

CVT Myanmar
Center for Vocational Training

SDC Project no. 7F-08670.01.01
SDC Contract no. 81017372

2018 Tracer Study
for the CVT Capacity Building Project

Insightful assessment on:

- CVT Graduated Apprentices
- Partner Companies
- Young Entrepreneurs for Myanmar
- In-Company Trainer
- CVT Certified Instructor

Prepared for



Prepared by



31st August 2018

CVT Myanmar – Center for Vocational Training

MRCS Building, No. 42, Strand Road

11181 Yangon

Union of Myanmar

www.cvt-myanmar.com

info@cvt-myanmar.com

+95 (0) 1 383676

Stefan Vogler (Switzerland)

Director Development / Vice President

stefan.vogler@cvt-myanmar.org

Jeremias Pellaton (Myanmar)

Chief Development Officer

jeremias.pellaton@cvt-myanmar.org

For further information, please do not hesitate to contact us.

Acknowledgements

Myanmar Marketing Research and Development Co., Ltd. (MMRD) deeply thank to all who supported us in bringing this report to fruition. We are grateful for the participation of individuals and officials from companies in face-to-face and telephone interviews in the 2018 Tracer Study for the CVT Capacity Building Project. MMRD would also like to thank CVT partner companies, CVT Graduate Apprentices, participants of the Young Entrepreneurs for Myanmar programme, In-Company Trainers and Certified Instructors for their time, support and perspectives during the field work conducted in May-June 2018. We further acknowledge the committed and continuous support of CVT staff. This report would not have been completed without the invaluable active and voluntary support from all the parties involved.

List of Abbreviations

ASEAN	Association of South East Asian Nations
CA	Commercial Assistant
CI	Certified Instructors (CVT)
CM	Cabinet Maker
CVT	Center for Vocational Training
EE	CVT Employees
ER	CVT Employers
E4Y	Education for Youth Program (CVT)
EL	Electrician Training
GDP	Gross Domestic Product
H & G	Hotel and Gastronomy
ICT	In-Company Trainer
KII	Key Informant Interview
MMRD	Myanmar Marketing Research and Development Co., Ltd.
MMK	Myanmar Kyat
MoST	Ministry of Science and Technology
MPT	Myanma Posts and Telecommunications
MW	Metalworker (CVT)
NGO	Non-Governmental Organization
NSSA	National Skill Standards Authority
PTC	Practical Training Centre
SDC	Swiss Agency for Development and Cooperation
SEZ	Special Economic Zone
SMVTI	Singapore Myanmar Vocational Training Institution
SPSS	Statistical Package for the Social Sciences
TTWG	TVET Technical Working Group
TVET	Technical Vocational Education and Training
USD	US Dollar
VET	Vocational Education Training
YE4M	Post-Graduate Young Entrepreneurship Programme (CVT)
YSX	Yangon Stock Exchange

Table of Contents

Acknowledgements	1
List of Abbreviations	2
Table of Contents.....	i
List of Tables.....	iii
List of Figures.....	iii
Executive Summary	a
1. Outline	5
1.1 Background	5
1.2 Methodology.....	6
2. Training Company_ Employers.....	10
2.1 Satisfaction of the Employer.....	10
2.2 Impact of the CVT Training	12
2.3 Opinion on Financial Contribution	15
2.4 Opinion on the program	17
2.5 Opinion on opening branches in Myanmar	19
3. CVT Graduate Apprentice	20
3.1 Current Employment Status	20
3.2 Satisfaction among apprentices.....	21
3.3 Impact of the CVT training	27
3.4 Opinion on the program	32
4. Young Entrepreneurs for Myanmar (YE4M)	34
4.1 Satisfaction of the Students	34
4.2 Impact of the CVT training	35
5. In-Company Trainer - Decision Maker	43
5.1 Training Feedback	43
5.2 Impact of the CVT training	44
6. In-Company Trainer- Participants	46
6.1 Training Feedback	46
6.2 Impact of the CVT training	47
7. CVT Certified Instructor	51
7.1 Training Feedback	51

7.2 Impact of the CVT training	54
8. Multiplication Ability of CVT’s Dual Education Programs.....	56
9. Findings and Recommendations	58
9.1 Training Company – Employer	58
9.2 Graduated Apprentices	60
9.3 Young Entrepreneurs for Myanmar	61
9.4 In-company Trainer – Decision Makers	61
9.5 In-company Trainer – Participants	62
9.6 Certified Instructor.....	63
Annex-1 Economic Outlook in Myanmar	65
Annex-2 Educational Outlook in Myanmar	78
Annex-3 Training Company – Employer.....	90
Annex-4 Graduated Apprentices - Employee	95
Annex-5 In-company trainer – Participants	98
Annex-6 In-company trainer – Decision Maker.....	100
Annex-7 Certified Instructor.....	101
Annex-8 YE4M	102
Annex-9 Success Stories	111
Annex-10 List of Contact for 2018 Tracer Study	116

List of Tables

Table 1: Comparison of categories and sample respondents form CVT Studies.....	a
Table 2: The sample size and categories of the respondents.....	6
Table 3 List of sample of respondents interviewed face-to-face or by phone.....	9
Table 4: Percentage of Respondents taking further actions towards starting a new business	39
Table 5: Reasons for not starting a Business.....	41
Table 6: Employment after CVT Certified Instructor Course.....	55

List of Figures

Figure 1: Training Programs	10
Figure 2: Source of information about CVT.....	11
Figure 3: Level of satisfaction on capacity	11
Figure 4: Level of satisfaction regarding efficiency and productivity	12
Figure 5: Fulfilment of Companies' Expectation from CVT's Trainings	12
Figure 6: Share of employers that say they promote CVT graduates	13
Figure 7: Share of employers on sending more employees to CVT	14
Figure 8: Registration fee have benefitted to Company.....	15
Figure 9: Share of employers regarding.....	17
Figure 10: Proposed Region and State to open CVT branches	19
Figure 11: Current Employment Status.....	20
Figure 12: expect to get paid more than non-CVT graduates	21
Figure13: Share of the respondents that say CVT helped them become more employable (2014, 2015, and 2018)	22
Figure 14: Getting Information of CVT.....	22
Figure 15: Share of respondents on relevancy of the program to the job (2018)	23
Figure 16: Level of meeting expectation	24
Figure 17: Share of respondents that rated "High" on satisfaction with capacity of trainers	26
Figure 18: Share of respondents on improvement after CVT graduation.....	27
Figure 19: Share of respondents on improvement after CVT graduation.....	28
Figure 20: Respondent's Salary/Income per month	28
Figure 21: Salary by Gender (2018).....	29

Figure 22: Share of the respondents that say they had salary throughout 3 years and got paid while on PTC at CVT	30
Figure 23: Share of respondents by type that say they had salary throughout 3 years (2018)	30
Figure 24: Share of respondents that say they got paid while on PTC at CVT	31
Figure 25: Comparison of three years on impact of CVT training on CVT graduated apprentices (2014, 2015, 2018)	31
Figure 26: Share of respondents regarding what should be kept at CVT (2015, 2018)	32
Figure 27: Share of respondents regarding what should be changed at CVT	32
Figure 28: Status and Outcome of YE4M graduates	35
Figure 29: Gaining more confidence	36
Figure 30: The most frequently applied skills at workplace.....	37
Figure 31: Skills learned from the course.....	38
Figure 32: Revenue of YE4M.....	41
Figure 33: Profit of their business.....	42
Figure 34: Reasons for sending employees to CVT	43
Figure 35: Satisfaction with Trainers after CVT (2018)	44
Figure 36: Percentage of Participants saying how they obtained information about CVT.....	46
Figure 37: Number of times respondents have shared their knowledge at work after the course .	47
Figure 38: Difficulty in understanding of the lecture.....	47
Figure 39: Satisfaction with the classroom and teaching equipment.....	49
Figure 40: Rating according to effectiveness of subjects or usefulness in workplace.....	50
Figure 41: Interest Level on Topic.....	52

Executive Summary

The Center for Vocational Training (CVT) was established in Yangon, Myanmar, in 2002. The organization’s main objective is to introduce and practice a Myanmar-adapted form of the dual apprenticeship model from Switzerland. Supported by the Swiss Agency for Development and Cooperation (SDC), CVT initiated the Capacity Building Project in 2013 with the overarching goal of bringing protracted employment, earning and training opportunities to disadvantaged youth in Myanmar through dual system vocational training. The implementation period of the project is from the year 2014 to 2018.

Myanmar Marketing Research and Development Co., Ltd. (MMRD) conducted the baseline study for the project from February to May 2014. In 2015, CVT repeated the assessment and extended the study with MMRD to include participants of the Young Entrepreneurs for Myanmar programme, In-Company Trainers, and Certified Instructors. In order to update the information provided through the baseline studies and to obtain tracer data from the additional trainings delivered by CVT, CVT Myanmar has again awarded MMRD to conduct 2018 Tracer Study.

The field work was conducted in May and June 2018 in Yangon region. The total number of sample respondents was 356. MMRD selected the available sample respondents from the list of contacts among the categories of respondents provided by CVT and recruited respondents by snow ball method. The sample size of respondents in each category in the 2014, 2015 and 2018 studies is compared in **Table 1**. The study uses both qualitative and quantitative data collection methods. The study tools used for field data collection are semi-structured questionnaire developed for collecting data from the six categories of the respondent. Most of the respondents (87%) were interviewed face-to-face, and the remaining 13% were interviewed by phone.

Table 1: Comparison of categories and sample respondents form CVT Studies

Sr.	Category of Sample Respondents	2014	2015	2018
1.	Training Companies	93	100	100
2.	CVT graduated Apprentices (male/female)	140 (83/57)	150 (66/84)	150 (104/46)
3.	Young Entrepreneurs (YE4M) (male/female)	-	24 (15/9)	41 (29/12)
4.	In-company Trainer – Decision Maker	-	15	16
5.	In-company Trainer – Participants	-	25	25
6.	CVT Certified Instructor (male/female)	-	35 (29/4)	24 (19/5)
	Total	239	349	356

CVT Partner Company

Compared to 2015, there is a growth in the number employers with high satisfaction – percentage points jumped from 67% in 2015 to 71% in 2018. As high as 98% of the employers think the CVT graduates from their companies have increased their capacity at work. This year result indicates the level of satisfaction on graduates' efficiency has increased compared to 2015 – (98% in 2018 vs. 93% in 2015).

The research shows that about 60% of the employees chose to attend CVT programs by themselves; 20% requested companies to list them as their employees to meet the application criteria, but are not working for them, whereas only 20% were fully sponsored and sent by their bosses.

Compared to 2015, the share of respondents who are willing to contribute a registration fee of \$100 to CVT from 2015 to 2020 has contracted – down from 73% in 2015 to 36% in 2018. Meanwhile, there are 60% of the employers who responded they had not paid any registration fee to CVT yet. Nearly half (43%) prefer installment payment – two times in a year.

64% of the respondents have desire to make a donation of which 38% suggested donating between 50,001 and 100,000 Kyats. 77% of them would like to make yearly donation while the remaining prefer monthly donation. Mandalay Region is perceived as the number one favorite region to open a branch, followed by Magwe Region, and Nay Pyi Taw. A vast majority is foreseeing opportunities in upper parts of Myanmar where there is a large youth population, increasing rate of high school dropouts, and high demand of skilled labor for value-added production in traditional businesses.

CVT Graduated Apprentice

The employability of the CVT graduates has slightly increased this year compared to 2015. The number of graduates who received a rise in pay or a promotion after CVT training has slightly increased – percentage points went up from 53% in 2015 to 56% in 2018. Compared to 2015, respondents who said CVT exceeded their expectations have increased by 6% from 53% in 2015 to 59% in 2018. As well, in 2015, 37% think CVT met their expectation whereas there are 40% in 2018.

A clear majority are positively affected by teaching system and teachers. The number of graduates that show optimism toward capacity of trainers has increased by two percentage points from 93% in 2015 to 95% in 2018. This year survey completely reflects the last survey in 2015 – 94% believe CVT program they attended is related to their job. As many as 66% of the graduates expect to be paid better than non-CVT graduates this year 2018 – upped by 5 percentage points from 61% in 2015.

In 2018, more respondents are earning between 200,001 and 300,000 Kyats with 36%, followed by between 300,001 and 400,000 Kyats with 26%. Compared to 2015, less graduates are earning above 500,001 Kyats. However, only one respondent earned below 100,000 Kyats in 2018. Among three years, 2018 has the lowest number of people who got salary throughout three years during the

program (81% in 2018, 85% in 2015 and 93% in 2014) as well as paid while they were in PTC at CVT (80% in 2018, 85% in 2015 and 92% in 2014). 49% are working at the same company they worked for while attending the CVT program. 32% are no longer with the same company they worked for during the program.

Young Entrepreneurs for Myanmar

Nearly one-third 32% of the respondents had their own business during the program. 15% of the respondents started a business after the program whereas none of the graduates extended their business in addition to the existing one after graduation. More than half (53%) of the respondents neither had their own business during the program nor have started at the time of the survey.

Overall, about one in seven (15%) rated Young Entrepreneur for Myanmar – YE4M program as “excellent” or “very good.” Half of the respondents rated it as “good.” Indeed, 95% of those surveyed reported trainers are adequately prepared for their lessons and certainly confident about themselves while 5% are undecided.

When asked if they would recommend the program to others, vast majority 98% of them “strongly agree” or “agree” while 2% disagree.

In-Company Trainer – Decision Maker

The majority of companies 75% are satisfied with trainer in terms of efficiency and productivity, with 19% very satisfied. With 81%, the majority of companies reported they sent their employees to increase their productivity at work. Regarding the extent to which the employees meet companies’ expectations, 94% feel trainers have performed better than before noticeably, with 6% complaining that the program does not make any difference.

In-Company Trainer – Participants

All of the respondents (100%) believe that teaching method at CVT is completely satisfactory – rated as “High.” Likewise, respondents expressed high level of satisfaction for curricula with 100% rated it as “High.” The survey finds that the respondents view handouts and textbooks provided as highly satisfactory with 88%, whereas some 12% rather suggest it as medium satisfactory. 56% are highly satisfied with the classroom and teaching equipment, 35% are rather medium satisfied, with 8% having low satisfaction. Suggestion for the course includes reducing the training period and updating the curricula.

Certified Instructor

More than three-quarters 79% reports that systematic teaching system allows one to communicate complex information clearly. When it comes to whether the course is efficient or not, two-thirds 67% reported all theory lessons were applied at workplace and upon course completion, they had become more confident to work as an instructor. Three-quarters 75% of instructors are satisfied with the classrooms, facilities and teaching environment. Out of 24 instructors interviewed, 21% (5 in total) of them provided trainings at other places. The rest 79% have not done any teaching at other places apart from workplace. One in six instructors experience some challenges which are concerned with difficulty to teach underqualified students, English language usage, and difficulty to travel while working at the same time.

They believe CVT should raise awareness of the program as well as the importance of vocational education among those who are in need of such programs and opportunities but rather remain clueless about them. Respondents are also pointing out that there is a lot of room for improvement regarding the program itself, especially the curriculum.

Recommendation by MMRD

Optimism remains strong, but what CVT needs to take into account are a constant rise of the competition, sustaining the market share, and reaching to new customers

The clear outcome from this year's survey is that the community of CVT graduates remains highly optimistic about the VET programs, YE4M, CI, ICT programs and their applicability. However, the report also highlights some concerns regarding willingness on financial contribution, raising awareness of the CVT School, long-term duration of the program, expanding in other regions, and the effectiveness of the curricula. It is clear that quicker actions and amendments need to be done for CVT to promote, sustain, and place itself at the top slot among the increasing vocational education providers in the country.

Accordingly, MMRD provides brief recommendations to address key issues observed as follows:

- Work closely with CVT partner companies and reconsider designing the affordable program beneficial for both parties
- Implement a formal agreement between companies that provide full sponsorship and their employees with regard to the continuation of employment after the program
- Raise public awareness of CVT through several media platforms, most importantly, social media
- Allocate time for practical class and theory class proportionally, for example, one day each for both
- Reduce the program duration
- Upgrade to the degree level if CVT is willing to continue the current duration of three years
- Establish more brief courses for additional subjects
- Open more branches in upper Myanmar, preferably, Mandalay Region
- Design a new curricula for different programs that fit business needs as close as possible
- Improve E2E (Education to Employment) journey of the graduates
- Track the graduates' employment and job satisfaction continuously

1. Outline

1.1 Background

In 2002, Max O. Wey¹, a Swiss national formerly employed by Red Cross International, launched the Center for Vocational Training² (CVT) in Yangon, Myanmar. Since then, CVT has launched a number of Graduate Apprentices courses such as Cabinet Maker (2002), Commercial Assistant and Metalworker (2003), Hotel and Gastronomy (2007), and Electrician (2005). Other courses include the Education for Youth Program (E4Y) (2008), Young Entrepreneurs for Myanmar (YE4M) (2014), In-Company Trainer (2014) and Certified Instructor (2014).

In order to expand its recognized services by enlarging and optimizing its facilities, knowledge and expertise, the CVT Capacity Building Project started in 2013 with support from SDC.

The CVT Board in Switzerland is leading the implementation phase and signing respective contracts with SDC. For information exchange, training of instructors and sharing of facilities, CVT has a strategic partnership with Swisscontact, 600Kids.org and Swiss Hotel Management Academy Lucerne (SHL).

To optimize the multiplication capability of CVT's vocational training programs and increase the employability of graduated apprentices, five professional training courses are expected to get official recognition from the National Skill Standards Authority³ (NSSA) within a few years⁴.

CVT has commissioned an objective third party to evaluate the project programs, validate the baseline studies and report accordingly. MMRD conducted the baseline study for the project in February 2014. The Tracer Study commissioned in 2015 is a follow up to the baseline study – the main objective is to update the information on the baseline study and to obtain tracer data from the new trainings which include YE4M, In-company Trainer and Certified Instructor. In order to update the information provided through the 2015 survey report, CVT Myanmar has again awarded MMRD to conduct the 2018 Tracer Study.

¹Max O Wey passed away in 2008.

²CVT signed with Ministry of Labour, Employment and social Security (MOLES) and officially registered as international NGO with certificate No.0057 in August 2013.

³Launched in 2007, the National Skill Standards Authority (NSSA) headed by deputy minister for labour and comprised of various stakeholders (government ministries and private organizations) to facilitate the free flow of skill labour within ASEAN region and to establish the National Occupational Skill Framework. (official website of National Employment & Skill Development) (<http://www.nesdmyanmar.org/>) accessed at 14 December 2015

⁴ First the Competency levels will be developed and then the courses will be recognized through them (CVT).

1.2 Methodology

Study Design

MMRD conducted a cross-sectional comparative (follow-up) study using qualitative and quantitative data collection methods.

Study Location

The study was conducted around Yangon area, where the interviewees are located.

Study Population

The study population was from among the six categories of respondents selected by CVT:

- 1) Partner Company (ER)
- 2) CVT's Graduate Apprentice (EE)
- 3) Young Entrepreneurs for Myanmar (YE4M)
- 4) Company for In-company Trainer (ICT C)
- 5) Participant of In-company Trainer Course (ICT P)
- 6) CVT Certified Instructor (CI)

Study Tools

The study tools used for field data collection are semi-structured questionnaire developed for collecting data from the six categories of respondents. Interviews were conducted face-to-face or by phone.

Sample Population

The total sample population for the study was 356 respondents. MMRD selected the sample from each category based on the availability (ability to contact) and voluntary participation of the respondents from the list of contacts provided by CVT and recruited required samples by snowball method. (**Table 2**).

In the contact list CVT provided, men percentage is much bigger than women. Additionally, it is learnt that Women trainees are mostly found in Commercial Assistant (CA) and Hotel & Gastronomy (H&G) courses, but rarely found in other courses.

Table 2: The sample size and categories of the respondents

Sr.	Category of Sample Respondents	Sample
1.	Training Companies	100
2.	CVT graduated Apprentices (male/female)	150 (104/46)
3.	Young Entrepreneurs (YE4M) (male/female)	41 (29/12)
4.	In-company Trainer – Decision Maker	16
5.	In-company Trainer – Participants	26
6.	CVT Certified Instructor (male/female)	24 (19/5)
	Total	356

Summary of the Study Procedure

Prior to field data collection, MMRD received the sample size to study and potential list of respondents from CVT which included their names, courses attended or company name, contact address and/or phone number. CVT and MMRD jointly developed the study tools – questionnaires. MMRD translated the semi-structured questionnaires into Myanmar language. MMRD then recruited the field data team of 10 staff, and conducted a 3-day training to explain the tools and how they were to be implemented; the training included pre-testing of the questionnaires. As well, a senior from CVT visited MMRD to deliver a presentation for deeper understanding of the works and programs conducted by the school.

After screening the list of respondents, the field staff contacted them to inquire about their willingness to participate in the study. Interviews were then scheduled with respondents who were successfully contacted and volunteered to participate in the study. On the appointed date, time and place, the assigned field staff obtained verbal informed consent and interviewed the respondents using the questionnaire. Field data collection was completed in 26 days (from 23 May to 17 June 2018). The data collected through the interviews was cleaned, coded and translated. Field staff and data entry staff conducted data quality checks to ensure that the data was complete and consistent. A quality control team conducted checks for phone interviews, and verified whether respondents completed their interviews as scheduled.

The data was then entered using Statistical Package for the Social Sciences (SPSS) and analysed for the final report.

Limitations of the Study

Limitation	Description and mitigation
Inaccessibility of a few respondents during data collection	From the list of contacts provided by CVT, MMRD was unable to reach graduates and companies whose contact details were either outdated or incomplete. Out of 1312 contacts CVT provided, MMRD could not contact 695 numbers. From the group, some were incorrect numbers while some just enquired about the course, and did not send any apprentices. MMRD was able to complete the survey using snowball method.
Phone interviews with a few respondents	Most of the respondents (87%) were interviewed face-to-face, and the remaining 13% were interviewed by phone of which majority were graduated apprentices, as they could not spare time during the working hours. Meanwhile, some had moved to other regions and villages. In phone interviews, although the field team used the same structural questionnaire as in face-to-face interviews, some of the respondents had to be contacted more than once to complete the interview as they were reluctant to answer in detail. To overcome these challenges, the interviewer had to explain the purpose of the questionnaire in detail to the interviewee, ensure that the questions were clearly understood, and call more than one time. MMRD had to contact a few of them at night-time when they were available.
Unmet data for some targets and indicators	Some partner companies did not have a complete knowledge regarding the training program and were rather vague about some information. Challenges were observed in asking workforce and the size of the company. Many companies had not contributed registration fee and annual fee yet as of the time of survey. Accordingly, they could not provide a complete set of answer regarding that section. In the case of graduated apprentice, challenges were observed in asking salary information and permanent employee's questions. Many graduates, especially, metal workers are daily waged workers and found it difficult to provide income information. When asked about YE4M revenue and profit, it was quite challenging as most of the entrepreneurs did not do bookkeeping and hence, provided estimates only.

Table 3 List of sample of respondents interviewed face-to-face or by phone

No.	Category of Sample Respondents	Face to face	Face to Face %	Phone contact	Phone contact %	TOTAL
1	Partner Company	99	32%	1	2%	100
2	CVT Graduate Apprentice	121	39%	29	62%	150
3	Young Entrepreneurs for Myanmar	34	11%	7	15%	41
4	Company of In-company Trainer	15	5%	1	2%	16
5	Participant of In-Company Trainer Course	22	7%	3	6%	25
6	Certified Instructor	18	6%	6	13%	24
	TOTAL	309	87%	47	13%	356

2. Training Company_ Employers

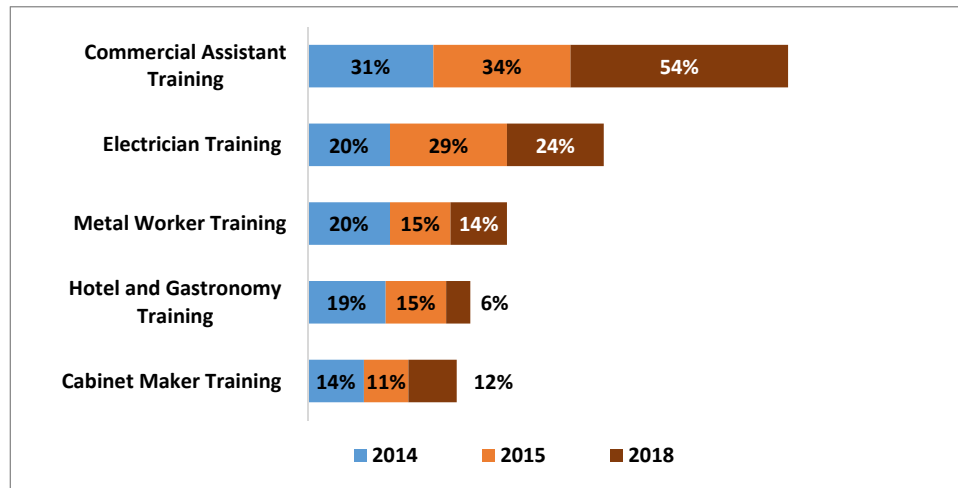
2.1 Satisfaction of the Employer

Employability

While 30% of the employers had nothing to say about the opportunities of CVT graduates, as many as 29% stated they usually raise salary of CVT graduates or even promotes providing that one can approve himself to be capable of doing more and qualified enough. Employers reported other options such as CVT graduates can move to other departments to apply the newly equipped skills. There are a few employers who raised salary of CVT graduate even without a promotion whereas there is one employer who said salary is different between an employee who is just one year into CVT program and an employee who has successfully finished the program after three years.

Expertise, Work Experience and Reliability

Figure 1: Training Programs



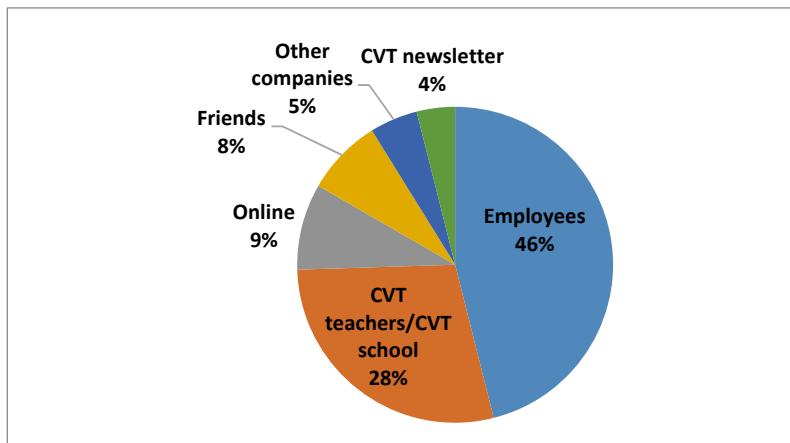
Regarding training programs the employers are sending their employees to, there is a little variation in this year survey compared to past two surveys. Commercial Assistant program topped the list with 54% followed by EL (24%), MW (14%), CM (12%), and H&G (6%).

Upon completion of the program after three years, a greater share of employers (48%) expects to see graduates' skills upgraded, productivity increased, and performance enhanced. Furthermore, a quarter expects their employees to work in a more organized manner and become well-equipped with required skills - finely tuned social skills and emotional skills in addition to knowledge on subjects and technological skills. As many as 19% would like to see CVT improves their personality and attitudes toward different situations and people as well as communication skills. Some sent their employees to CVT to excel at skills needed for the job whereas some sent simply because their employees are interested. To sum up, the survey conveys that while majority of employers are

aware that performance can greatly vary depending on individuals, generally, employers expect CVT graduates to gain deeper understanding on specific subjects, work faster, and at the same time deliver quality work.

Source of Information about CVT

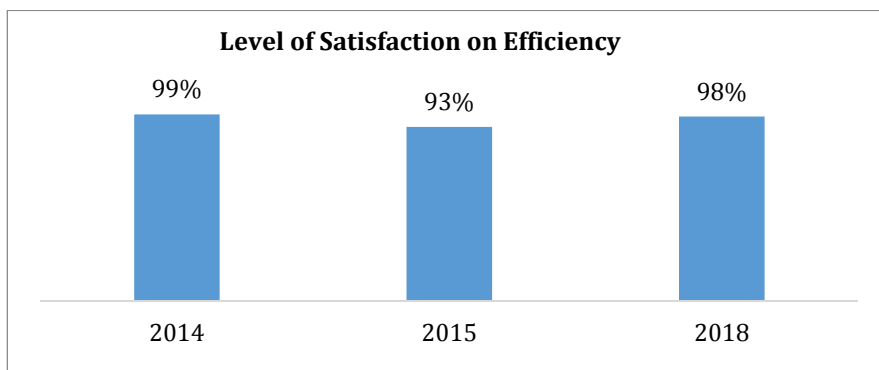
Figure 2: Source of information about CVT



The results suggest that employers mostly know about CVT from their employees. More than a quarter (29%) said CVT teachers came and introduced the programs at CVT at their companies. Other ways include online, friends – among social circles and business friends, other companies, and finally, CVT newsletter.

Level of Satisfaction on Capacity

Figure 3: Level of satisfaction on capacity

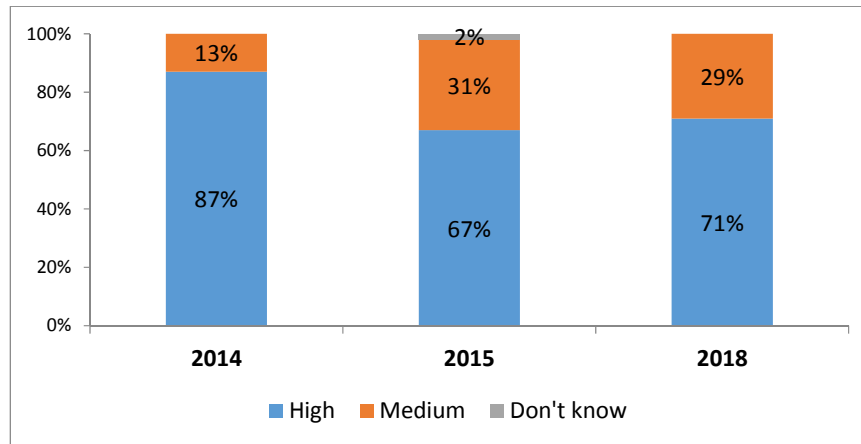


As high as 98% of the employers think the CVT graduates from their companies have increased their capacity at work whereas 2% of them do not think the efficiency has increased. Compared to 2015, the level of satisfaction on graduates' efficiency has jumped by 5 percentage points.

2.2 Impact of the CVT Training

Performance

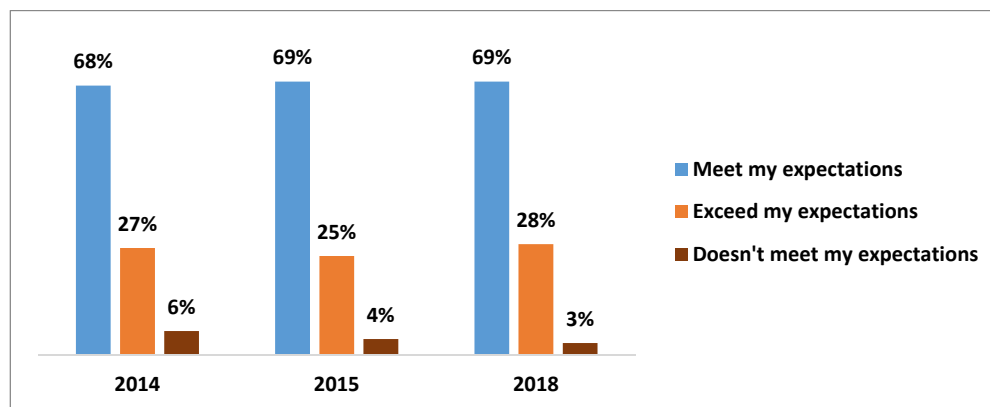
Figure 4: Level of satisfaction regarding efficiency and productivity



Regarding efficiency and productivity, the figure indicates 71% of the respondents are highly satisfied whereas 29% have a medium level of satisfaction. Compared to 2015, there is a growth in percentage of employers with high satisfaction – upped from 67% in 2015 to 71% in 2018.

Quality as Perceived by Companies

Figure 5: Fulfilment of Companies' Expectation from CVT's Trainings



There is a little variation in three years regarding the fulfillment of companies' expectation from CVT's trainings. In 2018, 28% of the respondents stated that the training exceeded their expectations; 69% stated that it met their expectation; 3% said the training did not meet their expectations.

Difficulties faced in selecting employees

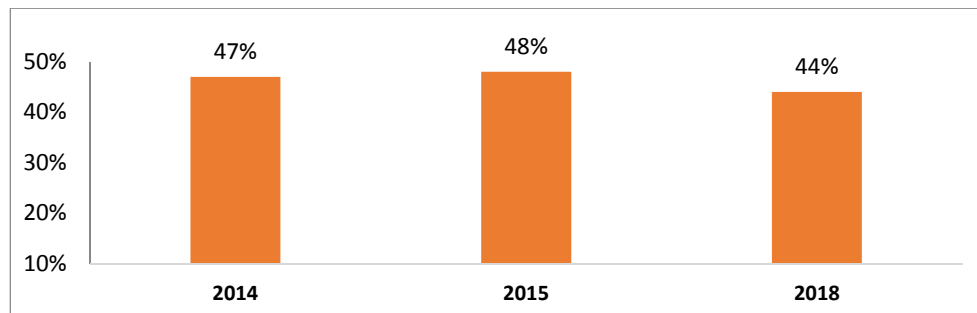
Two-thirds (67%) of the employers did not experience any difficulties in selecting employees to send to CVT. Meanwhile, from the remaining, some difficulties are observed – 1) employees did not continue working at the company, instead quit immediately after the company paid for them 2) three years is quite long and for that, employers cannot send many employees 3) employers find that graduates are not really interested in the program they attended 4) employees do not meet application criteria, for example, employees haven't passed grade 8 yet 5) employers think CVT should be less strict on age criteria and instead younger people should be allowed 6) small business 7) employees are weak in English and worried they might not fit into the teaching environment at CVT. 96% of the employers reported they paid their employees while they were on PTC at CVT. Of those who didn't pay their employees, two stated they are daily wageworkers whereas one said his business was a small business and it was difficult for him to pay wages for days at CVT.

Applicability of a Dual Training Program

More respondents reported benefits and rather suggestions than challenges. While a clear majority of employers recognized the effectiveness of the practical learning, they would like to have duration for practical training increased up to two times more than the current duration. They stated dual track system helped the students gain knowledge on safety awareness and risk factors. Employees have become much more reliable, accelerated their decision making and operation of assigned tasks.

Promotion of graduates

Figure 6: Share of employers that say they promote CVT graduates



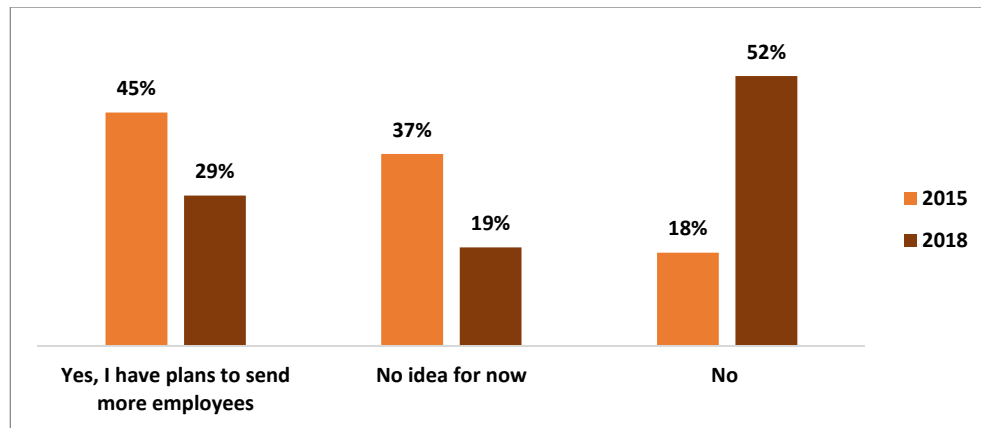
Compared to the last survey, the number of employers who promote their employees who have finished CVT programs in 2018 is declining – down from 48% in 2015 to 44% in 2018.

Among those 44% who promoted their employees, nearly three-quarters (73%) said they promoted their employees as they had become more productive. Some other reasons include – 1) better communication 2) increased reliability 3) better English.

From those who didn't promote their employees, one third (36%) said it solely depends on individuals and their performance as they believe the level of productivity largely varies among individuals. Some other reasons include – 1) the business is a small business 2) employees quit right after the program 3) salary is to be increased only if the employee has a certificate including the government recognition 4) there is a fixed promotion period.

