



MYANMAR TOURISM STRATEGIC RECOVERY ROADMAP 2021-2025

DETAILED ANALYSIS & ACTION PLAN

**MYANMAR MINISTRY OF HOTELS AND TOURISM
SEPTEMBER 2020**

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MYANMAR TOURISM STRATEGIC RECOVERY ROADMAP (2021-2025) Detailed Analysis & Action Plan



Copyright & Acknowledgements

His Excellency U Ohn Maung, Union Minister, Ministry of Hotels and Tourism initiated and supported the development of the Myanmar Tourism Strategic Recovery Roadmap in response to the devastating impact of COVID-19 on the Myanmar tourism sector in 2020. The Roadmap links the Tourism Master Plan (2013-2020) with a future Tourism Master Plan (2021-2025) which is currently under development by the Ministry.

Significant inputs were provided by senior officials of the Ministry of Hotels and Tourism, members of the Myanmar Tourism Federation, individuals from the tourism sector in Myanmar and from experts within the UNWTO. Thanks go to the UNWTO for preparing the original scoping mission for a Tourism Master Plan late in 2019 and to the Government of the Grand Duchy of Luxembourg for funding the MTSRR itself.

A team selected by the UNWTO and Luxembourg Development Cooperation Agency assisted the Ministry in drafting the MTSRR. The Myanmar Tourism map was provided courtesy of the Myanmar Information Management Unit. Photos were provided by the Ministry of Hotels and Tourism.

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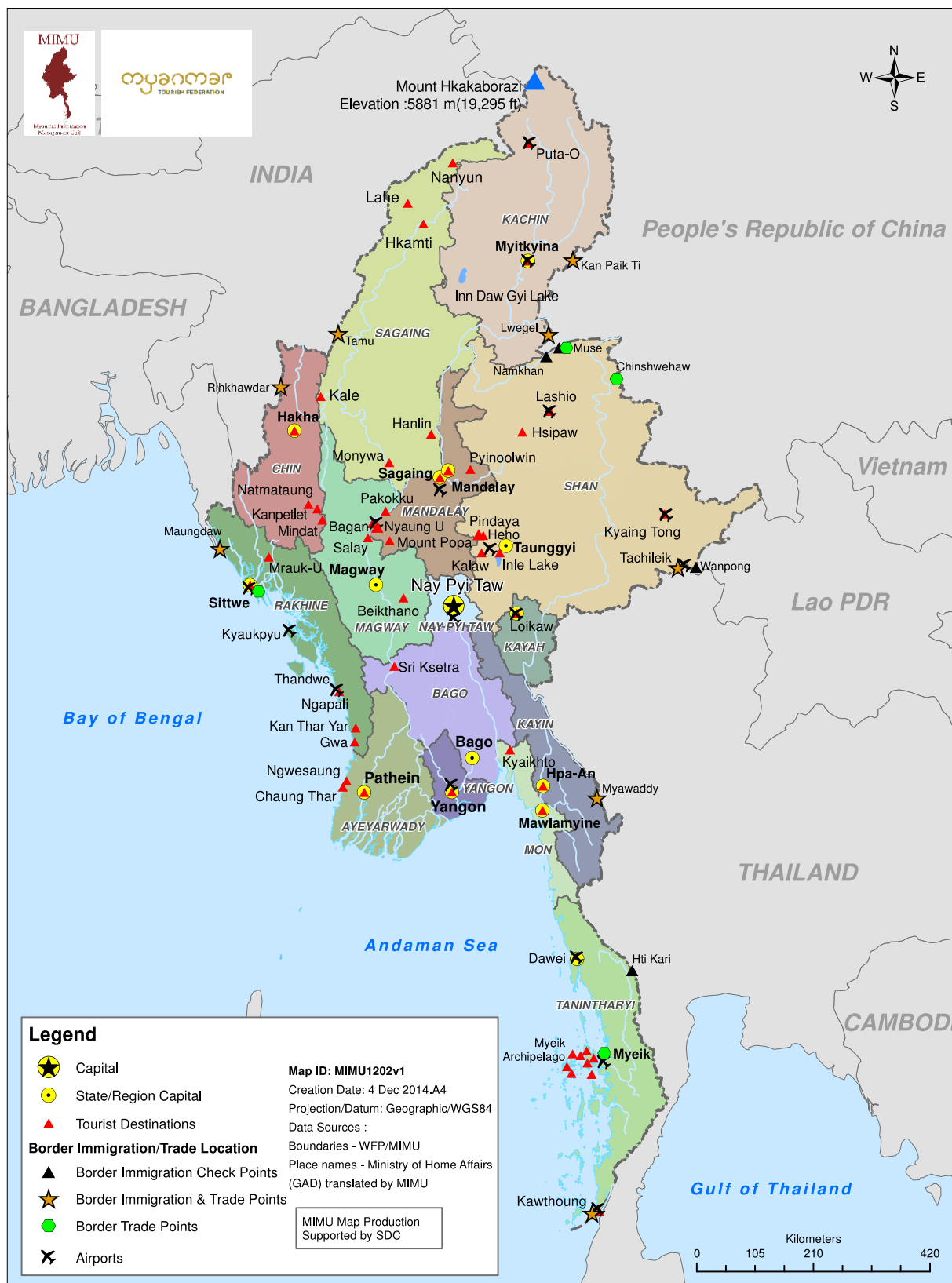
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Existing & Emerging Tourism Destinations in Myanmar



Disclaimer: The names shown and the boundaries used on this map do not imply official endorsement or acceptance by the United Nations.

Figure 1: Existing & Emerging Tourism Destinations in Myanmar (MIMU - Myanmar Information Management Unit)

Foreword from the Union Minister for Hotels & Tourism

Tourism forms a vital contribution to our economy and the well-being of our nation. The Covid-19 pandemic has impacted every aspect of our tourism sector: independent guides, small businesses, travel agencies, transport, hotels, restaurants, as well as those who work in the supply chain.

Our immediate concern is to provide as much support within our resources to assist those who have lost their jobs and whose businesses are struggling.

We must however take the opportunity to think of the future, to be ready for re-opening of tourism, to rebuild a resilient, vibrant, and innovative sector that provides greater opportunities for job creation and economic growth that shares the benefits of tourism more widely for all of our citizens.



I would like to thank the UNWTO and LuxDev for their support in developing this roadmap for tourism recovery, and everyone from all sectors who contributed to the MTSRR.

I would also like to take this opportunity to commend everyone from MoHT and our partner Ministries for their hard-working efforts to rebuild tourism during these difficult times.

Let us continue to cooperate, collaborate, and communicate to ensure the most effective use of all our resources to restart tourism in Myanmar.

A handwritten signature in blue ink, likely belonging to H.E. U Ohn Maung, the Union Minister for Hotels and Tourism.

H.E. U Ohn Maung
Union Minister
Ministry of Hotels and Tourism
Republic of the Union of Myanmar
Naypyitaw

September 2020

Message from the Secretary-General UNWTO

The COVID-19 pandemic represents an unprecedented crisis for the tourism sector. And it is one that has affected every global region. UNWTO data indicates that international tourist arrivals dropped by 65% during the first half of 2020. This translates into a loss of 440 million international arrivals and about US\$460 billion in export revenues.

The outbreak of COVID-19 has impacted countries at different times, in different ways and to varying degrees. Yet around the world responses to curb the pandemic have taken the shape of national lockdowns and the wide implementation of travel restrictions. In many places, borders have been closed completely, making tourism one of the hardest-hit of all the major economic sectors. The extensive and deep impact of COVID-19 on tourism, coupled with its importance for economies and for jobs, means the strongest possible support for the sector is needed at both the national and international level and through all the relevant institutions.

It was, therefore, timely and opportune to work together with the Ministry of Hotels and Tourism of Myanmar and the Luxembourg Agency for Development Cooperation on supporting tourism sector stakeholders along the path to recovery by devising an action-oriented Roadmap.

The Myanmar Tourism Strategic Recovery Roadmap provides immediate reflections on how Myanmar's tourism industry is structured, and how it may be adapted to meet the future demands of visitors once international travel can recommence in light of the current pandemic. It also outlines potential scenarios for recovery.

A strategic roadmap for Myanmar tourism recovery will serve as a bridge between strategy and implementation. It visualizes the key outcomes that must be delivered over a particular timeframe in order to achieve the Ministry's strategic vision. The outcomes of the strategy roadmap are substantiated by a clear understanding of the best way to address the capabilities, gaps and priorities of Myanmar tourism.

The importance of tourism as a source of employment and driver of development cannot be overstated during times of crises. At the same time, through crises come opportunities to make tourism more resilient, more sustainable and more inclusive. We sincerely hope that through this Roadmap, Myanmar will be able to guide the recovery and future growth of its tourism sector for the benefit of all.



Zurab Pololikashvili
Secretary-General

Message from the Ambassador of Luxembourg to Myanmar

These are unprecedented times. The COVID-19 pandemic has caused a dramatic decline of the tourism sector globally, and uncertainty has become a kind of new normal for any country in the world to live with and plan for. Loss of hospitality and tourism jobs, closure of businesses and severe impacts on the economy of Myanmar is a crisis for the sector and the country.

This is exactly the reason why the Government of the Grand Duchy of Luxembourg, through the Luxembourg Ministry of Foreign and European Affairs (MFEA) are proud to support the Government of the Republic of the Union of Myanmar with the development and publication of this important Myanmar Tourism Strategic Recovery Roadmap (MTSRR) to set out a clear understanding of the best ways to address capabilities, gaps and priorities of Myanmar tourism in the immediate term and in the years ahead.

The first bi-lateral Government of Luxembourg development cooperation in Myanmar managed by the Luxembourg Development Cooperation Agency (LuxDev) focuses on HR development for tourism through Project MYA/001 - Development of Human Resources in the Hotel and Tourism Sector and Capacity Development of the Ministry of Hotels and Tourism (MoHT). This six-year (2015-2021) project with a Luxembourg budget of 8.5 million EUR aims to maximise hospitality and tourism contribution to national employment and income generation. The MTSRR is a measure of the commitment of both governments to come up with a flexible and focused 5-year plan to help tourism recover, reset and relaunch in Myanmar.

The Roadmap highlights the priorities for immediate and concrete actionable activities that can help Myanmar's tourism sector through the 2020-2021 traditional high season, and to make sure, as much as possible, travel and tourism can still contribute to Myanmar's economy and reduce impacts of unemployment. Medium-term actions address some of the issues that affect innovation and entrepreneurialism in tourism development, and encourage businesses and the public sector to adapt to change. Long-term actions focus on tackling some of the more structural issues facing tourism development in Myanmar.

The importance of tourism as driver of development cannot be overstated during times of crises. At the same time, through crises, the MTSRR shows the way forward and contributes to the vision of the country in supporting the national economy and supports peace and socio-economic development of Myanmar, especially in the short to medium-term through the expansion of domestic tourism.

In this important election year, we continue to strengthen our partnership with the MoHT and other development partners and stakeholders in the tourism sector to enhance understanding between diverse ethnicities and cultures, to foster tolerance and peace and lead to a more stable and inclusive society.

Jean-Paul Senninger, Ambassador of Luxembourg to Myanmar.

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1. INTRODUCTION

These are unprecedented times in tourism. The COVID-19 Pandemic has seen the decimation of the tourism sector globally, the suspension of international arrivals to Myanmar, and a series of travel restrictions that has impacted our emerging domestic tourism sector. Initial planning scenarios for the re-opening of tourism in time for our traditional high season in September /October 2020 have not happened, and initial growth in domestic travel has been curtailed at time of writing due to the new wave of COVID-19: uncertainty is the new normal we must live with and plan for.

The COVID-19 situation has yet to stabilise globally, and there are many factors that we do not know, especially when international travel may re-open, and how the demand for travel will be in the future. We must take this as an opportunity to re-evaluate tourism in Myanmar to make it more resilient in future scenarios, and to take immediate actions to mitigate issues of unemployment, business closures, and impact to the economy that will result from the pandemic.

1.1 A Strategic Recovery Roadmap

Based on our previous Tourism Master Plan (2013-2020), the MTSRR is our response to COVID-19 and aligned with UNWTO Global Recommendations to Restart Tourism. The Roadmap will integrate and expand our new six-pillar Tourism Master Plan outline to be presented to the Cabinet for implementation over the coming five years. The Roadmap will be the action plan for the Master Plan.

The goal is that before the 2021 Myanmar New Year, all State and Regional Tourism Committees (RTCs) will develop their own State and Regional Master Plans to reflect the actions in the MTSRR. Two forums will be held each month after the November election with industry stakeholders in each State and Region. To support the RTCs, we will advise and support newly created District and Township level Destination Management Organisations (DMOs) to create their own destination specific one-year action plans as a foundation for each State and Region's Master Plan.

The Myanmar Tourism Strategic Recovery Roadmap aims to provide immediate reflection on how Myanmar's tourism sector is structured, and how it may be adapted to meet the future demands of travellers once international travel can recommence in light of the current pandemic, and potential scenarios for recovery.

A strategic roadmap helps us focus on what must be changed, why it must be changed, and in what sequence the change should be carried out: a strategy roadmap is not a visual Gantt Chart of activities with start dates and end dates, rather it describes what must change, and why the changes are required, in order to achieve the strategic vision.

A strategic roadmap for Myanmar tourism recovery will be a bridge between strategy and implementation. It visualizes the key outcomes that must be delivered over a particular timeframe in order to achieve the MoHT's strategic vision. The outcomes on the strategic roadmap are substantiated by a clear understanding of how to address the capabilities, gaps and priorities of Myanmar tourism.



We will provide a series of concrete actions the Ministry will take and advocate for, prioritised in the immediate, medium, and long term, re-evaluated depending on the COVID-19 situation within Myanmar, neighbouring countries, and globally.

We recognise that tourism in Myanmar could be more inclusive. We aim to build a resilient tourism sector that allows and actively encourages entrepreneurship and growth of tourism-related MSMEs by promoting decentralisation of tourism management to destinations through a new system of Destination Management Organisations, removing barriers and protectionism in the existing structure, encouraging new demand driven product development that will see the growth of a vibrant sector that provides for the domestic as well as international markets.

We have ensured that tourism-related strategies and actions from the Myanmar Economic Recovery & Reform Plan¹ are included, as well as suggestions from the private sector in the White Paper: *Priorities for Restarting Tourism*² and key recommendations from the UNWTO, the World Travel and Tourism Council and the World Bank.

The impact of COVID-19 is not just about GDP or the economy: it is about our lives and livelihoods. The overriding imperative of our government is to safeguard people's lives and to safeguard their livelihoods by prioritising health and by supporting our people and businesses affected by lockdowns and loss of income.

¹ Ministry of Planning, Finance, and Industry (2020) The Myanmar Economic Recovery & Reform Plan. Draft 5.3 – October 8, 2020

² Myanmar Tourism Marketing et al: (2020). Tourism and COVID-19 in Myanmar. Priorities for Restarting Tourism, White Paper. (August 2020)

1.2 Roadmap Structure

This document is constructed of three main parts:

Where are we now?	A compact and focused situational analysis about tourism now and pre-COVID-19 in Myanmar, followed by an overall assessment of the potential economic and employment impacts caused by COVID-19.
What are our options?	What we know, what we don't know, what we assume about the current situation and possible scenarios that will affect our options.
Where are we heading?	Development of key Recovery Roadmap themes that lead into immediate, medium, and long-term action planning.

1.3 Our Vision of Tourism in Myanmar

- ◆ Tourism will be a major contributor to the national economy and support peace and socio-economic development of our people.
- ◆ Tourism will support the preservation of cultural heritage and enhance the natural environment for future generations by encouraging travel and sustainable and responsible management of natural resources.



2. WHERE ARE WE NOW?

2.1 Overview

Tourism globally is in crisis. As the COVID-19 pandemic lengthens, hopes of any re-opening of international tourism in 2020 have been dashed, and the longer the pandemic lasts, the deeper the impacts will be, and the longer it will take for recovery.

Myanmar did manage to have a reasonable season of international arrivals until March 2020, however, it is increasingly looking like there will be no 2020-21 season, and this is when impacts will be felt most, especially in the light of a new COVID-19 second wave.

The following months will be extremely difficult for Myanmar's tourism sector. Smaller operators may be able to survive due to lower operating costs, however the reality is all tourism sub-sectors will suffer from unemployment and potential closure during 2020-2021.

Another reality is the recovery of tourism globally and regionally is highly uncertain, which makes any kind of planning very challenging. Many studies exist, for example, PATA estimate that only 20% of international travellers who would have normally travelled over the next 12 months would consider to do so if COVID-19 conditions improve.

There may be an opportunity for growth within the domestic tourism sector, which has been emerging and growing significantly from virtually zero over the past decade.

During June and July 2020 some destinations were fully booked with local and expatriate visitors, and there is a strong case for further supporting the robust development of the domestic tourism sector.

The dynamic and spending power and type of the domestic traveller is quite different: the input of foreign currency is of course limited, as is the overall spending power. Domestic spending is also different and may not always use the existing international-market orientated businesses.

2.2 Previous Tourism Plans

Previous tourism plans in Myanmar have not always been as successful as they may have been as they have relied upon external organisations to provide non-committed financial and technical support for implementation.

Similarly, support from international development partner organisations has been sporadic and not systematic. Any future plans must face this reality and be designed for implementation by the Myanmar government.

2.3 Economic Snapshot

2.3.1 Global Outlook

According to UNWTO, the massive drop in international travel demand over the period January-June 2020 translates into a loss of 440 million international arrivals and about US\$ 460 billion in export revenues from international tourism. This is around five times the loss in international tourism receipts recorded in 2009 amid the global economic and financial crisis. International tourist arrivals plunged 93% in June when compared to 2019, with the latest data from the World Tourism Organization showing the severe impact COVID-19 has had on the sector. (UNWTO, 15 Sept 2020)

Millions of jobs are at risk across the sector. The downturn of tourism is likely to hit the vulnerable the hardest especially in countries like Myanmar where very many people are informal workers.

