



THE REPUBLIC OF THE UNION OF MYANMAR
Ministry of Commerce

Medium Term Programme (MTP) for Coordinated Aid-for-Trade Resource Mobilization and Delivery

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In partnership with:



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Enhanced
Integrated
Framework

WHAT IS A MEDIUM TERM PROGRAMME (MTP)?

The main objective of an MTP is to clarify the priorities set out in a DTIS Action Matrix (AM) and other existing plans with a strategic and medium term approach to programming and a clear connection to the core national development and economic growth strategy(ies), as well as to elaborate on necessary policy reforms.

It is a key ingredient in mainstreaming trade in a country's national development agenda. As such, the MTP supplements and builds upon the different national trade development plans endorsed by the Government over the past months.

Typically, MTP for LDCs have the following characteristics:

- ✓ cover a 3 to 5-year period;
- ✓ cover a large part, if not all, of the AfT programme (excluding large infrastructure);
- ✓ provide a clear prioritization and sequencing of activities and projects;
- ✓ be fully owned by the country
- ✓ be validated by the NSC and subsequently either by cabinet or by the Ministries responsible for trade,
- ✓ include and account for regional integration processes as well as at the WTO;
- ✓ be realistic in coverage and size with agreement from the donor facilitator and donor partners about an indicative resource envelope;
- ✓ be fully costed; and
- ✓ include an effective Monitoring and Evaluation framework.

The critical role of the MTP within the EIF conceptual framework is to link the DTIS and other trade plans to the core national development plan in order to successfully mainstream trade; to set up sustainable structures to deliver effectively on the Aid-for-Trade promised and through the activities supported by the programme, to implement policy and regulatory reform to build a country's capacity to trade and address critical supply-side constraints.

The MTP therefore follows a programmatic approach in which each activity or project is clearly related to the overall objectives. This involves assessing the inter-relationship of activities at the implementation level.

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ABBREVIATIONS AND ACRONYMS

ACIA	ASEAN Comprehensive Investment Agreement
ACU	Aid-for-Trade Coordination Unit
ADB	Asian Development Bank
AEC	ASEAN economic Community
AFAS	ASEAN Framework Agreement on Services
AFTA	ASEAN Free Trade Area
ADB	Asian Development Bank
ASEAN	Association of South East Asian Nations
ASW	ASEAN Single Window
ATIGA	ASEAN Trade in Goods Agreement
BMZ	Germany Federal Ministry for Economic Cooperation and Development
CBM	Central Bank of Myanmar
CIF	Cost Insurance and Freight
CLMV	Cambodia, Lao PDR, Myanmar and Vietnam
CSO	Central Statistical Organization
DACU	Development Aid Coordination Unit
DFAT	Department of Foreign Affairs and Trade (Australia)
DFID	Department for International Development (UK)
DICA	Directorate of Investment and Company Administration
DICD	Department of Industrial Crops Development
DNSQ	Department of National Standards and Quality
DoF	Department of Fisheries
DTIS	Diagnostic Trade Integration Study
EBA	Everything-But-Arms Initiative
EIF	Enhanced Integrated Framework
EITI	Extractive Industries Transparency Initiative
EU	European Union
FDA	Food and Drug Administration
FDI	Foreign Direct Investment
FIQCD	Fish Inspection and Quality Control Division
FLEGT	Forest Law Enforcement, Governance and Trade
GIZ	German Agency for International Cooperation
GOM	Government of Myanmar
GSP	Generalized System of Preferences
GVC	Global value Chain
HACCP	Hazard Analysis and Critical Control Points
ICD	Inland Container Depot
ISO	International Standardization Organization
ITC	International Trade Centre
ITES	Information Technology-Enabled Services
IWT	Inland Waterway Transport
JICA	Japan International Cooperation Agency
KOICA	Korea International Cooperation Agency
L/C	Letter of Credit
LBVD	Livestock Breeding and Veterinary Department
LDC	Least-Developed Country
LPI	Logistics Performance Index
MAFPEA	Myanmar Agro-Based Food Processors and Exporters Association
MoALI	Ministry of Agriculture, Livestock and Irrigation

MAST	Multi-Agency Support Team
MFF	Myanmar Fishery Federation
MGE	Myanmar Gem Entrepriese
MGJEA	Myanmar Gem and Jewelry Entrepreneurs Association
MGMA	Myanmar Garment Manufacturers Association
MIC	Myanmar Investment Commission
MITS	Myanmar Inspection and Testing Services
MNDAA	Myanmar National Democratic Alliance Army
MNSQ	Myanmar National Standards and Quality Department
MoC	Ministry of Commerce
MoCST	Ministry of Construction
MoE	Ministry of Education
MoEE	Ministry of Electricity and Energy
MoH	Ministry of Health
MoHA	Ministry of Home Affairs
MoHT	Ministry of Hotels and Tourism
Moi	Ministry of Industry
MoLIP	Ministry of Labor, Immigration and Population
MoNREC	Ministry of Natural Resources and Environmental Conservation
MoPF	Ministry of Planning and Finance
MoTC	Ministry of Transport and Communications
MPA	Myanmar Port Authority
MPBSMA	Myanmar Pulses, Beans & Sesame Seeds Merchants Association
MRA	Mutual Recognition Agreement
MRPPA	Myanmar Rubber Planters and Producers Association
MSTFBTP	Myanmar Special Task Force for Business and Trade Promotion
MTF	Myanmar Tourism Federation
MTP	Medium Term Programme for Aid-for-Trade
NACA	Network of Aquaculture Centres in Asia-Pacific
NES	National Export Strategy
NDS	National Development Strategy
NSW	National Single Window
NTM	Non-Tariff Measures
NTMC	Non-Tariff Measures Committee
OECD	Organization for Economic Co-operation and Development
PSDC	Private Sector Development Committee
RCEP	Regional Comprehensive Economic Partnership
ROO	Rules of Origin
SDC	Swiss Agency for Development and Cooperation
SEAFDEC	Southeast Asian Fisheries Development Center
SECO	Swiss State Secretariat for Economic Affairs
SEZ	Special Economic Zone
SMEs	Small and Medium-Sized Enterprises
SOE	State-Owned Enterprise
SPS	Sanitary and Phytosanitary Measures
TBT	Technical barriers to Trade
TFA	Trade Facilitation Agreement
TMP	Tourism Master Plan
TTSC	Textile Training and Support Centre
TVET	Technical and Vocational Training
UMFCCI	Union of Myanmar Federation of Chambers of Commerce and Industry

UMTA	Union of Myanmar Tourism Association
UNCTAD	United Nations Conference on Trade and Development
UNIDO	United Nations Industrial Development Organization
UNSD	United Nations Statistics Division
USAID	United States Agency for International Development
WFP	World Food Programme
WTO	World Trade Organization
WTTC	World Travel and Tourism Council

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The preparation of this report was led by Mr. Sven Callebaut under the supervision of Mr. Sjamu Rahardja and drawing inputs from Mr. Min Ye Paing Hein.

Myanmar became a member of the EIF in 2012. Since then, the Ministry of Commerce has developed the necessary arrangements for the programme to play a catalytic role in donor coordination and resource leveraging for Aid-for-Trade. Medium Term Programmes (MTP) are crucial tools within the EIF conceptual framework to link the DTIS and other trade plans to LDCs' core national development plan in order to successfully mainstream trade. Regular consultations with the EIF Executive Secretariat during the MTP formulation process have ensured that the MTP could benefit from best practices from the EIF partnership.

The Myanmar MTP is solely based on the actions contained in seven core trade development plans prepared and launched in the past two years.

The work was funded by The Australian Department of Foreign Affairs and Trade (DFAT) and the UK Department for International Development (DFID) through Myanmar MDTF managed by the World Bank. The EIF Executive Secretariat also provided support in facilitating discussion during the 2016 WTO Public Forum, in Geneva, Switzerland on September 29th 2016.

FOREWORD

Following Myanmar's dramatic decision to change its trajectory, the boom in trade and investment has boosted average economic growth beyond 7 percent per year as the country starts to catch up with its neighbors. Myanmar has been focusing on the many new opportunities opened by its re-integration in the global trade system and the introduction of the ASEAN Economic Community. The 12 Key Economic Policy targets launched in August 2016 are a testimony of the importance the Government of the Republic of the Union of Myanmar has placed in sustainable and equitable development goals that trade can strongly contribute to.

On June 20, 2016 H.E.U MyintSwe, Vice President of Myanmar launched the first ever Myanmar Trade Integration Strategy using the very welcoming "Opening for Business" motto to highlight Myanmar's trade development aspirations. The Myanmar DTIS launch concluded a cycle that witnessed the development and launch of key trade reforms plans, itself signaling the strong commitment of the Government of Myanmar to leverage trade as an engine for growth.

The Ministry of Commerce has spearheaded efforts towards a more integrated approach for the development of the trade sector and coordination of Aid for Trade in Myanmar since 2013. In January 2016, the Ministry of Commerce requested technical support from the World Bank Group in Myanmar to work with the newly created Aid-for-Trade Coordination Unit of the Department of Trade to prepare a Medium Term Programme (MTP) for Aid-for-Trade.

The MTP takes stock of recent trade development, prioritize areas of needed support and sequence desirable trade-related technical assistance for the next five years. As a result of the work by MoC and World Bank team, the MTP has identified five priority reform areas, 23 key clusters and 181 indicative actions for the period 2016-2021.

Through the prioritization of actions in 23 clusters, the Medium Term Programme should better position Myanmar to respond to the challenges and opportunities provided by deepening regional integration and fast changes in the global economic landscape that are giving the Asian region increasing prominence. Its successful implementation will depend on the concerted actions and contributions – financial, human, and technical – of Myanmar stakeholders in government, the private sector, civil society, or academia well as among development partners.

The Government of the Republic of the Union of Myanmar sees trade as an important tool for inclusive growth. Trade-led development is within Myanmar's grasp if we can seize the moment to design and apply appropriate policies to encourage trade and economic openness, and ensure that all stakeholders in the country's future can share in the benefits. The recent creation of the Private Sector Development Committee and of the Trade and Investment Working Committee will provide the necessary framework for an inclusive dialogue and cooperation with all stakeholders.

The Ministry of Commerce is fully committed to continuing dialogue and coordination of Aid for Trade in the country and further strengthening accountability, transparency and participation in the formulation, implementation and monitoring and evaluation of Aid for Trade programs.

In closing, I would like to thank the World Bank and the EIF Programme for their collaboration with MoC on this effort and the DFID (UK) and DFAT (Australia) for financing this endeavor. I would also like to encourage all of our development partners to join us in the months ahead in a healthy dialogue on how best they can help Myanmar in addressing the nineteen Clusters identified in the MTP.

H.E. Dr. Than Myint
Union Minister for Commerce

THE MYANMAR MEDIUM TERM PROGRAMME AT A GLANCE

Linking Trade Development Agenda with Government Development Priorities

Following a successful political transition, the Government in July 2016 launched 12 economic policy objectives that are expected to guide priorities for economic reforms and investment in public infrastructures, and consistent with Government's priority to achieve progress on national reconciliation (peace process). The policy objectives are also in line with Government priorities to promote linkage between agriculture sector and the rest of the economy, provide level playing field for talented entrepreneurs, and ensure development process that is inclusive for Myanmar citizens.

TABLE 1: MYANMAR ECONOMIC POLICY TARGETS

1. Establish strong and transparent public finance management	7. Create more level playing field and dynamic environment for private sector businesses and facilitate FDI
2. Support SMEs to create jobs, SOE reform and privatization	8. Improve access to finance for households and small businesses
3. Strengthen human resource capacity	9. Create urban environment with more public space, improve public services, and preservation of cultural heritage
4. Accelerate development of priority infrastructures and introduction of e-government	10. Improve tax system
5. Create more job opportunities for returning migrant and create higher value jobs	11. Strengthen legal and institutional basis to promote innovation
6. Raise exports and facilitate linkages between development in manufacturing and agriculture	12. Ensure businesses gain from greater regional economic integration in ASEAN and others

The Government recently established a new Development Aid Coordination Unit (DACU). This Committee is chaired by the State Counselor, Daw Aung San Suu Kyi with members from Government agencies and supported by international advisers. DACU is expected to strengthen coordination of activities supported by development partners (DPs) to ensure synergy, complementarity and alignment with Government's priorities.

In this regard, Myanmar trade development agenda should be well aligned with those priorities and supportive to the achievement of those 12 objectives. Myanmar is at a crossroad of its trade development and, in continuing, of its participation in the Aid-for-Trade initiative, as exemplified by the increasing flows of donor pledged and commitments to Myanmar trade development. Over the past 15 months, at least seven national or sectoral trade-related development plans or framework have been endorsed and launched by the Government (see Table 2):

- Diagnostic trade integration study (DTIS)
- National Export Strategy (NES)
- Master Plan for Establishment of Myanmar Trade Promotion Organization (MYANTRADE)
- Private Sector Development Framework and Action Plan (PSDF)
- Gap Assessment for WTO Trade Facilitation Agreement (TFA)
- Gap Assessment on ASEAN Trade in Goods Agreement (ATIGA)
- Development of SPS Management and Capacity

TABLE 2: MYANMAR TRADE DEVELOPMENT PLANS

PLAN	DESCRIPTION
<p><i>The Diagnostic Trade Integration Study - DTIS (2016)</i></p>	<p>A cornerstone tool of the Enhanced Integrated Framework (EIF), the Diagnostic Trade Integration Study (DTIS) has the following general objectives: (i) to assist the government in mainstreaming trade and competitiveness in the country’s overall development strategy; (ii) to provide a diagnostic and analytical tool to prioritize and sequence key reforms in the area of trade and competitiveness; and (iii) to provide a platform for development partners to coordinate action and align trade-related assistance with government priorities.</p> <p>This Myanmar DTIS has identified a number of domestic and external constraints facing Myanmar as it strives to leverage regional and global integration for inclusive, export-led growth. The report provides analytical input on the linkages between trade and poverty, and highlights key steps to remove bottlenecks in terms of trade policy and trade facilitation.</p>
<p><i>The National Export Strategy - NES (2015)</i></p>	<p>The main objective of the National Export Strategy (NES) is to promote export development and the competitiveness of Myanmar’s products in international markets. The NES provides a multi-sector coordination framework between the public sector Ministries and institutions with the private sector representatives from exporters to business associations. The NES has five strategic objectives are: i) Foster sustainable, inclusive and equitable export growth ii) Ensure a consistent, predictable and transparent policy, legal and regulatory framework. iii) Develop competitive, diversified and branded exports; iv) Build modern, enabled and supportive institutions; v) Build up physical trade infrastructure. Seven sectors were selected to be included in the NES design initiative: rice; pulses, beans and oilseed; fish and crustaceans; textiles and garments; rubber; tourism; and forestry products. Cross-sectors representing broader capacity issues have also been selected: access to finance; trade information; quality management; and trade facilitation and logistics. The NES secretariat uses a strategy implementation Management Tool (SIMT) in tracking and monitoring the implementation of the NES sectors.</p>
<p><i>Master Plan for Establishment of Myanmar Trade Promotion Organization – MYANTRADE (2016)</i></p>	<p>The Master Plan was produced in October 2016 to give Myanmar a one-stop shop for its trade promotion function. The mission of Myantrade is to create Myanmar’s national competitive edge by playing out the role of a platform for Myanmar businesses. Myantrade aims to make Myanmar a champion of not only neighboring South-East Asian countries, but also in all New Frontier countries across the globe by performing a central role by way of trade promotion. Core duties of Myantrade includes a focus on export promotion, realization of trade and business hub and the establishment of the Myanmar Brand. The Master Plan includes detailed analysis of export potential of products not covered in the NES, such as gems & jewels and agro-food products.</p>
<p><i>The Private Sector Development Framework and Action Plan - PSDF (2016)</i></p>	<p>The preparation of this indicative Private Sector Development (PSD) Framework and Action Plan aimed to produce a coherent, high-level approach for pursuing Myanmar’s PSD agenda that builds on core policies, visions, and principles; gives due consideration to Myanmar’s unique context; and incorporates global best practice and lessons learned. It has also been designed to fill the gap between stakeholders’ vision and current</p>

	<p>realities/practices, recognize the constraints faced by business, and serve as a transition roadmap for the new government.</p> <p>The PSD Framework and action plans is divided in three parts: (i) A “snapshot” of the government’s policy directions and reforms relating to the development of an overall PSD framework based on five priority pillars, (ii) a comprehensive review of current PSD policy and initiatives for each of the five priority pillars that identifies gaps, inconsistencies, and key challenges and (iii) a forward-looking indicative PSD policy framework, reform strategy, and institutional mechanisms for implementation</p>
<p><i>The WTO Trade Facilitation Agreement - TFA (2016)</i></p>	<p>The Republic of the Union of Myanmar notified the country’s ratification of the WTO Trade Facilitation Agreement in December 2015. The TFA contains provisions for expediting the movement, release and clearance of goods, including goods in transit. It also sets out measures for effective cooperation between customs and other appropriate authorities on trade facilitation and customs compliance issues.</p> <p>Myanmar categorized in June 2015 all the trade facilitation measures into one of three categories in accordance with specific timelines. These categories are as follows: (i) Category A: provisions that Myanmar designates for implementation by the time the Agreement enters into force (LDC countries have an additional year) (ii) Category B: provisions that Myanmar designates for implementation after a transitional period of time after entry into force of the Agreement and (iii) Category C: provisions that Myanmar designates for implementation after a transitional period of time following the entry into force of the Agreement and requiring the acquisition of implementation capacity through the provision of assistance and support for capacity building.</p>
<p><i>The ATIGA Gaps Assessment Report (2016)</i></p>	<p>The ASEAN Trade in Goods Agreement (ATIGA) entered into force on 17 May 2010, consolidating all regional commitments related to trade in goods and bringing greater legal certainty and transparency to trade liberalization and facilitation efforts within the ASEAN region. The ATIGA Gaps Assessment overall purpose is to assist the Government of Myanmar in assessing its current progress in in the implementation of the commitments and obligations under the ATIGA. The gaps assessment identified 100 questions, in total, across the 96 Articles of the ATIGA. Implementing gaps were identified in relation to more than 30 articles, grouped thematically in terms of: a) transparency; b) technical barriers to trade (TBTs); c) sanitary and phytosanitary measures; d) customs; and e) trade facilitation.</p> <p>The report provides a ‘<i>commitments matrix</i>’ relative to the commitments made by Myanmar in 2010 as a signatory to the ATIGA. The report then lists practical and policy recommendations for Myanmar to consider, as well as potential technical assistance requirements identified by officials in Myanmar in areas where potential gaps are known to exist.</p>
<p><i>Developing SPS management capacity in Myanmar (2016)</i></p>	<p>The report is part of a larger programme support SPS development in Myanmar. It aims to provide ways and means for Myanmar to take advantage of enhanced connectivity in the GMS. Over the past two decades, increased connectivity has enhanced the growth of trade among GMS countries. However, many factors, including weak institutional and operational capacity to manage Sanitary and Phytosanitary (SPS) measures,</p>

	<p>have hindered the optimal use of infrastructure and the full realization of the sub region’s trade potential. The report proposes a step-by step approach over the next 10 years for Myanmar to develop an SPS management capacity. For implementing the WTO SPS Agreement and their regional commitments the GMS countries need to improve their national capacity in SPS management so that they can more effectively cooperate and build confidence in each other’s systems. National level capacity development needs to proceed hand in hand with initiatives at the regional level to strengthen cooperation and harmonization.</p>
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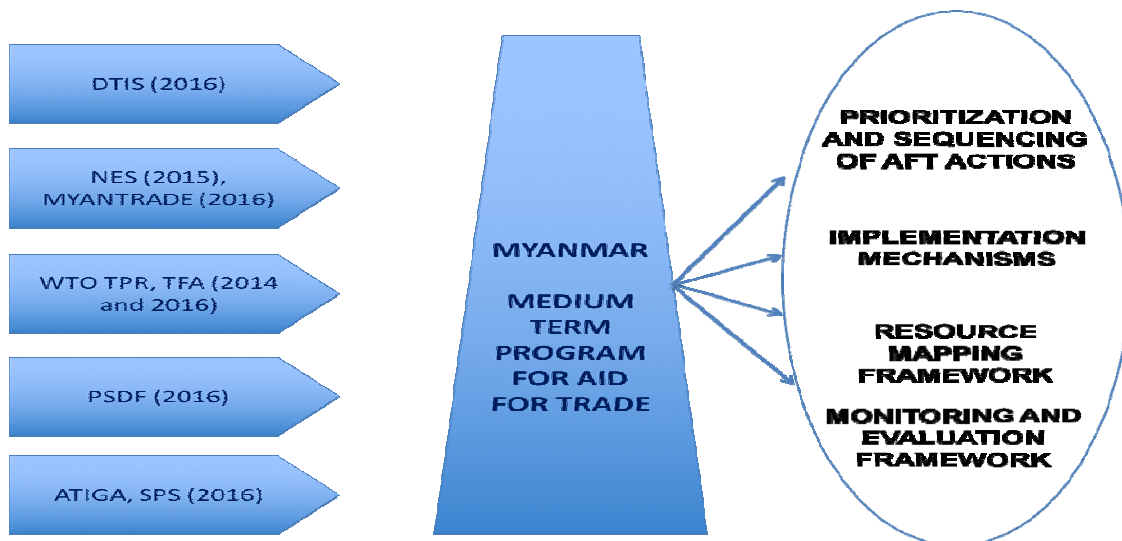
The MTP benefited as well from the work carried out by the Government of the Union of Myanmar in 2013-2014 for the formulation of Myanmar TPR report. Several recommendations made in the seven reference documents complemented and reinforced those found in the 2014 TPR report, in particular under the WTO Trade Facilitation Agreement and the DTIS.

This Medium Term Programme (MTP) aims to provide a foundation for accelerating the implementation process and to help mainstream trade into national development priorities. The overall guidance framework and national implementation arrangements for aid-for-trade in Myanmar are new. Similarly, the implementing arrangements within the Ministry of Commerce and even more so within the agencies involved in trade-related activities are in a nascent stage. As such, it is still very demanding for MoC, in particular the newly formed Aid-for-Trade cooperation unit, to follow, monitor, track and report on the implementation and, further impact of each individual national trade development plans.

Following significant consultations with trade-related stakeholders across Government, donor partners and the private sector, the MTP seeks to provide a sound basis for the prioritization and sequencing of necessary reforms and activities, along with a rational and effective method for their implementation. Just as all future planning requires some degree of flexibility, we also anticipate the MTP’s evolution over the coming years, adapting itself to short-term priorities, new information, and milestones achieved. Nevertheless, it is expected that this MTP will remain a guiding force in Myanmar’s trade competitiveness development for many years to come.

OVERVIEW

Diagram I: schematic view of the MTP inputs / outputs



The diagram I above graphically summarizes what the MTP intends to achieve. Using the seven key trade development plans selected by MoC and described above, the MTP seeks to prioritize and sequence, in a single document, all relevant priority actions for the medium term, e.g. 3 to 5 years, in line with Myanmar' programming cycle.

METHODOLOGY

Developing the Myanmar MTP in a way that ensures Government ownership (in particular that of MoC), comprehensiveness, in a user-friendly way has involved the following steps:

- Stage 1: Initial Review (January 2016)
- Stage 2: Preparation for developing a MTP (February 2016)
- Stage 3: Process of agreeing on the prioritization of actions (March-April 2016)
- Stage 4: Implementation responsibilities (May-July 2016)
- Stage 5: Resource requirements to implement the MTP (May-July 2016)
- Stage 6: Implementation mechanism (May 2016-July)
- Stage 7: Monitoring and evaluation (August-October 2016)
- Stage 8: Communication to and review by Government partners (November 2016)
- Stage 9: Final draft and review (January 2017)

To ensure that the MTP can be as up-to-date as desirable, the cut-off date for its formulation has been set at October 31, 2016.

The objective of this document is to formulate a medium term programme for Aid-for-Trade to serve as the basic document for carrying out activities listed as priorities in the seven national trade development plans described above. **It is important to underscore that the MTP is intended to complement the existing policies, plans and strategies already adopted by GoM, not replace them.** It shall provide a clear and unique institutional framework in tandem with the seven national development plans listed above.

In particular, this document includes the following parts:

1. **Prioritization and Sequencing**—It is necessary at the outset to align the MTP's interventions with the seven trade development plans in terms of priority and sequencing of activities where possible, and coordinate its overall structure with relevant agencies outside of MoC. Then, it is important to sequence the implementation of actions, possible in three different tiers, eg (i) immediate to one year, (ii) one to three years' timeframe and (iii) three to five-year timeframe.

Benefits:

- *Highlight and prioritize actions under the responsibility of MoC for the next 1, 3 and 5 years and filter this through the relevant MoC departments.*
- *Reach out and keep DPs engaged on the implementation of key trade policy reforms*
- *Ensure that all new development partners align and harmonize their future programmes and projects to the MTP*

2. **Implementation Mechanism**— The MTP requires the establishment of an implementation mechanism within the Government, responsible for coordinating and monitoring the implementation of the various activities identified by the MTP and corresponding national trade development plans. The MTP thus needs to be fully owned by the newly created Myanmar Special Task Force for Business and Trade Promotion(MSTFBTP), involving Ministries and

agencies responsible for trade and, for official development assistance, with the donor partners. Implementation and monitoring of MTP implementation should be led by the AFT Coordination Unit (ACU, Department of Trade, MoC) on behalf of the MSTFBTP, working closely with other officials from MoC and line ministries, private sector representatives, as well as with the donor partners. All these stakeholders need to be involved to varying degrees in the development of the MTP. It is important to identify at the outset of the process the key players from the above institutions so they can be fully engaged in the process.

Benefits:

- *Adjust adapt MoC structure to be better aligned with its multilateral, regional engagements and to the country's trade development agenda and reform programmes*
- *Create additional capacity to absorb new trade-related technical assistance programme*
- *Consider the adoption of innovative tools such as Programme-Based Approaches, Sector-Wide Approach a for increased efficiency, transparency and accountability*

3. **Resource Mapping**– The MTP intends to provide a framework for aligning the various external partners and donors with whom GoM has been working in the formulation of the different national development plans (eg World Bank, ADB, EU, GIZ, DFID, DFAT, KOICA, JICA, UN agencies, etc.). Some of the activities listed in the above-mentioned national development plans may already be under way while others may not attract any immediate interest from DPs. MoC should ensure through the MTP resource mapping that duplication of efforts and resources with DPs and among Government agencies is avoided. In that context, the ACU should liaise with the different committees supporting the implementation of the seven individual trade development documents, such as the 11 sector implementation Committees – SICs under NES.

Benefits:

- *Engage with existing DPs, new DPs and non-traditional DPs around a set of reforms and priorities*
- *Discuss options for aligning DPs and Government programming cycles*
- *Get knowledgeable on the multiple aid modalities available (multilateral, bilateral, regional, trust funds, grants, loans, matching grants, capital investment, etc.)*

4. **M&E Framework**– Finally, the MTP aims to provide a robust yet flexible monitoring and evaluation framework to provide for the timely and accurate tracking of priority activities and their intended results.

Benefits:

- *Report to MSTFBTP, Ministry of Planning and Finance and Development Partners on MTP progress implementation and, consequently major policy reforms*
- *Inform OECD/DAC questionnaire on Aid-for-Trade*

CATEGORIZATION, PRIORITIZATION AND SEQUENCING

Given the wide range of interventions proposed by seven trade development policy documents used as a reference for this MTP, it would be unrealistic and potentially counterproductive to attempt to implement all of these simultaneously. Rather, the nature and substance of the actions plans contained in all seven documents have required an MTP which contextualizes and prioritizes activities based on a set of criteria defined with the Ministry of Commerce, as well as a logical sequencing of these activities.