Plans to send more employees

Figure 7: Share of employers on sending more employees to CVT



The results indicate that compared to 2015, employers are feeling less optimistic about CVT and its programs. Compared to 2015, there is a decline in number of employers who have plans to send more employees to CVT – down from 45% in 2015 to 29% in 2018. Meanwhile, more than half (52%) of the employers responded “No” in 2018.

Employers (29%) responded “Yes” as they recognized the effectiveness of the dual track system and teaching system as a whole. They stated several other insightful reasons – 1) employees become more efficient 2) they have plan to expand their business and need more skillful staff 3) areas of study to fit their business needs 4) in correspondence with the international standard curriculum.

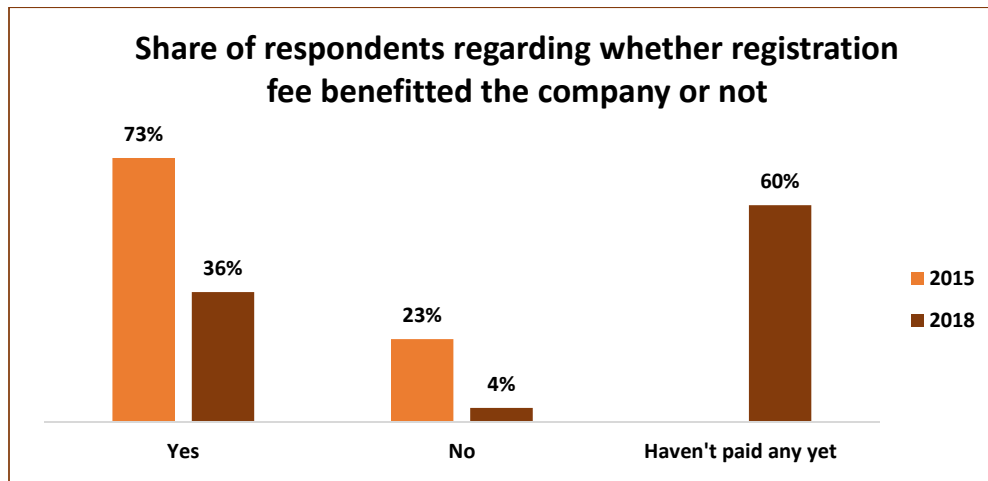
In general, employers are satisfied with the gained knowledge and applicable skills CVT graduates bring to the workplace. However, while employers agree that the capacity of their employees have visibly increased, more than half of them are rather unsure to send more employees in coming years, mainly because of slow business growth, long-term duration of the CVT program, and high turnover rate after the program.

For nearly a quarter (23%) of those who said they are not sending their employees to CVT, their main reason is that they are not sending simply because employees do not want to attend. Other common reasons include 1) employees quit after graduation 2) the duration of the program is long 3) employees are not interested in education 4) the business is a small business and employers cannot afford to pay fees for enrolment 5) employer thinks on-the-job training is enough 6) bad business – the company is close to shutting down 7) the employer doesn't have spare money, time or labor to select some employees to send to CVT 8) duration of the program is quite long.

Meanwhile, among 19% who do not have any idea at the moment, 48% said that they will send their employees to CVT given that there is a request. Another 37% reported that they will send more given that the business grows. One stated he would be interested if there is any scholarship program while one said his business does not have permanent employees and instead, hires only daily wageworkers.

2.3 Opinion on Financial Contribution

Figure 8: Registration fee have benefitted to Company



Compared to 2015, the share of respondents who are willing to contribute a registration fee of \$100 to CVT from 2015 to 2020 has fallen – down from 73% in 2015 to 36% in 2018. Meanwhile, there are 60% of the employers who have not paid anything to CVT yet. The survey finds that only large companies with workforce above 100 people do not find registration fees difficult as opposed to majority of small companies (Annex 3: Figure 3). In addition, some JVs companies completely understand the practice of collecting registration fees and complained nothing regarding this in contrast to many small to medium local companies.

Opinion on annual fee

93% of the employers chose “No” referring they had no difficulty to contribute annual fee of \$100 per employee as opposed to six employers reporting their business was still small and not much profitable and one who said he had to send many apprentices. However, here one should note that only 20% of the employers fully sponsor – pay for both registration and program fee of \$100 per employee. (Refer to Findings and Recommendations section of Training Company – Employer). Nearly half (43%) prefer two times in a year – bi-annually, followed by one time in a year (25%), four times in a year – quarterly (13%), and three times in a year (11%).

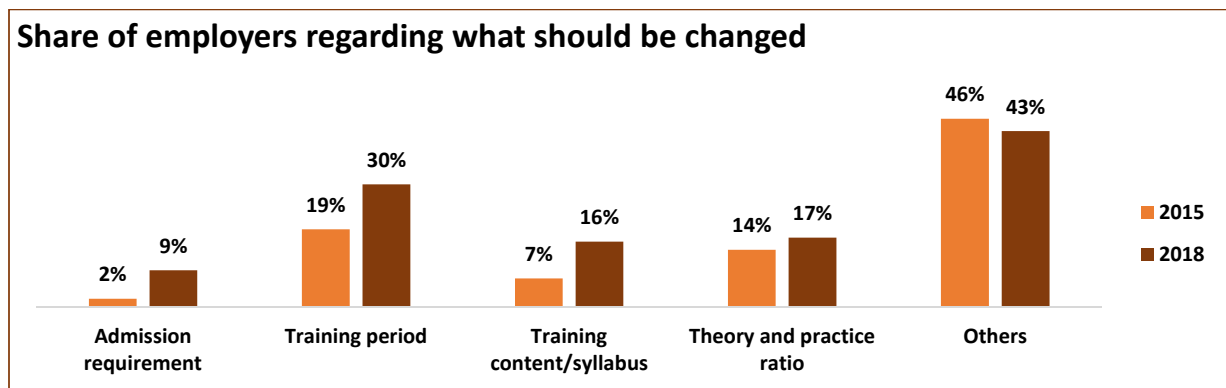
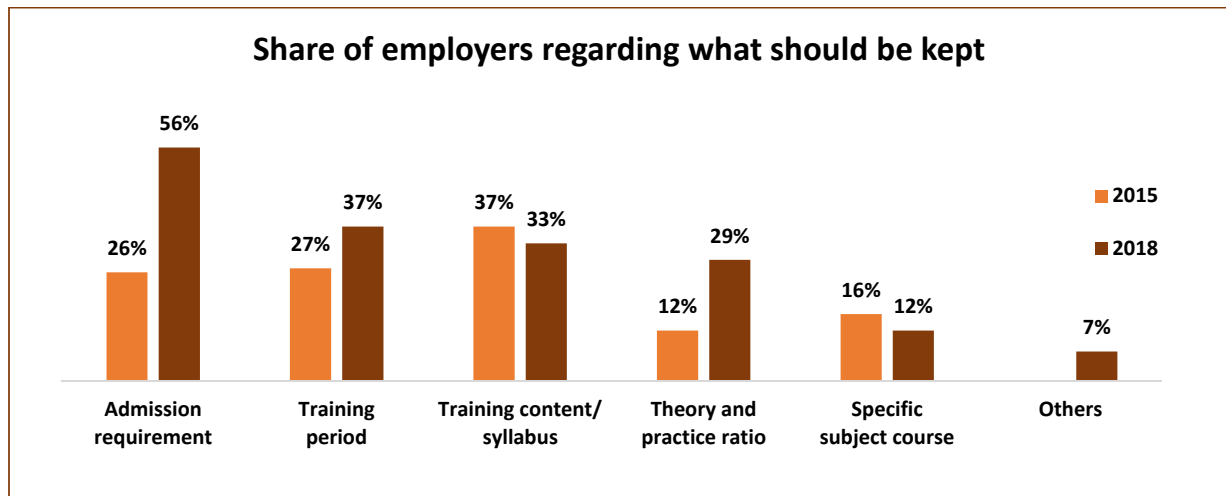
Opinion on further donation

64% of the respondents are willing to make a donation. From this group, 77% of them would like to make yearly donation while 23% of them prefer monthly donation. Of those who have desire for donation, 38% suggested donating between 50,001 and 100,000 Kyats. Another 28% can afford to donate less than 50,000 Kyats. 8% is willing to donate 100,001 and 200,000 Kyats while 6% suggested more than 300,000 Kyats. Only 2% stated that they would donate between 200,001 and 300,000 Kyats.

The remaining stated they needed to discuss internally again to tell the amount and that they were not sure about it at the time of the survey.

2.4 Opinion on the program

Figure 9: Share of employers regarding what should be kept or changed



Admission requirement and training content/syllabus remain the most cited materials to be kept with 56%. Compared with 2015, employers are more likely to want to keep the training period the way it is – jumped from 27% in 2015 to 37% in 2018, as opposed to how employees think (figure 26). More employers clearly see theory and practice ratio should be maintained than changed (29% vs. 17%), as opposed to the view of employees. (figure 27).

The view on admission requirement by employers fully reflects how employees think. Respondents see entrance exam is essential as it allows one to assess his or her current knowledge and intelligence level which also helps CVT to ensure the right students get in. Employers reported the current situation is good enough and that CVT should keep up the good work. Meanwhile, six employers from those who want to change admission requirement group said education requirement should be reduced to 8th standard instead of 10th standard, whereas one suggested a personal interview instead of the entrance exam.

More employers want to keep the current training period – one day a week – as they are worried working hours would be reduced or employees would take more leave days to keep up with both work and life. However, 13% of the employers think the training period should be shortened – six months to one year. A few suggested options for time allocation – one day a week but only one year; one day a week for two years; two days a week but only six months; three days a week in early morning or late evening. Two employers stated CVT should provide fixed attendance requirement after negotiation with respective companies. One employer said in order for the program to be more effective, one day for theory class should be immediately followed after one day theory class.

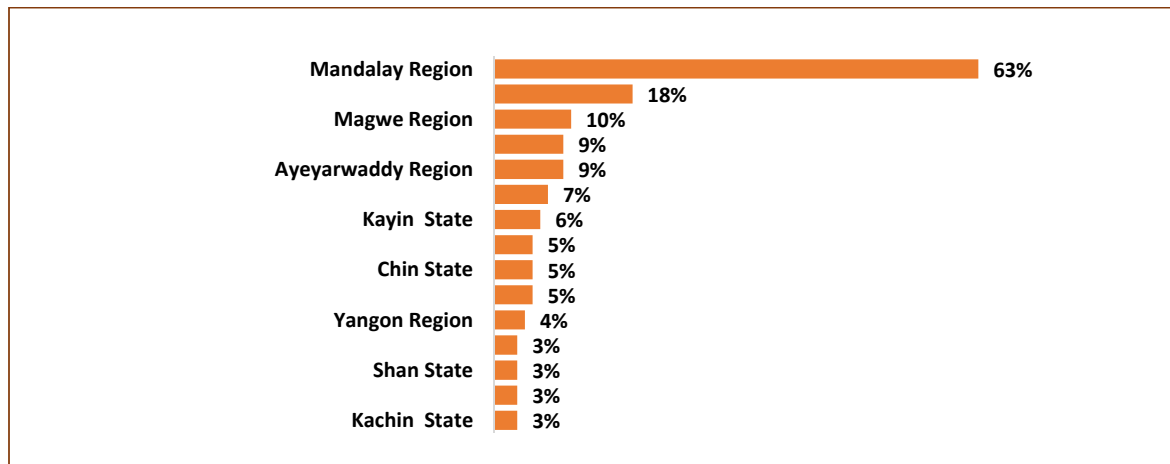
Among those 33% who think CVT should keep the current training content and syllabus, 14% said it is quite good but they would appreciate if CVT considers updating it to the latest one for each program any time soon. Another 21% like the curriculum as it is in correspondence with the international standards. A few (6%) said CVT should maintain useful teaching materials and methods such as drawing aids, presentation slides, complete and well-prepared handouts, general knowledge sharing, and mathematics teaching. Meanwhile, 7% of the employers believe curriculum update, especially for Electrician program is much needed – computer numerical control (CNC) system utilized machines should be introduced whereas different subjects on welding – arc welding, TIG welding should be included as well.

While 8% of the employers feel more practical works are needed and that duration for practical works should be increased, one thinks there is not a lot of connection between theory and practical works and that it should be fixed. Teaching aids for practical works should be properly allocated and safety subjects should be prioritized.

There are some other suggestions ranging from request to include recommendation from the government, and introduce handling/operating of modern machines that are high in demand, to lowering age limit.

2.5 Opinion on opening branches in Myanmar

Figure 10: Proposed Region and State to open CVT branches

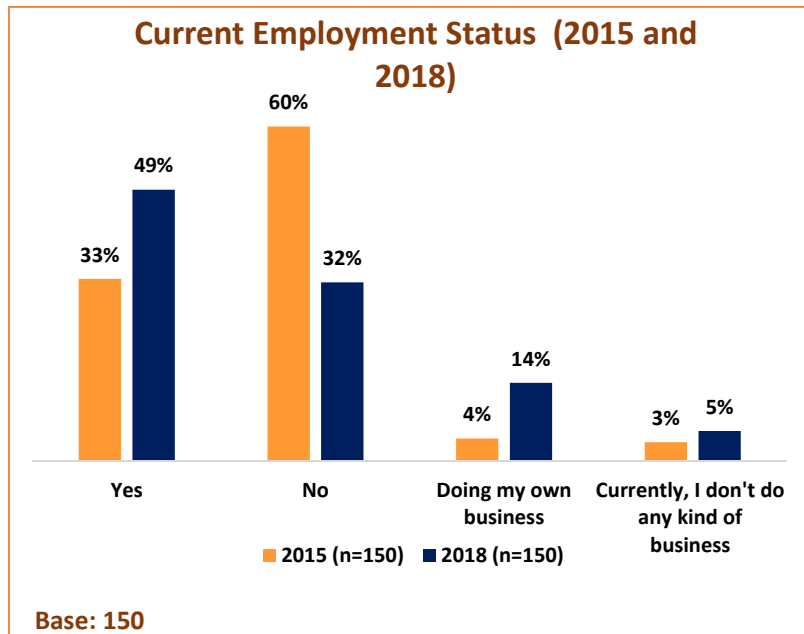


Mandalay Region is cited to be the most preferred region to open a branch. The reasons provided for Mandalay Region include – 1) Mandalay is a commercial city and it is at an economically advantaged location 2) there are industrial zone areas 3) large youth population 4) many hotels and densely populated region – better business opportunities 5) Mandalay is a city that encourages handmade businesses 6) high demand – many young people who are in need of vocational education in upper Myanmar. The reason provided for expansion into Magwe Region include – 1) large youth population 2) young people in the region are in need of vocational education and intellectual skills and knowledge to gain deeper understanding on business 3) need to create many job opportunities 4) should be accessible to many youths in the region 5) densely populated region. The reasons for expansion in Ayeyarwaddy region include – 1) large youth population and shortage of teachers 2) densely populated region 3) businesses related to bamboo and wood are increasing in Mawlamyine and Patheingyi. Generally, the research pinpoints that the mentioned regions need education access for the presence of young people, significant low rate of school enrolment and high school dropout rate, job creation purpose, and shortage of skilled labor.

3. CVT Graduate Apprentice

3.1 Current Employment Status

Figure 11: Current Employment Status



150 CVT Graduates

(104 male and 46 female)

60 - Commercial Assistant

23 - Cabinet Maker

41 - Electrician

11 - Hotel and Gastronomy

15 - Metal Worker

49% are working at the **same company** they worked for while attending the CVT program

32% are no longer with the same company during the program

The share of respondents that is still working at the same company they were working during CVT program has increased from 33% in 2015 to 49% in 2018, whereas those doing their own business has climbed from 4% in 2015 to 14% in 2018. In addition, 5% are not doing any kind of business this year, which shows a slight increase compared to 2015.

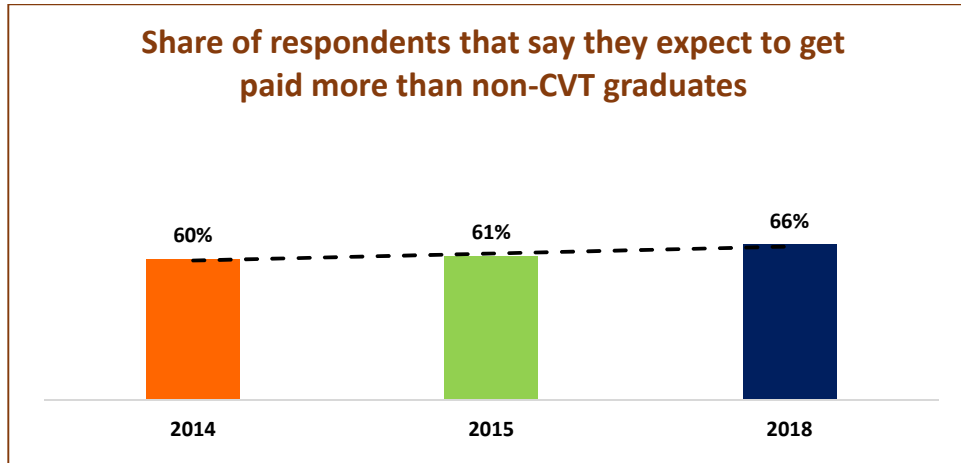
Nearly a fourth (22%) stated that “higher salary” was the main reason for career shift. Respondents are actively seeking jobs that match their gained knowledge and skills after the program. Some said it is the problem with their business – business is not going quite well while some quit as they consider their future career progress – for better job opportunities and more experience – and the current company is not the right place for them. In addition, there are some scenarios such as even if they think they should be promoted, the company would neither promote nor increase salary. A few said the location was the issue – workplace is quite far from their house. The other reasons include 1) no holidays 2) high pressure 3) business was stopped 4) unfavorable working condition – for example, one worked at a paint store, but cannot stand the smell of paint 5) hard to fit into CVT schedule with the previous working hours 6) teachers from CVT shared career opportunities with students 7) the previous job was family business 8) the previous job didn’t require high exposure.

Among 5% of respondents who do not have any business currently, 75% (6 in total – 2 from CA, 2 from H&G and 2 from Metal Worker) are waiting for official employment recognition to transfer to another local company while 25% (2 in total – from CA) are preparing to go work abroad.

3.2 Satisfaction among apprentices

Reputation as CVT graduated apprentice

Figure 12: expect to get paid more than non-CVT graduates

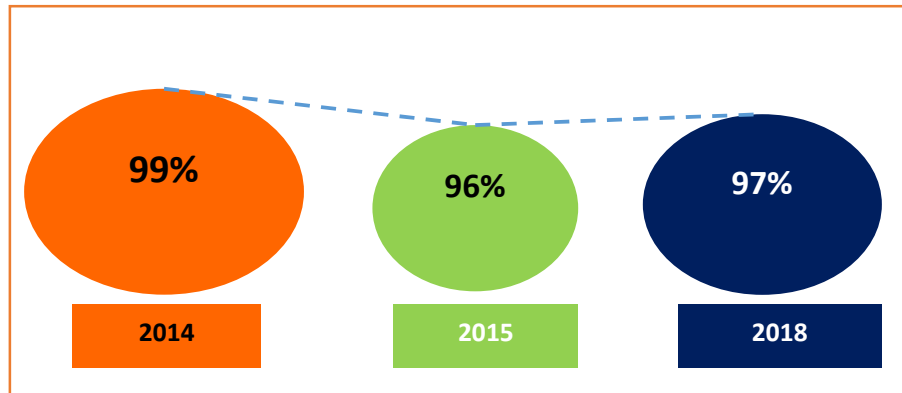


As many as 66% of the graduates expect to be paid better than non-CVT graduates this year 2018. Effectiveness of practical works that helped them gain real work experience topped the list with 26%. Another 25% said they are better skilled. Other common reasons include - 1) increased productivity – graduates work faster and produce quality work 2) quick and precise decision-making 3) CVT boosted their self-confidence – they know better; are willing to share and discuss ideas 4) commonly known and accepted situation in the market – CVT graduates are mostly demanded and get paid more than those who did not go to CVT 5) improvement in basic knowledge and understanding 6) employers recognized CVT graduates are reliable and good at time management - hitting deadlines 7) increased understanding on rules and work ethics.

Among those who do not expect to get a better paid than non-CVT graduates do, 47% simply do not regard themselves to be better than most at workplace. This is in response to the view that sees individuals differently with regard to their level of productivity. As well, they stated that there are some other employees who perform better than they do. Another 10% expressed that it is not right to promote or raise salary of CVT graduates while there are more skillful ones. Additional 8% said that years of experience played an important role in getting approved a pay raise. Some other stated reasons include 1) they are still inexperienced in every aspect – years of working and expertise 2) working for the government 3) taking part in family business 4) it is better if CVT provides a diploma instead of a certificate 5) it depends on continuous learning and thus, one does not expect to get paid better because of CVT certificate 6) one came to CVT to meet job's requirements and does not expect higher salary 7) the company one is working for is a start-up 8) salary is fixed according to positions – salary will not change without a promotion.

Employability

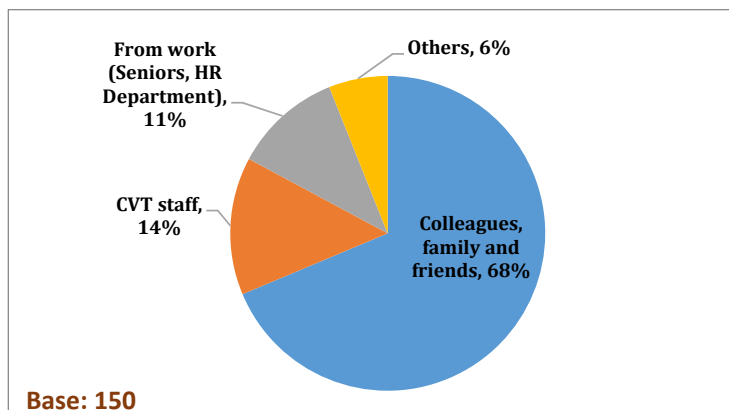
Figure 13: Share of the respondents that say CVT helped them become more employable (2014, 2015, and 2018)



The survey finds that employability has slightly increased this year compared to 2015. However, among three years – 2014, 2015 and 2018, 2014 remains the highest regarding both employability and pay rise.

Source of Information about CVT

Figure 14: Getting Information of CVT

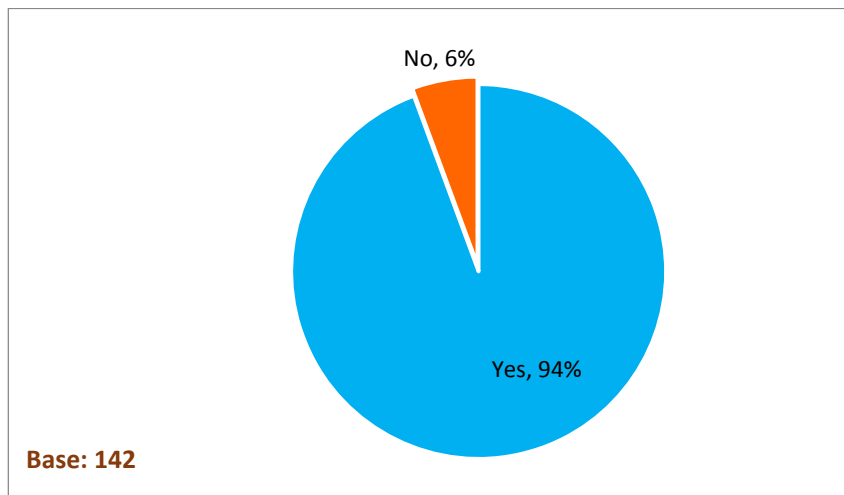


As many as 68% of the graduates heard about CVT from colleagues, family, and friends.

Others include newspaper/journal, Facebook, TV, pamphlet. Among 150 graduates, there is only one who said to have known about CVT from Facebook. The survey finds that graduates rarely receive information about CVT from Facebook, because most of them said their friends, CVT alumnis, and colleagues had already shared the news with them and that they are their original source of information. Instead, they only check the activities, highlights and stories on CVT facebook page from time to time.

Relevancy of CVT courses to current work

Figure 15: Share of respondents on relevancy of the program to the job (2018)



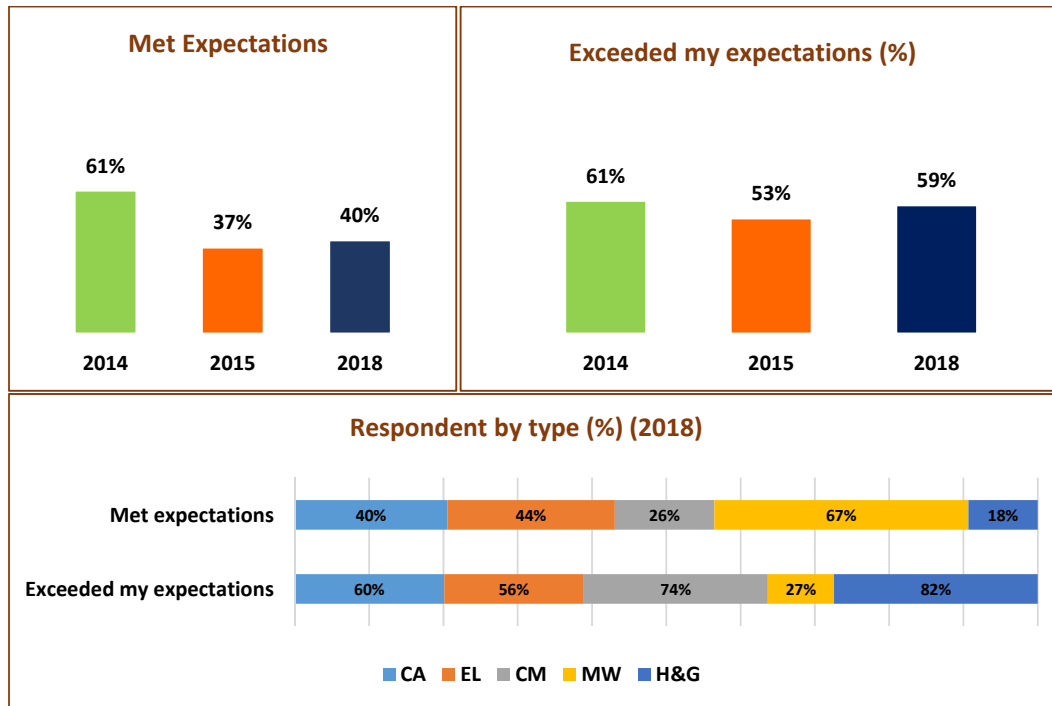
This year survey completely reflects the last survey in 2015 – 94% believe CVT program they attended is related to their job; 6% disagreed.

Majority of the respondents stated that they came to CVT to excel at skills needed at job. They recognized that with CVT certificate, they could have better job opportunities in their related fields. They feel employers quite welcome CVT graduates and it is recognized in foreign countries as well. In addition, they think it is important to learn fast and apply learned skills at the workplace at the same time. For this reason, they credit the dual track system at CVT as it allows them to test their gained knowledge from theory studies. Boss sends some of them while some chose to attend by themselves. The schedule mostly works for people with jobs as it takes only one day a week. They feel that practical works are much more useful than lecture in classroom.

Graduates from EL said they came to CVT to be proficient in electrical works – they would like to know update technology and controlling system; to know more about machines and how they work; to gain knowledge on air-conditioners; to learn theory systematically; to polish the skills and work as a professional. Graduates from MW said they mainly wanted to raise their education level and be recognized as a highly skilled worker in the market. As well, they think at CVT, they have a chance to learn in an organized manner – proper teaching, discussion, and questioning on one specific topic, as opposed to scattered pieces of knowledge they gained from the workplace outside. One from MW mentioned that he was interested as foreigners manage CVT and that it adopts an international standard curriculum. Graduates from H&G attended CVT program as CVT certificate is recognized in hotel industry; to learn about hotel culture and to gain useful basic grounding to have a career in hotel industry; to become an efficient manager.

Quality Theoretical Training & Documentation

Figure 16: Level of meeting expectation



Meeting Expectation

Compared to 2015, respondents who said CVT exceeded their expectations have increased by 6% from 53% in 2015 to 59% in 2018. As well, in 2015, 37% think CVT met their expectation whereas there are 40% in 2018.

Among those who said CVT exceeded their expectation, graduates from H&G stands at the top with 82%, followed by CM with 74%, CA with 60%, EL with 56% and MW with 27%.

Reasons for meeting expectation

Good curriculum and effective teaching system – dual track system – appear to be most attractive factors for CVT graduates. While graduates were eager to learn new things, they clearly view CVT education imparts strong general knowledge, which makes their time there worthwhile. Applicability at workplace, tremendous gain in knowledge on subject matter as well as general knowledge, and increased productivity as a result kept them motivated and highly satisfied throughout three years during the program.

All of the graduates believe that they have broadened their horizons, increased understanding on specific subjects, and acknowledged a big difference between before and after the program.

Many respondents, especially, the EL graduates mentioned that practical works increased their familiarity with machines and that they are working faster than before. In addition, they believe its detailed-oriented explanation allowed them to convey the complicated topics easily – drawing, setting up different light bulbs, and wiring. They highly value their time at CVT, especially practical lessons, as it gave them hands-on experience. They learned more about electrical topics – technology, safety, and controlling machines – through practical works than they did in the classroom.

Meanwhile, the CA graduates expressed that computer training, subjects on accounting, general knowledge, management, communication, and English language training, office letter writing visibly enhanced their performance. To add, they enjoyed doing presentation once a year. They find one particular experience very useful – they had to prepare and submit a report on their internship experience to CVT.

As many as 35% of the CM graduates expressed that CVT’s step-by-step approach guided them to work systematically with less time and without waste of materials and resources. Additional 12% stated that they liked to learn about new systems and theories that assisted in building basic knowledge.

The MW graduates are also particularly satisfied with the fact that they have become much more knowledgeable and are able to cope with higher workloads. They expressed their appreciation for CVT regarding drawing, interpreting drawing, measurements, calculation formulas. The MW graduates also said that CVT taught stuff that they had never learned at factories they worked before. The graduates learned about welding, milling machines and how machines work and their bits and pieces are set up.

The H&G graduates are happy with CVT as the program gives useful basic grounding relating to hotel industry. Food presentation, cooking, and customer service lessons were thoroughly delivered. Practical works such as food preparation, cooking were conducted once a year and it took two weeks – 3 days a week when they were assigned at the training location for one week and later at a hotel for another one week.

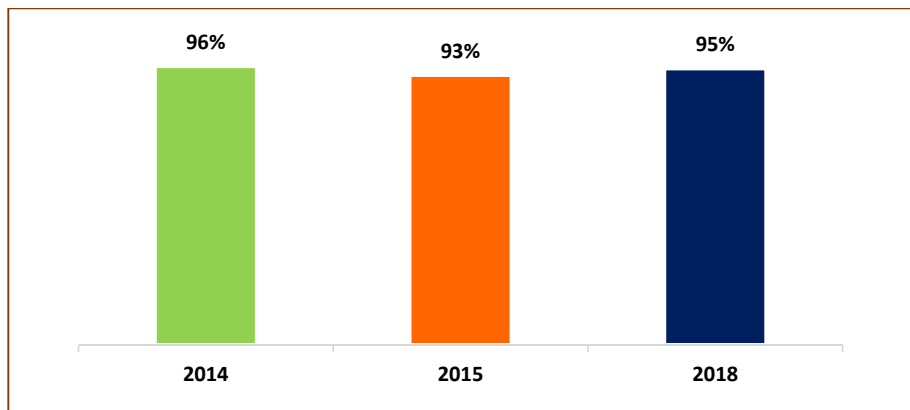
Practical Training

33% of the respondents think allocation of more time for practical lessons is to be realised. A majority feel that CVT should have own practical rooms or space for students and have them learn both at the same place. Respondents said practical duration should be increased and time allocation between theory and practical classes should be balanced – they think theory classes are taking a lot more time than practical classes currently. Some think there are many areas they do not know even after 3 years, namely, improvement in teaching regarding drawing, IT works, and introducing CNC machines would be much appreciated.

33% say they want to extend the PTC's training duration

Teachers & Trainers

Figure 17: Share of respondents that rated "High" on satisfaction with capacity of trainers



In general, respondents greatly show optimism toward capacity of trainers in all three surveys.

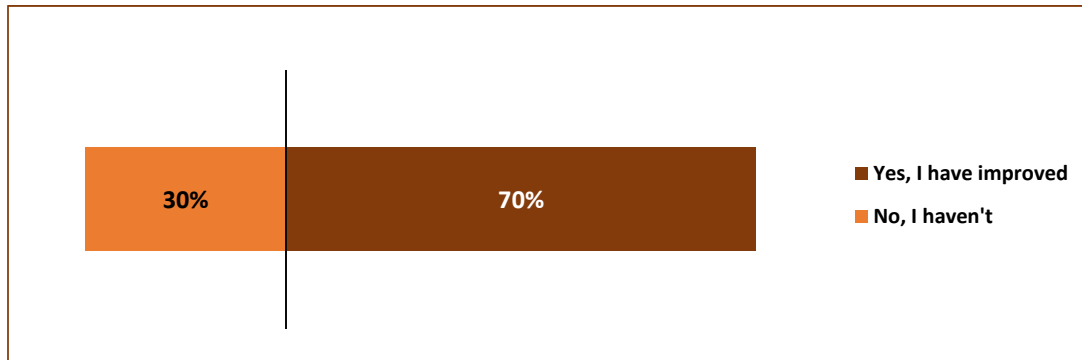
A clear majority are positively affected by teaching system and teachers. The survey finds that the graduates has a special liking for trainers regarding their strong interest in teaching and interaction with students – 25% of the graduates feel trainers are passionate about their job – teaching – and devoted their time and effort to ensure students achieved better performance both in class and at work. As well, they stated trainers as friendly. The graduates stated they had close relationship with them. Additional 13% said trainers share everything they know whereas another 12 % said trainers are patient, active listeners, responsive, persuasive and have both soft skills and hard skills. Other common reasons include: 1) detailed, clear and systematic teaching 2) caring trainers – listen to issues and give advices on both work and life problems 3) student-centered teaching 4) interactive teaching – trainers encourage students to involve in discussions and share ideas 5) trainers invite students to ask questions 6) teaching critical thinking 7) trainers check up on students given that they miss the class 8) trainers help with revision to prepare for exams 9) trainers are focused on building good characters and personality 10) teach the importance of teamwork.

In contrast, 5% of them (7 in total) have medium satisfaction as good teachers quit mid-way of the program.

3.3 Impact of the CVT training

Improvement after training

Figure 18: Share of respondents on improvement after CVT graduation



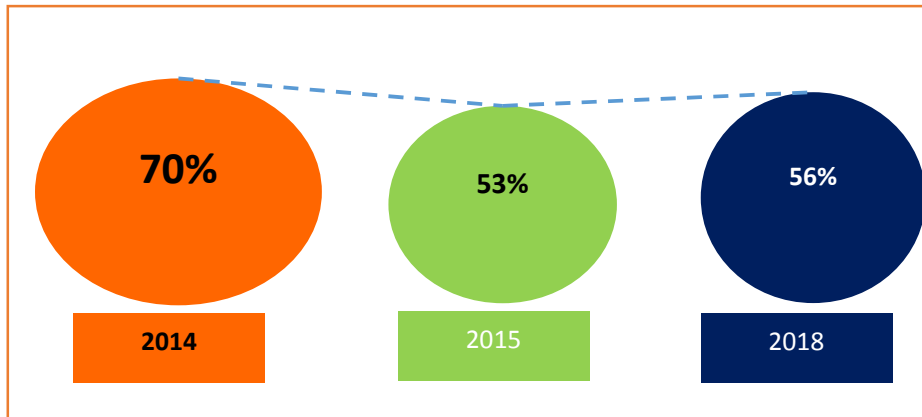
70% of the respondents feel they have improved after CVT graduation as they experience recognition from their respective works, either salary increment or promotion, as well as verbal recognition from seniors. They have improvement in communication skills, leadership skills, English skills, basic understandings on specific subjects.

Respondents stated that the main reason for their success lies on the fact that they tried hard to attend the programs regularly and not miss a class. They consider teacher-student interaction is very important and it is only available in class. They also built networks and made a lot of friends during their time at CVT. Their social skills have noticeably improved which help a great deal in finding talents and building relationships.

In contrast, 30% of the graduates feel they have not improved of which 47% highlighted they had not witnessed any tangible development yet, either a promotion or a raise in salary. Meanwhile 11% stated they were finding a new job and feeling discouraged at the time of the survey. An additional 11% said they were still working as part-time workers. A few said they have not had a chance to apply their equipped skills at work either because they are not confident enough or the job does not require those skills yet. Other common reasons include – 1) a fresh graduate and has not entered any industry yet 2) what is learned at CVT is not related to work 3) business is failing.