2.3.2 Gross Domestic Product (GDP)

In 2019, the **direct** contribution of the tourism sector to Myanmar's economy was MMK1,939bn or 1.6% of the country's total GDP while the total contribution (including the supply chain) was MMK5,337.2bn or 4.6% of GDP.³

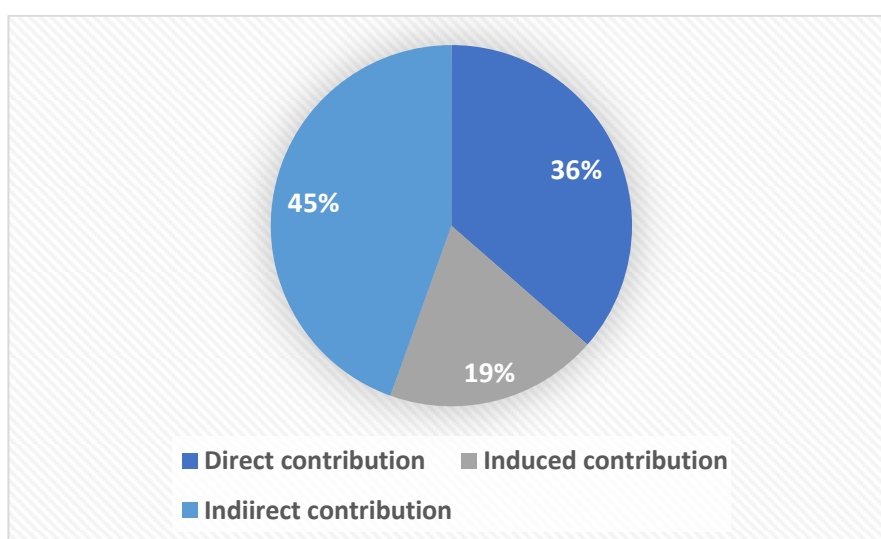


Figure 2: Myanmar - breakdown of travel & tourism's total contribution to GDP, 2019 (Source WTTC, 2020)

The World Bank⁴ estimates that Myanmar will see a contraction of GDP by 2.5% as the pandemic continues to hinder both domestic and global economic activities. Myanmar is unlikely to receive international tourists in 2020, and will miss the year's peak season for tourism. Tourism, transportation, manufacturing and retail will be the most affected sectors, facing a slower recovery as the world experiences a deep recession.

³ World Tourism & Travel Council (March 2020) Myanmar 2020 Annual Research: Key Highlights

⁴ World Bank Group (June 2020) Myanmar Economic Monitor

2.3.3 Myanmar business impact

Visitors started declining steeply from February and by July, the proportion of visitors decreased by 65% compared to the same period (January to July) in 2018 and 2019.

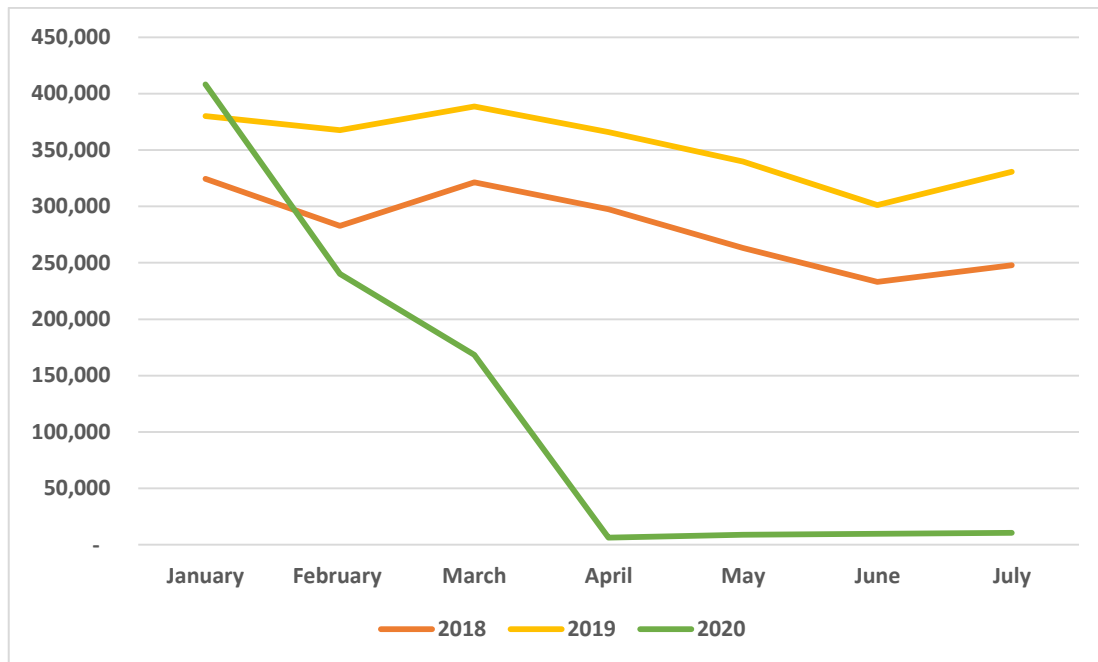


Figure 3: Total visitor arrivals (including border entry) from January-July 2018-2020 comparison

No one knows exactly what will happen with the tourism sector, but the current situation as shown in the diagram below shows that the sector has seen a big hit and all points to the fact that International tourism will take long to recover.

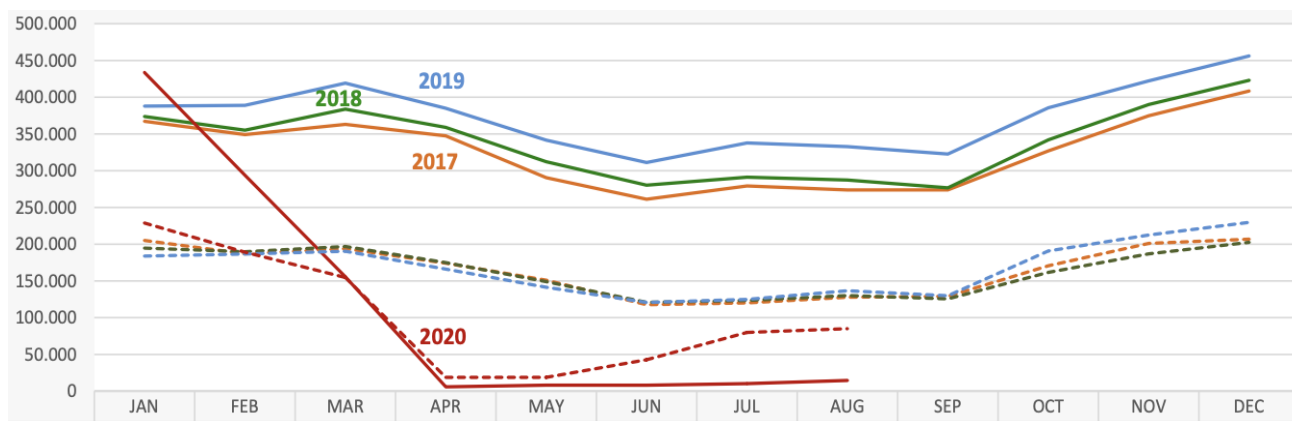


Figure 4: International arrivals in Yangon. Credit Yangon Airport. (Dotted lines are estimates).

UNWTO estimates a return to 2019 levels in terms of tourist arrivals would take between 2.5 to 4 years.⁵ For reference, tourism arrivals in Myanmar in 2019 is shown Table 1 below:

⁵ UNWTO (15 Sept 2020) International Tourist Numbers Down 65% In First Half Of 2020

Table 1: Tourism Arrivals to Myanmar 2019 (MOHT, 2020)

Entry Point	Number of Arrivals *	Length of Stay	Average Daily Expenditure	Total Expenditure
International Airports	1,792,353	11	\$130	\$2,563,064,790
Yangon (Cruise Ships)	8,701	3	\$141	\$3,680,523
Kawtaung (Yachts)	3,174	5	\$186	\$2,951,820
Border Gates (visa arrivals)	126,197	9	\$155	\$176,044,815
Border Gates (non-visa arrivals)	2,433,676	1	\$30	\$73,010,280

Hotel occupancy declined dramatically from March 2020 following government closure of hotels during a strict lockdown. Average occupancy of FDI and locally-owned hotels fell from nearly 36 percent in January to under three percent in April.⁶ Occupancy began rising again to around 15 percent in August after hotels applied for inspection and approval to open under health and safety guidelines from the MoHS and MoHT. However, a further outbreak of COVID-19 saw most hotels close, apart from those taking guests under government quarantine (Figure 5).

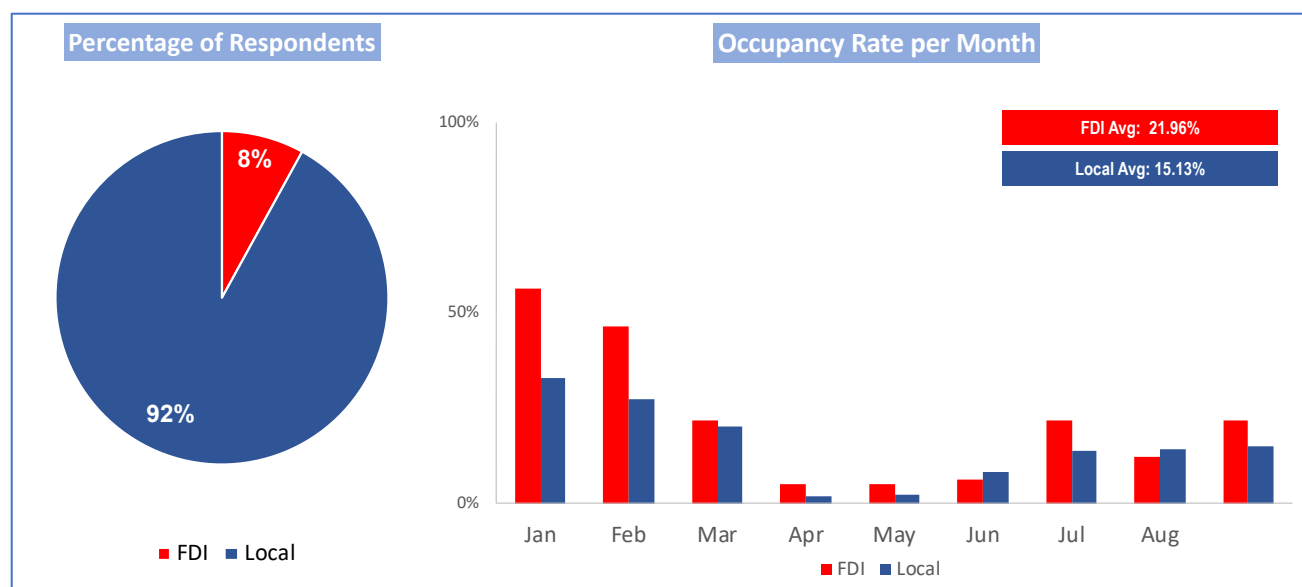


Figure 5: Myanmar Hotel Occupancy Rate Jan-Aug 2020

2.3.4 Employment

The tourism sector **directly** employed 346,000 people in 2019, accounting for 1.5% of total employment, while **total** employment across the tourism supply chain was approximately

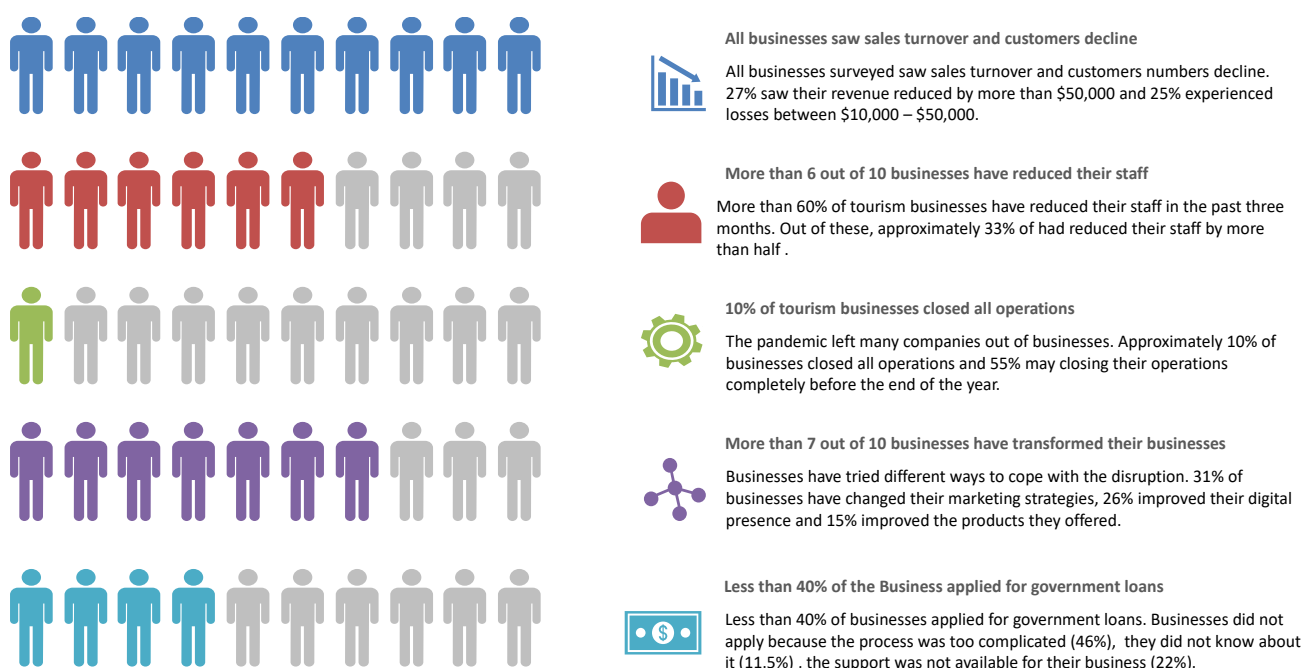
⁶ Myanmar Hotelier Association (2020) Survey of FDI and Locally Owned Hotels in Myanmar (September 2020)

1.07 Million.⁷ The pandemic has caused huge disruptions in sector-wide employment of workers. The International Labour Organisation⁸ estimates that 6.9 million to 7.3 million jobs in Myanmar could be disrupted during 2020. Disruptions may include unpaid leave, reduced earnings and working hours. This will cause hardship amongst unskilled and informal workers who have little job security or social benefits.

“Low-skilled, casual and temporary workers are likely to be the first to lose their jobs and may find it difficult in seeking employment in other sectors of the economy.” UNCTAD (2020) COVID-19 and Tourism - Assessing the Economic Consequences

A tourism impact survey (MOHT, June & September 2020) showed that approximately 69% of tourism MSMEs have reduced their staff numbers and approximately 19% of MSMEs have sent their staff on “leave” rather than let go. Main challenges faced by tourism businesses are set out in the table below:

Table 2: Impact on tourism MSMEs in Myanmar during April – September 2020



2.4 Infrastructure & Connectivity

According to the Asian Development Bank (ADB), Myanmar’s investment in infrastructure requires substantial investment to bring it up to the level of its nearest neighbours and address poverty.⁹ Tourism infrastructure and connectivity includes transportation systems, facilities, electricity, telecommunications and other utilities. These elements have been improving since 2012, starting from a low foundation.

Currently Myanmar's Special Economic Zones are located at Thilawa (Yangon), Dawei (Tanintharyi region) and Kyaukpu (Rakhine State) and linked with planned Chinese and Japanese rail and road projects which will traverse Myanmar to link Kyaukpu with Mandalay

⁷ World Tourism & Travel Council (March 2020) Myanmar 2020 Annual Research: Key Highlights

⁸ ILO 2020 ILO (2020) COVID-19 Impact on Employment and Labour Market in Myanmar

⁹ ADB (2014) Myanmar Unlocking the Potential Country Diagnostic Study.

and Thilawa and Dawei to Bangkok. Other trans-border road systems are also scheduled as part of the Greater Mekong Subregion transport integration strategy.

Roads need to be built and improved and the current antiquated rail system needs upgrading to handle passengers and goods. The road network requires modernisation with expansion of roadways into major tourist destinations.

Regional airports need upgrading to improve connectivity and airports in destinations require upgrading for international flights. Urban transport infrastructure in many destinations whether in local/commuter rail, road, bridges and alternative transport options, i.e. water-taxis and bus systems require updating and expanding.

Myanmar's telecommunications infrastructure also requires development. ITC calculated that another 10,000 additional towers are needed to provide Myanmar with full network coverage.¹⁰ Myanmar's power network also requires upgrading, lack of reliable 24-hour power connections significantly increase costs of doing business.

Support is needed for development of public-private partnerships (PPPs) across the tourism sector for infrastructure development. Improved coordination is required between stakeholders, including GoM, international donors, private sector companies (Myanmar and international investors). The launch of the Myanmar Tourism Bank (MTB) may also assist in providing access to credit for tourism stakeholders for infrastructure development.

2.5 Marketing & Communications

Currently MoHT employs a digital marketing team who produce content in nine languages and publish on the tourism.gov.mm website, as well as in Facebook pages. For inbound tourism, content is produced for social media in English (Facebook, Twitter, Instagram and LinkedIn). A digital strategy is being prepared to adapt the channels to the target market and a new marketing plan is being developed.

Before COVID-19, there was a focus on long-haul visitors from the USA and Europe who stayed for 10-12 days with high spending power. This will change due to travel restrictions with a new approach to domestic travellers in the short-term, and regional travellers once travel bubbles or air corridors are established.

The quality and content of social media posts and information requires careful language copyediting and relevant information for domestic travellers regarding transport, hotels and health requirements.

Myanmar must give confidence that COVID-19 control and safety measures are in place to create trust for both domestic and inbound travellers. Creative global marketing could attract wealthier and longer-stay travellers. To boost the domestic market the sector needs to adapt to the changing consumer behaviour of independent travellers and experience focused-tourists.

Marketing media must include more Myanmar language content and collaboration with key influencers. Marketing needs an improved strategic framework to include a channel strategy and personas along with better tracking of campaign results, also including economic metrics such as hotel bookings. It is important to collect and analyse data to measure the impact of campaigns to ensure the brand is strengthened and messages clearly communicated.

¹⁰ ITC (2014) ITC by Country Report Myanmar

2.6 Human Capital

Tourism is a diverse and labour-intensive activity which provides significant potential to create employment opportunities, improve household incomes and reduce poverty in Myanmar. One in four net new jobs created in Myanmar over the past five years were in the tourism sector, with tourism's contribution to employment at 1,073,500 direct, indirect and induced jobs in 2019 (4.8% of total employment).¹¹

The primary issues for Myanmar tourism are protecting jobs, providing skills for the new normal, and getting people back to work. The sector needs to ensure the future quality of trained people for tourism and hospitality that will be ready for tourism reset and the projected growth and the fulfilment of the GUOM vision of a high quality, service-oriented tourism sector.

Since the closure of training and education institutions due to COVID-19, teachers and students in Myanmar have been adapting to the situation where face-to-face classes are not permitted, and alternative methods of learning are needed. To address the closure of educational institutions, Myanmar has opted for multi-modal approaches that include high tech, low-tech and/or traditional paper-based dissemination. Challenges in developing and implementing remote online learning for technical subjects such as hospitality require more investment and piloting of new methods and curriculum as well as training of teachers to facilitate online classes.

National tourism occupational standards are under development for hospitality and tourism, with seven occupational areas – housekeeping, front office, food & beverage service, food production, spa, leisure and wellness, travel and tour operations and MICE (meetings, incentives, conferences and exhibitions). In total 55 standards should be completed in 2020 or early 2021, along with a system for Recognition of Prior Learning at levels 3-4 for experienced but unqualified workers.

Myanmar needs to strengthen tourism education and training yet many institutions involved in tourism training are in their infancy and under-resourced, making it difficult to deliver quality skills and knowledge and ensure trainees are competent when taking up jobs in hotels or other tourism businesses. The current tourism training landscape is beset with problems: shortages of qualified teachers; outdated 'theory based' curriculum and teaching methods; lack of practical training facilities, equipment and learning resources; student inability to pay the real cost of training; and, low public financial support.