Methodology: Categorization

The categorization of the MTP priorities was carried out in accordance with standards set by the MoC Aid-for-Trade Coordination Unit (ACU). Each recommended action within the seven trade development documents was categorized along the following themes:

- **Pillar I: Trade Policy and Institutions**– Activities which aim to amend specific policies and regulatory regimes to improve incentives, improve intra-governmental coordination, and enhance human and institutional capacity of trade-focused public institutions
- **Pillar II: Trade Facilitation, Transport and Logistics**-- Activities where the primary goal is to lower the financial cost of trading borne by exporters and importers;
- **Pillar III: Quality Infrastructure and Standards**– Activities which focus on increasing the quality of Myanmar products in order to meet importing countries requirements and ensure safety of consumers
- **Pillar IV: Private sector development** – Activities which support private sector stakeholders through targeted trade finance, access to information and capacity building activities
- **Pillar V: Value Chain Development and Export Diversification**– Activities which focus on the development of priority sectors in agriculture, industry and services for export diversification and targeting poverty reduction

Each pillar represents a key development axis for Myanmar trade. Each Pillar includes a set of key reform areas, aligned with similar reform areas found in the 6 above-referenced trade development document action plans as detailed below:

TABLE 3: MTP PILLARS AND CLUSTERS

Pillar I:	Pillar II :	Pillar III:	Pillar IV:	Pillar V:
Trade Policy and Institutions	Trade Facilitation, Transport and Logistics	Quality Infrastructure and Standards	Private Sector Development	Value Chain Development and Export Diversification
I.1 Institutional Reforms	II.1 Trade Facilitation	III.1 Quality Infrastructure	IV.1 SME Development	V.1 Rice
I.2 Regulatory Framework and Transparency	II.2 Trade Facilitation Agreement (WTO TFA)	III.2 Sanitary and Phytosanitary Measures (SPS)	IV.2 Access to Trade Finance	V.2 Beans, Pulses and Oilseeds
I.3 Trade in Goods	II.3 Transport Infrastructure and Logistics		IV.3 Access to Trade Information	V.3 Corn
I.4 Trade in Services				V.4 Fruits and Vegetables
				V.5 Agro-food processing
				V.6 Fisheries
				V.7 Forestry
				V.8 Rubber
				V.9 Garment
				V.10 Gems & Jewels
				V.11 Tourism

DISCLAIMER:

The objective of the prioritization and sequencing work carried out during the development of the MTP is to ensure that the MTP becomes a reference document for the Ministry of Commerce in its role as coordinator of the country's Aid-for-Trade agenda. The MTP will need to be revisited regularly so as to ensure that it remains up-to-date and valid. It will important to measure how much activities remains to be implemented, indicate whether additional support is needed wherever relevant. The MTP includes actions to be implemented first and foremost by the Government of Myanmar and shall not be treated as a "project catalogue" or a "donor matrix". While some actions will require Development Partner support, it is primarily the responsibility of the Government of Myanmar to ensure that sufficient resources are available -in the Government, through the private sector and using donor funding- when other resources are not available.

As mentioned earlier, the main documentary sources for prioritization of the MTP were the seven trade development documents described in Table 2. While the documents taken together include more than 500 actions classified and categorized using different criteria (levels of priority, difficulty in implementation, actions required by the Government, time, budget availability, etc.), the MTP seeks to reduce the number of priorities on the basis of a simple set of criteria.

It is therefore possible that some emergent reform areas or issues addressed by on-going trade-related technical assistance projects are not addressed in this first MTP. This is because those areas and issues, while certainly important, are not covered in any of the seven reference documents used to produce this MTP "Enhancing Sub-Regional Integration for Addressing Issues of Common Interest". As a result, all the 181 actions listed in the MTP are coming from existing trade development documents and their selection has been endorsed by the ACU upon proposal of the MTP formulation team.

The MTP does not replace or supersede any of the seven documents used as a reference. As each of the corresponding action plans have been endorsed and/or launched by the Government, it is expected that all the actions contained in these plans will be implemented. The MTP is to be used as a guidance framework by the Government of Myanmar in its efforts to accelerate and sequence the country's trade development.

TABLE 4: MOC DIRECT CONTRIBUTIONS TO THE REPUBLIC OF THE UNION OF MYANMAR TWELVE ECONOMIC POLICY STATEMENT (SEPTEMBER 2016)

#	POLICY STATEMENT	Activities on Trade Sector	Responsible Entity / Departments
2	Improving the operations of state-owned enterprises, and privatizing those state-owned enterprises that have the potential to be reformed, while promoting and assisting small and medium enterprises as generators of employment and growth	<ul style="list-style-type: none"> a) To implement Private Sector Trade Development b) To support on implementation activities that can bring improved market access for the Industrial products of Small and Medium Enterprises c) To formulate and implement the financial assistance programs for trade related enterprises 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP) / Department of Trade
3.	Fostering the human capital that will be needed for the emergence of a modern developed economy, and improving and expanding vocational education and training	<ul style="list-style-type: none"> a) To implement fostering human capital for trade sector b) To implement the development of trade-related technical training 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade
4.	Prioritizing the rapid development of fundamental economic infrastructure such as electricity generation, roads, and ports, and establishing a data ID card system, a digital government strategy, and an e-government system	<ul style="list-style-type: none"> a) To implement the wide usage of updated database and communication technology for the development of trade related businesses/ enterprises b) To implement and coordinate for the development of fundamental economic infrastructure required for trade related businesses/ enterprises c) To implement the development of e- government system 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade
6.	Establishing an economic model that balances agriculture and industry, and supports the holistic development of the agriculture, livestock and industrial sectors, so as to enable rounded development, food security, and increased exports	<ul style="list-style-type: none"> a) To support and implement the promotion of value-added export products of Myanmar b) To implement the activities to increase existing market share and new market access for increased export products c) To reduce the limitations that are barriers to export promotion d) To implement activities for ease of domestic trade flow and to permit import for the consumer products, if necessary, for food security purpose e) To implement the development of special economic zones 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade
7.	Asserting the right of individuals to freely pursue the economic opportunities they choose, so as to enable private sector growth in line with a market economy system; formulating specific policies to increase foreign investment; and strengthening property rights and the rule of law	<ul style="list-style-type: none"> a) To support on competition with equal opportunities to enable private sector growth in line with a market economy system b) To implement activities for consumers to get the consumer goods with best value for money service and safest c) To implement trade remedies concerned activities for domestic businesses/ enterprises 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade

8.	Achieving financial stability through a finance system that can support the sustainable long-term development of households, farmers and businesses	a) To implement Trade Financing Programs for the purpose of promoting export and domestic products of agriculture and small and medium businesses/enterprises	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade
11.	Establishing technical systems and procedures to support intellectual property rights that can encourage innovation and the development of advanced technology	<ul style="list-style-type: none"> a) To formulate and implement programmes that encourage competitive trade and business environment in local and export markets, increase trade facilitation, increase innovation for exports and product diversification and implement quality management system b) To implement activities for enhancing trade related knowledge c) To implement and support on protecting intellectual property rights that can encourage innovation d) To implement and support the effective registration programmes for protecting cases relating to counterfeiting trademark. e) To develop supporting institutions related to Intellectual Property Services. 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade
12.	Identifying the changing and developing business environment both in ASEAN and beyond, so as to enable our own business to situate themselves to take advantage of potential opportunities	<ul style="list-style-type: none"> a) To implement and coordinate for Regional Integration with ASEAN, WTO, GMS, AEC for promoting trade in regional and international markets b) To implement the coordination with neighboring countries for increase of border trade and establishment of special economic zones. 	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)/ Department of Trade

TABLE5:MYANMAR ECONOMIC POLICY – INDICATIVE MTP LINKAGES

ECONOMIC POLICY TARGETS	MTP Pillars				
	Trade Policy and Institutions	Trade facilitation, transport and logistics	Quality infrastructure	Private Sector Development	Value Chain Development and Export Diversification
1. Strong and transparent public finance management		Reforms in customs practices through implementation of WTO TFA	Establish a network of laboratories in order to pool resources, and proceed to test comparisons.		
2. Support SMEs to create jobs, SOE reform and privatization		Review of policies to promote public private partnership in logistics infrastructures	Promote industry-led product certification	<ul style="list-style-type: none"> • Streamline requirements for starting companies • Review of SME policies • Support implementation of Competition Law and Policy 	<ul style="list-style-type: none"> • Promote industry led product certification • Export promotion strategy and implementation
3. Strengthen human resource capacity	Capacity building for dedicated teams in MOC	Training and workshops Support for coordination mechanism for trade and private sector development			
4. Accelerate development of priority infrastructures and introduction of e-government	Implementation of WTO-TFA	<ul style="list-style-type: none"> • Development and implementation of NSW • Strengthen management of border posts • Streamlining and automation of trade permits • Improve efficiency in port logistics and link port and hinterland through waterways 		<ul style="list-style-type: none"> • Review of law and institutional arrangements and rapid feasibility assessment of SEZs 	
5. More job opportunities for returning migrant and create higher value jobs				<ul style="list-style-type: none"> • Opening up services trade • Facilitating innovation and entrepreneurship 	Support tourism sector development

				• Promote domestic e-commerce	
6. Raise exports and facilitate linkages between development in manufacturing and agriculture	Implement NES through a collaborative Public/private framework	Promote development of logistics infrastructures (logistics park, warehousing, etc.)			Facilitating agro-business value chain
7. Create more level playing field and dynamic environment for private sector businesses and facilitate FDI				Implement new Investment Law and develop implementing regulations	
8. Improve access to finance for households and small businesses				Promote development of trade financing instruments	
9. Create urban environment with more public space, improve public services, and preservation of cultural heritage					Destination management in tourism development
10. Improve tax system					
11. Strengthen legal and institutional basis to promote innovation			Review of laws and institution on product quality and standards	Review on laws and regulations constraining innovation	
12. Ensure that businesses gain from greater regional economic integration of ASEAN and others		Implementation of ATIGA			Support in regional value chains in agro-business and manufacturing

MTP PRIORITIZATION AND SEQUENCING

This section aims to provide an initial categorization and prioritization of the recommended actions in the DTIS Action Matrix. This exercise has been undertaken following wide-ranging consultations with stakeholders implicated in the DTIS Action Matrix, with the goal of gathering input on which actions should be prioritized and sequenced over others (and more broadly to confirm that the DTIS Action Matrix has remained both comprehensive and achievable).

Out of the more than 500 recommended actions in the seven trade development documents used as a reference for the MTO, a majority were relatively straightforward to categorize using the above pillars. Although useful for providing sector context, these actions however vary widely in levels of detail, prioritization of interventions, and emphasis on rational sequencing of interventions. In some cases, the prioritization of certain activities is clear, and has been reflected in the Prioritization and Sequencing Plan below. In other cases, there is no strong indication of sequencing or prioritization, which led to them not being considered in the tables below

The proper sequencing of the recommended actions is complicated by two factors. First, many of the individual recommended actions are very broad in scope (i.e. “Maximize the export potentials of rice”), while others are singularly specific in terms of the actions required (i.e. “Provide training on ATIGA to MoC officials”). Secondly, many of the recommendations are already in various stages of implementation across Government agencies, thus re-sequencing can potentially create confusion or send mixed signals to those agencies which are already undertaking the recommended actions.

The Prioritization and Sequencing chapter attempts to resolve these issues by treating individual reform areas separately, and assigning priority “values” based on the following parameters, in order:

- Contribution to the Government Economic Policy Targets (see above table)
- Logical sequencing of related activities
- Complexity and logical sequence of activities

These three qualifying criteria are not consistent across all activities, and in some cases, one element will be outweighed by a countervailing one. Nevertheless, the MTP Prioritization and Sequencing Plan represents a first attempt to sequence all recommended actions along these general lines. Of the more than 500 actions present in the seven reference documents, the MTP has kept only 178 actions, that represent a large enough selection to ensure impact if implemented while making the tasks of resource mobilization, implementation, monitoring of evaluation more realistic for the Ministry of Commerce and partner agencies.

The MTP Prioritization and Sequencing Plan has taken a two-tiered approach to sequencing:

1. **Tier 1** reflects those activities are rather straightforward in completion, have been considered as having high priorities in several trade development documents and/or are logically sequenced prior to other related activities.
2. **Tier 2** reflects those activities which have a substantial connection to the *Agenda for Prosperity*, but are less bureaucratically straightforward, or do not have precise and readily-achievable results indicators and/or rely on prerequisite activities in Tier 1 to move forward.

Tier 1 Priorities

Reform Areas	Proposed Action
Pillar 1: Trade Policy and Institutions	
Institutional Reforms	Narrow gaps in legislations, review incentives, mandate and organizational structure of trade-relevant departments
	Thorough trade institutions reforms, reorganizing the roles and responsibilities assigned to its trade-related ministries and departments, so as to more efficiently address its regional trade obligations.
	Strengthen the Myanmar Trade Development Committee and its secretariat to support trade promotion and implementation of the National Export Strategy
Regulatory Framework and Transparency	Assign NTM/Trade-facilitation committee (NTMC) to review selected NTMs have clear objectives around protecting safety, social norm, environment, and public health and procedures
	Formulate a comprehensive Myanmar Trade Law
	Training on the identification, collection, classification and notification of NTMs
	Accelerate the reform of the licensing system by reviewing the remaining non-automatic licenses and exercise more liberalizations and giving Yangon office more autonomy and decision making power for license issuing
	Publish and clarify regulatory processes and rules to enable businesses to comply, reduce regulatory discretion, and promote fair competition
	Remove unnecessary procedures and practices through consultations with stakeholders (e.g. advance income tax for export, restrictions for foreign companies to import)
Trade in Goods	Conduct tariff rationalization
	Myanmar's ATR/NTP/NTR obligations under the ATIGA
	Reconcile the ASEAN Harmonized Tariff Nomenclature (AHTN) 2007 and AHTN 2012, as well as with respect to the implementation of Myanmar's licensing system;
	Capacity building on recording and classifying trade data on HS-system and consolidation of data for normal and border trade and in SEZs
	Capacity building on improving quality of trade statistics and enhancing up-to-date statistics" in the area of trade in goods.
	Publish clear guidelines on trade and customs procedures/regulations on the ASEAN National Trade Repository
	Training on negotiation techniques with respect to international trade agreements. Engage in FTA negotiations (e.g. RCEPT) and build capacity in trade negotiation for all relevant departments (not limited to MoC)
Trade in Services	Institutional framework for coordination and oversight in service trade
	Services regulatory review
	Services licensing for tourism
	Identify regional MRAs that Myanmar has yet to implement and the extent to which these could be trade facilitating;
	Training on negotiation techniques with respect to international trade agreements. Engage in FTA negotiations (e.g. RCEPT) and build capacity in trade negotiation

Pillar 2: Trade Facilitation, Transport and Logistics	
Trade Facilitation	Streamlining/harmonization, use of IT, implementation of WTO Customs Valuation Agreement
	Reviewing existing Customs and other trade-related department legislation and assisting in writing a new National Customs Code.
	Reduce cost/time for customs clearance in line with sub-regional, regional, and international commitments
	Strengthen border and inland enforcement to decrease the 'grey market' trade (goods imported without paying proper duties)
	Provide training to staff at government institutions involved in customs and trade facilitation on the use of basic office software, in order to raise the ICT skills. Some software and skills is required through TA for customs but also some ministries.
	Establish a National Trade Facilitation Committee, including private sector participants, to oversee implementation of the WTO Trade Facilitation Agreement, Cross Border Trade Facilitation Agreement, and cargo clearance procedures
Trade Facilitation Agreement (WTO TFA)	A4.1 Right to Appeal or Review
	A5.2 Detention
	A6.2 Specific Disciplines on Fees and Charges Imposed on or in Connection with Importation and Exportation
	A7.3 Separation of Release from Final Determination of Customs Duties, Taxes, Fees and Charges
	A9 Movement of Goods under customs control intended for import
	A10.5 Pre-shipment Inspection
	A10.6 Use of Customs Brokers
	A10.7 Common Border Procedures and Uniform Documentation Requirement
	A10.8 Rejected Goods
	A10.9 Temporary Admission of Goods/Inward and Outward Processing
	A11.4 Transit Strengthened Non-Discrimination
	A11.11-15 Transit Guarantees
	A11.16-17 Transit Cooperation and Coordination
	A11.5-10 Transit Procedures and Controls
	A2.1 Opportunity to Comment and information before Entry into force
	A2.2 Consultations
	A6.1 General Disciplines on Fees and Charges Imposed on or in Connection with Importation and Exportation
	A6.2 Penalty Disciplines
	A23.2 National Committee on Trade Facilitation
	A7.8 Expedited Shipments
Transport Infrastructure and Logistics	Facilitate transport of containers from port to Yangon industrial areas through river barges
	Upgrade night navigation in Yangon river to allow ship to call ports past midnight and review tariff structure to increase container turn-around
	Improve Yangon-Mandalay Expressway to allow containerized trucks
	Feasibility study with PPP options for investment in logistics park and island container depot
	Update air and marine regulations so that they are consistent with international standards
	Update inland water, rail and road transport regulations in order to improve quality of service

	Develop a fee-based vocational training program to strengthen the capacity of freight forwarders and customs brokers in logistics, documentation, cargo handling, insurance, and transport management issues, including multi-modal.
Pillar 3: Quality Infrastructure and Standards	
Quality Infrastructure (excluding SPS)	Assess demand for standards and quality infrastructure through value chain studies
	Capacity building program for government quality infrastructure and other methodologies
	Establish the Myanmar accreditation body
	Review its current progress with respect to standards, technical regulations and conformity assessment procedures, so as to take stock of specific areas in which efforts have yet to start
	Establish a simple compliance programme as a precursor to an AEO scheme;
	Establish a fully-functional risk management system
	Increase regional and international collaboration with NSBs to align Myanmar standards to regional and international ones (already in 5 year plan and budget plan).
	Set up an (MNAB-DRI) rapidly and formalize agreement to sign an MoU with Singapore as a partner accreditation body (on-going process)
SPS	Set up 'group purchases' to jointly import laboratories' inputs (test tubes, chemicals, etc.) and support the establishment of private chemical suppliers by using a network/group of laboratories
	Plan upgrading laboratories and laboratory policies
	Develop a national repository of all mandatory/voluntary standards
	Update its list of SPS Contact Points in Annex 10 of the ATIGA;
	Develop and implement an arrangement for the control and eradication of diseases and pests, in line with Article 6 of the WTO SPS Agreement;
	Develop SPS Management Capacity in relevant ministries and agencies
Conduct plant pest surveillance	
Pillar 4: Private Sector Development	
SME Development	Pass a new investment law, company registration and consider having negative list to limit discretion of line departments to restrict investment via ad-hoc decision
	Build trade associations capacity to market collectively, including associations with predominantly women members
	Reduce the need for "transactional" operating licenses in all but the few sensitive sectors
	Create incentives to encourage foreign firms to transfer skills to their Myanmar partners
	Eliminate structural barriers faced by women in setting up businesses
	Make it easier for overseas Myanmar men and women to start or invest in local businesses
	Develop and launch a comprehensive Regulatory reform program to improve the quality of Myanmar's business environment
Automation of key trade processes	
Access to Trade Finance	Review of legislations and practices for banks to provide trade finance instruments at market prices
	Remove restrictions to enable local and foreign banks to facilitate trade financing services
	Level the playing field between local and foreign firms by allowing local firms to use foreign banks

	Strengthen the Trade Information Network and trade associations to support local firms in meeting the SPS and TBT requirements of importing countries
Access to Trade Information	Clarify and publish business licensing requirements and steps/procedures so firms can comply at lower cost and in less time
	Invest in e-government to enable all agencies involved in administering trade to share information and offer their services to businesses through a national 'single window' & E-customs, with inputs and support from the private sector and development partners
	Organize training workshops for TSI representatives on data collection and data processing (relevance, quality and reliability of the information, methodology used, tools, etc.) (private sector to prepare proposed training module)
Pillar 5: Value Chain Development and Export Diversification	
Rice Sector	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 (to revise clearly).
	Open 15 training centres for mechanized farming across the major rice-producing regions of Sagaing, Ayeyarwady, Bago, Yangon, Rakhine and Mon
	Train small-scale millers in best practices, as a way of raising the country's overall rice quality (i.e. minimizing the effects of poor milling such as under milling, breakage, contamination, etc.
	Dedicate more of MoALI registered and certified seed production to high-quality varieties such as Paw San and Immayebaw as a critical source of quality seed supply to rice farmers.
	Train farmers on proper utilization techniques of certified seeds and on the importance of not mixing varieties and types of seeds.
	Encourage public-private partnerships by holding dialogues, meetings and forums; by presenting feasibility studies and lessons learnt; and by exploring areas of common interest, exchanging views, and sharing information and social networking.
	Monitor the production of quality products along the supply chain by taking samples, testing at labs, hearing feedback from markets, reporting back to farmers and solving problems by forming a special task force.
Beans, Pulses and Oilseeds Sector	Transform MPBSMA to an organization covering not only merchants but also growers and processors (apex body) by drafting a new mandate to represent the various stakeholders of the sector, reforming its organizational structure, and modifying its duties and activities.
	Organize more trade missions to selected target markets for business owners from the pulses, beans and oilseeds sector, with the help of UMFCCI and MoFA.
Corn Sector	Negotiate quotas of official export of corn to China, through road and sea transport
	Identifying of Policy Reforms for the enhancement of capacity building of farmers to better assess export market needs and requirements
	Promote expansion of Export Varieties
	Strategy Development for a Sector Steering Body Establishment
Fruits and Vegetables Sector	Identify strategic fruit and vegetable for export and develop export promotion strategy for selected item
	Developing a strong seed sector, stimulating foreign direct investment in seed sector by making the rules easier, clear, transparent and consistent and creating a National Seed Association NSA
	Improving access to commercial production knowledge: assure appropriate messaging and marketing of extension, update information on banned products, best practices in production and post-harvest handling, integrated pest management (IPM)
	Work with the emerging supermarket/high-value retail sector or vegetable processing industry to pilot contract farming or out-grower schemes with smallholders who will be provided training and support on improved cultivation and product quality.

Agro-Food Processing Sector	Improve market information flow from consumer to producer (quality, quantity, price) and promote development of demand-driven grading and sorting standards for vegetable crops that can be communicated from market to grower via such systems.
	Creating markets for high-quality vegetables, by improving market information systems (formal and informal) to convey information on quality and quantity demand in addition to price data.
	Selection of exportable goods based on market intelligence, establishment of publicly available information on strategic export products, support for participation in international product fairs
	Establishment of information on support programs for export, support on commercialization of export products;
	Develop better packaging practices: exemption of import tariff on packaging material; establishment of training institution for packaging and design establishment of packaging and design centre;
	Support for certification of processed products for export; marketing initiative for indigenous products
Fisheries Sector	Update and promulgate new laws in favor of more land to be used for aquaculture and ensure adequate enforcement by Union, Regional and State governments, relevant departments and delegated competent authorities.
	Establish demonstration schemes on modern production technology to ensure effective adaptation /modernization of current technologies through collaborating with international and regional fisheries institutions. Contract MoU (G to G) for genetic improved (especially for Tilapia).
	Implement a long-term training and certification programme for technicians, inspectors and trainers at DOF/Ministry of industry and processing factories to be qualified on GMP/HACCP, Food safety and processing training to SMEs.
	Construct public cold storage facilities in major cities to better manage exports and imports of perishable goods. (MFF is conducting cold storage activities and need to contact with MFF).
Forestry Sector	Set up a working group with private–public stakeholders to meet on a monthly basis to discuss developments and issues related to exporting and production (including taxes, investment, obstacles etc.). The working group should prepare policy notes and make proposals).
	Analyze the proposals made by the working group and produce an impact analysis linked to the introduction of new policies.
	Introduce a policy to announce next year’s estimated quota (for the tender) in a timely manner (i.e. before the end of the current year). Adopt a regular publishing of the allowable quotas for tendering by local industry in advance on a monthly basis (on-going process)
	Improve the sector’s access to financial services (loans, trade credit, insurance) by improving private operators’ knowledge of the existing financial products available to them, financial institutions’ knowledge of the forestry products sector’s needs and by working towards the development of adapted products for private operators.
	Have Myanmar Forest Products and Timber Merchants’ Association evaluate the practical measures it could adopt to raise awareness and punish offenders, including the possibility of implementing a blacklisting system against offenders.
Rubber Sector	Introduce a registry system for nurseries, which should be maintained regularly by MoALI (DICD).
	Provide training to stakeholders: producers, processors, traders and exporters.
	Establish a Rubber Board to oversee all activities in rubber products industries, upstream, downstream, marketing, etc. Prepare operational and management guidelines, and necessary legislation and regulations for the establishment of a Rubber Board.
	Conduct a feasibility study on establishing a Rubber Development Fund for the sector. Cess is a kind of tax. If the study is conclusive, establish the fund and operational guidelines, and have the Myanmar Rubber Board (to be established) set up a collection, management and steering committee.
	Carry out a feasibility study for setting up a Myanmar Rubber Trade Promotion Committee (MRTPC).
	Identify best practices overseas and organize/attend – with the support of DICD – workshops and seminars (cost sharing).

Garment Sector	Under the aegis of the high-level policy steering body, establish a working group to reduce the number and processing time of official procedures for garment factory start-up (e.g. registration, so that start-up time is reduced from four or five months to one month).
	Form a high-level policy steering body (e.g. Inter- ministerial committee or ministry) Directorate of Investment and Company Administration to the coordinated formulation and implementation of strategic policies and initiatives for the promotion of the textile and garment sector.
	Adopt a Specialized Textile and Garment Zone (STGZ) law and articulate implementing regulations that provide for the ownership, development and management of fully serviced STGZ by public, private, or public–private parties. This should promote synergetic clusters and optimize the cost of providing the sector with the infrastructure it needs to succeed.
	Articulate regulations for the trained worker retention clause of the Employment and Skill Development Law and enforce them, so that employers and workers may engage in meaningful contracts by which employees receive advanced training from firms in exchange for commitments to stay with those firms for an agreed period, thereby incentivizing employer investment in Myanmar labor.
	Encourage greater use of modern machinery by having the Government guarantee long-term credit arrangements between Myanmar buyers and foreign suppliers.
	Commission a feasibility study to review potential STGZ sites and make recommendations on location, size, infrastructure, rates, ownership and management structures, services, impacts, risks, etc.
	Elaborate Legal and regulatory frameworks for STGZ in line with international best practices, as a prerequisite for attracting private investment in the construction, management and ownership of STGZ.
	Recognizing the importance of the garment sector as Myanmar’s only major manufacturing industry, set aside 4,000 acres of public land for the establishment of two to three garment-centric STGZ.
Gems and Jewels Sector	Establish Gem & Jewelry Promotion Act: Enact Gems and Jewelry Promotion act as a legal basis to support promotion of gem and jewelry industry
	Strengthen public-private cooperation for export promotion to improve the efficiency of government policy regarding the gem and jewelry industry
	Strengthen export incentives to create a value-added based gem and jewelry industry, building value chains from gemstone cutting, through jewelry setting, to export is important.
	Support export marketing for overseas gem and jewelry marketing by SMEs, including participation in international exhibitions, should be strategically promoted by Gem and Jewelry Government Regulatory Body
	Build on-line market platform that specifically selling Jade products on the Chinese market and build a system of on-line settlement and shipping to support international transactions including insurance and legal documentation requirements
	Enhance creative and technical capacity of designers in the value chain process to be competitive in the jewelry market, to be well aware of global market trends
Tourism Sector	Build the capacity of Myanmar immigration services in data collection about travelers’ arrivals and profiles for commercial purposes, to be used by the tourism authorities and the tourism industry for statistical, market research and promotional purposes.
	Strengthen coordination of relevant agencies in managing tourist destination (Destination Management).
	Design detailed target market marketing strategies based on existing tourism product offers and specific intervention angles, such as enhancing promotion, improving quality of service and developing new packages, as described in this strategy for existing markets (Thailand, Japan, China, United States / Canada, Republic of Korea, Singapore, Taiwan, France, Germany, United Kingdom, India, Australia and New Zealand).