Promotion or Pay Rise

Figure 19: Share of respondents on improvement after CVT graduation

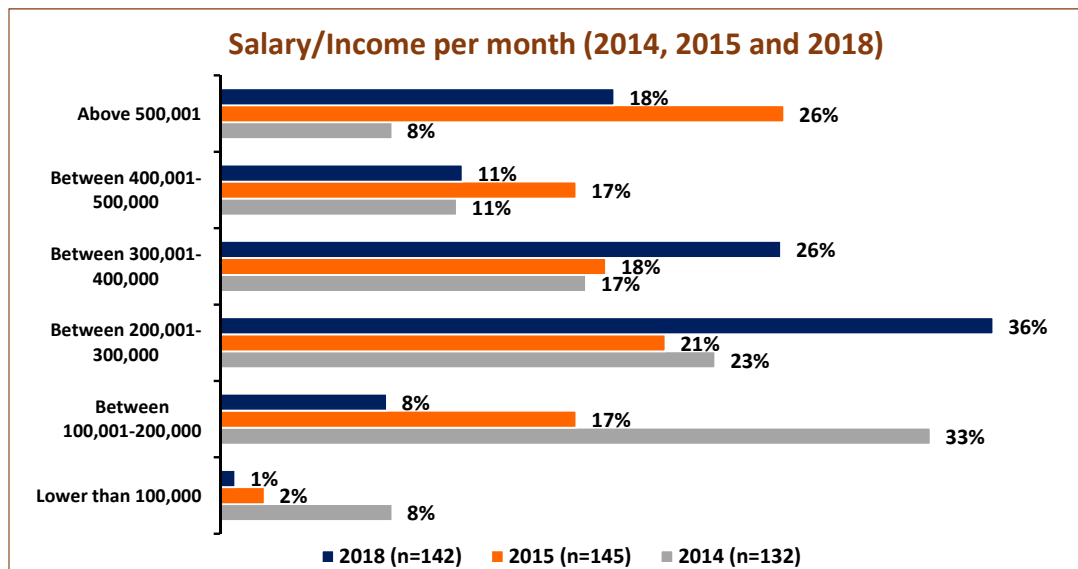


The research finds that while promotion heavily depends on individuals and their level of productivity as well as years of experience, more CVT graduates had pay raise than non-CVT graduates. Salary of CA graduates upped by at least 50,000 Kyats to at most 70,000 Kyats, while salary for H&G upped by at least 30,000 Kyats to at most 70,000 Kyats. Most of the CM and EL graduates are daily wageworkers. Regardless, they also had pay rise – daily wage upped to 7,000 Kyats after CVT from 5,000 Kyats before.

Income

Salary Comparison in 3 years – 2014, 2015 and 2018

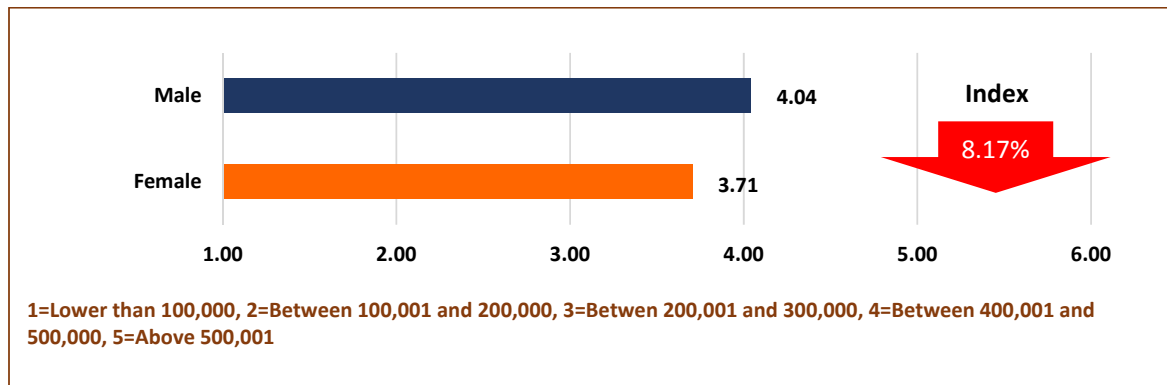
Figure 20: Respondent's Salary/Income per month



In 2018, more respondents are earning between 200,001 and 300,000 Kyats with 36%, followed by between 300,001 and 400,000 Kyats with 26%. In contrast, more respondents (26%) earned above 500,001 in 2015, followed by between 200,001 and 300,000 Kyats with 21%. Compared to 2015, less graduates are earning above 500,001 Kyats. However, only one respondent earned below 100,000 Kyats in 2018.

Indeed, in 2018 survey, more graduates are daily wageworkers and appear to be earning between 200,001 and 300,000 Kyats on average. Most of the daily wageworkers work 20 days on average. Accordingly, income was calculated by taking the total number of days they worked in a month.

Figure 21: Salary by Gender (2018)



According to the 2018 figure, female respondents appear to be earning less than their male counterparts are. The index indicates female earnings are down by 8.17% compared to male earnings. Compared to 2015, there is a decrease in number of females making 400,000 and above – 10% decrease in 400,001-500,000 range; 13% decrease in above 500,001 range. Instead, compared to 2015, more females shift to between 200,001 and 300,000 Kyats range compared to their male counterparts in 2018.

In beyond 300,001 Kyats ranges, more male respondents are observed. Significantly, in 2018, more males than females earned between 400,001 and 500,000 kyats (14% vs. 5%). In contrast, less males than females are observed in the range – between 100,001 and 200,000 Kyats (5% vs. 15%).

Long-Term Work Contract

49% are working at the same company they worked for while attending the CVT program. 32% are no longer with the same company during the program.

Payment by Employers

Figure 22: Share of the respondents that say they had salary throughout 3 years and got paid while on PTC at CVT

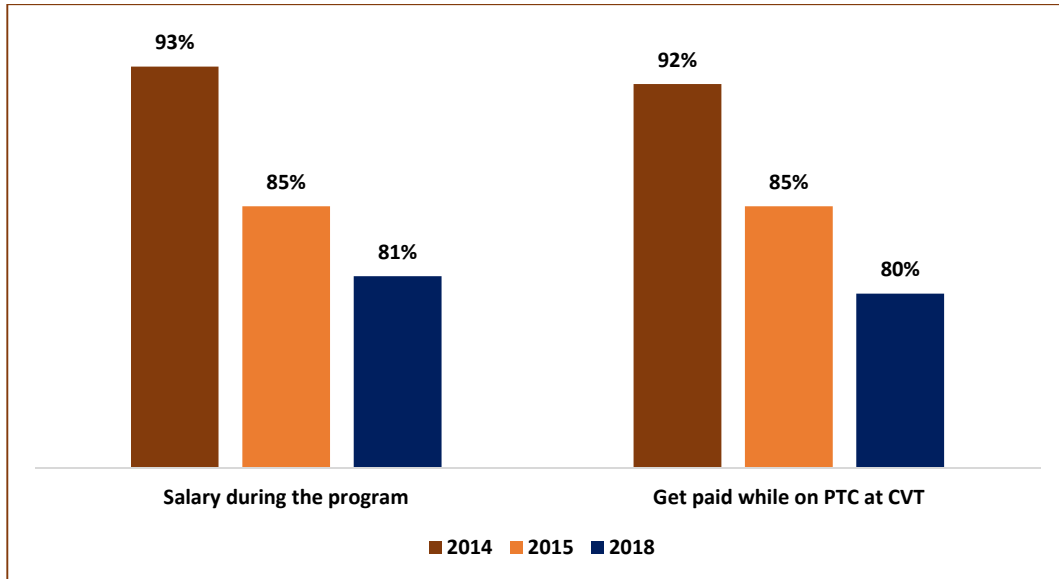


Figure 23: Share of respondents by type that say they had salary throughout 3 years (2018)

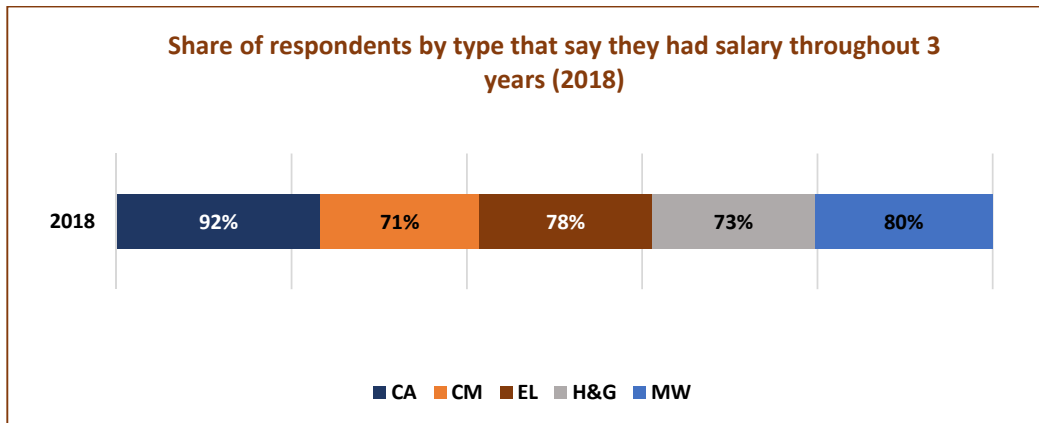
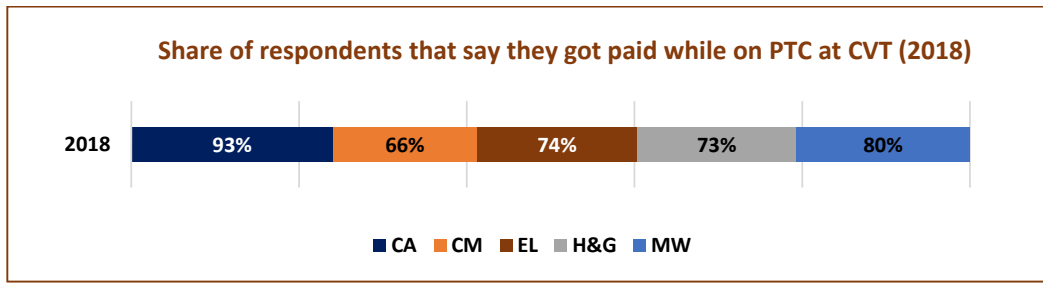


Figure 24: Share of respondents that say they got paid while on PTC at CVT

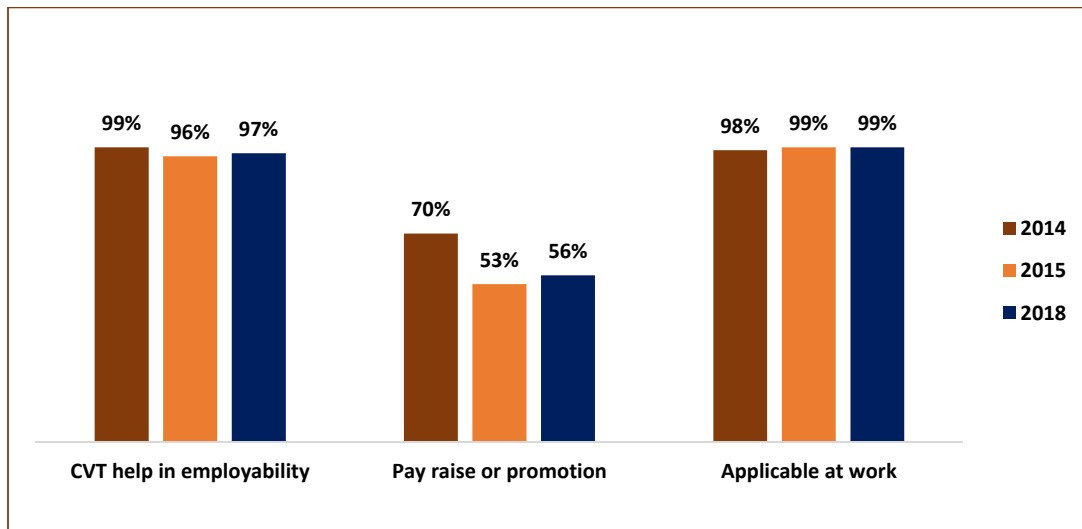


Among three years, 2018 has the least number of people who got salary throughout three years during the program as well as paid while they were in PTC at CVT.

By respondent type, there is little variation in percentages on two scenarios – salary during the program and being paid while on PTC. CA (Commercial Assistant) tops the list while the descending order is as follows – MW (Metal Worker), EL (Electrician), H&G (Hotel & Gastronomy), and CM (Cabinet Maker). The reason behind is majority of MW, EL and CM are part-time workers/daily wageworkers and they are not salaried, but rather paid their wage upon completion of tasks. It is learned that they are given some pocket money and transportation cost – no more than 20,000 to 30,000 Kyats.

Impact of CVT training on graduates

Figure 25: Comparison of three years on impact of CVT training on CVT graduated apprentices (2014, 2015, 2018)



3.4 Opinion on the program

Figure 26: Share of respondents regarding what should be kept at CVT (2015, 2018)

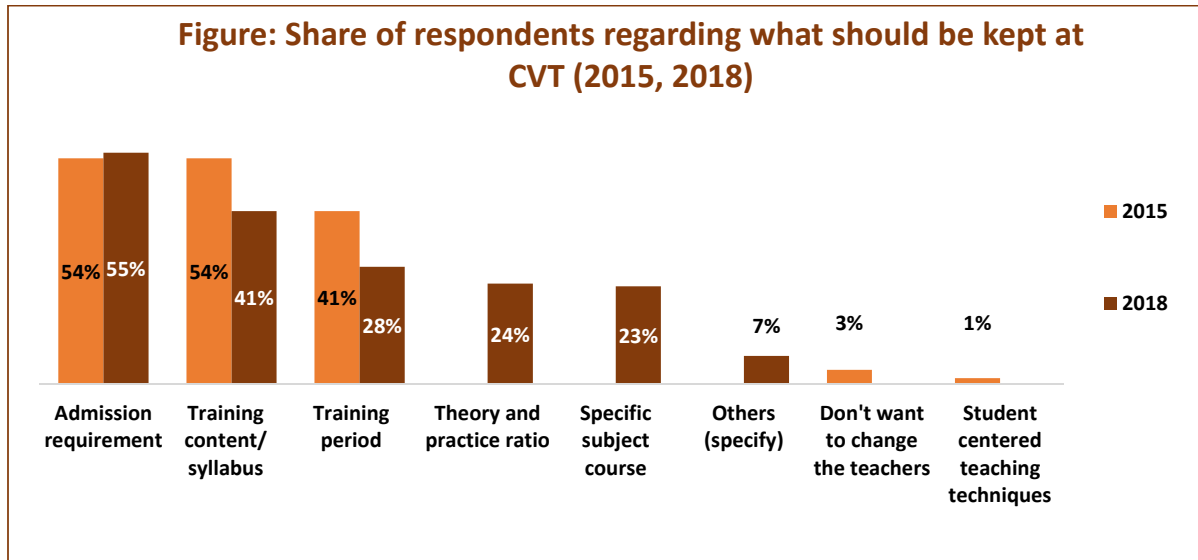
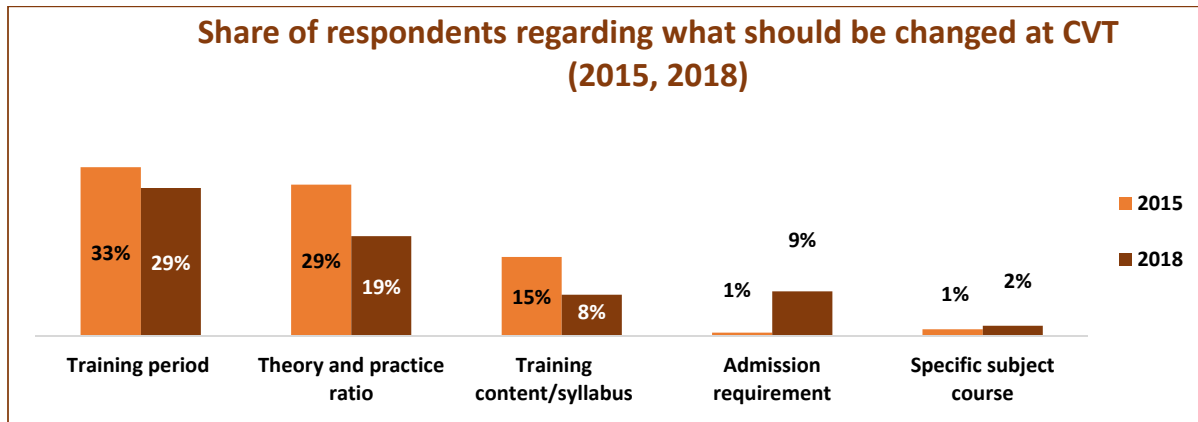


Figure 27: Share of respondents regarding what should be changed at CVT



Admission requirement and training content/syllabus remain the most cited materials to be kept. Compared with 2015, respondents are less likely to want to keep the training period the way it is – down from 41% in 2015 to 28% in 2018. While respondents clearly see specific subject course should be maintained, they want to see moderate changes regarding theory and practice ratio.

Respondents view admission requirement as an essential tool to filter quality students. They believe only with admission exams, CVT will be able to assess students' current intelligence level and ensure the right ones get in. Here, respondents think it is very important for CVT to match the students' interest and their career prospects with the program they are going to join and spend there for three years. While as many as 28% of the respondents think training period should be kept the way it is as one day a week schedule mostly works for people with jobs, there are also several changes proposed

on this. As opposed to the 28%, another 29% would like to change the training period, particularly because they think three years is simply a bit too long to get a certificate. They suggest to reduce it to 1.5 to 2 years – two days a week instead of one day a week – one day for theory class and another one for practical class. A majority of the respondents from this group clearly see CVT program duration is longer than other schools and that there are obvious negative effects – many students drop out of the program for its long duration. Respondents are also eager to allocate more time on practical class and do it at the same place with theory class. Meanwhile, they also want to be benefitted from learning a variety of advanced technology machines and equipment.

4. Young Entrepreneurs for Myanmar (YE4M)

4.1 Satisfaction of the Students

Overall Grade

Overall, about one in seven (15%) out of a total of 41 respondents rated YE4M program as “excellent” or “very good.” Half of the respondents rated it as “good.” 27% indicated it as “pass” while 10% highlighted it as “average,” and there is room for improvement. (Annex-8: Figure-11)

Quality of the training

Majority 90% of the respondents “strongly agree” or “agree” that the training covered the topics they wanted to learn while 93% “strongly agree” or “agree” that the training was well structured. 10% are undecided – not sure, whether the training covered the topic that they learned or not whereas two respondents (5%) did not think the training was well structured. (Annex 8: Figure-1 and 2).

With regards to training materials such as curriculum and handouts, majority 95% of the respondents “strongly agree” or “agree” that they are useful and easy to understand. In the case of the training length, more than half, 56% to be exact, “strongly agree” or “agree” that it is sufficient to deliver the intended content. 27% clearly sees that the training length is not sufficient at all while 17% are rather neutral about it.

Teachers and Trainers

Overall, the respondents feel that teaching methods used during the training, for example, pair and group work, brainstorming, small group discussions, role-plays, games, quizzes are useful to deepen the understanding of the training content. Regarding business trainers, indeed, 95% of those surveyed reported they are adequately prepared for their lessons and certainly confident about themselves while 5% are undecided.

When it comes to competency of teachers and trainers, the greater percentage 78% of the respondents feel satisfied about the way their questions related to the content of the sessions are answered; 7% of them disagreed.

Of those surveyed, 71% said that language used by business trainers are understandable and complicated terms are also properly explained using practical examples whereas 29% strongly agree on the matter.

Training Venue

Indeed, three quarters (78%) of those surveyed “strongly agree” or “agree” that the training venue was conducive for learning. However, about one out of ten (9%) “Disagree” or “strongly disagree” with it. The rest 12% do not have anything to say.

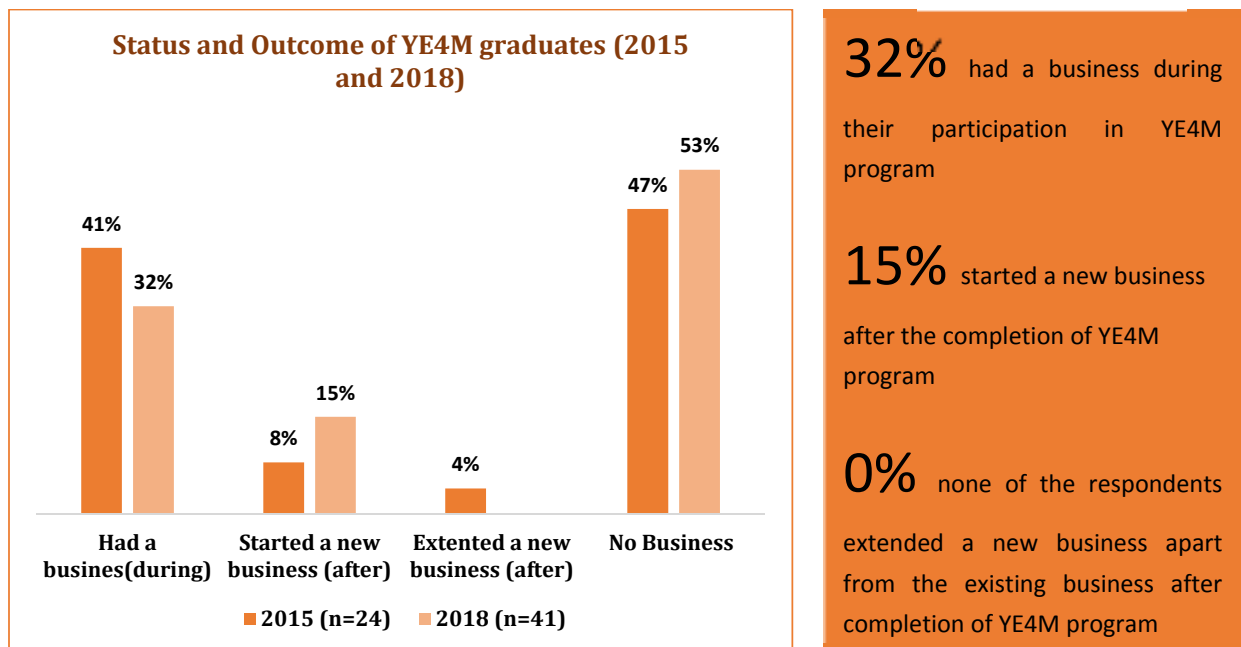
Overall Impression

When asked if they would recommend the program (Young Entrepreneur for Myanmar – YE4M) to others, vast majority 98% of them “strongly agree” or “agree” while mere 2% disagree.

4.2 Impact of the CVT training

More than half, 54% of the respondents have not had their own business during and after the program. Nearly a third 32% had a business during their participation whereas just 15% started a new business after completion of the program.

Figure 28: Status and Outcome of YE4M graduates



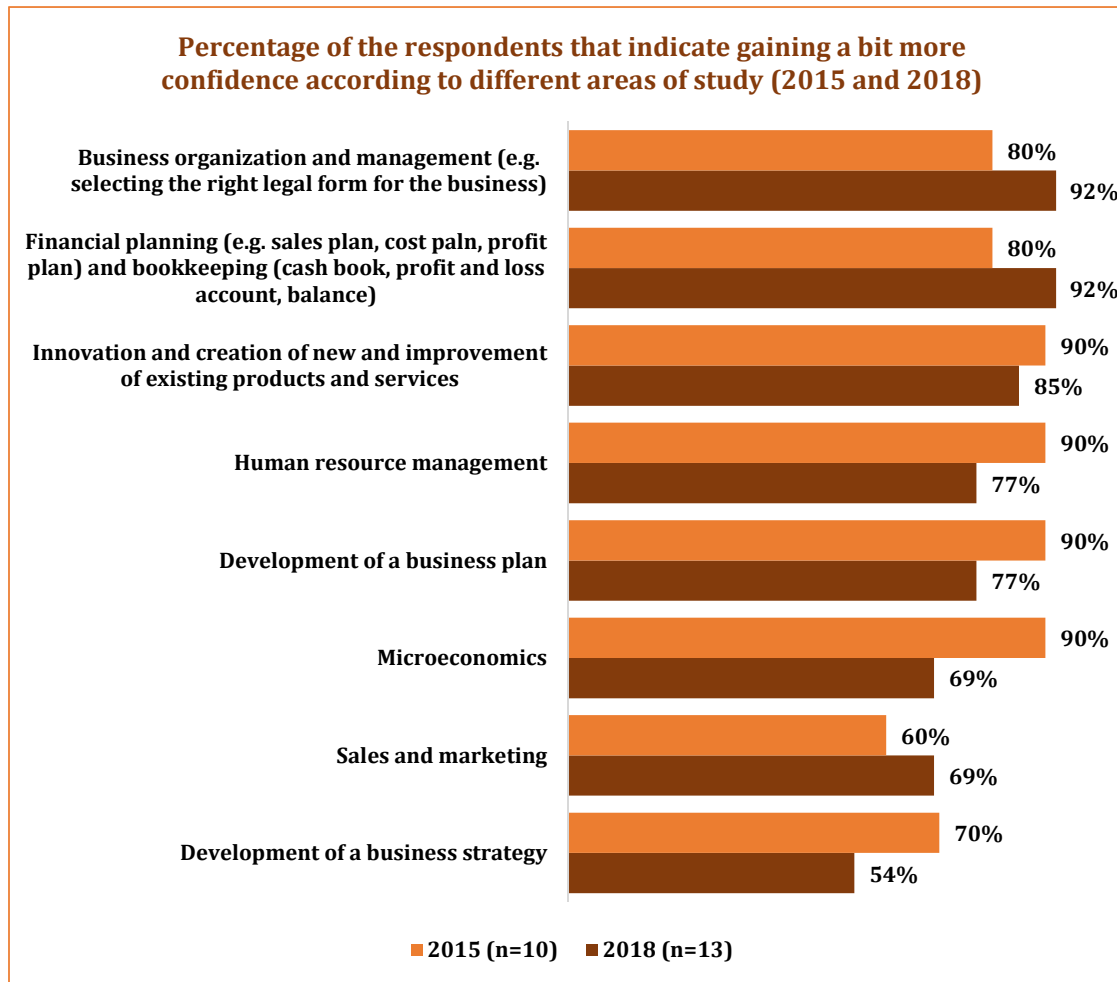
Self-employment

Nearly one-third 32% (13 in total) of the respondents had their own business during the program. More than three quarters 77% said that their businesses had improved after participation in YE4M program. Of those who said their businesses have improved, 80% of them reported that the reason was increased customers while over two-thirds 70% reported their businesses became more profitable and their sales had increased. Half of them said they had employed more people. 30%

were selling new products or offering new services as well as felt that they had become better at drawing basis plan for business. Only a very few said they had improved in financial management.

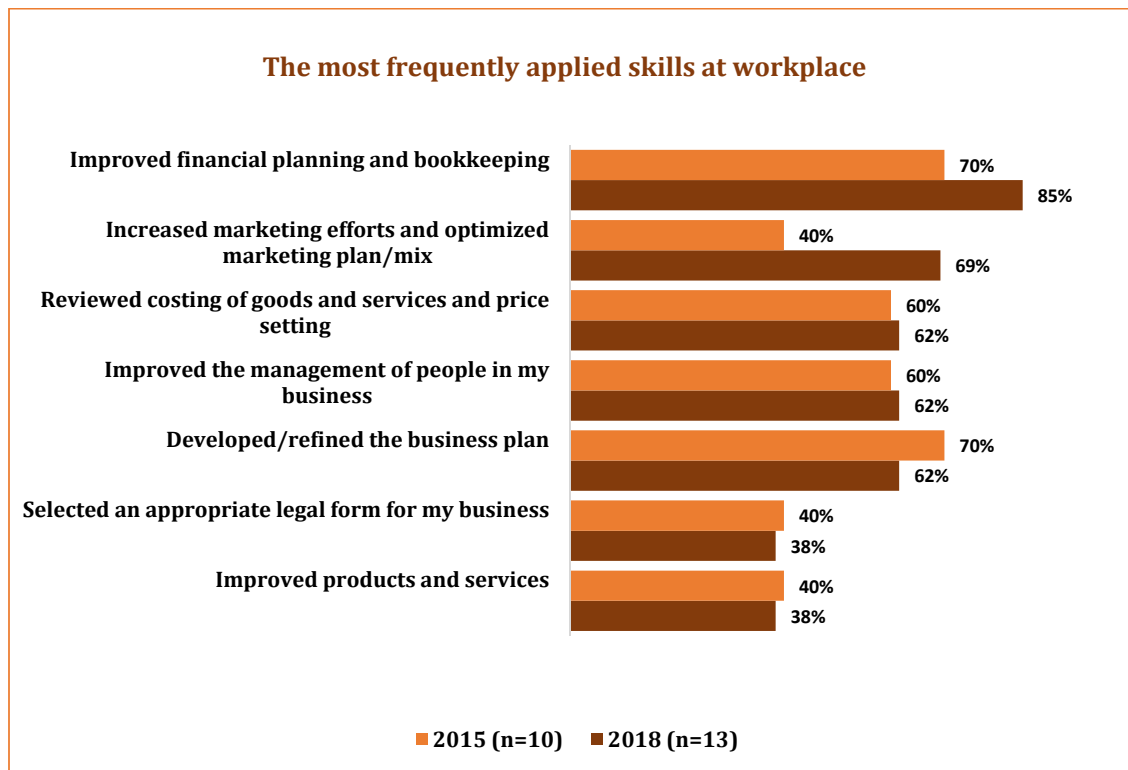
Skills Improvement

Figure 29: Gaining more confidence



In 2018, graduates are highly confident in 1) business organization and management 2) financial management, and 3) innovation and creation while they are least confident in 1) microeconomics, 2) sales and marketing, and 3) development of a business strategy. Nearly half 46% of the respondents feel there is no special change regarding development of a business strategy.

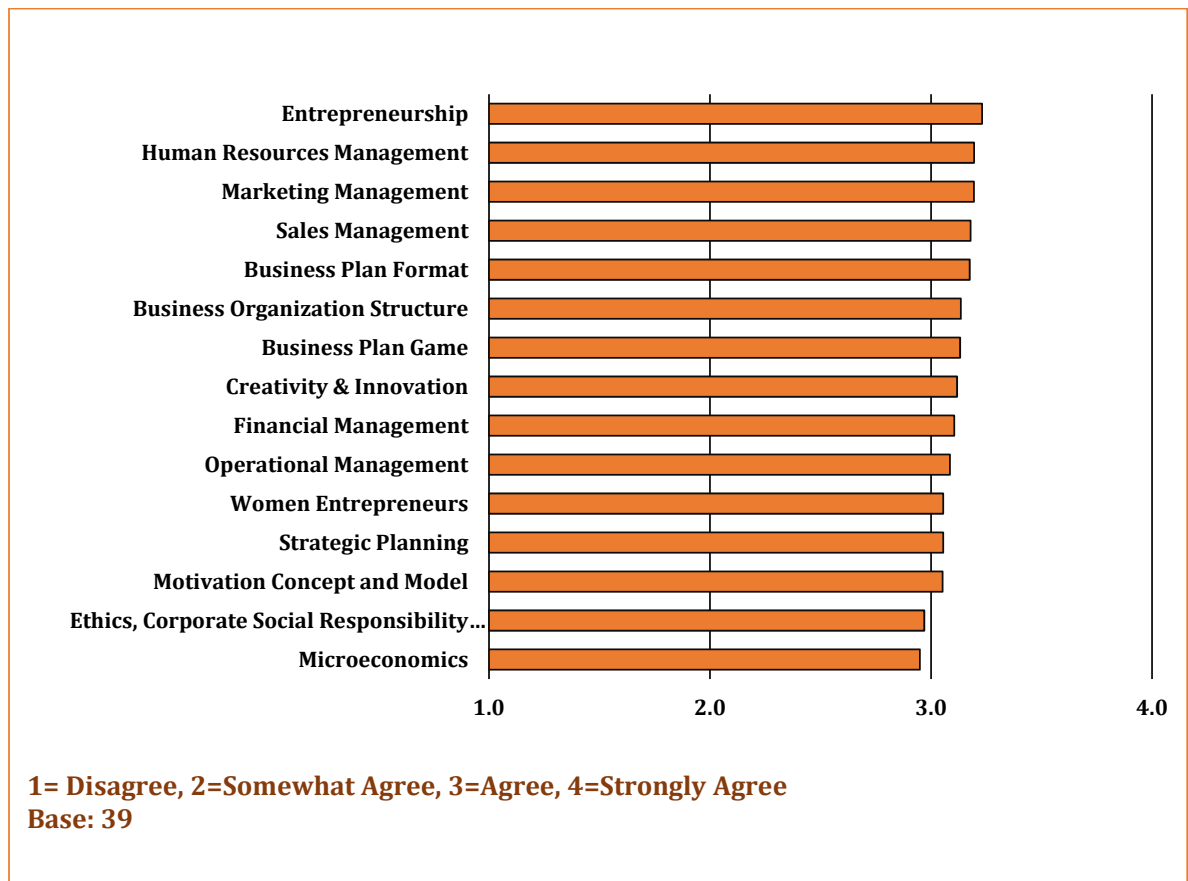
Figure 30: The most frequently applied skills at workplace



As shown above, 85% said improving financial planning and bookkeeping is the most applied skill. This topped other frequently applied skills such as increasing marketing efforts and optimized marketing plan/mix (69%), reviewing costing of goods and services and price setting (62%), improving the management of people in business (62%), and developing/refining the business plan (62%). The least applied skills include 1) Selecting an appropriate legal form for business and 2) Improving products and services.

Skills Learned from the Course

Figure 31: Skills learned from the course



Index range – from one to four indicates respondents' level of agreement regarding areas of study they learned during the program. Understanding 1 as "Disagree" and 4 as "Strongly Agree", the chart indicates respondents generally "agree" that they learned the mentioned topics.

The respondents beyond agree that they learned "entrepreneurship" during the program. This is followed by "human resource management" and "marketing management." Regarding learning ethics, corporate social responsibility and green entrepreneurs as well as microeconomics, the respondents lean toward "agree," but not completely.

No Business during the Course

More than half (53%) of the respondents (22 in total) did not have their own business during the program. Among them, 45% of the graduates “agree” and 50% “strongly agree” to start a business given that they have the opportunity and resources. Only one (5%) of them is not sure about whether to start a business or not.

When it comes to knowing practical details to start a business, three-quarters (73%) “agree” that they have necessary knowledge whereas 18% “strongly agree” on the matter. Only 9% of them are undecided on it.

Indeed, the results enable one to convey that 86% “agree” or “strongly agree” when asked if they think they would have a high probability of succeeding providing that they start a business. 9% have nothing to comment while only one respondent (5%) feels he does not have high probability of succeeding.

Activities toward starting a new business

Table 4: Percentage of Respondents taking further actions towards starting a new business

No.	Actions/Plans	Number	Completed %	Initiated %	Total
1.	Conducted market research	27	27%	39%	66%
2.	Prepared a business plan	32	39%	39%	78%
3.	Looked for a business location	29	37%	34%	71%
4.	Acquired necessary business equipment (e.g. tools, furniture)	22	29%	24%	54%
5.	Invested time to develop product/service	27	22%	44%	66%
6.	Organized finance to start the business	31	34%	41%	76%
7.	Applied for required business licenses, permits or arranged for any necessary formalities	25	24%	37%	61%

Table 4 clearly shows that about 30-40% have considered doing something to start their own businesses in the future while 30% on average have completed certain necessary actions, be it a business plan or market research to start a business. Compared with 2015, there is a significant increase in graduates taking further actions to start own businesses in the future. In 2015, more than half of the YE4M graduates did not do anything toward starting a business. However, in 2018, 33% on average have not done anything. The figure represents about 15-25% decrease.

30-40% have considered doing something to start own business

30% on average have completed certain necessary

New Companies

One in seven graduates (15%) started a business after the program whereas none of the graduates extended their business in addition to the existing one after graduation.

Interest Level on Additional Training

<p>One in Seven graduates want to attend additional/new training from YE4M</p>	<p>One in seven graduates (6 in total) are interested to attend additional/new training programs from YE4M. Interested study areas range from digital marketing,</p>	<p>46% (19 in total) would like to attend the program on weekends – both Saturdays and Sundays</p>
---	--	---

financial management, human resources development & organization structure, project management, and strategic management & leadership skill, to strategic marketing management.