To meet industry needs, tourism education and training providers require supportive government policies and investment in higher and TVET tourism education provision. Particular importance should be placed on capacity building for teachers and trainers, as well as support for curriculum development, teaching and learning resources, library materials and systems and provide access to tourism tertiary level education for women and ethnic nationalities from the States and Regions. The new National Education Strategic Plan (2021-30) is being developed by the Ministry of Education to address the challenges faced by Myanmar education and training.¹²

¹¹ World Travel & Tourism Council (2020), Myanmar 2020 Annual Research: Key Highlights (As reported in March 2020)

¹² MITV (2020) <https://www.myanmaritv.com/news/nesp-2021-2030-ministry-education-organizes-workshop>

2.7 Tourism Product Development

Myanmar is typically promoted as a destination of Buddhist culture, with its golden pagodas and ancient temples throughout the country, however, international visitors tend to attach more to human aspects of the country such as hospitality, friendliness and traditional ways-of-life of the people. Myanmar has great potential of improving tourism product development by promoting active and inclusive experiences, as well as those that celebrate rich ethnic cultures.

Poor connectivity caused by limited domestic air transport and road access, and inadequate infrastructure in the country, has led to the country’s tourism sector being centred around the traditional destinations of Yangon, Bagan, Mandalay, Inle Lake and Kyaikhtiyo (Golden Rock) and Ngapali beach. However, new destinations such as Hpa An, Kyaing Tong, Putao, Nagaland, Hakha and Natmataung in Chin state, and Kayah state have been developing over recent years.

Myanmar must invest in developing new tourism products, experiences, and activities, including sport, adventure, recreational, agrotourism, marine, culinary, wellness, MICE tourism, and so on. Better collaboration is needed with tourism businesses, conservation experts, and MoNREC to consider how Myanmar’s Protected Areas can be opened up for tourism in a way that promotes conservation. This will require the updating of the *Myanmar Ecotourism Policy and Management Strategy for Protected Areas 2015-25*.

Travelers, beyond Covid-19 will be looking for escapism, relaxation and wellness holidays so destinations that offer recreational tourism such as beaches, islands, resorts, spa and health facilities are likely to welcome back visitors first. A Domestic Tourism Survey conducted in September 2020¹³ asked the question: “What are your interests in selecting a destination.” More than 500 respondents indicated that people are looking for nature (72.5%), culture (59.2%), food (54.2%) and adventure (50.5%) travel.

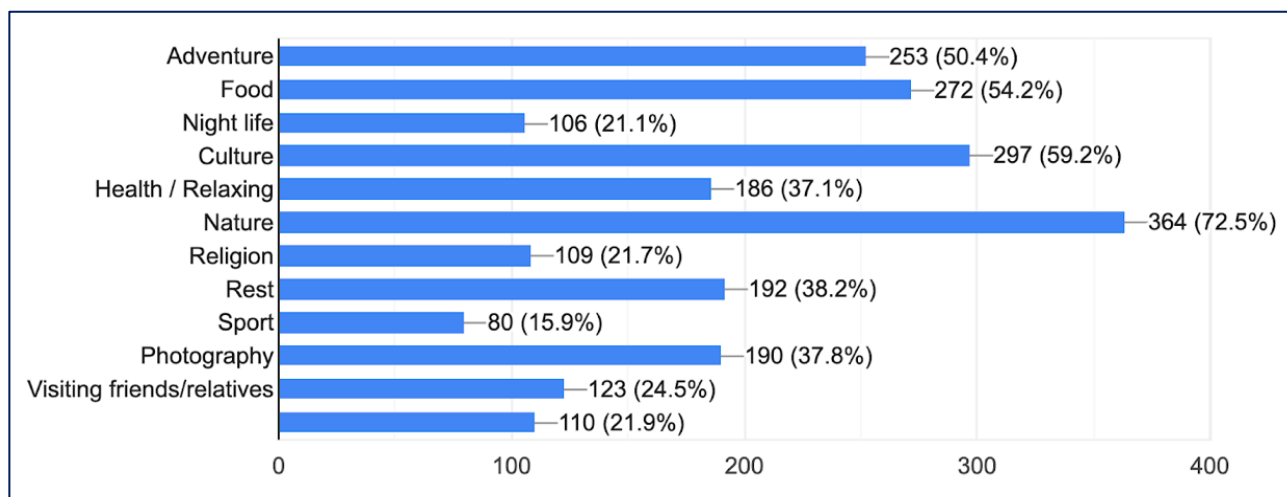


Figure 6: Domestic tourism priorities in 2020

The survey also asked, “What are the most challenging issues that you face when travelling in Myanmar.” Almost 500 respondents indicated that quality of service, price and lack of information were the most challenging issues they faced.

¹³ Myanmar Media Group (September 2020). Domestic Tourism Survey of 500 travellers in Myanmar

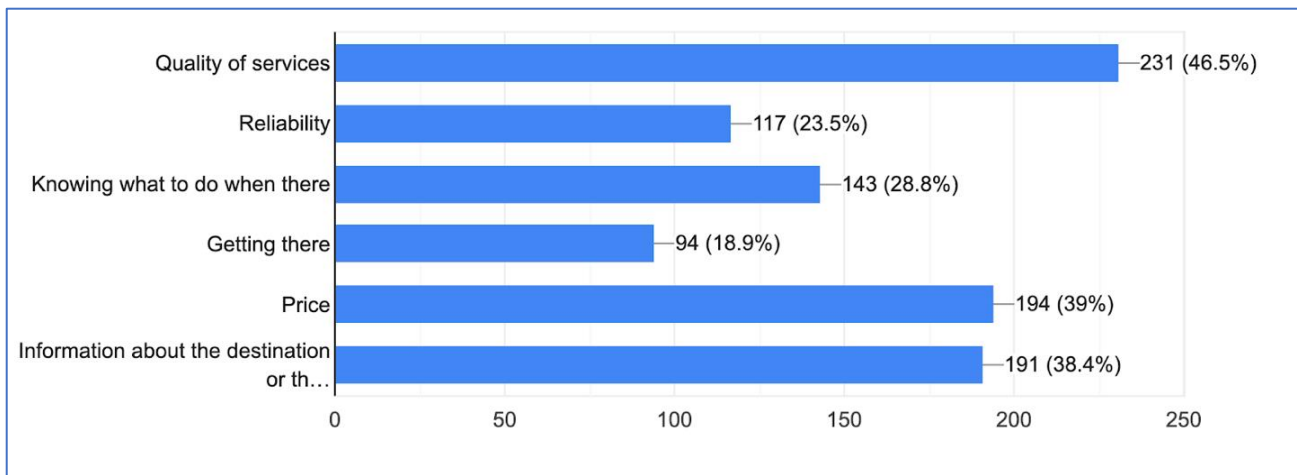


Figure 7: The most challenging issues faced by travellers in Myanmar

2.8 Environment & Sustainability

There is a need to secure sustainable livelihoods and long-term viability of Bagan, Inle Lake and Kyaikhtiyo as tourist destinations due to the environmental and social pressure from the effects of tourism.

The Myanmar environmental situation is in a critical stage as it has relied heavily on natural resource exploitation to sustain economic growth. Climate change, including sea-level rises, warming sea surface temperatures, saltwater intrusion in its river deltas, prolonged droughts, and the effects of shifting weather patterns on agriculture have affected the whole population to some degree.

Even in urban areas, people suffer from inadequate water supply, electricity shortages, poor drainage and sewerage, and solid waste disposal. The air quality of the country is also at high risk, as industrial and mining discharge, and urban waste brings increasing environmental health issues and brings the country additional pressures linked to solid waste generation.

Responsible and clear policy making and implementation of land-use planning has been lacking, with serious environmental and social problems emerging, which underpin the need for transparent and robust EIA and SIA systems to strengthen technical, legal, and financial capacities to reduce risk to local communities and mitigate the effects of climate change.

Cooperation between MoNREC, DICA, MoHT, and the private sector is needed for mapping and defining opportunities within Myanmar's protected areas. This includes the updating of the *Myanmar Ecotourism Policy and Management Strategy for Protected Areas 2015-25*.

The existing laws and bylaws need to be reviewed to manage the serious impact of the effects of infrastructure on natural environment and resources. There is a need to strengthen the regulatory framework to transform natural resource wealth into prosperity to provide employment, provide skills for local people to nurture domestic capacities, and to create and enhance services that drive industries and benefit supply chains.

2.9 SUMMARY

A SWOT/PESTLE FRAMEWORK

The SWOT analysis provides a context for Myanmar's internal and external tourism environment – strengths, weaknesses, opportunities and threats. PESTLE covers Political, Economic, Social, Technological, Legal and Environmental factors. The factors can be at macro and micro level. The process will underpin the next chapter on scenario planning.

PESTLE analysis asks which factors are of most importance now? Which are likely to be most important in a few years? What are the factors influencing any changes?

- ◆ Political: What are the key political drivers of relevance?
- ◆ Economic: What are the important economic factors?
- ◆ Social: What are the main societal and cultural aspects?
- ◆ Technological: What are current technology imperatives, changes and innovations?
- ◆ Legal: Current and impending legislation affecting the role
- ◆ Environmental: What are the environmental considerations, locally and further afield?

The combination of these tools is used to find out the current status and position of Myanmar tourism in relation to its external environment and contribution to the country. The analyses can then be used as a basis for future planning and strategic management.

STRENGTHS

- A strong Myanmar Brand
- Established flagship destinations
- Emerging destinations with very high potential
- Good capacity in the accommodation sector
- Good network of domestic airports and locally-owned carriers
- Improving road and other infrastructure
- Huge reductions in barriers for small businesses to enter the market

WEAKNESSES

- Comparatively higher and prohibitively uneven pricing for foreigners
- Issues especially related to conflict, land rights and construction
- Need of more coordination between MoHT and Regional Tourism Committees, and among stakeholder ministries
- Need of more effective and comprehensive data collection, analysis, and interpreted dissemination of results

OPPORTUNITIES

- Re-orientation to domestic tourism
- Promote expatriate tourism from Yangon and Mandalay
- Improved direct access between destinations and regional hubs
- Promote entrepreneurialism
- Promote better inclusion and local-level management and promotion of destinations

THREATS

- Uncertainty of COVID-19 related impacts and duration
- Huge re-opening marketing efforts from regional players like Thailand and Malaysia
- Uncertainty of the future of long-haul travel
- Destination management issues especially related to environmental management, quality, maintaining cultural heritage etc.

Figure 8: Myanmar Tourism Sector: Strengths, Weaknesses, Opportunities & Threats (2020)

PESTLE ANALYSIS

Table 3: Myanmar Tourism Sector: Political, Economic, Social, Technological, Legal & Environmental Analysis (2020)

<p>POLITICAL</p> <ul style="list-style-type: none"> ◆ Heavy involvement of MoHT in tourism affairs from strategic level down to the micro level ◆ Over regulation and interference in some cases ◆ Strong system of patronage and influence by big players have prevented small market entrants from participating in tourism: this has limited the spread and growth of tourism destinations ◆ Very complicated system of responsibilities of tourism management: various ministries are involved in key areas of tourism in Naypyitaw, GAD responsible for administration on the ground. ◆ Conflict limits growth of destinations and provides a negative image of Myanmar internationally
<p>ECONOMIC</p> <ul style="list-style-type: none"> ◆ Poor tax collection to fund tourism management ◆ Lack of capital for small entrants, and barriers to market entry (for example the requirement to have a minimum of 10 rooms for a guesthouse/20 for a hotel prevents small businesses entering the market)
<p>SOCIAL</p> <ul style="list-style-type: none"> ◆ Naturally welcoming and hospitable peoples ◆ Poor healthcare facilities keep Myanmar on the “at risk” list ◆ Young population ◆ Poor education system does not foster entrepreneurialism and is not always focused to the needs of the employment market
<p>TECHNOLOGICAL</p> <ul style="list-style-type: none"> ◆ Huge improvements in digital connectivity, banking, apps, and platforms for managing and marketing tourism ◆ Huge improvements in access to electricity, but may areas still do not have 24 hours electricity or water ◆ Barriers to market entrants based on new technologies, such as alternative building materials, solar power, etc. ◆ Innovation can be limited ◆ Lack of awareness/knowledge on accessing the international market
<p>LEGAL</p> <ul style="list-style-type: none"> ◆ New tourism law provides strong basis for improved management of destinations ◆ Establishment of State/Regional Tourism Committees improves local management ◆ Commitment to establish Township level DMOs an important step
<p>ENVIRONMENTAL</p> <ul style="list-style-type: none"> ◆ Significant risks of natural disaster and inconvenience related to monsoon and earthquake ◆ Long-term impacts of climate change in coastal areas, plus to the overall environment of the country ◆ Significant waste management issues country-wide

2.10 The way forward

Myanmar's tourism sector has focused traditionally on attracting the long-haul and package tourists, the segment that will be most hard hit in the coming years. Tourism experts and planners now consider a focus on domestic tourism will be the most resilient way for the tourism sector to adapt for the foreseeable future.

In such uncertain times, there is an opportunity to reconsider how tourism is managed in Myanmar, who manages it, and who it is managed for, linked to the on-going decentralisation process in the country. MoHT has been active in providing support to the sector where possible, including providing guidelines for the safe re-opening of tourism businesses.

Developments in tourism management are taking place at the same time with new Destination Management Organisations (DMOs) being formed at District and Township level. The first step, currently underway as a priority at time of writing, is developing DMOs across the country.

The role and function of the DMOs will be further developed over the coming months, but they are an important part of the government's commitment for decentralisation and managing local tourism issues at the local level.

Prospects for an inclusive, resilient and sustainable economic growth will depend on a range of factors that include the likelihood of new outbreaks of COVID-19, how well individuals observe health measures and restrictions, consumer and business confidence, and the extent to which government support to maintain jobs and help businesses succeeds in boosting demand.



3. WHAT ARE OUR OPTIONS?

To help us plan for our Recovery Roadmap, we first need to understand potential scenarios of how COVID-19 may affect the re-opening of tourism in our country, and what we do can mitigate short-term impacts and plan to make our tourism sector work better for us in the long-term.

We know that tourism's contribution to the economy will fall in the short-term, as long as international borders remain closed. We know that businesses will suffer in the short-term, and we will continue to support such businesses with our established relief programmes as much as our resources will allow. We also know that we will need to adapt to new markets, products, and a new way of thinking for our industry in the long-term.

Before we discuss the scenarios, first we consider some hard facts:

Current situation of the tourism sector - What do we know for sure?

- ◆ The overall size of the tourism sector, including contribution to economy, international arrivals, employment, and number of businesses operating will contract in the coming 12 months
- ◆ COVID-19 will limit international arrivals from tourism for many months
- ◆ Long-haul international arrivals will be the longest to recover - and may not fully recover as we know it for at least 5 years
- ◆ There will be an increasing demand for domestic tourism products in Myanmar that are tailored to the Myanmar domestic market, and to the resident expatriate market
- ◆ The government's main plan at time of writing to manage COVID-19 is containment
- ◆ A general global recession, as well as domestic job losses and insecurity will impact recovery
- ◆ There will likely be a phased re-opening of tourism: domestic then regional, followed by long-haul international
- ◆ We may have to adapt to live with COVID-19 rather than eradication
- ◆ Myanmar's tourism sector, both public and private sector has been oriented to international travellers in the past

Remaining uncertainties - What do we *not* know?

- ◆ How long the pandemic will last, when a vaccine may be found, and people's willingness to be vaccinated
- ◆ How COVID-19 impacts might affect people's willingness to travel in the long-term
- ◆ How large is the potential domestic market: meaning how many people travel for tourism, go to restaurants, and so on
- ◆ How is the domestic market segmented according to expenditure of tourism-related trips
- ◆ How some local areas in Myanmar may react to the opening up of tourism

- ◆ How people will react to a series of opening - lockdown - opening - lockdown
- ◆ How the travel insurance market will react to COVID-19-related insurance for travellers
- ◆ How changes to the aviation business model may affect ticket pricing
- ◆ How the private sector may react: some businesses may innovate, some may 'wait and see'
- ◆ How the domestic market may react upon regional reopening of travel

Underlying issues - What do we assume?

- ◆ There will be a demand in the short and longer-term for the travel and tourism market: people will still want to travel
- ◆ The initial traveller profile/dynamic will be different to the traditional markets
- ◆ The existing tourism sector in Myanmar will need to adapt to changes, innovate, and develop new products and models to survive
- ◆ There will be a contraction of traditional businesses, such as tour/travel agencies and tour guides
- ◆ Health and Safety procedures in tourism facilities will become normal for travellers
- ◆ Neighbouring countries will aggressively market themselves once regional/international travel reopens

What are the trends?

- ◆ A strong growth of hotel bookings in destinations such as Kalaw and Hpa An driven by social media
- ◆ Protectionism and 'unfavourable conditions' for start-ups stops the creation of new experiences at destinations and hampers innovation, which has led to Myanmar becoming uncompetitive with other regional destinations
- ◆ Traditional tourism businesses have found it difficult to adapt to the changing business environment
- ◆ Young people are becoming the domestic travellers with higher spending power and hunger for experiences and memories
- ◆ Instagram is used as an inspiration for what to do in destination or the reasons to go to a certain destination
- ◆ Perception of seasonality affects travel even for areas not affected by the monsoon

3.1 Changes in Consumer Behaviour & Sentiment

We must accept that in all scenarios, there will be a change in consumer behaviour and sentiment. Consumer behaviours are settling into a new normal, as people learn to live with the reality of COVID-19 and as more countries reopen parts of their economies. Although the pandemic’s impact has varied across regions, four themes have become evident among consumers across the globe:

<p>Cultural</p> <ul style="list-style-type: none"> ◆ There is an inherent desire for re-opening and to travel ◆ Travellers will likely seek new, nature-based activity and outdoor products ◆ Demand for COVID-safe experiences ◆ Less risk-averse people will travel first ◆ Travellers will seek meaningful travel experiences 	<p>Generational</p> <ul style="list-style-type: none"> ◆ Elderly travellers likely to be less willing to travel ◆ Families with younger children may not have the financial means to travel as much as before ◆ Younger travellers likely to be keen to travel, especially on shorter trips
<p>Focus</p> <ul style="list-style-type: none"> ◆ Health and Safety responses ◆ Short distance domestic travel ◆ Open spaces, adventure and nature ◆ Wellness travel ◆ Small group travel rather than mass tourism ◆ Digital reservations 	<p>Avoid</p> <ul style="list-style-type: none"> ◆ Big cities ◆ Crowded places ◆ Long-haul trips ◆ Areas with high COVID impacts

3.2 A new Myanmar tourist is emerging

As Myanmar focuses on re-opening its domestic tourism sector, the first priority will be to stimulate Myanmar residents to travel. The focus for domestic tourism has previously been on pilgrimage, with locations such as Golden Rock seeing annual visitors of more than 700,000. Additionally, annually Myanmar saw over half a million people travelling internationally. As borders have closed, there is a unique opportunity to attract these travellers to travel within Myanmar.

