owing to a lack of human and financial resources, weak technical capacity and limitations in technology. Developing timely and reliable TI will require an overhaul of the system currently in place. The International Monetary Fund is already working on improving reporting and dissemination of data, but this will require more investment in order to bridge the gaps between the needs of stakeholders and the supply of information from TSIs. Myanmar began participating in the International Monetary Fund General Data Dissemination System in November 2013, marking a major step forward in the development of its statistical system.[2]

LACK OF EXPERIENCED TI CONSULTANCIES AND RESEARCH THINK TANKS

There are a very limited number of TSIs which are specialized in business or trade consultancy, or marketing research. A handful of marketing research companies, experienced in surveys, provide some information in such areas as corporate social responsibility, investment advice or market trends. However, these services are invariably focused on the domestic market rather than international markets and there are no comprehensive business, economic or legal consultancy services provided by any company in Myanmar for the domestic market, let alone the international market. There is an important need to strengthen the capacity of local research organizations to provide pragmatic and policy-oriented advice to firms and public sector organizations.

POOR ADVOCACY AMONG TI PROVIDERS

To the average user of TI, there is poor understanding as to the available sources of TI and which organizations can provide advice. In this regard, TI providers must improve advocacy and communication levels to inform users about available services. Detailed and sector-specific

information is mostly provided only to members of a TSI or on demand. Public information published on websites in the form of databases, export guides, studies and reports must be better advertised to stakeholders. TI providers do not advertise their services in an efficient manner, nor is the information they have available well-organized and disseminated to target stakeholders. There seem to be insufficient resources allocated to designing and updating websites within the organizational structure of TI providers.

LACK OF POLICY FOCUS ON TI

At present, the TI cross-sector function has not been addressed in any governmental plans, legislation, studies or development programmes. There has been a lack of governmental leadership in terms of TI. The lack of policy focus related to TI also contributes to the existing gaps. In the absence of clear-cut directions on distribution of responsibilities that can be integrated into the mandates of TSIs, many TSIs are not taking up the necessary activities.

It is expected that specific references and interventions related to TI will appear in national development plans. The PoA aims to redress the current absence of plans by producing measurable and targeted activities, which have the overarching goal of strengthening the TSN.

WEAK COORDINATION AMONG TSIS

Overall, the TSN suffers from weak coordination among the TSIs, including among TSIs responsible for TI. TSIs are generally unaware of the activities and capacities of other TSIs. Private sector TI providers are particularly poor at coordinating and collaborating. Since the gaps are enormous, there is a strong case for increasing collaboration and running joint programmes in this cross-sector. The PoA proposes a number of activities to create strong synergies between TSIs and promote strong cooperation among players, both to improve the quality of information and its diffusion. A number of activities are specifically targeted at coordination between TSIs.

THERE IS A NEED FOR A ONE-STOP PORTAL OF TI

Enterprises wishing to access TI currently rely on a variety of uncoordinated Government agencies and institutions. Although much of the data that they need may in fact be available, it is difficult to track down and likely to be outdated. The fragmented nature of the TI infrastructure, in which TI is spread across multiple sources that are disconnected and unsynchronized with each other, is a significant issue. As a result, companies are often left frustrated by their inability to navigate a complex web of institutional data sources.

2. International Monetary Fund (2013). Myanmar begins participation in the IMF's general data dissemination system, Press Release No. 13/449, 14 November.

There is an urgent need to develop a one-stop shop that is a comprehensive source of reliable TI. This resource, which would collect and organize all relevant data in one location, would become the focal point for TI. Such a solution would provide easy and quick access to data on market trends, market requirements, regulations, business events (e.g. trade fairs) logistics, import/export procedures, Customs duties, consumer trends in target markets, market opportunities, TSIs, etc.

LACK OF INFORMATION COLLECTED BY TSIS ON INTERNATIONAL MARKETS

As mentioned previously, there are no TSIs systematically collecting TI on international markets, analysing and synthesizing it into useful strategy documents for businesses in Myanmar. There is nevertheless an urgent need for such institutions in order for Myanmar to export to new markets and develop new products, as well as adapt to changing market conditions overseas.

LACK OF INTEGRATION OF TRADE REPRESENTATIONS WITHIN THE TI FUNCTION

The trade representations in consulates and embassies abroad are in an ideal position to collect valuable market intelligence and trends in target markets in which they are present and feed this information back to TI providers for dissemination to enterprises. Moreover, trade representations can play a key role in promoting businesses abroad, informing them about trade fairs in their region and trying to link investors to businesses in Myanmar. However, this communication between the Ministry of Foreign Affairs and TSIs is weak. The feedback loop between consulates/trade representations and national TI providers must be formalized. A network of TI providers will need to be linked with consulates/trade representations in order to assess capabilities and assign responsibilities.