When asked to indicate preferred training period, nearly half 46% of total respondents (19 in total) said they would like to attend on weekends – both Saturdays and Sundays. This topped other options such as two days in week day, one day in weekend, one day in weekday, three days in weekday, and 8 random days in a month.

Expected timeline to start a new business

When it comes to not starting a business, from those who do not have any business, (46%) have intention to start a business within 3 years. Following are respondents with intention to start a business within the next year (32%), and ones with intention to start within the next 6 months (14%), and finally, those who still have no idea (9%).

Main reasons for not starting a business

Table 5: Reasons for not starting a Business

No.	Reasons	Number	Percentage
1.	Lack of finance	13	59%
2.	Cannot quit the current job yet	2	9%
3.	Lack of confidence in technical skills	1	5%
4.	Lack of confidence in entrepreneurial skills	1	5%
5.	Problems to obtain required permissions from authorities	1	5%
6.	Cannot find partner yet	1	5%
7.	Did not find a suitable business location	1	5%
8.	Do not have permission from family	1	5%
9.	Still in process of preparing	1	5%
	Total	22	

The research finds that majority of the graduates are saving up money to start a business. Lack of finance topped the list regarding reasons for not starting a business with 59%. Other issues include inability to quit the current job, lack of confidence in technical and entrepreneurial skills, lack of business partner, and lack of permission from authorities as well as family.

Revenue and Profit of those with Businesses during the Program

Figure 32: Revenue of YE4M (Kyat)

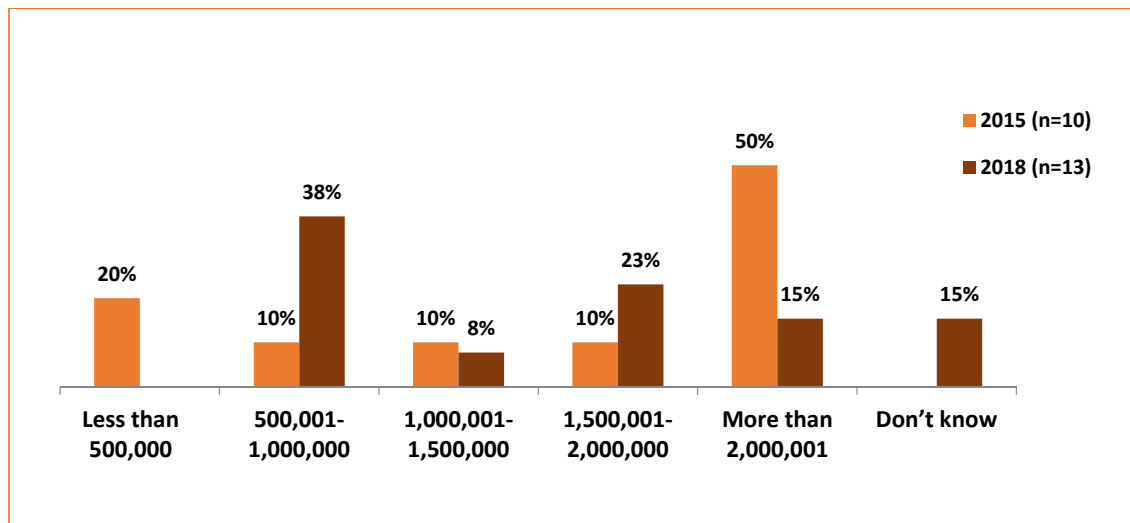
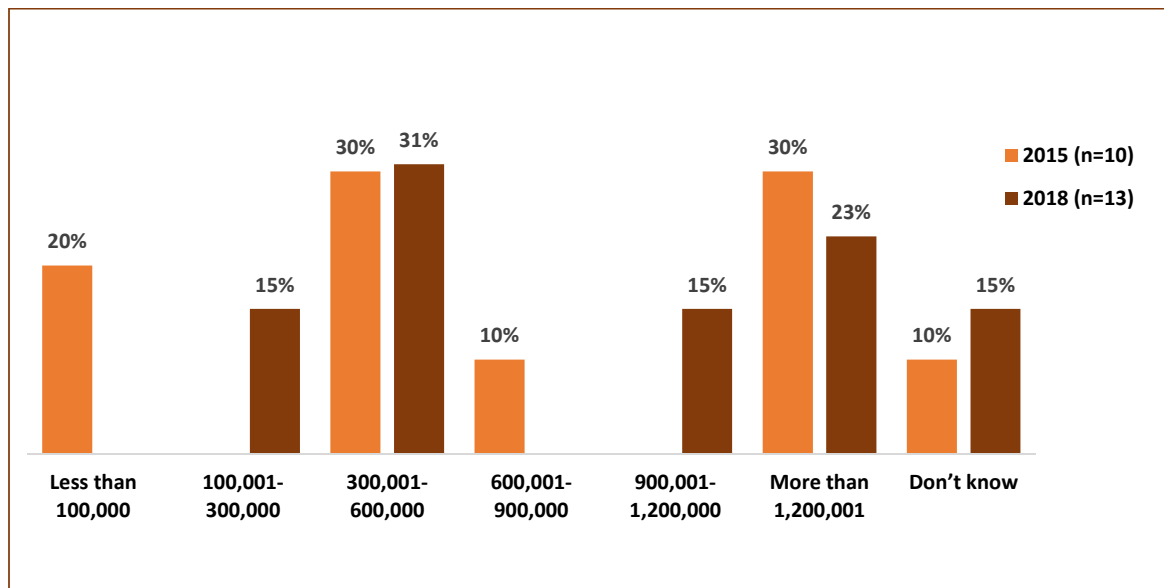


Figure 33: Profit of their business (Kyat)



According to 2018 survey, (61%) of graduates with businesses during the program made monthly revenue of between 0.5Million and 2Million kyats. Compared with 2015, fewer respondents had more than 2Million kyats in revenue per month. However, in 2018, none of them received revenue of less than 500,000 per month. In 2018, 31% of the graduates with businesses during the program made monthly profit of between 300,000 and 600,000 kyats. Compared with 2015, lesser number of respondents received more than 1.2Million kyats as profit per month. However, in 2018, none of them received profit of less than 100,000 kyats per month.

Here, notably, majority of young entrepreneurs are weak in financial accounting and rarely did bookkeeping, and expressed estimates of revenue and profit. In addition, one to bear in mind is that overall, business performance in 2018 is declining.

In the case of those who started a business after the program, two of them earned more than 2Million Kyats, with three remain unaware of how much their revenue is. This shows entrepreneurs are still weak in financial management and that there is room for improvement here. The number of entrepreneurs has increased from 2 in to 6 – which is an increase of about 67%.

Similarly for profit of those who started a business after the program, in 2018, a greater percentage 67% are not aware of how much they are making as profit per month. This exhibits much needed skills for financial management. While 100% (2 in total) made between 100,000 – 300,000 Kyats in 2015, none of the respondents of 2018 was observed in this range.

5. In-Company Trainer - Decision Maker

5.1 Training Feedback

Up until now, 16 companies have sent 39 trainers to courses conducted by CVT.

Feedback by Decision Maker on CVT Training

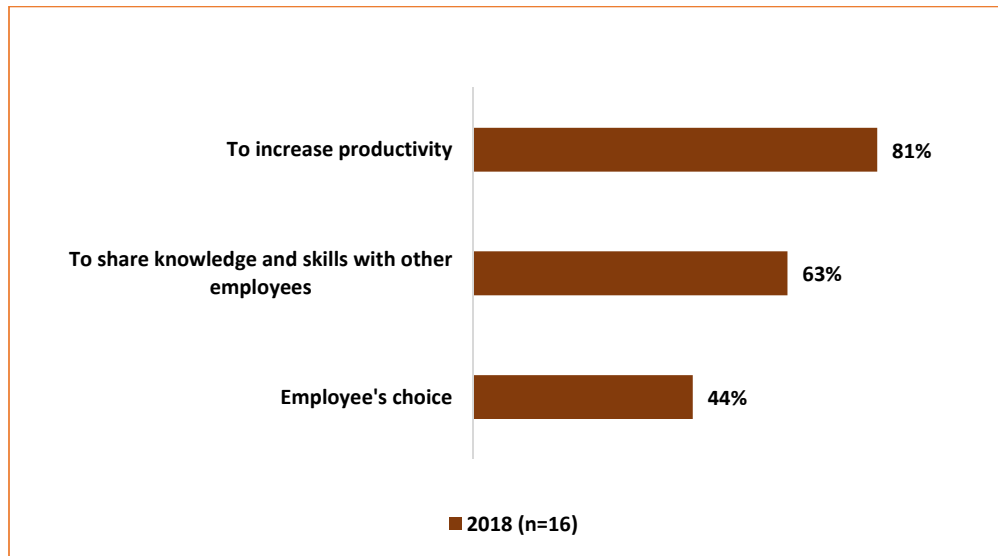
Reasons for sending Employees to CVT

With 81%, the majority of companies reported they sent their employees to increase their productivity at work. Another 63% said that they expect their employees to be able to share knowledge and skills they have learned to others at workplace. Furthermore, additional 44% said it was their employees' choice to go and attend the training.

**Respondents:
16 companies**

11 - Services
3 - Trading
2 - Production

Figure 34: Reasons for sending employees to CVT



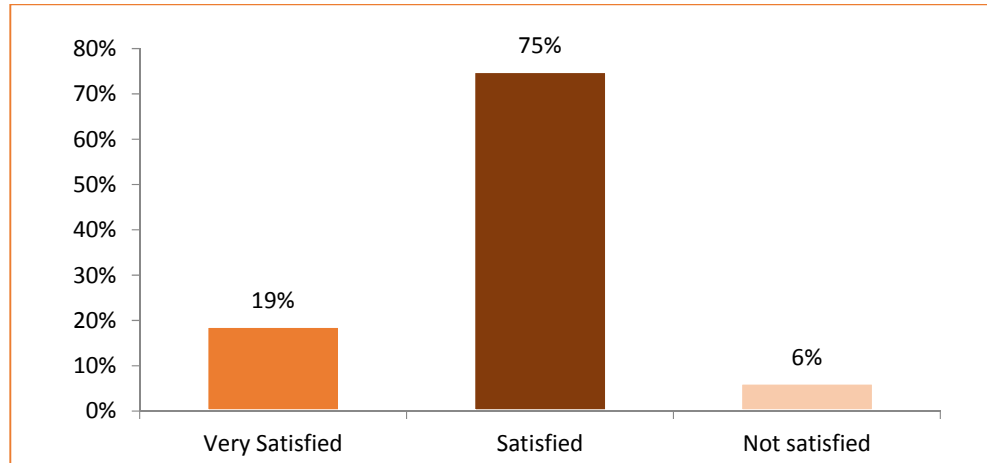
Difficulty in Sending Employees

When asked whether they faced any difficulties in selecting which employees to send or not, none of them had any.

5.2 Impact of the CVT training

Training Efficiency

Figure 35: Satisfaction with Trainers after CVT (2018)



The majority of companies 75% are satisfied with trainer in terms of efficiency and productivity, with 19% very satisfied. 6% of them (one out of 16) has negative feedback.

Reasons for Satisfaction

Almost all of the companies 94% are positive concerning efficiency and productivity of their employees after completion of the program. The fact that employees have become better at teamwork is considered the major reason with 33%. Some 22% of companies witness that their employees have come to understand better about what kind of training they should conduct to different ranks at their companies. Another 13% clearly noticed improvement in working style – they have now adapted to systematic working style and become natural doing it. Some other reasons consist of 1) increased self-confidence 2) improvement in presentation skills 3) ability to share what they have learned to others at the company 4) ability to facilitate a successful training to new employees 5) improvement in problem solving skills 6) increased knowledge. In contrast, the survey finds one company, which is not satisfied because the employee who has finished the program rarely conducts training or shares knowledge to others internally at the company.

Major Reasons for Satisfaction with Efficiency and Productivity

Better Teamwork	33%
Better Training	22%
Better Working Style	13%

Major Reasons for Meeting Expectations

Improved Information Sharing	40%
Increased Productivity	20%
Enhanced Skills	13%

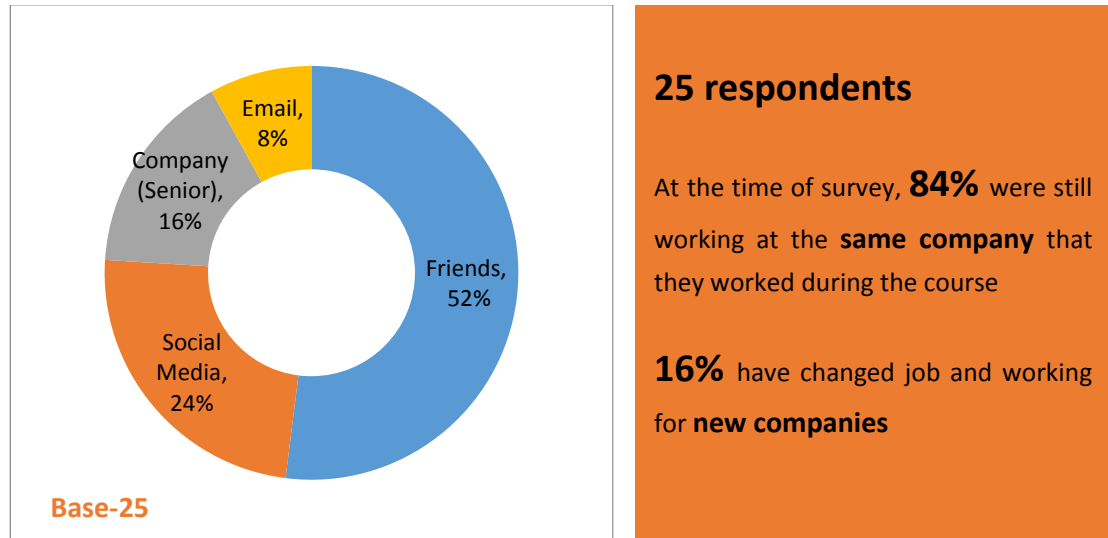
Meeting Expectations

Regarding the extent to which the employees meet companies' expectations, 94% feel trainers have performed better than before noticeably, with 6% complaining that the program does not make any difference. For 40% of the companies, the fact that trainers have become knowledgeable, better prepared, and well equipped with necessary skills is the most important reason. They highlighted that trainers have really improved in expressing themselves and sharing ideas and knowledge to other staffs. Some 20% of the companies indicated that there was visible increase in productivity, whereas 13% reported trainers had gained many more skills. Among the companies surveyed, one thinks trainers have acquired leadership and management skills that can help them and staffs to become better team players and establish collaborative working environment. However, one major concern for not meeting expectation is related with internal problem – time constraint – employees rarely have time to provide training at the company, which makes sending them to CVT unproductive.

6. In-Company Trainer- Participants

6.1 Training Feedback

Figure 36: Percentage of Participants saying how they obtained information about CVT



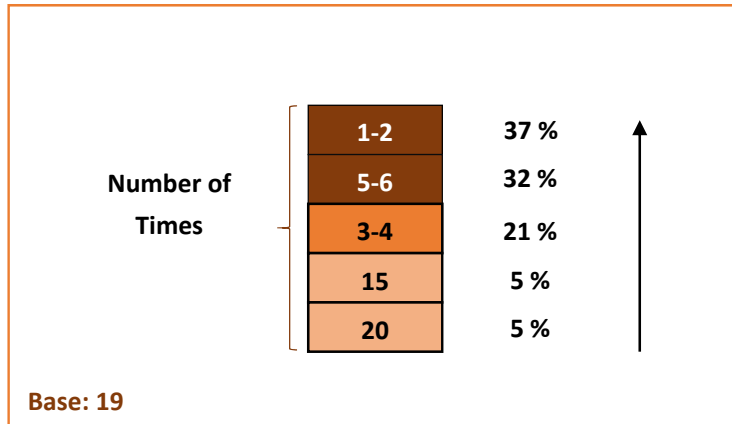
Indeed, more people said that they knew CVT from their friends/colleagues (52%), followed by social media, especially, Facebook (24%), from their respective companies, particularly managers or CEOs/in-charge (16%), and CVT newsletter and emails sent to them (8%).

Reason for attending CVT course

Overall, 48% of trainers said they decided to attend CVT trainer course with the aim to become a well-performed trainer to train staff at work and that to share what they learned with team. Another 12% joined to learn teaching methods, while their senior managers recommended additional 12%. Some other reasons include – 1) to work as a trainer 2) to improve presentations skills and interaction with people – involve in group discussions and teamwork 3) think highly of CVT and its reputation 4) to promote the image of the current company by improving staff performance 4) to build a team with strong communication skills.

At the time of doing the survey, out of 25 respondents, 19 (76%) had already shared their knowledge and skills they learned from the course at work, while all 76% of them believe training content is applicable. Meanwhile, 17 of them (68%) have already been positioned as in-charge of in-company training at their companies. When asked if they support CVT apprentices or not, 68% said they no longer supported while 32% still did.

Figure 37: Number of times respondents have shared their knowledge at work after the course



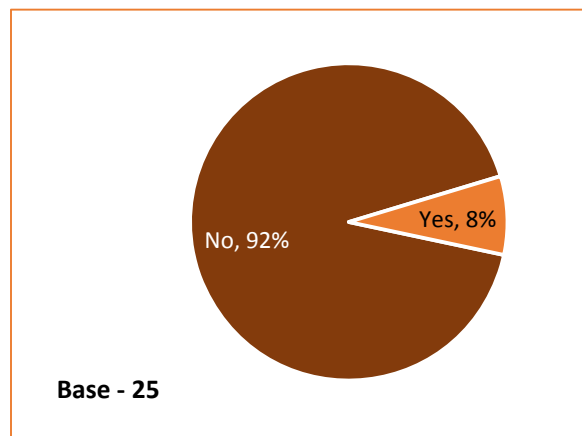
The share of respondents of which the respondents shared one to two times make up 37%, closely followed by five to six times (32%), three to four times (21%), and 5% each for 15 and 20 times.

From the remaining who has never shared with others after in-company trainer program, half of them (3 in total) are busy with other stuff, particularly because they are now in a senior position. Two responded that what they learned are not related to work, while one said he was more of a senior and older than most staff.

6.2 Impact of the CVT training

Understanding the Lecture

Figure 38: Difficulty in understanding of the lecture



When asked if they have any difficulty in understanding the lecture, majority (92%) had no difficulty while 8% (2 in total) said English language is slowing their learning process. They suggested that even in Myanmar documents, some terms remain in English. Regarding this, they believe such terms should be translated into Myanmar and handouts should be completely in Myanmar language.

Teaching Methods

All of the respondents (100%) believe that teaching method at CVT is complete satisfactory – rated as “High”. Majority of the respondents consider TCT as important. At the top of the reason list is it being an effective dual track system – majority think having to do both theory and practical works are of great help to apply at workplace. Significantly, they highlighted that it was an internationally recognized curriculum and that it is highly effective to deepen the understanding in a short time. Many respondents believe teaching environment makes a difference in the extent to which a student absorbs. For this reason, they highly value CVT’s student-centered teaching - group discussions, sharing ideas, activities, and workshops that encourages student participation. Respondents think training by CVT quite obviously helps them perform their jobs better. CVT has increased their basic understandings and creates favorable environment for them to interact easily with both teachers and fellow students. They now understand the importance of communication and well-structured public speaking; they like that CVT allows them to share and express ideas freely in the class; they realize theory studies alone is not enough and that feel CVT has a balanced teaching style with both theory and practical works; they appreciate teachers welcome questions and are enthusiastic to provide helpful insights on both personal issues and related studies; learning leadership and management helps to increase staff’s efficiency as well as theirs.

Curricula

Respondents expressed high level of satisfaction for curricula with 100% rated it as “High.” Respondents credit CVT curricula with 28% saying it is obviously quite good – they themselves have experienced noticeable development in their performance. To explain, the curricula being an international standard one and that it fits their business needs are observed as major reasons. In combination, these three reasons are estimated to contribute 56% of why respondents think the curricula is satisfactory. Respondents think the curricula are concise and to the point as well as delivery of the lessons help students to become independent and improve critical thinking. Learning lesson planning and delivery of the lessons help them understand how to engage trainees effectively as well as how to behave as a professional trainer. The curricula being supportive for their career progress and personal development are important secondary satisfactions. Other reasons include 1) effective bilingual system 2) teaching on labor law and regulations 3) regular discussions among trainees 4) applicable skills 5) useful safety subjects in particular 6) evaluation is based on grades 7) group discussions 8) improved communication and leadership skills.

Handouts/text

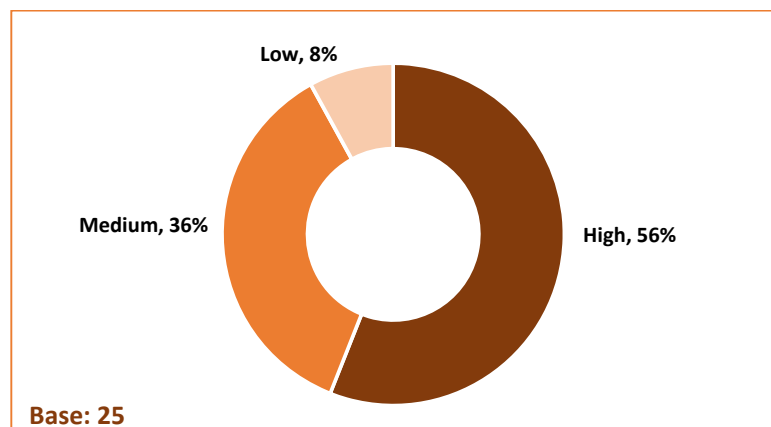
The survey finds that the respondents view handouts and textbooks provided as highly satisfactory with 88%, whereas some 12% rather suggest it as medium satisfactory. Among those with high satisfaction, tellingly, a third (36%) highlighted the handouts are well prepared and complete. The handouts and presentation slides remain useful after the program and are kept as reference, for example, details on labor law, and this was considered as important secondary satisfaction factor

with 27%. A few from this group also mentioned that they can conveniently refer back to handouts or recall anything from them for exams, while a few others said the flow and delivery were easy to follow with 14%. Additional 18% recognized providing handouts and projectors creates an interactive teaching environment – some said as CVT provided everything, they did not need to bring anything, which made teaching style consistent and ensures every student receives fairly. One student particularly reported teachers are knowledgeable, responsive, and caring – they never hesitate to answer general questions not associated with studies; they share general knowledge apart from what is included in handouts or textbook even without asking.

On the other hand, the survey finds three respondents who are less optimistic about handouts and textbook. Their concerns include a need of even more general knowledge, English language being a barrier in complete understanding, whereas one ticked “medium” for the effectiveness of teachers’ sharing in the class.

Teaching Environment

Figure 39: Satisfaction with the classroom and teaching equipment



The figure represents that 56% are highly satisfied with the classroom and teaching equipment, 35% are rather medium satisfied, with 8% having low satisfaction.

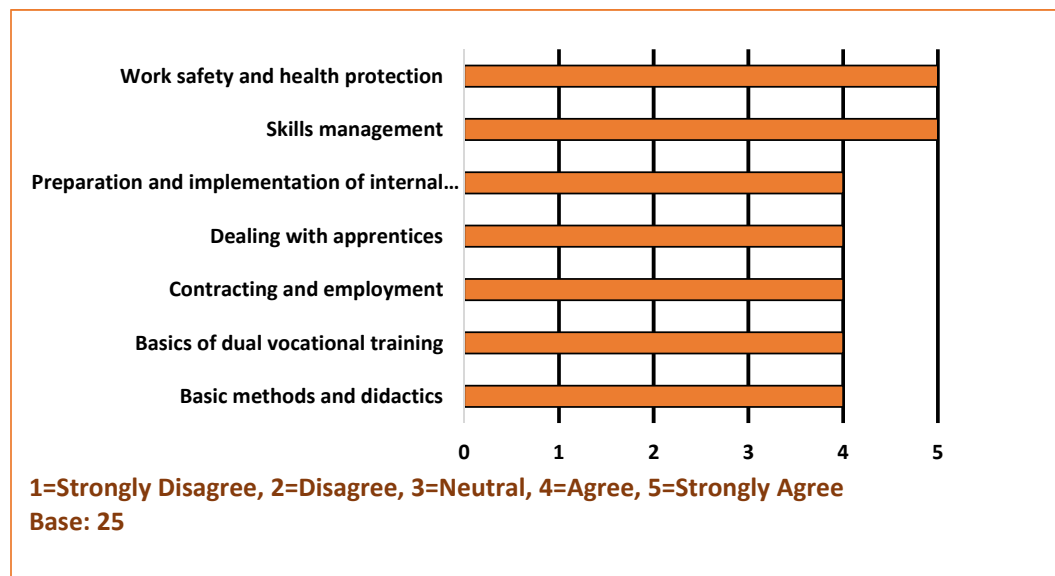
56% of respondents see they are positively affected by the teaching environment – classroom and teaching equipment. Half of the respondents particularly mentioned the location is nice as well as fair temperature is set in the class; the location creates a pleasant and supportive atmosphere. Another 43% think the environment is quiet enough for them to concentrate and receive what is taught at maximum level. Additional 14% see the rooms as quite big – the class is not large; the room promotes better engagement and encourages class participation. This is further supported with the feeling that the class size matches the training room size with 7%. Other reasons include 1) having projector and chairs for each student 2) having regular eating time 3) running air-conditioner throughout the course.

36% of respondents are somewhat satisfied with the classroom and teaching environment. Tellingly, a third (33%) stated no more than 10 students should be placed in the classroom as the room cannot hold more than that. The remaining provided some different reasons – 1) the room is close to the road outside – the noise of vehicles and others come into the room 2) a more organized classroom with better arrangement of tools, aids and furniture – the trainers should encourage everyone to help put things away after the class 3) the elevator does not work from time to time, and when there was an urgent need to use stairs, they did not like that for the stairs area is narrow 4) temperature should be balanced with outside – not too cold or too hot - sometimes it is freezing in the room 5) small room 6) the room is frequently changed.

8% of them (2 in total) with low satisfaction highlighted noisy atmosphere and dark as well as narrow staircase as major concerns.

Quality and Effectiveness

Figure 40: Rating according to effectiveness of subjects or usefulness in workplace



Index range – from one to four indicates respondents’ level of agreement regarding the effectiveness of subjects or usefulness in workplace. Understanding 1 as “Strongly Disagree” and 5 as “Strongly Agree”, in general, “Work safety and health protection” as well as “Skills management” subjects earned “strongly agree” statement regarding their effectiveness or usefulness, with the remaining subjects earning “agree” statement on the matter.

7. CVT Certified Instructor

7.1 Training Feedback

Opinion on 2-week Didactic Course

When it comes to 2-week didactic course, 83% reported they had no problem learning, with 17% having had some difficulties to understand lessons completely and that some lessons are high-level for them, possibly in response to curriculums in English language. Specifically, one instructor said that English language was difficult to understand and hence, suggested separate English language training course should be provided once a week.

Opinion on 6-week Subject-specific Professional Course

In the case of 6-week subject-specific professional course, 88% reported that they were doing fine with the current curriculum and that they understood completely. Meanwhile, one complained that it was quite difficult before knowing the lesson plan. Another one who attended wood processing course said he learned a great deal about wood/timber and other systems whereas one instructor from H&G course thinks hotel subjects are very helpful for him to apply at workplace.

Other common suggestions include – 1) hire more teachers 2) improve commercial assistant course and computer training 3) deliver additional lessons on engine related topics 3) deliver additional lessons on in-depth operation procedures of CNC system utilized machines 4) update the curriculum to the latest one available.

Opinion on 4-week Evaluation on a Workplace

When questioned about their opinions on 4-week evaluation on a workplace, two-thirds 67% feel that the duration is enough for them and evaluation works are helpful to assess their proficiency level. However, from the remaining, there are some issues observed – 1) two instructors feel they should do more practical works; 2) study rooms are small and machines and tools for practical works are too old to be used and that they should be replaced with new ones; 3) 45 minutes is not sufficient; 4) evaluation period should be more than four weeks. In addition, regarding practical lessons, apart from welding, CVT should include operating/handling other machines and equipment.

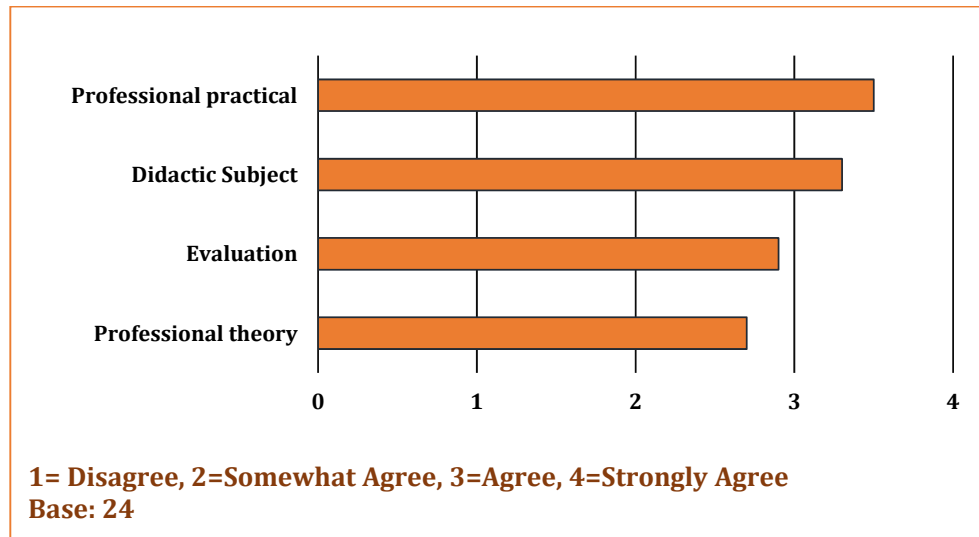
Other common suggestions are observed – 1) acquire more CNC machines and teachers to teach basics of machines 2) increase duration of theory classes 3) teach how to use/operate other machines in addition to welding machine 4) conduct on-the-job trainings at different hotels as operation procedures are different from one hotel to another 5) replace old tools with new ones.

24 Respondents

7 – Metal Worker
6 – H&G Food and Beverage
3 – Electrician
3 – H&G Housekeeping
2 – Wood Processing
2 – H&G Food Preparation
1 – Hotel Front Office

Interest Level on Topic

Figure 41: Interest Level on Topics



Index range – from one to four indicates respondents’ level of agreement regarding their favorite level on topics they learned during the program. Understanding 1 as “Disagree” and 4 as “Strongly Agree”, in general, “Professional Practical” is recognized as their favorite topic, followed by Didactic, Evaluation and Professional Theory.

Reasons for interest in didactic subjects

Much of the high interest level in didactic subjects from some 38% of the instructors is rooted in the fact that the subject is related to work as well as good curriculum and teaching styles allow one to understand and memorize easily. Effectiveness of trainer training followed closely behind with 31% reporting that they clearly guide how to teach as an instructor – sharing and lesson plans. An additional 6% say the subjects are helpful to improve introduction part for beginners, with 13% suggesting that more training days should be provided for didactic subjects.

Reasons for interest in 6-week subject-specific professional course

Regarding professional theory topics, almost all of them provide positive feedback – they believe the subject is related to work and teaching methods/styles are clear and easy to follow. There is also interest in drawing course as well as training plan and lesson plan. Two out of 9 would like to have more time for theory classes.

Regarding professional practical topics, vast majority of the instructors (16/18) have positive feedback relating to teaching system and activities. 50% of them are satisfied with practical works required to do during the course. 17% of them mention that practical courses relating kitchen and fire safety are useful to deepen the understanding. Particularly, 12% of them liked about the fact that they have gained hands-on experience with machines and equipment as full set of equipment

are provided. Some feel teaching system is a major advantage towards contribution of effective learning environment. There are also high interest in activities such as role-play, experience sharing sessions and group discussions. However, a few recommend that the current duration is not enough and that should be increased to 5 months.

Reasons for interest in 4-week evaluation at workplace

Generally, all of the instructors answered (8 in total) are satisfied with 4-week evaluation at workplace. Reasons include 1) effective evaluation 2) having to lead a project – one topic is given and a project is assigned to individuals 3) frequent team activities and strong teamwork 4) real work experience. A few suggest that they would like to have hands-on experience with other machines in addition to welding machines.

Feedback on Teaching Methods and Curricula

When questioned about their opinions on teaching methods at CVT, majority of instructors recognized the effectiveness of the dual track system – both practical and theory classes, the whole student-centered teaching system – curriculum, teachers, teaching methods, presentations, teaching aids, and reputation of the CVT in the market.

More than three-quarters 79% reported that systematic teaching system allows one to communicate complex information clearly. They think teachers at CVT are patient and attentive. Teachers at CVT ensure to deliver quality instructors to perform as a real teacher upon course completion. In addition, most instructors feel that CVT serves as a platform to connect education and employment. Few also mentioned the fact that CVT is a recognized school in foreign countries and that international standard curriculum is adopted. As well, they like that CVT informs the employer if a trainee is absent, in addition to doing analysis on students.

In contrast, some recommend CVT to update its curriculum to the latest one available. As well, some think there are a lot of room for improvement here – 1) prioritize on English language training 2) allocate more time to teach presentation skills of instructors 3) provide enough teaching aids 4) ensure commercial studies for EL course is clear and easy enough 4) improve teaching on mathematics – measurement, quotation, calculation of materials, time and labor, overheads.

Feedback on Handouts

Generally, instructors believe CVT provides full set of equipment and handouts are well prepared and simple enough to understand. However, some think English language is making learning difficult, as most of the handouts are prepared in English. One said Myanmar translation provided for chapter-by-chapter was very helpful for students. A few said it was difficult to digest what the handout says in a short time possibly in response to English language.

Feedback on Classrooms, Facilities for Practice and Teaching Environment of CVT

Three-quarters 75% of instructors are satisfied with the classrooms, facilities and teaching environment. Particularly, they appreciate about having projector in every class as well as good maintenance services. As well, they believe there are enough teaching aids such as equipment for practical classes.

7.2 Impact of the CVT training

Feedback on efficiency of the course

When it comes to whether the course is efficient or not, two-thirds 67% reported all theory lessons were applied at workplace and upon course completion, they had become more confident to work as an instructor. They agree that they have learned how to teach effectively and prepare lesson plan. In addition, they think necessary knowledge were delivered within a short time. A few others think they have become better at communication and teamwork, which is a necessary skill to enhance team spirit. A few said they had improved in sharing which helps a great deal in teaching to other staff. To conclude, generally, instructors agree trainers effectively and completely conduct the training in a short time.

Out of 24 instructors interviewed, 21% (5 in total) of them provided trainings at other places. The rest 79% have not done any teaching at other places apart from workplace.

Job Market

Among 24 respondents interviewed, 5 of them provided some training in Yangon, Shan State and Rakhine State. The rest 19 (79%) have not done such activity yet.

Challenges in Giving Lectures

Five instructors provided training to others in **Yangon, Shan State and Rakhine State**

79% do not conduct any training at other places apart from workplace

In general, certified instructors do not have any difficulties toward providing lecture at other places upon completion of the course. One in six instructors experience some challenges which are concerned with difficulty to teach underqualified students, English language usage, and difficulty to travel while working at the same time.

Field of Employment

Table 6: Employment after CVT Certified Instructor Course

No.	Course Attended	Number	Current Occupation
1.	Metalworker	7	Fitter, Industrial Expert, Machine Operator, Owner, Repair Ship, Welding Construction
2.	Wood Processing	2	Interior Design, Technician
3.	Electrician	4	Bingo Engineering Group, Electrician,
4.	H & G Housekeeping	3	Assistant Manager, HR Manager, Supervisor
5.	H & G Food Preparation	2	Bakery trainer, Executive Chef
6.	H & G Food and Beverage	6	Assistant Manager, Executive Chef, Front Office Manager, Manager, Operation Manger, Supervisor
	Total	24	

The table shows that all of instructors are working in relevant industries in accordance with their course of study.

8. Multiplication Ability of CVT's Dual Education Programs

The relevance of the dual vocational training approach within the VET landscape of Myanmar

Overall, this report shines a definitive light on how the respondents are still positively affected by the dual track system of CVT. Based on the results, the respondents largely credit CVT's dual track system and its applicability at work. A vast majority are clearly seeing CVT as a way of improving Education to Employment journey and appreciate the recognition received at their respective workplace as well as enhanced productivity, along with the delivery of quality work by CVT graduates.