For example, in July 2020, Kalaw and Hpa-An saw big increases of bookings compared to 2019 with 40% of the bookings at 3-star hotels with an average booking value of US\$60, booked less than ten days in advance and an average of two nights' stay. Attracting the local tourist means understanding their interests and what triggers their behaviour. The newly emerging Myanmar domestic tourist is different than before. They are:

- ◆ Younger
- ◆ Experience seekers, wanting memories to share
- ◆ Influenced by social media and celebrities
- ◆ Digital natives
- ◆ Generally, not satisfied with the information available about destinations.

3.3 Recovery Scenario Planning for Myanmar Tourism

Scenario planning helps us consider our options, and how we will react. The following scenarios consider how we will plan our recovery roadmap. These are based upon extensive research of recovery planning from WTTC, UNWTO, World Bank, various recovery plans of other countries and regions, as well as consultation with the private sector, health officials, and our partners from other ministries, such as MoPFI, with the Myanmar Economic Recovery and Reform Plan (October 2020).

Decision-making regarding the country's reopening for international travel remains with the National Central Committee for Prevention, Control, and Treatment of COVID-19. Long-term planning related to tourism development remains with the National Tourism Development Central Committee. We will work together to ensure whatever the situation will be, we will focus on clear communication, working together to accept that we must adapt to build a resilient industry.

Scenario 1: Short-Term Recovery

After a period of stop-start openings and closures, localised outbreaks become more easily contained, and confidence returns to the domestic market, which in turn leads to a phased re-opening of regional, followed by international tourism.

The reality:

This seems less and less likely, especially after the second-wave of COVID-19 infections in August and September 2020: prior to this there was a steady recovery of the domestic market. Earlier scenarios that hoped for a reopening by the start of the 2020 high season did not happen.

Scenario 2: Hopes for Short-Term Recovery are Dashed

Stop-start openings and closures continue, reducing confidence for domestic travel in Myanmar, and reduces confidence for regional travel. Procedures and planning are not in place for COVID-19 safe travel, and the country is unprepared for potential re-opening, and the country loses its competitiveness. Neighbouring countries have re-opened for domestic tourism, and begin to re-open for regional and international markets.

The reality:

COVID-19 will likely continue to impact travel and tourism, and if no action is taken to prepare for COVID-19 safe travel, the outlook for the sector will be bleak, especially as neighbouring markets plan and adapt to the new normal of travel and become established as safe destinations.

Scenario 3: Long-Term Recovery

We begin to plan now for the long-term effects of COVID-19, building a resilient sector, based on clear communications, a compassionate approach to health and COVID-19 safe travel, and a strong domestic and regionally-focused tourism first, working on understanding changes in the tourism sector globally, and repositioning the country for the international market.

The reality:

We must now begin to plan and prepare for a long-term recovery. We can start with focusing on building a strong domestic tourism sector, with new and exciting demand-driven products, that are inclusive, locally managed, and support SME development. We begin to plan in detail to be ready for regional re-opening of tourism, seek safe travel bubbles, and plan for the long-term reorientation of our tourism industry to be safe, demand-driven, competitive, and inclusive.

3.4 Implications

We, the Ministry of Hotels and Tourism, will follow Scenario 3 and in order to plan for the immediate and long-term recovery of our tourism industry. This Recovery Roadmap will highlight what we will do in the immediate, medium, and long-term to ensure tourism recovers and thrives as a significant contributor to our economy and employment.

We recognise there are important structural issues that must be addressed to make tourism more inclusive, equitable, and improved in the long term, and we will take this opportunity to ensure tourism is more equitable, accessible by market entrants and entrepreneurs, managed better and more locally. We will encourage new product development, improved connectivity, allow for new destination development, and encourage all of Myanmar's peoples to benefit from a new approach to tourism.

Our imperative is to safeguard lives and protect livelihoods while safeguarding the future of our tourism industry and its people. This is expressed in the figure below.

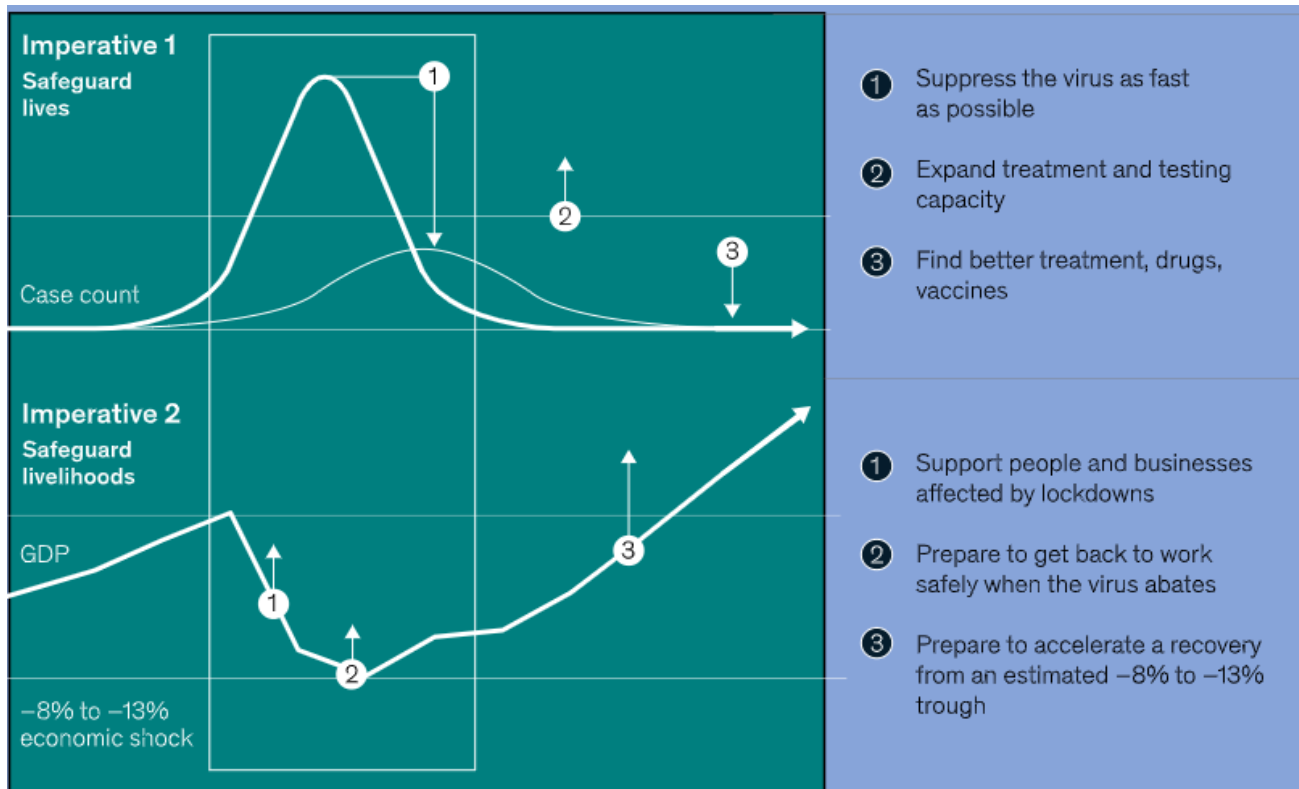


Figure 9: The imperative of our time (Source: adapted from McKinsey analysis in partnership with Oxford Economics)

3.5 Action Planning for Tourism Recovery

We now recognise that it may take up to 5 years for tourism to fully recover in Myanmar, especially with regard to international long-haul arrivals, and that the size, shape, and composition of Myanmar’s tourism sector in five years will likely be very different from that of 2019.

It is of course difficult to fully plan for how the tourism market internationally will change as well, however it is possible to consider how key actions can be prioritised, and be prepared as much as possible and to plan for the different scenarios, as well as other scenarios as they develop.

Therefore, we have developed strategies and actions based upon three priorities, all of which must be reviewed regularly and updated to ensure they maintain relevance:

Priorities	Actions	Outcomes	Focus
Immediate:	Managing the crisis and mitigating the impact	Restore confidence to boost and restart the domestic sector	Important and Urgent
Medium term:	Providing stimulus and accelerating recovery	Rebuild Visitor Demand and Improve Product Offerings	Important and not Urgent
Long term:	Preparing for the future	Develop a more resilient, balanced, responsible, and sustainable tourism sector	Longer term structural actions

The priorities are designed first to provide immediate and concrete actionable activities that can help Myanmar’s tourism sector through the 2020-2021 traditional high season, and try to make sure as much as possible, travel and tourism can still contribute to Myanmar’s economy and reduce impacts of unemployment.

Medium-term actions address some of the issues that affect innovation and entrepreneurialism in tourism development, and encourage businesses and the public sector to adapt to long-term change.

Long-term actions focus on tackling some of the more structural issues facing tourism development in Myanmar, for example local participation in destination management through DMOs, development of new destinations, planning for improved infrastructure, and so on. These planning actions can begin once the COVID-19 crisis has stabilised, and we know more about how COVID-19 will affect the tourism sector in the long-term.

As we are planning in a time of great uncertainty and events that will affect the long-term shape of tourism in Myanmar and globally, we will be adaptive to the inevitable changes in

scenarios that will develop. This plan will be reviewed and updated as the global situation changes, as well as the national phased re-opening of tourism, and as we understand more of how the pandemic affects travel realities domestically and worldwide.

3.6 Integrating key recovery recommendations

The following key publications have been analysed, and the recommendations included and aligned with the Myanmar Tourism Strategic Recovery Action plans which follow:

- ◆ Ministry of Planning, Finance & Industry, *Myanmar Economic, Recovery & Reform Plan*. (October 2020)
- ◆ Ministry of Hotels & Tourism: *Myanmar Tourism Master Plan outline 2021-2025*. (August 2020)
- ◆ World Tourism Organization (UNWTO): *Supporting Jobs and Economies Through Travel & Tourism* (May 2020)
- ◆ World Tourism Organization (UNWTO) *Covid-19 Tourism Recovery Technical Assistance Package* (May 2020)
- ◆ The World Bank: *Myanmar's Tourism Recovery and Development in the Aftermath of COVID-19* (Sept 2020)
- ◆ Myanmar Tourism Marketing et al: *Tourism and COVID-19 in Myanmar. Priorities for Restarting Tourism*, White Paper. (August 2020)

Myanmar Tourism Strategic Recovery Roadmap (MTSRR) 2020-2025

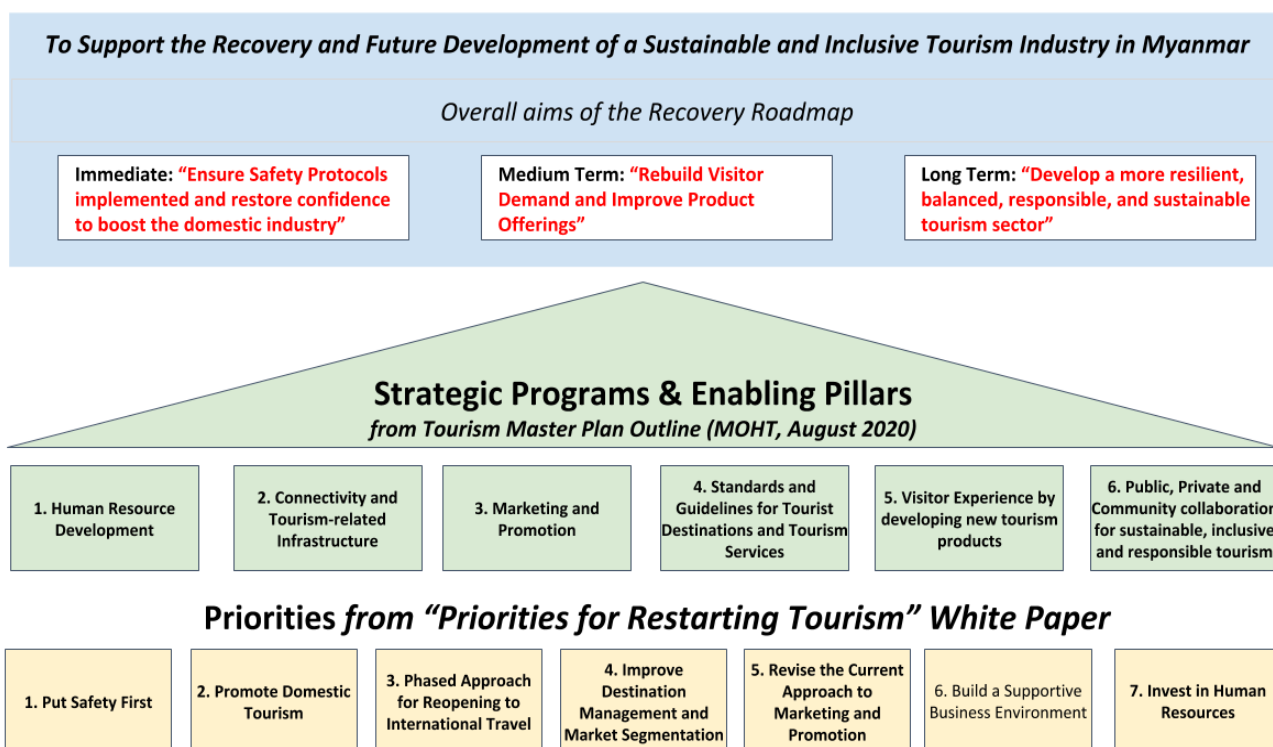


Figure 10: Chart showing the integration of Strategic Programs & Enabling Pillars (MoHT) and Priorities for Restarting Tourism (MTM)



4. THE MYANMAR TOURISM STRATEGIC RECOVERY ROADMAP

4.1 Mission

To provide a response to COVID-19 aligned with UNWTO recovery recommendations, based on Myanmar Tourism Master Plan outline leading to recovery and future development of a sustainable and inclusive tourism sector in Myanmar

4.2 Goals

Immediate	Restore confidence to boost and restart the domestic tourism sector
Medium Term	Rebuild Visitor Demand and Improve Product Offerings
Long term	Develop a more resilient, balanced, responsible, and sustainable tourism sector

Restore confidence to boost and restart the domestic tourism sector (Immediate)

1. Enhance health and safety protocols to generate trust in Myanmar as a safe destination
2. Continue economic support to MSMEs and individuals in the tourism sector
3. Reassure and inspire the public to travel again and explore new experiences
4. Re-align tourism destinations to "the new normal"
5. Develop Human Resource Capacity and strengthen skills and knowledge for the new normal

Rebuild Visitor Demand and Improve Product Offerings (Medium Term)

6. Establish Myanmar as a trusted and safe destination
7. Position Myanmar in the heart and minds of International travellers
8. Diversify the tourism product base, improve quality and strengthen protected areas
9. Support MSMEs through digitisation, tourism investments and technical assistance
10. Set national tourism standards, ensure access to learning and create new tourism jobs
11. Develop destination management strategies, standards and guidelines for DMOs

Develop a more resilient, balanced, responsible, and sustainable tourism sector (Long Term)

12. Establish A Smart Tourism Ecosystem and digital infrastructure
13. Establish a "Myanmar Tourism Board" for coordination of Marketing & Communication activities
14. Strengthen tourism human capital by establishing pathways to higher education and by updating the national HRD Strategy
15. Improve tourism connectivity and accessibility
16. Ensure destination management is inclusive and in consultation with local stakeholders
17. Invest in developing and expanding the scope of Inclusive and Community-Based Tourism
18. Safeguard tourism resources and prevent negative impacts on social and natural environment

Goal: Immediate - Restore confidence to boost and restart the domestic tourism sector

Strategy 1: Enhance health and safety protocols to generate trust in Myanmar as a safe destination

We will ensure hospitality and tourism businesses are implementing health & safety protocols and provide clear guidelines and protocols to ensure consistency to give travellers confidence to travel in Myanmar.

The Ministry will aim to ensure hospitality and tourism businesses are implementing health & safety protocols for all tourism businesses. We will prepare clear guidelines, protocols and procedures for tourism and hospitality businesses including transport companies, vendors and others to ensure consistency and to give travellers confidence in Myanmar and local destinations as COVID-safe.

We will establish monitoring and inspection visits to ensure businesses are implementing protocols and support MSMEs to be able to offer online reservations for accommodation, travel and activities at tourist destinations. In addition, we will support MSMEs by promoting apps and software for them to be able to offer online bookings and consider funding for MSMEs to set up online reservation systems.

We will also work with the Ministry of Health and Sport to consider introducing the contact tracing app scheme through Google & Apple. We will get cabinet approval for Myanmar to apply to join the global contact tracing scheme and introduce and promote the scheme to people in Myanmar.

We will improve our statistical systems and move towards research-based decision-making in order to provide the public and the industry up to date information on immediate and changing trends and events regarding health, safety and travel. The MoHT Research Department will work closely with other relevant departments to provide support and ensure informed decision-making processes.

We will review with MOHS the availability of health insurance policies and health certificates for domestic travellers. We will work with industry and MoHS to establish emergency response teams and qualified first aid personnel in licensed hotels or other accommodation. We will also develop a Travelpass system to enable short-term cross-border travel.

Strategy 2: Continue economic support to MSMEs and individuals in the tourism sector

We will continue to provide economic support to our tourism businesses. We will work to remove barriers for entrepreneurs to allow small, local businesses to innovate, we will also make sure that licenses for creative product developments by small market entrants are fast-tracked.

The Ministry will begin an immediate review of the barriers to market access for small entrepreneurs and review existing tourism regulations which are protectionist and in favour of big business in order to encourage market diversity and allow greater involvement in tourism by all citizens. We will encourage innovation and inclusiveness in all tourism businesses and enable fast track licencing processes for small businesses.

We will commit to continuing to support tourism businesses within our resources, as survival of MSMEs requires the continued financial support by the government. We will consider relaxation and deferral of taxes and revising of leasing rates for state owned hotels and seek to provide a second round of loans for MSMEs which have not received previous support.

Financial support for informal grassroot workers will be sought through cash for work and cash for education programmes. Additionally, we will work with financial institutions to facilitate innovative and unconventional means of finance for MSMEs. We will also Explore opportunities to reorganise larger businesses via mergers and acquisitions.

Strategy 3: Reassure and inspire the public to travel again and explore new experiences

We will ensure marketing and communication activities are done to build confidence that it is safe to travel and to boost the domestic market.

The Ministry will seek to improve the communication to the public and provide relevant information to potential travellers with a focus on empathy, reassurance and connection in order to build confidence that it is safe to travel and to boost the domestic market. We will ensure the information people need is available on our website and other media.

We will establish data collection and sharing of insight across ministries and the private sector to provide a clear picture of the market and who the traveller is, and also make it possible to assess the impact of different marketing campaigns. We will improve data communication methods so the industry is fully informed of trends.

The Ministry will prioritise promotion of domestic destinations and attractions focused on the domestic traveller's needs. Campaigns will be created to encourage "In city" activities such as culinary tourism, nearby activities such as resorts and parks, and countrywide travel for longer stays. Programmes and campaigns will be created in cooperation with the private sector, with messages tailored to the interests and behaviour of the domestic tourist such as campaigns focused on Nature, Culture, Adventure and Food.