Training will also play an important part in this regard. Officers at consulates and trade representations will need training in the kind of information needed and the sources to tap into, as well as how frequently to feed this information back to TSIs.

LIMITED SERVICE FOCUS OUTSIDE YANGON

The TI network needs to reach constituents in Mandalay and Yangon, but also rural areas outside of the large cities. These areas are largely neglected because providers primarily focus on the TI needs of Yangon. Yet data and information could be disseminated through regional chambers of commerce, the network of antennas belonging to MoI, and MoC regional offices. Moreover, other channels such as radio, which is already used by MoAI, could be used. The use of mobile networks could also be explored, and forms part of the activities in the PoA.

Box 5: Enterprise level issues in the Myanmar TI cross-sector function

- Lack of knowledge on what kind of information is required in an export marketing strategy
- A general lack of networking, alliances and cross-pollination of information among enterprises
- A lack of integration of TI within the decision-making framework of enterprises

LACK OF KNOWLEDGE ON WHAT KIND OF INFORMATION IS REQUIRED IN AN EXPORT MARKETING STRATEGY

Myanmar companies are often not fully aware of what is available and what information is useful in devising an export strategy. The lack of consultancy services to help guide enterprises within the myriad of TI sources available internationally leads many enterprises to not be proactive in seeking new markets. A comprehensive capacity-building programme is needed to create awareness of the content required in TI and the way in which to market and diffuse such information.

A GENERAL LACK OF NETWORKING, ALLIANCES AND CROSS-POLLINATION OF INFORMATION BETWEEN ENTERPRISES

The low levels of networking channels in Myanmar, as well as the lack of resources in most associations and chambers, contribute to the lack of collaboration on TI. For instance, chambers of commerce facilitate cross-pollination of information by organizing networking events. However, these events are infrequent and additional forums for exchanging information between enterprises, as well as between Myanmar and international enterprises, are needed.

A LACK OF INTEGRATION OF TI WITHIN THE DECISION-MAKING FRAMEWORK OF ENTERPRISES

As a result of Myanmar's isolation, its enterprises have catered to the regional market and consequently have not relied on TI as a means of generating competitiveness. Until now, enterprises have been largely unaware of the benefits of having reliable TI. Moreover, traditionally it was a buyer's market and foreign representatives negotiated contracts in Myanmar, where information on international conditions was limited.

With Myanmar's drive to become a competitive and outward-oriented economy, TI will play an important role in helping enterprises succeed in international markets. However, this change will require effort and a change of mindset in order to integrate TI into the decision-making frameworks of enterprises that are seeking to enter or expand in the export value chain. The one-stop portal, activities to extend the reach of information, and improving the relevance of TSIs (activities addressed in the PoA) are expected to promote the use of TI in decision-making processes.

WHERE WE WANT TO GO

As discussed, TI is a significant component of developing export competitiveness across Myanmar. Both the quality and availability of TI are weak. Coordination among TSIs is either ad hoc or non-existent in most cases, and has led to redundancies in some places and gaps in service delivery in other areas. Advocacy at the institutional level is also in need of improvement. These and other constraints pose significant barriers to entry for exporters in Myanmar and will need to be addressed as soon as possible. With that in mind, the following vision has been developed for the TI cross-sector function.

> " Enable export-led growth by providing timely trade information to stakeholders throughout the value chain. "