The survey finds major weaknesses of CVT as follows:

- CVT Vocational Education Training courses are not known by the youth across Myanmar as much as it should be
- The duration of 3 years is viewed as too long by both companies and apprentices
- The course just provides a certificate upon completion
- CVT should introduce short term courses that fit business need
- CVT should create a path that continues after the course, preferably up to degree
- High turnover rate after CVT (Employees quit midway the course or upon completion)
- Registration fee and program fee have become a burden for both companies and apprentices
- The practical training time is not sufficient
- CVT's curricula need improvement (Please refer to 9.1 Findings and Recommendations from Training Company – Employer)

Regarding the above weaknesses, MMRD would like to recommend the following points to remedy the situation, and for CVT to better position itself in the market.

Increase duration of Practical Class

This year survey shows the parties involved remain supportive about the CVT training content (both theoretical and practical components) and even demanding an increased duration for practical class. Evidently, respondents appear to appreciate the hands-on experience they gained that assisted in nurturing themselves to become professionals.

Negotiate with Enterprises to design courses that are highly effective, affordable, and short

Compared to 2015, the percentage of employers who have willingness for financial contribution as well as plan to send more employees have shrunk. Many partner companies are questioning whether spending on registration fee and program fee are really a good investment or not. They are less satisfied with the outcome, particularly, high turnover rate they suffer. They clearly view the duration of the program – three years – is quite too long. Accordingly, those less than satisfied with aforementioned facts are increasingly attracted to other shorter programs and training centres apart from CVT.

Establish brief courses with updated curricula for affordable and accessible education

Both CVT graduates and companies are requesting shorter vocational programs that enable the students to accelerate their learning at the same time consume less time and money. The program fee of \$100 is found to be expensive for daily wage workers. Meanwhile, more graduates are struggling because of their unsupportive employers. Employers and CVT are suggested to work closely to design a more culturally adapted curricula that fit business needs and improve employment readiness. In addition, they recommend CVT to provide NCSA certificate that is formally recognized in ASEAN countries instead of a mere Certificate of Professional Capacity.

Establish a path to continue education after CVT

Indeed, employers are comparing CVT with other training centers and complain about taking three years for a certificate. From the side of CVT graduates, some are eager to climb the career ladder by continuing their learning while some are not. This is heavily dependent on the level of intelligence and competence that is required at their workplace, along with the amount of experience the workplace is going to offer. More Commercial Assistant and Hotel & Gastronomy Programs graduates aim high and achieve more compared to the other program graduates. Accordingly, some of VET program graduates continued their learning by joining YE4M and CI programs. However, they are not necessarily essential. Here, the graduates are suggesting CVT to shorten the current three-year program as well as establish more brief courses that are going somewhere, preferably, up to degree level.

Raise Awareness and Expand in other Regions

Respondents highlighted a need for improvement in raising awareness of the program. Essentially, CVT should raise the role of media by inviting several media to events such as graduation ceremony and opening ceremony. Moreover, with the staggering popularity of social media, the respondents see it is important for CVT to keep the public updated via platforms such as Facebook. Emailing, putting ads in journals and newspapers are considered as second preferred options. CVT is highly recommended to keep in touch with the partner companies by sending newsletter, invitation, and schedule regularly to sustain the relationship with them. Mandalay Region is cited to be the most preferred region to open a branch as it is a commercial city and at an economically advantaged location, along with large youth population.

Introduce Additional Subjects

CVT is recommended to consider entry of competitors and increasing market seizing. In particular, in 2015, Singapore Myanmar Vocational Training Institute (SMVTI) was opened and has been producing 400 graduates per year. There are also a lot of interest in additional capacity building projects such as Car Service, English Language training, Construction Work training, Phone Repair Service, Computer training and Management subjects. CVT should consider linking with partner companies for job opportunities and serve as an official platform for E2E (Education to Employment) on regular basis.

9. Findings and Recommendations

9.1 Training Company – Employer

In general, employers are satisfied with the gained knowledge and applicable skills CVT graduates bring to the workplace. However, while employers agree that the capacity of their employees have visibly increased, more than half of them are rather unsure to send more employees in coming years, mainly because of slow business growth, long-term duration of the CVT program, and high turnover rate after the program. The business community as a whole is feeling less optimistic about the current economic climate in the country. This is backed by the finding that mere 15% have plans to expand their businesses. Employers do not feel this is the right time to invest their money in labor – many businesses have shrunk themselves in order to just continue running. Consequently, contracted workforce is not helping employers to meet the deadlines. Hence, the research finds that only a handful of large companies – with workforce above 100 people at least – are willing to send more employees to CVT.

a) To develop contractual agreement or a sort of guarantee to retain employees

Currently, employers do not have any contractual agreement with their employees to ensure they continue working after finishing the program. This is a common practice, but employers have changed their view as they continue to suffer from high turnover rate and are eager to find ways to retain them.

b) Negotiation with companies for registration fee and program fee

The research shows that about 60% of the employees chose to attend CVT programs by themselves, which means they paid for the program fee of \$100 and registration fee of \$100 that should be contributed by the company ideally. Majority of the employers request installment payment - nearly half of the companies prefer two times in a year – bi-annually, while three times in a year is the least preferred option by the employers.

Rarely, the employers fully sponsor their employees as opposed to 20% who do. 20% requested CVT partner companies to list them as their employees to meet the application criteria, but are not working for them which means they paid for the program fee of \$100 by themselves, whereas 20% were fully sponsored – registration fee and program fee completely covered – and sent by their bosses. From 40% of the employers who have paid registration fees, overall, these companies think collecting registration fees is appropriate.

c) Reconsider the application criteria (age and education)

Employers reported in some cases, regardless of their willingness and affordability to sponsor their employees, there were some barriers to CVT program such as age limit and education requirement. Regarding this, they would like CVT to take into consideration the eagerness and strong interest of

the students as well to be exempt from some criteria. Meanwhile, they also recognize it is highly dependent on the program, for example, for Electrician program and Commercial Assistant program, they would like CVT to maintain the current education requirement of at least matriculation exam level.

d) Increase the duration of practical class

The research finds that while employers think the duration for theory class is already enough, they firmly believe CVT should have a more balanced time allocation between theory and practical classes by increasing time for practical works, specifically, for Metal Worker Program and Electrician Program. Two days a week – one day for practical class and another one day for theory class is highly demanded by both employers and employees while there are a few others who suggest three days a week.

Reduce the program duration to one year

The employers are comparing CVT with other schools and training centers by highlighting that other schools even provide a diploma with six-months to one-year duration. The employers think given that three-years duration is to be continued, CVT should provide a degree rather than certificate. In addition, employers demand the recognition from the government in the CVT certificate.

e) Update the curriculum to the latest one available to fit business needs

Specifically, the employers mentioned that English skill is found to be the weakest among Cabinet Maker, Metal Worker and Electrician programs graduates. In this case, employers view CVT curriculum should be completely in Myanmar language and develop a more culturally adapted curriculum. In the case of Commercial Assistant program, teaching on accounting should be increased – above LCCI level I and II. Regarding Electrician program, teaching on national grid system as well as Computer Numerical Control system should be added, whereas in Hotel & Gastronomy program, air-ticketing course should be introduced. There are 13% who said theoretical and practical areas are missing from the CVT curriculum. Reasons behind this include – 1) to have modern machines 2) more time for practical works 3) enough teaching aids 4) decoration ideas and popular modern furniture items should be included in Cabinet Maker program 5) should teach how to handle hand tools 6) theory lessons should be taught more effectively – shorten some lessons to get to the point 7) TIG and MIT welding should be taught.

f) Open more branches in Mandalay Region, Magwe Region, Nay Pyi Taw and Ayeyarwaddy Region

When asked about expansion of CVT School in other regions and states, Mandalay Region is cited to have the largest demand, followed by Magwe Region, Ayeyarwaddy Region, and Nay Pyi Taw. (Annex-3: Figure 5). This represents that majority is foreseeing opportunities in upper parts of

Myanmar where there is a large youth population, increasing rate of school drop-outs, and high demand of skilled labor for value-added production in traditional businesses.

g) New Training Programs: Car services, English language, and Sales and Marketing

- Automobile Services
- English Language Class
- Sales and Marketing Training
- Construction Training
- Phone and Accessories Service
- Food Processing Training
- Computer Training
- Beauty Salon/Dress Making

9.2 Graduated Apprentices

a) Updated Curriculum and General Changes demanded in Five Programs

Electrician and Metal Worker programs: Introduce modern machines and equipment

EL and MW graduates are found to be much anticipating the updated curriculum. Electrician graduates think CVT should let them have hands-on experience with advanced technology machines and appliances that are in great demand in the market. Graduates want to gain finely tuned technological skills, namely, computer numerical control system for machines in contrast to manually controlled machines.

Metal Worker program graduates would like to have in-depth learning rather than basic grounding on subjects. Practical works are important for them more than spending time in theory class. They would also like to have enough tools to practice with and old tools replaced with new ones.

Commercial Assistant program: Introduce new softwares; Upgrade Accounting subjects level

CA graduates would like to improve their computer skills and learn more about new softwares applicable at work – CS, Photoshop. Accounting subjects are also suggested to be more than basic – above LCCI levels 1 and 2.

H&G program: Conduct practical works at different hotels

H&G graduates request to let them do practical works at different hotels as operation procedures of hotels are different from one to another. Curriculum for Food and Beverage subject is also suggested to be updated. Graduates think food preparation is as interesting as food decoration and they would like to gain much more knowledge regarding food decoration.

Cabinet Maker program: Introduce modern furniture making

CM graduates think it is important for CVT to teach them how to design and make popular modern furniture items in the market rather than teaching traditional furniture.

b) Reduce duration of the program to one year

Overall, one year is largely accepted to be an appropriate length of time for each program. More CM and H&G graduates would like one year among all five types of respondents. A clear majority cite 2 days a week, particularly on weekends – Saturdays and Sundays and 4 weeks per month is the most considered option.

c) Increase duration of practical class

Regarding practical works, the graduates are requesting to increase up to 20 days instead of 10 days. In addition, many respondents are demanding to do practical works at the same place.

9.3 Young Entrepreneurs for Myanmar

Overall, the research describes a picture of a graduate community that is largely positive, but also realizes some areas that can be improved -

- 1) Increase duration of practical class
- 2) Raise awareness of the program – establish own Facebook page and advertise via several media platforms
- 3) Level up to degree program
- 4) Include recognition from the government
- 5) Conduct networking meeting

9.4 In-company Trainer – Decision Makers

a) Revise courses

CVT should prioritize practical lessons and allocate more time on practical activities.

b) Improve Teachers/Teaching Environment

- 1) Train teachers according to standards practiced in Switzerland.
- 2) More space for growing class size
- 3) Properly built rooms – big, soundproof rooms

c) Collaboration and Raising Awareness

- 1) Link with the government schools
- 2) Organize job fairs

- 3) Hold discussions and talks about CVT
- 4) Collaborate with other companies

9.5 In-company Trainer – Participants

a) Update Curricula

- 1) Improvement in teaching related to safety course
- 2) Updating the curricula

b) Additional Subjects should be introduced

- 1) Administration
- 2) Environmental conservation subjects
- 3) Safety and Protection
- 4) HR subjects

c) Teaching Methods: Establish an interactive teaching system for better engagement

Here while the respondents recognize the student-centered teaching system at CVT, they are giving a slightly different view by stating a more interactive teaching environment. They expect the teachers to help creating a more engaging environment to test whether gained skills actually work or not. In addition, CVT should ensure teacher-student ratio to be no more than 1:10.

Handouts in Myanmar language

- 1) The need of complete Myanmar translation
- 2) The need of complete set of document for trainer program including soft copies of document

d) Improve Classroom and Teaching Environment

- 1) Bigger room
- 2) Soundproof room
- 3) Separate room for ICT
- 4) Wide staircase
- 5) Have own place to do practical works

e) Reduce training period

- 1) Allocate two days a week, preferably weekends
- 2) Shorten the course duration to one month

9.6 Certified Instructor

This year survey highlights instructor's positive feelings about CVT Certified Instructors program. Respondents are happy that CVT fills the gap that was once a barrier to become a professional trainer. Many respondents feel they have become confident, their capacity has improved and learned how to strengthen and maintain the social relationship. However, they believe CVT should raise awareness of the program as well as the importance of vocational education among those who are in need of such programs and opportunities but rather remain clueless about them. In addition, to have maximum level of concentration and productivity after the program, CVT should ensure to create an effective teaching environment that can largely affect how well a student receives. Respondents are also pointing out that there is a lot of room for improvement regarding the program itself, especially the curriculum, as follows.

a) Additional Subjects to be covered

- 1) Time Management
- 2) Sales and Marketing Management
- 3) Risk Management
- 4) HACCP course related to Hotel & Gastronomy
- 5) General Knowledge
- 6) Separate English Course
- 7) Engineering

b) Raising Awareness of CVT programs

- 1) To conduct seminars and events to share information
- 2) To promote via several media platforms
- 3) To work with the government – better if recognition by the government is included in certificates
- 4) To go to companies and explain about CVT courses to company staffs
- 5) To conduct related courses at schools of the blind and deaf in Myanmar
- 6) Apprentices to share news about CVT with others
- 7) To deliver awareness program on vocational education
- 8) To expand and get large space to place more trainees

c) Teaching Environment: Have bigger room and establish quiet learning environment

Particularly, instructors think it is important to have spacious rooms, especially for practical works, and quiet teaching environment. Few report that they expect the new school of CVT to get finished soon.

d) Improve Courses

- 1) To update the current curriculum to the latest one available
- 2) To increase duration of the course (5 months or 6 months)
- 3) To open programs in underdeveloped regions/rural areas
- 4) To have fixed schedule for the course
- 5) To teach both theory and practical lessons at one place
- 6) To provide more time for theory classes
- 7) To provide more CNC machines
- 8) To deliver workshop trainings

Annex-1 Economic Outlook in Myanmar

1. Economic Outlook in Myanmar

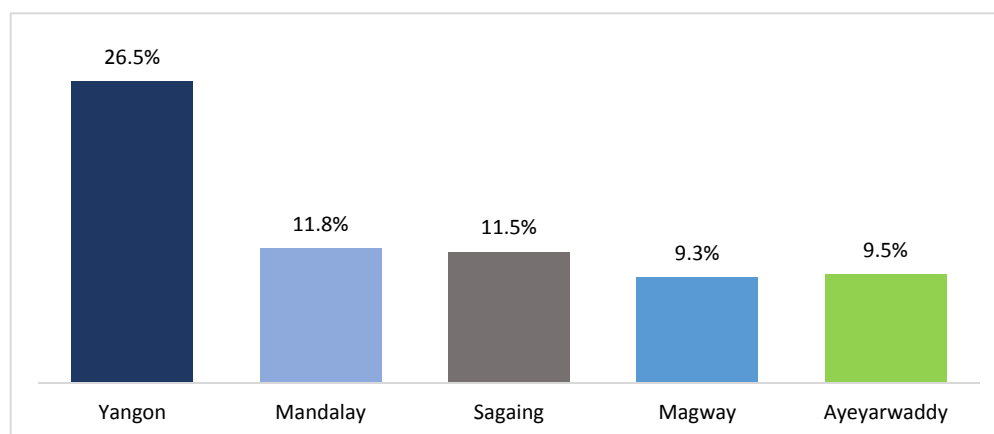
1) Demographic Facts

According to Department of Population, the total population of Myanmar was estimated at 53.39 Million people in 2017. Myanmar has a relatively large working age population of 33.8 Million people aged 15 to 64. 2014 census states that the country has 52% female population compared to 48% male population. As of 2017, the country's population remains largely rural – urban, rural ratio last measured at 30:70. The former capital, Yangon, has been known as the commercial capital of the country since 2008, when Nay Pyi Taw was officially proclaimed as Administrative capital of Myanmar. While Yangon is among the most populated regions in Myanmar with population of 7.4 million, it is the fastest growing city with vibrant opportunities. It has 29 industrial zones, more than 6,200 small-and-medium enterprises, and is the top contributor to the country's GDP.

2) GDP growth

According to Ministry of Planning and Finance, as of 2017-18 fiscal year, Yangon region's GDP contribution upped to 26.5% while GDP growth rate was measured at 6.8%. Myanmar has one of the highest GDP growth predictions – ADB (Asian Development Bank) expects Myanmar's GDP to grow by 7.2% in 2019.⁵ Performance of all three sectors have improved, especially the manufacturing industry under industry sector. There was a rise in agricultural outputs by an estimated 2.5 % in 2017-18 resulted from favorable weather conditions and increased demand.⁶

Figure 1: Top 5 Contributors to GDP by Region in 2017-18

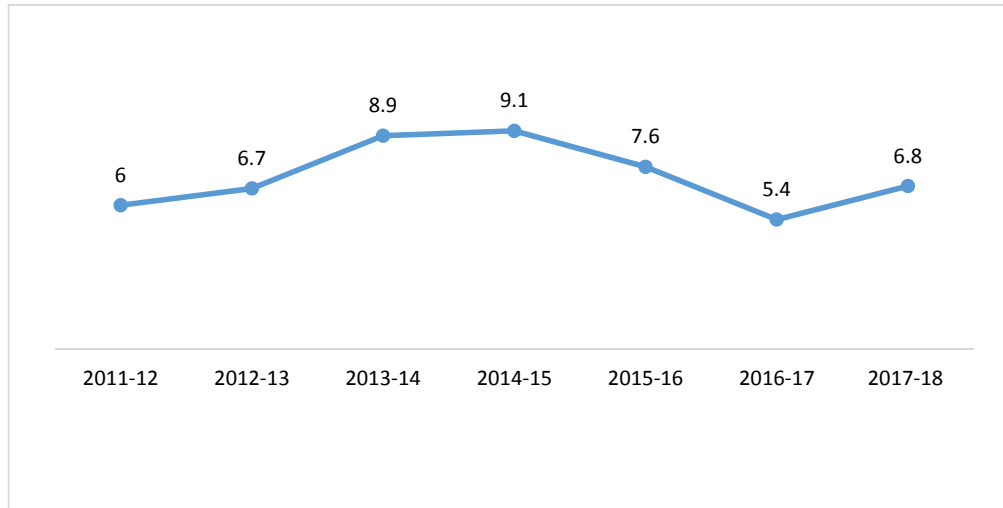


Source: Ministry of Planning and Finance

⁵ Myanmar: Economy | Asian Development Bank

⁶ Myanmar Economic Monitor 2018 | The World Bank

Figure 2: GDP Growth Rate (%)



Source: Ministry of Planning and Finance

According to Ministry of Planning and Finance, service sector is the largest contributor 41%, particularly in response to the sharp increase in trading – both export and import. Following are Industry 33%, and Agriculture 26%. According to Ministry of Commerce data, trading value was recorded as the highest in 2017-18 – it has increased from US\$29 billion in 2016-17 to US\$34 billion in 2017-18. To name a few, in 2017-18, rice export from Myanmar is amounted to be more than 3.5 million tons of rice, reaching the highest level in 50 years. Top export items were natural gas over US\$ 3 billion, CMP garment with US\$ 2.3 billion and rice with over US\$ 1 billion.

According to DICA (Directorate of Investment and Company Administration) data, FDI value has declined from US\$6.6 billion in 2016-17 to US\$5.7 billion in 2017-18. The major challenge for foreign investors is lack of a clear economic policy and plan. As a result, investors have reduced confidence to do business in Myanmar. It is heightened by political instability and armed conflicts in several regions, especially in Rakhine State in the country. Among three sectors, contribution by industry sector is expected to increase. With the largest share of approved FDIs observed under manufacturing sector and construction of new industrial zones, much growth is expected in industrial outputs.

3) Inflation and Exchange Rate

Inflation in Myanmar in 2016-17 was averaged to 7%, and 5.2% in 2017-18.

Exchange rate during the time of field work (May of 2018) was stable at 1,344 Kyats per dollar. Fluctuation started in July and Kyat Depreciation hit a record high during August of 2018.

Additionally, one to bear in mind is that salary adjustment is not dependent on exchange rate changes in Myanmar. To explain, typically, companies do not either raise or reduce salary of their employees during the times of unstable exchange rate.

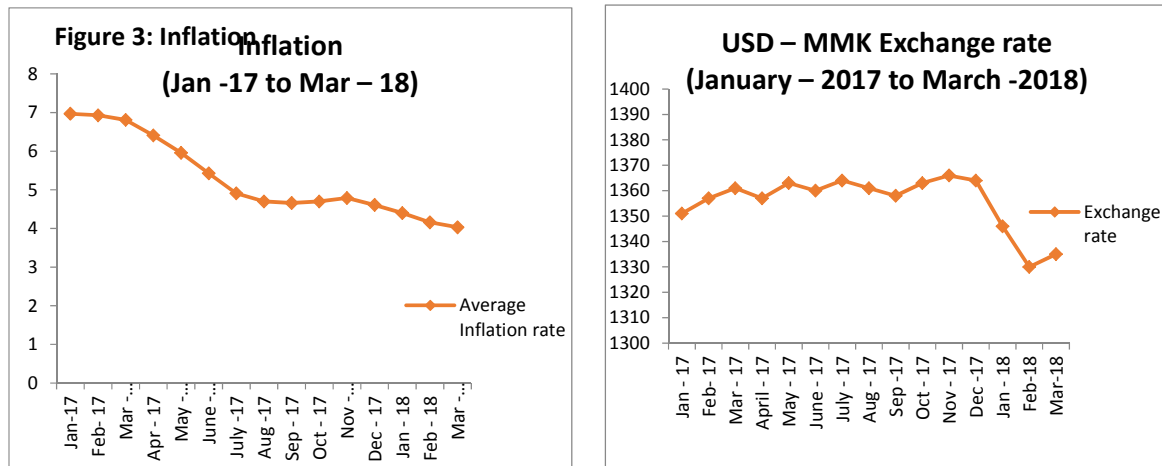
Average FE rates and inflation rates comparison

Year	2015	2016	2018 (Jan to Jul)
FE Rate (Kyat/US\$)	1,178	1,232	1,344
Inflation (CPI%)	9.99%	6.75%	7.56%

Sharp decline in Kyat value and macroeconomic instability have resulted in many businesses reducing confidence on business growth in the near future. In 2016-17, it was averaged to 1,245 kyats per a US dollar while in 2017-18, it was averaged to 1,355 kyats per a US dollar. It reached the highest rate at the end of 2017. As of March 2018, it stabilized at around 1,335 per a US dollar.

Myanmar’s businesses are largely dependent on importation of raw materials. Consequently, when it comes to challenges, rising cost, especially for manufacturing businesses, was among the most critical concerns. In addition, vast majority of businesses think taxation rates are higher than it actually should be and do not completely understand taxation system of the country. Growing illicit trading also hinders business growth and reduces businesses’ confidence. Businesses clearly see the government should prioritize on building strong economic infrastructure and financial resources.⁷

Figure 4: Exchange Rate



Source: Central Statistical Organization

⁷ Business Sentiment Survey Report 2018 | MMRD

4) Industrial Zones in Myanmar

Since 1990, establishment of industrial zone has started with the very first zone in Shwe Pyi Tar Township in Yangon Region. South Dagon Zone (1) and Hlaingtaryar Zone were implemented in 1992 and in 1995 respectively. The latest zone was Myaungtakar zone, set up in 2006. In total, as of now, there are 24 in Yangon Region.

There are 30 zones in Yangon Region, based in four districts in the region, making up four industrial zone groups in the region. However, there are some industrial zones in East district, North district and South district and some are having zone 1, 2 and 3 together and some are separated as zone 1 and zone 2. Most of the industrial zones in Yangon are implemented by Department of Human Settlement and Housing Development under Ministry of Construction whilst some are implemented by private companies. The largest one is Hlaing Tharyar industrial zone, where around 300,000 people work in more than 700 factories.

Most of the industrial zones in Myanmar do not conform to the industrial standards, instead they were built to relocate the factories in the city to out of the city. Among all industrial zones in Myanmar, Mingaladon Industrial Park was constructed according to the standards. Industrial zones are developed by DHSHD providing that the land area is owned by the department. As well, some were assigned contract to construction companies. Industrial Zones Supervision Committee are formed by related department officials and Industrial Zones Management Committee.

Chief Minister of the Yangon Region Government met representatives of parliament and the departments of relevant ministries to discuss plans to construct the new industrial zones. The new industrial zones are expected to increase the flow of foreign direct investments into Yangon as well as create more job opportunities for the locals. The Yangon Region Government has earmarked 11 townships in which an industrial zone can be constructed. These include townships from the southern districts of Yangon, such as Khayan, Thongwa, Thanlyin, Kyauktan, Kungyangon, Dala, Kawhmu and Twantay as well as the northern districts such as Hmawbi, Hlegu, Htantabin, Taik Gyi. The size of each industrial zone will be 1,000 acres. However, their exact locations were not revealed to prevent speculation in land and property within the area. While such industrial zones are expected to contribute to the economy by drawing FDI and creating jobs, the government needs to first ensure sufficient and reliable infrastructure such as electricity, roads and water, several companies involved in constructing the zones commented.

Table (1): Existing Industrial Zones in Myanmar

No	State/ Regions	Industrial Zone Name
1	Yangon	30 Industrial zones in 4 districts
5	Mandalay	Mandalay
6		Myingyan
7		Meiktila
8	Sagaing	Monywa
9		Kalay
10	Magwe	Yaenan Chaung
11		Pakokku
12	Bago	Pyay
13	Ayeyarwaddy	Pathein
14		MyaungMya
15		Hinthada
16	Shan	Taunggyi (Ayethaya)
17	Mon	Mawlamyaing
18	Thanintharyi	Myeik
19	Kayin	Hpa-an
20		Myawaddy

Source: Myanmar Industries Association

2. Key Legislation Development and Economic Highlights for Business Environment

A. Summary of significant context changes period 2014-2018

During the past four years, Myanmar has experienced key legislation developments –

- Myanmar Investment Law came into effect in 2016, replacing Foreign Investment Law 2012 and Myanmar Citizens Investment Law 2013;
- Myanmar Companies Law is to be enforced on 1st August of 2018 that will allow foreign investors to take up to 35 percent stake in domestic companies;
- The new Financial Institution law was enacted in 2016, replacing the old law which was enacted in 1990;
- The Condominium Law came into effect in 2017 that will allow foreigners to own up to 40 percent of space in one condominium project;
- Union taxation law was approved in March 2018. With the new law, the corporate income tax and commercial tax amount for 8 commodities are reduced;

Moreover, the economic and political highlights for business environment are as follows:

- Myanmar has one of the highest GDP growth predictions – ADB (Asian Development Bank) expects Myanmar's GDP to grow by 7.2% in 2019;
- As of February 2018, MIC has permitted 582 Myanmar-owned and 846 foreign-owned businesses, with investment value amounted to Ks708 billion from local businesses and US\$2.84 billion from foreign businesses;
- FDI (Foreign Direct Investments) stood at US\$5.7 billion in 2017-18 which showed significant slowdown compared with previous year - according to DICA (Directorate of Investment and Company Administration) data, FDI value has experienced downward trend – (US\$9.4 billion in 2014-15; US\$6.6 billion in 2016-17; US\$5.7 billion in 2017-18);
- International tourist arrivals declined by 4 %;
- Yangon Region has 29 industrial zones, and more than 6,200 small-and-medium enterprises;
- As of March 2018, in the Zone A (Phase A) of Thilawa Special Economic Zone, investments value amounts to US\$ 1.2 billion, with FDIs investments from 16 countries; 91 factories are being operated and 74 are under construction;

⁸ <https://www.mmtimes.com/news/union-tax-law-approved-without-tax-amnesty-clause.html>

- Yangon Regional Government has founded New Yangon Development Company Limited (NYDC) to develop a landmass twice the size of Singapore and launched as “Yangon’s New City”, which was launched on 20,000 acres west of Yangon River and is under initial stage to transform the area into “new city”;
- In March 2018, Myanmar Parliament elected U Win Myint as new President of the Republic of the Union of Myanmar, resulted from sudden resignation of previous President, U Htin Kyaw;

1) Myanmar Investment Law (MIL)

On 18th October 2016, Myanmar Investment Law (MIL) came into effect, replacing Foreign Investment Law 2012 and Citizens Investment Law 2013. Major objective of the new law is to not only create favorable business environment for local and foreign investors but also bring needed reform and liberalization to support Myanmar's fast-growing and changing economy at maximum levels.

Previously, all investment proposals have to go to MIC and wait for approvals regardless of its size. With the new law, only some businesses will have to be approved by MIC. Investments below US\$ 5 million will merely need approvals from state and regional governments. Tax exemptions by zones are also observed – 1) 7 years for less developed regions (zone 1); 2) 5 years for moderate developed regions (zone 2); 3) 3 years for adequate developed regions (zone 3).⁹

The new law represents a clear investment process with transparency and without discrimination. Remarkable points include 1) MIC to approve projects faster; 2) to narrow the role of MIC for projects approval; 3) Prohibited business areas to be made known by public; 4) To deliver the right to investment considering residency and not nationality¹⁰ so that foreigners (expatriates) are treated in the same way as local investors; 5) to encourage business sectors that can bring modern know-how technology and infrastructure development, realize value-added production, create job opportunities in multiple regions, etc.¹¹

2) Myanmar Companies Law

Both private and public sectors are looking forward to August 1 of 2018, when the law will be enforced. As observed from draft regulation, the law will allow foreign investors to take up to 35 percent stake in domestic companies, which stirred up hope and anticipation for increased investment– domestic and foreign businesses inclusively. It will also open up the Yangon Stock Exchange for non-Myanmar customers¹². Should the law be delivered, re-registration via electronic platform is required by every company in the country regardless of prior registration. Registration should be within 6 months starting from 1st of August 2018.¹³

3) Financial Institution Law

The new Financial Institution law was enacted in 2016, replacing the old law which was enacted in 1990. With the new law, banks in Myanmar are expected to operate in correspondence with

⁹ <http://www.conventuslaw.com/report/the-myanmar-investment-law-2016-and-rules-2017/>

¹⁰ Myanmar Economic Monitor 2017 | The World Bank

¹¹ [Analyzing the New Myanmar Business Law | Myanmar Insider](#)

¹² [Draft regulations of Companies Law released, go into effect in August | The Myanmar Times](#)

¹³ [Myanmar Companies Act an important key to transforming the economy | Mizzima News](#)

Myanmar Companies Law. It promises to deliver a stable and modern banking systems. It represents detailed guidelines for financial institutions ranging from commercial, state-owned, private and foreign banks.¹⁴

4) Condominium Law

The Condominium Law came into effect in 2017. According to the new law, foreigners are allowed to own up to 40 percent of space in one condominium project. No more than 25% of ownership is allowed to be registered under one particular owner (foreigner) name. A foreigner can resell, lease, or enter mortgage loans. In the case of death of the registered owner or exile, appointed person – either a foreigner or Myanmar citizen can inherit the condo. Furthermore, they will be allowed to build property given that it is approved by MIC. However, since they are not allowed to own the land, they need to work together with Myanmar nationals. In the case of developers, they will now be able to start selling condos just after finishing 30-35% of the foundation work.¹⁵ The law clearly defines necessary criteria to be approved as a public-owned condominium – it has to be built on registered publicly owned land with an area of no less than 20,000 square feet and have at least six floors.¹⁶

5) Union Taxation Law 2018

Union taxation law was approved in March 2018 while tax exemption law is to be enacted separately. As per the new law, corporate income tax and commercial tax amount for 17 commodities are reduced¹⁸ and industries such as real estate, automobile, and stock market are likely to perform better than before. In an attempt to create inclusive growth through SMEs, the new law is expected to help businesses to become responsible tax payers and support creating stable macroeconomic climate. According to UMFCCI Business Sentiment Survey in 2018 conducted by MMRD, taxation and tariff has become top major problem of businesses while kyat depreciation was top major problem in 2016 and 2017.

6) International ride-hailing apps make debut

In the first half of 2017, two international ride-hailing firms – Grab and Uber entered Myanmar market. A year before, local startups such as Hello Cabs and Oway Ride had launched their services. In February 2018, Grab launched “Grab for Business” targeted for companies and employees. More than 50 companies in Myanmar signed up during trail period in November 2017. In the same year,

¹⁴ <https://www.mmtimes.com/business/18698-parliament-passes-financial-institutions-law.html>

¹⁵ <https://www.mmtimes.com/news/new-condominium-rules-allow-more-flexibility-foreigners.html>

¹⁶ <http://www.myanmarinsider.com/new-condominium-law/>

¹⁷ <https://www.mmtimes.com/news/union-tax-law-approved-without-tax-amnesty-clause.html>

¹⁸ <http://www.globalnewlightofmyanmar.com/2018-union-tax-law-turning-point-dramatic-change-higher-economic-growth/>

Grab had 25,000 bookings a day and 6,000 drivers; Hello Cabs had 2,000 bookings a day and 1,200 drivers.¹⁹

7) Vehicle import policy changes market dynamics

In October 2017, a new vehicle import policy was launched. With the new policy, in the future, imports of only new left-hand-drive cars will be allowed. According to Myanmar Automobile Manufacturers and Distributors, in 2018, the Government allowed to import 25,000 cars in Yangon Region. Starting from June 2018, online registration for YVQC (Yangon Vehicle Quota Certificate) will be introduced and attempts are being made to provide license within 24 hours to car owners/users. Registration fees are different according to car type and engine power. Locally assembled and produced CKD/SKD cars will be charged only 10% of YVQC for Yangon license. Car models no earlier than 2016/2017/2018 models are permitted to attain Yangon license.²⁰

8) Thilawa Special Economic Zone SEZ

Thilawa SEZ is the first Special Economic Zone in Myanmar. Currently, in the Zone A (Phase A), investments value amounts to US\$ 1.2 billion. In the Zone A, 96 percent of the land has been used. Currently, 91 factories are being operated and 74 are under construction. FDIs investments from 16 countries can be observed.²¹

9) Yangon's Urban Planning and Investment Sector

With the number of increasing city dwellers, Yangon region has faced several issues ranging from transportation, flooding, and drought to water scarcity.

Government has started making efforts to build a more livable city in correspondence with urban development plan. As of April 2018, the regional government has approved Ks 32 billion for the construction of bridges in Yangon. In next year, the whole region will have 24 hours electricity that will be produced by three power plants. During past 3 years, there was a noticeable increase in mixed use development projects such as Junction City Tower, Yoma Central, Myanmar Centre etc.²²

Yangon Regional Government has founded New Yangon Development Company Limited (NYDC) to develop a landmass twice the size of Singapore and launched as “Yangon's New City”. The project is a part of Strategic Urban Development Plan of Greater Yangon by JICA. It was launched on 20,000 acres west of Yangon River and is under initial stage to transform the area into “new city” by developing housing units, infrastructures, industrial zones, and waste management system. It is

¹⁹ <https://frontiermyanmar.net/en/ride-hailing-market-heats-up-in-yangon>

²⁰ [Daily Eleven News | 26 May 2018](#)

²¹ [Two year performance of Yangon Region Government | Global New Light of Myanmar](#)

²² <https://www.mmtimes.com/news/ten-developments-shaped-economy-2017.html>

expected to create job opportunities for 2 million citizens. Daw Nilar Kyaw, Minister for Electricity, Industry and Transportation of Yangon Regional Government, was appointed as Chairman of the project and U Thein Wai, Chairman of Serge Pun and Associates (SPA) will act as CEO of the project.²³The new project has become a controversial issue between Yangon Region Government and Yangon Hluttaw (Parliament) regarding project transparency.

Cooperating with Yangon Regional Government, Ministry of Construction is inviting tenders for an elevated four-lane ring road expressway project in Yangon. The expressway is about 47.5 kilometers. It is expected to connect Downtown Yangon, Yangon Port, Yangon International Airport, Mingalardon Industrial Park and the Yangon-Mandalay Expressway.²⁴

Furthermore, discussions have been going on with investors from South Korea, Japan and China for infrastructure development, power, housing construction and factories. As of February 2018, MIC has permitted 582 Myanmar-owned and 846 foreign-owned businesses, with investment value amounted to Ks708 billion from local businesses and US\$2.84 billion from foreign businesses.²⁵

²³ [Local, foreign investors invited to participate in Yangon's new satellite towns project | Myanmar Alinn](#)

²⁴ [Request for Expressions of Interest dated May 18, 2018 Ygn Expressway PPP Project | The Global New Light of Myanmar](#)

²⁵ [Two year performance of Yangon Region Government | Global New Light of Myanmar](#)

3. Political Highlights

1) Myanmar Parliament Elects New President

In March 2018, Myanmar Parliament elected the new President of the Union of Republic of Myanmar, resulted from sudden resignation of previous President, U Htin Kyaw. On 30th March 2018, U Win Myint, former speaker of parliament took oath of office as the President and delivered his inaugural speech, listing priority goals of Union Government.

Priority goals of Union Government to be implemented are as follows:

- 1) Rule of law and improvement of socio-economic life of the people
- 2) National reconciliation and internal peace
- 3) Amending the constitution which is the foundation for building a Democratic Federal Republic

Furthermore, the President brought up that more efforts need to be exerted relating the country's weak judiciary system, corruption, illicit trading, land ownership issues, and access to higher education.