Our marketing will refocus on storytelling and branding instead of the product offered so that marketing focuses on good quality content rather than quantity for the main destinations. We will support the training of DMOs in branding and communication as they are developed and visitors will be encouraged to share their stories and experiences. We will identify and work with social influencers to reach a wider audience and will use user generated content to reach a wider audience.

Strategy 4: Re-align tourism destinations to the new normal

We will actively support the development of new, local destinations, targeted to recreational and domestic travellers. We commit to removing barriers for new domestic-focused products, such as campsites, nature recreation areas, and so on, and encourage the private sector to take the lead whilst ensuring environmental safeguards.

The Ministry will seek to enhance visitor experience by actively supporting the development of new and innovative domestic-focused destinations, making them more appealing to the

domestic market. We will encourage and support the private sector to develop and promote new products & experiences targeted at individual & small groups travellers.

We will improve the quality of existing tourism products and services and will encourage all existing destinations to identify and assess immediate improvements to quality of provision in the short term. We will ensure that information and support is available for individual travellers and will work with our Regional Departments and RTCs to improve the information available about destinations through improving our existing websites and Facebook pages.

We will also work with our new system of DMOs to ensure they work together to share knowledge and resources where appropriate (for example in neighbouring destinations), and investigate how CSR can support the development of rural tourism.

Strategy 5: Develop Human Resource Capacity and strengthen skills and knowledge for the new normal

We will ensure COVID-19 ready training for hospitality and tourism employees is available in major destinations.

The Ministry will continue to provide COVID-19 business reopening training for front line staff from hotels, restaurants, transport and other tourism organisations in health, safety and business readiness. We will also provide refresher training for existing tourism professionals in technical skills to prepare them for restart of tourism and encourage the development and use of online or blended learning for hospitality professionals out of work or on furlough. Additionally, we will seek to provide COVID-19 resilience capacity building for tourism-related grassroots personnel such as boat, trishaw, taxi and horse cart drivers.

We will conduct a training needs analysis to prioritise essential training skills for MoHT personnel in the State and Regions to support tourism in Myanmar. We will focus on developing training for staff to conduct Covid-19 inspections to ensure uniformity and spot-checks in tourism facilities and to identify and respond to immediate and key training needs for MoHT staff and managers in the States & Regions.

We will also develop a functional based capacity building training programme for DMOs to support their development in the short term.

Goal: Medium Term - Rebuild Visitor Demand and Improve Product Offerings

Strategy 6: Establish Myanmar as a trusted and safe destination

We will align the criteria of the UNWTO into our strategic policy to develop travel safe accreditation systems, and provide regular, updated information, instructions and alerts in accessible, easy-to-read and clear language formats.

The Ministry will establish and communicate clear policies and procedures for international travel and will work with relevant authorities to improve visa-free access to the country. We will introduce and increase the number of countries eligible for visa waiver including visitors

entering the country through the land borders and setup clear communication channels and easy access to consistent information and news to reassure and inform travellers.

We will consider the benefits of issuing a COVID-19 passport for both inbound travellers and be ready for COVID-safe international arrivals once borders reopen. A COVID-19 passport credential issued after immunization has been confirmed will ensure travellers/ individuals can provide a verifiable proof of immunization when they travel throughout the country. We will work with appropriate Ministries to ensure processing and verification is handled professionally and quickly at points of entry to Myanmar and encourage visitors to download and use a traceable application for their entire stay in Myanmar. As part of this we will aim to introduce an MoHT 'Safe Service' brand.

We will explore the feasibility of issuing travel passes to enable short-term cross-border travel for important business and official purposes between 'travel bridge' countries, up to a maximum of 14 days' stay and we will work with an external agency to develop a travel safe accreditation system that rewards tourism organisations that set a standard for health and safety for travellers (such as the WTTC 'Safe Travels': Global Protocols & Stamp for the New Normal).

Strategy 7: Position Myanmar in the heart and minds of International travellers

As regional travel restrictions are being lifted, markets open up again, and international travel intent and consumer confidence are growing, our objective is to increase demand for holidays to Myanmar.

The Ministry will build brand awareness campaigns in selected target markets and develop videos for the target markets to connect on an emotional and inspirational level in different languages (Chinese, Thai, Japanese, Korean, English).

We will utilise relevant digital channels for marketing and communication for the different target markets and for each target market we will develop an integrated marketing plan with defined personas together with channel and content strategies to ensure more targeted reach.

We will conduct public relations activities to promote Myanmar as a safe (from COVID-19 and conflicts) and attractive destination to visit through different media outlets, providing different voices of confidence to international tourists to visit Myanmar. We will plan a *Visit Myanmar Year* together with the private sector.

We will develop Virtual Tours offered through Virtual Reality to make visitors aware of Myanmar and help them decide to visit by setting up an official collaboration with Google Maps or Facebook to leverage their existing user base. We will also promote Myanmar as an attractive location for branded video and movie filming and encourage movies to be made in Myanmar.

In coordination with the entire sector, we will plan for a 'Visit Myanmar 'Year, tentatively for 2023.

Strategy 8: Diversify the tourism product base, improve quality and strengthen protected areas by enhancing connectivity

We will develop Myanmar's image as an exciting and action-oriented destination, whilst

strengthening and celebrating our diverse cultures, landscapes, and ensure our protected areas are sensitively developed for tourism.

The Ministry will develop new tourism products with the focus on product diversification. We will strongly promote destinations and encourage the private sector to develop new types of tourism and recreation products, specifically focusing on sport and adventure tourism.

We will actively promote and provide incentives for new products and services such as bungee jumping, ziplining, canoeing, rafting, abseiling, paragliding and rock climbing, developing safety operating standards to comply with industry standards.

We will promote Myanmar's existing sports facilities (in Naypyitaw especially), and provide incentives for international sporting events such as ultra-marathons, endurance cycling, and so on to be held in the country.

We will promote interactive experiences as the core of destination's services to increase value by promoting festivals, hiking opportunities at rural areas and gastronomic/culinary tourism. We will enhance visitors' experience at CBT sites by adding herbal medicine, ethnic art, craft and performances, organic farming and cooking authentic ethnic cuisine.

We will push to remove dual-pricing of domestic airlines to encourage expatriate residents to travel internally in Myanmar, and reduce the cost of travel for international visitors once Myanmar's borders are opened. We will discuss dual pricing with airlines, and highlight the cost of domestic air travel as a significant barrier to international visitors.

We will leverage Myanmar's unique attractions such as an untouched archipelago in the south and Himalayan mountains in the north. We will review the Myanmar Ecotourism Policy and Management Strategy for Protected Areas 2015- 2025 to focus on broader tourism management for protected areas and ensure our Protected Areas are sensitively and appropriately developed for tourism.

Strategy 9: Support MSMEs through digitisation, tourism investments, technical and HRD assistance

We see digital transformation as a necessity for the survival of tourism businesses: we will support MSMEs through provision of training on digital literacy, loans and ensure the licencing procedures and taxation of new and existing tech start-ups are relaxed.

The Ministry will establish a fast-track approval system for new tourism MSMEs and approve tourism-related investments with minimum bureaucracy, giving priority to innovative micro, small and medium enterprises. We will implement digital systems for all tourism standard business procedures, promote online payments to reduce red-tape, improve efficiency and minimize in-person contacts.

We will strengthen tourism-related supply chains and improve linkages between local producers and the tourism sector as well as expanding access to tourism supply chains for local producers and service providers. We will reorient the value chain processes for the sustainability of tourism-related micro, small and medium enterprises (MSMEs) including hospitality and travel businesses such as transport companies, boat companies and others.

We will create easier access for MSMEs to gain vocational training, microfinance, value chain connections, business support services, market linkages, etc and provide technical assistance and capacity building to maximize tourism's contribution to employment and income generation. We will encourage MSMEs to share their efforts and expertise in

tourism product development, marketing and promotional activities. We will also investigate setting up a tourism focused financing institution, based on international best practice.

Strategy 10: Set national tourism standards, ensure access to learning and create new tourism jobs

We will develop common curriculum national qualifications based on Myanmar Tourism Occupational Competency Standards. This will lead to a consistent national tourism curriculum in public and private training and educational institutions endorsed by the Ministry, in alignment with National Tourism Occupational Competency Standards and the ASEAN Tourism Professionals Registration System (ATPRS).

The Ministry will support the development of a national tourism curriculum and new tourism qualifications based on National Tourism Occupational Competency Standards. We will support the development of common curriculum and the implementation of a national tourism curriculum in public and private educational institutions.

We will establish a national system for delivery of Hotel and Tourism Occupational Competency Standards and ensure assessment and certification is in alignment with National Tourism Occupational Competency Standards and recognised by the ASEAN Tourism Professionals Registration System (ATPRS).

We will seek to establish assessment centres in States and Regions to train the workforce and provide assessment and certification of qualified workers and promote national standards to the sector for use for HR and quality and to the private training institutions and encourage them to register as assessment centres. We will commission an internal Competency-based HRM system for MoHT.

We will ensure greater access to tourism vocational education for everyone and collaborate with MoE/DTVET to ensure tourism vocational educational opportunities are available to all people in Myanmar. We will encourage training schools to offer scholarships for disadvantaged youth and women from ethnic nationalities, and work with the private sector to develop job creation programmes in States and Regions.

Strategy 11: Develop destination management strategies, standards and guidelines for DMOs

We will commit to supporting the decentralization of tourism and support the local decision making and management of new and existing destinations through the development of accountable and democratic Destination Management Organisations (DMOs), led by the Pyithu Hluttaw MP responsible for the destination. This will lead to inclusive destinations that are managed through inputs from all citizens, as well as the tourism-related private sector. It will also better equip local decision making for new destination development, infrastructure priorities and encourage local entrepreneurship.

The Ministry will continue to develop DMOs to ensure inclusive input from Township/District level with a clear strategy for DMO composition, roles and function, and how they are overseen by RTCs and the Ministry. We support the principle that tourism is managed at the local level, by the local level, transparently and inclusively, that local innovation and employment is promoted to support new destination development.

We will develop and encourage DMOs to operate as locally-based institutions with well-trained and motivated full-time staff to oversee governance, financial planning and implementation in conjunction with relevant organisations, including the business sector

and development partners. We will support the development of a long-term financial and capacity building programme for DMOs.

We will develop common standards and guidelines to oversee DMOs and expand and upscale the skills and capability in community-based (rural, agri and protected areas) tourism. The aim will be for each DMO to develop functional Destination Management Plans, following suitable Destination Management Planning models.

We will seek to strengthen the sector's ability to weather future storms and educate stakeholders about the new normal themes for sustainable development as well as encourage the private sector to innovate new products, and seek support from development partners for CBT products at the destination level.

Goal: Long Term - Develop a more resilient, balanced, responsible, and sustainable tourism sector

Strategy 12: Establish A Smart Tourism Ecosystem and digital infrastructure

We aim to have a Smart Tourism Ecosystem that collects and distributes relevant data that can support destination planning and includes all digital players and technologies in a sustainable way.

The Ministry will develop, implement and support digital Infrastructure for the emerging destinations in cooperation with OTAs, online tourism related suppliers, and the banking sector to understand the consumer behavioural changes and trends on product preferences to connect stakeholders and digital players for automatic information and data gathering.

We will support the use of digital service and provide digital literacy training to the industry to help local MSMEs adapt to the use of digital service and tools and to find the skills and solutions to manage and analyse the big data collected through the industry collaborations.

Strategy 13: Establish a Myanmar Tourism Board for coordination of Marketing & Communication activities

We recognise that an independent Tourism Board is an important part of a collaborative tourism sector where marketing funds and activities can be managed centrally and coordinated with DMOs.

The Ministry will establish an independent body to coordinate marketing and promotions in order to be competitive in the long-term. We will set up a structure so that marketing activities and funds for marketing and tourism promotions are centrally managed and coordinated with the whole sector.

We will also source new content ideas from each DMO once established, creating access to a wider range of relevant quality content and develop a capacity-building programme on the development of DMOs to include marketing and coordination of new product ideas.

Strategy 14: Strengthen tourism human capital by establishing pathways to higher education and by updating the national HRD Strategy

We will strive to develop Myanmar's talent in order to develop a vibrant, sustainable, culturally sensitive, inclusive, and well managed tourism sector.

The Ministry will review and update the *National Tourism Human Resource Development Strategy (2017)* to guide and plan for future tourism growth, ensure a skilled and qualified workforce and to ensure quality of tourism education and training.

We will identify suitable universities in North and South of the country to develop curriculum and gain accreditation from the government leading to the development of Master's and higher academic programmes in Tourism & Hospitality Management. We will also seek support or partnerships from international Universities to develop internationally recognised/accredited tourism and hospitality programmes.

Strategy 15: Improve tourism connectivity and accessibility

We commit to take both a long-term perspective on advocating for resources to develop high quality tourism and transport infrastructure that can be accessed by all citizens, and a short-term view on reducing the cost of travel to be more in line with our neighbouring countries, whilst safeguarding our domestic airlines and transport operators. In the long-term we will seek to re-develop and upgrade our rail network for both tourism and the benefit of low-carbon trade and travel for all. We will prioritise infrastructure spending where it has most impact.

The Ministry will work with the Department of Civil Aviation and domestic airlines to upgrade selected airports and improve linkages with international airlines to smooth international to domestic air connections at Yangon, Mandalay, and Naypyitaw International Airports in order to enhance customer experience and improve access to destinations. We will develop reciprocal arrangements between domestic and third-country airlines to open up new international air routes.

We will collaborate with DCA to improve safety and equipment of domestic and international airports and continue to focus on improvements of safety, health and security of air travel to improve consumer confidence in safety and security equipment.

We will work with State and Region Tourism Development Committees and/or DMOs as they are developed to identify key jetties and other tourism-related water transport infrastructure for upgrading and re-development and to provide waterway connections and better facilities for river cruises and boat trips.

We will work with the Ministry of Transport to improve road access to major destinations and new destinations and to rejuvenate key railway lines, protect historical railway heritage, and encourage private sector development for rail tours carriages.

Strategy 16: Ensure destination management is inclusive and in consultation with local stakeholders

We will work to ensure our communities benefit from better tourism management of destinations.

The Ministry will work with local communities and DMOs to improve tourism-related small-scale infrastructure such as roadside maps, signage, information counters and public toilets.

We will enable access to rural and community-led destinations and promote new and potential destinations by engaging with local businesses and facilitating linkages to strengthen the sustainability of destinations in an all-inclusive tourism infrastructure framework. This aims to ensure the tourism sector supports the government's goal to deliver a major upgrade to Myanmar's infrastructure.

We will also work with RTCs and DMOs to improve comprehensive and long-term solutions to environmental and Waste Management infrastructure in the destinations.

Strategy 17: Invest in developing and expanding the scope of Inclusive and Community-Based Tourism

We will strive to encourage destinations to grow and flourish by encouraging a much wider participation in the tourism sector, promoting growth in rural, agricultural, and cultural tourism whilst ensuring environmental, community, and cultural safeguards.

The Ministry will invest in, and encourage the growth of community-inclusive tourism in rural, agricultural, and protected areas. We aim to reduce government bureaucracy and implement simplified regulations for Bed and Breakfast, Homestays and alternative types of accommodation based on demand. We will also modify vehicle licenses for communities to use for visitors and encourage PPPs to ensure sustainability for new and existing remote Community-based Tourism sites.

We will encourage handicrafts and organic food production and educate local farmers to develop agrotourism in rural areas and ensure there is both market demand and genuine interest by communities to be involved with tourism, with safeguards in place to prevent community exploitation, land issues, and environmental protection.

Strategy 18: Safeguard tourism resources and prevent negative impacts on social and natural environment

We will establish a means to ensure sustainability of tourism products, resources and tourism destinations in Myanmar. We will protect vulnerable communities and indigenous people's areas from negative impacts of tourism, whilst seeking to improve linkages between local producers and the tourism sector.

The Ministry will work with our partner Ministries, private sector businesses, and local communities to prevent negative impacts on the social and natural environment. We will improve environmental conservation including waste management and the use of recycled products in destinations and promote awareness and knowledge of climate change integrated in environment, tourism, land use and forest policy and laws, and so on.

We will strengthen and enhance the management of historic heritage, authentic culture, traditions and distinctiveness of host communities and seek to maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.

We will ensure that tourism related activities remain transparent with regard to land use and ownership, with RTCs publicly sharing licence applications, decisions, and so on.

We will establish protocols to be developed for all new tourism developments and land-use re-assignments to be subject to honest and professional Environmental and Social Impact Assessments based on size and type of investment.

We will establish a long-term planning system to ensure new tourism buildings and related infrastructure are in-line with regional/local styles and maintain unique styles of towns, villages, and buildings to preserve Myanmar's unique tourism identity. We will also encourage the re-use of heritage buildings for tourism purposes.