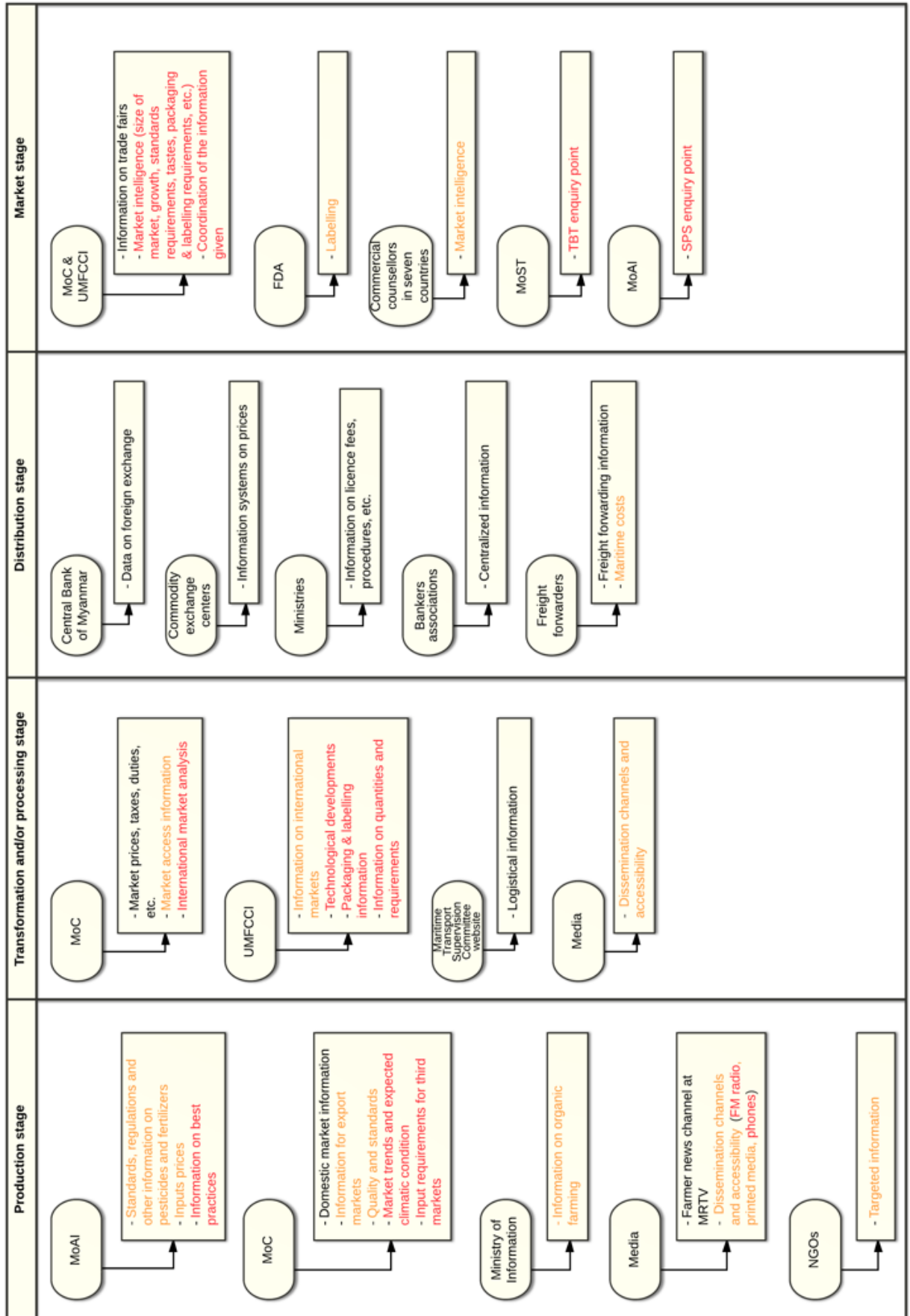## FUTURE TI SERVICE DELIVERY TO VALUE CHAIN STAKEHOLDERS

Figure 2 provides a snapshot of the expected service delivery of key TSIs according to the different stages of the value chain. Those TI sources listed in black are already provided, while those in orange are currently provided in a partial manner and those in red are new services to be provided. The result of the implementation of the PoA is to widen the breadth of constituents who benefit from TSI services and to deepen and increase the scope of services provided.

The proposed future TSI network would be segmented and specialized along the value chain of economic operators engaged (or predisposed to engage) in exports. At the production stage, a number of TSIs would give crucial information on international or regional mandatory and voluntary standards, sanitary and phytosanitary standards or TBT requirements, packaging, labelling and other requirements. The TSI network would also provide key information on the demand of foreign markets.

A variety of technologies are proposed for the diffusion of information, from radios and television to printed media and web portals.

At the transformation and processing stage, TSIs also play a crucial role for diffusing information on such measures as Good Manufacturing Practices, International Organization for Standardization standards, Hazard Analysis and Critical Control Points, and other internationally adopted standards. The TSIs would also provide transportation and logistics information, packaging and labelling requirements, and market demand. At the distribution stage, international market information, trade finance, transportation, and wholesale and distribution information would be provided. Finally, at the market stage, market intelligence, Customs and other key market requirements would be provided.