2) Deterioration of Security and Armed Conflicts in Rakhine State

Rakhine State has been receiving attention on the international stage regarding Rohingya issue. In 2012, conflicts between Rakhine Buddhists and Rohingya Muslims were initiated.

The current conflict began in October 2016 when Arakan Rohingya Salvation Army (ARSA) insurgents attacked Burmese border posts along the Myanmar-Bangladesh border, followed by attacks on 30 police posts and an army camp in August 2017, killing about 12 people.²⁶ In addition, nearly 100 Hindu villagers were massacred by ARSA insurgents which was assumed to be terrorism. Consequently, Myanmar Tatmadaw's security response caused more than 650,000 Muslims refugees to have fled Rakhine State.

In May 2018, a delegation of UN Security Council visited Myanmar and observed Rakhine State. Regarding the visit, Myanmar government made a statement –

- 1) The Myanmar government is ready to start repatriation process although Bangladesh side has been postponing.²⁷
- 2) 57 recommendations from Mr. Annan Commission will be fulfilled shortly
- 3) National Verification Card holders who meet requirements can become Myanmar citizens.²⁸

²⁶ https://en.wikipedia.org/wiki/Northern_Rakhine_State_clashes

²⁷ [Myanmar Permanent Representative made a statement on the UN Security Council's visit to Myanmar | The Global New Light of Myanmar](#)

Relating the conflict, there have been noticeable negative impacts. FDI (Foreign Direct Investments) stood at US\$5.7 billion in 2017-18 which showed significant slowdown compared with previous year and international tourist arrivals declined by 4 %. Furthermore, given that current economic sanctions are continuing, it would be worrying and is likely to have larger effect on the country's economy. Amidst of many challenges Myanmar is determined to overcome, political instability is a major driver in reducing investors' confidence. It clearly is slowing down much expected economic development. This issue remains a topic of concern and a biggest challenge to overcome for the government and local people.

²⁸ [Myanmar Permanent Representative made a statement on the UN Security Council's visit to Myanmar | The Global New Light of Myanmar](#)

Annex-2 Educational Outlook in Myanmar

1. Educational Outlook in Myanmar

Myanmar education system can be divided into two parts – formal education system and vocational education system. Through formal education system, there are 1) basic education – primary school, middle school, and high school, and 2) higher education – colleges, degree colleges and universities. Vast majority of students in Myanmar pursue education provided by government-run public schools and licensed/domestically owned private schools while there are students from privileged backgrounds who go to international schools. The curriculums provided at international private schools are different from government schools and licensed/domestically owned private schools, and students later go abroad to get higher education. As of 2017-18, there are 42,804 government basic education schools, and 176 universities and colleges of which 134 are managed by Ministry of Education, while there are 142 international universities/colleges, and 1,115 private basic education schools.²⁹

For those who are unable to continue formal education, there are technical institutions run by government as well as private sector. There are 104 government vocational training centers from 15 ministries and 1,710³⁰ private vocational training schools in Myanmar for subjects ranging from engineering, hotel & gastronomy, hair & beauty, media and communication, nursing and health care, and fashion design to sewing & tailoring. Alternatively, children in Myanmar who cannot afford education attend schools operated by religious or ethnic groups, for example, monastic schools.

Table 1: Government Schools, University/Colleges and Private education

No.	Type of School	Total Number of School	Programs
1	Government Basic Education Schools	42,804	Primary School Middle School High School
2	Government Universities/Colleges	176	Medicine Nursing Veterinary Technological University Aerospace and Engineering Computer Economics Education

²⁹ Education Directory and Guide 2017-18 | MMRD

³⁰ Education Directory and Guide 2017-18 | MMRD

			Agriculture Science Arts and Culture Foreign Languages
3	Private Basic Education Schools	1,115	Pre School Primary Secondary Upper Secondary Licensed High Schools (Locally owned)
4	International Universities/Colleges	142	Business Management Medicine Computer Engineering

2. Education Reform

The government has acknowledged the fact that Myanmar’s education system has lagged far behind and hence, put education at the heart of its reform agenda. In 2016-17, the government doubled the budget for education to deliver a quality education and motivate teachers by raising salary.³¹ Education budget has increased from 0.7% of GDP in FY 2011-12 to 7% in FY 2016-17. Recently, EU approved €221million grant to promote quality education.³² To support national education sector, Ministry of Education has formed National Education Policy Commission, National Curriculum Committee, and National Quality Assurance Assessment Committee during past two years. By cooperating with international organizations such as UNICEF and Kubota Company, the government has provided educational assistance such as exercise books and school bags to students with hearing and sight impairments.³³

Reform in education will be divided into basic education, higher education and vocational and technical training sectors.

Basic Education Level

At the basic education level, in an attempt to realize free and compulsory primary education, in academic year 2015-16, Ministry of Education (MoE) spent K29 billion to provide necessary stationery to all students. Since academic year 2016-2017, all five years old children have been attending KG and all six years old children have been attending Grade-1. In 2016-17 academic year, a new kindergarten curriculum was introduced and the duration for schooling was increased to 13 years (KG+12). In 2017-18 academic year, a new curriculum for Grade 1 students was introduced.

³¹ <http://www.elevenmyanmar.com/local/5798>

³² <http://www.globalnewlightofmyanmar.com/eu-approves-e221-mln-grant-myanmar-promote-quality-education/>

³³ [Achievement of Ministry of Education in the past two years | Global New Light of Myanmar](#)

Courses for teachers were held in the 2018 summer holidays to start a new curriculum for Grade 2 in academic year 2018-19.³⁴

For high school education, more exam centers were set up during past two years. Students sitting for matriculation exam has increased from 714,000 in 2017 to 840,000 students in 2018.³⁵ The government is striving to transform teaching system: student centered rather than teachers centered; thinking rather than rote learning. With this purpose, the government has launched the National Education Sector Plan (NESP) 2016-21. In addition, the government has planned to change matriculation exam question format.³⁶

Higher Education Level

At the higher education level, two-year education colleges are being upgraded to four-year education degree colleges. As of 2017-18, there are a total of 176 universities and colleges of which 134 are under the management of Ministry of Education. Number of students has increased from 835,000 in 2016-17 to 879,000 students in 2017-18.³⁷

However, apparently, Higher Education level has been struggling to meet much required international standards. With slow progress, the gap regarding capacity – intellectual skills and qualifications, and salary rate in job market between local graduates and repatriates is likely to continue. Since 2011, there has been significant increase in number of repatriated Myanmar citizens, which is the result of open economy.

According to UNESCO data, between 2011 and 2016, an average of 7200 students per year left for foreign countries to pursue higher education. Asian countries, namely, Thailand, Singapore, and Malaysia are among the most popular destinations. American education has also become popular among students – 1194 students studied there in 2017.³⁸ This trend is likely to continue providing that little effort are being made by Government to raise the standard of Higher Education.

Vocational Education Level

Myanmar's demographic profile is favorable because of large youth population. However, the labor market suffers from underemployment, under-education and low-skills. In August 2017, Yangon Region Chief Minister U Phyo Min Thein said that the Yangon government had plans to collaborate with Ministry of Education to run more vocational training schools to help youth dropouts to get job opportunities. The government encourages technical institutions to conduct short-term courses. In

³⁴ [Achievement of Ministry of Education in the past two years | Global New Light of Myanmar](#)

³⁵ [Achievement of Ministry of Education in the past two years | Global New Light of Myanmar](#)

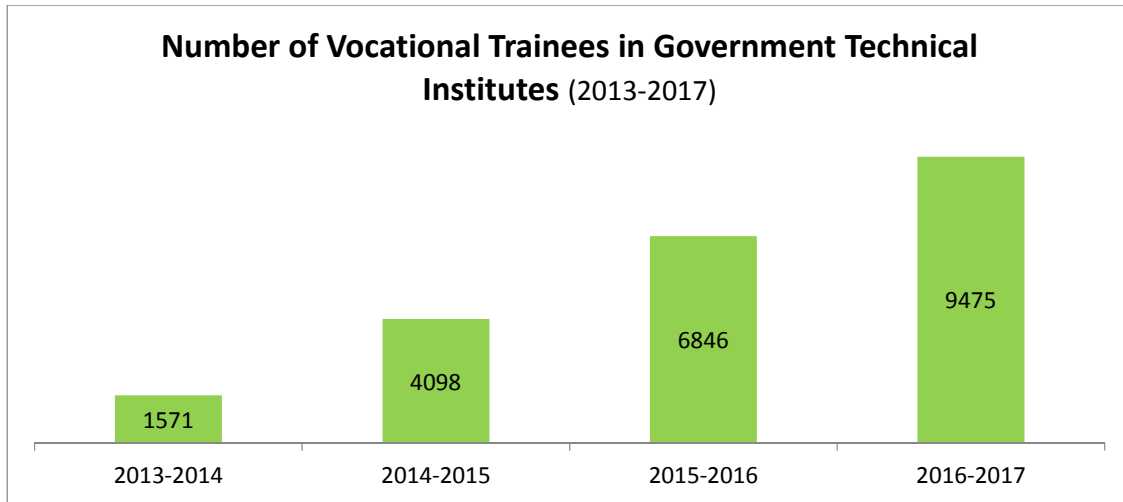
³⁶ [Achievement of Ministry of Education in the past two years | Global New Light of Myanmar](#)

³⁷ [Achievement of Ministry of Education in the past two years | Global New Light of Myanmar](#)

³⁸ [Myanmar Report 2018 | Oxford Business Group](#)

the past three years, Nyaungshwe Vocational Training Institute (NVTI) and Singapore-Myanmar Vocational Training Institute (SMVTI) were established, where fourteen short-term courses were conducted.³⁹ As of 2016-17, the number of vocational trainees in government technical institutes upped to 9,475.

Figure 1: Number of Vocational Trainees in Government Technical Institutes



Source: 2017 Myanmar Statistical Year, CSO, Ministry of Planning and Finance

3. Rising private and international schools and higher education institutions

With the middle class expansion, there is a noticeable shift in spending on education from the government-run public schools to private schools/international schools. The number of private schools in Myanmar has grown from over 50 in 2012-13⁴⁰ academic year to 1115 in 2017-18.⁴¹ The private side is governed by the 2011 Private School Registration Act.⁴² Since April 2018, The Myanmar Investment Commission (MIC) has permitted foreigners to make full capital investments in private schools in Myanmar. They can adopt a curriculum provided by either Ministry of Education (MoE) or international curriculum.⁴³ With the increasing number of partnerships and collaborations

³⁹ Achievement of Ministry of Education in the past two years. | Global New Light of Myanmar

⁴⁰ Why private schools are the better choice | The Myanmar Times 15 May 2017

⁴¹ Education Directory 2018 | MMRD

⁴² Myanmar Report | Oxford Business Group

⁴³ <https://www.mmtimes.com/news/myanmar-permits-full-foreign-capital-investments-education-sector.html>

between local and foreign universities, it can be expected that this sector will grow further and more students will prefer to obtain international standards education in Myanmar.⁴⁴

4. Role of Vocational and Technical Education in National Education Strategic Plan 2016-2021

Implementing high-quality technical and vocational education for sustainable socio-economic development is one of three main goals MoE commits to achieve by the end of FY 2020-21. The action plan is as follows - 1) to establish an integrated TVET system 2) to increase and upgrade existing TVET programs 3) to undertake short courses to increase access to TVET 4) to establish TVET Centers of Excellence in Yangon and Mandalay regions 5) to expand stipends and scholarships for disadvantaged students. By 2021, NESP aims to achieve more TVET opportunities in rural areas, and pathways from TVET to higher education.⁴⁵

⁴⁴ Oxford Business Group, Changes to Myanmar's Education Sector Needed, 2016

⁴⁵ National Education Strategic Plan 2016-21 | Ministry of Education

5. Future Plans of Department of Technical and Vocational Education (DTVE)

1) Japan Myanmar Vocational Training Institute (JMVTI)

Through cooperation with NPO Institute for Environmental Technology Promotion in Asia, Ministry of Science and Technology (Now Ministry of Education) is to develop JMVTI (Japan Myanmar Vocational Training Institute). The two parties signed MoU on 23rd June 2014. Negotiations are being made to run programs such as auto mechanic, metal and machinery processing, process control, electric work, CAD and CAM and attain Official Development Assistance (ODA) from the Japanese Government.

2) Cooperation with Kake Educational Institution

DTVE (Department of Technical and Vocational Education) signed Memorandum of Understanding (MoU) with Kake Educational Institution from Japan in October 2015. Efforts are being made to open technical high school in 2019.

3) Cooperation between OVEC from Thailand and Agency for Technical Cooperation and Development (ACTED)

The Office of the Vocational Education Commission (OVEC) from Thailand and Agency for Technical Cooperation and Development (ACTED) signed Framework of Cooperation in May 2014. Through cooperation between the two parties, short term vocational training courses were delivered at Government Technical Institute in Loikaw. In addition, 12 teachers from Loikaw Technical Institute were sent to Thailand to attend TOT courses to become qualified teachers.

4) Cooperation between OVEC from Thailand and Adventist Development and Relief Agency (ADRA)

The Office of the Vocational Education Commission (OVEC) from Thailand and Adventist Development and Relief Agency (ADRA) signed Framework of Cooperation in May 2014. Through cooperation between the two parties, short term vocational training courses were delivered at Government Technical Institute in Hpa-An. In addition, 6 teachers from Hpa-An Technical Institute were sent to Thailand to attend TOT courses to become qualified teachers.

5) Cooperation with Korea International Cooperation Agency (KOICA)

DTVE signed MoU with Korea International Cooperation Agency (KOICA) to establish TVET Teachers Training Institute (TTTI) in September 2015.

6) Malaysia-Myanmar Institute for Vocational Training (MMIVT)

Further negotiations between DTVE and representatives from VIVA GLOBAL EDUCATION and TOC Automotive College are to be made to sign MoU in order to implement MMIVT Project.

7) Cooperation with Asia Development Bank (ADB)

ADB approved US\$2 million to support Skills Development for Inclusive Growth Technical Assistance. In addition, DTVE is to open Bricklaying Courses, Bar Bending Courses, Concrete Form Work/Shuttering Courses, Road Construction (dirt road, culverts courses). Efforts are being made to deliver “Preparing Youth for the Workplace Program.”

8) Cooperation with Owned Development Banks of German Government – KfW and GIZ

Through trilateral cooperation among Myanmar, Indonesia and GIZ, coaching programs are in progress to improve skills of teachers working at DTVE. Since 2012, the project undertaken by Germany led organization, GIZ, supports improvement of strategic, conceptual and regulatory framework for vocational education in the four pilot regions of Yangon, Mandalay, Taunggyi (Shan State), and Sinda (Bago Region).⁴⁶ After ending evaluation of the project in 2016, TVET (Technical Vocational Education and Training) cooperation between Myanmar and Germany was brought to next phase.⁴⁷

9) TVET Reform Program

In September 2014, discussions were held to establish Teacher Training Institute in Belin in Kyaukse, to upgrade eight Government Technical High Schools by getting technological assistance from GIZ. It is expected to start the project in FY2017-18. In addition, an expert team from KfW bank visited Yangon, Mandalay and Taunggyi and conducted feasibility study to establish Integrated Polytechnic Institute.

10) Cooperation with East Asia Summit (EAS) TVET Provider Network

East Asia Summit (EAS) TVET Provider Network was founded to share experience and knowledge among member countries, promote capabilities, and provide guidance and assistance for donor countries. The Network consists of Australia, Brunei, Cambodia, China, India, Indonesia, Japan, Laos, Malaysia, Myanmar, New Zealand, Korea, Russia, Singapore, Thailand, Philippines, America, and Vietnam. Phase one of TVET Provider Network project was completed with assistance from Australia and phase two is in progress with assistance from South Korea.

⁴⁶ <https://www.giz.de/en/worldwide/17777.html>

⁴⁷ [Myanmar and Germany prepare the next phase of development cooperation in TVET](#)

6. Challenges of Myanmar's Education Sector

Myanmar, as a top frontier market in the world, is expected to create job opportunities for all walks of life. Education is an answer to enhancing economic competitiveness as well as sustainable development of Myanmar's economy. Bearing this in mind, the government should both undertake and speed up reform processes to address major challenges as below.

Higher Education Level

The current education system is a major concern for Myanmar to present itself on the global stage. With increasing global enterprises and an open economy, it is of great importance to deliver quality graduates who have global mindset and are ready for any workplace. Attempts should be made to transform Higher Education system in Myanmar at all levels – teachers, tools and teaching aids, infrastructures, curriculums, subjects, teaching system and participation of students – to address skills gap. Government universities, colleges/degree colleges have to consider graduates' long term career paths to tackle increasing unemployment rate, resulted from failure to meet standards of changing and challenging workplaces.

Vocational Education Level

Access to Technical and Vocational Training centers is a major issue to overcome. More pathways from High School to TVET should be created for both high school drop outs and failed students. In 2017, 716,188 students sat for matriculation exam of which 242,736 passed, which represents 33.89%. In 2018, 789,845 students sat for the exam of which 259,191 passed, which represents 32.82%. It is one to consider for the remaining 65-70% every year of which majority of them stop schooling to take the exam again next year. In this case, TVET centers should be reachable for those students to stay on track and pursue decent careers later in their life. The Myanmar government should focus on collaboration with other countries' governments to establish more centers, especially in rural areas. According to World TVET Database Myanmar, there are a few other challenges – 1) mismatch between training and skills; 2) lack of adequate industry participation; 3) inadequate vocational training infrastructure; 4) lack of a tripartite (government, employer and worker) approach; 5) insufficient number of trainers.

7. Key Vocational Training Centers and Programs in Yangon

1. Center of Vocational Training Myanmar

Background and Programs

CVT is a non-profit making organization, founded in 2002. It is a Swiss Association registered in Myanmar as INGO. It adopts “Dual Vocational Education”, where practice and theory are combined and working with its partner companies.⁴⁸

CVT is delivering their programs through three levels – Education for Youth, Vocational Education Training, and Post Graduate Programs. Programs include Education for Youth (E4Y), Vocational and Educational Training (VET), and Post Graduate Programs. The number of graduates per year is approximately 300.⁴⁹

Criteria for application are different according to program.

2. Daw Khin Kyi Foundation

Background and Programs

Daw Khin Kyi foundation was established in 2012 by Daw Aung San Suu Kyi, State Counsellor of Myanmar. It is a non-profit charitable organization and working with local and international agencies and partners. Its purpose is to promote health, education and living standards of people, especially in the least developed area. Main program is Hospitality and Catering Training Academy. Other programs include Civic Education, English Language Training Courses and Literary talks. The number of graduates per year from Hospitality and Catering Academy is approximately 120.

Criteria for Application

Aged 18-25 youths who at least have passed high school and blood test are eligible to apply for programs. Duration of each course is 6 months and five days a week. Upon course completion, students require to join 2-months internship programs at either in-house restaurant/guest house or other partner hotels and restaurants.

⁴⁸ <https://www.cvt-myanmar.com/about-cvt/about-us/>

⁴⁹ [CVT-Annual-Report-2016-17](#)

3. Singapore-Myanmar Vocational Training Institute

Background and Programs

SMVTI is a joint project between the Governments of the Republic of Singapore and the Republic of the Union of Myanmar. MoU between the two governments was signed in April 2014 and the renovation for the campus started in March 2015. It was opened in September 2015. SMVTI aims to support Myanmar's human resource development, particularly in the area of vocational skills in demand, for Myanmar's youths and adult learners.⁵⁰

Programs include Hotel & Tourism – Retail Operations (RTO), Restaurant Operations (RSO), Housekeeping Operations (HSO), and Front Office Operations (FOO). The total number of apprentices accepted per year is 400.

Criteria for Application

Aged 16-30 youths who at least have passed high school and blood test are eligible to apply for programs. Students have to sit for entrance exam. Duration of each course is 6 months and five days a week. Theoretical lessons take 30% of course time while practical lessons take 70% of course time.

4. Hotel and Tourism Training Center

Background and Programs

Hotel and Tourism Training Center has been in Yangon since 1993. The Myanmar Government provides venue, infrastructure and management. The funding is supported by the United Nations Development Program. Experts, training aids, teaching materials and syllabi are provided by International Labor Organization ILO.

Programs include Front Office, Housekeeping, Bartending and Stewarding, European Food Production & Bakery, Food Production, Sales & Marketing, Oriental Food, Travel Consultant. The number of graduates per year is approximately is 20,300.

Criteria for application are different according to program.

⁵⁰ <https://www.smvti-mm.org/>

5. Comparison of Programs and Courses by Key Private Vocational Institutions in Yangon

Table 1: Comparison of Programs and Courses by Key Private Vocational Institutions in Yangon

NO.	Name of Vocational Institution	Programs	Courses	No. of Current Apprentices	No. of graduated Apprentices per year
1	Daw Khin Kyi Foundation	Hospitality and catering	1) Hospitality Foundation	90	88
			2) Hospitality Advanced		
			3) Culinary Foundation	40	39
			4) Culinary Advanced		
		Civic Education	1) Civic duties		
			2) Civic citizenship		
3) Civic rights					
English Language Training					
Literary					
2	Singapore Myanmar Vocational Training Institute	Engineering & Technology	1) Electrical & Electronics	80	400
			2) Engineering Services	80	
			3) Facilities Management	80	
		Hospitality & Tourism	1) Hospitality & Tourism	80	
			2) Hospitality & Services	80	
3	M Hospitality & Tourism Institute	Hospitality & Tourism	1) Front Office	30-40 per week	1500-2000
			2) Housekeeping	30-40	30-40
			3) Bartending and Stewarding I	50-70 per week	2500-3000
			4) European Food Production & Bakery	60-80 per week	3000-4000
			5) Food Production	80-90 per week	3500-4000
			6) Sales & Marketing	30 per week	1500
			7) Oriental Food	60-80 per week	3000-4000
			8) Travel Consultant Operator I	30-40 per week	1500-2000
			9) Travel Consultant Operator - II	30-40 per week	1500-2000

4	Center for Vocational Training Myanmar	E 4 Y – Education for Youth	1) Literacy & communicative skills training	133	25
			2) Vocational skills training		
			3) Social & environmental skills training		
		VET – Vocational and Educational Training	1) Cabinet Maker	516	100
			2) Metal Worker		
			3) Electrician		
			4) Commercial Assistant		
			5) Hotel & Gastronomy		
			6) General Education		
		Post Graduate Programs	1) In-Company Trainers Program (ICT)		180
2) CVT Certified Instructor					
3) Young Entrepreneur for Myanmar (YE4M)					

Annex-3 Training Company – Employer

Figure 1: Year of Establishment

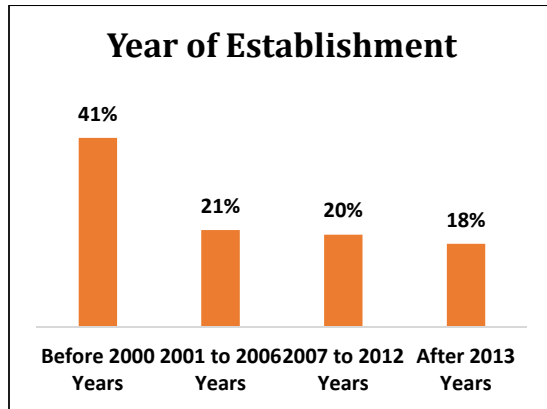


Figure 3: Scale and size of the business

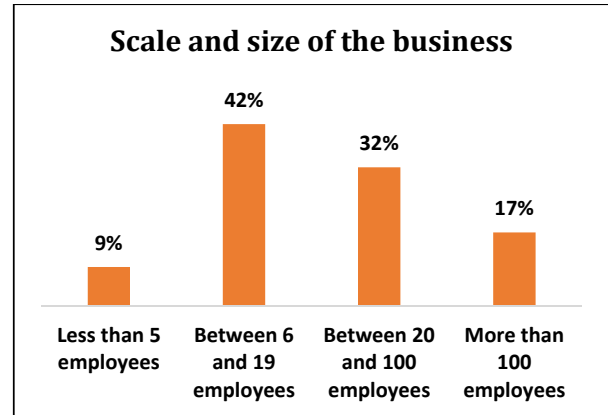


Figure 2: Year of Registration

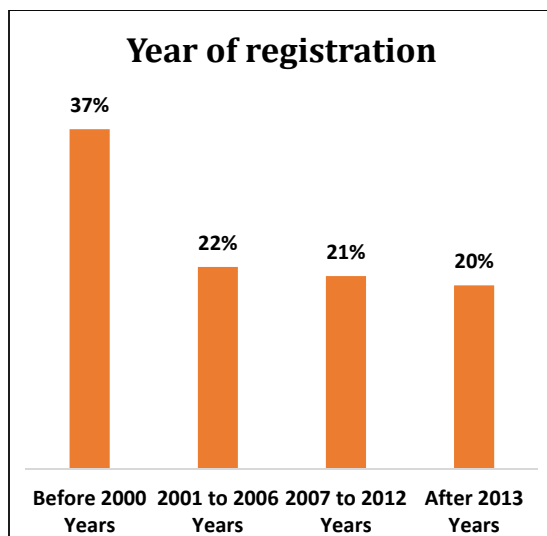


Figure 4: Plan for business expansion

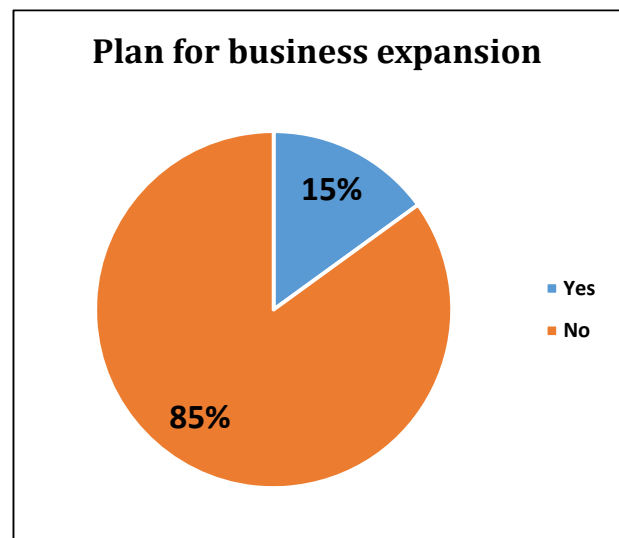


Figure 5: Regions or states for expansion

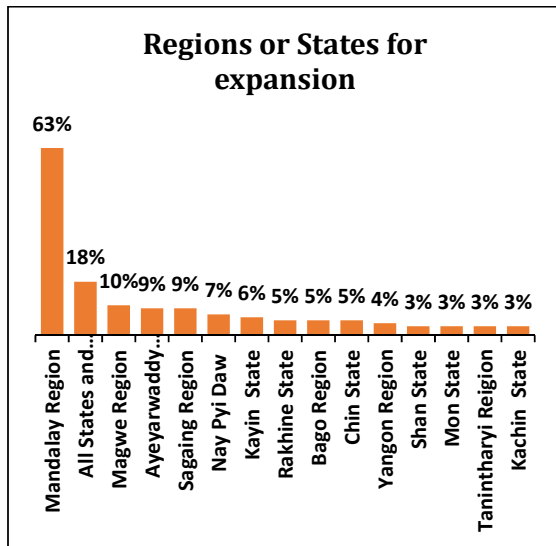


Figure 7: Name of the training program (non-CVT)

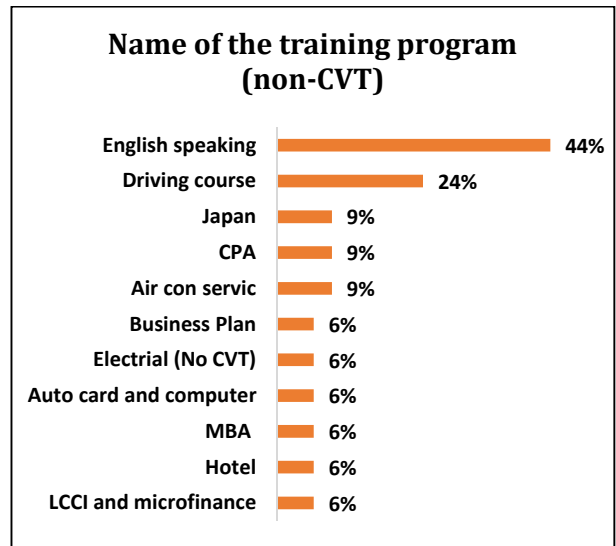


Figure 6: Employers who allowed their employees to join the training (apart from CVT)

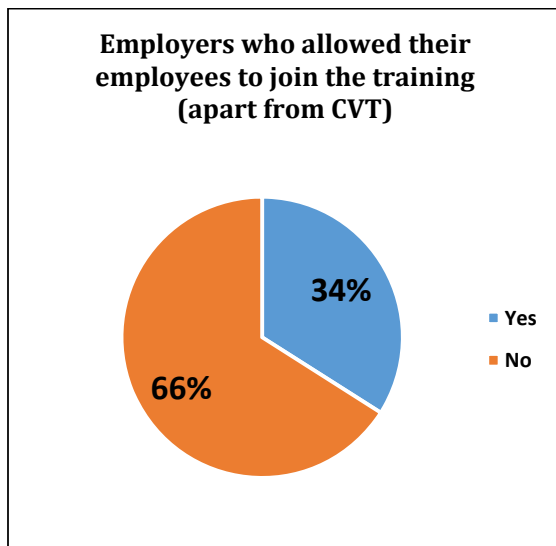


Figure 8: Number of employees allowed joining the program (non-CVT)

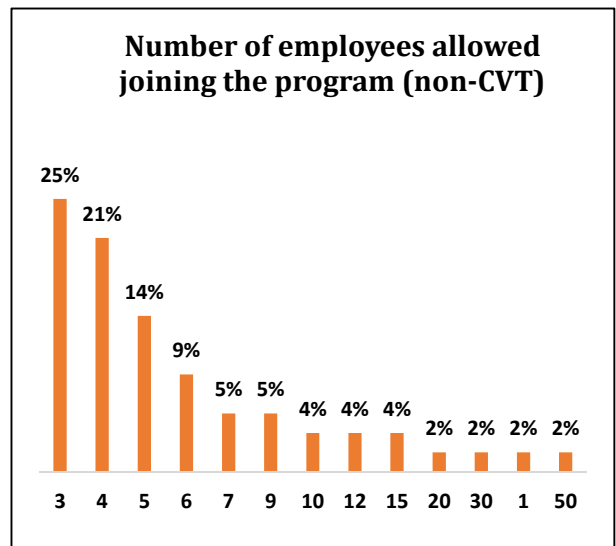


Figure 9: Employers who know CVT offers other services to connect businesses

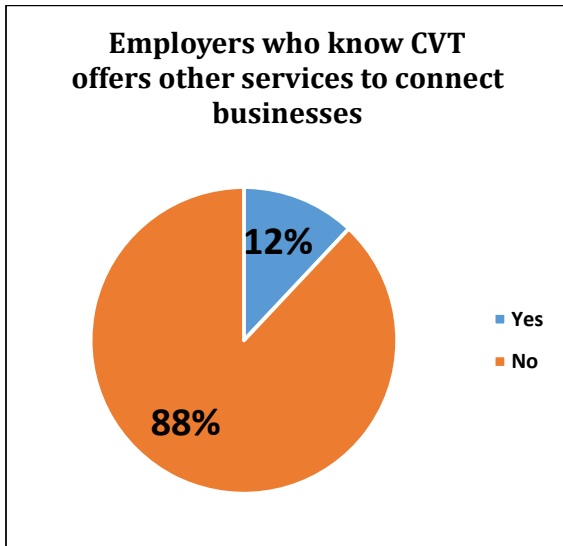


Figure 11: Number of employees attending CVT currently

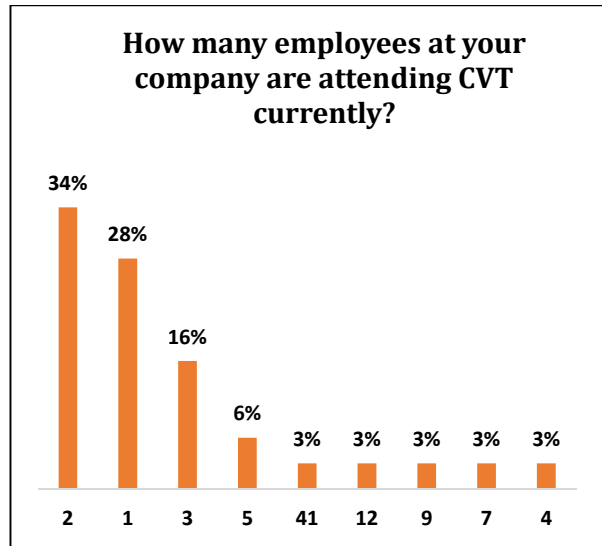


Figure 10: Year of Enrolment



Figure 12: Opinion on sending more employees

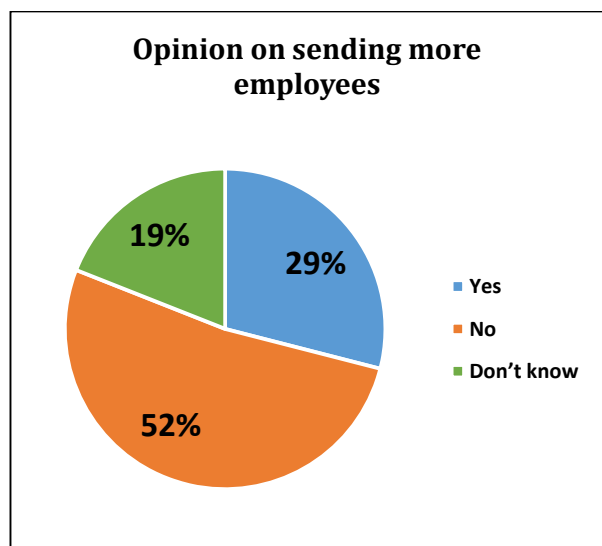


Figure 13: Opinion on capacity at work

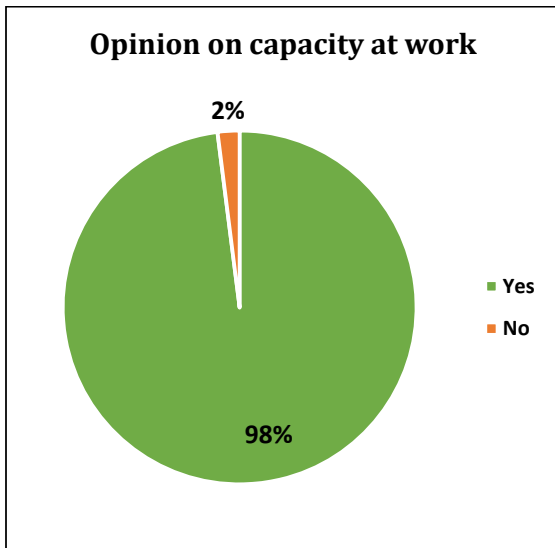


Figure 15: Opinion on meeting expectation

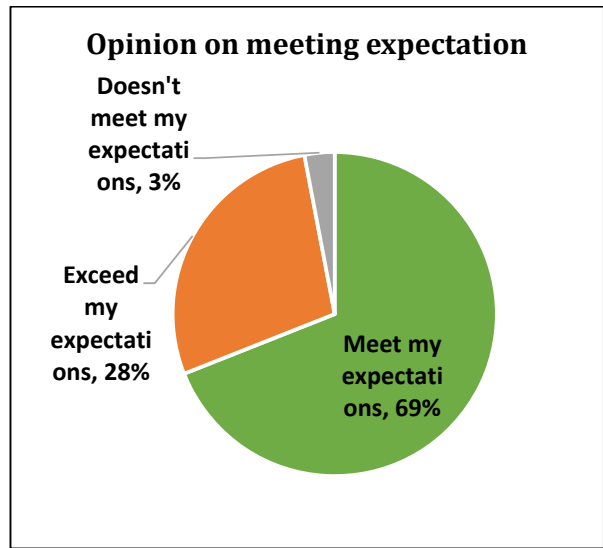


Figure 14: Opinion on efficiency and productivity

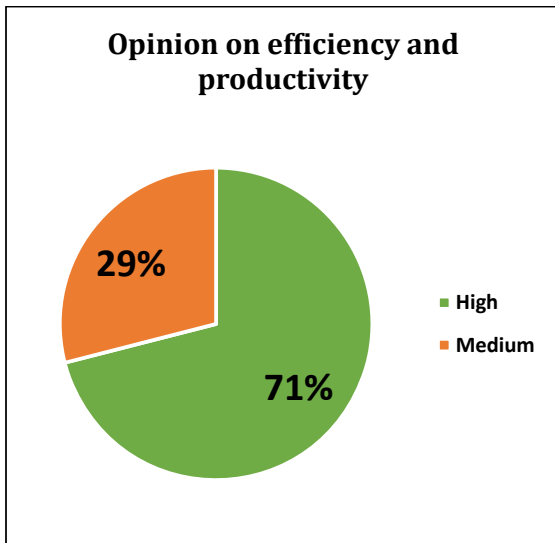


Figure 16: Satisfaction with CVT training programs

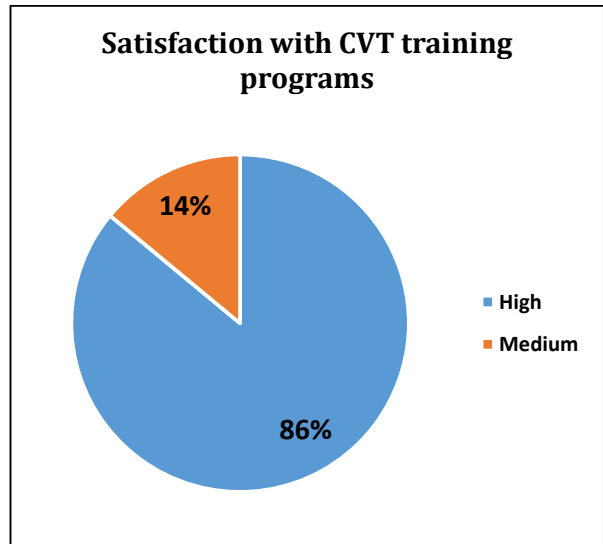


Figure 17: Promotion after attending CVT program

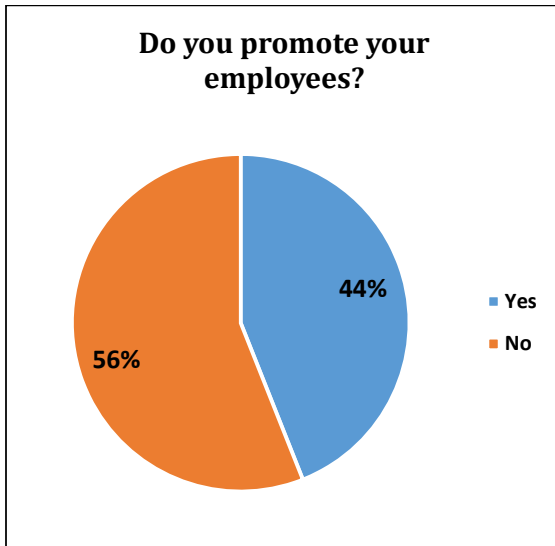
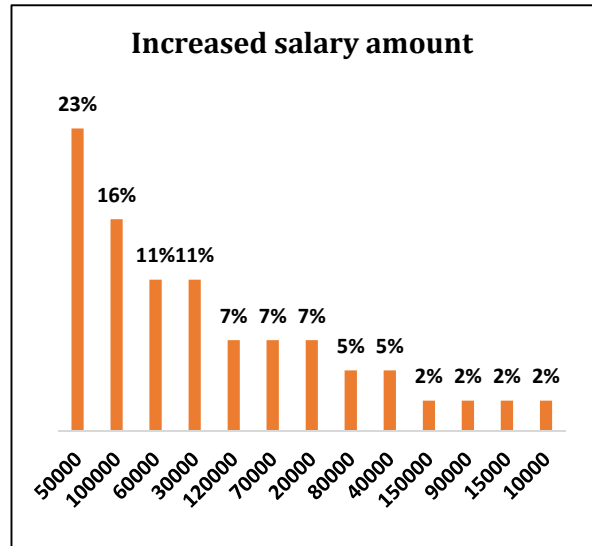