5 DETAILED ACTION PLANNING

5.1 Immediate Actions

Goal: Immediate - Restore confidence to boost and restart the domestic tourism sector		
Strategy 1: Enhance health and safety protocols to generate trust in Myanmar as a safe destination <i>We will ensure hospitality and tourism businesses are implementing health & safety protocols and provide clear guidelines and protocols to ensure consistency to give travellers confidence to travel in Myanmar.</i>		MoHT Strategic Program: 4 UNWTO Pillar: 3 UNWTO Recommendation: 4 World Bank Recommendation: B, D White Paper Priority: 1
Action	Details	Lead
1.1 Ensure hospitality and tourism businesses are implementing health & safety protocols	<ul style="list-style-type: none"> Prepare clear guidelines, protocols and procedures for tourism and hospitality businesses to ensure consistency and to give travellers confidence in Myanmar and local destinations as COVID-19 safe Establish monitoring and inspection visits to ensure businesses are implementing protocols. Review with MoHS the availability of health insurance policies and health certificates for domestic travellers. Work with industry and MoHS to establish emergency response teams and qualified first aid personnel in licensed hotels or other accommodation 	MoHT to coordinate with MoHS and RTCs
1.2 Support MSMEs to be able to offer online reservations for accommodation, travel and activities at tourist destinations	<ul style="list-style-type: none"> Support MSMEs by promoting apps and software for them to be able to offer online bookings Support MSMEs to setup online reservation systems 	MoHT to seek support from Private Sector/Development Organisations
1.3 Introduce COVID-19 contact tracing scheme with Google & Apple applications	<ul style="list-style-type: none"> Apply to join the global contact tracing scheme & introduce to Myanmar 	MoHT to coordinate with MoHS and NTDCC
1.4 Improve statistical systems in order to provide the public with up to date	<ul style="list-style-type: none"> The MoHT Research Team will work closely with other relevant departments to provide up to date information based on research-based decision making 	MoHT to coordinate with key Ministries and private sector

information on health, safety and travel	<ul style="list-style-type: none"> Better statistical and real-time data will be used from a variety of public and private sector sources to inform the industry of immediate and changing trends and events regarding health, safety and travel 	
1.5 Issue Travelpass to enable short-term cross-border travel	<ul style="list-style-type: none"> A Travelpass for important business and official purposes between neighbouring/bubble countries, up to a maximum of 14 days' stay Travellers with Travel pass need to undergo pre-departure and approved post-arrival COVID-19 PCR tests, abide by a pre-declared controlled itinerary during their visit and download and use Traceable Applications (Saw Saw Shar or similar) for their entire period of stay 	MoHT to coordinate with key Ministries
<p>Strategy 2: Continue economic support to MSMEs and individuals in the tourism sector</p> <p><i>We will continue to provide economic support to our tourism businesses. We will work to remove barriers for entrepreneurs to allow small, local businesses to innovate, we will also make sure that licenses for creative product developments by small market entrants are fast-tracked.</i></p>		<p>MERRP Action Plan 8.3 MoHT Strategic Program: 5,6 UNWTO Pillar: 1 UNWTO Recommendation: 1, 2,3,8,9 World Bank Recommendation: A,B White Paper Priority: 6</p>
Action	Details	Lead
2.1 Begin an immediate review of the barriers to market access for small entrepreneurs	<ul style="list-style-type: none"> The existing tourism regulations are protectionist and in favour of big business Review existing regulations to encourage market diversity and allow greater involvement in tourism by all citizens Innovation and inclusiveness in all tourism businesses will be encouraged and prioritised through funding provision Fast track licencing process for small businesses will be established 	MoHT will lead a rapid assessment of market barriers and work with relevant authorities to remove them
2.2 Provide continued Support to Businesses by reviewing tax changes, leasing rates and other fees	<ul style="list-style-type: none"> Investigate Continued support to tourism business through relaxation and deferral/review of taxes (inc. corporate taxes, VAT and income tax) for tourism businesses for both national and non-national enterprises (Joint Venture/FDI Enterprises) with consultation with relevant ministries Seek to provide a second round of loans for MSMEs which have not received 	MoHT to coordinate with MoFPE & NTDCC to allocate support funds

	previous support including FDIs	
2.3 Provide support to workers in the informal sector	<ul style="list-style-type: none"> • Cash for work (small scale) infrastructure projects • Financial Support for informal grassroots workers will be sought • Cash for education training programs and financial support for informal workers 	MoHT to coordinate with MoFPE & NTDCC to allocate support funds
2.4 Facilitate innovative and unconventional means of finance for MSMEs	<ul style="list-style-type: none"> • Explore and recommend microfinance options for MSMEs to help manage the current crisis and plan for the future • Investigate options to encourage safe peer-to-peer lending, crowdfunding, local credit unions, and not-for-profit Micro-Financing Institutions 	MoHT to coordinate with MoFPE & NTDCC to call for innovation by the financial sector
2.5 Explore opportunity of reorganization via Mergers and Acquisitions	<ul style="list-style-type: none"> • Investigate opportunities for synergies by encouraging businesses to consider consolidating their businesses to reduce operating costs • Ensure due diligence and transparency in order to protect all parties in the process 	Businesses are encouraged to review their operations and consider consolidation
<p>Strategy 3: Reassure and inspire the public to travel again and explore new experiences</p> <p><i>We will ensure marketing and communication activities are done to build confidence that it is safe to travel and to boost the domestic market.</i></p>		<p>MERRP Action Plan 7.8 MOHT Strategic Pillar: 3 UNWTO Pillar: 13 UNWTO Recommendation: 13,14,4 World Bank: D White Paper Priority: 1 & 2</p>
Action	Details	Lead
3.1 Improve communication to the public and provide relevant information to the potential travellers	<ul style="list-style-type: none"> • People-centred communication needs to focus on empathy, reassurance and connection in order to build confidence that it is safe to travel and to boost the domestic market • Ensure the information people need is available on the MoHT website and other mediums where they will look for it • The MoHT website will be the backbone with relevant information that people want to know and up to date 	MoHT
3.2 Establish data collection and sharing of insight for more	<ul style="list-style-type: none"> • Data needs to be collected and insights shared across ministries and private sectors to provide a clear picture of the 	MoHT to coordinate with relevant Ministries and Central Statistic

targeted marketing and communication	market and who the traveller is, and also make it possible to assess the impact of different marketing campaigns	Department
3.3 Promote domestic destinations and attractions focused on the domestic traveller's needs	<ul style="list-style-type: none"> • Campaigns to encourage "In city" activities such as F&B; nearby activities such as resorts and parks; and across the country travel for longer stays. These will be created in cooperation with the private sector • DMO staff will be trained in branding and communication as the DMOs are developed 	MoHT, MTM or future Myanmar Tourism Board
3.4 Work with social influencers and user generated content as a facilitator instead of a broadcaster	<ul style="list-style-type: none"> • Support and shape the content the influencers produce, guide them to what to say but let them do what they are good at, reaching a large audience 	MoHT to coordinate with MTM
3.5 Improve activities and promotions by DMOs	<ul style="list-style-type: none"> • Encourage and support new and existing DMOs to develop their own promotional activities and outreach in the immediate term to encourage domestic travel 	DMOs
<p>Strategy 4: Re-align tourism destinations to "the new normal"</p> <p><i>We will actively support the development of new, local destinations, targeted to recreational and domestic travellers. We commit to removing barriers for new domestic-focused products, such as campsites, nature recreation areas, and so on, and encourage the private sector to take the lead whilst ensuring environmental safeguards.</i></p>		<p>MERRP Action Plan 7.9,7.12 MoHT Strategic Program: 5 UNWTO Pillar: 3 UNWTO Recommendation: 17 World Bank Recommendation: A White Paper Priority: 5</p>
Action	Details	Lead
4.1 Enhance Visitor Experience by adapting tourism products to the domestic market	<ul style="list-style-type: none"> • Encourage all existing destinations to identify and assess immediate improvements to quality of provision in the short term 	MoHT to advocate and support the private sector in developing new and innovative products
4.2 Ensure Information and support is available for independent travellers	<ul style="list-style-type: none"> • We will work with our Regional Departments and RTCs to improve the information available about destinations through improving our existing websites and Facebook pages 	MoHT to coordinate with RTCs
4.3 Engage public support for the long-term viability of the tourist attractions via	<ul style="list-style-type: none"> • Support tourism associations to produce promotions and support local tourist attractions with destination planning 	MoHT to encourage RTCs to identify key areas to focus on for recovery. MoHT to

donations and visits in the future	<ul style="list-style-type: none"> Encourage residents to become “tourists in their own cities” once lockdown restrictions end and suggest them to revisit, and bring visiting friends and relatives in the period ahead. Promote a responsible approach to attracting visitors, encouraging safe and responsible behaviour 	work with MTM and MTF to develop online materials.
4.4 Empower networking and cooperation between DMOs	<ul style="list-style-type: none"> Create a communication platform for new and existing DMOs for knowledge sharing between one another Develop a DMO network Set up regular communication meetings via online media to discuss issues, share plans, and collaborate in marketing where appropriate 	DMOs
4.5 Encourage cooperation with CSR programs for ecotourism	<ul style="list-style-type: none"> Encourage DMOs to seek funds to develop ecotourism programmes as CSR activities in rural areas 	DMOs to coordinate with private sector
<p>Strategy 5: Develop Human Resource Capacity and strengthen skills and knowledge for the “new normal”</p> <p><i>We will ensure COVID-19 ready training for hospitality and tourism employees and MoHT regional offices is available in major destinations.</i></p>		<p>MoHT Strategic Program: 1 UNWTO Pillar: 3 UNWTO Recommendation: 5, 21 World Bank Recommendation: C White Paper Priority: 7</p>
Action	Details	Lead
5.1 Ensure COVID-19 Safe Services training for hospitality and tourism employees	<ul style="list-style-type: none"> Provide COVID-19 business reopening training for front line staff from hotels, restaurants, transport and other tourism organisations in health, safety and business readiness. Provide refresher training for existing tourism professionals in technical skills to prepare them for restart of tourism Continue MOHT COVID-19 resilience hospitality capacity upgrading for tourism sector personnel 	MoHT to coordinate with MoHS and seek support from Development Partners
5.2 Design and deliver training and development for MoHT staff and managers in the	<ul style="list-style-type: none"> Conduct a training needs analysis to prioritise essential training skills for MoHT personnel in the State and Regions to support tourism in Myanmar 	MoHT to seek support from private sector/MoHS/ Development Partners for training needs

States & Regions	<ul style="list-style-type: none"> • Develop trainings for COVID-19 inspections to ensure uniformity and spot-checks and other key areas identified under “immediate” 	analysis
5.3 Develop and deliver online learning opportunities for hospitality and tourism professionals	<ul style="list-style-type: none"> • Develop or licence online or blended learning for hospitality professionals out of work or on furlough • Facilitate training for tourism training centres in online learning pedagogies and methods to raise the quality and uptake of online learning during COVID-19 	MoHT to identify key topics for conversion to online format and to seek suitable online learning providers for Myanmar
5.4 Facilitate “new normal” preparatory training for the tourism informal sector	<ul style="list-style-type: none"> • Continue MOHT COVID-19 resilience capacity building for tourism-related grassroots personnel such as boat, trishaw, taxi and horse cart drivers 	MoHT to discuss options for training with Development Partners
5.5 Customise and deliver capacity building training for DMOs	<ul style="list-style-type: none"> • Develop functional-based training programme for DMOs as follows: <ul style="list-style-type: none"> ○ Roles and responsibilities of DMO members ○ Effective management of a destination ○ Effective marketing and promotion of a destination, including websites ○ Initial training on Destination Management Planning 	MoHT to discuss options for training with Development Partners



5.2 Medium-Term Actions

Goal: Medium Term - Rebuild Visitor Demand and Improve Product Offerings		
Strategy 6: Establish Myanmar as a trusted and safe destination <i>We will align the criteria of the UNWTO into our strategic policy to develop travel safe accreditation systems, and provide regular, updated information, instructions and alerts in accessible, easy-to-read and clear language formats.</i>		MERRP Action Plan 7.10 MoHT Strategic Program: 5 UNWTO Pillar: 3 UNWTO Recommendation: 13, 4 World Bank Recommendation: A White Paper Priority: 5
Action	Details	Lead
6.1 Establish & communicate clear policies and procedures for international travel	<ul style="list-style-type: none"> Work with relevant authorities to improve visa-free access to the country. Introduce and increase the number of countries eligible for visa waiver including visitors entering the country through the land borders Setup clear communication channels and easy access to consistent information and news to reassure and inform travellers 	MoHT to coordinate with MoLIP and NTDCC, and to provide improved communications through the MoHT Website
6.2 Introduce a COVID-19 passport for inbound travellers	<ul style="list-style-type: none"> Seek to be ready for COVID-19 safe international arrivals once borders reopen. Commission a COVID-19 passport credential to be issued after immunization has been confirmed, ensuring travellers/ individuals can provide a verifiable proof of immunization when they travel Work with appropriate Ministries to ensure processing and verification is handled professionally and quickly at points of entry to Myanmar 	MoHT to coordinate with MoHS, MoLIP and NTDCC
6.3 Develop a travel safe accreditation system	<ul style="list-style-type: none"> Work with an external agency to develop a travel safe accreditation system that rewards tourism organisations that set a standard for health and safety for travellers (such as the WTTC 'Safe Travels': Global Protocols & Stamp for the New 	MoHT to coordinate with NTDCC and WTTC

	Normal)	
6.4 Introduce MOHT Travel “Safe Service” brands	<ul style="list-style-type: none"> Research, design and launch COVID-19 Safe branding for tourism sub-sectors - hotels, transport operators, restaurants, travel/tour operators and MICE providers 	Develop brand identities to distinguish different sub-sectors
6.5 Open regional travel bridges when appropriate	<ul style="list-style-type: none"> Explore reciprocal travel agreements between countries in east Asia that would allow for non-essential travel, without requiring a self-isolated quarantining period upon arrival and return. Review travel policies on an ongoing basis to be ready to welcome regional business, family and leisure travellers under flexible local travel rules 	MoHT to coordinate with NTDC
<p>Strategy 7: Position Myanmar in the heart and minds of International travellers</p> <p><i>As regional travel restrictions are being lifted, markets open up again, and international travel intent and consumer confidence are growing, our objective is to increase demand for holidays to Myanmar.</i></p>		<p>MERRP Action Plan 7.12</p> <p>MoHT Strategic Program: 3</p> <p>UNWTO Pillar: 2</p> <p>UNWTO Recommendation: 14</p> <p>World Bank Recommendation: A</p> <p>White Paper Priority: 9</p>
Action	Details	Lead
7.1 Build Myanmar Brand Awareness in selected target markets through relevant digital channels	<ul style="list-style-type: none"> For each target market we will develop an integrated marketing plan with defined Personas as well as Channel and Content Strategies to ensure more targeted reach We need to connect with potential travellers early, get them to dream about visiting Myanmar, either for the first time or a revisit to see more Develop campaigns for the target markets to connect on an emotional and inspirational level in the relevant languages (Chinese, Thai, Japanese, Korean, English) 	MoHT and NTDC
7.2 PR Activities to promote Myanmar as a safe (from COVID-19 and conflicts) and attractive destination to visit	<ul style="list-style-type: none"> News and activities being done to create a Safe Travel Destination needs to be communicated through different media outlets, providing different voices of confidence to international tourists to visit Myanmar 	MoHT to seek and coordinate different media outlets

7.3 Virtual Tours offered through Virtual Reality before making a decision to visit Myanmar	<ul style="list-style-type: none"> • By creating Virtual Reality tours/campaigns, tourists can be attracted to Myanmar and experiences such as meditation in a monastery, exploring a temple in Bagan, visiting Inle lake in a boat, riding a balloon over Bagan or enjoying the experiencing at a tea shop in Yangon. • This can be done as an official collaboration with Google Maps or Facebook etc to leverage their existing user base 	MoHT to seek private sector collaboration
7.4 Promote Myanmar as an attractive location for branded video and movie filming	<ul style="list-style-type: none"> • Encourage movies to be made in Myanmar through incentives such as VAT refund etc on spending etc in exchange for visibility in movies • Encourage adventure brands such as Redbull to make videos in Myanmar promoting adventure travel and nature experiences 	MoHT
7.5 Plan a Visit Myanmar Year	<ul style="list-style-type: none"> • Together with the private sector, plan and organise a Visit Myanmar Year 	MoHT and NTDCC
<p>Strategy 8: Diversify the tourism product base, improve quality and strengthen protected areas by enhancing connectivity</p> <p><i>We will develop Myanmar’s image as an exciting and action-oriented destination, whilst strengthening and celebrating our diverse cultures, landscapes, and ensure our protected areas are sensitively developed for tourism.</i></p>		<p>MERRP Action Plan 7.12 MoHT Strategic Program: 5,6 UNWTO Pillar: 3 UNWTO Recommendation: 17 World Bank Recommendation: B,D White Paper Priority: 2</p>
Action	Details	Lead
8.1 Develop new tourism product categories	<ul style="list-style-type: none"> • Focus on developing new, energetic, and experience-based tourism by identifying potential areas in conjunction with the private sector • Encourage the safe and regulated development of outdoor adventure products such as bungee jumping, ziplining, canoeing, rafting, abseil, paragliding, high ropes and rock climbing, etc • Use international standards to develop SOPs for adventure activities 	MoHT to encourage RTCs and DMOs (as they are developed) to provide incentives for the development of such activities in appropriate areas by the private sector
8.2 Promote Myanmar for Sports Tourism	<ul style="list-style-type: none"> • Promote Myanmar’s existing sports facilities (in Naypyitaw especially) and provide incentives for international 	MoHT to coordinate with NTDCC, RTCs, DMOs and MoHS

	<p>sporting events to be held in the country</p> <ul style="list-style-type: none"> • Provide incentives for special sporting events country-wide, such as ultra-marathons, endurance cycling, and so on 	
8.3 Promote a destination's competitive advantage and unique story	<ul style="list-style-type: none"> • Promote regional festivals • Enhance visitors' experience at CBT sites by adding herbal medicine, ethnic art, craft and performances, organic farming and introduction of authentic cuisines, etc • Promote Myanmar's geographic diversity from an untouched archipelago in the south and the Himalayas in the north • Destinations to re-focus on promoting experiences with unique stories behind 	This will be a key role of DMOs as they are developed
8.4 Facilitate restructuring of domestic flight pricing and introduce voluntary but comprehensive entrance fee collection to encourage expatriate residents to travel internally in Myanmar, and reduce the cost of travel by international visitors once Myanmar's borders are opened	<ul style="list-style-type: none"> • Discuss dual pricing with airlines, and highlight the cost of domestic air travel as a significant barrier to international visitors • Re-evaluate entrance fees to Heritage destinations, Parks and resorts to consider better local income generation for tourism management 	MoHT to coordinate with domestic airlines
8.5 Ensure our Protected Areas are sensitively and appropriately developed for tourism	<ul style="list-style-type: none"> • Review the Myanmar Ecotourism Policy and Management Strategy for Protected Areas 2015- 2025 to focus on broader tourism management for protected areas 	MoHT to coordinate with MoNREC

<p>Strategy 9: Support MSMEs through digitisation, tourism investments, technical and HRD assistance</p> <p><i>We see digital transformation as a necessity for the survival of tourism businesses: we will support MSMEs through provision of training on</i></p>	<p>MERRP Action Plan 4.5 MoHT Strategic Program: 5 UNWTO Pillar: 1 UNWTO Recommendation: 18, 5, World Bank Recommendation: A,B</p>
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<i>digital literacy, loans and ensure the licencing procedures and taxation of new and existing tech start-ups are relaxed.</i>		White Paper Priority: 6
Action	Details	Lead
9.1 Establish fast-track approval system for new emerging tourism MSMEs	<ul style="list-style-type: none"> Approve tourism related investments with no delay, giving priorities to micro, small and medium enterprises with new ideas. 	MoHT to coordinate with related Ministries, RTCs
9.2 Implement digital systems for all tourism standard Business Procedures	<ul style="list-style-type: none"> Promote online payments of administrative procedures, improve efficiency and minimize in person contacts 	MoHT to coordinate with RTCs and relevant ministries
9.3 Strengthen Tourism-Related Supply Chains	<ul style="list-style-type: none"> Improve linkages between local producers and the tourism sector Expand access to tourism supply chains for local producers and service providers Reorient value chain process for the sustainability of tourism-related micro, small and medium enterprises (MSMEs) including hotel and tourism 	MoHT to coordinate with RTCs and DMOs
9.4 Provide technical assistance to tourism-related micro, small and medium enterprises (MSMEs)	<ul style="list-style-type: none"> Create easier access for MSMEs to gain vocational training, microfinance, and value chain development, business support services, market linkages, etc Initiate capacity building for MSMEs to maximize tourism's contribution to employment and income generation Educate MSMEs how to increase the proportion of tourism destination spending to reach the local communities Encourage MSMEs to share their efforts and expertise in tourism product development and marketing and promotional activities 	MoHT to provide training and to seek support from Development Partners and Private Sector
9.5 Set up Industry-centric finance resource institution	<ul style="list-style-type: none"> Investigate setting up a tourism focused financing institution, based on international best practice, with clear roles and purpose in sustainably developing the tourism sector 	MoHT to coordinate with NTDC and financial institutions
Strategy 10: Set national tourism standards, ensure access to learning and create new tourism jobs <i>We will develop common curriculum national qualifications based on Myanmar Tourism Occupational Competency Standards. This will lead to a consistent national tourism curriculum in public and private training and</i>		MERRP Action Plan 8.6 MoHT Strategic Program: 1 UNWTO Pillar: 1 UNWTO Recommendation: 5,11,21 World Bank Recommendation: C