Figure 2: *Trade information services to be provided in the future across the export value chain*

Production stage	Transformation and/or processing stage	Distribution stage	Market stage

Production stage

MoAI
- Standards, regulations and other information on pesticides and fertilizers
- Inputs prices
- Information on best practices

MoC
- Domestic market information
- Information for export markets
- Quality and standards
- Market trends and expected climatic condition
- Input requirements for third markets

Ministry of Information
- Information on organic farming

Media
- Farmer news channel at MRTV
- Dissemination channels and accessibility (FM radio, printed media, phones)

NGOs
- Targeted information

Transformation and/or processing stage

MoC
- Market prices, taxes, duties, etc.
- Market access information
- International market analysis

UMFCCI
- Information on international markets
- Technological developments
- Packaging & labelling information
- Information on quantities and requirements

Maritime Transport Supervision Committee website
- Logistical information

Media
- Dissemination channels and accessibility

Distribution stage

Central Bank of Myanmar
- Data on foreign exchange

Commodity exchange centers
- Information systems on prices

Ministries
- Information on licence fees, procedures, etc.

Bankers associations
- Centralized information

Freight forwarders
- Freight forwarding information
- Maritime costs

Market stage

MoC & UMFCCI
- Information on trade fairs
- Market intelligence (size of market, growth, standards requirements, tastes, packaging & labelling requirements, etc.)
- Coordination of the information given

FDA
- Labelling

Commercial counsellors in seven countries
- Market intelligence

MoST
- TBT enquiry point

MoAI
- SPS enquiry point

HOW TO GET THERE

The vision of the strategy to "Enable export-led growth by providing timely trade information to stakeholders throughout the value chain" responds to the constraints, but equally to the ambitions, identified in the cross-sector strategy. The following section explains the framework that will guide the implementation of the strategy. A detailed action plan setting out what needs to be done, and by whom, is presented at the end of this section.

STRATEGIC OBJECTIVES

Stakeholders consider that four strategic objectives are necessary to realize the cross-sector vision and address both challenges and opportunities facing the TI cross-sector function in Myanmar.

1. **Improve the collection of TI.** This objective will be realized through initiatives implemented along the following dimensions:
   – Improve methodological aspects of data collection;
   – Improve collection of private sector information;
   – Improve the TI infrastructure (IT and human resource-related) for collecting and systematizing information.

2. **Improve the reach and relevance of TI within Myanmar.** This objective will be realized through initiatives implemented along the following dimensions:
   – Expand existing geographical and thematic coverage by media;
   – Include new partners in the dissemination of information;
   – Create a one-stop portal for information dissemination;
   – Engage directly with grass-roots people to collect and disseminate crucial information.

3. **Improve the quality and timeliness of TI.** This objective will be realized through initiatives implemented along the following dimensions:
   – Improve timeliness of TI provision;
   – Add value to the information through analysis and commentary.

4. **Increase coordination and collaboration among TSIs in Myanmar.** This objective will be realized through initiatives implemented along the following dimensions:
   – Create and establish focal points for the TI network;
   – Once this is achieved, strengthen the TI network;
   – Ensure the sustainability of the TI network.

IMPORTANCE OF COORDINATED IMPLEMENTATION

The achievement of these ambitious targets will require continuous and coordinated efforts from all relevant private and public stakeholders as well as support from key financial and technical partners, donors and investors. Several institutions are designated to play a leading role in the implementation of the sector PoA and bear the overall responsibility for successful execution of the strategy. They will be assisted by a range of support institutions that are active in the TI cross-sector function. Each institution mandated to support the development of the cross-sector is clearly identified in the strategy PoA.

Moreover, the Myanmar Trade Development Committee and its Executive Secretariat will play a coordinating and monitoring role in the implementation of the TI cross-sector strategy in the overall framework of the National Export Strategy. In particular, the Myanmar Trade Development Committee is tasked with coordinating the implementation of activities in order to optimize the allocation of both resources and efforts across the wide spectrum of stakeholders.