Figure 18: Increased salary amount (Kyat)



Annex-4 Graduated Apprentices - Employee

Figure 1: Age of respondents

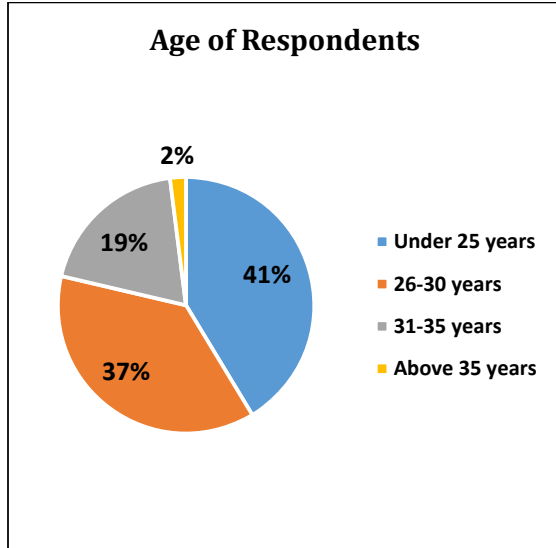


Figure 3: Education level of the graduates

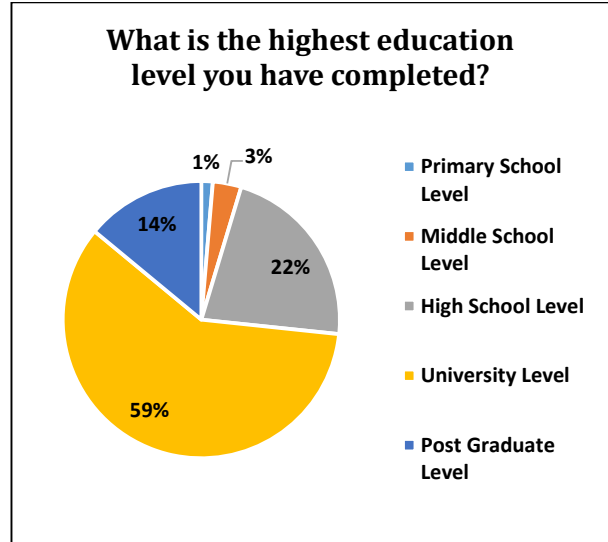


Figure 2: Gender

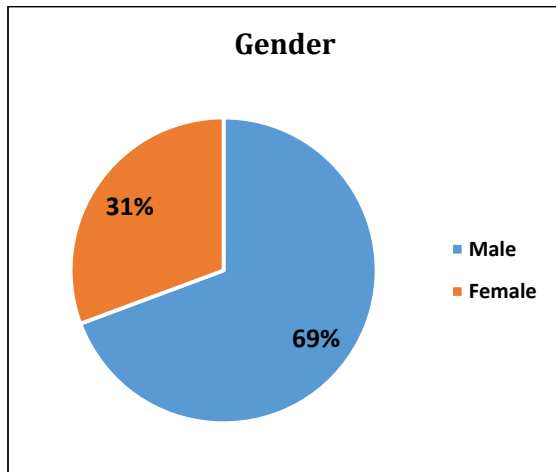


Figure 4: Employment

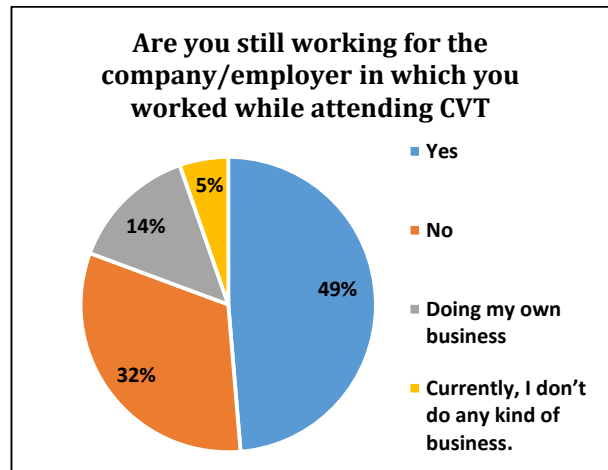


Figure 5: Relevancy of the program to the job

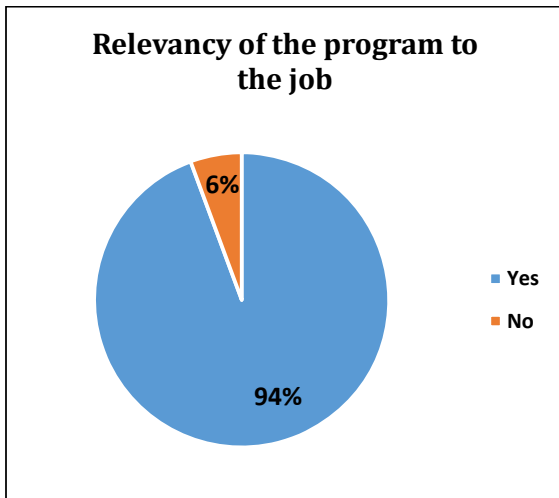


Figure 7: Subjects that are not useful

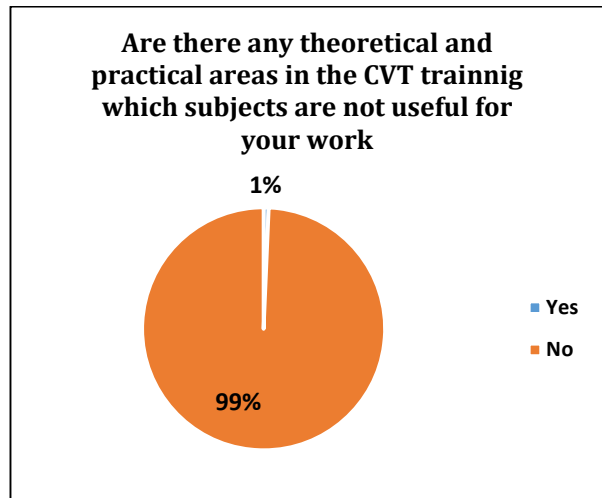


Figure 6: Scale and size of company/work

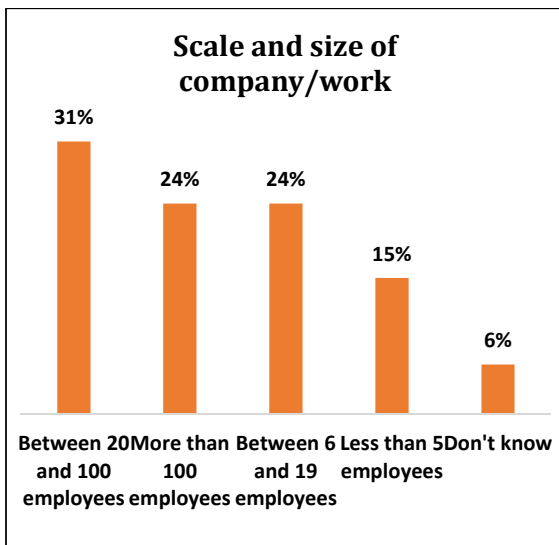


Figure 8: Opinion on apprenticeship time

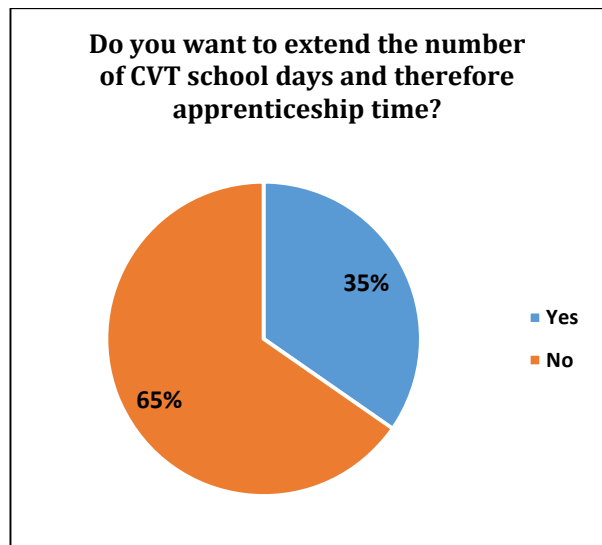


Figure 9: Opinion on PTC's training duration

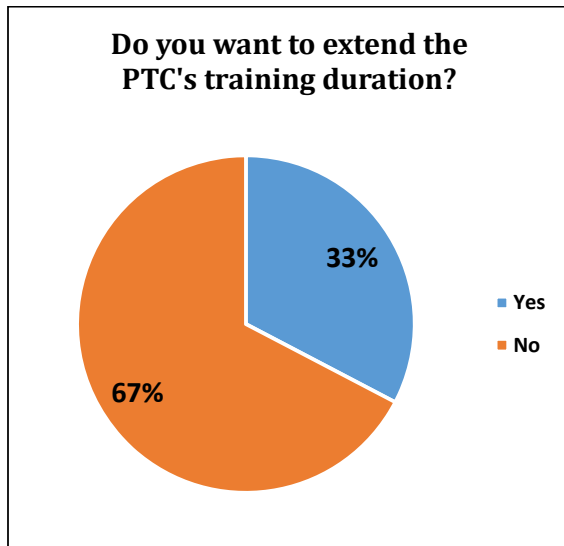
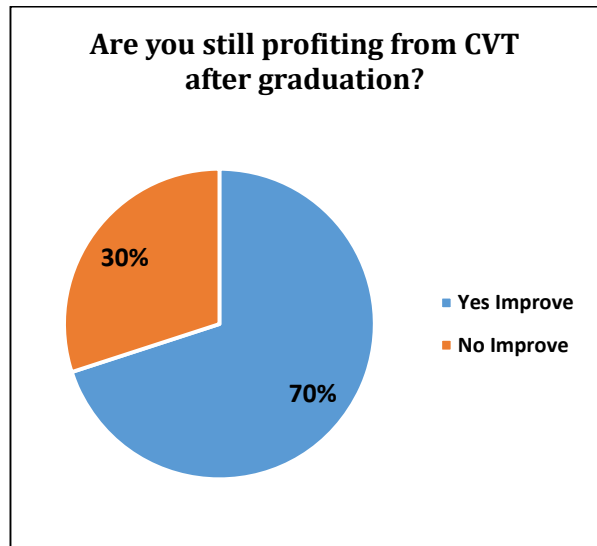


Figure 10: Improvement after CVT



Annex-5 In-company trainer – Participants

Figure 1: Information on CVT

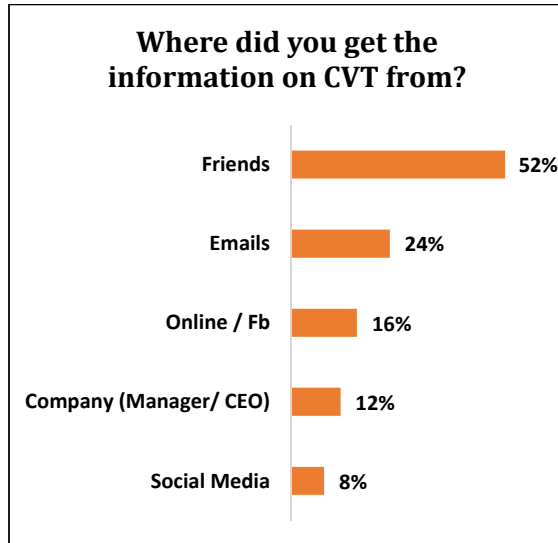


Figure 3: Working as an instructor

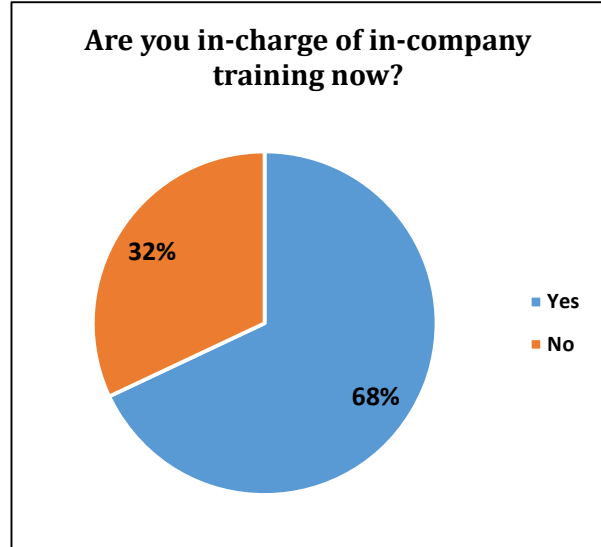


Figure 2: Sharing knowledge and skill at the workplace/company

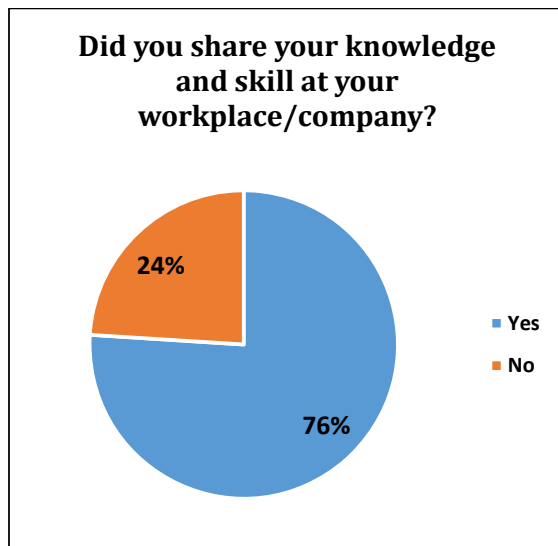


Figure 4: Supporting CVT apprentice

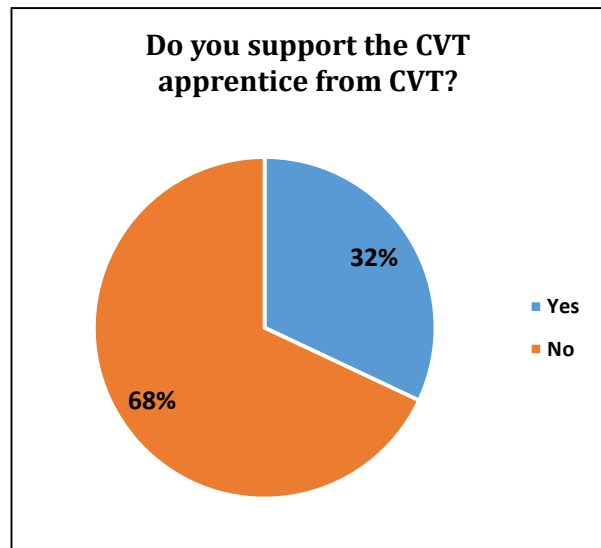
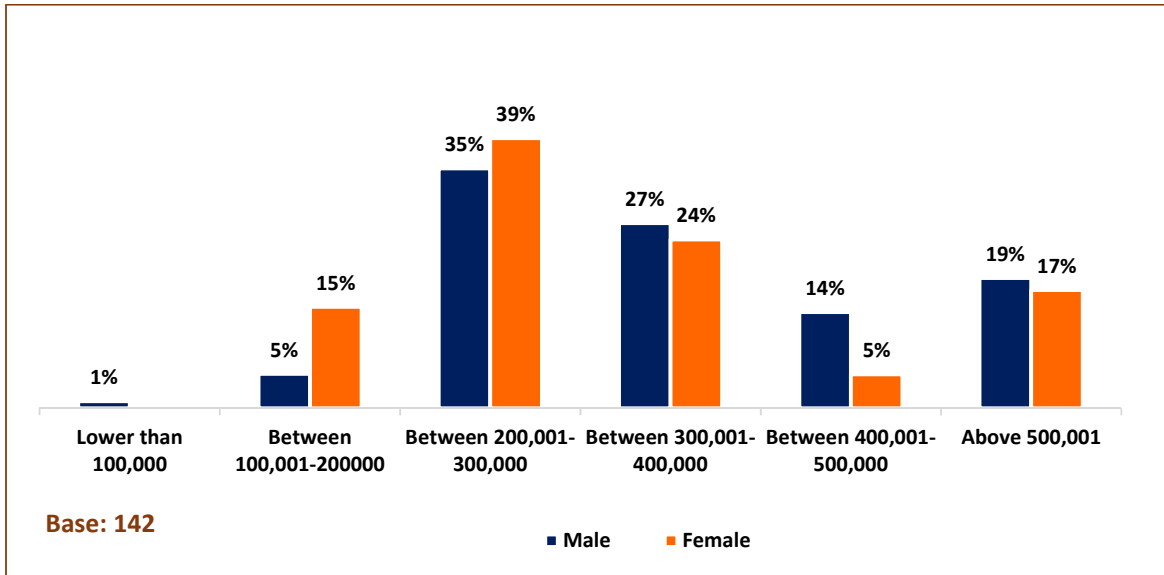


Figure: Salary by Gender (2018) (Kyat)



Annex-6 In-company trainer – Decision Maker

Figure 1: Year of establishment

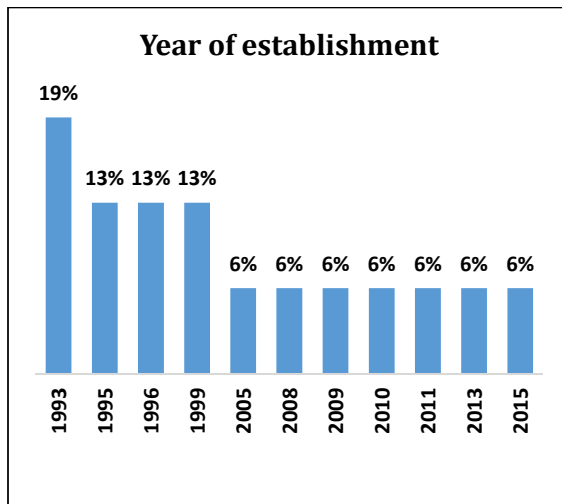


Figure 3: Size of the business

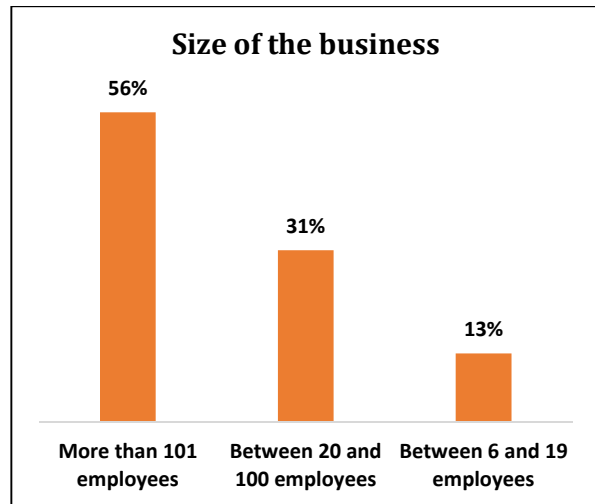


Figure 2: Type of company

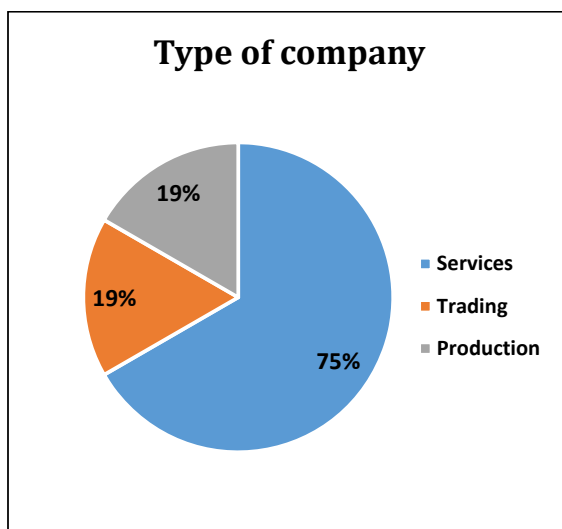
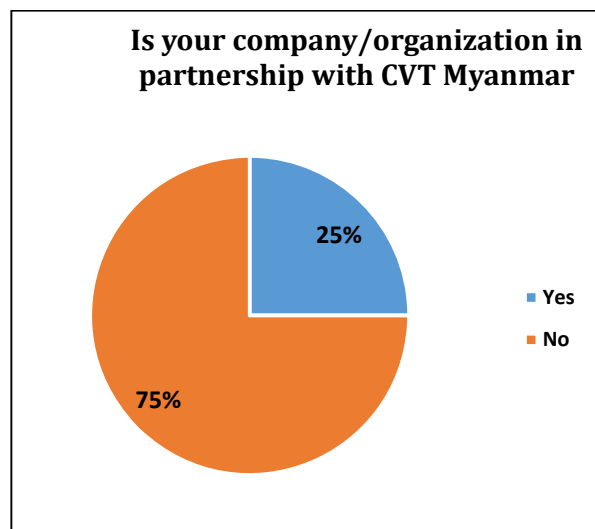


Figure 4: Partnership with CVT Myanmar



Annex-7 Certified Instructor

Figure 1: Year of Enrolment

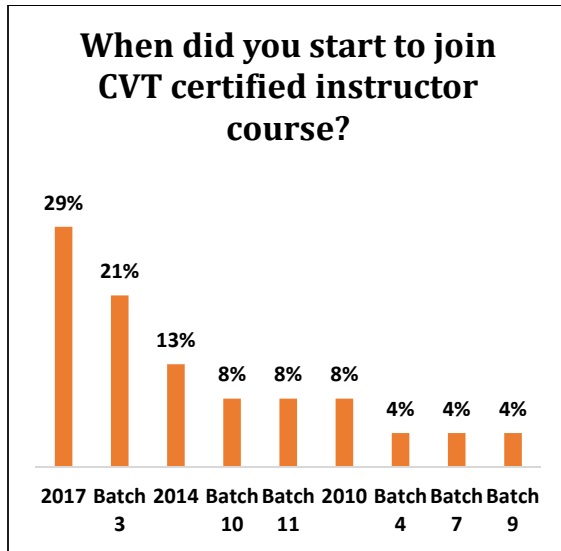


Figure 3: Training at other centers

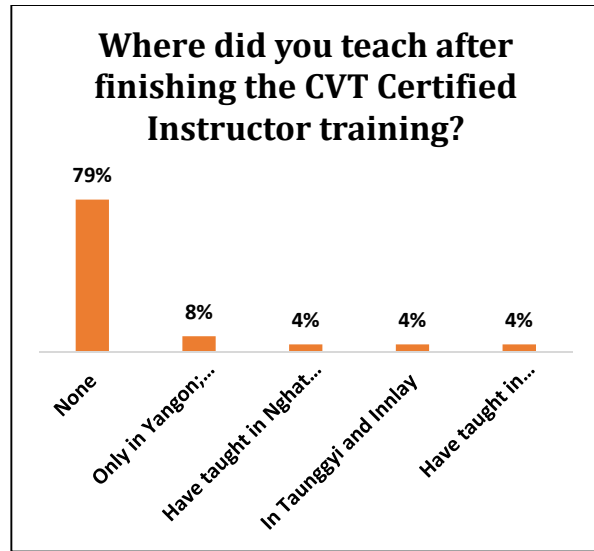


Figure 2: Satisfaction with the classrooms, facilities

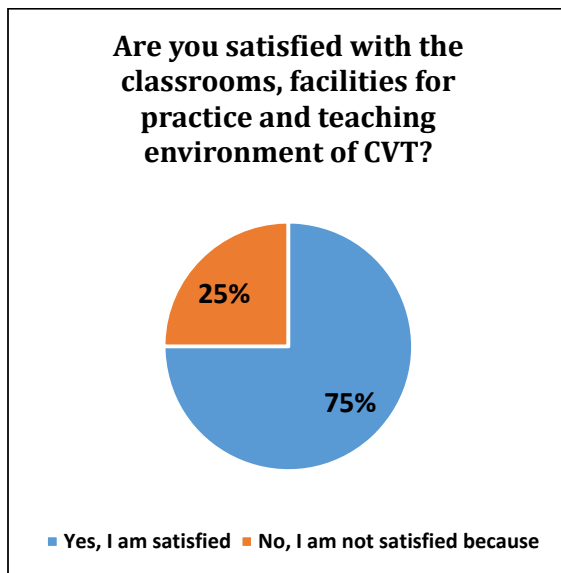
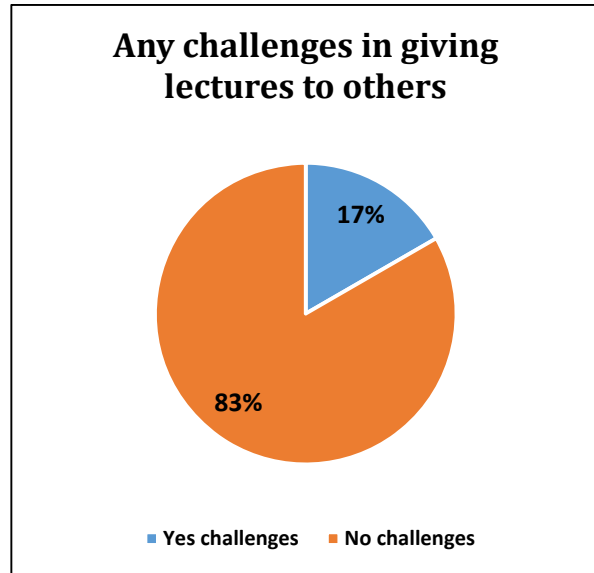


Figure 4: Any challenges in giving lectures to others



Annex-8 YE4M

Figure 1: Relevancy of training

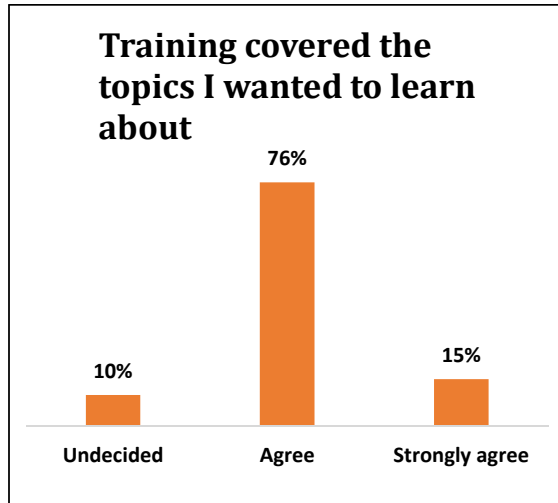


Figure 3: Opinion on training materials (e.g. curriculum, handouts)

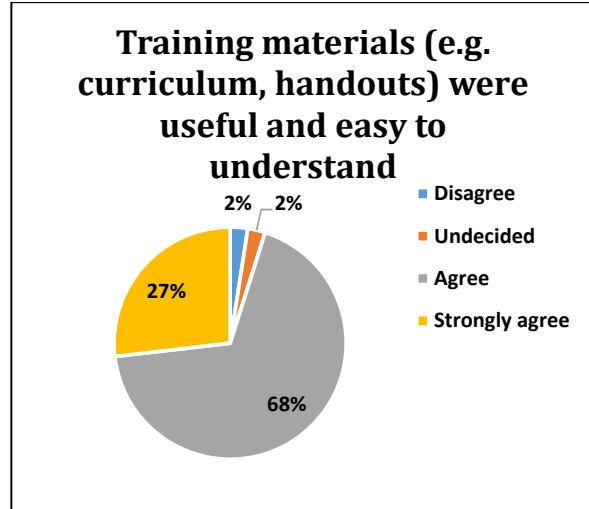


Figure 2: Opinion on the structure

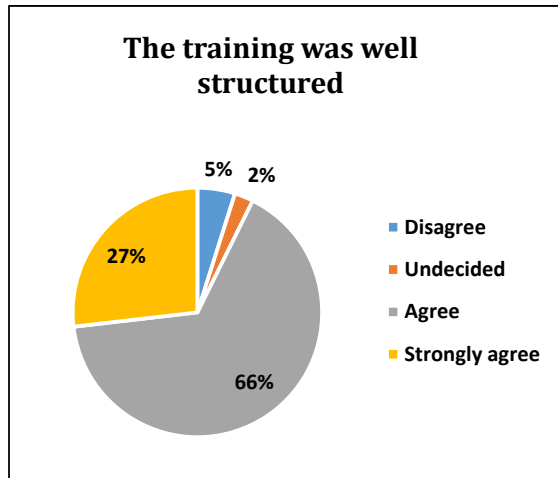


Figure 4: Opinion on the training length

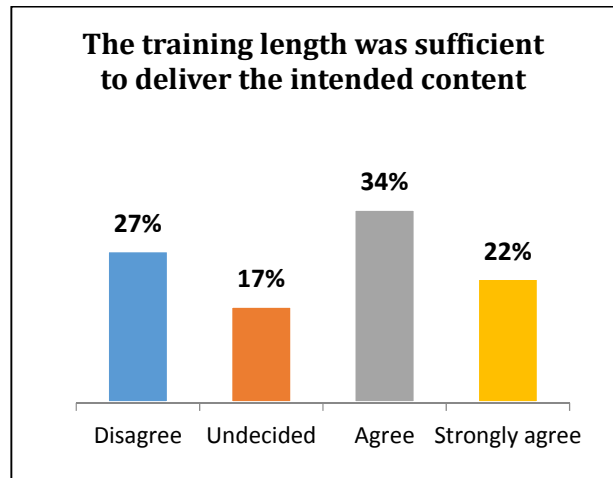


Figure 5: Opinion on teaching methods

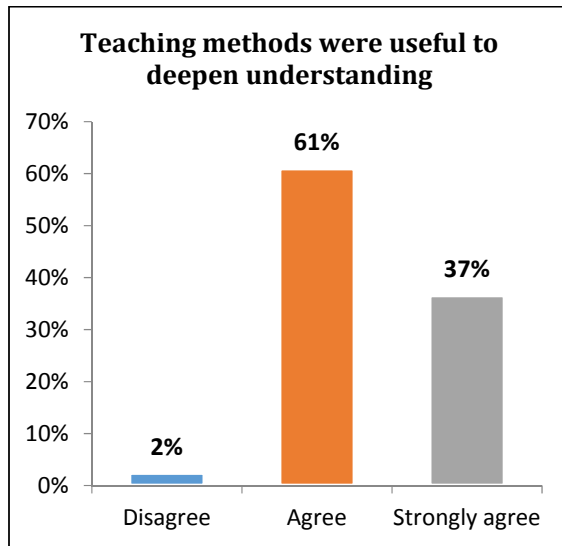


Figure 7: Opinion on competency of teachers

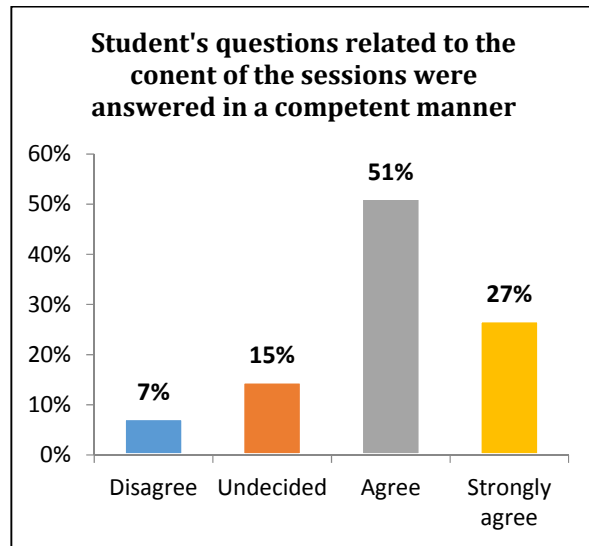


Figure 6: Opinion on business trainers

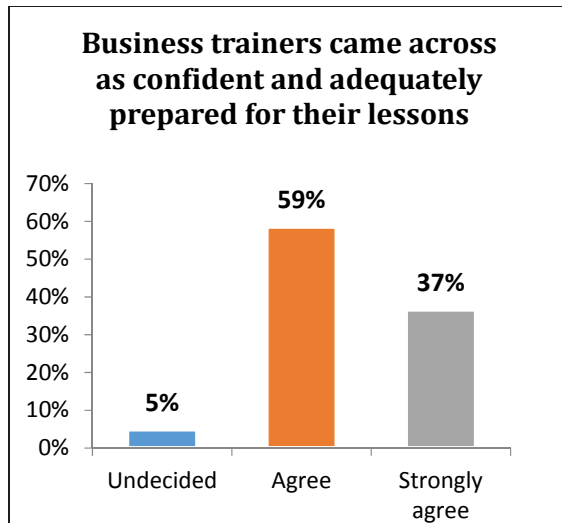


Figure 8: Opinion on explanation

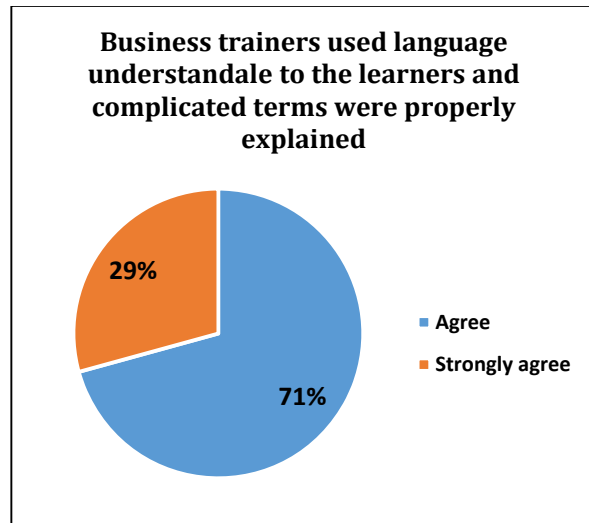


Figure 9: Opinion on training venue

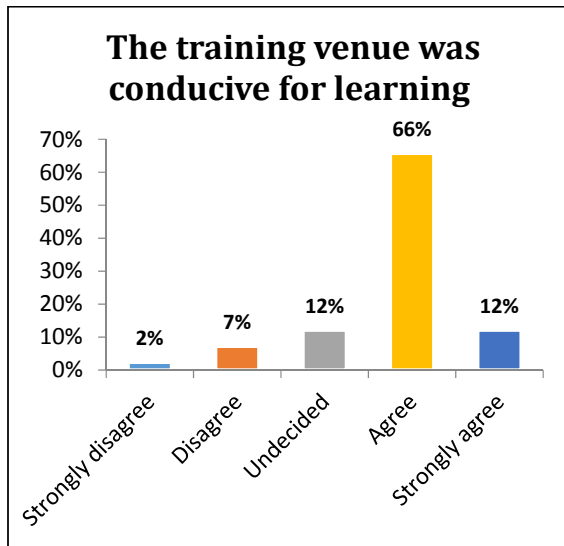


Figure 11: Overall grade

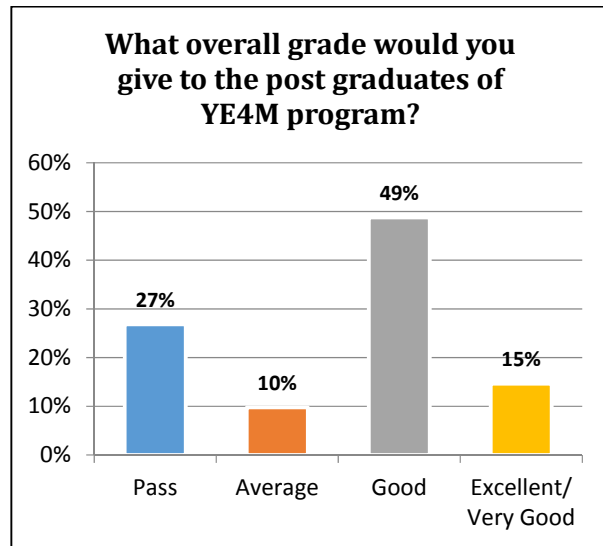


Figure 10: Recommendation

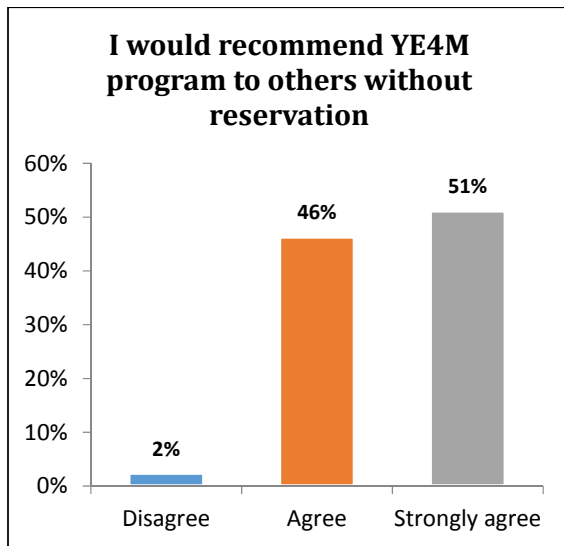


Figure 12: Business during the program

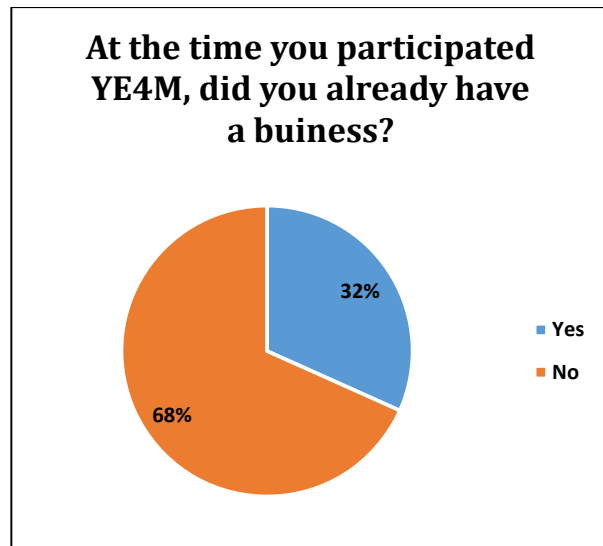


Figure 13: Starting a new business after the program
 Figure 15: Innovation and creation