<i>educational institutions endorsed by the Ministry, in alignment with National Tourism Occupational Competency Standards and the ASEAN Tourism Professionals Registration System (ATPRS).</i>		White Paper Priority: 7
Action	Details	Lead
10.1 Develop common curriculum and national qualifications based on Tourism Occupational Competency Standards	<ul style="list-style-type: none"> Develop and implement national tourism curriculum in public and private educational institutions Ensure assessment and certification is in alignment with National Tourism Occupational Competency Standards and recognised by the ASEAN Tourism Professionals Registration System (ATPRS) 	MoHT
10.2 Establish national system for delivery of Hotel and Tourism Occupational Competency Standards	<ul style="list-style-type: none"> Establish assessment centres in States and Regions to train the workforce and provide assessment and certification of qualified workers Promote national standards to the sector for use for HR and quality Promote national standards to the private training institutions and encourage them to register as assessment centres 	MoHT coordinates with NSSA
10.3 Improve Human Resource Management systems within MoHT	<ul style="list-style-type: none"> Implement a Competency-based Human Resource Management System to better plan and assess the needs and current human resource capacity 	MoHT
10.4 Ensure greater access to tourism vocational education for everyone	<ul style="list-style-type: none"> Collaborate with MoE/DTVET to ensure tourism vocational educational opportunities are available to all people in Myanmar Encourage training schools to offer scholarships for disadvantaged youth and women from ethnic nationalities 	MoHT
10.5 Create new tourism jobs for citizens	<ul style="list-style-type: none"> Develop job creation programmes in States and Regions to open up career opportunities in hospitality and tourism for local people Provide funding for job creation programmes and to support employers in offering training and employment 	MoHT to coordinate with RTCs to advocate for funds at the State/Regional level
Strategy 11: Develop destination management strategies, standards and guidelines for DMOs <i>We will commit to supporting the decentralization of tourism and support the local decision making and management of new and existing</i>		MERRP Action Plan 7.11 MoHT Strategic Program: 4 UNWTO Pillar: 3 UNWTO Recommendation: 19 World Bank Recommendation:

<p><i>destinations through the development of accountable and democratic Destination Management Organisations (DMOs), led by the Pyithu Hluttaw MP responsible for the destination. This will lead to inclusive destinations that are managed through inputs from all citizens, as well as the tourism-related private sector. It will also better equip local decision making for new destination development, infrastructure priorities and encourage local entrepreneurship.</i></p>		<p>D White Paper Priority: 4</p>
Action	Details	Lead
<p>11.1 Develop DMOs to ensure inclusive input from Township/District level</p>	<ul style="list-style-type: none"> • A clear strategy is developed for DMO composition, as to the roles and function of the DMOs, and how they are overseen by the State and Region Tourism Committees as well as the Ministry • Tourism is overseen and managed at the local level, by the local level, transparently, and inclusively • Local innovation and employment is promoted • Promotes new destinations to develop 	<p>MoHT with RTCs, seek Development Partner support and industry consultation</p>
<p>11.2 Develop DMOs as locally-based institutions with well-trained and motivated full-time staff</p>	<ul style="list-style-type: none"> • Roles and functions of local DMOs as well as governance, financial planning and implementation are discussed openly with relevant organisations, including the business sector and development partners • Tourism and promotion is actively managed at the local level • Destinations can develop without protectionism of big business • Management of tourism at the local level is managed by the local level 	<p>MoHT with RTCs, seek Development Partner support and industry consultation</p>
<p>11.3 Develop long-term financial and capacity building programme for DMOs</p>	<ul style="list-style-type: none"> • Financial of DMOs is investigated by reviewing financing options, including through the State/Region budget, entrance fees, and/or other possible funding sources • A long-term capacity-building programme is developed and carried out for local DMOs 	<p>MoHT with RTCs Development Partner support and industry consultation</p>
<p>11.4 Develop and implement destination management plans for</p>	<ul style="list-style-type: none"> • Follow Destination Management Planning models to develop functioning Destination Management 	<p>MoHT to support DMOs to develop plans, seeking</p>

each destination.	<p>Plans</p> <ul style="list-style-type: none"> • Destinations have inclusively-developed Destination Management Plans that ensure destinations are great places to live, visit, and work • DMOs to work on completing annual 1 year inclusive development plans to feed into State/Regional plans 	Development Partner support as necessary
11.5 Implement Common Standards and Guidelines to oversee DMOs	<ul style="list-style-type: none"> • Each DMO will be different, however standards will need to be in place to ensure their common function is understood, and their management is inclusive and transparent • Management of destinations is inclusive, transparent, competitive, and prosperous 	MoHT with DP support and industry consultation
11.6 Expand and upscale the skills and capability specific to the destination	<ul style="list-style-type: none"> • To strengthen the sector's ability to weather future storms and educate stakeholders about the new normal themes for sustainable development • Encourage private sector to innovate new products 	Encouraged by local DMOs and RTC



5.3 Long-term Actions

Goal: Long Term - Develop a more resilient, balanced, responsible, and sustainable tourism sector		
Strategy 12: Establish A Smart Tourism Ecosystem and digital infrastructure <i>We aim to have a Smart Tourism Ecosystem that collects and distributes relevant data that can support destination planning and includes all digital players and technologies in a sustainable way.</i>		MoHT Strategic Program: 6 UNWTO Pillar: 3 UNWTO Recommendation: 5, 18 World Bank Recommendation: B, D White Paper Priority: 2,5
Action	Details	Lead
12.1 Connect stakeholders and digital players for automatic information and data gathering	<ul style="list-style-type: none"> Though online tools and services, stakeholders and technology platforms will be connected to generate intelligence and insights for the sector 	MoHT to connect existing data gathering systems through other ministries, private sector, OTAs, etc
12.2 Support the use of digital service and provide digital literacy training to the industry	<ul style="list-style-type: none"> The future is digital so the tourism sector needs to adapt to the use of digital service and tools. Technology and Digital Connectivity will help MSME business to know the trends and visitors/consumers preferences 	MoHT to coordinate with either private sector providers or Development Partners
12.3 Build Big Data Capabilities	<ul style="list-style-type: none"> Find the skills and solutions to manage and analyse the big data collected through the industry collaborations 	MoHT to coordinate with either private sector providers or Development Partners
12.4 Set up National Tourism Web Portal	<ul style="list-style-type: none"> Develop a national tourism web portal for all tourism information and resources structured in the form of a social network to provide tourists with a customised, unique, and enriching travel experience. Using GIS/Google Maps to visualize static and dynamic objects according to their geographical location. 	MoHT, MTM (Myanmar Tourism Marketing – MTF)
12.5 Establish	<ul style="list-style-type: none"> Centre will provide statistics and research 	MoHT

National Tourism Research & Data Centre	<p>on both international and domestic tourism within Myanmar including tourism forecasting, surveys and research reports.</p> <ul style="list-style-type: none"> • Provide research and analysis on the economic value of tourism to the economy. Data will assist the government, tourism industry and other Myanmar businesses to make informed planning, marketing and investment decisions 	
<p>Strategy 13: Establish a "Myanmar Tourism Board" for coordination of Marketing & Communication activities</p> <p><i>We recognise that an independent Tourism Board is an important part of a collaborative tourism sector where marketing funds and activities can be managed centrally and coordinated with DMOs</i></p>		<p>MoHT Strategic Program: 3 UNWTO Pillar: 2 UNWTO Recommendation: 14, 19 World Bank Recommendation: A White Paper Priority: 5</p>
Action	Details	Lead
13.1 Agree on the formation of an independent body to coordinate marketing and promotions	<ul style="list-style-type: none"> • Set up a structure so that marketing activities and funds for marketing and tourism promotions are centrally managed and coordinated with the whole sector under the auspices of an independent Myanmar Tourism Board 	MoHT to initiate with the NTDCC, MTM, MTF, and other relevant agencies
13.2 Align with DMOs for content ideas	<ul style="list-style-type: none"> • Ideas and content should in the best case be sourced from each DMO once established, creating access to a wider range of relevant quality content 	MoHT to coordinate with DMOs in potential partnership with Development Partners
13.3 Work with legislative channel for Myanmar Tourism Development Act	<ul style="list-style-type: none"> • Encourage a rights-based approach to implementation of tourism reforms important to the management of impacts of the tourism sector • Contribute to reform of the Investment Law(s), labour laws, freedom of association and social dialogue • Ensure integration of Environmental Conservation Law, EIA Guidelines, Land Use Policy, Transport Master Plan and Directives for Coastal Beach Areas 	MoHT, MoPFI,
13.4 Set up Myanmar Tourism Development Board	<ul style="list-style-type: none"> • Establish the MTDB to act for the government on planning, development, regulation, and policy implementation of 	MoHT, MTF

	<p>tourism in Myanmar</p> <ul style="list-style-type: none"> • Develop terms of Reference and seek Cabinet approval for its role • Encourage policy development in conjunction with the tourism industry, as well as an emphasis on regional and local level decision-making. • Developing a multi-actor system that includes public-private partnerships and greater horizontal and vertical co-ordination of relevant government bodies • Clarify funding and management of events and marketing activities locally and internationally 	
13.5 Work with legislative channel for update of Myanmar Cesses Collection Act	<ul style="list-style-type: none"> • Propose reforms and updates to the District Cesses Act (1880) which affects taxes on land and buildings • Recommend how states/regions or the central government raise funds for specific purposes such as a levy for local tourism development levied on both indirect and direct taxes • Recommend how Cess can be implemented by states/regions for purposes such as COVID-19 relief as a temporary and not permanent source of revenue, and discontinued when the purpose levying it is fulfilled. 	MoHT, GAD, MoFPI
<p>Strategy 14: Strengthen tourism human capital by establishing pathways to higher education and by updating the national HRD Strategy</p> <p><i>We will strive to develop Myanmar’s talent in order to develop a vibrant, sustainable, culturally sensitive, inclusive, and well managed tourism sector.</i></p>		<p>MERRP Action Plan 8.1 MoHT Strategic Program: 1 UNWTO Pillar: 3 UNWTO Recommendation: 5, 21 World Bank Recommendation: C White Paper Priority: 7</p>
Action	Details	Lead
14.1 Update National Tourism Human Resource Development Strategy	<ul style="list-style-type: none"> • Review and update the National Tourism Human Resource Development Strategy (2017) to guide and plan for future tourism growth • Ensure a skilled and qualified workforce by ensuring quality of tourism education and training 	MoHT to coordinate with Development Partners

<p>14.2 Develop Master's and higher academic programmes in Tourism & Hospitality Management</p>	<ul style="list-style-type: none"> • Identify suitable universities in North and South of the country to develop curriculum and gain accreditation from the government leading to the development of a Master's and higher academic programmes in Tourism & Hospitality Management • Seek support or partnerships from international Universities to develop internationally recognised/accredited tourism and hospitality programmes 	<p>MoHT to seek potential Universities in cooperation with RTCs</p>
<p>14.3. Work with National Accreditation & Quality Assurance Council for credit transfer between Tourism TVET and Academic pathways</p>	<ul style="list-style-type: none"> • Support the implementation of the Myanmar National Qualification Framework • Ensure implementation of the Tourism & Hospitality National Qualification Framework to making TVET qualifications clearer to other stakeholders • Establish a credible and transparent methodology for allocating qualifications to levels in the NQF, and allowing TVET qualifications to be compared, in terms of level, with general educational qualifications. • Support credit recognition agreements linked to learning outcomes at bilateral, regional and national level • Emphasize learning outcomes as a means of comparing different education and training programmes. • Implement recognition of prior learning system for NSSA and TVET qualifications 	<p>MoHT, MoE/DTVET, NSSA</p>
<p>14.4 Work with legislative channel to introduce a Myanmar Tourism Professional Council (MTPC) Act</p>	<ul style="list-style-type: none"> • Prepare the articles and bylaws essential to the formation of the MTPC • Develop regulations to control the areas of activity including rules necessary to regulate membership criteria, the composition of the governing body and its sub-organizations • Develop requirements relating to tax issues consistent with Myanmar tax laws • Establish requirements for MTPC to receive grants from government and to generate revenue from conferences, events, the sale of publications and in 	<p>MoHT, NSSA</p>

	other ways	
14.5 Set up Myanmar Tourism Professional Council	<ul style="list-style-type: none"> Form MTPC with members from industry, education and other bodies Establish experts to advise on professional tourism qualifications Ensure the ATPRS is fully functioning in Myanmar for recognition of Myanmar tourism qualifications and employment mobility 	MoHT, NSSA

<p>Strategy 15: Improve tourism connectivity and accessibility</p> <p><i>We commit to take both a long-term perspective on advocating for resources to develop high quality tourism and transport infrastructure that can be accessed by all citizens, and a short-term view on reducing the cost of travel to be more in line with our neighbouring countries, whilst safeguarding our domestic airlines and transport operators. In the long-term we will seek to re-develop and upgrade our rail network for both tourism and the benefit of low-carbon trade and travel for all. We will prioritise infrastructure spending where it has most impact.</i></p>	<p>MoHT Strategic Program: 2 UNWTO Pillar: 3 UNWTO Recommendation: 9, 17 World Bank Recommendation: B</p>
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Action	Details	Lead
15.1 Improve connectivity between international and domestic airports	<ul style="list-style-type: none"> Work with Department of Civil Aviation and domestic airlines to improve linkages with international airlines Smooth international to domestic air connections at Yangon, Mandalay, and Naypyitaw International Airports, to enhance customer experience and improve access to destinations 	MoHT to coordinate with Airlines and Department of Civil Aviation
15.2 Improve connectivity with regional capitals direct to destinations: upgrades of selected domestic airports to international status	<ul style="list-style-type: none"> Airports will be prioritised for upgrade by their wider contribution to trade and economic development Direct links between significant regional markets (i.e. Bangkok, KL, Singapore, etc) and destinations such as Heho, Bagan, and Thandwe will allow destinations to grow 	MoHT to coordinate with States/Regions, Department of Civil Aviation and NTDC to identify airports and long-term budgets
15.3 Improve connectivity with regional capitals direct to destinations:	<ul style="list-style-type: none"> Existing airports will be categories by the type and size of aircraft they can handle, and appropriate airline partners selected for agreements based upon international 	MoHT to coordinate with States/Regions, Department of Civil Aviation and NTDC

<p>agreements with international and domestic airlines to open new international routes direct to destinations</p>	<p>aviation laws and agreements. Steps will need to be taken to safeguard Myanmar's domestic carriers</p> <ul style="list-style-type: none"> • Direct links between key airports in destinations (for example Heho, Thandwe, etc) and regional capitals will boost destination development, especially to rural and beach destinations • Reciprocal arrangements will need to be made between domestic and third-country airlines to open up new international air routes 	<p>to work on international air agreements</p>
<p>15.4 Improve safety and equipment of domestic and international airports</p>	<ul style="list-style-type: none"> • Focus on improvements of safety and security of air travel • Improved consumer confidence in safety and security equipment, and ability to handle increased air traffic by expanding effective air routes 	<p>MoHT to coordinate with Department of Civil Aviation</p>
<p>15.5 Improve water transport and jetties in destinations</p>	<ul style="list-style-type: none"> • Work with State and Region Tourism Development Committees and/or DMOs as they are developed to identify key jetties and other tourism-related water transport infrastructure for upgrading and re-development • Improved waterway connection and better facilities for river cruises and boat trips 	<p>RTCs and Inland water transport and Port Authority</p>
<p>15.6 Improve road access to major destinations and new destinations</p>	<ul style="list-style-type: none"> • The Southern Economic Corridor project is underway with the support of ADB • Ensure the transformation of the Southern Economic Corridor, multi- country tour circuit and sustainable tourism development in coastal marine areas • Develop the northern circular route, linking Shan - Kayah - Chiang Mai - Chiang Rai, with northern Thailand and beyond 	<p>MoHT to coordinate with RTCs and relevant infrastructure development agencies</p>
<p>15.7 Rejuvenate key railway lines and develop historical railway heritage programmes</p>	<ul style="list-style-type: none"> • Seek to improve railway infrastructure • Develop and publish rail itineraries for Domestic Tourism, regional and international 	<p>MoHT and Ministry of Rail Transportation to seek long-term support to re-develop rail network</p>

<p>Strategy 16: Ensure destination management is inclusive and in consultation with local stakeholders</p> <p><i>We will work to ensure our communities benefit from better tourism management of destinations.</i></p>		<p>MERRP Action Plan 11.1 MoHT Strategic Program: 6 UNWTO Pillar: 3 UNWTO Recommendation: 19 World Bank Recommendation: B, D</p>
Action	Details	Lead
16.1 Improve tourism-related small-scale infrastructure such as road side map, signages, information counters and public toilets	<ul style="list-style-type: none"> • Enable the accessibility to Rural and Community-led destinations and promote new potential destinations • Engage with local businesses and make linkages more proactive to move forward the sustainable development and strengthening of ecotourism development 	RTCs and DMOs coordinate with GAD and relevant Township Authorities
16.2 Strengthen digital Government Transformation and use of Digital Infrastructure	<ul style="list-style-type: none"> • Encourage and support the use of online services • Build capacity among government staff and understanding of digital infrastructure 	MoHT
16.3 Develop All Inclusive Tourism Infrastructure Framework	<ul style="list-style-type: none"> • Ensure the tourism sector supports the overall government's goal to deliver a major upgrade to Myanmar's infrastructure 	MoHT Coordinates with RTCs and DMOs
16.4 Move Towards Tourism Satellite Accounting System	<ul style="list-style-type: none"> • The tourism satellite accounting system will help the country further understand the sector's contribution to the Economy in terms of Investments, Employment and the value it adds to the GDP. 	MoHT, Central Statistics Organization, MOLIP
16.5 Improve waste management in destinations	<ul style="list-style-type: none"> • Work to improve comprehensive and long-term solutions to environmental and Waste Management infrastructure in the destinations. 	DMOs and RTCs