THE **REPUBLIC OF THE UNION OF MYANMAR**
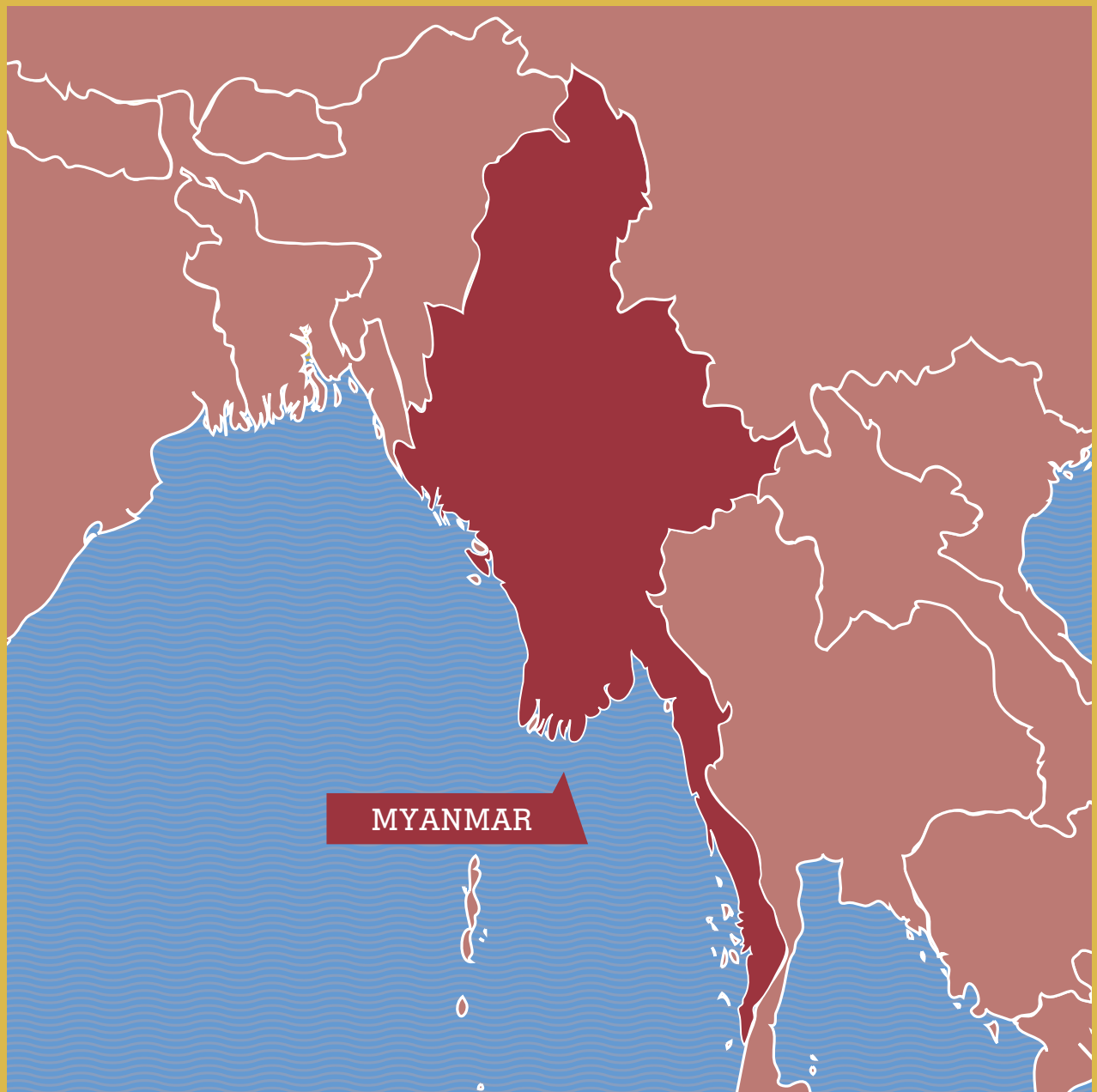## NATIONAL EXPORT STRATEGY
TRADE INFORMATION
CROSS-SECTOR STRATEGY 2015-2019

PLAN OF ACTION

The following action plan details all the activities to be undertaken over the next five years to achieve the vision of the strategy. The action plan is organized around strategic and operational objectives that respond to the constraints and opportunities identified in the document. The action plan provides a clear and detailed framework for the effective implementation of the Trade Information strategy.