	Assist with the development of a branding strategy for the tourism sector based around the vision statement 'Charming Myanmar'.
	Strengthen vocational training programmes in technical schools and training centres, in partnership with the private sector, to provide internships and to facilitate access to the tourism job market and improve the skills of young graduates (ongoing process).
	Expand the utilization of e-visa system.
	Organize an awareness-raising campaign at the national and state levels to sensitize authorities (government, police) and tourism professionals on the economic importance of tourism, and the benefits in terms of positive image-building, through training workshops, press advertisements and media spots (ongoing process of MoHT).
	Establish a weekly magazine to advertise cultural events, entertainment, dining and outings, with both electronic (web-based) and paper formats in English language for tourists and locals (along the lines of 'Time Out') in major destinations (Yangon, Mandalay, Bagan) –(on-going process to establish National Tourism website)

Tier 2 Priorities	
Reform Areas	Proposed Action
<i>Pillar 1: Trade Policy and Institutions</i>	
Institutional Reforms	Develop legal capacity and legal functions within Union Government ministries by placing lawyers across key ministries
	General training on trade obligations and on the relation between domestic legislation/regulation and trade
	Develop a government ICT system and database to improve sharing of information on trade and investment and coordination
Regulatory Framework and Transparency	Develop and adopt a Myanmar Trade Law
	Set up Trade Portal with codes corresponding to UNCTAD's MAST classification and amend legislation to require trade-related departments report NTMs + procedural information
	Ensure transparent rules, systematic and predictable enforcement, and minimize regulatory discretion in trade and investment
Trade in Goods	Ensure full implementation of ATIGA in Myanmar
	Increase information and knowledge of Customs and MoC officials on rules of origins, certificate of origins, GSP and other preferential market access
	Develop a searchable database on the trade repository for duties/commercial taxes by HS code
Trade in Services	Support Myanmar participation in ATISA, RCEP and other FTA negotiations (Training on negotiation techniques with respect to international trade agreements for all relevant departments (not limited to MoC)
	Increase convergence among commitments made under different flora
	Improve public-private dialogue on services trade, in particular as regards regulatory frameworks
<i>Pillar 2: Trade Facilitation, Transport and Logistics</i>	
Trade Facilitation	Develop the risk management and technical capacity of customs and related agency staff to ensure consistency and predictability in enforcement of customs and trade regulations
	Connect the customs and tax databases to reduce the administrative costs of businesses
Trade Facilitation Agreement (WTO TFA)	A1.1 Publication
	A1.2 Information available Through Internet
	A1.3 Enquiry Points
	A3.1 Advance Rulings
	A7.1 Pre-arrival processing
	A7.6 Establishment and Publication of Average Release Times
	A7.9 Perishable goods
	A8 Border Agency Cooperation
	A10.1 Formalities and Documentation Requirements
	A10.2 Acceptance of Copies
	A10.3 Use of International Standards

	A12 Customs cooperation
	A11.1-3 Transit Charges, Regulations, and Formalities
	A5.1 Notifications for enhanced controls or inspections
	A5.3 Test Procedures
	A7.2 Electronic Payment
	A7.4 Risk Management
	A7.5 Post-Clearance Audit
	A7.7 Trade Facilitation Measures for Authorized Operators
	A10.4 Single Window
	A1.4 Notification
Transport Infrastructure and Logistics	Expand the use and stimulate the development of bonded warehouses through the identification of suitable locations at and near ports, airports, industrial zones, and special economic areas (especially Mandalay, Mu Se, and Myawady). Develop a pilot project for the construction of a sea-floating bonded warehouse. Ensure that all bonded warehouses are equipped with modern ICT, EDI and inventory management capabilities.
	Increase amount of public land used for container yards, allowing more companies to operate, increasing competition and reducing costs.
	Inland waterways and Railway Transportation
	Review practices in in-land border trade, and invest in infrastructures at border check points
	Adapt enabling regulation to facilitate private investment and improve capacity to supervise
	Capacity building TA and review constraints for development of quality logistics services
	Establish a Multimodal Transport Master Plan to plan and coordinate transport infrastructure development in the country in the long run (5–10 years). Identify priority commercial transport links, conduct feasibility studies and establish related investment requirement and plans (public, private investment, public–private partnerships, Build-Operate-Transfer).
Pillar 3: Quality Infrastructure and Standards	
Quality Infrastructure (excluding SPS)	Develop a National Quality Institute
	Establish a National Metrology Institute;
	Upgrade existing laboratories and establish new laboratories to test physical analysis, phytosanitary and fumigation, chemical residues, food quality testing (carbon testing, benzopyrene), etc., by advocating for budget allocation and expanding technical cooperation with regional and international organizations.
	Implement a pilot project to link selected labs together to conduct collective training sessions, proficiency tests and joint tests. Capitalize on existing experience (e.g. DRI Proficiency Testing for water samples and rice flour among DRI, FDA, NAL, NHL, OH, DOAI, CTQM, DMR, FIQCD, MITS and URC. Based on pilot success, establish a memorandum of understanding between the various labs to formalize working arrangements and confirm long-term collaboration.
	Establish a central database, managed and maintained jointly between QM institutions, for the collection, storage and dissemination of technical market requirements.
	Enable a specific committee, such as the TBT or SPS national committees or the NTM national committee, to act as a formal public and private dialogue forum to ensure coordination and cooperation in the QM function.

	Ensure regular testing of accredited trainers, auditors and inspectors to ensure adequacy of trainings and inspections in line with international best practice.
SPS	Conduct food safety surveillance
	Develop SPS laboratories
	Set up mobile labs for quality and analysis of pesticides, aflatoxins, fertilizers and inspection for plant and plant products etc. testing to be sent to rural regions to conduct tests at production level.
	Control quality of veterinary drugs
	Upgrade university SPS curricula plant and animal products
Pillar 4: Private Sector Development	
SME Development	Build on NES plan to elaborate a broad-based industrial policy in light manufacturing, starting with garment, agribusiness and tourism
	Improve corporate governance and disclosure rules and enforce them
	Improve enforcement of tax laws to encourage business formalization and decrease the size of the informal economy
	Develop regulatory capacity at the state/region level to promote trade and investment
Access to Trade Finance	Promulgate the legal frameworks to establish a credit bureau for a better business environment.
	Create searchable title databases and online registries for mortgage and liens so that lender can confirm collateral.
	Pass a law establishing a national Export-Import Bank dedicated to strengthening Myanmar' Participation in international Trade
	Restructure the one of MICB and MFTB under MOPF as a EXIM Bank.
	Prepare the EXIM Bank Law in cooperation with MOC and CBM.
Access to Trade Information	Establish Trade Information Centers for private stakeholders at the district level. The Centers 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 (ongoing process).
	Develop a national programme for data computerization, including the definition of standards for better TI data dissemination.
	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 (to prepare project proposal and arrange the Trade Channel in TV).
Pillar 5: Value Chain Development and Export Diversification	
Rice Sector	Provide small farmers with model agreements, procurement assistance and technical training that will allow them to confidently purchase communal dryers and warehouses at the village level, thereby providing critical loss-prevention facilities to small farmers who could not afford them individually.
	Use public-private partnerships to provide land and financing for the construction of warehouses at the township level, so that small farmers without their own storage can take advantage of warehouse space (free or for rent) to reduce postharvest losses and free up farm space to make way for new crops.
Beans, Pulses and Oilseeds Sector	Promote R&D for new varieties of higher yield and better quality by strengthening and modernizing R&D centers, capacity-building and monitoring of market demand.
	Upgrade existing laboratories and establish new laboratories to test physical analysis, phytosanitary and fumigation, chemical residues, food quality testing (carbon testing, benzopyrene), etc., by advocating for budget allocation and expanding technical cooperation with regional and international

	<p>organizations.</p> <p>Build the technical capacities of seed technicians at DAR, DoA-Seed Division, universities and private multiplication businesses through the training of trainers and the development of manuals. Seek international trainers.</p>
Corn Sector	Capacity Development at Processing Level to diversify products exported
	Strengthening Market Linkages with other Asian markets (Singapore, India, Malaysia, Indonesia)
	In line with MCFA long term plan Road Map, invest in dedicated facilities for export (Storage, Warehousing, Conservation)
	In line with MoALI's Plan of action, Invest in supply chain infrastructure along all spatial segments of the food supply chain
Fruits and Vegetables Sector	Strengthen in the capacity of an association that can represent the wholesale sector and start dialogues and cooperation with other traders, government, etc.
	Improve supply chain logistics and technology – harvesting tools, hygienic containers, cleaning, sorting, waxing, packing, cooling equipment/technology, storage facilities (basic and refrigerated).
	Implement and build consumer confidence in a local level of GAP – export-ready (Global) GAP as a next step, for both pre-harvest and post-harvest best practices and develop awareness and adoption programs for both growers and private companies.
	Strengthen institutional capacity of Fruit and Vegetable Associations, clusters, producer groups to form a Federation to represent Myanmar Fruit and Vegetable Sector
	Improve existing infrastructure and building new ones to facilitate connectivity
Agro-Food Processing Sector	Enhance the potential crop items and diversification of cultivation of crops item
	Provide tax incentives for domestic companies and FDI; control of border trade to secure domestic demand
	Export-import link system and establishment of incubation centers for SMEs promotion establishment of quality control laboratories
	Develop the production of organic products including understanding of the individual markets on which organic products to grow and participation in trade fairs and exhibitions and knowledge transfer to farms and players in the industry
	Promote Myanmar Agro-based products as a quality brand and enhance competitiveness in international trade
Fisheries Sector	Upgrade/establish disease diagnosis/fish health/fish feed laboratories with up-to-date equipment to facilitate essential tests for fish health and international trade (e.g. chemical residues test for EU markets, water quality, and safety of ready-to-eat and finished products, environmental contamination and pollution, hormone content).
	Have Union, Regional and State governments prioritize aquaculture zones encompassing hatcheries, farms, ice plants, cold storage and feed mills to ensure effective development within their strategy to boost intensive production for processing plants and local markets.
	Establish a credit guarantee scheme with adequate resources, to be implemented in commercial or trade banks with the objective of reducing the collateral requirements needed to access loans for the fisheries sector.
	Implement a long-term training and certification programme for technicians, inspectors and trainers at DOF/Ministry of industry and processing factories to be qualified on GMP/HACCP, Food safety and processing training to SMEs.
	Construct public cold storage facilities in major cities to better manage exports and imports of perishable goods. (MFF is conducting cold storage activities and need to contact with MFF).
Forestry Sector	Introduce a system whereby open tendering becomes the only way of purchasing raw timber materials
	Improve the system in place for issuing exports licenses for timber products by simplifying and streamlining the administrative procedures and improving

	<p>their transparency.</p> <p>After adopting the log export ban, prohibition of the export of roughly sawn timber or adoption of specific taxation system (raising the amount of tax) for those timber is necessary to be practiced.</p>
Rubber Sector	<p>Issue quality analysis certificates and obtain international accreditation of labs.</p> <p>Provide scholarships for postgraduate diploma or degree courses to universities/institutes, either overseas or local, through the Rubber Development Fund (to be established) and DICD.</p> <p>Undertake research in different areas of the rubber products supply chain. With the support of the Rubber Development Fund (to be established), seek sources of financing (public/private or foundations/ associations) and associations with international academic and research institutions.</p>
Garment Sector	<p>According to current skill demands, implement a vocational programme for machine operation and maintenance, production management, industrial engineering, fashion design and computer assisted design operations.</p> <p>Using public funding or public-private partnership, establish worker training, Testing and certification centre for the booming Government labor force at a sector clusters and STGZ as a course effective ways of upgrading productive capacity and growing the labor pool where it is needed.</p>
Gems and Jewels Sector	<p>Establish the Gem & Jewelry Export Promotion Council and Jewelry Industrial Development Committee to effectively cope with various difficulties faces by exporters in the long-run, a high-level public-private coordination mechanism.</p> <p>Support National Brand Development</p> <p>Establish design centers to provide a favorable environment that encourages future designers and support creative design commercialization and protecting intellectual rights of designers.</p> <p>Establish education and training institutes to get skilled labor through a network of vocational schools, specialized training institutes, colleges to supply skilled workers and organized curriculum</p> <p>Host local campuses of global institutions to earn international recognition to train specialists in gem and jewelry to upgrade Myanmar's reputation in the global market</p>
Tourism Sector	<p>Align and harmonize rules and regulations on tourism and related standards between Union and State governments to allow development of new tourism products (ecotourism, adventure, home stay, etc).</p> <p>Assist with the running of tours, including developing marketing instruments; training tour operators, local staff and service providers; signage; and evaluations and client satisfaction surveys.</p> <p>Identify an entity (Tourism Marketing Board) to produce and manage tourism information and train staff on how to analyze existing information about global and source market demand and trends, how to generate new information (e.g. through surveys), and how to disseminate the results to stakeholders in the tourism sector</p> <p>Develop and promote a product offer for the ecotourism, adventure and experiential tourism, cruise and yachting tourism, leisure and wellness product segments</p> <p>Assist with the development of a branding strategy for the tourism sector based around the vision statement 'Charming Myanmar', in synergy and complementarily with the Tourism Master Plan, which would be rolled out across existing and new tourism product segments as well as existing and new target markets. Branding strategy for the tourism sector would include (1) Developing a common tourism industry logo; (2) Developing messages, marketing material and communication channels; and (3) Training of tourism professionals about implementation of the branding strategy and benefits for the Myanmar tourism sector</p>

IMPLEMENTATION MECHANISMS

Background

The Government of the Republic of the Union of Myanmar and its development partners agree to take concrete actions to make their cooperation more effective. The Nay Pyi Taw Accord for Effective Development Cooperation is a set of localized commitments that take as its foundation Myanmar's unique history, values, governance systems, and socio-economic circumstances to create a country-specific set of clear, measurable and monitorable actions.

Updated Aid Coordination Mechanisms

In 2017, the Government has formed a new committee Development Assistance Coordination Unit (DACU) chaired by the State Counselor, Daw Aung San Suu Kyi that will lead and set for effective implementation for development policy and strategies. The Government is committed to working with all Partners in Development to ensure that international development assistance brings maximum benefits to the people of Myanmar, and that the establishment of the Development Assistance Coordination Unit is in line with this commitment. DACU will strive to improve the coordination and effectiveness of future development assistance to Myanmar.

Development Assistance Coordination Unit (DACU)

The DACU's primary responsibilities will be: to identify priority sectors and potential projects for future development assistance, based on consultations across government; to draw up, in dialogue with Partners in Development, a nation policy for development assistance; to review, and if necessary revise, the existing aid coordination architecture, including Sector Working Groups, so as to ensure efficiency and inclusively; to support the Economic Committee by reviewing and evaluating potential loans and major grant and technical assistance projects; and to identify constraints to the effective delivery of delivery assistance, and help to resolve those constraints where possible.

Trade Sector Working Groups (TSWG)

Regular government and donor consultation (TSWG) meeting is organized on biannual basis to cooperate with Development Partners and to provide indications of commitments and disbursements for subsequence years. Sector Working Groups (GoM, DPs, CSOs, private sector and others) meets regularly and aims to improve development assistance effectiveness and coordination by providing a forum for developments partners. MoC organizes informal MoC-DP meetings to continue liaising with public, private and development partners to define projects contributing to Strategies implementation and to manage public-private coordination for the implementation of existing strategies and plans. Sector Implementation Committee/ Sector Working Groups are implementing these activities.

Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)

Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP) was formed on 25 April 2016 to effectively enhance State Reform Program in line with international practice and procedures, chaired by Union Minister for Ministry of Commerce and composed of government and

private sector members. Decisions of taskforce will be reported to the Economic Affairs Committee Meeting (Cabinet Meeting). Various working committees are under this Taskforce. Taskforce meetings will be held in cooperation with the government and private sector to take care all trade related program/ activities including responsibilities of former Myanmar Trade Development Committee (MTDC) and National Steering Committee of EIF.

Myanmar National Trade Facilitation Committee (MNTFC)

Myanmar National Trade Facilitation Committee was established on 5th December 2016, chaired by Director General of Department of Trade and co-chaired by Director General of Customs Department to manage the implementation of the Trade Facilitation Agreement (TFA) and to facilitate domestic coordination on trade facilitation issues. Myanmar National Trade Facilitation Committee will report to Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP).

Aid for Trade Coordination Unit

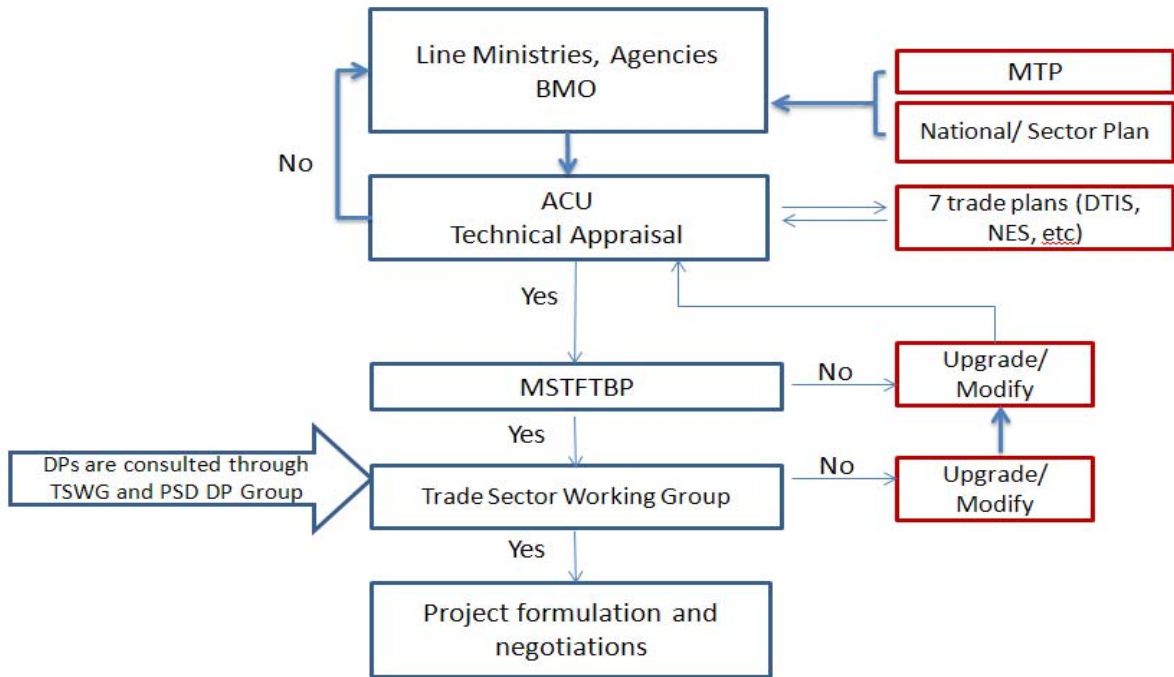
With the mandate to assist the Focal Point (FP) of EIF Program in Myanmar, the Aid for Trade Coordination Unit (EIF-NIU) was established to support the implementation of the EIF programme and all other aid for trade programme. Functions of Aid for Trade Coordination Unit for implementation of EIF programme and other implementations of Aid for Trade and roles and responsibilities of have been designed. The ACU reports to the Director General, Department of Trade, Ministry of Commerce.

Monitoring, evaluation, updating and reporting on the MTP

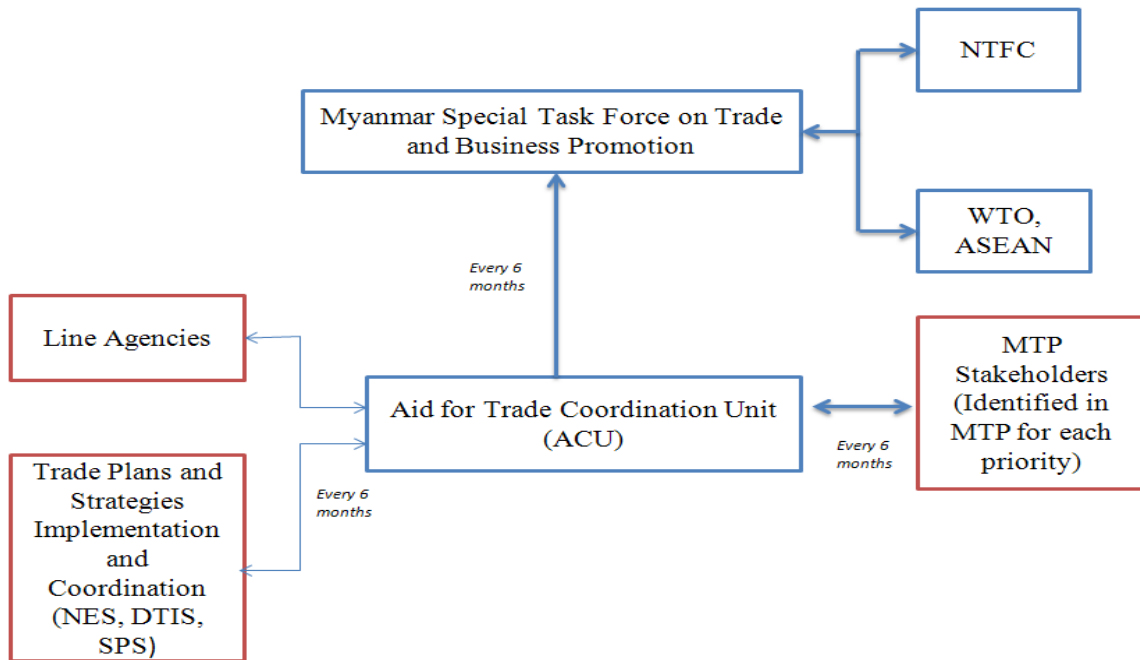
The MTP does not replace or supersede the actions plans and action matrix found in the seven national trade documents used as a basis for the formulation of the MTP. Each of these documents has their own implementation, monitoring, evaluation and reporting mechanisms that must be adhered to. The entity in charge of monitoring the MTP implementation will need to liaise on a regular basis with ministries, agencies and committees responsible for implementation of individual action plans. For instance, in the case of the NES implementation, the ACU would need to liaise with the NES Secretariat as well as the relevant SIC and SWGs to ensure coherence among reporting mechanisms.

The Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP), with technical and secretariat support provided by the ACU, is tasked with monitoring the implementation of the MTP. It is expected that the ACU will carry out annual stock-taking exercises in partnership with relevant stakeholders and beneficiaries. On the basis of the annual stock-taking exercise, the MTP result framework and MTP resource mobilization strategy will be updated.

MTP Project Formulation and Appraisal Process



MTP Monitoring & Evaluation Process



RESOURCE MAPPING CLUSTERS

This document provides an initial snapshot of what resources are currently available for the implementation of the MTP, and where new resources must be mobilized. In some cases, activities outlined in the MTP clusters overlap with the activities of current donor- or government-funded projects. In other cases, new sources of funding will be required to carry out the necessary activities, as well as for additional monitoring and evaluation activities.

Methodology

This framework was compiled following in-country consultations with relevant MDAs, and an extensive desk review of both current and planned ODA from both bilateral and multilateral donors. In keeping with the terms of reference for the development of the MTP, the DTIS activities have been grouped into sub-programs, based on thematic alignment with individual pillars of the *Agenda for Prosperity* and sector focus. The existing prioritization and sequencing of the DTIS priorities has remained intact within these new sub-programs.

For each sub-program, the component activities have been identified and the funding needs briefly summarized. The following required resources have been highlighted for each activity:

- ✓ Resources/activities required by the ACU;
- ✓ Advocacy to cabinet on potentially cross-cutting or politically sensitive issues;
- ✓ Advocacy to the NSC/implementation mechanism on issues that will require technical expertise from relevant agencies/donors/etc.;
- ✓ Financial resources required by Government (beyond allocated budget);
- ✓ Financial resources required by development partners. Where activities under current/future ODA programs overlap with the priority actions, the source/amount of this ODA has been highlighted.

It is expected that this document will be amended and updated over the lifespan of the MTP, following ongoing collaboration with agencies and possible identification of other existing/future ODA programs.

Cluster	I.1			
MTP Pillar	Pillar I: Trade Policy and Institutions			
Reform Area	Cluster I.1: Institutional Reforms			
Cluster Objective	Design and implement a thorough reshaping of MoC and trade-related institutions organizational capabilities to respond effectively to the needs of reforms			
Contribution to Economic Policy Targets #	#3, #6, #11			
Challenges to be addressed		Proposed approach		
The lifting of sanctions and Myanmar re-entry in the global trade arena has created huge institutional gaps for trade-related institutions. The MoC and trade-related agencies mandates, structures, procedures, staffing are not in line with best regional and international practices, with limited capacity in analyzing impact of trade policy changes on growth, prices, trade in services, trade agreements, and trade negotiations.		A thorough review of trade-related agency and ministry capacity needs and gaps must be carried out with a view to propose a programme of prioritized and sequential institutional reforms, ranging from better job descriptions, better intra and inter-ministerial coordination, regulatory roles, increased used of ICT and automation, leading to more efficiency of public administration and trade costs reduction		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
1. Carry out a thorough Capacity Needs Assessment (CNA) leading to the adoption of a reform and capacity development plan for the trade-relevant departments and agencies. This includes a review of incentives, legislative mandate, organizational structure of trade-relevant departments	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
2. Develop a massive urgent training programme for managers, officials and staff in trade-relevant departments, on the basis of renewed job-description and capacity gaps. The training programme will be used as an integral part of career development plans in public service	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
3. Review and strengthen the trade related national institutional arrangements (NIA) under the newly-created Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP), by revamping the role of the TSWG and trade-related working groups (MTDC, NTFC, etc.) under it and streamlining	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	No

functioning and reporting mechanisms				
4. Build capacity of Myanmar trade attachés and counsellors	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	No
<u>Long Term Actions:</u>				
5. Develop a government ICT system and database to improve sharing of information on trade and investment and coordination	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	Yes
6. Assess potential of moving key paper-based trade processes (business registration, certificate of origins, IPR registration, etc) to an ICT-based through a step-by-step automation process	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
7. Capacity building for government departments and think tank organizations on data and policy analysis, safeguard measures	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
8. Develop legal capacity and legal functions within Union Government ministries by placing lawyers across key ministries and providing training programme on trade obligations and on the relation between regional legislation/regulation, domestic legislation/regulation and trade	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	No
Current ODA programs (source: mohinga.info)				
<i>Project name:</i>	<i>Funded by:</i>			
Trade Development Programme (TDP)	EU/GIZ			
EIF Tier 1	EIF Trust Fund			

Cluster #	I.2			
MTP Pillar	Pillar I: Trade Policy and Institutions			
Reform Area	Cluster I.2: Regulatory Framework and Transparency			
Cluster Objective	Enhance the country's regulatory framework by increasing transparency, access to information and addressing legal and regulatory bottlenecks			
Contribution to Economic Policy Targets	#1, #2, #3, #4, #7, #10, #11, #12			
Challenges to be addressed		Proposed approach		
Regulatory transparency is key during a transition period with rapid changes in the legal and regulatory environment and the entry of new businesses. In addition, diversifying the economy requires reducing distortions in the allocation of resources, particularly from the use of non-tariff measures (NTMs) that needs to be classified, inventoried and, possible removed. A lack of easily access to information and cumbersome inter-ministerial coordination are key barriers to be tackled.		A systematic inventory of all trade-relevant regulations and NTMs will be carried out, in line with AMS commitments, as a basis to the creation of creating a trade portal, and populating the portal with the inventory of regulations in both Burmese and English. A NTM Committee (NTMC) with a mandate to review existing and new regulations and recommend simplifying and automating the process whenever necessary will be created under the aegis of the Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
9. Training on (1) the identification, collection, classification and notification of NTMs and (2) impact of Rules of Origins on Myanmar's trade	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	Yes
10. Formulate a comprehensive Myanmar Trade Law	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
11. Clarify regulatory processes and rules to enable businesses to comply, reduce regulatory discretion, and promote fair competition	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
12. Equip Myanmar with an adequate toolbox of WTO-consistent trade	<u>Advocacy to Cabinet:</u>	<u>Advocacy to</u>	<u>Gov't funding:</u>	<u>Donor support</u>

policy instruments (trade defences i.e. safeguard, countervailing, etc.).		<u>MSTFBTP:</u>		
	No	Yes	Yes	Yes
<u>Long Term Actions:</u>				
13. Assign NTM committee (NTMC, possible merged with the National Trade Facilitation Committee) to review selected NTMs have clear objectives around protecting safety, social norm, environment, and public health and procedures	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	No	No
14. Accelerate the reform of the licensing system by reviewing the remaining non-automatic licenses, exercise more liberalizations, give Yangon office more autonomy and decision making power for license issuing and establish an online database of license requirements, searchable by HS-code.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
15. Remove unnecessary procedures and practices through consultations with stakeholders (e.g. advance income tax for export, restrictions for foreign companies to import)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	No	No
16. Set up Trade Portal and amend legislation to require trade-related departments report NTMs + procedural information	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
	Yes	Yes	Yes	Yes
17. Ensure transparent rules, systematic and predictable enforcement, and minimize regulatory discretion in trade and investment	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	No	No
Current ODA programs (source: mohinga.info)				
<i>Project name:</i>		<i>Funded by:</i>		
Trade Development Programme (TDP)		EU/GIZ		