<p>Strategy 17: Invest in developing and expanding the scope of Inclusive and Community-Based Tourism</p> <p><i>We will strive to encourage destinations to grow and flourish by encouraging a much wider participation in the tourism sector, promoting</i></p>		<p>MoHT Strategic Program: 6 UNWTO Pillar: 3 UNWTO Recommendation: 13,18 World Bank</p>
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<i>growth in rural, agricultural, and cultural tourism whilst ensuring environmental, community, and cultural safeguards.</i>		Recommendation: C White Paper Priority: 4
Action	Details	Lead
17.1 Invest in, and encourage the growth of community-inclusive tourism in rural, agricultural, and protected areas	<ul style="list-style-type: none"> • Reduce government regulations for Bed and Breakfast, Homestay etc • Ensure sustainability for new and existing remote Community Based Tourism sites • Encourage handicrafts and organic food production and educate local farmers to develop agrotourism in community-based tourism sites • Ensure there is both market demand and genuine interest by communities to be involved with tourism, with safeguards in place to prevent community exploitation, land issues, and environmental protection 	<p>MoHT to lead with seeking to remove barriers to market entry in rural communities</p> <p>RTCs to lead on seeking new area for potential tourism, along with DMOs and liaise where appropriate with DRD, MoNREC and MoALI</p> <p>MoHT/RTCs to seek support from Development Partners</p>
17.2 Work with Regional Governments for funding & synchronizing emerging community-based tourism destinations to develop into sustainable eco-system	<ul style="list-style-type: none"> • Ensure regional governments provide funding support to Community Based Tourism Initiatives • Ensure Communities are at the heart of decision-making and ownership of Community Based Tourism Initiatives to ensure sustainability 	MoHT to coordinate with RTCs
17.3 Work with Ministry of Agriculture, Livestock and Irrigation for developing agricultural areas with tourism potential into agritourism hubs.	<ul style="list-style-type: none"> • Focus on supporting and improving agricultural products and branding as tourism assets along with MoALI • Explore opportunities to develop new agritourism products and areas 	MoHT to coordinate with MoALI
17.4 Work with legislative channel for Community Based Tourism Act to encourage tourism	<ul style="list-style-type: none"> • Develop clear and transparent Community Based Tourism licencing procedures • Actively encourage tourism SME start-ups in rural areas to support the growth of 	MoHT to review licencing procedures and work to remove barriers to market access whilst

SMEs in rural areas	<p>tourism in rural areas</p> <ul style="list-style-type: none"> • Ensure safeguards are in place for all rural enterprises to maintain and enhance the environmental and social landscape 	ensuring Environmental and Social protection is in place
17.5 Set up National Community-Based Tourism Centre	<ul style="list-style-type: none"> • Work with international best practice providers to develop a National Community Based Tourism Centre, with the purpose of sharing knowledge, training, and promotion of CBT country-wide 	MoHT to lead

<p>Strategy 18: Safeguard tourism resources and prevent negative impacts on social and natural environment</p> <p><i>We will establish a means to ensure sustainability of tourism products, resources and tourism destinations in Myanmar. We will protect vulnerable communities and indigenous people's areas from negative impacts of tourism, whilst seeking to improve linkages between local producers and the tourism sector.</i></p>		<p>MoHT Strategic Program: 6 UNWTO Pillar: 3 UNWTO Recommendation: 12,16 World Bank Recommendation: D White Paper Priority: 4</p>
Action	Details	Lead
18.1 Prevent negative impacts on social and natural environment	<ul style="list-style-type: none"> • Improve environmental conservation including waste management and using recycle products in destinations • Promote awareness and knowledge of climate change integrated in environment, tourism, land use and forest policy and laws, etc 	RTCs and DMOs, overseen by MoHT and the NTDC
18.2 Safeguard Myanmar's Cultural and Natural Heritage	<ul style="list-style-type: none"> • Environmental and Social Impact Assessments to be conducted on all new tourism developments and land-use re-assignments: a regulation system will be investigated to ensure these are transparent and professional • Encourage the re-use of heritage buildings for tourism purposes 	RTCs and DMOs, overseen by MoHT and the NTDC
18.3 Promote a wider understanding of Myanmar's cultural and natural heritage	<ul style="list-style-type: none"> • Promote cultural heritage and natural resources • Work with education providers to develop field visits to tourism and heritage sites, and work to ensure local heritage and history is included in the education curriculum • Provide support (scholarship, training, subsidies, product development, branding, healthcare, homestay, etc) to local communities 	RTCs and DMOs to work with local schools at the Township level, MoHT to coordinate with MoE and MoRCA

<p>18.4 Improve the overseeing of tourism's governance</p>	<ul style="list-style-type: none"> • Ensure that tourism related activities remain transparent with regard to land use and ownership, with RTCs publicly sharing licence applications, decisions, and so on. • Monitor the overall sector to ensure that is in compliance with current rules, regulations, laws, and customary laws 	<p>Overseen by MoHT and NTDCC</p>
<p>18.5 Set up Tourism Trust for conservation of social and natural environment to enhance tourism resources</p>	<ul style="list-style-type: none"> • Investigate a new tourism levy that would provide funds to support tourism-related conservation country-wide • Set up an independent board to manage how the levy is spent, based on priorities, merit, and positive impact to the environment 	<p>MoHT to Lead</p>





6 IMPLEMENTATION PHASE

The Ministry will adopt an adaptive system to implement this recovery roadmap. The Covid-19 situation dictates that we must be adaptive and reactive: we recognise that priorities will inevitably change, and we will need to review our progress on our immediate priorities weekly.

We have adapted the Action Table in Chapter 5 of this document to an online management system, the *Tourism Recovery Roadmap Live Action and Monitoring Tool* for internal use by our Ministry, where we allocate resources and staffing responsibilities within the Ministry, followed by a system where we review progress, make an evaluation on our actions and their appropriateness, and adjust or amend as needed on a weekly basis. A broader re-evaluation will take place in March 2021 to review overall progress.

Lux-Development will commit to supporting us in adopting the new *Tourism Recovery*



Roadmap Live Action and Monitoring Tool to begin implementation of the MTSRR from 1st October 2020.

ANNEXES

Annex I: Plans used in the development of the MTSRR

Myanmar Economic Recovery & Reform Plan (October 2020)

- Goal 1: Strengthen the Macroeconomic Environment
- Goal 2: Strengthen Private Sector Participation & Promote Private Sector-Led Growth
- Goal 3: Promote Inclusive Rural Growth Through Agricultural Development
- Goal 4: Promote Financial Sector Stability
- Goal 5: Facilitate Reverse Migration
- Goal 6: Mitigate Economic Shocks & Aftershocks Impacting Most Vulnerable Groups

Myanmar Tourism Master Plan Outline (2021 - 2025)

1. Human Resource Development
2. Improve Connectivity and Tourism Related Infrastructure
3. Marketing and Promotion
4. Implement standards and guidelines for tourist destinations and tourism services
5. Enhance visitor experiences by developing new tourism products
6. Public Private Partnerships (PPPs) for sustainable, inclusive and responsible tourism

World Tourism Organization (UNWTO) Covid-19 Tourism Recovery Technical Assistance Package

1. Economic recovery
2. Marketing and promotion
3. Institutional strengthening and building resilience

World Tourism Organization (UNWTO) A Call for Action Mitigate the Socio-Economic Impact of COVID-19 and Accelerate Recovery

1. Managing the crisis and mitigating the impact
2. Providing stimulus and accelerating recovery
3. Preparing for tomorrow

World Bank Group: Myanmar tourism recovery and Development in the aftermath of COVID-19

- A. Rebuilding Visitor Demand
- B. Increasing Visitor Access and spending
- C. Boosting Sector Inclusiveness
- D. Enhancing destination sustainability & Safety

Myanmar Tourism Marketing et al: Tourism and COVID-19 in Myanmar. Priorities for Restarting Tourism, White Paper. (August 2020)

1. Put Safety First
2. Promote Domestic Tourism
3. Adopt a Phased Approach for Reopening to International Travel
4. Improve Destination Management and Market Segmentation

5. Revise the Current Approach to Marketing and Promotion
6. Build a Supportive Business Environment
7. Invest in Human Resources— Managing Talent During and After COVID-19

Annex II: Consultations

Due to COVID-19 all consultative meetings with stakeholders, government officials and the private sector were conducted online with conference technology:

- ◆ MoHT - Senior Management Meeting
- ◆ MoHT - Departmental meetings with head of departments and technical staff
- ◆ Private sector meetings with key associations
- ◆ MTF
 - MHA
 - MTGA
 - MTM
 - Private Sector one-to-one meetings and online conference discussions
- ◆ Government Ministries that impact tourism
- ◆ MoHS
 - MoFA
 - MoE/DTVET
 - MoNREC
 - MoPFI
 - MoRAC
 - MoLESS
 - MoHA
 - MoT
 - In addition, four tourism surveys were conducted during May-September 2020 to inform the MTSRR:
- ◆ Industry survey - for tourism impacts with MSMEs (MOHT/LuxDev May 2020)
- ◆ Industry survey - for tourism impacts with MSMEs (MOHT/LuxDev September 2020)
- ◆ Industry survey - HR and training needs (MOHT/LuxDev May 2020)
- ◆ Hotel Occupancy Survey – January – August 2020 (MOHT/LuxDev September 2020)
- ◆ Domestic travel survey - individual national and expatriate travellers in Myanmar (Myanmore Media Group, September 2020)

We have also made use of the team’s considerable involvement in Myanmar’s tourism sector and extensive discussions, forums, webinars, and events conducted online during the April-May 2020 lockdown period in Myanmar, and have been guided by recent Myanmar tourism-focused publications.

Annex III – The Myanmar Economic Recovery & Reform Plan

MTSRR aligns with the MERRP Goals, Strategies and Actions Plans as follows:

GOAL 2: Strengthen Private Sector Participation & Promote Private Sector-led Growth

MERRP STRATEGIC ACTIONS	OUTPUTS	MTSRR REF
Strategy 4: Enhance Domestic Productive Capacity in Myanmar		Strategy 2: Continue economic support to MSMEs and individuals in the tourism sector Strategy 9: Support MSMEs through digitisation, tourism investments, technical and HRD assistance
4.5 Establish an Economic Recovery Fund to support MSMEs and larger-scale enterprises in specific growth-driving sectors, with a focus on those with multiple links to domestic, regional and global supply chains, and with special attention paid to women-led MSMEs and youth entrepreneurs	A suitable budget for the Economic Recovery Fund proposed to Parliament	2.1 Begin an immediate review of the barriers to market access for small entrepreneurs 2.2 Provide continued Support to Businesses by reviewing tax changes, leasing rates and other fees 2.3 Provide support to workers in the informal sector 2.4 Facilitate innovative and unconventional means of finance for MSMEs 2.5 Explore opportunity of reorganization via Mergers and Acquisitions 9.1 Establish fast-track approval system for new emerging tourism MSMEs 9.2 Implement digital systems for all tourism standard Business Procedures 9.3 Strengthen Tourism-Related Supply Chains 9.4 Provide technical assistance to tourism-related micro, small and medium enterprises (MSMEs) 9.5 Set up Industry-centric finance resource institution
Strategy 7: Diversification and Internationalization of Markets for Myanmar		Strategy 3: Reassure and inspire the public to travel again and explore new experiences
7.8 Promote domestic tourism by creating attractive packages under a national domestic tourism campaign	At least two attractive domestic packages created by end of FY2020/2021	3.1 Improve communication to the public and provide relevant information to the potential travellers 3.2 Establish data collection and sharing of insight for more targeted marketing and communication 3.3 Promote domestic destinations and attractions focused on the domestic traveller's needs
7.9 Make necessary preparations to allow	Revise business and tourist visa processes to	Strategy 4: Re-align tourism destinations to "the new normal"

MERRP STRATEGIC ACTIONS	OUTPUTS	MTSRR REF
high-value and low-risk business travellers and tourists from selected countries	better suit the post-COVID-19 environment by Q2 FY2020/2021	4.1 Enhance Visitor Experience by adapting tourism products to the domestic market
7.10 Expand the visa-waiver program and reduce visa extension fees to attract foreign tourists	Visa-waiver program expanded to at least one country and visa extension fees reduced by end of FY2020/2021	6.1 Establish & communicate clear policies and procedures for international travel <ul style="list-style-type: none"> • Work with relevant authorities to improve visa-free access to the country. • Introduce and increase the number of countries eligible for visa waiver including visitors entering the country through the land borders • Setup clear communication channels and easy access to consistent information and news to reassure and inform travellers 6.2 Introduce a COVID-19 passport for inbound travellers 6.3 Develop a travel safe accreditation system 6.4 Introduce MOHT Travel "Safe Service" brands 6.5 Open regional travel bridges when appropriate
7.11 Establish tourist DMOs and Tourism Advisory Councils to promote more effective partnerships between the public, private and civil society and to further the digitalization of destination marketing and management	DMOs and Tourism Advisory Councils established by Q2 FY2020/2021, in collaboration with industry representative bodies	Strategy 11: Develop destination management strategies, standards and guidelines for DMOs, Strategy 13: Establish a "Myanmar Tourism Board" for coordination of Marketing & Communication activities Strategy 16: Ensure destination management is inclusive and in consultation with local stakeholders 3.5 Improve activities and promotions by DMOs 4.4 Empower networking and cooperation between DMOs 5.5 Customise and deliver capacity building training for DMOs 11.1 Develop DMOs to ensure inclusive input from Township/District level 11.2 Develop DMOs as locally-based institutions with well-trained and motivated full-time staff 11.3 Develop long-term financial and capacity building programme for DMOs 11.4 Develop and implement destination management plans for each destination. 11.5 Implement Common Standards and Guidelines to oversee DMOs 11.6 Expand and upscale the skills and capability specific to the destination
7.12 Promote and expand niche tourism (beyond current popular destinations) within	Promotional campaigns on social media and other platforms launched by Q2 FY2020/2021	Strategy 7: Position Myanmar in the heart and minds of International travellers Strategy 8: Diversify the tourism product base, improve quality and strengthen

MERRP STRATEGIC ACTIONS	OUTPUTS	MTSRR REF
regional and global markets with an emphasis on ecotourism, outdoor and adventure-related activities and experiences		<p>protected areas by enhancing connectivity</p> <p>4.2 Ensure Information and support is available for independent travellers</p> <p>4.3 Engage public support for the long-term viability of the tourist attractions via donations and visits in the future</p> <p>4.5 Encourage cooperation with CSR programs for ecotourism</p> <p>7.1 Build Myanmar Brand Awareness in selected target markets through relevant digital channels</p> <p>7.2 PR Activities to promote Myanmar as a safe (from COVID-19 and conflicts) and attractive destination to visit</p> <p>8.1 Develop new tourism product categories</p> <p>8.2 Promote Myanmar for Sports Tourism</p> <p>8.3 Promote a destination's competitive advantage and unique story</p> <p>8.4 Facilitate restructuring of domestic flight pricing and introduce voluntary but comprehensive entrance fee collection to encourage expatriate residents to travel internally in Myanmar, and reduce the cost of travel by international visitors once Myanmar's borders are opened</p> <p>8.5 Ensure our Protected Areas are sensitively and appropriately developed for tourism</p>
Strategy 8: Nurture Human Capital for Recovery		<p>Strategy 2: Continue economic support to MSMEs and individuals in the tourism sector</p> <p>Strategy 5: Develop Human Resource Capacity and strengthen skills and knowledge for the “new normal”</p> <p>Strategy 10: Set national tourism standards, ensure access to learning and create new tourism jobs</p> <p>Strategy 14: Strengthen tourism human capital by establishing pathways to higher education and by updating the national HRD Strategy</p>
8.1 Conduct a rapid labour market assessment with a focus on strategic and urgent needs, including differential assessment/analysis of needs of women, youth and other vulnerable groups	A rapid labour market assessment commenced by Q2 FY2020/2021	14.1 Update National Tourism Human Resource Development Strategy
8.2 Invite reputable vocational training centres via the Project Bank and transparent tendering process, and	Establishment and operation of vocational training centres included within the Project Bank by Q2 FY2020/2021	

MERRP STRATEGIC ACTIONS	OUTPUTS	MTSRR REF
provide them with tax incentives and necessary land/premises via the Land Bank		
8.3 Provide Tax Credits to companies that sponsor their staff/workers to attend vocational training centres, providing equality of opportunity based on gender, age and other criteria	Order issued to provide Tax Credits to companies that sponsor their staff/workers to attend vocational training centres by end of FY2020/2021	2.3 Provide support to workers in the informal sector
8.5 Promote online job matching systems through mobile applications	At least one mobile-based job matching application developed by end of FY2020/2021	
8.6 Develop training courses and training centres for certified skilled workers via the NSSA, focused on building strategic skills needed for recovery while providing equality of opportunity based on gender, age and other criteria	Training courses in strategic skills in place by end of FY2020/2021	10.1 Develop common curriculum and national qualifications based on Tourism Occupational Competency Standards 10.2 Establish national system for delivery of Hotel and Tourism Occupational Competency Standards 10.4 Ensure greater access to tourism vocational education for everyone 10.5 Create new tourism jobs for citizens
Strategy 11: Promote Key Infrastructure Development		Strategy 15: Improve tourism connectivity and accessibility
11.1 Prioritise strategic infrastructure projects based on key criteria including, but not limited to, enhanced connectivity, beneficiary coverage and impact, reasonable levels of FIRR and higher levels of EIRR	Ministries submit strategic infrastructure projects to the Project Bank based on key criteria before Q2 FY2020/2021	16.3 Develop All Inclusive Tourism Infrastructure Framework

Annex IV – Abbreviations

ADB	Asian Development Bank	MoNREC	Ministry of Natural Resources and Environmental Conservation
ATPRS	ASEAN Tourism Professional Registration System	MoPFI	Ministry of Planning, Finance and Industry
CBT	Community Based Tourism	MoT	Ministry of Transport
COVID - 19	Novel Coronavirus (2019-nCoV)	MP	Member of Parliament
DMO	Destination Management Organization	MoRAC	Ministry of Religious Affairs and Culture
DP	Development Partners	MSMEs	Micro, Small and Medium Enterprises
DRD	Department of Rural Development	MTF	Myanmar Tourism Federation
DTVET	Department of Technical & Vocational Education & Training	MTM	Myanmar Tourism Marketing
EIA	Environmental Impact Assessment	MTSRR	Myanmar Tourism Strategic Recovery Roadmap
F&B	Food and Beverage	MTMP	Myanmar Tourism Master Plan
GAD	General Administration Department	NSSA	National Skills Standards Authority
HIA	Heritage Impact Assessment	NTDCC	National Tourism Development Central (NTDC) Committee
HR	Human Resource	OTA	Online Travel Agents
HRM	Human Resource Management	PCR	Polymerase chain reaction
IT	Information Technology	PR	Public Relations
MERRP	Myanmar Economic Recovery & Reform Plan		
MIC	Myanmar Investment Commission	RPL	Recognition of Prior Learning
MoALI	Ministry of Agriculture, Livestock and Irrigation	R/STCs	Region or State Tourism Committees
MoBA	Ministry of Border Affairs	TVET	Technical and Vocational Education and Training
MoE	Ministry of Education	UNWTO	United Nations World Tourism Organization
MoHA	Ministry of Home Affairs		
MoHS	Ministry of Health and Sports	VAT	Value Added Tax
MoHT	Ministry of Hotels and Tourism	WTTC	World Travel and Tourism Council
MoIFER	Ministry of Investment and Foreign Economic Relations		
MoLESS	Ministry of Labour, Employment and Social Security		

Annex V: References

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