MYANMAR

Strategic objective 1: Improve the collection of TI.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
1.1 Improve methodological aspects of data collection.	1.1.1 Define comprehensive guidelines for data collection to be provided to the private sector, including definitions, nomenclatures and sources. Guidelines include assignment of responsibilities and timelines.	3	TSIs	» Publication of guidelines » Timelines are set » Responsibilities are assigned	MoC	MoI, UMFCCI, Ministry of Finance and Revenue, JICA, CSO		50 000
	1.1.2 Provide training in market information research to key service providers, including sources of information and databases.	3	TSIs	Training workshops for representatives of TSIs conducted on a half-year basis	UMFCCI	Market research agencies and consultancies, Trade Training Institute, ITC		150 000
	1.1.3 Set up a special task force to be used at the pre-collection stage to improve the quality of source information. The team will involve representatives from both the private and public sectors.	3	TSIs	» Establishment of the task force » Structure and functions defined and written down	MoC	UMFCCI, market research agencies		100 000
1.2 Improve the collection of private sector information.	1.2.1 Collect trade regulatory information from professional associations and other relevant TSIs. Organize and disseminate the information collected though online channels.	2	Private stakeholders	Regulatory information is comprehensive and easily accessible online	BIU of UMFCCI	TPD, Directorate of Trade, associations, members of UMFCCI		100 000
	1.2.2 Develop an annual directory of exporters and importers in Myanmar, including auxiliary service providers such as freight forwarders and Customs agents, distributors, transporters, etc. The directory should contain company profiles (including but not limited to: names of directors, number of staff, year of establishment, membership in professional organizations, markets where they are active).	2	Traders and service providers involved in international trade	» Production of an annual directory » Company profiles available on website	BIU of UMFCCI	TPD, Directorate of Trade, MoC		30 000
	1.2.3 Regularly collect and publish information on the business environment and investment (actual and intended levels of investment), using alternative sources to those of the Directorate of Investment and Company Administration (DICA) and CSO – e.g. via surveys – for domestic and foreign investment intention and actual investment.	2	Stakeholders	Investment survey data is published quarterly	UMFCCI	MoC, associations, DICA, CSO		100 000
	1.2.4 Conduct surveys at Customs borders in order to collect information on intention to export and business confidence. This activity can be conducted in trade centres and Customs borders with Thailand, China, Bangladesh and India.	1	Information collectors	Business confidence surveys & trade estimates are published on a quarterly basis	Mobile teams (Department of Commerce and Consumer Affairs)	Customs Departments of neighbouring countries, CSO		150 000
1.3 Improve the TI infrastructure (IT and human resource-related) for collecting and systematizing information.	1.3.1 Establish an electronic interface to collect and register national exporters' complaints in their experience of exporting to third markets. This information can serve as a basis to adopt trade facilitation measures and improve market access conditions for exporting firms through commercial diplomacy.	2	Exporters	Establishment of the database of reported market access complaints, to be updated on a monthly basis	BIU of UMFCCI	TPD, Directorate of Trade, exporters and associations		150 000
	1.3.2 Establish a trade enquiry system in the BIU of UMFCCI in order to improve the effectiveness and efficiency with which the BIU manages the enquiries received by assessing response rates, response time to enquiries, follow-up actions and relevance of the responses provided.	2	TSIs, exporters, and people interested in exporting	» Installation of an operational trade enquiry system » Statistics on types of enquiries, frequency and response rates	BIU of UMFCCI	TPD, Directorate of Trade, associations		75 000
	1.3.3 Process and publish online the documentation obtained from public events on trade (workshops, seminars, conferences, fairs, etc.) by implementing partners. This activity implies the introduction of computers connected to the Internet and a server in the regional offices of the TPD (MoC) and of the Information and Public Relations Department of MoI.	2	Exporters, emerging exporters	» Additional staff recruited in the implementing institutions » Training programmes » Information collected, comprehensive and easily accessible online	DTP, Directorate of Trade	BIU of UMFCCI, other departments of UMFCCI, associations, members of UMFCCI, MoI		75 000