Cluster #	I.3			
MTP Pillar	Pillar I: Trade Policy and Institutions			
Reform Area	Cluster I.3: Trade in Goods			
Cluster Objective	Accelerate the implementation of commitments made under ASEAN and WTO on trade in goods to benefit from accrued market access, simplified tariff structure and increased transparency			
Contribution to Economic Policy Targets	#1, #2, #3, #6, #7, #12			
Challenges to be addressed		Proposed approach		
Myanmar regional and global trade integration is hampered by structural bottlenecks for trade in goods, ranging from an over complex MFN tariff structure, outdated HS system, inadequate application of NTM (eg rules of origins) and negotiation capacity gaps, in view of the ASEAN+ FTA negotiations.		By structuring its trade reform program around ATIGA commitments, Myanmar will also achieve full compliance with its WTO obligations. Targeted measures on tariff structure, ROO, HS system and training of negotiators in line with the recommendations of the recently completed ATIGA Gaps assessment will help addressing key constraints and lessening their impact for traders		
Actions to be undertaken		Resource Requirements		
<u>Short to Medium Term Actions:</u>				
18. Capacity-building on recording and classifying trade data on HS-system and consolidation of data for normal and border trade and in SEZs	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
19. Training on negotiation techniques with respect to international trade agreements, coaching negotiators to further engage in FTA negotiations (e.g. RCEPT) and build capacity in trade negotiation	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
20. Training on ASEAN Rules of Origin (RoO) and review process	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
21. Publish clear guidelines on trade and customs procedures/regulations on the ASEAN National Trade Repository	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	No

22. Streamline and simplify Myanmar's tariff structure to reduce trade "nuisance"	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	No
23. Reconcile the ASEAN Harmonized Tariff Nomenclature (AHTN) 2007 and AHTN 2012, as well as with respect to the implementation of Myanmar's licensing system;	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	No
24. Develop a searchable database on the trade repository for duties/commercial taxes by HS code	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
<u>Long Term Actions:</u>				
25. Accelerate implementation of Myanmar's ATR/NTP/NTR obligations under the ATIGA in line with the recently conducted ATIGA Gaps Assessment	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	No
26. Improve certificates of origin issuance procedure, in particular for form-D for Myanmar's exporters to utilize preferential tariffs in ASEAN, including the possibility and associated steps to fully automatize the process	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	No
Current ODA programs (source: mohinga.info)				
<i>Project name:</i>	<i>Funded by:</i>			
Trade Development Programme (TDP)	EU/GIZ			

Cluster #	I.4			
MTP Pillar	Pillar I: Trade Policy and Institutions			
Reform Area	Cluster I.4: Trade in Services			
Cluster Objective	Accelerate the contribution of trade in services to the economy in line with sub-sector potential			
Contribution to Economic Policy Targets	#2, #3, #5, #7, #8, #11, #12			
Challenges to be addressed		Proposed approach		
In spite of a relatively open regime for trade in services, administrative and regulatory barriers, both horizontally and sector-specific introduce uncertainties and additional costs in the operation of services firms, limiting the economy-wide benefits of the market opening of the sector and hampering the capacity of the Government to attract further investment in the services sector		Measures need to be applied in parallel to streamline and improve the institutional framework, gathering all Government trade in services responsibility into one roof, bridging the gaps between rule and administrative practices following the implementation on the new Foreign Investment Law and applying sector-specific measures.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
27. Deliver training on negotiation techniques with respect to international trade agreements. Coach and monitor Myanmar's participation in FTA negotiations and build capacity in trade in services negotiation	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
28. Support Myanmar participation in ATISA, RCEP and other FTA negotiations and increase convergence among commitments made under different fora	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
29. Improve public-private dialogue on services trade, in particular as regards regulatory frameworks	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	No	No
Long Term Actions:				
30. Redesign institutional framework for coordination and oversight in service trade to one "non-service" ministry and align mandates of other sectorial	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>

departments. This could possibly lead to the creation of a Trade in Services department under the DoT and the shifting of responsibility under ASEAN AFAS to MoC.	Yes	Yes	Yes	Yes
31. Carry-out service regulatory reviews and reform regulations, using RASTI and other tools available, to be used in the preparation to AFAS 10, ATISA and RCEP negotiations	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
32. Establish services portal	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
Current ODA programs (source: mohinga.info)				
<i>Project name:</i>	<i>Funded by:</i>			
Trade Development Programme (TDP)	EU/GIZ			
Initiative for ASEAN Integration (IAI)	GIZ			

Cluster #	II.1			
MTP Pillar	Pillar II: Trade Facilitation, Transport and Logistics			
Reform Area	Cluster II.1: Trade Facilitation			
Cluster Objective	Improve and simplify border procedures with a view to align trade facilitation in Myanmar with international best practices			
Contribution to Economic Policy Targets	#1, #4, #6, #7, #10, #12			
Challenges to be addressed		Proposed approach		
Myanmar's border procedures are onerous and unnecessarily bureaucratic. The length and complexity of the procedures penalize the country in international ratings by slowing down and discouraging formal transactions while encouraging parallel trade. It will be important that all the trade facilitation issues can be addressed together, including congestion reduction, streamlined customs and border crossing procedures and increased reliance on IT.		Improving trade facilitation practices and procedures can be considered a priority agenda for Myanmar, as it affects overall logistics efficiency and competitiveness for producing goods in Myanmar. Customs reform must proceed with a broad agenda to align cargo clearance procedures with international best practice. While the ongoing customs modernization is important, it will not be exhaustive in covering the wide-ranging needs and problems in logistics and trade facilitation in Myanmar. Logistics and trade facilitation are key to the efficiency and reliability of the supply chain. Therefore, a comprehensive reform agenda—going beyond customs automation—will be considered.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
33. Establish a National Trade Facilitation Committee, including private sector participants, to oversee implementation of the WTO Trade Facilitation Agreement, Cross Border Trade Facilitation Agreement, and cargo clearance procedures	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	No	No
34. Provide training to staff at government institutions involved in customs and trade facilitation on the use of basic office software, in order to raise the ICT skills.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	No
35. Establish a simple compliance programme as a precursor to an AEO scheme	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	No	Yes

<u>Long Term Actions:</u>				
36. Improve processes for customs clearance and inspections by accelerating implementation of WTO Customs Valuation Agreement, increasing use of ICT in Customs Procedures	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
37. Reviewing existing Customs and other trade-related department legislation and assisting in writing a new National Customs Code.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
38. Strengthen border and inland enforcement to decrease the 'grey market' trade (goods imported without paying proper duties)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	No
39. Develop risk management and technical capacity of customs and related agency staff to ensure consistency and predictability in enforcement of customs and trade regulations	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
40. Connect the customs and tax databases to reduce the administrative costs of businesses	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	Yes
Current ODA programs (mohinga.info)				
<i>Project name:</i>	<i>Funded by:</i>			
Myanmar Trade Development Programme	European Union			
National Single Window and Customs Modernization by Introducing Automated Cargo Clearance System	JICA			

Cluster #	II.2			
MTP Pillar	Pillar II: Trade Facilitation, Transport and Logistics			
Reform Area	Cluster II.2: Trade Facilitation Agreement (WTO TFA)			
Cluster Objective	Implement WTO TFA fully using on-going reforms and the Myanmar's schedule of commitments ("categorization of articles")			
Contribution to Economic Policy Targets	#1, #3, #4, #6, #7, #10, #12			
Challenges to be addressed		Proposed approach		
Myanmar's trade has surged dramatically in recent years, but practices in trade facilitation have not significantly changed. Therefore, reviewing and simplifying procedures in trade facilitation are crucial if Myanmar is to be able to meet growing trade volumes and increased demand for timeliness in exports and imports. The WTO TFA that Myanmar ratified in 2015 provides a unique set of recommendations (articles) that Myanmar should fully embraced		The TFA contains provisions for expediting the movement, release and clearance of goods, including goods in transit. It also sets out measures for effective cooperation between customs and other appropriate authorities on trade facilitation and customs compliance issues. The proposed approach is to provide direct support and coaching for Myanmar authorities to implement TFA Section I, which contains provisions for expediting the movement, release and clearance of goods, including goods in transit, clarification and improvements of relevant GATT articles as well as sets out also sets out provisions for customs cooperation		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
41.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

<p>A4.1 Right to Appeal or Review A5.2 Detention A6.2 Specific Disciplines on Fees and Charges Imposed on or in Connection with Importation and Exportation A7.3 Separation of Release from Final Determination of Customs Duties, Taxes, Fees and Charges A9 Movement of Goods under customs control intended for import A10.5 Pre-shipment Inspection A10.6 Use of Customs Brokers A10.7 Common Border Procedures and Uniform Documentation Requirement A10.8 Rejected Goods A10.9 Temporary Admission of Goods/Inward and Outward Processing A11.4 Transit Strengthened Non-Discrimination A11.11-15 Transit Guarantees A11.16-17 Transit Cooperation and Coordination A11.5-10 Transit Procedures and Controls A2.1 Opportunity to Comment and information before Entry into force A2.2 Consultations A6.1 General Disciplines on Fees and Charges Imposed on or in Connection with Importation and Exportation A6.2 Penalty Disciplines A23.2 National Committee on Trade Facilitation A7.8 Expedited Shipments</p>		Yes	Yes	Yes
<p><u>Long Term Actions:</u></p>	<p><u>Advocacy to Cabinet:</u></p>	<p><u>Advocacy to MSTFBTP:</u></p>	<p><u>Gov't funding:</u></p>	<p><u>Donor support</u></p>
<p>42. A1.1 Publication A1.2 Information available Through Internet A1.3 Enquiry Points A3.1 Advance Rulings A7.1 Pre-arrival processing A7.6 Establishment and Publication of Average Release Times</p>		Yes	Yes	Yes

A7.9 Perishable goods A8 Border Agency Cooperation A10.1 Formalities and Documentation Requirements A10.2 Acceptance of Copies A10.3 Use of International Standards A12 Customs cooperation A11.1-3 Transit Charges, Regulations, and Formalities A5.1 Notifications for enhanced controls or inspections A5.3 Test Procedures A7.2 Electronic Payment A7.4 Risk Management A7.5 Post-Clearance Audit A7.7 Trade Facilitation Measures for Authorized Operators A10.4 Single Window A1.4 Notification				
Current ODA programs (mohinga.info)				
Project name:	Funded by:			

Cluster #	II.3			
MTP Pillar	Pillar II: Trade Facilitation, Transport and Logistics			
Reform Area	Cluster II.3: Transport Infrastructure and Logistics			
Cluster Objective	Promote the simultaneous development of hard and soft transport infrastructure linking it with local economic development potential			
Contribution to Economic Policy Targets	#2, #4, #6, #7, #9, #12			
Challenges to be addressed		Proposed approach		
<p>The logistics services industry in Myanmar is still at an early stage of development. Development and expansion of transport and logistics service providers in Myanmar are limited by the lack of a clear regulatory framework, underdeveloped cargo insurance, and gaps in technological know-how. Logistics efficiency and reliability are determined by to what extent transport infrastructure, border agencies and transport regulators, and services providers interact in a predictable and efficient manner. As transport infrastructures are still underdeveloped due to the nature and focus on domestic trade by road in past decades, Myanmar is missing out on a number of international trade expansion opportunities.</p>		<p>Tackling both the soft and hard infrastructure at the same time is critical: first, develop and roll out an economic-corridor program to link the development of transport infrastructure and logistics services with trade development projects to ensure that these transport infrastructure development plans are well linked with local economic potential and connect this potential to the nearest growth poles. This also calls for a proper institutional framework for implementation to be prioritized. In this regard, a coherent, multi-stakeholder effort could help to remove bottlenecks to private investment in transport infrastructure, freight logistics services. Finally, the quality of logistics services could be improved by capacity building in the supply chain, phasing out restrictions on foreign companies in domestic distribution services and facilitating the development of cargo insurance. Introducing more cost effective and “green” freight transport is to be considered, e.g. freight rail and inland waterway to relieve pressure on roads for bulk transport</p>		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
43. Review practices in in-land border trade, and invest in infrastructures at border check points	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov’t funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	No
44. Develop a fee-based vocational training program to strengthen the capacity of freight forwarders and customs brokers in logistics, documentation, cargo handling,	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov’t funding:</u>	<u>Donor support:</u>

insurance, and transport management issues, including multi-modal.	No	Yes	No	Yes
45. Expand the use and stimulate the development of bonded warehouses through the identification of suitable locations at and near ports, airports, industrial zones, and special economic areas. Ensure that all bonded warehouses are equipped with modern ICT, EDI and inventory management capabilities.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	Yes
46. Increase amount of public land used for container yards, allowing more companies to operate, increasing competition and reducing costs.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	
<u>Long Term Actions:</u>				
47. Update air and marine regulations so that they are consistent with international standards	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	No	Yes	No
48. Update inland water, rail and road transport regulations in order to improve quality of service	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	No	Yes	No
49. Upgrade night navigation in Yangon river to allow ship to call ports past midnight and review tariff structure to increase container turn-around	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	No
50. Establish a Multimodal Transport Master Plan to plan and coordinate transport infrastructure development in the country in the long run (5–10 years).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	Yes
51. Conduct feasibility study with PPP options for investment in logistics park and island container depot	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	No	No
52. Improve Yangon-Mandalay Expressway to allow containerized trucks	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>

	Yes	Yes	Yes	Yes
53. Review constraints for development of quality logistics services and remove constraints through dedicated technical assistance actions	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
Current ODA programs (source: mohinga.info)				
Project name:	Funded by:			
Dry Port Projects at Ywarthargyie (Yangon) and Myitnge (Mandalay)	PPP			
Korea-Myanmar Friendship Bridge	Korea EXIM Bank			
MaubinPyapon Road Rehabilitation Project	Asian Development Bank			
Upgrade the transportation infrastructures	PPP			
Yangon-Mandalay Railways Line Improvement Project	Government of Japan			
East-West Economic Corridor Improvement Project	Government of Japan			
Yangon Circular Railway Line Upgrading Project	Government of Japan			
Yangon-Mandalay Railway Improvement Project Phase 1	Government of Japan			
Infrastructure Development Project in Thilawa Area Phase 1 (2)	Government of Japan			
Project for Construction of New Thaketa Bridge	Government of Japan			
Project for Installation of Operation Control Centre System and Safety Equipment	Government of Japan			
The Project for Improvement of Road Construction and Maintenance Equipment in Kachin State and Chin State	Government of Japan			
The Project for Port EDI for Port Modernization	Government of Japan			
Project for Improvement of Road Construction and Maintenance Equipment in Rakhine State	Government of Japan			
Greater Mekong Subregion East–West Economic Corridor Eindu to Kawkareik Road Improvement Project	ADB			
MaubinPyapon Road Rehabilitation Project	ADB			

Cluster #	III.1			
MTP Pillar	Pillar III: Quality Infrastructure and Standards			
Reform Area	Cluster III.1: Quality Infrastructure			
Cluster Objective	Ensure that Myanmar's future quality infrastructure meets both service provision and trade facilitation needs			
Contribution to Economic Policy Targets	#1, #2, #3, #4, #6, #7, #11, #12			
Challenges to be addressed		Proposed approach		
Deficiencies in Myanmar's national quality technical infrastructures are noticeable in the fields of standardization and metrology as a result of inadequate human resources, equipment and facilities. Standards are outdated, accreditation capacities are almost non-existent, and certification capacities are underdeveloped. Most export-oriented production in Myanmar struggles to comply with important technical regulations and voluntary standards. The quality requirements are largely informal and few producers demand the full array of services offered by a modern quality infrastructure.		Draw from international best practice in establishing a quality infrastructure free from conflicts of interest and to assess demand for services and calibrate the future quality infrastructure carefully to meet this demand. Building capacity to manage quality requires a step-wise approach. It will be important for producers, exporters and the government and development partners that support them to be aware of export markets' quality demands and the challenges that production of the right quality pose. Then, the need for quality infrastructure bodies, public and private, should be assessed, and their development plans carefully, in line with demand for services		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
54. Review current progress with respect to standards, technical regulations and conformity assessment procedures, so as to take stock of specific areas in which efforts have yet to start	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
55. Support to public and accredited private laboratories, establish new laboratories to test physical analysis, phytosanitary and fumigation, chemical residues, food quality testing	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
56. Implement the roadmap to establish the Myanmar accreditation body agreed between the Accreditation Division from National Standards and Quality Department under the Department of Research and Innovation, UNIDO and PTB	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	Yes
57. Develop a national repository of all mandatory/voluntary standards	<u>Advocacy to Cabinet:</u>	<u>Advocacy to</u>	<u>Gov't funding:</u>	<u>Donor support:</u>

		<u>MSTFBTP:</u>		
	Yes	Yes	Yes	Yes
58. Implement a pilot project to link selected labs together to conduct collective training sessions, proficiency tests and joint tests. Capitalize on existing experience to proceed to inter-laboratory joint measures testing. Based on pilot success, establish a memorandum of understanding between the various labs to formalize working arrangements and confirm long-term collaboration.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	Yes	Yes	Yes
59. Enable a specific committee, such as the TBT or SPS national committees or the NTM national committee, to act as a formal public and private dialogue forum to ensure coordination and cooperation in the QM function.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	Yes	Yes	Yes	No
<u>Long Term Actions:</u>				
60. Increase regional and international collaboration with NSBs to align Myanmar standards to regional and international ones (already in 5 year plan and budget plan).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	No
61. Ensure regular testing of accredited trainers, auditors and inspectors to ensure adequacy of training and inspections in line with international best practice.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	No	No
62. Establish a central database, managed and maintained jointly between QM institutions, for the collection, storage and dissemination of technical market requirements	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
63. Assess demand for standards and quality infrastructure through value chain studies and targeted capacity building program for government quality infrastructure and other methodologies. Initiatives can be built by refining existing studies to ensure that they are tuned into demand. Increase awareness of and capacity of applying good practice on technical regulation and quality infrastructure	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support:</u>
	No	No	Yes	Yes
Current ODA programs (source: mohinga.info)				
Project name:		Funded by:		

ASEAN Connectivity Through Trade And Investment (ACTI)	USAID
Enhancing Rural Livelihoods and Incomes	Japan Fund for Poverty Reduction
Myanmar - Strengthening National Quality Infrastructure(NQI) for trade	Government of Norway
Myanmar Inspection and Testing Services' Initiatives 2015-2016	Multiple Donors
Myanmar Trade Development Programme	European Union
Private Sector Development Activity	USAID
Strengthening Quality Infrastructure in Myanmar	BMZ - Germany Federal Ministry for Economic Cooperation and Development
Establishment of a European Chamber of Commerce in Myanmar (ECCM)	European Union

Cluster #	III.2			
MTP Pillar	Pillar III: Quality Infrastructure and Standards			
Reform Area	Cluster III.2: Sanitary and Phytosanitary Measures (SPS)			
Cluster Objective	Upgrade Myanmar's SPS ecosystem in line with international standards to meet suppliers' demand for SPS certification			
Contribution to Economic Policy Targets	#1, #2, #3, #4, #6, #7, #12			
Challenges to be addressed		Proposed approach		
<p>The lack of sanitary and phytosanitary (SPS) infrastructure prevents agricultural commodities producers from diversifying export destinations and reaching out to higher-end markets. The lack of certification and good logistics makes high-end markets, where quality products can fetch high unit values, largely unattainable. Producers rely on the marketing networks of intermediaries with only weak quality management capabilities and little strategic vision. In parallel, there is a lack of coordination in the process of developing technical regulations and rules for SPS management. This effort is typically led by individual ministries without sufficient consultation with other branches of government, with the private sector. This uncoordinated approach to regulation leads to overlaps between government ministries and low awareness among the private sector of the legal framework. Much of the SPS regulatory framework is out of date and out of line with international best practice, and/or remains unimplemented.</p>		<p>The solutions involve meeting the demands of buyers with various levels of demand in terms of quality and SPS certification. This requires both a legislative/ regulatory modernization effort and a capacity-building effort, establishing guidelines for SPS management according to international practices. This includes as well the development of an SPS certification infrastructure in ministries involved in setting and enforcing standards and develop a national accreditation body in line with regional and international commitments made by Myanmar, while avoiding conflicts of interest with the potential for rent-seeking opportunities when introducing technical regulations and mandatory standards.</p>		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
64. Update its list of SPS Contact Points in Annex 10 of the ATIGA;	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	
65. Establish guidelines for SPS management according to international practices and develop SPS Management Capacity in relevant agencies accordingly	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

	No	Yes	Yes	Yes
66. Plan upgrading laboratories and laboratory policies in order to develop more SPS laboratories	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
<u>Long Term Actions:</u>				
67. Develop and implement an arrangement for the control and eradication of diseases and pests, in line with Article 6 of the WTO SPS Agreement;	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
68. Conduct plant pest surveillance	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
69. Conduct food safety surveillance	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
70. Upgrade university SPS curricula plant and animal products	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>		<i>Funded by:</i>		
<u>Oilseeds and fisheries projects on SPS</u>				

Cluster #	IV.1			
MTP Pillar	Pillar IV: Private Sector Development			
Reform Area	Cluster IV.1: SME Development			
Cluster Objective	Enhance the role of SME in local, sub-national and regional development by providing a stable, predictable and inclusive environment for the private sector to prosper			
Contribution to Economic Policy Targets	#2, #3, #5, #6, #7, #12			
Challenges to be addressed		Proposed approach		
While Myanmar's broader policies for private investment have greatly improved in recent years, private sector development, especially SME development is still hampered by multiple bottlenecks. The broader regulatory framework and enabling business environment still have room for improvement. Private sector development requires strong measures to address issues of transparency, public sector governance, access to markets and business opportunities for all segments of Myanmar society, wherever they are.		Combined efforts by the private sector, the public sector and development partners are needed in parallel to tackle the formidable challenges of PSD in Myanmar. Sustain efforts to support general private sector development (SME development centres, trade training, fostering awareness on technology and innovation), the deployment with development-partner assistance, of private-sector development programs for upgrading SMEs' and entrepreneurs' capabilities in business processes quality management, innovation, market intelligence, are needed. In parallel, an Improved quality of laws and regulations relating to the private sector, improved transparency, predictability, and quality of the business environment, including through business associations and federations are necessary.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
71. Pass a new investment law, company registration and consider having negative list to limit discretion of line departments to restrict investment via ad-hoc decision	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
72. Build trade association capacity to market collectively, including associations with predominantly women members	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
		Yes	Yes	No
73. Develop and launch a comprehensive Regulatory reform program to improve the quality of Myanmar's business environment	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

	Yes	Yes	Yes	Yes
74. Reconsider the requirements for SME to settle advance income tax and consequently the responsibility to collect income tax through the customs process	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	No	No
75. Create incentives to encourage foreign firms to transfer skills to their Myanmar partners	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	No	No
76. Document structural barriers faced by women in setting up businesses	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
77. Make it easier for overseas Myanmar men and women to start or invest in local businesses	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
<u>Long Term Actions:</u>				
78. Support to automation of key trade processes	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
79. Improve enforcement of tax laws to encourage business formalization and decrease the size of the informal economy	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	No	No
80. Enhance industrial development policy	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
Capacity Strengthening for Private Sector Development in Myanmar	BMZ and EU			
Entrepreneurship Development and SME support in Myanmar	ILO			
Support for Business Innovation Facility (BIF) activities in Burma	DFID			
Strengthening Institutions for a Better Investment Climate	ADB			

Cluster #	IV.2			
MTP Pillar	Pillar IV: Private Sector Development			
Reform Area	Cluster IV.2: Access to Trade Finance			
Cluster Objective	Improve access to finance for SMEs and upgrade enabling framework and regulations for trade finance			
Contribution to Economic Policy Targets	#1, #6, #7, #8			
Challenges to be addressed		Proposed approach		
Access to finance for firms is extremely low, very few private sector firms borrow from commercial banks. Most commercial transactions in the economy are settled in cash due to the absence of a modern payment system infrastructure to process payments. The country has some of the lowest levels of penetration of financial services in the world and the nature of banking services is rudimentary. Trade finance products are still underdeveloped, making private sector development opportunities, and in particular SME development, limited. These have to do in particular with Myanmar's legal and institutional framework for finance, its regulation of trade finance, banking sector capacity, and the creditworthiness of Myanmar enterprises.		Support trade competitiveness by bringing regulation of payments for exports and imports in line with global standards, strengthen exports by giving exporters internationally comparable access to trade finance mechanisms and products and make public administration of the financial sector more transparent and conducive to sector development by reviewing and updating the legal, regulatory and institutional frameworks for trade finance		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
81. Improve exporter knowledge of available financing, how to qualify for it and how to use it	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
Long Term Actions:				
82. Level the playing field between local and foreign firms by allowing local firms to use foreign banks	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	No
83. Review legislations and practices for banks to facilitate trade finance	<u>Advocacy to Cabinet:</u>	<u>Advocacy to</u>	<u>Gov't funding:</u>	<u>Donor support</u>

instruments at market prices		<u>MSTFBTP:</u>		
	Yes	No	Yes	No
84. Adopt a law establishing a national Export-Import Bank dedicated to strengthening Myanmar' Participation in international Trade and prepare the EXIM Bank Law in cooperation with MOC and CBM	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No

Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)

<i>Project name:</i>	<i>Funded by:</i>
Expanding Financial Access (EFA)	Pact Global Microfinance Fund (PGMF), UNCDF, UNDP
Financial Sector Development in Myanmar (FSD)	BMZ
Myanmar: Modernization of Public Finance Management Project	World Bank
Project for Development of ICT System for Central Bank of Myanmar	Government of Japan
Shaping Inclusive Finance Transformations (SHIFT)	Government of Australia (ACIAR)
SME Lending Programme (SELP)	BMZ

Cluster #	IV.3			
MTP Pillar	Pillar IV: Private Sector Development			
Reform Area	Cluster IV.3: Access to Trade Information			
Cluster Objective	Improve access to and provision of up-to-date, customized and user friendly trade information			
Contribution to Economic Policy Targets	#2, #5, #6, #7, #11, #12			
Challenges to be addressed		Proposed approach		
There is a considerable lack of trade information 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. Enterprises often rely on the information available from the BIU of UMFCCI or the Trade Promotion Department of MoC. However, trade information gathered through this route is generic and not applied to the needs of Myanmar and it lacks a depth of information on international market conditions. Myanmar enterprises or associations suffer from a lack of information on international databanks and other forms of TI provided by international institutions		Both the supply and demand-side constraints need to be addressed systematically: Institutional constraints refer to supply-side issues related to the service delivery of trade support institutions to SME, 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. This can be achieved by improving the collection, the reach, relevance quality and timeliness of TI of TI within Myanmar.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
85. Organize training workshops for TSI representatives on data collection and data processing	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
86. Ensure trade attachés posted in overseas missions and embassies have knowledge and information on trade and investment opportunities.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
87. Improve intelligence on third market requirements for current and potential exporters	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	No

88. 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.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
89. Acceleration the adoption of new business-related (companies law) laws and implementation of the recently enacted new business-related laws (Investment Law, Arbitration Law, Financial Institutions Law)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
<u>Long Term Actions:</u>				
90. 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	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
91. Invest in e-government to enable all agencies involved in administering trade to share information and offer their services to businesses through a national 'single window' & E-customs, with inputs and support from the private sector and development partners	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
ASEAN Connectivity Through Trade And Investment (ACTI)	USAID			
Capacity Development for Trade-Investment Promotion and Establishment of Master Plan on the Myanmar Trade-Investment Promotion Agency (MYANTRA)	KOICA			
Initiating the setting-up of a National Trade Information Network in Myanmar	DFID			
Myanmar Marketing Research & Development's Initiatives	Private sector			
Myanmar Trade Development Programme	European Union			
Project for the Capacity Development of Trade Promotion in Myanmar Phase II	JICA			
Shaping Inclusive Finance Transformations (SHIFT)	Government of Australia (ACIAR)			