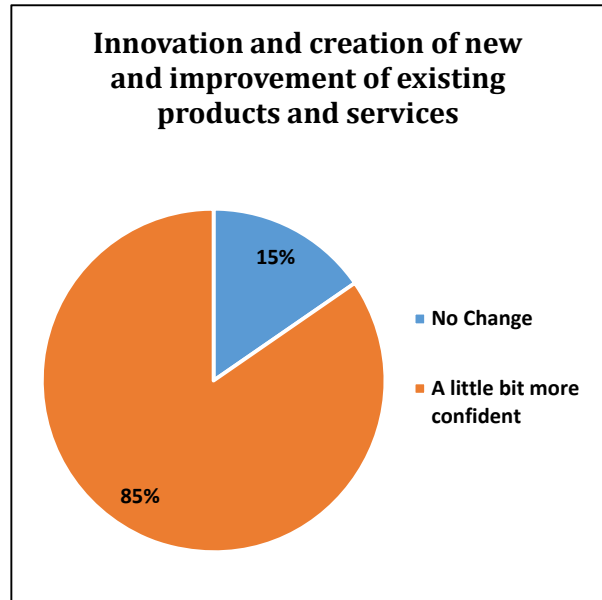
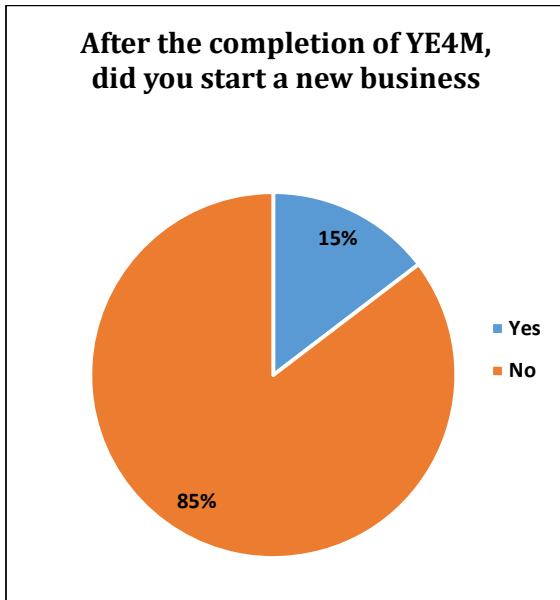


Figure 14: No business during and after the program
 Figure 16: Development of a business plan

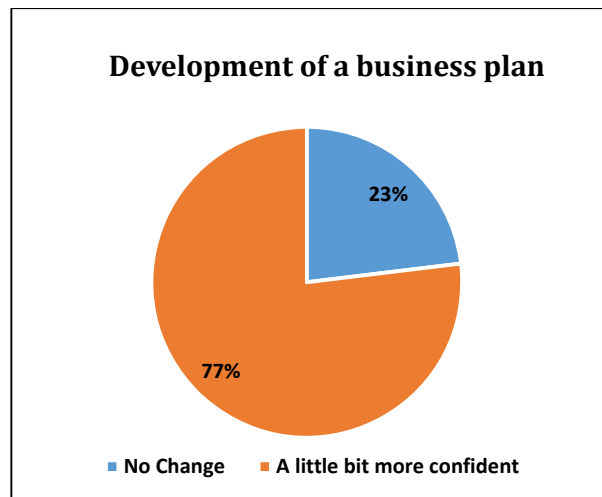
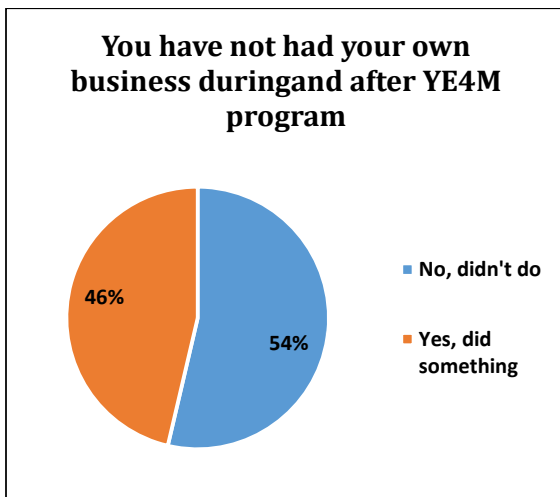


Figure 17: Business organization and management



Figure 19: Sales & Marketing

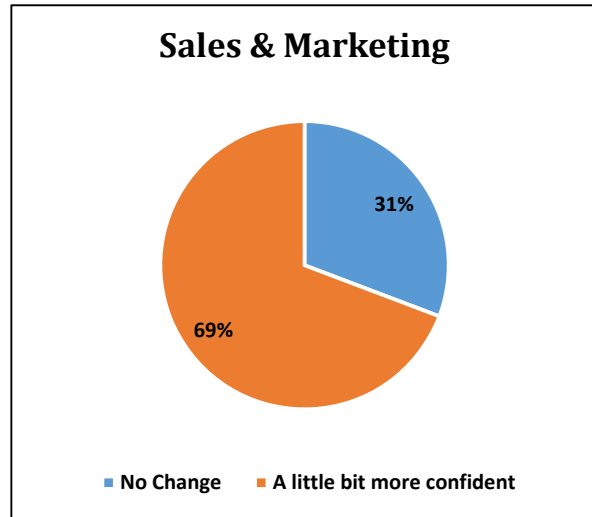


Figure 18: Financial Planning

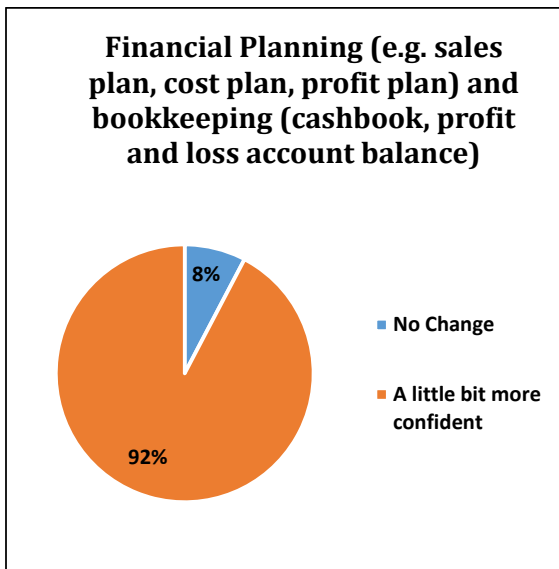


Figure 20: Human Resource Management

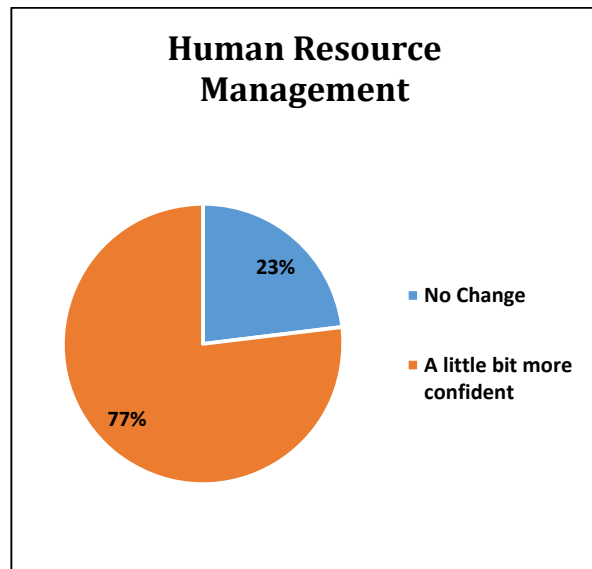


Figure 21: Microeconomics

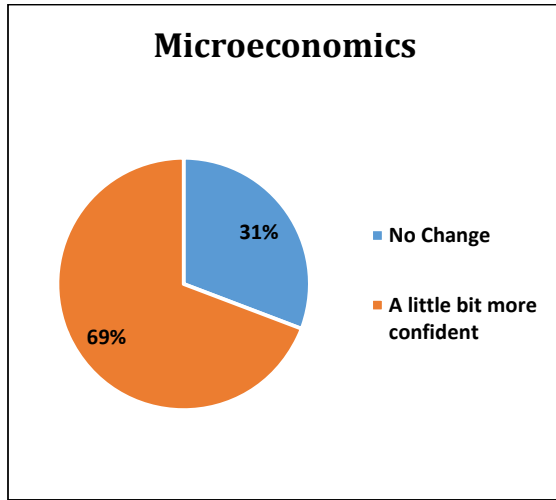


Figure 23: Opinion on starting a business

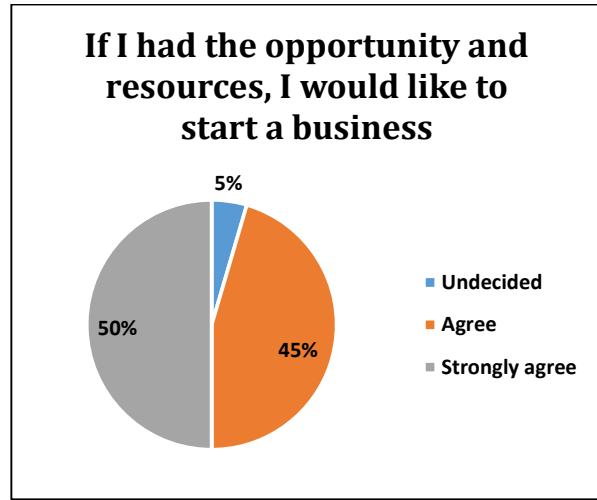


Figure 22: Workforce

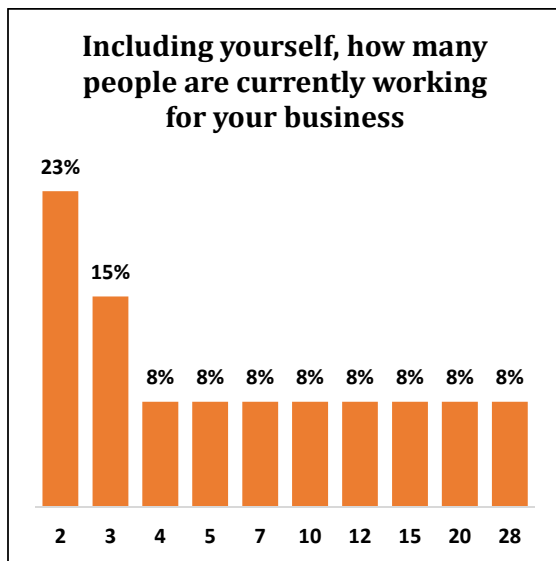


Figure 24: Opinion on the newly acquired knowledge

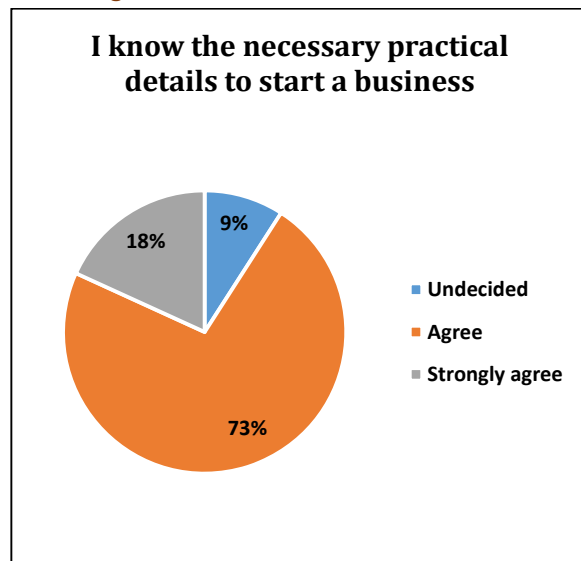


Figure 25: Opinion on probability of the success

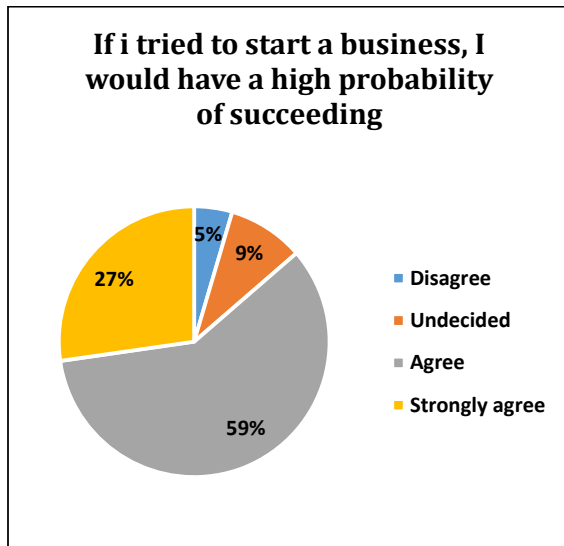


Figure 27: Opinion on training period

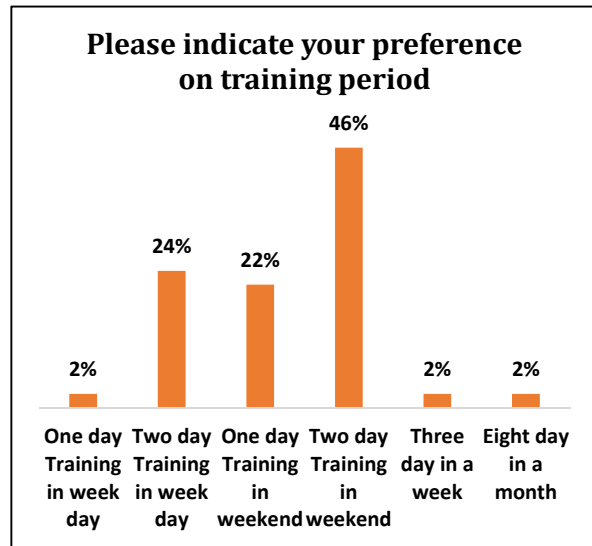


Figure 26: Opinion on additional/new training

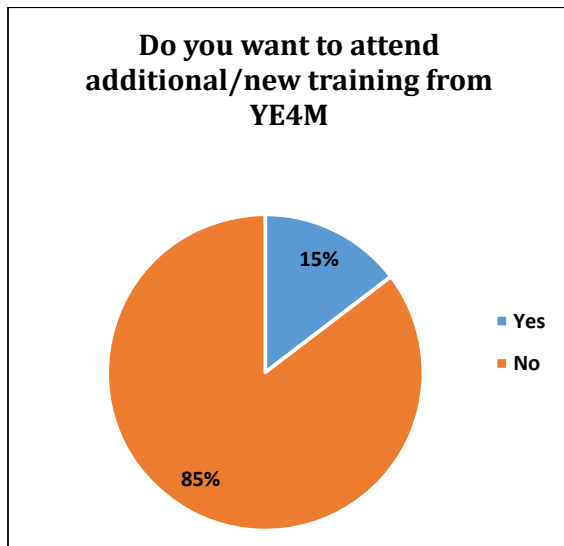


Figure 28: Taking initiative

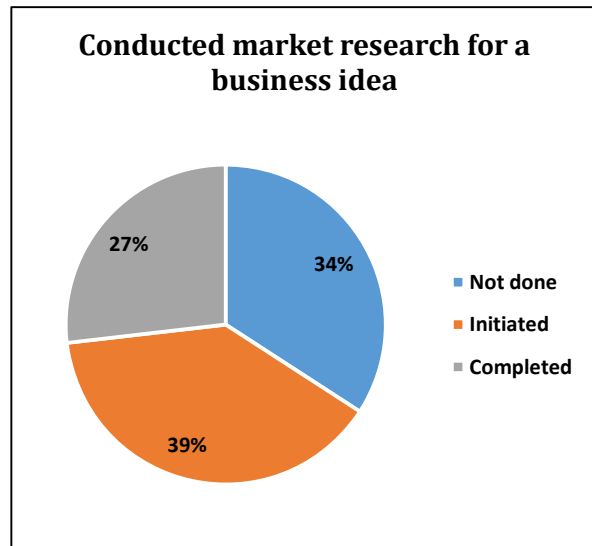


Figure 29: Taking initiative

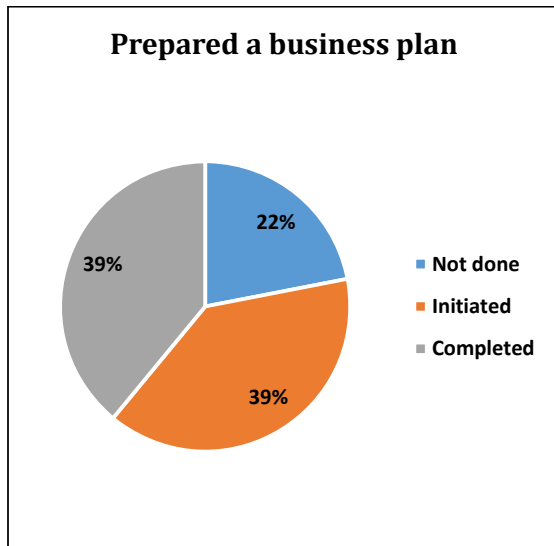


Figure 31: Taking initiative

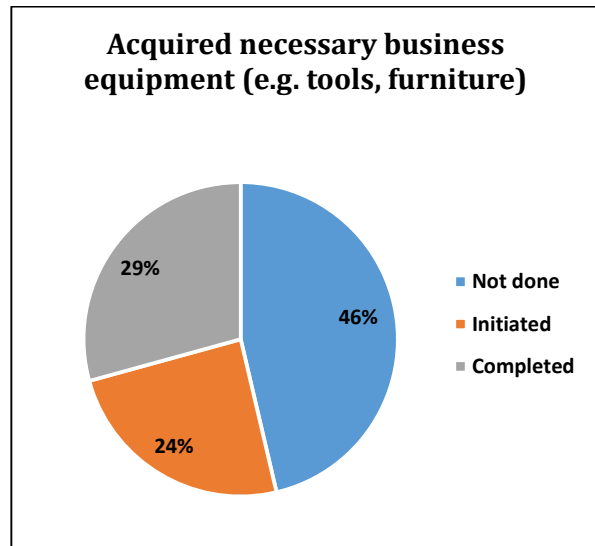


Figure 30: Taking initiative

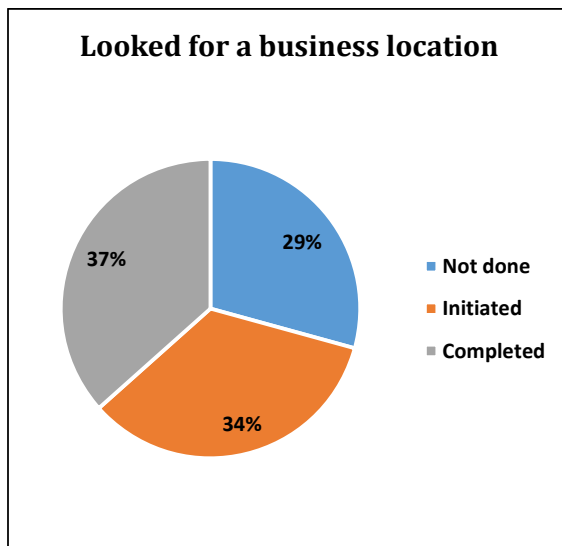


Figure 32: Taking initiative

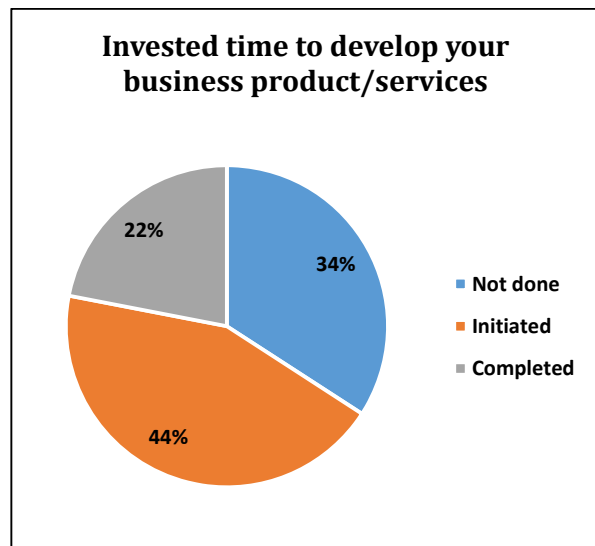


Figure 33: Taking initiative

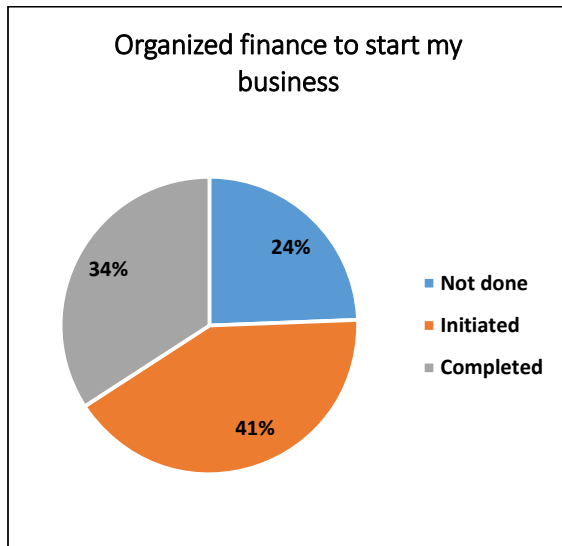


Figure 35: Expected timeline for a new business

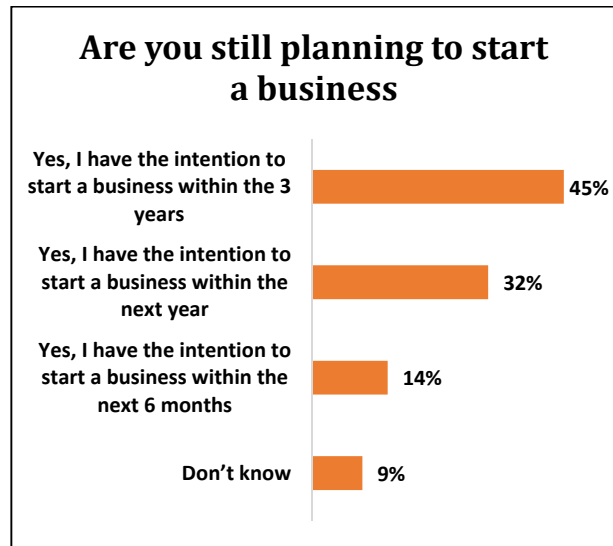
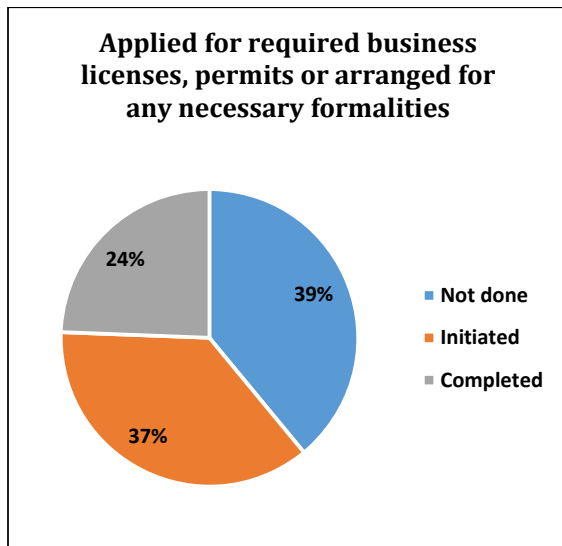


Figure 34: Taking initiative



Annex-9 Success Stories

A graduate of Hotel & Gastronomy Program

Le Planteur Restaurant & Bar in Yangon



(Photo credit: Hello Asia Travel)

In 2003, Ko Thien Zaw Htoo started his career in a restaurant kitchen of Le Planteur Restaurant & Bar as a Kitchen Attendant. A regular customer named Max O'Wey would come and dine there and they would have a pleasant brief talk while he was serving him. One day in 2007, Mr. Max O'Wey came to the restaurant. This time was special: it was to explain about his organization, CVT.

In 2009, with support from the director of Le Planteur, Ko Thein Zaw joined Hotel & Gastronomy as one of batch-3 students. He still remembers those days - he would finish practical lessons at CVT and the next day, his boss would assign him to somewhere else in the restaurant where he can apply his learned skills immediately. Throughout 3 years, he was enjoying his time at CVT - the director paid for the program and would give him leave days for days at CVT.

Three years later in 2012, Ko Thein Zaw would be earning more - salary upped by 100,000 Kyats.

In 2016, he was promoted to headwaiter which is his current position as well. Today, he is extremely good at his job and training others; his salary is doubled and he is enjoying his days at Le Planteur more than ever. With each passing day, he is approaching his dream - to open his own restaurant and spend his days serving customers.

"Right now, looking back, I am very pleased with my achievement and recognition I received from work. I feel very grateful for continuous supports from Mr. Max O'Way, my director and CVT teachers. The idea to go work abroad to earn more once came across my mind. But today, I am in the phase of my life where I can really enjoy every moment and contribute more without going abroad," says Ko Thein Zaw Htoo.

A graduate of Cabinet Maker Program



Some of much appreciated furniture of Ko Aung Aung and team (A & B Furniture and Home Decoration Association)

After graduating from high school, Ko Aung Aung started working. He spent about 4 years before he joined a furniture shop in 2009. His friend owned the shop. One day he realized he could not keep up with the work anymore resulted from lack of skills and decided to quit. His senior suggested him to stay, but encouraged to pursue more education and introduced CVT.

It was 2011 when he joined CVT Cabinet Maker program, and he was completely enjoying so much and realized furniture making was his thing. He would test his newly equipped skills at work and they worked indeed. With 90,000 Kyats in personal savings together with another two friends, they bought a machine and started a business. Today it is known as "A & B Furniture and Home Decoration Association". Gradually, their customer base got bigger and their furniture would be appreciated and demanded.

It was 2015, he was making more money and more confident in his job. He joined Certified Instructor Program (Wood Processing) course. Upon completion, he started training staffs at work. Back in 2016, when he attended YE4M program from CVT, he won the prize money of \$2,000 by participating in "The Business Plan" competition. With this, he bought machines, more than one, and has started taking his business seriously since then.

Today, he is fully integrating what he learned and what is demanded from work. He is a business leader and decision maker. He is a role model of many as a founder of "A & B Furniture and Home Decoration Association." "I encourage everyone to pursue vocational education they prefer. I would like to see CVT producing more young and talented workers from whom we, as business owners, can benefit as well," says Ko Aung Aung.

A graduate of Commercial Assistant Program



When Ma Chit Chit Maw started her career as a Junior Accountant at Yuzana Garden Hotel in 2013, she was depressed - she could not even answer phone calls properly, she was weak in both English (four skills) and Myanmar writing. In a year (2015), she was sent to CVT Commercial Assistant Program by her boss.

She liked to learn about communication and social skills. As time went on, she became happier at work. She was recognized as a friendly person among peers. She figured out how to write a leave letter, interview techniques and of course, most importantly, accounting.

In a period of three years, she was learning ICT subjects as well. She started doing Power Point presentations without breaking a sweat at work. Seniors at work did evaluation and provided positive feedback. She felt amazing.

It was 2017, when she was given a promotion. Today, she is earning more and working at the same company as a Senior Accountant.

"I want young people to find one thing they are passionate about and suggest to choose to attend any programs conducted by CVT," says Ma Chit Chit Maw.

A graduate of Metal Worker Program



A moment at the Train Engine Factory

In 2010, Ko Htun Zaw Hein started working at a Train Engine Factory (Myanmar Railway) as a Metal Worker. Throughout the whole time there, he was unfulfilled as he was just doing some random tasks. As it happened, a friend of his was explaining him about CVT just around the time CVT teachers came to his workplace and provided detailed information.

It was 2012, when he was chosen to attend CVT Metal Worker Program. He was keeping his knowledge updated. Although he felt discouraged for his weak

background education, he enjoyed doing practical works from which he learned about operation procedures, names of machines and quality control. He was also drawing designs his seniors appreciate.

Six months after the graduation in 2015, a day came when he was promoted to a Professional Level 4. He realized he could do more and decided to join CVT Certified Instructor course in 2016. Once he finished, he started providing trainings to staffs.

Recently, he sat for a qualification test to become an Administrative Officer and is excited to hear the result.

A graduate of Electrician Program



A moment at the shop

Back in the years of 2006 and 2007, Ko Arkar Soe was working hard to earn very little - from selling groceries at wet market to pork-sticks along streets side.

It was 2011, when he knew about CVT from his brother-in-law and decided to join CVT Electrician Program. Two years into the program, he quit the job and opened a shop at his house. He started small and business was not going quite well in the first three or four months. He would not give up and as time passed, customers started to notice his works are neat and complete and are appreciated.

The last time he set foot at CVT was quite a long time ago. But he would not forget a thing he learned. He tried so hard to keep up with both work and school. He did not miss a class during his time at CVT

Today his shop provides repair service for electronic appliances such as washing machine, refrigerator and air-conditioner. He is also doing electrical wiring for lighting and power distribution.

"Although it is not a degree, CVT certificate is well-recognized in the market. I want to encourage young people like me, who did not pass the matriculation exam to keep going and not give up. I am happy to spread this good news to everyone who are struggling to make a living and eager to learn," says Ko Arkar Soe.

Annex-10 List of Contact for 2018 Tracer Study

Category of Respondents	Detail Professional	List of Contact Provided by CVT	Field for Interview						Not Contacted /included in the survey	Interviewed Sample
			Missing Phone Number	Incorrect Phone Number	Failed Phone Connection	Out of Yangon	Refuse the Interview	Cancel the appointment		
Partner Company	Commercial Assistant	65	4	4	31	1	2	6	1	28
	Cabinet Maker	57		1	28	3	4		7	19
	Electrician	64	2	1	20	3	2	3	5	28
	Hotel & Gastronomy	59	3	12	36	1	1	1	0	10
	Metalworker	41	3	1	23	3	3	1	1	15
Total		286	12	19	138	11	12	11	14	100
CVT Graduated Apprentice	Commercial Assistant	176	20	40	48	1	10	10	5	60
	Cabinet Maker	140	10	31	28	0	7	21	10	23
	Electrician	260	30	30	101	13	3	32	11	41
	Hotel & Gastronomy	115	20	16	43	2	5	8	4	11
	Metalworker	123	10	26	43	3	1	16	3	15
Total		814	90	143	263	19	26	87	33	150
Young Entrepreneur Programme	YE4M - Batch 7	7			5	1		1		3
	YE4M - Batch 8	8			3				4	5
	YE4M - Batch 9	8	2		5				1	5
	YE4M - Batch 10	8								5
	YE4M - Batch 11	8								6
	YE4M - Batch 12	7								8
	YE4M - Batch 13	7								5
	YE4M - Batch 14	7								4
Total		60	2	0	13	1	0	1	5	41

In Company Trainer (Companies)	ICT C									
		60	2		8	1	20	0	1	16
Total		60	2	0	8	1	20	0	1	16
In Company Trainer (Participants)	ICT-Batch 5	7			2		2	1		2
	ICT-Batch 6	10			2		3	2		1
	ICT-Batch 7	10						3		2
	ICT-Batch 8	10					4		3	8
	ICT-Batch 9	10						2	1	3
	ICT-Batch 10	7					1		4	5
	ICT-Batch 11	6					0	1	1	4
Total		60	0	0	4	0	10	9	9	25
Certified Instructor	Electrician	5								4
	Metalworker	9							5	7
	Wood Processing	4								3
	Food and Beverage	8							3	6
	Food Preparation	5		1						3
	Front Officer	1								1
Total		32	0	1	0	0	0	0	8	24
Grand Total		1312	106	163	426	32	68	108	70	356