Strategic objective 2: Improve the reach and relevance of TI within Myanmar.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
2.1 Expand existing geographical and thematic coverage by media.	2.1.1 Develop a strategy to improve the dissemination of TI in printed media with a particular focus on reaching rural communities. This will include consultations and surveys to identify demand and study feasibility of different channels.	3	Private stakeholders	Development of a national strategy for TI dissemination in printed media	News and Periodicals Enterprise (under MoI), MoC	Newspapers, MoI	State and private newspapers, journals	100 000
	2.1.2 Develop a strategy to better reach the target audience for trade-related programmes in broadcast media (radio and television). This includes compiling statistics on listeners and viewers of broadcast media (radio and television) and using monitoring tools, undertaking surveys and consultations, and preparing a pilot phase.	2	Private stakeholders	» Development of a national strategy for TI dissemination in broadcast media » Collection of statistics on listeners and viewers and time spent on different programmes	MoI	Broadcasting entities	Eight FM lines, 10 television channels (Traders Channel, like Farmers Channel)	60 000
2.2 Include new partners in the dissemination of information.	2.2.1 Develop a strategy to disseminate TI through mobile networks. This will include consultations and surveys to identify demand, and a study on the feasibility of using mobile telephony. Try a pilot before launching the strategy.	1	Private stakeholders	» Establishment of mobile information services » Number of persons reached	MoC	MoAI, telecoms companies, Myanmar Post and Telecommunications		100 000
	2.2.2 Develop a strategy to disseminate TI through new organizations and institutions, including, but not limited to: Myanmar Agricultural Development Bank, the Trade Training Institute (MoC), and Myanmar Farm Enterprise. These organizations can help in spreading information to producers and traders. The preparation of the strategy will include consultations and surveys to identify demand, and a study on the feasibility of using different institutions based on their relevance and comparative advantage. Try a pilot before launching the strategy.	2	Private stakeholders	Dissemination of TI through new information providers	MoC	MoAI, MLFRD, Business Information Group, eTrade, commodity exchange centres, etc.	Trade text messages provided by eTrade Myanmar such as currency rates, commodity prices and TI	100 000
	2.2.3 Conduct training workshops for new information providers (consulting firms, research organizations, research departments in ministries) on how to analyse, interpret and present (display) TI.	2	Information providers	» Train new members of TSIs » Conduct training on a quarterly basis	MoC	MoI, consulting firms		80 000
2.3 Create a one-stop portal for information dissemination.	2.3.1 Establish a joint task force to prepare guidelines for the web portal through a memorandum of understanding between different TI providers to supply updated information to contribute to the one-stop portal on a monthly basis. Determine which services will be provided under a fee basis and which will be free.	1	TSIs, enterprises, emerging exporters	» Protocol established about all TSIs providing TI for centralized website on a monthly basis » Establishment of the task force and preparation of the guidelines	MoC	UMFCCI, private consultancies or companies		50 000

Strategic objective 2: Improve the reach and relevance of TI within Myanmar.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
2.3 Create a one-stop portal for information dissemination.	2.3.2 Establish a focal web portal to be the central gateway for TI services in a user-friendly manner, for example: » Market access information » Myanmar's trade agreements » Business events, trade shows and workshops, conferences in Myanmar and around the world » Interactive guides on how to export » Publications, e.g. newsletters » Contact information for the regional offices of MoC » List of exporters and importers with contact information » Logistics » Market trends. Prepare a marketing campaign to promote awareness of the portal to be diffused through printed and social media.	1	Enterprises, emerging exporters	Recruit two additional well-qualified administrators of the portal Creation of the web portal	MoC	UMFCCI, embassies, Customs		170 000
2.4 Engage directly with grass-roots people to collect and disseminate crucial information.	2.4.1 Develop an information exchange system with community leaders in rural areas to identify the most relevant channels to collect and disseminate TI in these areas. Study the legal conditions for collecting and sharing the information, the incentives for such an information exchange, the technology required, and the steps to achieve such a framework.	2	Community leaders, TSIs		MoC	MoI, MoAI, private media, local community leaders		100 000
	2.4.2 Develop an information exchange framework with civil society organizations to collect and disseminate TI. Study the legal conditions for collecting and sharing the information, the incentives for such an information exchange, the technology required, and the steps to achieve such a framework.	2	Civil society organizations, information collectors		MoC	MoI, donor agencies		60 000

Strategic objective 3 : Improve the quality and timeliness of TI.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
3.1 Improve the timeliness of TI provision.	3.1.1 Establish an alert system that facilitates the exchange of information between the authorities and private sector stakeholders on measures taken to prevent or restrict the use of products that can be harmful to human, plant or animal health, in particular insecticides and pesticides for the agricultural and forestry products sectors. This would be achieved through mobile networks and by using the registry of farmers and producers.	2	Small farmers and enterprises	Establishment of the alert system Alert system	MoAI	MoI, Agrochemicals Association		150 000
	3.1.2 Develop a national programme for data computerization, including the definition of standards for better TI data dissemination.	3	TSIs	Development of a strategy for data computerization and dissemination	MoC	Commercial attachés UMFCCI, MoI, Myanmar Post and Telecommunications	International Monetary Fund in the field of macroeconomic statistics, European Union with Comext	150 000
	3.1.3 Establish an IT system / infrastructure to ensure that data can be transmitted to the right channels in an expeditious manner.	3	TSIs	IT network is established	MoC	UMFCCI, Myanmar Post and Telecommunications, MoI, all line ministries	One-stop service for investors exists (Myanmar Investment Commission) – use as a model to scale up	300 000