Cluster #	V.1			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.1: Rice sector			
Cluster Objective	Create the conditions for a steady increase in quality and quantity of high quality rice exported formally to new markets			
Contribution to Economic Policy Targets	#4, #6, #7			
Challenges to be addressed		Proposed approach		
<p>Myanmar was once the world's top rice exporter. Decades of sanctions and a poor enabling environment for high quality paddy rice exports have dented the capacity of the country to diversify its exports. Today 95 percent of Myanmar's rice exports are of low quality rice (World Bank, 2014c). This focus on low quality puts the country in jeopardy, because the global consumer demands higher quality rice. In addition, significant shares the rice produced are exported informally across the borders into China and Thailand, where they are processed and marketed, or further exported. This means that Myanmar is losing out both in terms of value addition and job opportunities, which are being lost to neighboring countries. Myanmar has more than 1,000 varieties and unfortunately mixes them up: mixing rice varieties causes several problems</p>		<p>Improving quality will require building capacity in a quality infrastructure and in phytosanitary management. Myanmar could intervene in the value chain and build capacity in its quality infrastructure and phytosanitary management. In terms of production, new investments in order to upgrade its old rice mills as outdated milling equipment are needs, results. Going further downstream, better extension services and provision of seed would also help farmers to improve quality. Finally, basic supply chain interventions are needed, such as promoting better rice varieties and improving cultivation practices. Finally, It will be important for Myanmar to abandon the Beale system and replace it with an internationally recognized system that allows its rice to be sold by variety.</p>		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
92. Accelerate implementation of SPS protocol with China for export of quality rice so as to improve SPS management for rice exports (following Cambodia model)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	No	No
93. TA to abandon the Beale rice classification system of mixed rice variety and replace it with a system allowing rice to be sold for export by variety.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
94. Train Government officials on the methodologically sound production of rice sector statistics so that public and private stakeholders can make well-	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

calculated investment and marketing decisions.	No	Yes	Yes	Yes
95. Train small-scale millers in best practices, as a way of raising the country's overall rice quality	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
<u>Long Term Actions:</u>				
96. Targeted interventions in the rice value chain by to improve quality and yields from most farmers by using high-quality seeds, including a high percentage of hybrid seeds, greater numbers of distributors for fertilizer and pesticides, as well extension services to train farmers in their use, greater numbers of vendors and service providers for irrigation and drainage systems and greater numbers of distributors and service centres for farm machinery.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
97. Access to higher-value markets thanks to the availability of organic certification and other international recognized quality certification developing the ability to consistently meet quality standards demanded by big buyers in higher-value markets	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
98. Develop training solutions for mechanized farming across the major rice-producing regions of Sagaing, Ayeyarwady, Bago, Yangon, Rakhine and Mon	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	
99. Provide small farmers with model agreements, procurement assistance and technical training that will allow them to confidently purchase communal dryers and warehouses at the village level	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
Agricultural Development Support Project	World Bank			
Diversification and Intensification of Rice-based System in Lower Myanmar	Government of Australia (via ACIAR)			
Eastern States Agribusiness Project	International Fund for Agricultural Development & Export-Import Bank of Korea			
Enhancing Rural Livelihoods and Incomes	Japan Fund for Poverty Reduction			
Fertilizer Sector Improvement	USAID			

Fostering Agricultural Revitalization in Myanmar Project	International Fund for Agricultural Development
Integrated Rice Complex Project	Myanmar Japan Rice Industry Co., Ltd
Integrated Rural Economic And Social Development Programme For Livelihoods Improvement In The Dry Zone Of Myanmar	LIFT Trust Fund
Introduction of Fortified Rice in Myanmar	LIFT Trust Fund
Irrigation Command Area Development Project	ADB
Irrigation Development Project in Western Bago Region	Government of Japan
Linking Laputta to Markets (LLM) Increasing Incomes through Agriculture, Skills, & Employment	LIFT Trust Fund
Myanmar Agricultural Policy Alternatives: Status, Opportunities and Risks	LIFT Trust Fund
Myanmar farmers innovation for rural development and environmental restoration	DANIDA
Project on Setting up of Rice Biopark	Government of India
Project on the Development of Participatory Seed Multiplication and Distribution System for quality Rice Seed	JICA
Promotion of Renewable Technology in the Rice Milling Sector in Myanmar	UNIDO
Reducing Risks And Improving Livelihoods In The Rice Environments	LIFT Trust Fund
Socio-economic and Environmental Development In Bogalay Township (SEED)	LIFT Trust Fund
Stress Tolerant Rice in Vulnerable Environments	USAID
Support to the Development of Hybrid Rice in Myanmar	Food and Agricultural Organisation (FAO)
MYANTRADE Master Plan	KOICA
Capacity Development on Trade Promotion Project	JICA

Cluster #	V.2			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.2: Beans, Pulses and Oilseeds Sector			
Cluster Objective	Increase the value added in Myanmar in the beans, pulses and seeds sector by removing technical and logistics constraints and increased exports using formal channels			
Contribution to Economic Policy Targets	#4, #6, #7, #8			
Challenges to be addressed		Proposed approach		
While Myanmar is one of the top exporters of beans, pulses and seeds, significant challenges are hampering the sector's contribution to exports value. While compliance with quality requirements are not a major concern, logistics, in particular the difficulty of coordinating purchasing operations from a multitude of small farmers, or from an export procedure side, the slow handling of applications for permits by Government agencies. Value added into the product in Myanmar (packaging, etc) is still minimum and the potential to export processed or semi-processed products is still very limited.		To tap into the significant demand for quality agricultural products from India, Japan and China, better agricultural value chains are needed, thus providing rural poor communities with opportunities for higher incomes. Value addition activities, such as sorting, processing and packaging, have great potential. It is therefore important to increase the sector's production and productivity through enhanced farming techniques, upgrading of farmers' capacities, improved infrastructure and a reliable supply of quality inputs, Strengthen cooperation and efficiency by enhancing inter-institutional collaboration and private–public partnerships; and Strengthen the sector's ability to add value to its product through enhancing business management capacities and modernizing processing facilities and techniques;		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
100. Organize more trade missions to selected target markets for business owners from the pulses, beans and oilseeds sector, with the help of UMFCCI and MoFA.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
101. Develop new branding of pulse, bean and oilseed products	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
102. MPBSMA to expand its mandate to represent the various stakeholders of the sector	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

	No	Yes	No	No
Long Term Actions:				
103. Monitor the production of quality products along the supply chain	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
104. Promote R&D for new varieties of higher yield and better quality by strengthening and modernizing R&D centres, capacity-building and monitoring of market demand.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
105. Upgrade existing laboratories and establish new laboratories to test physical analysis, phytosanitary and fumigation, chemical residues, food quality testing (carbon testing, benzopyrene)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
Project name:	Funded by:			
Agricultural Development Support Project	World Bank			
Creation of a Microfinance Institution in the Dry Zone	LIFT Trust Fund			
Eastern States Agribusiness Project	International Fund for Agricultural Development			
Enhancing Rural Livelihoods and Incomes	Japan Fund for Poverty Reduction			
Fertilizer Sector Improvement	USAID			
Fostering Agricultural Revitalization in Myanmar Project	International Fund for Agricultural Development			
Improving Food Safety and Compliance with SPS Measures to Increase Export Revenues in the Oilseeds Value Chain	STDF			
Increasing productivity of legume-based farming systems in the central dry zone of Burma	Government of Australia (via Australian Centre for International Agricultural Research (ACIAR))			
Integrated Rural Economic and Social Development Programme for Livelihoods Improvement in the Dry Zone Of Myanmar	LIFT Trust Fund			
Irrigation Command Area Development Project	Asian Development Bank			
Irrigation Development Project in Western Bago Region	Government of Japan			
Myanmar Access to Rural Credit Through Institutional Strengthening (MARC) Project	LIFT Trust Fund			

Myanmar farmers innovation for rural development and environmental restoration	DANIDA
Myanmar Microfinance Development Program	LIFT Trust Fund
Myanmar Trade Development Programme	European Union
Socio-economic and Environmental Development in Bogalay Township (SEED)	LIFT Trust Fund
Support to Savings-led Microfinance Market Leaders to Enter Myanmar (Microlead Expansion Programme)	LIFT Trust Fund
MYANTRADE Master Plan	KOICA
Capacity Development on Trade Promotion Project	JICA

Cluster #	V.3			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.3: Corn Sector			
Cluster Objective	Diversify exported products and export market by sustained development of processing capacity, increased market intelligence and better marketability of Myanmar corn			
Contribution to Economic Policy Targets	#4, #6, #7, #8			
Challenges to be addressed	Proposed approach			
Corn is used in Myanmar as food for humans, livestock feed and bio-fuel, and is a globally prioritized industrial flex crop. Corn production in Myanmar is expected to grow to 2.1 MMT in 2016/17 due to increased corn growing area and strong international demand of Myanmar maize have increased steadily over the years, with 95% of exports going to China through border trade. Other markets include Bangladesh Malaysia, Thailand. Most Myanmar corn is produced in the central part of the country, mostly in particular in Shan State. As the demand for maize has been increased annually since 2009, production has been tried as a more year-round production. The reason for high profitability of maize production in Shan State is its proximity to China, which facilitates the region's use of high-yielding hybrid seeds and enables it to sell output at remunerative prices to China. Challenges abound in the sector, with some not particularly attached to corn. Exported products do not generate value added in Myanmar as very little processing happens. The sector stakeholders are not yet organized in an efficient steering body, limited collective bargaining. As most export are border-trade with neighboring China, export market and product diversification has been limited, in spite of growing global demand.	<p>Many efforts are required to promote the efficiency of Myanmar's corn sector export including efforts from production by rural smallholder producers linked into the globalizing of production supply chain. A strategic approach will be required to identify the mode of production with a combination of policy improvements, institutional and capacity and investments carried out in a sequenced manner. Increased cooperation between Government institutions, as happens for the rice sector for instance, will also be beneficial for corn.</p> <p>Short to medium term actions on the trade side includes better market intelligence on corn, including type of products and products requirement from importing markets, better collective organization of the sector, and increased value added in Myanmar. This will probably support the diversification of export and export routes.</p>			
Actions to be undertaken	Resource Requirements			
Short to Medium Term Actions:				
106. Negotiate quotas of officials export of corn to China, through road and sea transport	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	No

107. Identifying of Policy Reforms for the enhancement of capacity building of farmers to better assess export market needs and requirements	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	No
108. Promote expansion of export varieties	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
109. Strategy development for a sector steering body establishment	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
<u>Long Term Actions:</u>				
110. Capacity development at processing level to diversify products exported	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
111. Strengthen market linkages with other Asian markets (Singapore, India, Malaysia, Indonesia)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	<u>No</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
112. In line with MCFA long term plan road map, invest in dedicated facilities for export (storage, warehousing, conservation)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	<u>Yes</u>
113. In line with MoALI's plan of action, invest in supply chain infrastructure along all spatial segments of the food supply chain	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
Project name:		Funded by:		
Livelihood and Food Security Trust Fund (LIFT)		Multi-donor Trust Fund administered by the World Bank		
Agricultural Development Support Project		World Bank		

Enhancing Rural Livelihoods and Incomes	Japan Fund for Poverty Reduction
Fertilizer Sector Improvement	USAID
Fostering Agricultural Revitalization in Myanmar Project	International Fund for Agricultural Development
Myanmar farmers innovation for rural development and environmental restoration	DANIDA
Myanmar Trade Development Programme	European Union
MYANTRADE Master Plan	KOICA
Capacity Development on Trade Promotion Project	JICA

Cluster #	V.4			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.4: Fruits and Vegetables Sector			
Cluster Objective	Promote and produce certified quality fruits and vegetables for export diversification			
Contribution to Economic Policy Targets	#4, #6, #7, #8			
Challenges to be addressed	Proposed approach			
Myanmar has enormous potential to upgrade both domestic markets as well as taking a leading position with the export of fruit/ vegetables and high quality seeds. The development of a vibrant fruit and vegetable sector which benefits smallholders with income and employment opportunities hinges on private sector investment into the seed industry, logistics, market development etc. With increasing demand on both domestic and export markets, it is time for Myanmar to consider issues such as access to high quality seed and the transfer of knowledge needed to enable farmers and other actors in the value chain to produce high quality and safe to eat fruits and vegetables. To diversify farming system successfully with fruits and vegetables which have shorter in-shelf life, poor storability, there are many requirements such as transportation, storage, handling, packing, value addition and effective distribution system. Most fruit and vegetable farming is still done under traditional practices. Quality remains relatively poor, yields are low, and income potential for farmers from their efforts and investments is also low. Key challenges faced by producers in Myanmar include (1) lack of access to production knowledge, (2) lack of access to affordable finance, and (3) uncertainty in the markets.	<p>Complementing existing plans and policies spearheaded by MoALI and corresponding task forces, the trade-centred approach is to increase awareness and information on fruits and vegetables export potential, market requirements and feedback information to organized growers/processors.</p> <p>Development of the fruit and vegetable sector should be market driven. The demand (qualitatively and quantitatively) for fruit and vegetable and safe produce in both domestic and export markets will be the basis for planning and developing future support programmes, leading to sustainable growth and development by helping farmers to deliver a better choice of high quality and safe to eat fruit and vegetables.</p> <p>Growers have intention to add value to their products for better marketability and, if possible, access to foreign markets. While short term actions call for more analysis and information on export potential, in the long run, public and private sector investment in cold storage facilities, systematic packing facilities, cool chain facilities and the promotion of Good Agricultural Practices (GAP) standards are needed.</p>			
Actions to be undertaken	Resource Requirements			
<u>Short to Medium Term Actions:</u>				
114. Identify strategic fruit and vegetable for export and develop export promotion strategy for selected item	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes

115. Developing a strong seed sector, stimulating foreign direct investment in seed sector by making the rules easier, clear, transparent and consistent and creating a National Seed Association NSA	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
116. Improving access to commercial production knowledge: assure appropriate messaging and marketing of extension, update information on banned products, best practices in production and post-harvest handling, integrated pest management (IPM)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
117. Work with the emerging supermarket/high-value retail sector or vegetable processing industry to pilot contract farming or out-grower schemes with smallholders who will be provided training and support on improved cultivation and product quality.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
118. Improve market information flow from consumer to producer (quality, quantity, price) and promote development of demand-driven grading and sorting standards for vegetable crops that can be communicated from market to grower via such systems	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
119. Creating markets for high-quality vegetables, by improving market information systems (formal and informal) to convey information on quality and quantity demand in addition to price data	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
<u>Long Term Actions:</u>				
120. Strengthen in the capacity of an association that can represent the wholesale sector and start dialogues and cooperation with other traders, government, etc.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
121. Improve supply chain logistics and technology – harvesting tools, hygienic containers, cleaning, sorting, waxing, packing, cooling equipment/technology, storage facilities (basic and refrigerated).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
122. Implement and build consumer confidence in a local level of GAP – export-ready (Global) GAP as a next step, for both pre-harvest and post-harvest best practices and develop awareness and adoption programs for both growers and private companies.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes

123. Strengthen institutional capacity of Fruit and Vegetable Associations, clusters, producer groups to form a Federation to represent Myanmar Fruit and Vegetable Sector	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
124. Improve existing infrastructure and building new ones to facilitate connectivity	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
Project name:	Funded by:			
Livelihood and Food Security Trust Fund (LIFT)	Multi-donor Trust Fund administered by the World Bank			
Agricultural Development Support Project	World Bank			
Enhancing Rural Livelihoods and Incomes	Japan Fund for Poverty Reduction			
Fertilizer Sector Improvement	USAID			
Fostering Agricultural Revitalization in Myanmar Project	International Fund for Agricultural Development			
Myanmar farmers innovation for rural development and environmental restoration	DANIDA			
Myanmar Trade Development Programme	European Union			
MYANTRADE Master Plan	KOICA			
Private Sector Development Programme (Mango and Tea Value Chain Project) (2014- to date)	GIZ			
Value Chain for Rural Development Programme (Melon, Ginger, Coffee, Soybean) (2015-2017)	USAID through WinRock			
Institutional Capacity Building Programme for Fruit and Vegetable Association (2015-2018)	GIZ			
Production Capacity Building Programme/ Farmer to Farmer Programme (2013- to date)	USAID through WinRock			

Cluster #	V.5	
MTP Pillar	Pillar V: Value Chain Development and Export Diversification	
Reform Area	Cluster V.5: Agro-Food Processing Sector	
Cluster Objective	A private-sector oriented, export-focused strategy enables the development of multi-product agro-food processing industry	
Contribution to Economic Policy Targets	#4, #6, #7, #8	
Challenges to be addressed	Proposed approach	
<p>Myanmar agro-based industries are considered of high potential not only for import substitution but also for export promotion. Myanmar Agro-based Food Industry constitutes over 70 percent of both volume of production and number of firms in the industrial sector. It also employs the largest number of workers. The traditional food productions are mostly small family units spread all over the country. However, presently, most of Myanmar’s agricultural export consists of cheap, low value-added, unprocessed products. Myanmar could improve its agro processing industry using (rather than merely exporting) its agricultural products as raw material and raise profitability.</p> <p>Challenges are numerous that make the task of developing agro-food products daunting: low production capacity, use of traditional manufacturing techniques, lack of local brands, lack of awareness and understanding of what importing markets require, in particular norms and standards. Many efforts are required to promote agro processing industry product export including forward-looking and efficient government policies and institutional support with greater interaction among key stakeholders characterized by full transparency and accountability (such as to tackle the lack of FDI in the sector of the lack of accreditation organizations for processed foods for overseas market expansion).</p>	<p>The proposed approach to the development of the agro-industrial sub-sector in Myanmar is consistent with the themes of Myanmar’s <i>Agriculture Sector Development Strategy</i> to promote rural development in general, a shift from a commodity and sub-sector approach to a market-oriented farming systems and community based approach. When it comes to export of agricultural commodities, Myanmar should consider value addition through processing, exporting to markets in the region primarily, before considering other overseas markets. Government intervention in agro-food processing industry should be confined to creating a sound enabling environment and level playing field, promoting compliance with international norms, better control over imported food items, as agro-processing industry is best developed by the private sector.</p> <p>Cooperation for agriculture and food processing industry in Myanmar is required in the improvement of infrastructure, human resource, technology & equipment, food processing technology, domestic sales and export promotion of agro-products and foods. The emphasis is laid on the development of (1) domestic sales of agro-products and foods (with better linkages with local distribution system, supply chain network, wholesale & retail, restaurant industry) and (2) export promotion of agro-products and foods – with better logistics, export marketing, market information.</p>	
Actions to be undertaken	Resource Requirements	
Short to Medium Term Actions:		

125. Selection of exportable goods based on market intelligence, establishment of publicly available information on strategic export products, support for participation in international product fairs	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
126. Establishment of information on support programs for export, support on commercialization of export products;	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
127. Develop better packaging practices: exemption of import tariff on packaging material; establishment of training institution for packaging and design establishment of packaging and design centre;	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
128. Support for certification of processed products for export; marketing initiative for indigenous products	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
<u>Long Term Actions:</u>				
129. Enhance the potential crop items and diversification of cultivation of crops item	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	Yes
130. Provide tax incentives for domestic companies and FDI; control of border trade to secure domestic demand	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
131. Export-import link system and establishment of incubation centres for SMEs promotion establishment of quality control laboratories	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
132. Develop the production of organic products including understanding of the individual markets on which organic products to grow and participation in trade fairs and exhibitions and knowledge transfer to farms and players in the industry	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
133. Promote Myanmar Agro-based products as a quality brand and enhance competitiveness in international trade	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes

Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)	
Project name:	Funded by:
Livelihood and Food Security Trust Fund (LIFT)	Multi-donor Trust Fund administered by the World Bank
Agricultural Development Support Project	World Bank
Enhancing Rural Livelihoods and Incomes	Japan Fund for Poverty Reduction
Fertilizer Sector Improvement	USAID
Fostering Agricultural Revitalization in Myanmar Project	International Fund for Agricultural Development
Myanmar farmers innovation for rural development and environmental restoration	DANIDA
Myanmar Trade Development Programme	European Union
MYANTRADE Master Plan	KOICA
Capacity Development on Trade Promotion Project	JICA

Cluster #	V.6			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.6: Fisheries Sector			
Cluster Objective	Upgrade the fisheries sector sustainable production techniques to diversify export products and markets			
Contribution to Economic Policy Targets	#4, #6, #7			
Challenges to be addressed		Proposed approach		
<p>Myanmar has regularly encountered severe market access problems for its capture and culture fisheries products to the EU in the past. Myanmar has adopted EU regulations for fish products exports, although it only enforces them strictly for EU-approved factories. The system's effectiveness however is compromised by some deficiencies in its implementation, in particular, by weaknesses in official controls of water/ice and FP, state of hygiene of the vessels and landing sites and traceability. The existence of those deficiencies and deviations from the relevant EU regulations forced the FIQCD to submit an action plan on how to upgrade Myanmar's system. Only products from capture fisheries are approved, and Myanmar cannot export aquaculture products to the EU.</p>		<p>In general, Myanmar processors meet very varying quality requirements. Increasing the value added in Myanmar calls for an increase the long-term production and productivity of the sector through modernization of infrastructures, adequate financial support, and improved production and processing techniques; The organization of the sector should be enhanced through increased dialogue and partnerships as well as the implementation of effective policies for the management of fisheries resources for sustainable growth; The sector could also benefit from a customized branding of fishery products and sub-products, market opportunities in order to compete successfully in international markets.</p>		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
134. Build the branding of fishery products in order to compete successfully in international markets.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
135. Enhance the organization of the sector through increased dialogue and partnerships as well as the implementation of effective policies for the management of fisheries resources for sustainable growth.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
Long Term Actions:				
136. Implement a long-term training and certification programme for technicians, inspectors and trainers at DOF/Ministry of industry and processing	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

factories to be qualified on GMP/HACCP, Food safety and processing training to SMEs.	No	No	Yes	Yes
137. Update and promulgate new laws in favour of an harmonious development of the fisheries sector, including on access to land for aquaculture	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
138. Establish demonstration schemes on modern production technology to ensure effective adaptation /modernization of current technologies through collaborating with international and regional fisheries institutions.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
139. Upgrade/establish disease diagnosis/fish health/fish feed laboratories with up-to-date equipment to facilitate essential tests for fish health and international trade	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
140. Construct public cold storage facilities in major cities to better manage exports and imports of perishable goods.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
Project name:	Funded by:			
CBI Export Promotion Programme Fishery Products Myanmar	Government of the Netherlands (through CBI)			
Developing a Sustainable Seafood Industry Infrastructure in Burma	USAID			
Myanmar Trade Development Programme	European Union			
Project on Development of Inland Fish Farming Technology	KOICA			
Project for Small-scale Aquaculture Extension for Promotion of Rural Communities in Central Dry Zone	JICA			
Promoting Sustainable Growth of Aquaculture in Myanmar to Improve Food Security and Income for Communities in the Ayeyarwady Delta and Central Dry Zone (MYFish-Culture- MYFC)	LIFT Trust Fund			
Support To Savings-led Microfinance Market Leaders To Enter Myanmar (Microlead Expansion Programme)	LIFT Trust Fund			
Sustainable Small-Scale Fisheries and Aquaculture Livelihoods in Coastal Mangrove Ecosystems	Government of Italy			
MYANTRADE Master Plan	KOICA			
Capacity Development on Trade Promotion Project	JICA			

Cluster #	V.7			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.7: Forestry Sector			
Cluster Objective	Strengthen the organization and governance of the forestry sector to diversify export and make the sector environmentally and economically sustainable			
Contribution to Economic Policy Targets	#4, #6, #7			
Challenges to be addressed		Proposed approach		
The government banned the export of logs on April 1, 2014, causing a drastic change in the industry, which now needs to fulfill minimal processing requirements in order to be allowed to continue its dominant export business. An estimated 500,000 people depend on the production of forestry products, mostly in conflict states. There are controversies surrounding forestry because of the high rates of unsustainable and illegal logging. In addition, the government has great difficulty in controlling logging due to rampant illegal logging occurring on top of the already unsustainable production targets. As a result, the teak forests that have made Myanmar's forestry industry famous have become fragmented and greatly reduced in both quantity and quality. As a result, timber harvesting in Myanmar is currently unsustainable and has led to significant environmental damage and deforestation.		The introduction of forestry certification schemes could instill confidence in Myanmar's forestry management and attract new buyers. Myanmar currently has no internationally recognized certification system. The environmental and conflict externalities suggest that it will be important to strengthen the institutional mechanisms governing environmental sustainability, including streamlining administrative rules and procedures and assure reliable upstream supplies and the distribution of benefits before developing timber exports further.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
141. Improve the system in place for issuing exports licenses for timber products by simplifying and streamlining the administrative procedures and improving their transparency.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
142. Implement the strategy for the processing of low added value forestry products (such as teak fitches, squares, board, planks, etc.) targeting, among others, veneer treatment and mini-decking, with a view to increasing export value in Myanmar	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	Yes

143. Introduce a system whereby open tendering becomes the only way of purchasing raw timber materials	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
144. Introduce a policy to announce next year's estimated quota (for the tender) in a timely manner (i.e. before the end of the current year). Adopt a regular publishing of the allowable quotas for tendering by local industry in advance on a monthly basis.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
145. Set up a working group with private–public stakeholders to meet on a monthly basis to discuss developments and issues related to exporting and production (including taxes, investment, obstacles etc.). The working group should prepare policy notes and make proposals).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
<u>Long Term Actions:</u>				
146. Have Myanmar Forest Products and Timber Merchants' Association evaluate the practical measures it could adopt to raise awareness and punish offenders, including the possibility of implementing a blacklisting system against offenders.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	No	No
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
Addressing large-scale drivers of deforestation - Myanmar	Government of Norway			
Business Innovation Facility (BIF)	DFID			
Capacity building for developing REDD + Activities in the context of sustainable forest management	International Tropical Timber Organization (ITTO)			
Capacity Building for Forest Management to Address Climate Change	KOICA			
Community Forest for Kyauktan Township in Myanmar	JIFPRO			
Conflict Sensitive Forest Governance in Myanmar	DFID			
Establishing an international communication and networking hub for timber federations, national and regional industry bodies, and others in the forest sector	Private sector			
FLEGT in Myanmar: Laying foundations and Mobilising Civil Society	European Union			
Forest and Biodiversity in Myanmar	Government of Norway			
Improved Legality, Governance and Trade for Community and Smallholder Timber	Food and Agricultural Organisation (FAO)			

in Myanmar (Phase 1)	
Strengthening the development of the Myanmar Timber Legality Assurance System	Food and Agricultural Organisation (FAO)
Support To Savings-led Microfinance Market Leaders To Enter Myanmar (Microlead Expansion Programme)	LIFT Trust Fund
Support to the Forest Law Enforcement, Governance and Trade (FLEGT) Partnership Agreement Process in Myanmar	DFID
Transforming Global Markets for Timber and Agricultural Commodities: Legality, Resource Rights, Post-Conflict Scenarios, and Livelihoods	Multiple Donors
VPA Implementation support in Myanmar	European Forestry Institute
MYANTRADE Master Plan	KOICA
Capacity Development on Trade Promotion Project	JICA

Cluster #	V.8			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.8: Rubber Sector			
Cluster Objective	To foster innovation and sustainable growth in national and global rubber value chains			
Contribution to Economic Policy Targets	#4, #6, #7			
Challenges to be addressed		Proposed approach		
The rubber products sector suffers from low productivity mainly caused by the inferior quality of planting materials and inputs, the planting of low yield cultivars, and the low adoption of improved harvesting technology; low quality reducing value and affecting the ability to diversify into new export markets and from fragmented and small-sized agricultural holdings lead to low and unpredictable yields. In addition, key business environment constraints include a lack of dedicated regulation and law governing the rubber products sector and a lack of international accreditation for rubber testing laboratories in Myanmar results in reduced target market confidence for domestic exports;		Addressing the challenges and constraints identified include acting on both the identification of market development options for Myanmar exporters and on structural changes to the value chain that result in either strengthening of linkages or introduction of new structural linkages. This includes establishing the regulatory framework and national quality infrastructure for a sustainable and competitive sector along the value chain and promote Myanmar's natural rubber and related rubber products industry domestically and internationally.		
Actions to be undertaken		Resource Requirements		
<u>Short to Medium Term Actions:</u>				
147. Establish a Rubber Board to oversee all activities in rubber products industries, upstream, downstream, marketing. Prepare operational and management guidelines, and necessary legislation and regulations for the establishment of a Rubber Board.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
148. Promote Myanmar's natural rubber and related rubber products industry internationally.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
149. Carry out a feasibility study for setting up a Myanmar Rubber Trade Promotion Committee (MRTPC).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes

150. Conduct a feasibility study on establishing a Rubber Development Fund for the sector.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
151. Introduce a registry system for nurseries, which should be maintained regularly by MoALI (DICD).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
<u>Long Term Actions:</u>				
152. Issue quality analysis certificates and obtain international accreditation of labs.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
GRO-Myanmar (Generating Rubber Opportunities in Myanmar)	SDC			
Pilot project for rubber sector in Karen State	Mynor Ltd., NORAD			
Upgrading the MRPPA Quality Control Laboratory Project	METI-HIDA, MRPPA, National Budget			
MYANTRADE Master Plan	KOICA			
Capacity Development on Trade Promotion Project	JICA			

Cluster #	V.9			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.9: Garment Sector			
Cluster Objective	To facilitate job creation and export development in the garment sector through cross-cutting and sector-specific policy measures			
Contribution to Economic Policy Targets	#2, #4, #6, #7			
Challenges to be addressed		Proposed approach		
Most constraints on Myanmar’s garment sector attractiveness in the are largely cross-cutting. Garments factories need highly predictable and programmable environments, and seamless border crossings. Complicated procedures or congestion at the border resulting in variable container dwell times act as deterrents. Further upstream, the garment sector does not have the production capacity to meet all demand: the highly varied products demanded by Myanmar’s largest market, Japan, strain the sector’s capacity to produce small, highly differentiated garment orders, garment firms struggle to meet buyer requirements for quality. There is a shortage of workers with the skills needed for the sector’s growth and high worker turnover disrupts production and is a disincentive to workforce skill development		Substantially increase production and exports of apparel according to international quality standards in particular for attracting offshored garment activities are needed. Thai and Chinese textiles/garments investors looking for alternative locations for garment manufacturing could view Myanmar as an attractive platform given its pool of labor at relatively competitive wage costs. For this to happen, the Government should Map out and implement reforms and capacity-building for Myanmar firms to participate in GVCs, by partnering with Myanmar Garment Manufacturers Association’s (MGMA) and support its 10-year strategic development plan, including through the development of “clusters” and dedicated infrastructure with good transport and logistics connections.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
153. Extend the same duty exemptions enjoyed by importers of CMP inputs to importers of FOB inputs, an advantage typically enjoyed by Myanmar’s competitors and critical to making the CMP-to-FOB transition profitable.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov’t funding:</u>	<u>Donor support</u>
	Yes	Yes	No	No
154. Establish a working group to reduce the number and processing time of official procedures for garment factory start-up (e.g. registration, so that start-up time is reduced from four or five months to one month).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov’t funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
155. Commission a feasibility study to review potential SEZ or STGZ sites and	<u>Advocacy to Cabinet:</u>	<u>Advocacy to</u>	<u>Gov’t funding:</u>	<u>Donor support</u>

make recommendations on location, size, infrastructure, rates, ownership and management structures, services, impacts, risks, etc.		<u>MSTFBTP:</u>		
	Yes	Yes	Yes	No
156. Articulate regulations for the trained worker retention clause of the Employment and Skill Development Law and enforce them, so that employers and workers may engage in meaningful contracts by which employees receive advanced training from firms in exchange for commitments to stay with those firms for an agreed period, thereby incentivizing employer investment in Myanmar labor	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	No
157. Implement a vocational programme for machine operation and maintenance, production management, industrial engineering, fashion design and computer assisted design operations.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	Yes
158. Form a high-level policy steering body (e.g. Inter- ministerial committee) dedicated to the coordinated formulation and implementation of strategic policies and initiatives for the promotion of the textile and garment sector.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
<u>Long Term Actions:</u>				
159. Implement a “garment development plan” with assistance from development partners	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
Business Innovation Facilities (BIF)	DFID			
Fostering Pro-poor and inclusive MSME Development in Myanmar (Pilot Weaving Cluster Development Initiative)	Government of Italy			
Reinforcing Capacities of the Government and social partners to build a Garment Sector industry development strategy	Government of Switzerland			
SMART Myanmar – Phase I& Phase II	European Union			
MYANTRADE Master Plan	KOICA			
Capacity Development on Trade Promotion Project	JICA			

Cluster #	V.10			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.10: Gems and Jewelry Sector			
Cluster Objective	Enhance revenue-generating gem and jewelry industry to generate value added in manufactured and exported jewelry products and ensure sustainable sector development			
Contribution to Economic Policy Targets	#4, #6, #7			
Challenges to be addressed		Proposed approach		
<p>Myanmar is the world's leading producer of precious stones such jade, rubies, sapphires, and gold pearls and can count on a large reserve of gold and silver. However, production of precious gemstones does not guarantee high value-added input in the gem and jewelry industry: while the gem and jewelry industry has been an important source for exports products are unworked, simply sawn or roughly shaped. Despite vast opportunities, there remain difficult challenges confronting Myanmar's gem and jewelry industry in its transformation into a foreign exchange generator. The value added in Myanmar of those products is very limited. In addition, there is currently no explicit policy for export promotion of manufactured jewelry products and no incentives for export of jewelry. Until recently Myanmar's resources were largely closed to foreign investors, but the situation has changed rapidly over the last couple of years, with several far-reaching reforms of the sector –like Myanmar voluntary participation in the Extractive Industries Transparency Initiative (EITI) aimed at attracting investment, and increasing government revenues in a more transparent way.</p>		<p>The approach is multifold, and involves acting on the legal and institutional infrastructure, skills development and export capacity. To increase value added activities in the gem and jewelry industry requires building capacity in manufactured exports through strengthening in the various stages raw materials procurement, investment, research and development and human resource development. Consorted efforts by all ministries to nurture the gem and jewelry industry as a strategic export sector is critical for the success of sector development. Simultaneously, public-private cooperation and communication in policy decision-making are necessary. The proposed actions will contribute to improve transparency in production and trade by setting a clear vision, goals and measures for the gem and jewelry industry.</p>		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
160. Establish Gem & Jewelry Promotion Act: Enact Gems and Jewelry Promotion act as a legal basis to support promotion of gem and jewelry industry	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	No
161. Strengthen public-private cooperation for export promotion to improve the efficiency of government policy regarding the gem and jewelry industry	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No

162. Strengthen export incentives to create a value-added based gem and jewelry industry, building value chains from gemstone cutting, through jewelry setting, to export is important.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	No
163. Support export marketing for overseas gem and jewelry marketing by SMEs, including participation in international exhibitions, should be strategically promoted by Gem and Jewelry Government Regulatory Body.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
164. Build on-line market platform that specifically selling Jade products on the Chinese market and build a system of on-line settlement and shipping to support international transactions including insurance and legal documentation requirements	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
165. Enhance capacity of designers to be competitive in the jewellery market, attracting creative and designers to be well aware of global market trends	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
<u>Long Term Actions:</u>				
166. Establish the Gem & Jewellery Export Promotion Council and Jewellery Industrial Development Committee to effectively cope with various difficulties faces by exporters in the long-run, a high-level public-private coordination mechanism.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
167. Support brand development	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
168. Establish design centres to provide a favorable environment that encourages future designers and support creative design commercialization and protecting intellectual rights of designers.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
169. Establish education and training institutes to get skilled labor through a network of vocational schools, specialized training institutes, colleges to supply skilled workers and organized curriculum	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
170. Host local campuses of global institutions to earn international recognition to train specialists in gem and jewelry to upgrade Myanmar's reputation in the global market	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MTBPTF:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	No
Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)				
<i>Project name:</i>	<i>Funded by:</i>			
Not available	Not available			

Cluster #	V.11			
MTP Pillar	Pillar V: Value Chain Development and Export Diversification			
Reform Area	Cluster V.11: Tourism Sector			
Cluster Objective	Seize revenue generation and inclusiveness opportunities presented by the tourism sector by promoting new products and destinations and remove key regulatory bottlenecks			
Contribution to Economic Policy Targets	#2, #4, #5, #6, #7, #12			
Challenges to be addressed		Proposed approach		
In spite of the recent growth of the sector, the contribution of tourism to Myanmar's economy is still relatively low compared with its regional neighbors. The total contribution of tourism to GDP and employment is the lowest in the region, as well as the investment in the subsector. This suggests that there is still substantial potential that remains untapped. Myanmar's tourism sector is facing important challenges that require strong inter-ministerial support. The main challenges to tourism services relate to infrastructure, in terms of air and ground transport, human resources, lack of destination visibility as well as in ICT availability. Other more tourism-specific restrictions to trade in tourism services include restrictions on homestays and guides, licensing challenges for hotels, in spite of the liberalization taking place in tourism sub-sectors		Importance of the tourism sector for development and priorities to tackle for a sustainable development of the tourism sectors are very well articulated in the Tourism Master Plan 2013-2020 developed by the Ministry of Hotels and Tourism. Emphasis must be given on services to tourists, attractiveness of the destination, tourism infrastructure and human resources development. Support to the Implementation the master plan will increase benefits for tourism actors. It can also be expected that the benefits of the surge in both regular tourism and border entries will have greater benefits for Myanmar's ethnic minorities, highlighting the needs to focus tourism development in ethnic areas near these key border crossings. Targeted actions are needed to remove trade in tourism services constraints.		
Actions to be undertaken		Resource Requirements		
Short to Medium Term Actions:				
171. Accelerate implementation by MoHT of the six main strategic pillars of the Tourism Master Plan 2013-2020	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	Yes
172. Expand the utilization of e-visa system.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	No
173. Improve the dialogue between MoHT and tourism federations and	<u>Advocacy to Cabinet:</u>	<u>Advocacy to</u>	<u>Gov't funding:</u>	<u>Donor support</u>

associations, to include new issues and ways to promote sustainable development of the sector		<u>MSTFBTP:</u>		
	No	Yes	Yes	No
174. Establish a weekly magazine to advertise cultural events, entertainment, dining and outings, with both electronic (web-based) and paper formats in English language for tourists and locals (along the lines of 'Time Out') in major destinations (Yangon, Mandalay, Bagan).	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	No	Yes	Yes
175. Organize an awareness-raising campaign at the national and state levels to sensitize authorities (government, police) and tourism professionals on the economic importance of tourism, and the benefits in terms of positive image-building, through training workshops, press advertisements and media spots	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
176. Strengthen vocational training programmes in technical schools and training centres, in partnership with the private sector, to provide internships and to facilitate access to the tourism job market and improve the skills of young graduates	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	Yes
177. Align and harmonize rules and regulations on tourism and related standards between Union and State governments to allow development of new tourism products (ecotourism, adventure, homestay, etc.)	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	Yes	Yes	No
178. Review licence process for hotels and establish coordination on policies and infrastructure in certain destinations	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	No	Yes	Yes	No
<u>Long Term Actions:</u>				
179. Assist with the development of a branding strategy for the tourism sector based around the vision statement 'Charming Myanmar', including More marketing and promotion on existing Nation Branding "Myanmar: Let the Journey Begin", developing messages, marketing material and communication channels and Training of tourism professionals about implementation of the branding strategy and benefits for the Myanmar tourism sector.	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	Yes
180. Focus tourism development in ethnic areas near these key border crossings so cater for the high volumes of tourists coming into Myanmar through land borders	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>

	Yes	No	Yes	No
181. Build the human and IT capacity of Myanmar immigration services in data collection about travellers' arrivals and profiles for commercial purposes	<u>Advocacy to Cabinet:</u>	<u>Advocacy to MSTFBTP:</u>	<u>Gov't funding:</u>	<u>Donor support</u>
	Yes	No	Yes	No

Current ODA programs (source: mohinga.info, NES Implementation Progress Report 2016)

Project name:	Funded by:
Business Innovation Facilities (BIF)	DFID
Development for Human Resources in the Hotels and Tourism Sectors and Capacity Development of the Ministry of Hotel and Tourism	Grand Duchy of Luxembourg
Hotel Training Initiatives	Swiss Agency for Development and Cooperation SDC
NTF III Myanmar – Inclusive Tourism Focusing on Kayah State	Government of the Netherlands (through CBI)
Sustainable Tourism Development Project Myanmar 2014-2017	Government of the Netherlands (through CBI)
Supporting Tourism in Myanmar through Business Management Training	SECO – Switzerland
Initiative for ASEAN Integration (IAI)	GIZ
Supporting Tourism in Myanmar through Business Management Training	ILO
MYANTRADE Master Plan	KOICA
Capacity Development on Trade Promotion Project	JICA

MONITORING & EVALUATION FRAMEWORK

The M&E framework presented herein is intended to serve as a rolling index for tracking the completion of the 23 MTP clusters actions.

The MTP complements these seven key trade development documents' action plans and consequently its M&E structure is aligned with the corresponding M&E mechanisms of these documents (when available). As each document used different categories for measuring progress, the M&E framework used here used most frequent M&E criteria (see description below). In doing so it is envisaged that the M&E framework below assumes that activities in the MTP will be carried out by agencies already identified as the most directly relevant to that particular task, and measured against identified targets.

A reporting system will be established within the MTP implementation mechanism described earlier to allow for direct reporting on activity progress on a regular basis, depending on the type of activity in question. The ACU will then use this M&E framework to record and monitor each activity's progress accordingly.

The responsibility to project-level coordination for each cluster will fall to the working group established under the proposed MTP implementation mechanism (see section "Implementation Mechanism" above):

Reporting by the sub-committees to the ACU will take place in parallel to systems already established by the *MSTFBTP* or *MSTFBTP*

Given the wide range of recommendations in the MTP, an all-encompassing M&E system must be flexible. The MTP includes many straightforward interventions which already have some degree of existing momentum towards completion (i.e. on Trade Facilitation and Customs Reforms).

For other more long-term recommendations, existing donor projects already have existing M&E frameworks which can be utilized for the benefit of the MTP.

As a starting point, the M&E Framework below is based on the 23 clusters previously described in the Resource Mapping section. For each activity, the following dimensions are covered:

1. **Agreed-upon activity**, per the seven trade documents used to populate the MTP
2. **Baseline information**, for those activities where comparison to the current status quo will determine whether an activity is successful
3. **The specific targeted outcome** which will satisfy the performance requirement for each activity;
4. **Sources/Means of verification**, some of which will be qualitative while other activities will be quantitative.
5. **Responsible agencies**, either government, private sector, or combination
6. **The activity timeframe**, aimed at balancing the need for timely tracking by ACU.

Short-term priorities (1-2 years) appear with a green-shaded background while medium to long term priorities appear with a blue-shaded background.

It is intended that the M&E framework be revised on a yearly basis as a minimum.

Cluster I.1: Institutional Reforms

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Design and implement a thorough reshaping of MoC and trade-related institutions organizational capabilities to respond effectively to the needs of reforms</i>						
1	Carry out a thorough Capacity Needs Assessment (CNA) leading to the adoption of a reform and capacity development plan for the trade-relevant departments and agencies. This includes a review of incentives, mandate organizational structure of trade-relevant departments	New Government recently appointed with institutional reforms on-going	Revised institutional structure of MoC implemented, in line with regional and international obligations	MoC Organogram	MoC	2017
2	Develop a massive urgent training programme for managers, officials and staff in trade-relevant departments, on the basis of renewed job-description and capacity gaps. The training programme will be used as an integral part of career development plans in public service	Training for MoC officials organized on ad-hoc basis, DPs dependent	Annual training programme implemented	Annual training plan, including Government contribution	MoC	2017
3	Review and strengthen the trade related national institutional arrangements (NIA) under the newly-created Myanmar Special Task Force for Business and Trade Promotion, by revamping the role of the MSTFBTP and trade-related working groups (NES, NTFC, etc.) under it and streamlining functioning and reporting mechanisms	Myanmar Special Task Force for Business and Trade Promotion (MSTFBTP)	Each WG under has clear membership and ToR	Official order published	MoC	2017
4	Build capacity of Myanmar trade attachés and counsellors	Myanmar has an extensive yet costly network of embassies but very little knowledge and information on trade and business opportunities are available	All trade attachés receive trade and business promotion training and materials before overseas posting	Myanmar embassies, MoC TRI curriculum	MoC, Myanmar embassies and missions abroad, business associations	2017
5	Assess potential of streamlining key paper-based trade processes (business registration, certificate of origins, IPR registration, etc.) to an ICT-based through a step-by-step automation process	No trade related process in MoC is automated	MoC ICT Master Plan formulated	Master Plan	MoC	2018

6	Develop a government ICT system and database to improve sharing of information on trade and investment and coordination	No ICT connection or integrated on-line procedures among ministries	Government-wide ICT master plan formulated	Master Plan		2020
7	Capacity building for government departments and think tank organizations on data and policy analysis, safeguard measures	Economic and trade data compiled but not analyzed and seldom used for policy making and analysis	Policy making based on sound data analysis and research	Workshops, trade data analysis in policy documents	MoC, CSO, Ministry of Planning & Finance (MoPF)	2021
8	Develop legal capacity and legal functions within Union Government ministries by placing lawyers across key ministries and providing training programme on trade obligations and on the relation between regional legislation/regulation, domestic legislation/regulation and trade	Weak legal drafting and reviewing capacity in line ministry leading poor business and trade-related legal texts	Legal department equipped with legal expertise	Quality of trade and business related legal drafting has improved and is in line with international standards and practices	Ministry of Justice, Ministry of Commerce	2021

Cluster I.2 Regulatory Framework and Transparency

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Enhance the country's regulatory framework by increasing transparency, access to information and addressing legal and regulatory bottlenecks</i>						
9	Training on (1) the identification, collection, classification and notification of NTMs and (2) impact of Rules of Origins on Myanmar's trade	Limited training has been provided to comply with ATIGA commitments	All the identified target group has been trained	List of trainees and training report	MoC	2017
10	Formulate a comprehensive Myanmar Trade Law	Several trade-related laws have been coexisting and, for some, are outdated	Law is passed by Parliament	Law enacted	MoC	2018
11	Clarify regulatory processes and rules to enable businesses to comply, reduce regulatory discretion, and promote fair competition	The current regulatory approach focuses heavily on licensing market entry, imposing restrictions on service providers and foreign investment	Regulatory rules and processes are published, easily accessible and have become business-friendly	Ease of Doing Business Report (WB)	DICA, MoC, MoPF	2018
12	Equip Myanmar with an adequate toolbox of WTO-consistent trade policy instruments (trade defences i.e. safeguard, countervailing, etc.).	Over reliance on licensing and other barriers to trade not in line with international (WTO) practices	Enhanced capacity to properly implement WTO safeguard clause for trade remedies, decoupling licenses from trade concerns	List of goods subject to licensing requirements	MoC, Customs	2018
13	Assign NTM committee (NTMC, possible merged with the National TF Committee) to review whether selected NTMs have clear objectives around protecting safety, social norm, environment, and public health and procedures	Reform in trade licenses and certificates is underway but not completed	Impact of each NTM is analyzed and documented	MoC, NTMC	MoC, FDA	2019
14	Accelerate the reform of the licensing system by reviewing the remaining non-automatic licenses, exercise more liberalizations, give Yangon office more autonomy and decision making power for license issuing and establish an online database of license requirements, searchable by HS-code.	MoC introduced long list of products that are subject to automatic licenses vs. non-automatic licenses	No or automatic licensing become the rule, and non-automatic licensing the exception, limited to sensitive products, in line with WTO and ASEAN commitments	Number of non-automatic licensing / products for which non-automatic licenses applied	MoC	2019

15	Remove unnecessary procedures and practices through consultations with stakeholders (e.g. advance income tax for export, restrictions for foreign companies to import)	Several obsolete procedures prevent business development especially for SMEs	Procedures in line with regional and international practices	Legislation enacted	MoC	2019
16	Set up Trade Portal and amend legislation to require trade-related departments report NTMs + procedural information	No single platform with updated information on NTMs including permits & Customs procedures	Fully operational trade portal, compiling information on rules, regulations and procedures for export, import, customs and port clearance	Trade portal accessible online, exhaustive NTM inventory	MoC, NTMC	2019
17	Ensure transparent rules, systematic and predictable enforcement, and minimize regulatory discretion in trade and investment	The current dual regimes for foreign and domestic investment are not conducive to investment	Adoption and implementation the Investment Law provide a level playing field for investors, ensure adequate investor protections and provide mechanisms for the settlement of disputes between investors and the government	Ease of Doing Business Report (WB)	DICA, MoC, MoPF	2020

Cluster I.3: Trade in Goods

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Accelerate the implementation of commitments made under ASEAN and WTO on trade in goods to benefit from accrued market access, simplified tariff structure and increased transparency</i>						
18	Capacity-building on recording and classifying trade data on HS-system and consolidation of data for normal and border trade and in SEZs	Lack or inconsistent foreign trade data and statistics	Reliable trade data regularly published in UN Comtrade for informed trade-policy making	UN Comtrade, MoC, Central Statistical Organization (CSO)	CSO, MoC, Customs, MoTC	On-going
19	Training on negotiation techniques with respect to international trade agreements, coaching negotiators to further engage in FTA negotiations (e.g. RCEPT) and build capacity in trade negotiation	Few active trained negotiators and knowledge/skills not adequate or up-to-date	Myanmar can count on a team of trained negotiators to extract better deals from on-going negotiations	RCEP and other FTA commitments	Customs, MoC, MoPF	2017
20	Training on ASEAN Rules Of Origins (RoO) and review process	Low understanding of benefit of using ASEAN RoO / form D for intra-ASEAN trade	Increased use of RoO by exporters	Number of form D issued on annual basis	MoC, FDA, LBVD	2017
21	Publish clear guidelines on trade and customs procedures/regulations on the ASEAN National Trade Repository	Access to information is cumbersome, spread among agencies and information is partial or not available in English	The ASEAN National Trade Repository contains information on all Myanmar trade-related procedures and legal documents	ASEAN NTR website up-to-date, number of hits	Customs, MoC, MoPF	2018
22	Streamline and simplify Myanmar's tariff structure to reduce trade "nuisance"	Myanmar has thousands of tariff rates, creating an unnecessary monitoring burden for Customs	Streamlined tariff structure with minimum number of rates	Tariff schedule, WTO notifications	Customs, MoC, MoPF	2018
23	Reconcile fully the ASEAN Harmonized Tariff Nomenclature (AHTN) 2007 and AHTN 2012, as well as with respect to the implementation of Myanmar's licensing system;	Discrepancy in data in ATHN 2012 version used by Myanmar	HS code used by officials traders based on fully aligned AHTN 2012 version	Central Statistical Organization (CSO)	MoC, MoPF	2018
24	Develop a searchable database on the trade repository for duties/commercial taxes by HS code	Information on HS code not easily available for traders leading to discrepancies in declarations	Fully functional, user friendly database provide information on tariff applicable for each product specified	Link to database on NTR website	Customs, MoPF	2018

25	Accelerate implementation of Myanmar's ATR/NTP/NTR obligations under the ATIGA in line with the recently conducted ATIGA Gaps Assessment	NTR and NTP are being developed but not implemented and development is constrained by budgetary and human capacity constraints	Myanmar's obligations under ASEAN agreements fulfilled	Notifications and AEC scorecard	Customs, MoC, MoPF	2019
26	Improve certificates of origin issuance procedure, in particular for form-D for Myanmar's exporters to utilize preferential tariffs in ASEAN, including the possibility and associated steps to fully automatize the process	Low utilization of ASEAN's Form D	Form D use increase 5 fold over the review period	Trade date on use of ASEAN RoO	MoC, DOA, DOF, LBVD	2019

Cluster I.4: Trade in Services

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Accelerate the contribution of trade in services to the economy in line with sub-sector potential</i>						
27	Deliver training on negotiation techniques with respect to international trade agreements. Coach and monitor Myanmar's participation in FTA negotiations and build capacity in trade in services negotiation	Myanmar negotiators used defensive and reactive approaches for lack of negotiations experience and methodology	Myanmar negotiators extract better deals out of future FTA negotiations	FTAs schedule of commitments	MoC, MoTC, MoPF	2018
28	Support Myanmar participation in ATISA, RCEP and other FTA negotiations and increase convergence among commitments made under different fora	No RIA or impact assessment on services sector and sub-sector liberalization	Myanmar negotiators extract better deals in AFAS 10 and favorable terms in RCEP and ATISA	AFAS 10 and ATISA schedule of commitments	MoC, MoTC, MoPF	2018
29	Improve public-private dialogue on services trade, in particular as regards regulatory frameworks	Public-Private dialogue on services is limited and not aligned with the country's current priorities	PPD mechanisms are structured with a lead agency for services issues	Composition of PPD WG, agenda and minutes of WG meetings	MoC, MoTC, MoPF	2018
30	Redesign institutional framework for coordination and oversight in service trade to one "non-service" ministry and align mandates of other sectoral departments. This could possibly lead to the creation of a Trade in Services department under the DoT and the shifting of responsibility under ASEAN AFAS to MoC.	Responsibility on services scattered among different ministries, with limited capacity for coordination and policy making	One single MoC department responsible for Trade services, including responsibility for ASEAN, WTO and FTA	MoC and departments conducting trade in services negotiations.	MoC, MoPF, CBM, MoTC, MoHT, MLIP	2019
31	Carry-out service regulatory reviews and reform regulations, using RASTI and other tools available, to be used in the preparation to AFAS 10, ATISA and RCEP negotiations	Limited information in gaps in regulation and practices.	Regulatory reviews available for key services sectors	Publication of new texts on services portal	DICA, MoC	2019
32	Establish services portal	Numerous regulatory obstacles faced by SMEs for lack of relevant information in one single place	Clearer regulatory processes for each services sector	Services portal	DICA, MoC, MoTC, MoPF	2021

Cluster II.1: Trade Facilitation

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Improve and simplify border procedures with a view to align trade facilitation in Myanmar with international best practices</i>						
33	Establish a National Trade Facilitation Committee, including private sector participants, to oversee implementation of the WTO Trade Facilitation Agreement, Cross Border Trade Facilitation Agreement, and cargo clearance procedures	Irregular coordination across trade-related departments for reforms in cargo clearance and trade logistics	The NTFC is up and running, reporting to the Myanmar MSTFBTP	Relevant Ministerial Decree / Regular NTFC meeting minutes	MoC, MoPF, Customs	2017
34	Provide training to staff at government institutions involved in customs and trade facilitation on the use of basic office software, in order to raise the ICT skills.	ICT and automation literacy among government institutions is at infancy stage	Increased processing of trade-related documents, increase automation.	Doing Business Report	Customs, MoC, MoI, MoPF	2018
35	Establish a simple compliance programme as a precursor to an AEO scheme	Myanmar has not established an AEO programme (ATIGA)	Compliance programme is in place in order to promote compliance with and greater efficiency of customs controls, and to work towards mutual recognition of AEOs among the AMS	Programme details, partnership with other AEO	Customs, MoPF	2018
36	Improve processes for customs clearance and inspections by accelerating implementation of WTO Customs Valuation Agreement, increasing use of ICT in Customs Procedures	Cumbersome processes for customs clearance and inspections	Time and costs associated with custom procedures at border points drastically reduced	LPI, Transit time, Clearance time	MoPF, Customs, MPA	2019
37	Review existing Customs and other trade-related department legislation and assisting in writing a new National Customs Code.	Existing Customs and other trade department legislations are old and requires constant amendments to address new technologies and processes.	Improved efficiency in border management in line with international commitments	Existing Legislation Review	Customs, MoPF	2019
38	Strengthen border and inland enforcement to decrease the 'grey market' trade (goods imported without paying proper duties)	Lack of capacity and information at border points leading to revenue loss by improper taxation	Increased efficiency in application of custom tariffs	Customs data (on grey market trade)	Customs, MoPF	2019

39	Develop risk management capacity of customs and related agency staff to ensure consistency and predictability in enforcement of customs and trade regulations	Low/lack of risk management capacity of customs officials	Risk management system implementation accelerate goods clearance at border points	Customs data (use of different channels at border crossing)	Customs, MoPF	2020
40	Connect the customs and tax databases to reduce the administrative costs of businesses	No compatibility or connection among different ministries databases	Traders can access one single database for trade-related information, processes	National Single Window	Customs, MoPF, MoC, Mol	2020

Cluster II.2: Trade Facilitation Agreement (WTO TFA)

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Implement WTO TFA fully using on-going reforms and the Myanmar's schedule of commitments ("categorization of articles")</i>						
41	A4.1 Right to Appeal or Review A5.2 Detention A6.2 Specific Disciplines on Fees and Charges Imposed on or in Connection with Importation and Exportation A7.3 Separation of Release from Final Determination of Customs Duties, Taxes, Fees and Charges A9 Movement of Goods under customs control intended for import A10.5 Pre-shipment Inspection A10.6 Use of Customs Brokers A10.7 Common Border Procedures and Uniform Documentation Requirement A10.8 Rejected Goods A10.9 Temporary Admission of Goods/Inward and Outward Processing A11.4 Transit Strengthened Non-Discrimination A11.11-15 Transit Guarantees A11.16-17 Transit Cooperation and Coordination A11.5-10 Transit Procedures and Controls A2.1 Opportunity to Comment and information before Entry into force A2.2 Consultations A6.1 General Disciplines on Fees and Charges Imposed on or in Connection with Importation and Exportation A6.2 Penalty Disciplines A23.2 National Committee on Trade Facilitation A7.8 Expedited Shipments	n/a	As per TFA categorization	Notification to WTO	Customs	As per TFA categorization