Strategic objective 3 : Improve the quality and timeliness of TI.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
3.2 Add value to the information provided through analysis and commentary.	3.2.1 Organize training workshops for TSI representatives on data collection and data processing (relevance, quality and reliability of the information, methodology used, tools, etc.).	3	TSIs	Organization of training workshops on a quarterly basis	MoC (International TPD)	UMFCCI, Customs, consultancies and law firms		80 000
	3.2.2 Develop a strategy to improve the availability of information on third market requirements for exports, from information collection to dissemination. The strategy would be based on best practices and would survey stakeholders and experts in the field.	2	Exporters and emerging exporters	Better access to third market requirements for current and potential exporters	MoC (International TPD)	UMFCCI, related ministries and commercial attachés		60 000

Strategic objective 4 : Increase coordination and collaboration among TSIs in Myanmar.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
4.1 Create and establish focal points for the TI network.	4.1.1 Upgrade the Ministry of Commerce's trade promotion department into a Trade Promotion Organisation, as a stand-alone organisation similarly to other ASEAN countries, to act as a key focal point for the trade information network.	1	TSI and enterprises	» Concept and business plan of the TPO developed, » Required legislation establishing the TPO passed, » TPO established and adequately resourced » Increased visibility for Myanmar products in foreign markets, » Increased Myanmars' export performance	MoC	MoF, MoNPED		10 000 000
	4.1.2 Establish Trade Information Centres for private stakeholders at the district level. The Centres will be instructed to collect all relevant information from trade associations and other TSIs, and will guarantee that the information is made available to end users, whether in electronic, paper or other formats. They could be positioned in MoC regional offices and be Internet-based, or have CD-ROMs or printed materials.	3	Exporters, enterprises	Trade Information Centres are operational	TPD (MoC)	UMFCCI, 38 trade associations	Fourteen Trade Promotion Information Service Centres in all states / regions, 41 existing commodity exchange centres across Myanmar	750 000
	4.1.3 Establish a focal point for the TI network to enhance cooperation with the Trade Information Centres and facilitate information exchange. The focal point will play a key role in informing private stakeholders about the network (awareness campaigns, press releases, visibility materials, etc.) The focal point could be positioned in the Myanmar Trade Centre.	2	TSIs, exporters	Establishment of the focal point	MoC	Other ministries and all private sector chambers	Directorate of Trade, DICA	150 000
	4.1.4 Establish Information Centres for agriculture at the township level. These Centres would primarily aim at informing farmers about production methods, pesticides and insecticides used, standards, market access requirements, etc. They could be positioned in MoAI regional offices and be Internet-based, or have CD-ROMs or printed materials.	2	Enterprises	Establishment of Centres in townships	MoAI, Department of Agriculture Research	Myanmar Rice Federation, Myanmar Fruit and Vegetable Producers and Exporters Association		500 000

Strategic objective 4: Increase coordination and collaboration among TSIs in Myanmar.

Operational objective	Activities	Priority 1=high 2=med 3=low	Beneficiaries	Targets	Leading implementing partner	Supporting implementing partners	Existing programmes or potential support	Estimated costs (US$)
4.2 Once operational objective 4.1 is achieved, strengthen the TI network.	4.2.1 Expand the scope of the information available on the web portal, including information on local production, associations, business and investment opportunities, certification and standards, etc.	2	Enterprises	» Creation of the web portal » Information available and comprehensive	TPD	UMFCCI, foreign chambers of commerce, commercial attachés, Myanmar embassies and missions		60 000
	4.2.2 Develop a trade enquiry support system for the TI network aimed at providing adapted and comprehensive responses to trade enquiries from local and foreign sources.	2	Enterprises	» Development of a trade enquiry support system » Evaluate the effectiveness of support provided through surveys	TPD	UMFCCI, foreign chambers of commerce, commercial attachés, Myanmar embassies and missions		100 000
4.3 Ensure the sustainability of the TI network.	4.3.1 Maintain active cooperation and coordination of key partners in the TI network by strengthening working relationships and communications between stakeholders from various ministries and associations. This could be secured through a memorandum of understanding or a more formal contract.	3	TSIs	Recruitment of at least one person per member of the TI network, responsible for the network	MoC	All ministries and associations		100 000
	4.3.2 Build sustainable partnerships with local and overseas TI agencies (through joint programmes, Memorandums of Understanding or formal contracts) and other relevant organizations to improve the network's technical know-how and to benefit from their experience (data-collection systems, network systems, market research systems, and/or training and capacity-building initiatives).	2	TSIs	Development of partnerships with foreign TI agencies and transfer of knowledge	MoC	UMFCCI, TI from United Kingdom Trade & Investment, ITC and the Japan External Trade Organization, and technical support from IT companies		500 000

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