42	A1.1 Publication A1.2 Information available Through Internet A1.3 Enquiry Points A3.1 Advance Rulings A7.1 Pre-arrival processing A7.6 Establishment and Publication of Average Release Times A7.9 Perishable goods A8 Border Agency Cooperation A10.1 Formalities and Documentation Requirements A10.2 Acceptance of Copies A10.3 Use of International Standards A12 Customs cooperation A11.1-3 Transit Charges, Regulations, and Formalities A5.1 Notifications for enhanced controls or inspections A5.3 Test Procedures A7.2 Electronic Payment A7.4 Risk Management A7.5 Post-Clearance Audit A7.7 Trade Facilitation Measures for Authorized Operators A10.4 Ingle Window A1.4 Notification	n/a	As per TFA categorization	Notification to WTO	Customs	As per TFA categorization
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Cluster II.3: Transport Infrastructure and Logistics

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Promote the simultaneous development of hard and soft transport infrastructure linking it with local economic development potential</i>						
43	Review practices in in-land border trade, and invest in infrastructures at border check points	Underdeveloped infrastructure in border check points	Decreased clearance time for inland cross border trade	Cross-border trade data	MoC, MoTC	2018
44	Develop a fee-based vocational training program to strengthen the capacity of freight forwarders and customs brokers in logistics, documentation, cargo handling, insurance, and transport management issues, including multi-modal.	Logistics services offer under developed, with focus on road and sea transport	Development of an intermodal supply chain for freight transport in line and adherence with international conventions	Logistics services offer by freight forwarders	MoTC, MIFFA, MMDA, MCBA	2018
45	Expand the use and stimulate the development of bonded warehouses through the identification of suitable locations at and near ports, airports, industrial zones, and special economic areas. Ensure that all bonded warehouses are equipped with modern ICT, EDI and inventory management capabilities.	High demand and interest for private logistics park and bonded warehouses outside port but no solutions available yet	Cargo consolidation outside ports, Improved competitiveness for export-processing activities	# of private bonded warehouses with on-site inspections	Customs, MBF, MoCST	2018
46	Increase amount of public land used for container yards, allowing more companies to operate, increasing competition and reducing costs.	Continued congestion in Yangon ports for lack of dedicated container handling/storage facilities	Public land and leasing mechanisms have been identified for container yard development	Public land surface used for container storage/handling	MPA, MoTC, MoPF, MoCST	2018
47	Update air and marine regulations so that they are consistent with international standards	Current air and marine regulations are obsolete and not in line with international best practices	Regulatory and oversight framework amended, in line with international standards	Legislation/regulations enacted, international treaties ratified	MoTC	2019
48	Update inland water, rail and road transport regulations in order to improve quality of service	Current regulations are obsolete and not in line with international best practices	Regulatory and oversight framework amended, in line with international standards	Legislation/regulations enacted, international treaties ratified	MoTC	2019
49	Upgrade night navigation in Yangon river to allow ship to call ports past midnight and review tariff structure to increase container turn-around	Low berth utilization at port and congestion at port gates	Increased TEU/hour and berth utilization by 10%/year	Container throughput	MPA	2019

50	Establish a Multimodal Transport Master Plan to plan and coordinate transport infrastructure development in the country in the long run (5–10 years).	Transport modes are being developed under separate schemes, with little/no plan for logistics and multimodal transport	Transport master plan produced and approved	WB Logistics Performance Index (LPI), Public Investment Plan	MoTC, MPA, MoC, MIFFA, MMDA, MCBA	2020
51	Conduct feasibility study with PPP options for investment in logistics park and inland container depot	Limited inland logistics infrastructure and facilities	PPP scenario and opportunities are documented	Studies	MoTC, MoCST, Customs, Regional Governments	2020
52	Improve Yangon-Mandalay Expressway to allow containerized trucks	Trucks carrying containers are not permitted to use the National Expressway	Regulations and technical limitations for containerized trucks on National Expressway are implemented	Corridor Assessment Study	MoC, MoTC, MoCST	2021
53	Review constraints for development of quality logistics services and remove constraints through dedicated technical assistance actions	Underdeveloped logistics services	Key logistics constraints identified and documented	WB Logistics Performance Index (LPI)	MoTC, MoCST, FF and Logistics associations	2021

Cluster III.1: Quality Infrastructure (excluding SPS)

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Ensure that Myanmar's future quality infrastructure meets both service provision and trade facilitation needs</i>						
54	Review current progress with respect to standards, technical regulations and conformity assessment procedures, so as to take stock of specific areas in which efforts have yet to start	Underdeveloped SPS/TBT regulations for technical regulation and quality infrastructure	The standards and quality infrastructure ecosystem is documented and a road map is developed	Proposed laws and regulations including framework for technical regulations	DNSQ	On-going
55	Support to public and accredited private laboratories, establish new laboratories to test physical analysis, phytosanitary and fumigation, chemical residues, food quality testing	Limited capacity in existing laboratory for testing (conformity assessment)		# of supported and upgraded laboratories	MoALI, MoC, DNSQ, FDA,	On-going
56	Implement the roadmap to establish the Myanmar accreditation body agreed between the Accreditation Division from National Standards and Quality Department under the Department of Research and Innovation, UNIDO and PTB	Roadmap exist but not yet implemented leading to limited accreditation options	The roadmap has been implemented	Myanmar Accreditation Body established	NSQD	2017 (on-going)
57	Develop a national repository of all mandatory/voluntary standards	Information on existing standards is patchy and difficult to obtain	Public and private standards are documented and easily accessible through NTR or similar platform	National Repository (or subset of NTR)	DNSQ, MoPF, MoC	2017
58	Implement a pilot project to link selected labs together to conduct collective training sessions, proficiency tests and joint tests. Capitalize on existing experience to proceed to inter-laboratory joint measures testing.	Lack of cooperation among labs on testing measures and standards	A memorandum of understanding between the various labs to formalize working arrangements is established	MoU establishing partnership	MSTRD	2018
59	Enable a specific committee, such as the TBT or SPS national committees or the NTM national committee, to act as a formal public and private dialogue forum to ensure coordination and cooperation in the QM function.	No single PPD mechanism/forum to discuss quality management issues and development	Committee recognized by decree to be the official public-private dialogue forum	Decree	MSTRD, UMFCCI	2018

60	Increase regional and international collaboration with NSBs to align Myanmar standards to regional and international ones (already in 5 year plan and budget plan).	Very limited cooperation with AMS or other NSB limit access to up-to-date information and best practices	Cooperation agreements established and signed with NSBs	New standards aligned to international requirements	MSTRD (Standards Committee)	2019
61	Ensure regular testing of accredited trainers, auditors and inspectors to ensure adequacy of trainings and inspections in line with international best practice.	Technicians and inspectors not up-to-date on QM international best practices	All accredited QM technicians and inspectors tested	Annual report / database of accredited technicians and inspectors	MSTRD, MoC, MoALI, MoLFRD, MoH	2019
62	Establish a central database, managed and maintained jointly between QM institutions, for the collection, storage and dissemination of technical market requirements	No centralized and easily accessible information on technical market requirements	Database established and regularly updated	User-friendly database	MSTRD, MoC, MoALI, MoLFRD, MoH	2019
63	Assess demand for standards and quality infrastructure through value chain studies and targeted capacity building program for government quality infrastructure and other methodologies. Initiatives can be built by refining existing studies to ensure that they are tuned into demand. Increase awareness of and capacity of applying good practice on technical regulation and quality infrastructure	Very low demand for quality infrastructure	Value chain studies are for key targeted products are disseminated to increase awareness on standards and quality infrastructure	Policy note, workshop reports	DNSQ	2020

Cluster III.2: Sanitary and Phytosanitary Measures (SPS)

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Upgrade Myanmar's SPS ecosystem in line with international standards to meet suppliers' demand for SPS certification</i>						
64	Update its list of SPS Contact Points in Annex 10 of the ATIGA and ensure the SPS notification system is functioning	Gap exist in terms of Myanmar's implementation obligations under Article 82 of the ATIGA, both in terms of SPS contact points and notification system	Myanmar's list of contact points is accurate and complete, the SPS notification system is optimized and streamlined	ASEAN Secretariat SPS contact point list for Myanmar	MoC and SPS contact points	2017
65	Establish guidelines for SPS management according to international practices	Myanmar has weak SPS capacity limiting access to attractive market segments for its exports and weak SPS capacity to ensure safety of imports.	Guidelines and mechanisms for SPS planning, coordination and management are established, in line with international practices	SPS Management Guidelines and Action Plans published	MSTRD, MoH, MoC	2018
66	Plan upgrading laboratories and laboratory policies in order to develop more SPS laboratories	The workload of the laboratories is very low and not sufficient for building sustainable laboratories	A national laboratory development plan in coordination with all agencies involved has been developed	National laboratory development plan	MoALI, MoH	2018
67	Develop and implement an arrangement for the control and eradication of diseases and pests, in line with Article 6 of the WTO SPS Agreement;	No regulation developed on the control and eradication of diseases and the establishment of disease free-zones,	Regulations pertaining to the control and eradication of diseases and pests, in line with Article 6 of the WTO SPS Agreement and Articles 79 and 85 of the ATIGA have been enacted	Notification to ASEAN Secretariat	MSTRD, MoH	2019
68	Conduct plant pest surveillance	Diagnostic testing for plant pests and diseases is far below desirable levels for export crops	Annual target of 4-6 crop pest surveys for export crops and 2 pest surveys for important pests would be desirable	Annual SPS Management Report by PPD	MoALI, Plant Protection Division (PPD), MoH	2019
69	Conduct food safety surveillance	Myanmar has no active and passive surveillance and databases of food-borne and animal-borne diseases	Build active and passive food safety surveillance with basic testing capacity for low and moderately demanding market segments	PPD surveillance report	MoALI, Plant Protection Division (PPD), FDA, MoH	2019
70	Upgrade university SPS curricula plant and animal products	Current SPS curricula are not aligned with countries SPS priorities	Curricula are updated to focus on food safety for primary products and emphasis on export policy	University curricula	MoE, MoALI, MoH	2020

Cluster IV.1: SME Development

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Enhance the role of SME in local, sub-national and regional development by providing a stable, predictable and inclusive environment for the private sector to prosper</i>						
71	Pass a new investment law, company registration and consider having negative list to limit discretion of line departments to restrict investment via ad-hoc decision	Current investment law outdated, not pro-business or pro-trade	A new pro-business investment law enables freer trade	Legislation enacted	DICA	On-going
72	Build trade association capacity to market collectively, including associations with predominantly women members	Weak cooperation among business associations, in particular at regional levels	Joint activities and missions by trade associations are conducted on an annual basis	Joint overseas mission	UMFCCI, individual trade associations / sector	2017
73	Develop and launch a comprehensive regulatory reform program to improve the quality of Myanmar's business environment	Gaps in regulation and practices, diverse regulatory obstacles faced by small service providers licensed at MIC and DICA	A thorough assessment of regulatory gaps and corresponding reform is produced to facilitate the expansion of small service provider activity	Regulatory program endorsed	DICA	2017
74	Reconsider the requirements for SME to settle advance income tax and consequently the responsibility to collect income tax through the customs process	Requirements to settle advance income tax are severely affecting SME cash-flows, as the tax deduction process can only be done once a year.	Reduced trade costs for SME	Decree	MoC, MoPF	2017
75	Create incentives to encourage foreign firms to transfer skills to their Myanmar partners	Lack of skill transfer programmes and training capacity in foreign firms, few Myanmar nationals in supervisory and middle management positions in key industries.	Increased knowledge and skills gains on modern business practices for Myanmar business	Training programmes offered by foreign business associations	UMFCCI, Domestic and Foreign Business associations	2017

76	Document structural barriers faced by women in setting up businesses	Opportunities open to women in terms of employment are far more limited and women-led enterprises face niche barriers to trade development	Carry out a comprehensive study on constraints affecting women workers in agribusiness, light manufacturing and tourism; discrimination against, or impediments faced by, women-led businesses, options for gender-sensitive trade facilitation for border trade	Study is released and disseminated	MLIP	2017
77	Make it easier for overseas Myanmar men and women to start or invest in local businesses in addition/substitute to remittances	Support by Myanmar diaspora to economic development is constrained by lack of support actions and incentives	Dedicated facilities and incentive developed for Myanmar diaspora willing to invest in business development	Businesses created by returning Myanmar nationals	MLIP, DICA, Foreign Business Associations in Myanmar	2018
78	Support to automation of key trade processes	Most trade-related process are paper-based adding costs of doing business for SMEs	Plans for automation of basic trade processes critical for SMEs (licensing, registration, C/O) have been developed	Online business processes / platforms	MoC	2019
79	Improve enforcement of tax laws to encourage business formalization and decrease the size of the informal economy	A large part of businesses in key sectors are informal, creating unhealthy competition and limiting tax revenue	A programme aims at increasing tax revenue from businesses is implemented nationwide	Tax revenues from formal businesses, % of formal businesses, especially at regional levels	MoPF, state administration	2020
80	Enhance industrial development	Limited capacity and access to opportunities among SMEs with export Potential in priority sectors	Elaborate a broad-based industrial policy in light manufacturing, starting with garment, agribusiness and tourism	Policy document and implementation regulations	MoC, MOI	2021

Cluster IV.2: Access to Trade Finance

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Improve access to finance for SMEs and upgrade enabling framework and regulations for trade finance</i>						
81	Improve exporter knowledge of available financing, how to qualify for it and how to use it	Access to credit and other available financial services for SMEs limited by poor accounting practices and lack of information	Provide training to SMEs in priority sectors on L/C, basic financial services on keeping records and producing reliable financial statements	Number of training organized on trade finances, finance instruments by relevant business associations	UMFCCI, MBA, Myanmar Institute of Certified Public Accountants, MoC, financial institutions	2018
82	Level the playing field between local and foreign firms by allowing local firms to use foreign banks	Newly licensed foreign banks are confined to offering financial services, including trade finance, to foreign companies, joint ventures and domestic banks, not directly to local firms	A robust set of competing commercial banks—both local and foreign-owned—offers a wide variety of financial products to a broad spectrum of customers including local SMEs.	Banking regulations for foreign-owned banks	MoPF, DICA	2019
83	Review of legislations and practices for banks to facilitate trade finance instruments at market prices	Very limited trade finance products proposed by commercial banks	Number of instruments used by traders have increased 5 fold over review period	Number of L/C processed, receivable financing offered by domestic banks	CBM	2019
84	Adopt a law establishing a national Export-Import Bank dedicated to strengthening Myanmar' Participation in international Trade and	No dedicated bank to support SMEs participation in international trade	The EXIM Bank Law has been passed in cooperation with MoC and CBM	Law enacted	CBM, MoPF, MoC	2019

Cluster IV.3: Access to Trade Information

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Improve access to and provision of up-to-date, customized and user friendly trade information</i>						
85	Organize training workshops for TSI representatives on data collection and data processing	Traders are gaining access to trade data but are not equipped for processing and controlling quality and relevance of data	TSI are able to offer training services on data collection, processing relevance, quality and reliability of the information, methodology etc.).	Training on Trade Information organized with / by MoC	MoC, UMFCFI, TSI	2017
86	Ensure trade attachés posted in overseas missions and embassies have knowledge and information on trade and investment opportunities.	Little information on Myanmar trade and investment opportunities are available in Myanmar embassies	Trade attachés and counsellors receive training and trade-related information (paper and online) before entering in new position	Trade-related information available in Myanmar overseas embassies and missions	MoC, MoFA, Myanmar embassies and missions, UFMCCI	2017
87	Improve intelligence on third market requirements for current and potential exporters	SMEs lack access to market intelligence before venturing into export markets	A strategy to improve the availability of information on third market requirements for exports, from information collection to dissemination is developed	Strategy is endorsed and disseminated	MoC, UMFCFI, related ministries and commercial attachés	2017
88	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.	Trade Information Centres services are limited and do not cover all provinces	All Trade Information Centres are operational and provide information using different channels (possibly operating from MoC offices)	TICs catalogue of services / location	MoC, TSIs	2018
89	Acceleration the adoption of new business-related (companies law) laws and implementation of the recently enacted new business-related laws (Investment Law, Arbitration Law, Financial Institutions Law)	Some important dimension of business is still regulated by obsolete laws creating niche barriers for registration and operation of certain operators	Transparent laws are adopted and implemented to facilitate operation and access to stable trade information	Three key laws are enacted	DICA, MiC, MoC, UFMCCI	2018

90	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	Farmers, smallholders, processors have little access to public information on SPS, food health, animal health	Pertinent information is disseminated at district level using TSI and local associations, using different media channels	Media channels providing information at district levels	MoALI, Mol, Agrochemicals Association	2019
91	Invest in e-government to enable all agencies involved in administering trade to share information and offer their services to businesses through a national 'single window' & E-customs, with inputs and support from the private sector and development partners	Access to government-issued trade-related information for SMEs is seldom available on an online format	All agencies involved in administering trade share information and offer services to businesses through a national 'single window' & E-customs	National Single Windows, ASEAN Single Windows	MoC, MoPF, Mol, Customs	2019

Cluster V.1: Rice sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Create the conditions for a steady increase in quality and quantity of high quality rice exported formally to new markets</i>						
92	Accelerate implementation of SPS protocol with China for export of quality rice so as to improve SPS management for rice exports (following Cambodia model)	Myanmar and China agreed on a Memorandum of Understanding on the rice trade in 2015 but no implementation yet	SPS protocol signed with China that rice exported to China will be certified by an authorized Chinese company based in Myanmar.	Export of rice to China using SPS protocol	MoALI, Customs	2017
93	TA to abandon the Beale rice classification system of mixed rice variety and replace it with a system allowing rice to be sold for export by variety.	Myanmar is using an outdated rice classification for of mixed rice variety	The Beale rice classification is abandoned for exportable rice	Policy change, announcement on removal of Beale rice classification	MoALI	2018
94	Train Government officials on the methodologically sound production of rice sector statistics so that public and private stakeholders can make well-calculated investment and marketing decisions.	Myanmar has extremely low capacity 'to produce reliable and timely data even for the most basic statistics on rice production and exports	Officials at Central Statistical Organization and at each of the data collecting / reporting ministries trained on rice statistics data production and publication	Annual rice production and export statistics	CSO, MRF, MoALI	2018
95	Train small-scale millers in best practices, as a way of raising the country's overall rice quality	Poor milling techniques at village levels leads to breakage, contamination and poor rice quality	Systematic training programme or TA is available for pilot rice millers	Technical assistance programme provided through MRMA	MRF, MRMA Myanmar Rice Millers Association	2018
96	Targeted interventions in the rice value chain by to improve quality and yields from most farmers by using high-quality seeds, including a high percentage of hybrid seeds, greater numbers of distributors for fertilizer and pesticides, as well extension services to train farmers in their use.	The very few FDI in rice quality, efficiency and value chain operations limiting sector development	Investment opportunities portfolio for rice sector are prioritized in FDI	Presence of global rice sector players in Myanmar (seeds, fertilizers, machinery, animal feed)	DICA, MRF, MoALI and UMFCCI	2019
97	Access to higher-value markets thanks to the availability of organic certification and other international recognized quality certification developing the ability to consistently meet quality standards demanded by big buyers in higher-value markets	No internationally recognized organic certification	Myanmar organic rice is internationally recognized and accredited	Number of farmers certified as organic	MoALI, MRF, MoC	2020

98	Develop training solutions for mechanized farming across the major rice-producing regions of Sagaing, Ayeyarwady, Bago, Yangon, Rakhine and Mon	Farm mechanization and training for farmers is extremely limited	15 training centres for mechanized farming across the major rice-producing regions are opened	Number of farmers trained on an annual basis	MoALI, MRF, MAPCO	2020
99	Provide small farmers with model agreements, procurement assistance and technical training that will allow them to confidently purchase communal dryers and warehouses at the village level.	High level of losses of cultivated rice at village level for lack of available facilities (dryers, warehouses, etc)	Farmers in pilot villages have access to technical assistance to collectively buy facilities / lease them from providers	Decrease in losses of harvested rice	MoALI, MRF	2019

Cluster V.2: Beans, Pulses and Oilseeds sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Increase the value added in Myanmar in the beans, pulses and seeds sector by removing technical and logistics constraints and increased exports using formal channels</i>						
100	Organize more trade missions to selected target markets for business owners from the pulses, beans and oilseeds sector, with the help of UMFCCI and MoFA.	Market intelligence on new potential export markets is limited and not readily accessible	Targeted and concerted efforts from the industry to identify and explore new export markets	Market research / Mission reports	MOFA, UMFCCI	On-going
101	Develop new branding of pulse, bean and oilseed products	Limited use of sector promotion and limited knowledge of exporters concerning branding limits their capacity to project a positive and dynamic image of the sector's products	A branding strategy for the sector involving all the members of the revamped MPBSMA has been designed	Dissemination of the strategy with key business partners	MPBSMA, MoC, UMFCCI	2017
102	MPBSMA to expand its mandate to represent the various stakeholders of the sector	MPBSMA mandate is limited to merchants and not fully representative of the sector	MPBSMA has become the sector's APEX by expanding its mandate to represent the various stakeholders of the sector (growers and processors)	MPBSMA's new mandate and organizational structure	UMFCCI, MoC	2018
103	Monitor the production and improve quality of products along the supply chain	Feedback on quality issues is not collected and disseminated in the sector	Task force created to monitor quality (tests, markets) and feedback information in the sector	Task force mandate	DoA, DAR, MPBSMA, MoC	2019
104	Promote R&D for new varieties of higher yield and better monitoring of market demand.	Very low investment in agricultural and in particular in the sector R&D	Dedicated R&D activities part of the functions of at least 10 R&D centres	DAR and R&D centres budget and activity reports	DAR, DoA, MoALI, MPBSMA, Private Sector	2019
105	Upgrade existing laboratories and establish new laboratories to test physical analysis, phytosanitary and fumigation, chemical residues, food quality testing (carbon testing, benzopyrene)	Limited international cooperation prevents upgrading and accreditation of existing laboratories	Food safety certificates necessary for value added exports of foodstuffs are issued in Myanmar by accredited bodies	Number of accredited certification bodies / Number of certificates issued annually	MoALI, MoC, MoH	2020

Cluster V.3: Corn

#	Activity	Baseline	Target	Sources/Means of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Diversify exported products and export market by sustained development of processing capacity, increased market intelligence and better marketability of Myanmar corn</i>						
106	Negotiate quotas of officials export of corn to China, through road and sea transport	MoC will negotiate with international authorities to allow the official export of maize to China and other potential markets through the border route and to get an annual export quota via the sea route. Currently there is no official quota for export of corn to PR China and other potential international markets.	Negotiation made with China's Central Economic Committee through the Myanmar ambassador in Beijing to get an annual export quota to export both agricultural products via border trade camps and shipping.	Presence of Export Corn/Maize to China and other international markets using Quota System, Trade statistics and other export related documents	MOALI, MoC, MCFA	2020
107	Identification of policy reforms for the enhancement of capacity building of farmers to better assess export market needs and requirements	There is a strong need to develop high yielding hybrid corn/maize to increase productivity and total production of maize in Myanmar. Cultivation of corn is rather traditional and not export oriented.	Department of Agriculture as the leading agency to reform the enhancement of capacity building of farmers. Market study on the possibilities for corn as export product by Myantrade, followed by development of improvement plan of Department of Agriculture including capacity building for farmers.	Corn Sector Policy Reforms plan prepared, and presented and is being implemented	MOALI, MoC, MCFA	2020
108	Promote expansion of export Varieties	Currently, Myanmar corn is mainly utilized in poultry and livestock feed industries and some is used as human food and the surplus is exported as raw materials	Identification of possible corn/maize varieties for export promotion, and implementation of cultivation trails with new varieties and evaluation of results, also for further VC development	Sector Steering Body's mandate. Report with results and recommendations trails with new varieties	MOALI, MoC, MCFA	2020

109	Strategy development for a Sector Steering Body Establishment	Myanmar Corn Farmer Association has recently established and based in States and Regions. MoC started working at the regional level	A Sector Steering Body is established and a high-level policy body formalized under Myanmar MSTFBTP	A Sector Steering Body and a high-level policy body ToR or formalization under MSFTFBTP and TSWG	Department of MOALI, MoC, MCFA UMFCCL, Regional Associations	2020
110	Capacity development at processing level to diversify products exported	Currently, 6 varieties in open-pollinated varieties and 7 varieties in hybrid maize varieties were succeeded by Department of Agriculture and many varieties in hybrid maize has been imported by Private Sector. Some import replacement products related to corn consumption, corn based products and maize starch has been identified.	Establish pilot villages that can have access to technical assistance for producing of hybrid seeds and high yield and to identify other value chain varieties.	Feasibility study was conducted	MOALI, MoC, MCFA UMFCCL, Regional Associations	2022
111	Strengthening market linkages with other Asian markets (Singapore, India, Malaysia, Indonesia)	There is no proper market research conducted that has caused the consumptions leading to unstable market as well as unstable food consumer prices	Actors of corn value chains increased turnover, private sector organizations improved services and MFVP/ MTC promoted value chain development	Proper road map for corn export is endorsed in national level, and implementation measures have been effectuated. Export to Asian markets has increased	MOALI, MoC, MCFA UMFCCL, Regional Associations	2022
112	In line with MCFA long term plan road map, invest in dedicated facilities for export (storage, warehousing, conservation)	The systematic contract farming system is proposed. The availability of drying machines and storage facilities is limited	The national level contract farming system is established. At least five warehouses with drying installations have been established	Supply Chain and value chain services	MOALI, MoC, MCFA UMFCCL, Regional Associations	2022
113	In line with MoALI's Plan of action, invest in supply chain infrastructure along all spatial segments of the food supply chain	Myanmar's corn sector was driven by supply requirements and defined by the government and is narrowly focused on supply chain	Myanmar's corn sector was driven by supply requirements and defined by the government and is narrowly focused on supply chain	By promoting responsive input, productive technology, and reliable access to output markets and supply chain.	MOALI, MoC, MCFA UMFCCL, Regional Associations	2022

Cluster V.4: Fruits and Vegetables

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Promote and produce certified quality fruits and vegetables for export diversification</i>						
114	Identify strategic fruit and vegetable for export and develop export promotion strategy for selected item.	The value chain approaches to mango, tea, melon are already in progress	Fruit and Vegetable sector export promotion strategy is developed and being implemented	Export Promotion Strategy Documents	MoALI, MoC, MFVP, UMFCCI	2020
115	Developing a strong seed sector, stimulating foreign direct investment in seed sector by making the rules easier, clear, transparent and consistent and creating a National Seed Association NSA	There is a national level seed bank exists but private sector participation is not well established.	Complete development plan for the seed sector, including a strong seed sector organization and seed bank.	National Seed Association (NSA)'s ToR	MoALI, MoC, MFVP, UMFCCI	2020
116	Improving access to commercial production knowledge: assure appropriate messaging and marketing of extension, update information on banned products, best practices in production and post-harvest handling, integrated pest management (IPM)	Myanmar has limited access to international production technology on Fruits and Vegetable sector. It is required marketing of extension and is weak follow up best practices, integrated pest management (IPM).	The capacity building programs on commercial production where the private sector cannot cover is strengthened by means of public, private, INGO/ NGO collaboration.	Up-scale outreach of field based extension in key production areas and high quality extension materials	MoALI, MoC, MFVP, UMFCCI	2020
117	Work with the emerging supermarket/high-value retail sector or vegetable processing industry to pilot contract farming or out-grower schemes with smallholders who will receive training and support on improved cultivation and product quality.	The vegetable farming is still done under traditional practices and thus the quality remains relatively poor, and yields low.	Through PPD, the value chain approach for fruit and vegetable sectors is already established.	Number of SMEs certified BRC, GFSI or a few others.	MoALI, MoC, MFVP, UMFCCI	2020
118	Improve market information flow from consumer to producer (quality, quantity, price) and promote development of demand-driven grading and sorting standards for vegetable crops that can be communicated from market to grower via such systems	Currently the commodity exchange centers are in place in regional offices. But Myanmar is still uncertainty in the markets.	The export helpdesk at MTC is expanded with detailed information on fruit and vegetable market developments.	Helpdesk	MoALI, MoC, MFVP, UMFCCI	2020

119	Creating markets for high-quality vegetables, by improving market information systems (formal and informal) to convey information on quality and quantity demand in addition to price data.	Nearly a million rural households have an income from horticulture crops. There is an increasing market demand because of urbanization and economic growth.	The helpdesk is linked with international markets and chain partners and regularly updated feasibility surveys on high-end market opportunities. Data Collection for Horticultural crops among regions and states is established with annual horticultural crop production and export statistics.	Quality specification, delivery system, leading time, pricing structure, terms of payment and other contractual arrangements	MoALI, MoC, MFVP, UMFCCI	2020
120	Strengthen in the capacity of an association that can represent the wholesale sector and start dialogues and cooperation with other traders, government, etc.	National level commodity exchange center has not been established.	Evidence-based knowledge transfer and Public-Private Dialogue is established on profitable, responsible and sustainable fruit and vegetables sector.	National Commodity Exchange Center for Fruit and Vegetables	MoALI, MoC, MFVP, UMFCCI	2022
121	Improve supply chain logistics and technology – harvesting tools, hygienic containers, cleaning, sorting, waxing, packing, cooling equipment/technology, storage facilities (basic and refrigerated).	There is lack of pilot farming in the sector to add high value in the supply chain process	The high value chain pilot farms are established.	Numbers of pilot farms and survey of post handling production measures	MoALI, MoC, MFVP, UMFCCI	2022
122	Implement and build consumer confidence in a local level of GAP – export-ready (Global) GAP as a next step, for both pre-harvest and post-harvest best practices and develop awareness and adoption programs for both growers and private companies.	Currently Myanmar need consumer awareness on demanding GAP products. Already Myanmar National GAP setting up. Specific guideline for 15 crops is still preparing. Increasing growers awareness and adoption of Myanmar GAP. Currently there is two community managed packaging houses and two company packaging houses.	Existing export process and handling technology is upgraded.	strategic items' post handling loss is reduced	MoALI, MoC, MFVP, UMFCCI, Horticultural Crop Grower Associations	2022

123	Strengthen institutional capacity of Fruit and Vegetable Associations, clusters, producer groups to form a Federation to represent Myanmar Fruit and Vegetable Sector	Currently Myanmar has 30 product clusters, 9 branches and 1 Associations	Myanmar Fruit, Flower and Vegetable Procedure and Exporter Federation is composed of 25 Associations and 14 Branches and one association (Myanmar Fruit Flower and Vegetable Producer and Exporter Federation)	Myanmar Fruit, Flower and Vegetable Procedure and Exporter Federation	MoC, MTC, MOALI, MFVP	2017-2020
124	Improve existing infrastructure and building new ones to facilitate connectivity	Strengthening existing postharvest infrastructure and transportation vehicles.	Provision of ventilated warehouses, cold chain facilities in States and Regions of Myanmar. Provision of food safety and residue analysis laboratories for export and export commodities.	Established a sub-domain database system in MTC, Food safety quality assurance lab establish in major entrance of international trade.	MOC, MFVPA, MTC, MOALI, UMFCCI	2020-2025

Cluster V.5: Agro-food processing

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: A private-sector oriented, export-focused strategy enables the development of multi-product agro-food processing industry</i>						
125	Selection of exportable goods based on market intelligence, establishment of publicly available information on strategic export products, support for participation in international product fairs	Laws and regulations regarding food in Myanmar have already been promulgated, but their effectiveness is by no means guaranteed. There is no Export Guidebook for specific commodities and no systematic attention for export potential of agro-food industry.	Awareness on the potential of exports is well established through publication and distribution of Export Guidebook for Myanmar Agro-food industries, product/ market studies from Myantrade and exporter participations in trade promotion activities.	Myanmar Export Guidebook, Myantrade product/market reports, Targeted trade fairs	MoC, MTC, MFVP, MoALI, MoI UMFCCI	2020
126	Establishment of information on support programs for export, support on commercialization of export products;	Weak system for dissemination of information on Strategic Export Products has not been developed. A system of Myanmar Export Promotion of Agricultural Products has not been identified.	The website for Strategic Export Products is developed. Myanmar Export Promotion of Agriculture Products System is established.	Webpage and Working Committee's ToR	MoC, MTC, MFVP, MoALI, MoI UMFCCI	2020
127	Develop better packaging practices: exemption of import tariff on packaging material; establishment of training institution for packaging and design establishment of packaging and design center;	There is no systematic attention for the importance of packaging. There is no national level design institute/ design centre	Plan for developing and establishing a design institute, including financing opportunities and course programme.	Packaging and Design Centre for the Agri-food Industry is built	MoC, MTC, MFVP, MoALI, MoI UMFCCI	2022
128	Support for certification of processed products for export; marketing initiative for indigenous products	The system of food safety inspection and control is inadequate, and misses supporting food legislation and regulation.	Mandatory certifications for products required by the exporting countries based on health and safety requirements are identified and supported in Myanmar with sanitary and phytosanitary certificates	Good Agricultural Practices (GAP/ GMP/ HACCP/ ISO) Certification Fee Project and Sharing Pesticide Test Fee Projects	MoC, MTC, MFVP, MoALI, MoI UMFCCI	2020

129	Enhance the potential crop items and diversification of cultivation of crops item	Initial Market Analysis of domestic, regional and international markets has not been conducted. (2)	Mandatory certifications for products required by the exporting countries based on health and safety requirements are identified and supported in Myanmar with sanitary and phytosanitary certificates	Establish a sub-domain database system in MTC	MoC, MTC, MFVP, MoALI, MoI UMFCFI	2022
130	Provide tax incentives for domestic companies and FDI; control of border trade to secure domestic demand	There is no incentive policy for Myanmar's Food Cluster in national level.	Investment schemes for Myanmar's Food Cluster is identified and endorsed.	Various schemes on national tax, local tax, tariff exemption, transportation, free land lease, investment subsidy, employment subsidy, education/training subsidy, consultation subsidy etc.	MoC, MTC, MFVP, DICA, MoALI, MoI UMFCFI	2022
131	Export-import link system and establishment of incubation centres for SMEs promotion. Promotion of quality control laboratories.	Projects to SME value chains are underway in States and Regions, most the businesses involved are related to the processing of agricultural goods. Yangon National Incubation Center under FDA and mobile team is providing technology transfer. Currently, MOALI is establishing a new laboratory and UMFCFI has already a laboratory.	Quality Control Laboratories are established in key States and Regions of trade.	SMEs Promotion Trainings and Syllabus and various pilot projects.	MoC, MTC, MFVP, DICA, MoALI, MoI UMFCFI	2022

132	Develop the production of organic products including understanding of the individual markets on which organic products to grow and participation in trade fairs and exhibitions and knowledge transfer to farms and players in the industry.	Safe Food Safe Farm has been initiated.	Differential markets for organic products, fair trade and exhibitions are promoted.	Trade Fairs and Exhibitions mixed with National Branding and number of certified organic product center	MoC, MTC, MFVP, DICA, MoALI, MoI UMFCCI	2022
133	Promote Myanmar Agro-based products as a quality brand and enhance competitiveness in international trade.	Traceability of rice and Agro-based products with GAP, GMP and HACCP will be initiated. (1)	Awareness Seminars on branded Agro-based products need to be held for exporters and importers. (1)	GAP/ GMP certification fee and pesticide MRL Test fee for value added products. (1)	MOC, MFVPA, MTC, MOALI, UMFCCI	2020-2025

Cluster V.6: Fisheries sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Upgrade the fisheries sector sustainable production techniques to diversify export products and markets</i>						
134	Build the branding of fishery products and industry in order to compete successfully in international markets.	Intelligence on products, sub-products, market opportunities, importer requirements	Dedicated tools (website, product guide, international fair opportunities) are made available to the industry and Myanmar overseas representations	Website and brochures produced in DoF, MoC and Embassies	DoTP, DoF, MFF	2017
135	Enhance the organization of the sector through increased dialogue and partnerships	Inadequate policy framework and ineffective public-private dialogue (PPD) in support of the fisheries sector limits its growth	Established permanent PPD mechanisms for the sectors, with structured agenda and reporting mechanisms	PPD meetings agenda and minutes, Composition of PPD group	MFF, Private sector organizations / associations	2018
136	Implement a long-term training and certification programme for technicians, inspectors and trainers at DOF/Ministry of industry and processing factories to be qualified on GMP/HACCP, food safety and processing training to SMEs.	Quality and safety certification is costly to SMEs due to a lack of local training capacity	A pool of trainers is certified as trainers on the different aspects of quality and safety standards applicable in the sector	List of certified trainers	MLFRD, MoI, MFF, MPEA	2019
137	Update and promulgate new laws in favour of an harmonious development of the fisheries sector, including on access to land for aquaculture	The legislative framework relies on out-dated laws not addressing a number of issues including fish disease control, environmental impact assessments, and aquaculture guidelines and codes of conduct	Set of priority fisheries-related laws upgraded to account for the development of the sector for the past 20 years	Laws updated / New laws enacted	DoF, MFF	2020
138	Establish demonstration schemes on modern production technology to ensure effective adaptation /modernization of current technologies through collaborating with international and regional fisheries institutions.	Current aquaculture production uses outdated technology limited sector attractiveness and productivity	Demonstration scheme established and operational with support from leading organizations	Information on demonstration schemes disseminated in key sector organizations	Regional / State governments, MFF, FAO, SEAFDEC, NACA	2020

139	Upgrade/establish disease diagnosis/fish health/fish feed laboratories with up-to-date equipment to facilitate essential tests for fish health and international trade.	Food quality and food safety cannot be thoroughly accredited for lack of testing capacity	DoF labs are upgraded to meet more parameters, targeting key export markets requirements	Laboratories testing services	MFF, FAO, SEAFDEC, NACA	2020
140	Construct public cold storage facilities in major cities to better manage exports and imports of perishable goods.	Inadequate cold storage mechanisms and power supply leads to inconsistent quality, safety hazards and damaged goods	PPP mechanisms are in place to increase the number of public cold storages near landing sites	Number and location of public cold storage places	MoALI, DoF	2020

Cluster V.7: Forestry sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Strengthen the organization and governance of the forestry sector to diversify export and make the sector environmentally and economically sustainable</i>						
141	Improve the system in place for issuing exports licenses for timber products by simplifying and streamlining the administrative procedures and improving their transparency.	Complex and lengthy procedures to obtain license for export of timber products, spread across different government agencies	Higher proportion of legal & certified timber in the market	Exports of timber products (Customs and/or MoC data)	MNREC, Customs, buyers	2018
142	Implement the strategy for the processing of low added value forestry products (such as teak flitches, squares, board, planks, etc.) targeting, among others, veneer treatment and mini-decking, with a view to increasing export value in Myanmar	Very little transformation occurs in Myanmar and higher value added wood-based products remain largely underdeveloped	Decrease in low-value products export volume by increasing value addition in Myanmar	Strategy implementation report, exports of high-value timber products	MNREC, Customs, MoC, MTMA	2018
143	Introduce a system whereby open tendering becomes the only way of purchasing raw timber materials	The Government has already imposed an export ban on raw timber logs	All timber is sold through open tenders only	Sales of raw timbers (volume, buyers, wood types, price)	MNREC, MTMA	2018
144	Introduce a policy to announce next year's estimated quota (for the tender) in a timely manner (i.e. before the end of the current year). Adopt a regular publishing of the allowable quotas for tendering by local industry in advance on a monthly basis.	The current procurement procedures for upstream supplies is not transparent enough for all potential buyers	Announcements are published on the website and are made on a monthly basis and in advance	Announcements on website(s)	MNREC, MTMA	2018
145	Set up a working group with private–public stakeholders to meet on a monthly basis to discuss developments and issues related to exporting and production (including taxes, investment, obstacles etc.)	Working group currently meets on an ad hoc basis and is not formalized	Regular meetings take place, decisions are taken and policies are adopted to favor the industry	Working group composition, policy notes and proposals (agenda) prepared	MNREC, MTMA	2018
146	Have Myanmar Forest Products and Timber Merchants' Association evaluate the practical measures it could adopt to raise awareness and punish offenders	Limited actions taken against logging and exporting offenders	MTMA introduces a blacklisting system against offenders	Reports and surveillance of performance of MTMA members (and non-members)	MTMA, FD	2019

Cluster V.8: Rubber sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Foster innovation and sustainable growth in national and global rubber value chains</i>						
147	Establish a Rubber Board to oversee all activities in rubber products industries, upstream, downstream, marketing. Prepare operational and management guidelines, and necessary legislation and regulations for the establishment of a Rubber Board.	Inefficiency of the trade support institutions in the rubber products sector, which leads to poor linkages and coordination between the various stakeholders	Create a strong regulatory framework through the establishment of the Myanmar Rubber Board	Board established and registered with relevant organizations.	MoALI, MoI, MRPPA, MoC DICD, UMFFCCI	2017
148	Promote Myanmar's natural rubber and related rubber products industry internationally.	No centralized and up-to-date information on opportunities in domestic, regional and international market opportunities available to sector players	A website centralizing relevant information for the sector is set-up and populated regularly with up-to-date information and opportunities	Website on line	MoC, DICD, No. 2 HIE, MRPPA	2017
149	Carry out a feasibility study for setting up a Myanmar Rubber Trade Promotion Committee (MRTPC).	No dedicated platform for rubber trade promotion in spite of sector potential	Assess the feasibility of setting up the MRTPC	Study is validated by relevant organizations and disseminated with DPs	MoC, DICD, No. 2 HIE, MRPPA	2017
150	Conduct a feasibility study on establishing a Rubber Development Fund for the sector.	Access to funding to develop basis capacity in training, R&D, seed investment capital for sector development is almost inexistent	Study developed, results endorsed, including steering structure and operational guidelines (proposals, grants)	Study validated by relevant authorities	DICD, MoALI, MRPPA	2018
151	Introduce a registry system for nurseries, which should be maintained regularly by MoALI (DICD).	Absence of control or regulation of nurseries regarding distribution of the recommended cultivars to planters	The registry system is established	Number of nurseries registered and statistics on nurseries	DICD (MoALI), MRPPA	2018
152	Issue quality analysis certificates and obtain international accreditation of labs.	No international accreditation for rubber testing laboratories in Myanmar results in reduced target market confidence for domestic exports;	At least two laboratory are accredited internationally to issue certificates	Number of internationally recognized certificates issued	DICD, MoALI, MoC, MRPPA	2019

Cluster V.9: Garment sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Facilitate job creation and export development in the garment sector through cross-cutting and sector-specific policy measures</i>						
153	Extend the same duty exemptions enjoyed by importers of CMP inputs to importers of FOB inputs	Myanmar garment manufacturers assemble buyer-owned inputs for re-export limiting access to competitive sources of quality inputs	Myanmar garment manufacturers procure their own inputs from international vendors to fulfill their export orders	Customs (exemption of duty on FOB inputs)	MoPF, Customs, MoC, MGMA	2017
154	Establish a working group to reduce the number and processing time of official procedures for garment factory start-up (e.g. registration, so that start-up time is reduced from four or five months to one month).	Cumbersome Government procedures decrease sector competitiveness by increasing the time and cost needed to open factories, export goods and import spare parts	Reduced number of required documents and/or special procedure for garment factories	Average processing time for official procedures provided by MGMA	Mol, MLIP, regional governments, UMFCCI, MGMA, MIC, MoC	2018
155	Commission a feasibility study to review potential SEZ or STGZ sites and make recommendations on location, size, infrastructure, rates, ownership and management structures, services, impacts, risks, etc.	No fully serviced SEZs dedicated to garment factories and supporting industries exist in Myanmar, to act as potential cluster growth poles	Study provide detailed site analysis for at least five locations	Study findings are endorsed by the Government	Ministry of Construction, MoTC, MoC, MoEE, private sector representatives, UMFCCI, MGMA	2018
156	Articulate regulations for the trained worker retention clause of the Employment and Skill Development Law and enforce them, so that employers and workers may engage in meaningful contracts negotiations	High turn-over of unskilled labor in the sector due to labor and skill gaps and difficulties to retain foreign workers	Employment and Skill Development Law upgraded to include provisions for training and certifications for staff against commitments to remain in firms for longer contractual periods	Regulations published and enforcement mechanism operational	UMFCCI, MGMA	2018
157	Implement a vocational programme for machine operation and maintenance, production management, industrial engineering, fashion design and computer assisted design operations.	Training for unskilled and semi-skilled workers offered on ad-hoc basis, not catering for possible up-skilling	New technical training on more complex tasks developed and offered to guarantee promotion and up-skilling	Training curriculum	Vocational training schools, UMFCCI, MoC, MLIP, UMFCCI, MGMA	2018

158	Form a high-level policy steering body (e.g. Inter-ministerial committee) dedicated to the coordinated formulation and implementation of strategic policies and initiatives for the promotion of the textile and garment sector.	Several public and private institutions work in isolation for the promotion and advocacy of the sector with Government institutions	High-level policy body formalized under the Myanmar MSTFBTP	High-level policy body ToR or formalization under MSTFBTP	MOPF, MoI, MLIP, MoALI, Customs, MoC, UMFCCI, MGMA	2018
159	Implement a “garment development plan” with assistance from development partners	No overarching sector development plan or vision currently in place in spite of the sector’s contribution to employment and GDP	Development plan is produced, including a fiscal dimension, improved labor regulation regime and an infrastructure development plan	Development plan is endorsed and launched at highest level	MoI, MoC, MGMA, UMFCCI	2019

Cluster V.10: Gems and Jewels

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Enhance revenue-generating gem and jewelry industry to generate value added in manufactured and exported jewelry products and ensure sustainable sector development</i>						
160	Establish Gem & Jewelry Promotion Act: Enact Gems and Jewelry Promotion act as a legal basis to support promotion of gem and jewelry industry	The 1995 Myanmar Gemstone law has been amended twice (2 nd amendment, PyidaunsuHluttaw Law 23/2016 of 29 January 016). Currently, Myanmar is implementing in compliance with Myanmar Gemstone Law. It is necessary to establish a strong export & import Law on Gem & Jewelry Sector.	Law is passed by Parliament. Revision of foreign investment laws to promote investment in gem and jewelry industry is conducted. Domestic Gems and Jewelry value chain market is established. Rough stone export is reduced and value added items are promoted.	Law enacted, and published in the official gazette, and disseminated through the different sources of Gems and Jewelry mining and manufacturing industry	MoNREC MGE, DICA, MIC MoC, UMFCCI, MGJAEA,	2020
161	Strengthen public-private cooperation for export promotion to improve the efficiency of government policy regarding the gem and jewelry industry	Public-private dialogue for export promotion on the value-added work on gem and jewelry industry is limited and sales and marketing of gems and jewelry needs official authorization. It is necessary to expand the Gem & Jewelry market at the big cities and to have open clear and strong export government policy.	Public Private Dialogue mechanisms are structured with a lead agency for gem and jewelry value chain. To promote Gem & Jewelry Products Export. Upon law and policy, practice accordingly.	Composition of government-led PPD Working Group, agenda and minutes of WG meetings is developed. Export and Import market is coming up.	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2020
162	Strengthen export incentives to create a value-added based gem and jewelry industry, building value chains from gemstone cutting, through jewelry setting, to export is important.	The current minerals policy that any kind of rough stones may not be exported. Taxes will be levied according to existing domestic relevant regulations. It is necessary to promote private sector Gem & Jewelry Products, to enhance the capacity of domestic and international experts.	Incentive Schemes for jewelry manufacturing are strengthened in the whole supply chain process. International standard gem & jewelry products are already are produced. The number of technical experts is increased.	Incentive schemes are disseminated in key sector organizations, Curriculum for Training School for Design, Cutting Carving of Jewelry, The Number of International Technical Experts	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2020

163	Support export marketing for overseas gem and jewelry marketing by SMEs, including participation in international exhibitions, should be strategically promoted by Myantrade.	Exports of rough gems and polished gems and jewelry sales of jewelry to sales is limited to government run emporiums and selected markets. It is necessary to promote SME in order to compete in international markets.	Brand Development of Myanmar Gems & Jewelry Sector is interlinked with Tourism Sector. It is necessary to promote Export Promotion for SMEs.	Number and location of International Trade Fairs, Exhibitions and Emporiums; Access to Finance	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2020
164	Build on-line market platform that specifically selling Jade products on the Chinese market and build a system of on-line settlement and shipping to support international transactions including insurance and legal documentation requirements	Emporiums are the only way to sell to international markets and cannot prevent illegal export through border trade. It is necessary to expand the international market through on-line. There is still weak in using banking system and logistics.	A system of on-line settlement and shipping is established to support international transactions and logistics. It is necessary to enter the international market of Gem & Jewelry Products.	A Common platform (website) for online-marketing exists and is operational (e.g, number of visitors, transactions, sales volume). Number of online Customer Service.	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2020
165	Enhance capacity of designers to be competitive in the jewelry market, attracting creative and designers to be well aware of global market trends	Lack of capacity building and skill development trainings in international design. It is necessary to establish the trainings by using the high technology machinery and equipment.	Joint activities of training and capacity building program in Public Private Partnership Programme led by government are organized. International Standard (Value Chain of the Product) design on products has been promoted. The skill of designers has been enhanced.	Gems and Jewelry training schools in existence and curriculum including world wide knowledge of designer, is developed and international	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2020
166	Establish Gem & Jewelry Export Promotion Council and Jewelry Industrial Development Committee to effectively cope with various difficulties faces by exporters in the long-run, a high-level public-private coordination mechanism.	There is no high-level body that helps the various difficulties faced by exporters. It is necessary to coordinate and facilitate among ministries for the implementation process. Federation of Myanmar Gems & Jewelry entrepreneurs needs capacity building in international markets.	Gem & Jewelry Export Promotion Council and Jewelry Industrial Development Committee are established. Gem & Jewelry export promotion in compliance with the endorsed law is implemented. Guidelines for responsible Committee are developed.	GJEPC's and JIDC's ToR or formalization under MSFTFBTP; Trade Policy Gem Law;	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2022

167	Support brand development	There is no national branding plan to link with tourism sector and gem and jewelry sector. It is necessary to develop Responsible Sourcing of Gemstone in compliance with the Laws, rules and regulations It is also necessary to be based on SME for public.	National Branding Plan is developed. The fair pricing structure to penetrate the market is developed.	National Branding Activities/ Events	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2022
168	Establish design centres to provide a favorable environment that encourages future designers and support creative design commercialization and protecting intellectual rights of designers.	There is no incentive programme to promote the favorable business environment to response to global market trends. It is necessary to develop Gems & Jewelry products by establishing domestic training school.	Sustainable Design Plan is developed through PPP. Investment promotion plan for establishment of design institute is identified. Job opportunities to expand the modernized design are created.	Design Schools and/or national design institute operational	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2022
169	Establish education and training institutes to get skilled labor through a network of vocational schools, specialized training institutes, colleges to supply skilled workers and organized curriculum	There is no national level design institute. There is no vocational training programme for skilled labour in jewelry manufacturing.	Investment promotion plan for establishment of design institute is identified. Curriculum for education and training is developed and instituted at vocational training schools. Government to Government collaboration programme is developed.	Gems and Jewelry Academy	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2022
170	Host local campuses of global institutions to earn international recognition to train specialists in gem and jewelry to upgrade Myanmar's reputation in the global market	There is no local campus of world-class institutes. It is necessary to provide oversea trainings to the technicians to get high value chain training.	Public-Private joint campus is identified and the national level coordination with global institutions is identified. The high value chain on Gems & Jewellery sector by getting international standard technicians is established.	Training Programme and syllabus; and International Technology, Modernized Equipment, Technician	MoNREC MGE, MoC, UMFCCI, MGJAEA, Regional Associations	2022

Cluster V.11: Tourism sector

#	Activity	Baseline	Target	Sources/Mean of Verification	Responsible Agencies	Timeframe
<i>Cluster objective: Seize revenue generation and inclusiveness opportunities presented by the tourism sector by promoting new products and destinations and remove key regulatory bottlenecks</i>						
171	Accelerate implementation by MoHT of the six main strategic pillars of the Tourism Master Plan 2013-2020	The Tourism Master Plan (TMP) was launched in 2013 but multiple initiatives are not always aligned with the plan objectives	The TMP implementation is monitored on an annual basis to ensure all sector initiatives are aligned and harmonized	TMP implementation stock-taking review	MoHT, MTF	On-going
172	Expand the utilization of e-visa system.	E-visa system has been re-established but use not widely popular yet and still cumbersome for business visas	Steady increased of e-visas issued thanks to widely available information	MoHT statistics	MLIP, MoHT, MoFA, Central Bank, MoTC	On-going
173	Improve the dialogue between MoHT and tourism federations and associations, to include new issues and ways to promote sustainable development of the sector	Multiplicity of tourism actors and limited capacity of MoHT to engage in public-private dialogue on key sector development issues	PPD on tourism is structured along the Tourism Master Plan objectives and recommendations, with stronger and better coordinated associations		MoHT regional governments, MTF, regional associations	On-going
174	Establish a weekly magazine to advertise cultural events, entertainment, dining and outings, with both electronic (web-based) and paper formats in English language for tourists and locals (along the lines of 'Time Out') in major destinations (Yangon, Mandalay, Bagan).	Limited information available to tourists on cultural events in major tourist destinations	Magazine successfully launched in at least one major destination in English, available also in a web-based format	MoHT and business associations website, embassies, hotels, restaurants	MTF, MoHT, MCRA, MoTC	2017
175	Organize an awareness-raising campaign at the national and state levels to sensitize authorities (government, police) and tourism professionals on the economic importance of tourism, and the benefits in terms of positive image-building, through training workshops, press advertisements and media spots	Awareness of impact of tourism on economic development, employment, revenue generation and inclusiveness is not widespread in Government and national authorities	Awareness campaign conducted in major tourist destinations and states on tourism impact	TV reports and press articles on the awareness campaign	MoHT, Sector Associations	2017

176	Strengthen vocational training programmes in technical schools and training centres, in partnership with the private sector, to provide internships and to facilitate access to the tourism job market and improve the skills of young graduates	No national standards for curricula or the assessment of qualifications, insufficient vocational training. Lack of basic or mid-level technical training schools for tourism and hospitality in partnership with the industry	Vocational training programmes developed, recognized and certified by the Government	New training curriculum offered by vocational training schools	MLIP, MoHT, Myanmar Hospitality Professionals Association, MTF	2018
177	Align and harmonize rules and regulations on tourism and related standards between Union and State governments to allow development of new tourism products (ecotourism, adventure, homestay, etc.)	Union policies are often unclear and restrictive, leading to discord between state government policies that are not in line with Union policy with regards to regulated activities.	Rules and regulations on tourism and related standards are harmonized between Union and State governments	Rules and regulations on tourism	MoHT, regional governments, MTF, regional associations	2018
178	Review licence process for hotels and establish coordination on policies and infrastructure in certain destinations	Cumbersome licensing process for new investments in hotels, involving several institutions	Improving licensing procedure by making it easier to acquire or transfer of license	Legislations / Trade Portal	MoHT	2018
179	Assist with the development of a branding strategy for the tourism sector based around the vision statement 'Charming Myanmar', including marketing and promotion on existing nation branding "Myanmar: Let the Journey Begin", developing messages, marketing material and communication channels and Training of tourism professionals on implementation of the branding strategy	Lack of national branding leads to poor understanding of attractions and inability to redefine image	Branding strategy developed and deployed	UMTA and MoHT websites, advertisement on mainstream media	UMTA, MoHT, MTF, MoHA, MRA	2019
180	Focus tourism development in ethnic areas near these key border crossings so cater for the high volumes of tourists coming into Myanmar through land borders	Two thirds of visitors arrive in Myanmar through land borders but limited tourism attractions in the zones prevents tourism development	Average duration of tourist stay in border areas increases from 1 to 2 days	Visitor statistics (MoHT)	UMTA, MoHT, MTF, MoHA,	2020
181	Build the human and IT capacity of Myanmar immigration services in data collection about travellers' arrivals and profiles for commercial purposes	Very limited data on tourists are collected, categorized and analyzed, limiting their use by the tourism authorities and industry for statistical, market research and promotional purposes	Systematic surveys deployed Software and hardware requirements satisfied Immigration services trained	MoHT Statistics (categorization, accuracy)	MLIP, CBM, MoTC, MoHA	2020